

# Survey on the attitudes of Europeans towards tourism

## Analytical report *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)<sup>1</sup> 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 this 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.

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<sup>1</sup> [http://ec.europa.eu/public\\_opinion/flash/fl\\_258\\_en.pdf](http://ec.europa.eu/public_opinion/flash/fl_258_en.pdf) & [http://ec.europa.eu/public\\_opinion/flash/fl\\_291\\_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).
- About a quarter (24%) of respondents who had travelled for leisure purposes had made just one holiday or “short private” trip. About a fifth (21%) had been on two holidays or “short private” trips, 16% had been on three leisure trips and 17% had made between four and five such trips. Finally, one in five respondents, who had travelled for leisure purposes in 2010, had made more than five leisure trips in that year.

### 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**

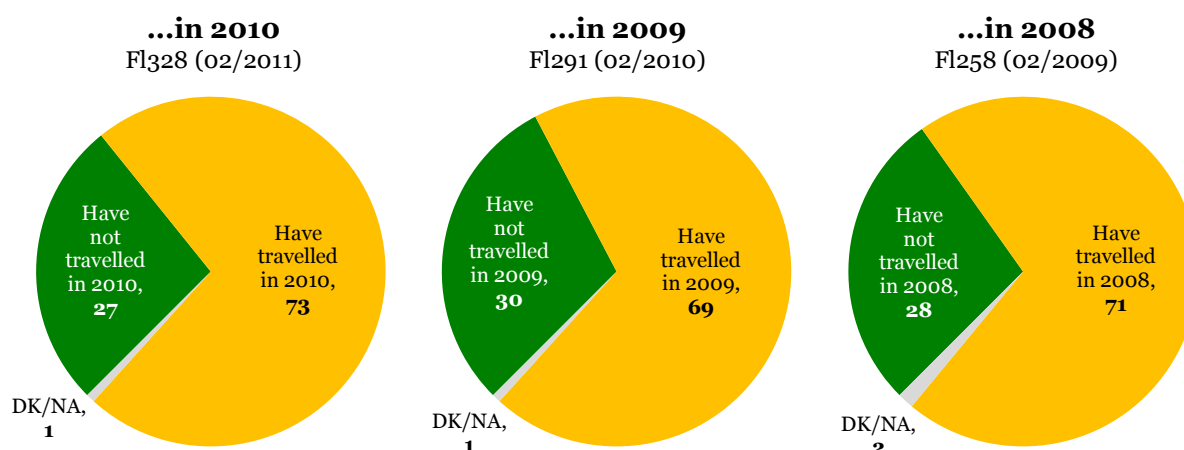
- When asked about their holiday destination in 2011, almost 4 in 10 (38%) EU citizens answered that they were planning a holiday in their home country. One in five interviewees said they were planning to take a holiday within the EU and a somewhat lower proportion (16%) indicated that a non-EU country 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. Respondents' travel profiles in 2010

## 1.1 Proportion of respondents who travelled in 2010

Almost three-quarters (73%) of EU citizens said they had travelled, either for business or private purposes, at least once in 2010; the current figure was slightly higher than in earlier years (69% in 2009 and 71% in 2008)<sup>2</sup>. Note: travelling was defined as spending one night away from home, for private or business purposes.

### Proportion of EU citizens who have travelled – EU27 (minimum one night away from home, for private or business purposes)



Q1. During 2010/2009/2008, how many times have you travelled for business or private purposes where you were away from home for a minimum of one night?  
%, Base: all respondents, EU27

### Country variations<sup>3</sup>

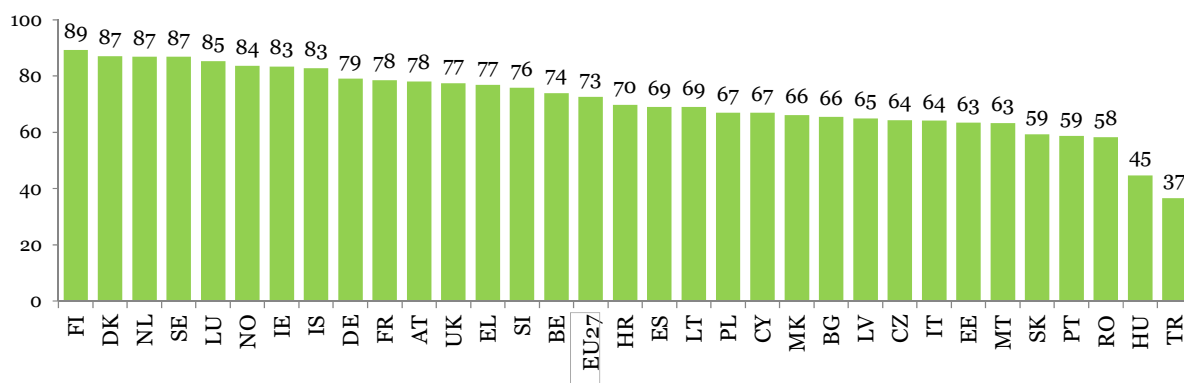
The proportion of respondents who had travelled, for business or private purposes, at least once in 2010 ranged from 37% in Turkey to 89% in Finland. Other countries where more than 8 in 10 respondents had travelled in 2010 were Denmark, the Netherlands, Sweden (all 87%), Luxembourg (85%), Norway (84%), Ireland and Iceland (both 83%). In Hungary, just 45% of respondents had travelled, for business or private purposes, at least once in 2010 – the lowest share among the EU Member States.

<sup>2</sup> Flash Eurobarometer N° 291 was conducted in February 2010 and asked EU citizens if they had travelled, for business or private purposes, in 2009. Flash Eurobarometer N° 258 was conducted in February 2009 and asked EU citizens if they had travelled, for business or private purposes, in 2008

<sup>3</sup> Country charts in this report show the results for each of the 27 EU Member States and for Croatia, Turkey, the former Yugoslav Republic of Macedonia, Norway and Iceland. The “EU27” results present the average proportion for the 27 EU Member States (and therefore exclude Croatia, Turkey, the former Yugoslav Republic of Macedonia, Norway and Iceland) – taking into account differences in population size across individual Member States.

## Proportion of respondents who have travelled in 2010

(minimum one night away from home, for private or business purposes)



Q1. During 2010, how many times have you travelled for business or private purposes where you were away from home for a minimum of one night?

%, Base: all respondents, by country

### Socio-demographic considerations<sup>4</sup>

The older the respondents, and the earlier they had completed their education, the less likely they were to have travelled in 2010. Indeed, 64% of the over 54 year-olds had travelled in 2010, for business or private purposes, compared to 80% of 15-24 year-olds. Similarly, while 49% of respondents with the lowest level of education had travelled in 2010, this proportion increased to 85% for respondents with the highest level.

The proportion of travellers was also higher among EU citizens living in metropolitan areas (78% vs. 69% of rural residents and 73% of those living in urban areas) and among employees and the self-employed (83% and 79%, respectively, vs. 64% of non-working respondents and 66% of manual workers). All these patterns exactly mirrored those observed in the previous wave.

For further details, see annex table 1b.

## 1.2 “Short private” and holiday trips in 2010

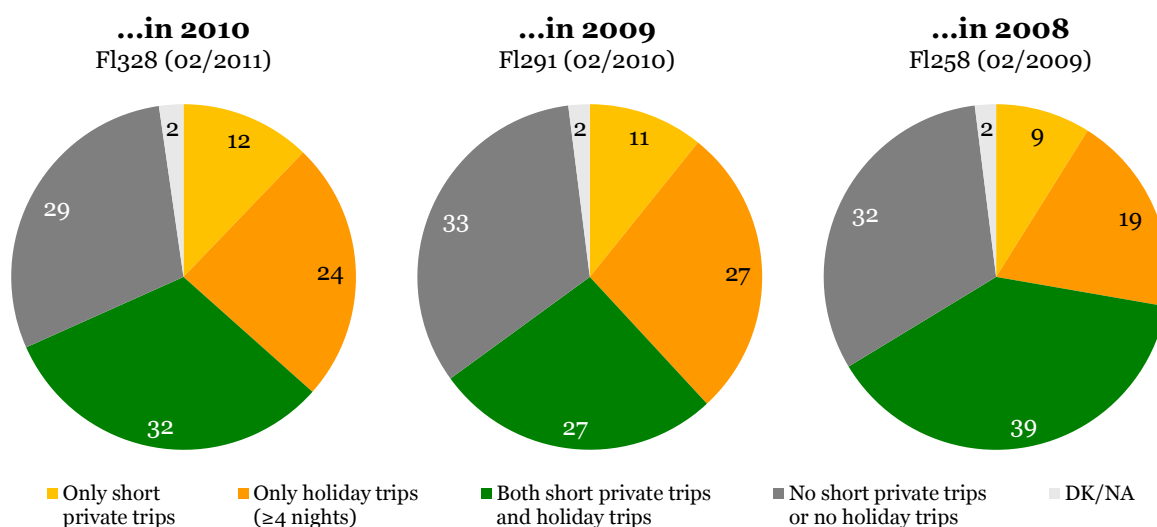
The previous section looked at the proportion of respondents who had travelled for business or private purposes in 2010. This section *focuses solely on travel for private purposes* – distinguishing between “short private” and holiday trips as defined below.

- “Short private” trips: spending between one and three nights away from home for private reasons
- Holiday trips: spending four nights or more away from home – on holiday – while staying in paid accommodation or in a second home.

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.

<sup>4</sup> This section – and other sections discussing results by socio-demographic characteristics – focuses solely on interviews conducted in the EU (i.e. they do not include Croatia, Turkey, the former Yugoslav Republic of Macedonia, Iceland and Norway).



**“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

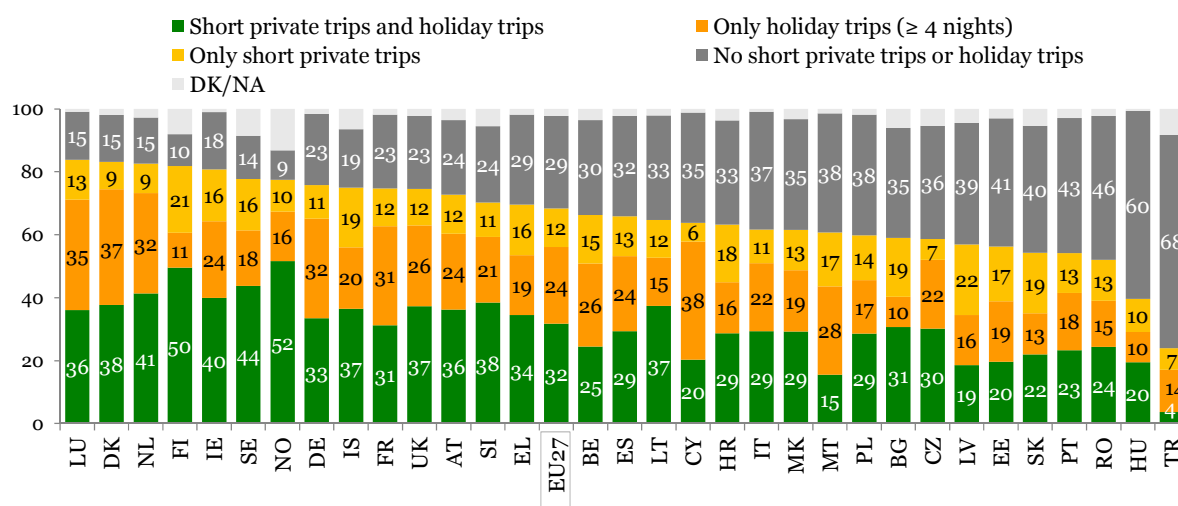
Comparing travel for leisure purposes in 2008, 2009 and 2010, it could be seen that, in the current wave, respondents were somewhat less likely to say that they had not travelled for leisure purposes (29% in 2010 vs. 32%-33% in 2008/2009). Furthermore, last year's results had shown a decrease in the 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**

The individual country results showed a ranking that was similar to the one observed for the results of travel in general (for business and private purposes – section 1.1). 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%).

A slim majority (52%) of interviewees in Norway and half of those in Finland had made at least one “short private” trip and at least one holiday trip in 2010. In Turkey, on the other hand, just 4% had made at least one “short private” trip and at least one holiday trip; in Malta and Latvia, this proportion was less than a fifth (15% and 19%, respectively).

Respondents in Luxembourg, Denmark and Cyprus were particularly likely to have made at least one holiday trip, but no “short private” trips (35%-38%). The proportion of respondents who had made at least one “short private” trip but no holiday trips in 2010 was just over one in five in Finland and Latvia (21% and 22%, respectively).

**“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

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. In 2009, 58% of Maltese respondents had not made any “short private” or holiday trips; this proportion decreased to 38% in 2010 (-20 percentage points). Similarly, in Latvia, there was a decrease from 54% in 2009 to 39% in 2010 (-15 percentage points). In that country, the proportion of respondents who had made at least one short private trip and at least one holiday trip increased from 8% in 2009 to 19% in 2010 (+11 points). In Malta, on the other hand, the largest increase was seen in the proportion of respondents who had made only short private trips (from 3% in 2009 to 17% in 2010, +14 points).

Bulgaria, Italy and Romania also saw increases of at least 10 percentage points in the proportion of interviewees who had made at least one “short private” trip and at least one holiday trip (Bulgaria: from 20% in 2009 to 31% in 2010; Italy: from 18% to 29%; Romania: from 14% to 24%).

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. In 2009, 26% of respondents in Cyprus had not made “short private” or holiday trips, this share increased to 35% in 2010 (+9 points). In Estonia, this proportion increased from 31% in 2009 to 41% in 2010 (+10 points).

### *Socio-demographic considerations*

In accordance with the results for travel in general (for business and private purposes), 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).

Frequent travellers – i.e. those who had made at least one “short private” trip and one holiday trip in 2010 – were more likely to be highly educated (44% vs. 15% of respondents with the lowest level of education), employees (43% vs. 24% of manual workers and those not working) and living in metropolitan areas (37% vs. 30%-31% of rural and urban residents). Full-time students, 25-39 year-olds and self-employed respondents were also more likely than their counterparts to have made both “short private” trips and holiday trips (37%-40%).

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

(Row %)	Short private trips and holiday trips	Only holiday trips	Only short private trips	No short private trips or holiday trips	DK/NA
EU27	32	24	12	29	2
Male	34	23	12	28	2
Female	29	26	12	31	2
AGE: 15-24	35	27	14	22	3
AGE: 25-39	39	23	12	24	2
AGE: 40-54	35	23	13	27	2
AGE: 55+	23	26	11	38	2
Self-employed	40	20	14	23	3
Employees	43	25	12	17	2
Manual workers	24	22	13	38	2
Not working	24	25	12	38	2
Metropolitan zone	37	25	12	23	3
Other town/urban/centre	31	25	12	29	3
Rural zone	30	24	12	33	2
EDUCATION: -15 years of age	15	20	11	53	1
EDUCATION: 16-20	28	25	13	32	2
EDUCATION: 20+	44	24	12	17	3
EDUCATION: Still in education	37	27	13	20	3

**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?**

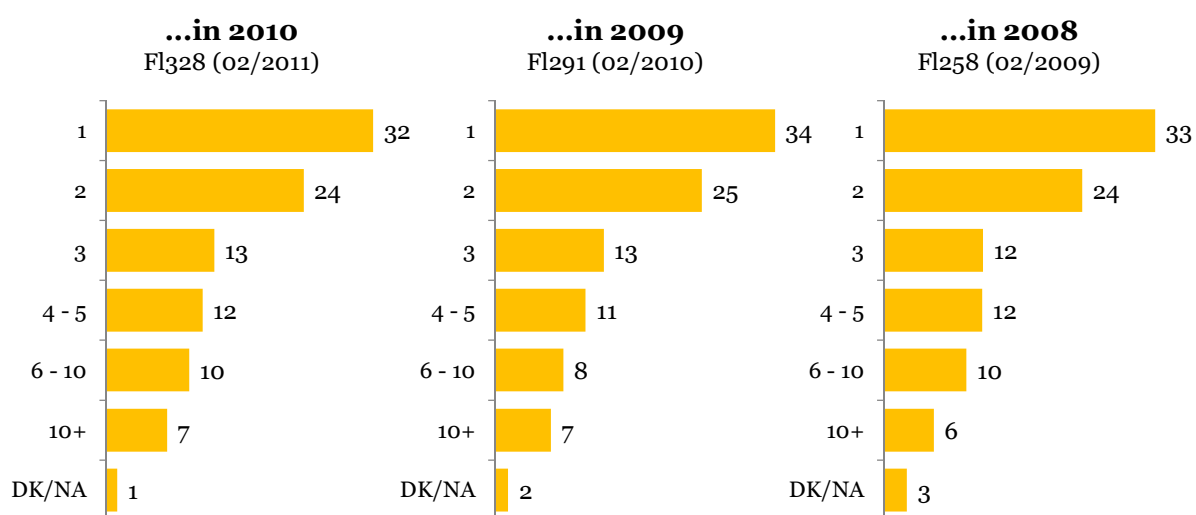
%, Base: all respondents, EU27; by socio-demographics

### 1.3 Frequency of “short private” and holiday trips

#### Frequency of “short private” trips

Focusing solely on EU citizens who had made at least one “short private” trip in 2010, it was noted that a majority had made one or two such trips (32% and 24%, respectively); these results were similar to those for the frequency of “short private” trips in 2009 and 2008. About one in seven (13%) EU citizens had made three “short private” trips, 12% had made four or five “short private” trips, 10% had made between 6 and 10 such trips and 7% had made more than 10 “short private” trips.

#### Number of “short private” trips – EU27 (less than four nights away from home)



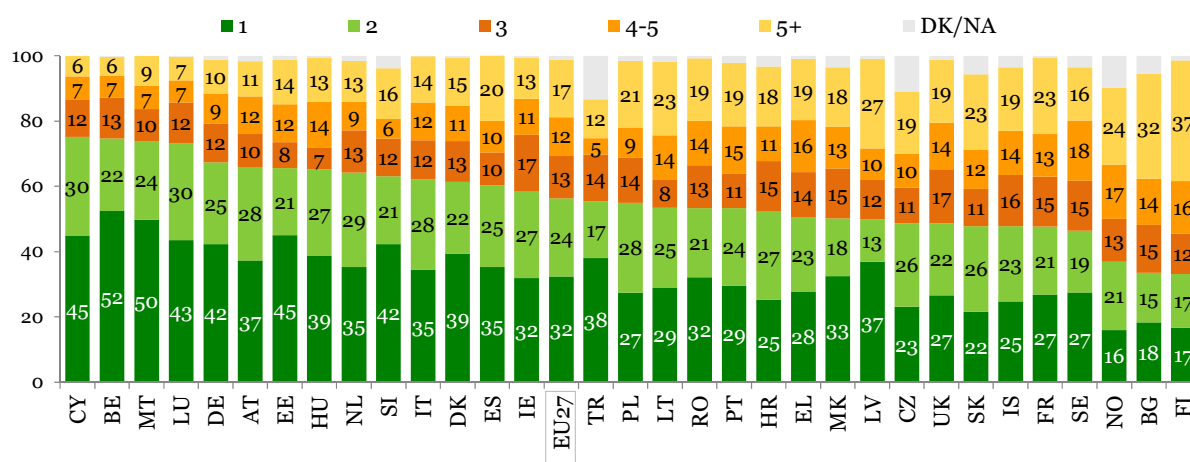
Q2. And how many of these were short private trips, where you stayed away for less than four nights?  
%, Base: who made at least one short private trip, EU27

In a majority of countries surveyed, at least half of respondents – who had made “short private” trips in 2010 – said they had made one or two such trips (ranging from 50% in Latvia to 75% in Cyprus). Furthermore, in Malta and Belgium, about half had made one “short private” trip in 2010 (50% and 52%, respectively).

Finnish respondents were particularly likely to have made more than five short private trips (37% of those who had made at least one short private trip in 2010); in Bulgaria, roughly a third (32%) had made as many short trips<sup>5</sup>. In Cyprus, Belgium, Luxembourg and Malta, on the other hand, less than a tenth (6%-9%) of interviewees had made more than five short private trips.

<sup>5</sup> Bulgarian respondents were less likely than Finnish respondents to have made “short private” trips in 2010 (52% vs. 77%). As a consequence looking at all respondents (and not only those respondents who had made at least one “short private” trip) showed that Bulgarian respondents were considerably less likely than Finnish respondents to have taken more than five such trips (18% vs. 29%).

## Number of “short private” trips in 2010

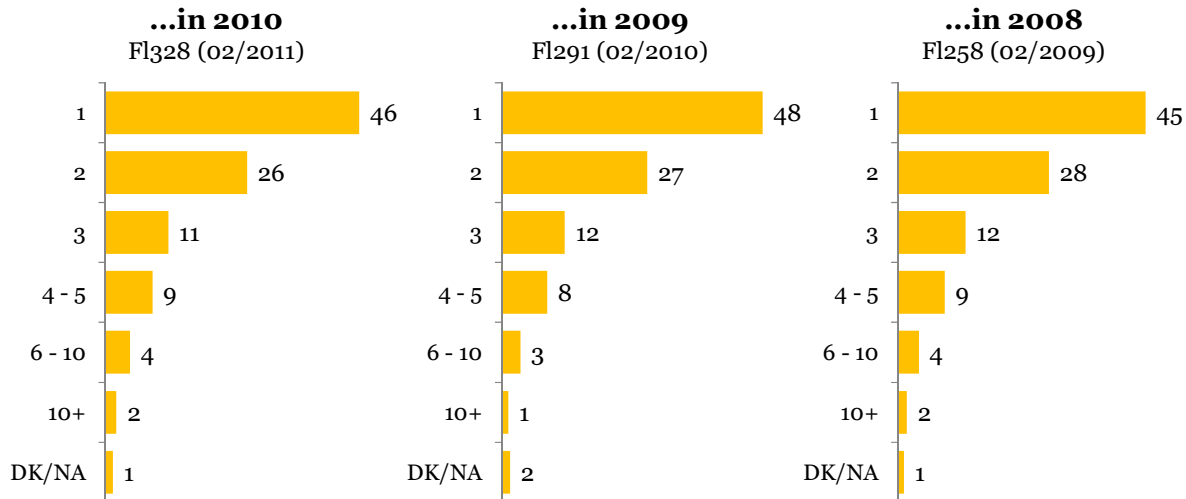


Q2. And how many of these were short private trips, where you stayed away for less than four nights?  
%, Base: who made at least one short private trip in 2010, by country

## Frequency of holiday trips

Looking at EU citizens who had been on holiday during 2010, 46% had made one holiday trip and 26% had taken two such trips. About 1 in 10 (11%) holidaymakers had made three holiday trips in 2010, 9% had made four or five such trips and 6% had taken more than five holidays. These figures were similar to those for the previous wave.

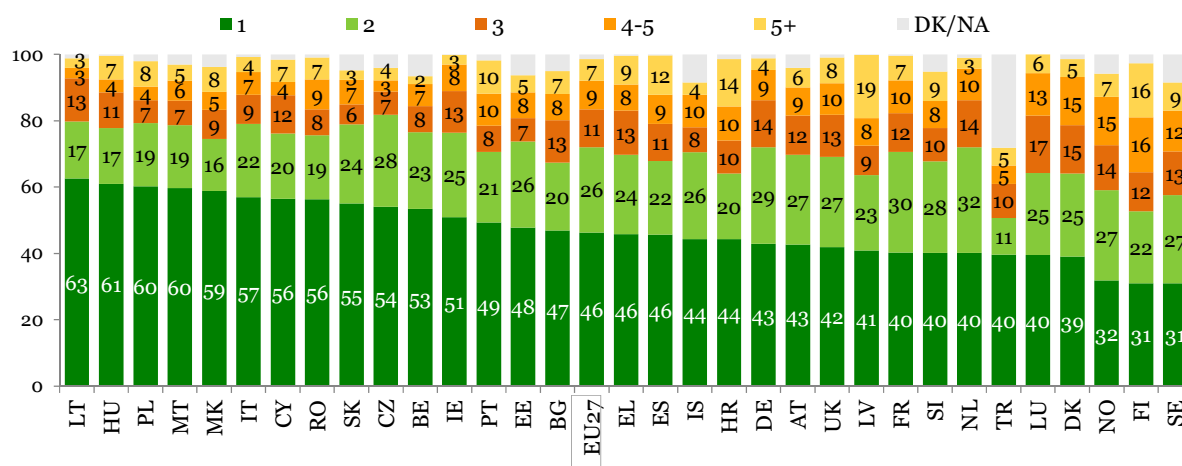
### Number of holiday trips – EU27 (minimum four nights away from home)



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: who made at least one holiday trip, EU27

Focusing solely on respondents who had made at least one holiday trip in 2010, a majority of these respondents in 12 countries had made one holiday trip in that year. Respondents in Malta and Poland (both 60%), Hungary (61%) and Lithuania (63%) were the most likely to have made just one holiday trip. In Sweden, Finland and Norway, however, less than a third of holidaymakers gave a similar response (31%-32%). In Finland, 44% of respondents who had been on holiday during 2010, had made at least three such trips in that year. In six other countries, more than a third of holidaymakers made at least three holiday trips: Sweden and Croatia (both 34%), Denmark (35%), Norway, Latvia and Luxembourg (all 36%).

## Number of holiday trips in 2010



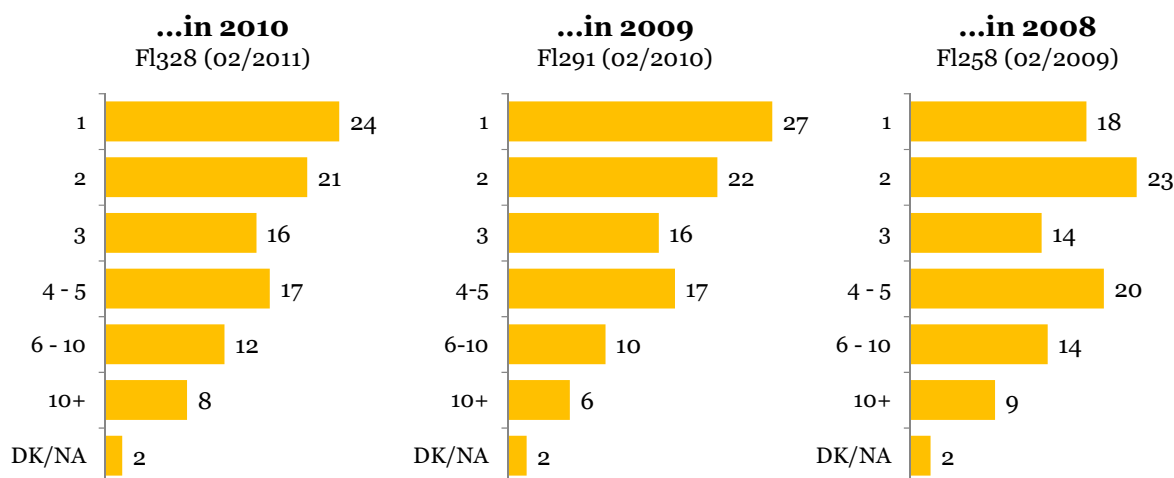
Q3. How many times did you go on holiday in 2010, where you either stayed in paid accommodation / or in your second home for a minimum of four nights?  
%, Base: who made at least one holiday trip in 2010, by country

## Frequency of “short private” and holiday trips

When looking at the total number of trips – i.e. summing the number of “short private” and holiday trips – it could be observed that about a quarter (24%) of respondents who had travelled for leisure purposes had made just one trip. About a fifth (21%) had been on two holidays or “short private” trips, 16% had been on three private trips and 17% had made between four and five such trips. Finally, one in five respondents, who had travelled for leisure purposes in 2010, had made more than five leisure trips in that year.

In 2008, 18% of EU citizens who had travelled for leisure purposes had made just one trip; in 2009, this proportion had increased to 27% (+9 percentage points). The results of the current wave, however, showed a small decrease in this proportion: from 27% in 2009 to 24% in 2010 (-3 percentage points). Meanwhile, the proportion of EU citizens who said they had made more than six holidays or “short private” trips decreased from 23% in 2008 to 16% in 2009 (-7 points), yet rose again to 20% in 2010 (+4 points).

## Number of “short private” trips and/or holiday trips – EU27

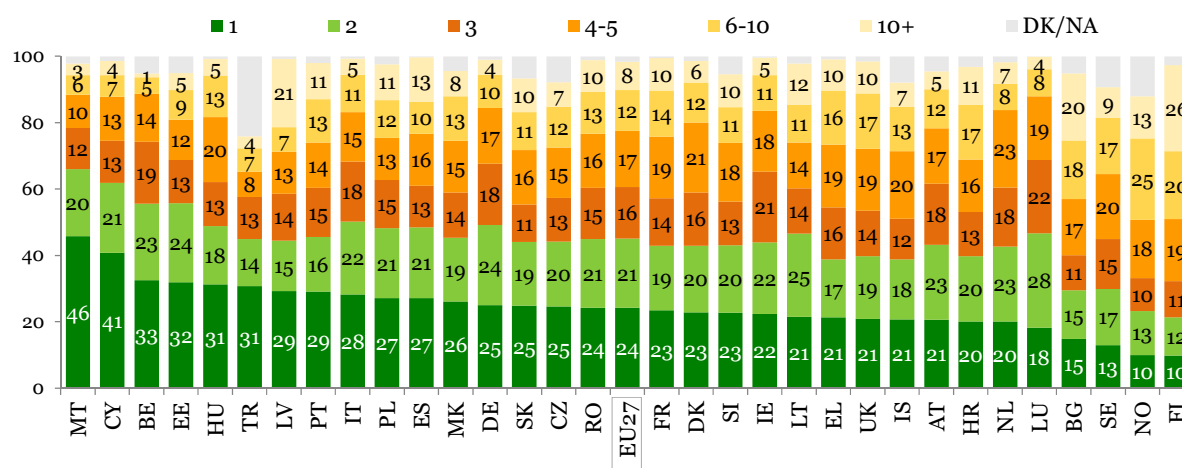


Q2. And how many of these were short private trips, where you stayed away for less than four nights?  
Q3(2011-2010)/Q4(2009). How many times did you go on holiday in 2010/2009/2008, where you either stayed in paid accommodation / or in your second home for a minimum of four nights?  
%, Base: respondents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

In Finland and Norway, less than a quarter of respondents – who had travelled for leisure purposes in 2010 – had only made one or two “short private” or holiday trips (22%-23%); the corresponding figure for Bulgaria and Sweden was 30%. In Malta and Cyprus, on the other hand, more than twice as many respondents had not made more than one or two leisure trips (66% and 62%, respectively). In addition, in Belgium and Estonia, a majority of respondents only went on one or two such trips (both 56%).

In Finland, Norway and Bulgaria, a majority of respondents, who had travelled for private purposes in 2010, answered that they had been on at least four “short private” or holiday trips during that year (65%, 56% and 55%, respectively); the corresponding figure for Sweden was somewhat lower (46%). In sharp contrast, only about a fifth of Maltese, Turkish and Belgian respondents had made at least four “short private” or holiday trips in 2010 (19%-20%).

### Number of “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: respondents who made at least one short private trip or holiday trip in 2010, by country

In about half of the countries surveyed, the current survey showed an increase in the frequency of travel when compared to the previous wave – i.e. among respondents who had travelled for private purposes, there was a decrease in the proportion who had made just one “short private” or holiday trip and an increase in the proportion who had been on two or more leisure trips.

The largest increases in the frequency of travel were seen in Latvia, Bulgaria and Romania. For example, in Latvia, the proportion of respondents who made only one “short private” or holiday trip decreased from 39% in 2009 to 29% in 2010 (-10 percentage points), while the proportion of those who had been on two or more leisure trips increased from 60% to 70% (+10 points).

### ***Socio-demographic considerations***

The socio-demographic analysis of the frequency of travel showed that respondents with the lowest levels of education were less likely to have made more than one trip for leisure purposes – this effect was seen both when looking at the number of “short private” trips and the number of holiday trips. For example, while 72% of the most educated respondents – who had made short private trips in 2010 – had made at least two such trips during 2010, 55% of the least educated respondents had done so. Similarly, while 60% of the former had made at least two holiday trips in 2010, the corresponding proportion for the latter was 42%.

The effect of age on the frequency of travel was only seen in terms of the number of holiday trips: the frequency of such trips was highest among the over 54 year-olds. Among respondents who had made short private trips in 2010, 57% of over 54 year-olds had made at least two holiday trips in 2010 vs. 48%-53% respondents in the other age groups.

While 63% of women – who had made short private trips in 2010 – had made more than one “short private” trip in 2010, the corresponding proportion for men was 69%. The difference was smaller concerning the number of holiday trips: 54% of men (who had gone on holiday in 2010), compared to 51% of women, had gone on at least two holidays in 2010.

Metropolitan residents were also more likely to have made more than one holiday trip in 2010 (58% vs. 50%-52% of rural and urban dwellers). Furthermore, a larger proportion of respondents living in metropolitan or urban areas reported having made more than one “short private” trip in 2010 (68% vs. 63% of rural residents).

Finally, the effect of the respondents’ occupational status was dependent on the type of travel: the frequency of “short private” trips was lowest among manual workers and non-working respondents (62%-63% had made at least two such trips in 2010 vs. 73% of self-employed respondents and 68% of employees), while the frequency of holiday trips was lowest among manual workers (43% had made at least two holiday trips during 2010 vs. 53%-56% of those in other occupational groups).

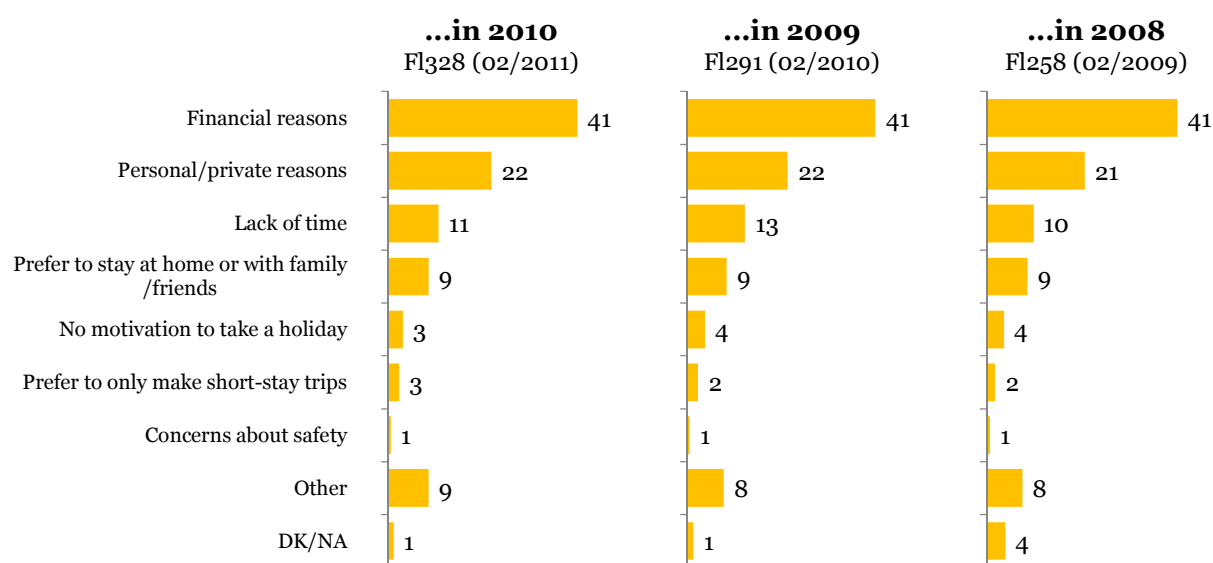
For more details, see annex tables 2c and 3c.



## 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.

### EU citizens' main reason for not having gone on holiday – EU27



Q4(2011-2010)/Q5(2009). What was the main reason why you did not go on holiday in 2010/2009/2008?  
%, Base: respondents who did not make a holiday trip (and those who had not travelled at all), EU27

### Respondents not going on holiday in 2010 due to financial considerations

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.

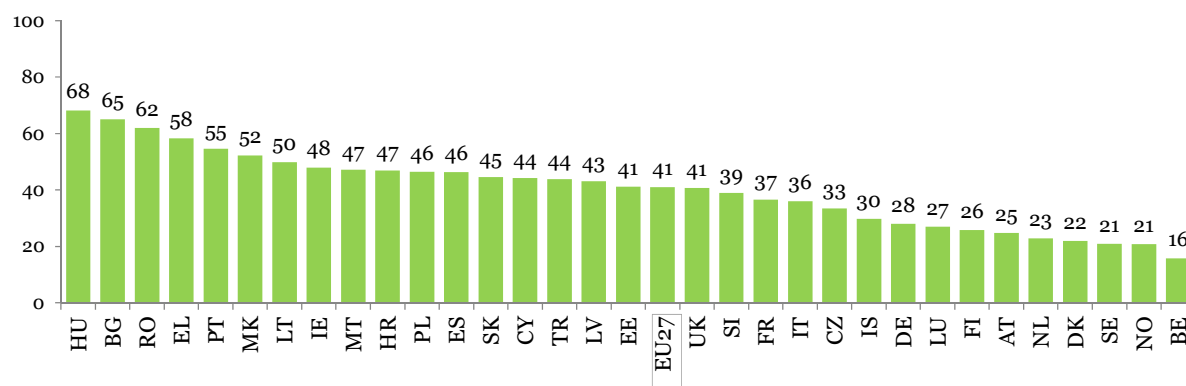
Looking at individual country results for the proportions of respondents who had not made any short private trips or holiday trips and the proportions of respondents who named financial obstacles for not having made such trips, similarities could be seen<sup>6</sup>; for example:

- Respondents in Hungary and Romania were not only among the most likely not to have travelled for leisure purposes in 2010 (60% and 46%, respectively), they were also among the most liable to say that this had been due to financial reasons (68% and 62%, respectively).

<sup>6</sup> The correlation coefficient for the relationship between the proportion of respondents who had not made any leisure trips and the proportion who named financial obstacles for not having made such trips, in each EU country, was equal to .67 – this number signifies a moderately strong correlation between the two variables.

- Respondents in Norway, Finland, Sweden, Denmark, Luxembourg and the Netherlands, on the other hand, were among the least likely not to have made a leisure trip in 2010 (9%-15%) and to state that financial obstacles had prevented them from making such a trip (21%-27%).

### 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?

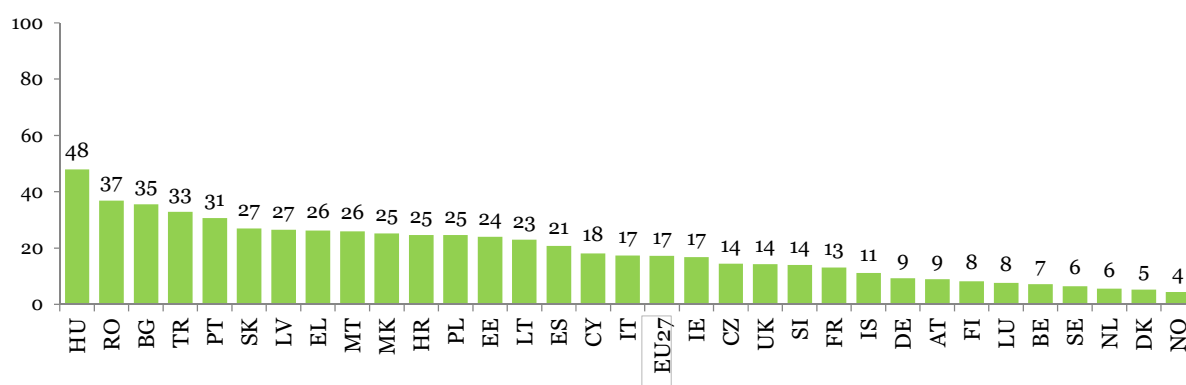
%, Base: respondents who did not make a holiday trip in 2010 (and those who had not travelled at all in 2010), by country

A comparison between the reasons for not going on holiday in 2010 and in 2009 showed that the proportion of respondents who cited financial reasons has decreased most significantly in Slovenia (from 50% to 39%; -11 percentage points), the former Yugoslav Republic of Macedonia (from 61% to 52%; -9 points) and Estonia (from 49% to 41%; -8 points). An opposite trend – i.e. an increase in the proportion citing financial reasons – was most noticeable in Greece (from 46% to 58%; +12 points) and Norway (from 12% to 21%, +9 points).

When looking at the total EU population (i.e. all EU citizens and not just those who did not go on holiday in 2010), it could be seen that 17% of all EU citizens had not gone on holiday in 2010 due to financial considerations<sup>7</sup>. At the individual country level, this proportion ranged from 4% in Norway to 48% in Hungary.

### Financial reasons for not having gone on holiday in 2010

Base: all respondents



Q4. What was the main reason why you did not go on holiday in 2010?

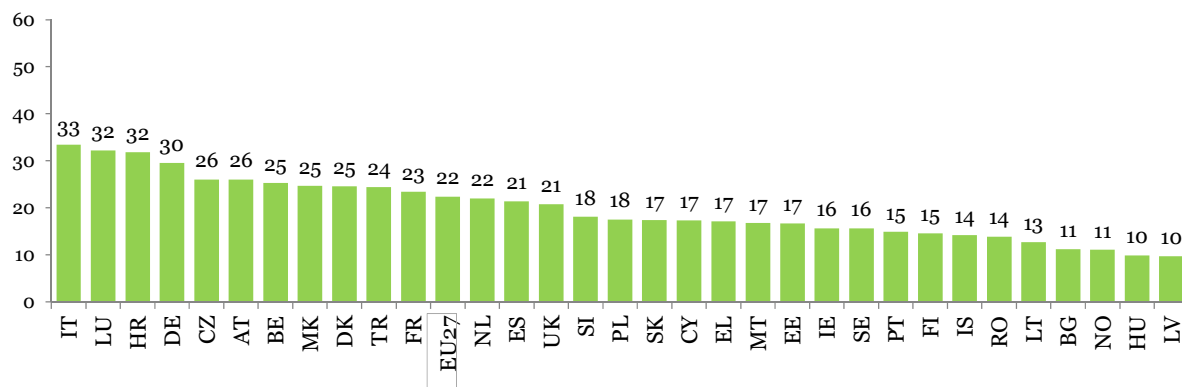
%, Base: all respondents, by country

<sup>7</sup> Note: Looking at the total EU population, 56% of all EU citizens had made at least one holiday trip in 2010, 17% had not gone on holiday in 2010 due to financial considerations and 24% listed non-financial reasons for having not gone on holiday (1% gave a “don’t know” response). These proportions were calculated by combining respondents’ responses to question 3 (section 1.2) and question 4 (this section).

### Non-financial reasons for not going on holiday in 2010

About 3 in 10 Germans (30%), Croats (32%), Luxembourgers (32%) and Italians (33%) – who had not taken a holiday in 2010 – said this was because of **personal or private reasons**. On the other hand, just about 1 in 10 Latvian, Hungarian, Norwegian and Bulgarian interviewees mentioned personal reasons for not having gone on holiday (10%-11%).

#### Personal or private reasons for not having gone on holiday in 2010

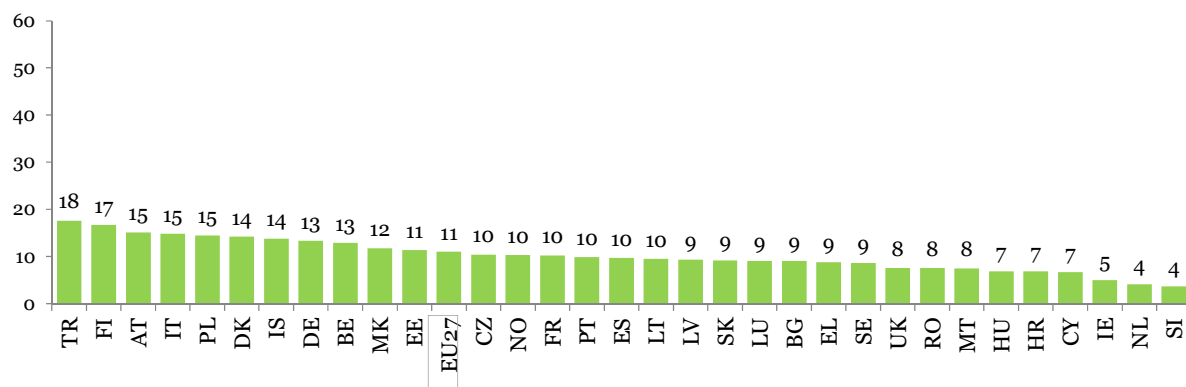


#### Q4. What was the main reason why you did not go on holiday in 2010?

%, Base: respondents who did not make a holiday trip in 2010 (and those who had not travelled at all in 2010), by country

The proportion of respondents who did **not have time to go on holiday** ranged from approximately 1 in 20 in Slovenia (4%), the Netherlands (4%) and Ireland (5%) to about one in six in Turkey (18%) and Finland (17%).

#### Lack of time as a reason for not having gone on holiday in 2010

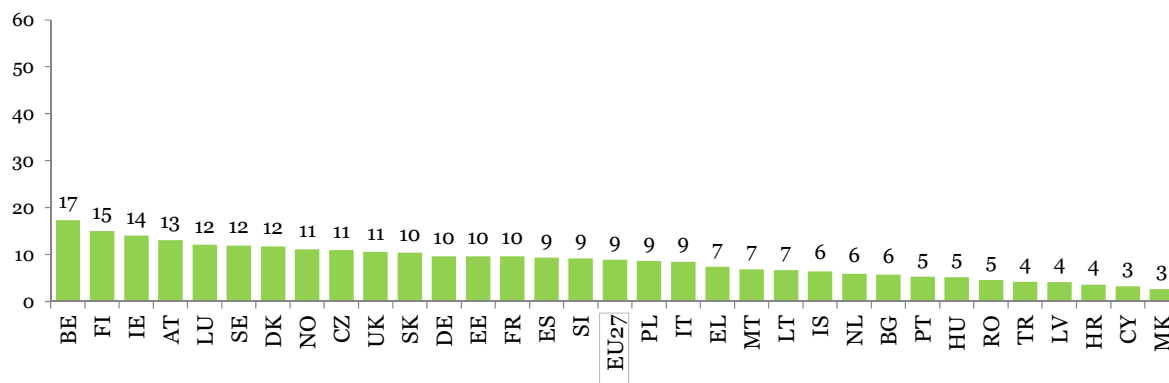


#### Q4. What was the main reason why you did not go on holiday in 2010?

%, Base: respondents who did not make a holiday trip in 2010 (and those who had not travelled at all in 2010), by country

Similarly, the proportion of respondents who did not go on holiday because they **preferred to stay at home or to be with friends or family** was less than 1 in 20 in the former Yugoslav Republic of Macedonia (3%), Cyprus (3%), Croatia (4%), Latvia (4%) and Turkey (4%), but was roughly a sixth in Belgium (17%).

#### **Prefer to stay at home or with friends/family** as a reason 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

Other reasons for not having gone on holiday in 2010 – such as not being motivated to take a holiday and a preference for short trips – showed less variation across countries. The proportion of respondents who said they had **not been motivated** to take a holiday in 2010 ranged from virtually none in Poland to 10% in Slovenia. Similarly, the proportion of respondents who **preferred to only make short trips** ranged from virtually none in Croatia to 12% in Slovenia. Finally, the proportion of interviewees who said they had not gone on holiday because of **safety/security concerns** was less than 5% in all countries surveyed.

For more details, see annex table 4a.

#### **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. For example, while 55% of manual workers said financial considerations had caused them not to take a holiday in 2010, only 33% of self-employed respondents, 39% of non-working respondents and 42% of employees mentioned this as the main reason. Similarly, 35% of full-time students and respondents with the highest level of education, who did not go on holiday in 2010, said this was for financial reasons; this proportion increased to 43%-44% for respondents with low and average levels of education.

Women, the over 54 year-olds, respondents with the lowest and highest levels of education and non-working respondents were more likely than their counterparts to cite **personal reasons** for not having taken a holiday in 2010. For example, while 30% of the oldest respondents said they had not gone on holiday for personal reasons, just 13% of 15-24 year-olds and 17%-18% of 25-54 year-olds selected this response.

**A lack of time** was most frequently cited by self-employed respondents (26%). Other groups that were more likely than their counterparts to answer that they had not gone on holiday due to a lack of time included men (14% vs. 8% of women), 15-54 year-olds (14%-19% vs. 6% of the over 54 year-olds), respondents with the highest level of education and full-time students (15%-19% vs. 6% of respondents with the lowest level of education), employees and manual workers (14% and 16%, respectively vs. 7% of non-working respondents).

Finally, the youngest and oldest respondents, as well as non-working respondents, were slightly more inclined to say that they had not gone on holiday in 2010 because they preferred to **stay at home or to be with family/friends**. For example, 11% of the youngest and the oldest respondents gave this answer, compared to 6% of the 25-54 year-olds.

For more details, see annex table 4b.

### 3. Characteristics of respondents' main holiday trip in 2010

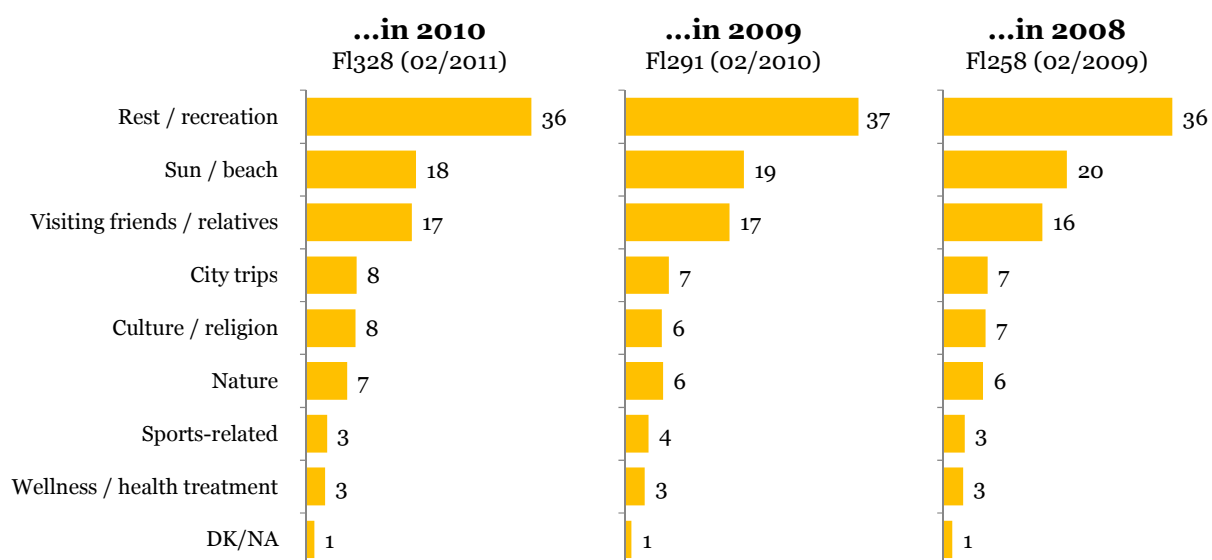
Respondents who took at least one holiday in 2010 were asked a number of questions about their main holiday trip in that year. More precisely, they were asked to specify their major motivation for that vacation (i.e. recreation, city trip, visiting friends etc.), to identify the method of transport used and to say how the holiday had been organised.

Note: In this chapter, all results presented focus solely on those respondents who went on holiday in 2010 – for brevity we often refer to these respondents as “holidaymakers”.

#### 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%). Overall, these results were, once again, similar to those from previous waves of the survey.

##### 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

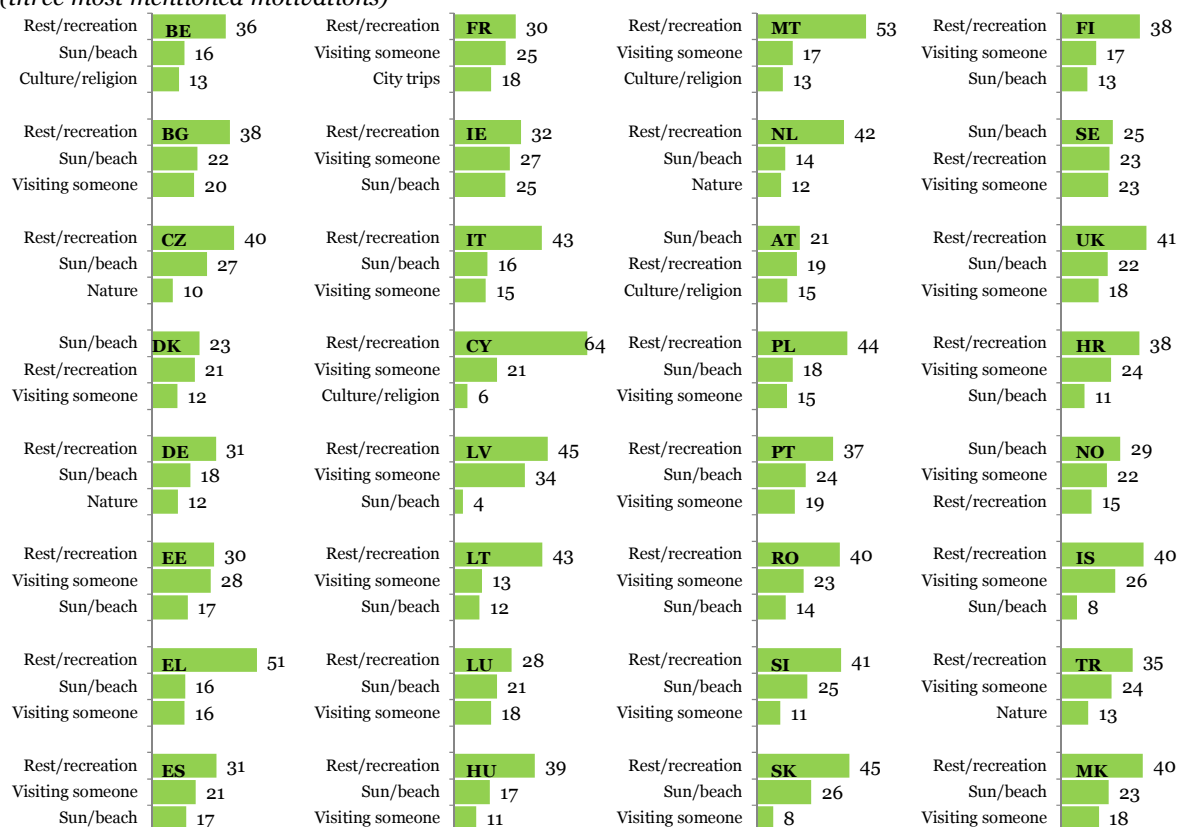
In almost all countries included in this study, the largest proportion of holidaymakers said they were looking primarily for “**rest and recreation**” when they went on their main holiday in 2010. The proportion selecting “rest and recreation” was the highest in Cyprus (64%). In two other countries, 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%); in these countries, “rest and recreation” appeared in the second or third position. “Sun/beach” was also among

the three most mentioned factors in almost all other countries; the only exceptions were Cyprus, France, Malta and Turkey.

In a clear majority of the countries included in this study, **visiting friends or relatives** also appeared in the top three of major motivations for respondents' main holiday trip in 2010 (without ever being selected by the largest proportion of respondents); the proportion mentioning such social reasons was the highest in Latvia (34%). Finally, "culture and religion" and "nature" each appeared in the top three of most mentioned factors in four countries; for example, "culture and religion" was selected by 15% of holidaymakers in Austria, while "nature" was mentioned by 13% of respondents in Turkey.

### The major motivation for respondents' main holiday trip in 2010 (three most mentioned motivations)



Q5. What was the major motivation for your main holiday trip in 2010?  
%, Base: respondents who made at least one holiday trip in 2010, by country

### 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).

Looking at differences between the various educational groups, respondents with the lowest level of education and full-time students were more likely than their counterparts to say that "visiting friends and relatives" was the most important motivation for their main holiday in 2010 (21% of the former and 19% of the latter said this, compared to 16% of respondents with average levels of education and 15% of the most educated). "City trips" were somewhat most popular among full-time students, while "culture and religion" were somewhat more frequently mentioned by the most educated.

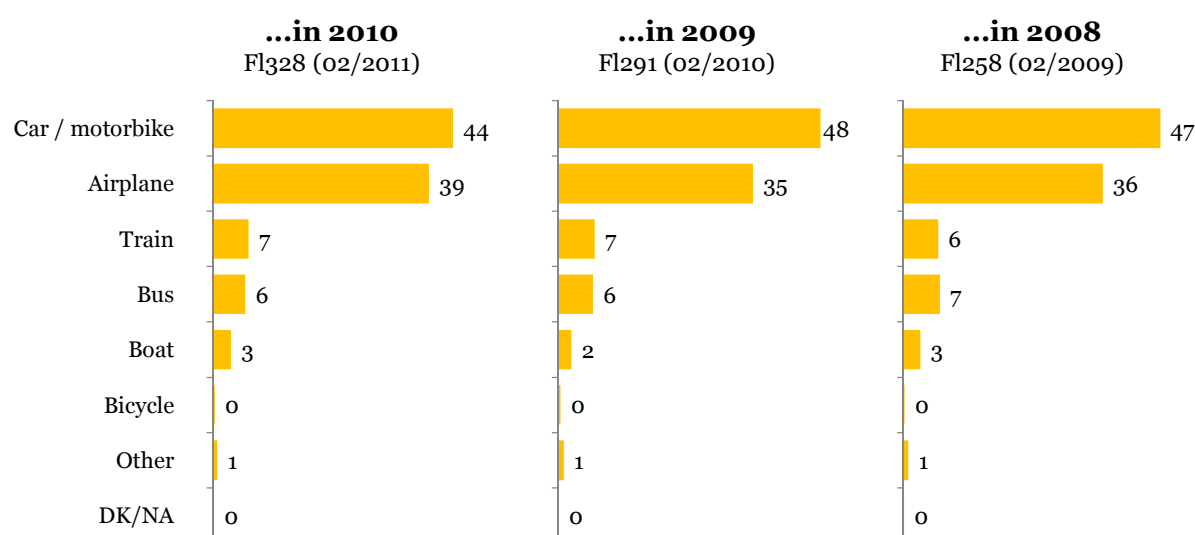
Non-working respondents were less likely to say that they were looking primarily for “rest and recreation” when they went on their main holiday in 2010 (30% vs. 39%-41% across other occupational categories), but they were somewhat more apt to say that they had been motivated by “culture/religion” (10% vs. 5%-7% across other occupational groups) or that they had wanted to visit a city (10% vs. 5%-7%). Non-working respondents, together with manual workers, also more frequently said that “visiting friends or relatives” had been the most important objective of their main holiday in 2010 (21% and 19%, respectively, compared to 12% of the self-employed and 14% of employees). Finally, manual workers and employees were more likely to say that they had wanted a “sun/beach” holiday (20% vs. 15% of non-working respondents and 17% of the self-employed).

For more details, see annex table 5b.

### 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%).

#### Method of transport for EU citizens' main holiday trip – EU27



Q6(2011-2010)/Q8(2009). How did you travel there in 2010/2009/2008?  
%, Base: respondents who made at least one holiday trip, EU27

#### Country variations

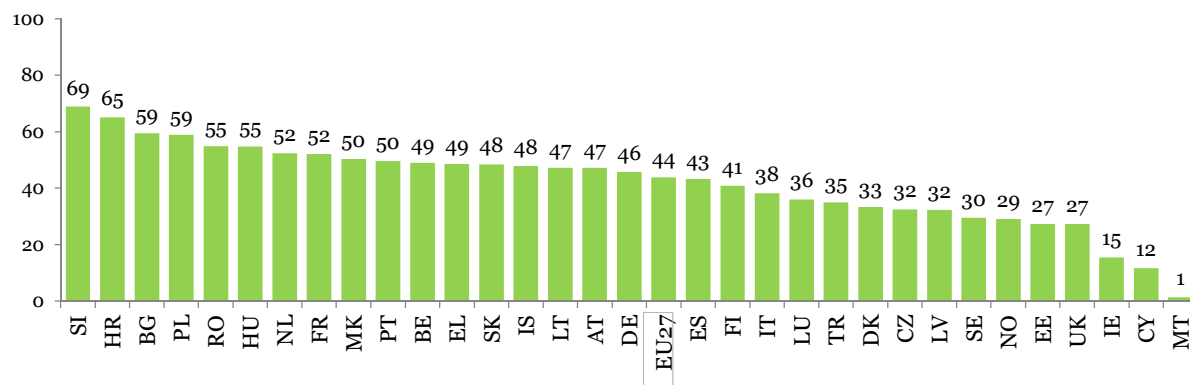
Slovenes and Croats were the most likely to have travelled by **car or motorbike** for their main holiday trip in 2010 (69% and 65%, respectively). Such a means of transport was also frequently used by respondents in Bulgaria and Poland (both 59%). Not surprisingly, these methods of transport were the least popular among holidaymakers from the smaller islands – Malta (1%) and Cyprus (12%) – and from Ireland (15%). As for holiday trips in 2008 and 2009, a large majority of holidaymakers in these countries travelled by **plane** for their main holiday in 2010: 86% in Cyprus, 82% in Malta and 77% in Ireland. In sharp contrast, roughly a tenth, or less, of Bulgarians (6%), Hungarians (7%) and Romanians (11%) had taken a flight to go on holiday in 2010.

The most important changes – from 2009 to 2010 – in the methods of transport used for holidays have taken place in Iceland; this country has seen a decrease of 19 percentage points in the proportion of holidaymakers who had travelled by car or motorbike and an increase of 17 percentage points in the



proportion who took a flight to go on holiday). Similar – although smaller – changes were seen in Lithuania (-13 points for “car/motorbike” and +13 points for “by plane”), Portugal (-11 points and +11 points, respectively), France (-10 points and +10 points, respectively), Estonia (-10 points and +16 points, respectively) and Cyprus (-10 points and +12 points, respectively).

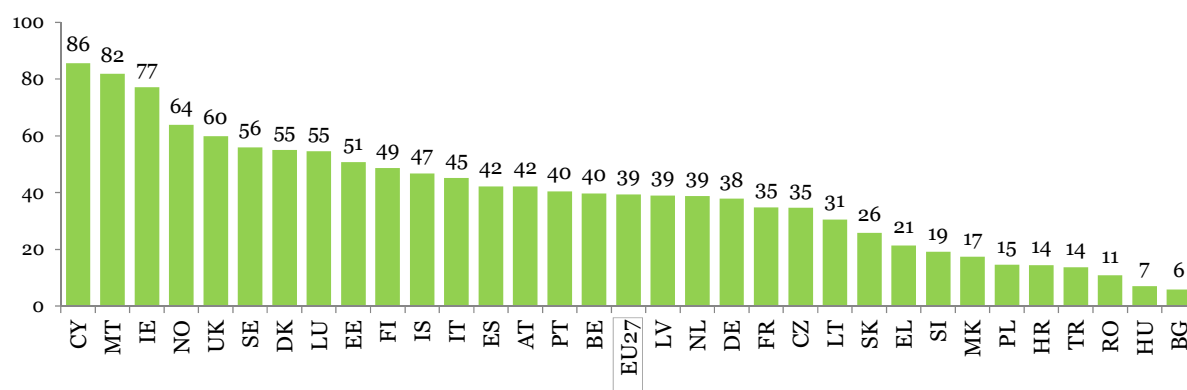
#### Method of transport: **car or motorbike**



**Q6. How did you travel there in 2010?**

%, Base: respondents who made at least one holiday trip in 2010, by country

#### Method of transport: **airplane**



**Q6. How did you travel there in 2010?**

%, Base: respondents who made at least one holiday trip in 2010, by country

As in previous surveys, holidaymakers from Greece (20%) – with its many islands – and Malta (16%) were the most likely to have reached their holiday destination **by boat**. In Italy and Estonia, 8% of holidaymakers had travelled by boat; in almost all other countries, however, this proportion was less than 5%.

Holidaymakers from Hungary (23%), Romania (21%), Bulgaria (14%) and Poland (11%) were the most likely to have travelled to their main holiday destination **by train**. In sharp contrast, virtually no Cypriots, Maltese, Turkish holidaymakers or Icelanders had travelled by train. In Hungary, the proportion of holidaymakers who had travelled to their main holiday destination by train has increased (+13 points) at the expense of those travelling by car or motorbike (-12 points).

Finally, **buses** were once again most frequently chosen by Turkish holidaymakers (50%), followed by those from the former Yugoslav Republic of Macedonia (28%), the Czech Republic (22%), Bulgaria and Slovakia (both 19%); however, virtually none of the respondents in Ireland, Iceland, Malta and Cyprus had travelled by bus.

For details see annex table 6a.

### ***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.

The youngest and oldest holidaymakers were more likely to have gone on holiday by train or bus. For example, 10% of 15-24 year-olds and 8% of the over 54s had travelled to their main holiday destination by train, compared to 4%-5% of 25-54 year-olds. Taking the train was also more popular among full-time students (10% vs. 5%-7% across other educational groups), manual workers and non-working respondents (8%-9% vs. 3% of the self-employed and 5% of employees), while the bus was more frequently chosen by non-working respondents (10% vs. 2%-5% across other occupational groups) and respondents with the lowest level of education (13% vs. 3% of respondents with the highest level of education).

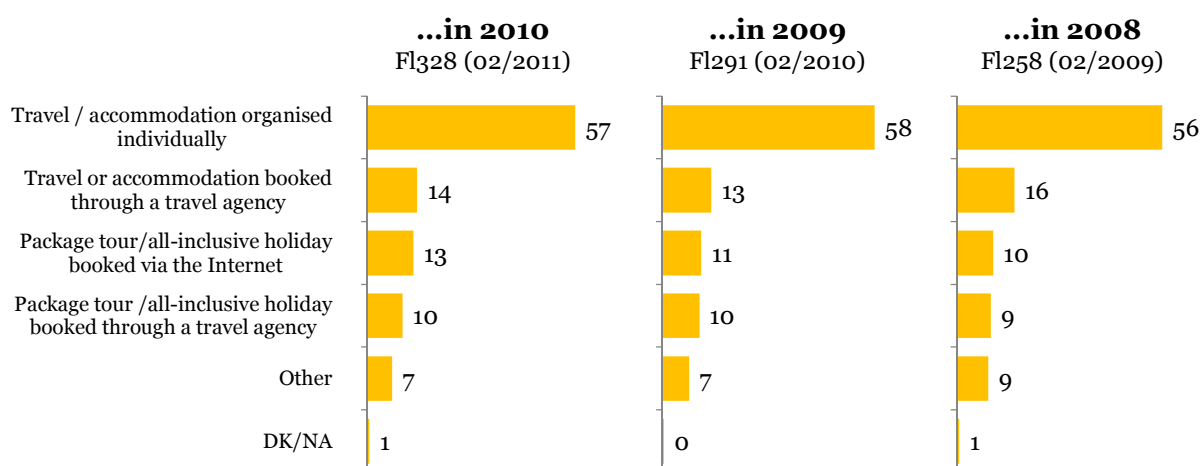
Flights tended to be chosen more frequently by respondents with the highest level of education (42% vs. 34% of the least educated respondents), urban and metropolitan residents (41%-43% vs. 36% of rural residents), employees and self-employed respondents (44%-45% vs. 25% of manual workers and 36% of non-working respondents).

For details see annex table 6b.

### ***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**



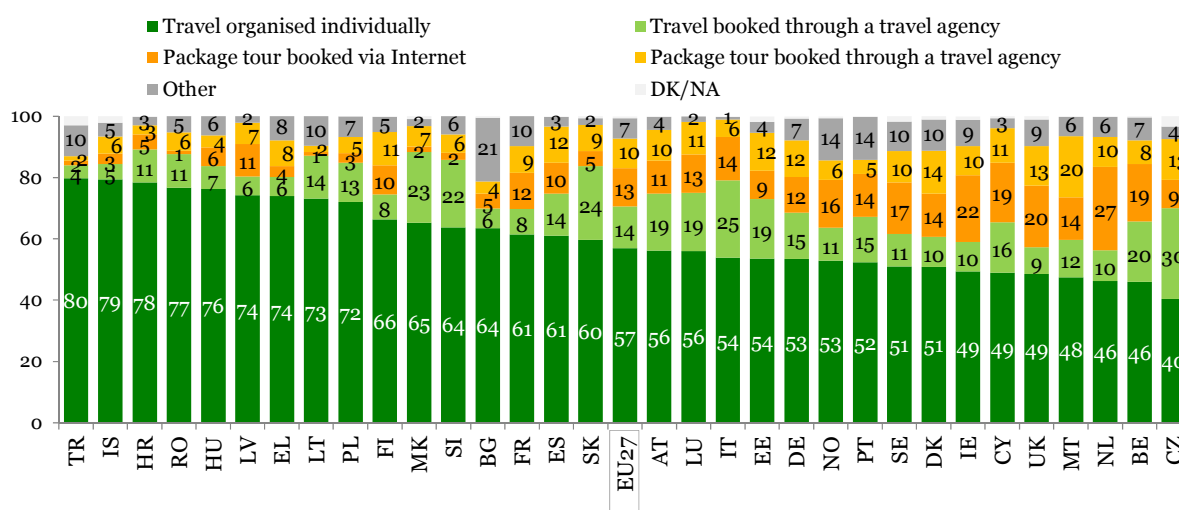
Q7(2011-2010)/Q10(2009). How did you organize your main holiday trip in 2010/2009/2008?  
%, Base: respondents who made at least one holiday trip, EU27

## 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.

As in the previous wave of the survey, holidaymakers from the Czech Republic were the most likely to have used a **travel agency to book travel or accommodation** for their main holiday trip (30%). Interviewees in the Netherlands were the most likely to say that they had booked a package tour or all-inclusive holiday via the Internet (27%), while those in Malta were the most likely to have booked a package tour or all-inclusive holiday through a travel agency (20%).

## How respondents organised their main holiday trip in 2010



**Q7. How did you organize your main holiday trip in 2010?**

%, Base: respondents who made at least one holiday trip in 2010, by country

In 2009, holidaymakers from Italy, Bulgaria, Sweden, Cyprus and the former Yugoslav Republic of Macedonia were considerably less likely to have organised their main holiday individually. For example, 69% of holidaymakers from Italy had personally organised their main holiday in 2009; the corresponding figure for 2010 was 54% (-15 percentage points). The opposite development was most noticeable in Romania: in this country, the proportion of holidaymakers who have organised their travel individually increased from 59% in 2009 to 77% in 2010 (+18 percentage points).

### Differences by type of holiday<sup>8</sup>

As in the previous waves, trips to visit relatives and friends, and recreation/wellness holidays were most frequently organised by the respondents themselves (76% and 58%, respectively). By comparison, 48% of sun/beach holidays and the same number of cultural trips were organised in such a way.

A sixth of holidaymakers, who had opted for a sun/beach holiday, had booked travel or accommodation through a travel agency and about 3 in 10 (in total) had booked a package tour or an all-inclusive holiday via a travel agency (14%) or through the Internet (17%). The corresponding proportions for vacations with an accent on culture were not markedly different (except for less use of the Internet): 17%, 14% and 13%, respectively.

#### How respondents organised their main holiday trip (Column %)

	Focus of the main holiday											
	Social			Recreation/ Wellness			Sun/Beach			Culture		
	in 2008	in 2009	in 2010	in 2008	in 2009	in 2010	in 2008	in 2009	in 2010	in 2008	in 2009	in 2010
Travel / accommodation organised individually	71	75	76	58	61	58	47	45	48	47	50	48
Travel or accommodation booked through a travel agency	9	8	7	15	13	13	19	16	17	21	17	17
Package tour/All Inclusive holiday booked via the Internet	6	8	7	10	10	13	13	14	17	10	10	14
Package tour/ All Inclusive holiday booked through a travel agency	3	2	2	8	8	10	14	18	14	13	15	13
Other	10	7	8	9	7	6	6	6	4	8	8	8

Q5(2011-2010)/Q6(2009). What was the major motivation for your main holiday trip in 200x?  
Q7(2010)/Q10(2009). How did you organize your main holiday trip in 200x?  
%, Base: respondents who made at least one holiday trip, EU27 (DK/NA not shown)

### 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).

The over 54 year-olds and holidaymakers with the lowest level of education were more likely than their counterparts to have used a travel agency to book travel or accommodation. For example, 18% of the least-educated respondents had booked their travel or accommodation through a travel agency, compared to 12% of those with the highest level of education. The oldest respondents were also more likely to book a package tour or all-inclusive holiday with a travel agency (13% vs. 7%-9% across other age groups).

<sup>8</sup> For further analysis, this report will feature **four groups of holidaymakers** based on the main focus/objective of their 2010 holiday (see section 3.1). These objectives can be summarised as holidays that have:

- a *recreational* focus (i.e. to rest, enjoy nature, go to wellness centre/health spa, etc.)
- an emphasis on going to the *beach* or “*going to the sun*”
- an accent on *culture* (making city trips, going to events or specifically looking for opportunities to meet people of different cultures or religions)
- primarily – a *social context* – where the main goal is visiting family or friends.

Finally, the oldest respondents, those with the lowest level of education and non-working respondents were the least liable to have booked package tours and all-inclusive holidays via the Internet. For example, 8% of the over 54 year-olds had booked a package tour or all-inclusive holiday via the Internet; this proportion was twice as high among the younger age groups (14%-16%).

For more details, see annex table 7b.

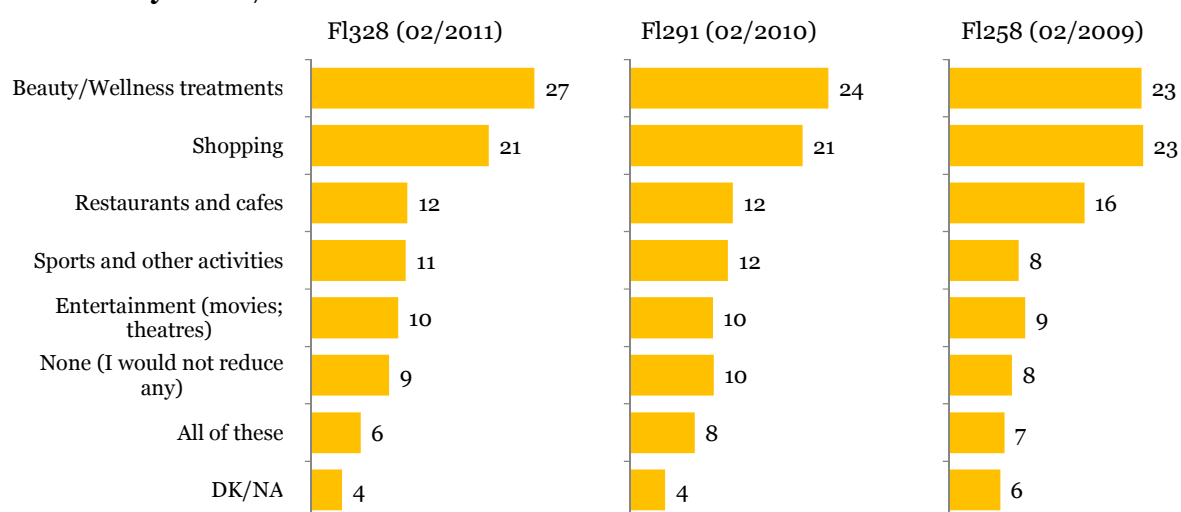
## 4. Financial aspects: types of holiday leisure activities that would be given up first

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

### Country variations

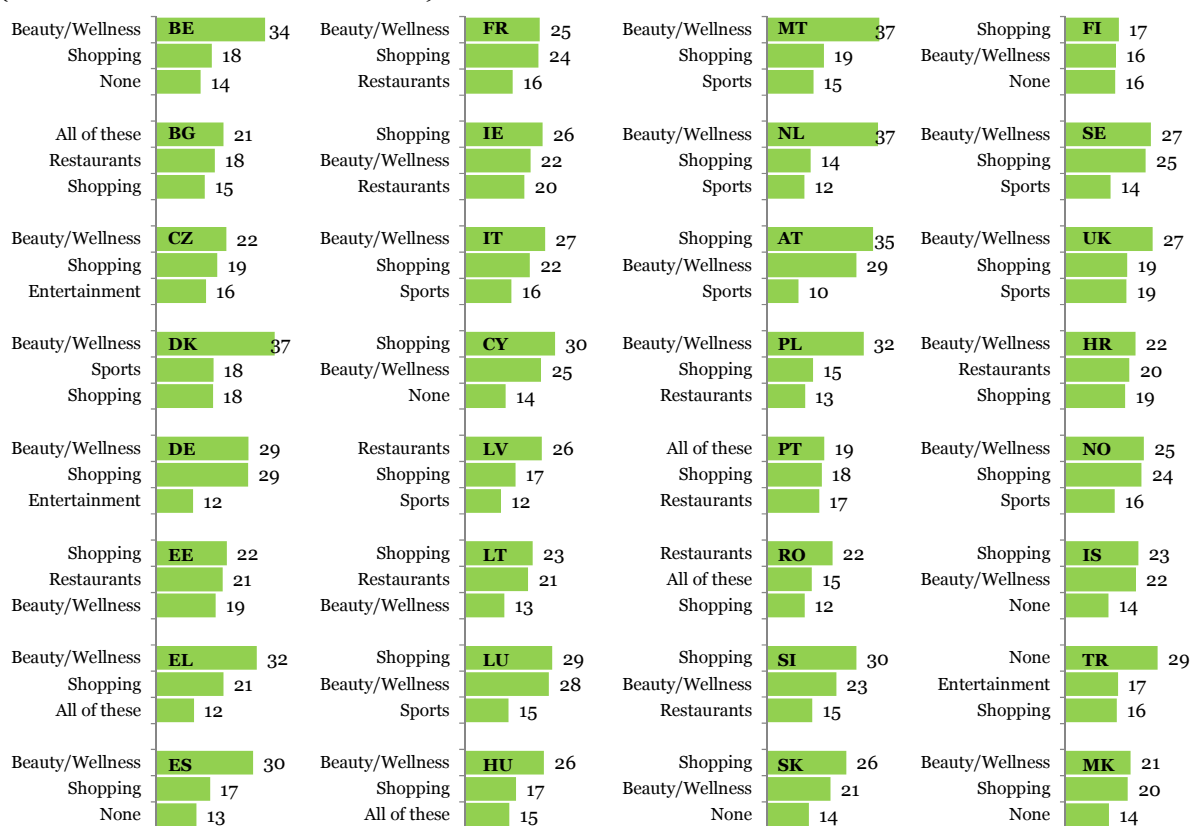
The chart on the following page shows – for each country – the most frequently mentioned holiday leisure activities that respondents would give up first if savings were needed when they were actually on holiday.

Interviewees in a majority of countries surveyed selected the same leisure activities: they were most willing to reduce or give up **beauty or wellness treatments** and **shopping**. For example, 34% of Belgian respondents selected “beauty or wellness treatments” (first position) and 18% mentioned “shopping” (second position). Similarly, 30% of respondents in Slovenia would reduce or give up shopping (first position) and 23% said the same about beauty or wellness treatments (second position).

In Latvia and Romania, reducing visits to **restaurants and bars** was selected by the largest proportion of respondents (26% and 22%, respectively). In a further nine countries, this type of leisure activity ranked among the three most frequently mentioned that respondents would give up to save money while on holiday (without ever being selected by the largest proportion of respondents). For example, 26% of respondents in Ireland would reduce or give up shopping (first position), 22% said the same

about beauty or wellness treatments (second position) and 20% opted to give up visits to restaurants and bars (third position).

### Holiday leisure activities that respondents would reduce most to save money when on holiday (three most mentioned leisure activities)



Q8. When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?  
%, Base: all respondents, by country

**Sports and other activities** appeared in the top three of the most mentioned leisure activities (to be given up) in 10 countries; for example, this type of activity was selected by 19% of interviewees in the UK (third position) and 18% in Denmark (second position). Saving money on **entertainment**, however, appeared among the three most mentioned activities in just three countries: Turkey (17%, third position), the Czech Republic (16%, third position) and Germany (12%, third position).

Respondents in Bulgaria and Portugal were most likely to say that they would **reduce all of these activities** when trying to save money while on holiday (21% and 19%, respectively). “Reducing all types of activities” was also in the top three of most mentioned responses in Greece (12%), Hungary (15%) and Romania (15%).

Finally, 29% of Turks said they would **reduce none of the listed leisure activities** (first position). This option was also among the most frequently mentioned responses in Spain, Belgium, Cyprus, Slovakia, Iceland and the former Yugoslav Republic of Macedonia (all 13%-16%),

### Socio-demographic considerations

Older respondents, those with the lowest level of education, manual workers and non-working respondents were more likely than their counterparts to say that they would give up or reduce all types of activities when trying to save money while on holiday. For example, 13% of those with the lowest level of education gave this response, compared to 4% of the most educated. Interestingly, the over 54 year-olds were also more liable to say that they would reduce none of the listed leisure activities (12% vs. 6% of 15-24 year-olds).

Younger respondents, and those still in education, were more likely to say they would be willing to reduce spending on entertainment while on holiday. For example, 16% of full-time students would give up or reduce spending on this type of leisure activity, compared to 9%-11% of respondents who had completed their education.

It was also noted that the higher the respondents' level of education, the more likely they were to be willing to reduce spending on beauty/wellness treatments. For example, while 18% of respondents with the lowest level of education selected "beauty/wellness treatments", this proportion increased to 32% for respondents with the highest level of education and 31% of full-time students. Respondents with the highest level of education were also somewhat more likely to say that they would reduce spending on shopping (23% vs. 19% of the least educated).

Women, the over 54 year-olds, manual workers and non-working respondents, on the other hand, were less willing than their counterparts to reduce spending on beauty and wellness treatments. Women, however, were more likely than men to say they would spend less on sports and other activities (13% vs. 9% of men).

For further details, see annex table 8b.



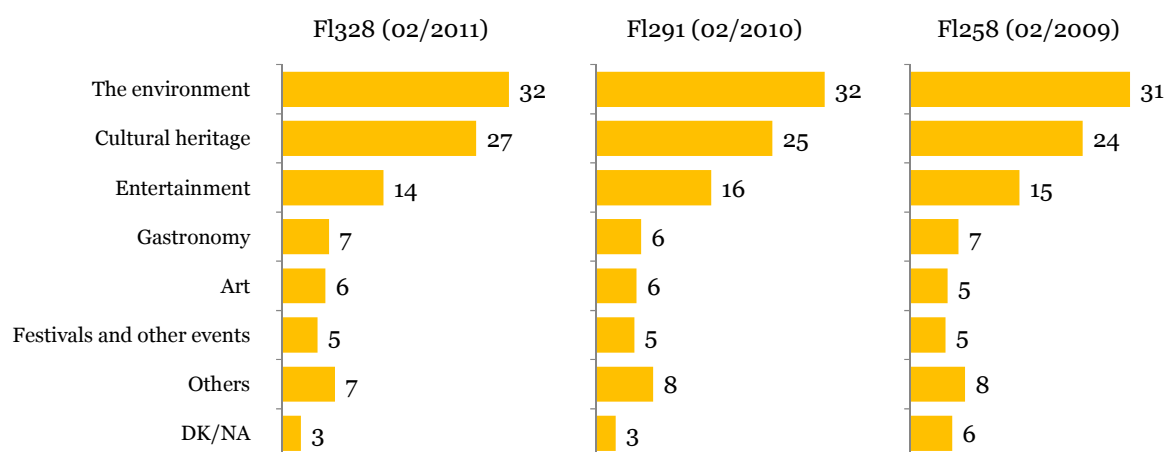
## 5. Considerations when planning a holiday and choosing a destination

### 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.

**Gastronomy, arts and festivals** (or other events) were each considered to have a major influence on holiday decisions by 5%-7% of EU citizens. Seven percent cited other attractions than the ones listed in the survey as key considerations when choosing a holiday destination and 3% had nothing to say (i.e. they gave a “don't know” response or would not say). The ranking of attractions listed in the survey remained the same across the three waves of the survey.

#### Attractions influencing the choice of destination – EU27

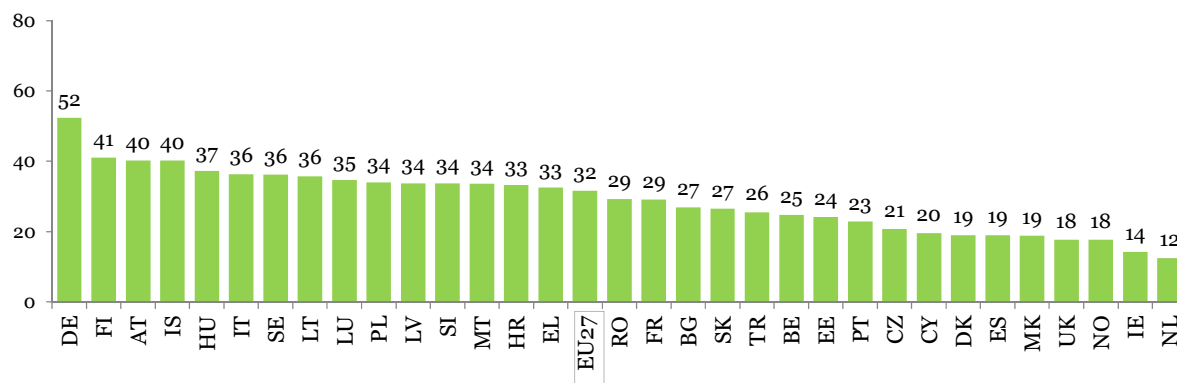


Q12(2011-2010)/Q20(2009). From the following attractions, please choose the one that has the major influence on your choice of destination?  
%, Base: all respondents, EU27

## Country variations

The proportions of respondents who named **the location's environment** (e.g. its overall attractiveness) as the key consideration when choosing a holiday destination were the lowest in the Netherlands (12%) and Ireland (14%) and the highest in Germany (52%). In Finland, Austria and Iceland, about 4 in 10 (40%-41%) named the location's overall attractiveness.

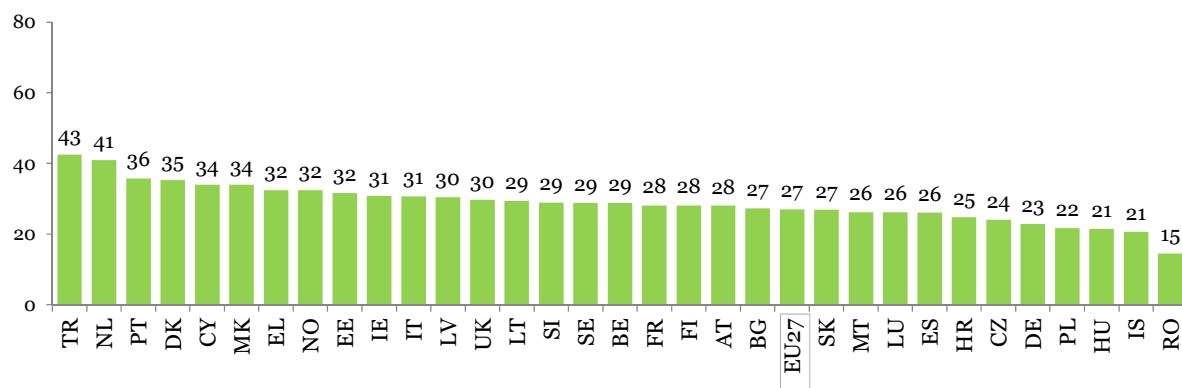
### Attractions influencing the choice of destination: **the environment**



Q12. From the following attractions, please choose the one that has the major influence on your choice of destination?  
%, Base: all respondents, by country

Although Dutch respondents were among the least likely to consider the location's environment as an important factor when choosing a holiday destination, they were among the most likely to name **cultural heritage** in this context (41%). Respondents in Turkey were the most likely to choose cultural heritage (43%). In sharp contrast, only 15% of Romanians named this as an important factor.

### Attractions influencing the choice of destination: **cultural heritage**



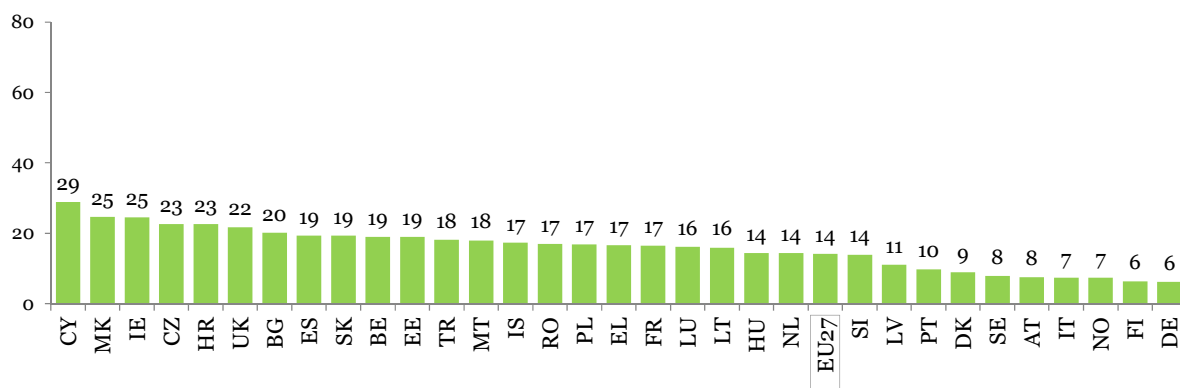
Q12. From the following attractions, please choose the one that has the major influence on your choice of destination?  
%, Base: all respondents, by country

The proportion of interviewees who answered that **the options for entertainment** influenced their choice of destination remained below 30% across all countries surveyed; ranging from 6% in Germany and Finland to 29% in Cyprus.

As in the previous waves of this survey, in most countries, respondents most frequently selected the same two attractions, i.e. the location's environment and cultural heritage; Cyprus, the former Yugoslav Republic of Macedonia, Ireland and the UK were the most notable exceptions. In these countries, "options for entertainment" ranked higher than "the location's environment" (Cyprus: 29%

vs. 20%; the former Yugoslav Republic of Macedonia: 25% vs. 19%; Ireland: 25% vs. 14%; the UK: 22% vs. 18%).

### Attractions influencing the choice of destination: **entertainment**



Q12. From the following attractions, please choose the one that has the major influence on your choice of destination?

%, Base: all respondents, by country

All other attractions were listed by less than 10% of respondents in almost all countries. In Italy and Spain, however, 11%-12% of respondents selected “arts” as having a major influence on holiday decisions. Similarly, 10%-12% of interviewees in Belgium, Luxembourg and Spain selected “gastronomy”, while 10% of Romanian and Irish respondents named “festivals and other events”. Finally, respondents in Norway frequently named other attractions than the ones listed in the survey (22%).

For more details, see annex table 13a.

### *The influence of various types of attractions vs. the objectives of respondents’ main 2010 holiday*

Analysing the importance of the various attractions by EU citizens’ main objective of their 2010 holiday<sup>9</sup>, clear differences emerged across various holidaymaker segments in terms of which kind of attractions were important.

As in the previous waves of this survey, the destination’s overall environment had most influence on their decisions for those whose main holiday had been a sun/beach holiday and for those where recreation/wellness had been the focus (34% and 38%, respectively). On the other hand, this was less important for holidaymakers who had visited friends and family (i.e. holidays with a social focus) or for those who had wanted a cultural experience (27% and 24%, respectively). Not unexpectedly, the latter respondents were most likely to name cultural heritage as the key consideration (41%, compared to, for example, 19% of those who had wanted a sun/beach holiday).

Furthermore, the destination’s options for entertainment were selected by 20% of holidaymakers whose main holiday had been a sun/beach holiday, compared to only half as many holidaymakers who had wanted a cultural experience (9%).

<sup>9</sup> i.e. the categories derived from the replies given to the question that asked what had motivated respondents to make a particular choice of destination (Q5), as discussed in section 3.3.

**Attractions influencing the choice of destination**

(Column %)

	Focus of the main holiday											
	Social			Recreation/ Wellness			Sun/Beach			Culture		
	in 2008	in 2009	in 2010	in 2008	in 2009	in 2010	in 2008	in 2009	in 2010	in 2008	in 2009	in 2010
The environment	26	29	27	38	36	38	32	34	34	24	28	24
Cultural heritage	27	26	30	23	25	26	18	17	19	42	39	41
Entertainment	15	16	14	14	16	14	24	22	20	9	10	9
Gastronomy	7	6	6	8	6	5	7	7	7	5	4	5
Art	5	7	7	5	4	4	3	3	3	8	7	8
Festivals & other events	6	6	6	4	4	4	5	5	6	6	6	5
Others	10	8	8	8	8	8	9	12	8	4	6	7

Q5 (2011-2010)/Q6 (2009). What was the major motivation for your main holiday trip in 200x?  
 Q12(2011-2010)/Q20(2009). From the following attractions, please choose the one that has the major influence  
 on your choice of destination?

%, Base: respondents who made at least one holiday trip, EU27 (DK/NA not shown)

***Socio-demographic considerations***

Younger respondents (and full-time students) were more likely than their older counterparts to name entertainment, and festivals and other events, as having a major influence on their decisions about a holiday destination; however, they were less likely to mention the location's environment and cultural heritage. For example, 29% of 15-24 year-olds answered that options for entertainment were important when choosing a holiday destination; this proportion decreased to 7% for the over 54 year-olds.

Looking at respondents who had completed their education, 35% of those with the highest level of education said "cultural heritage" was a major influence when choosing a holiday destination, compared to 24%-25% of respondents with low and average levels of education. The latter groups were more inclined to mention "gastronomy" than the former segment (8%-9% vs. 5%). Furthermore, those with the lowest level of education were more likely to say that they did not know which attractions would have a major influence on their choice of destination (7% vs. 1% of the highly educated).

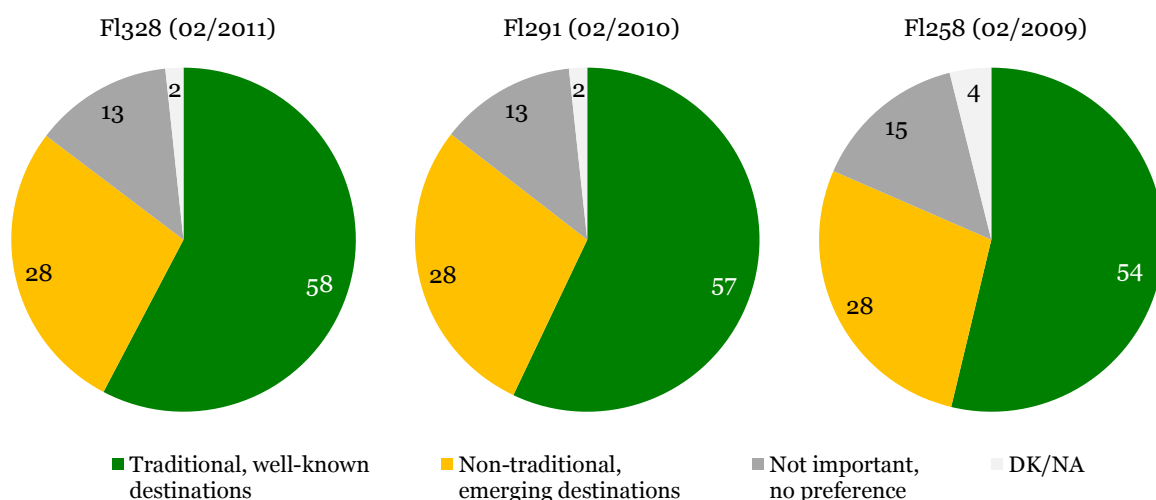
Respondents living in rural areas and manual workers were also considerably less likely than their counterparts to be attracted by the cultural history of a holiday destination (24% and 19%, respectively – compared to, for example, 31% of metropolitan residents and 29% of employees). Manual workers were, nevertheless, somewhat more likely to name options for entertainment or the location's environment as a key consideration. For example, the latter was mentioned by 37% of manual workers, compared to 30%-32% of respondents in other occupational groups.

For more details, see annex table 13b.

## 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 report). 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



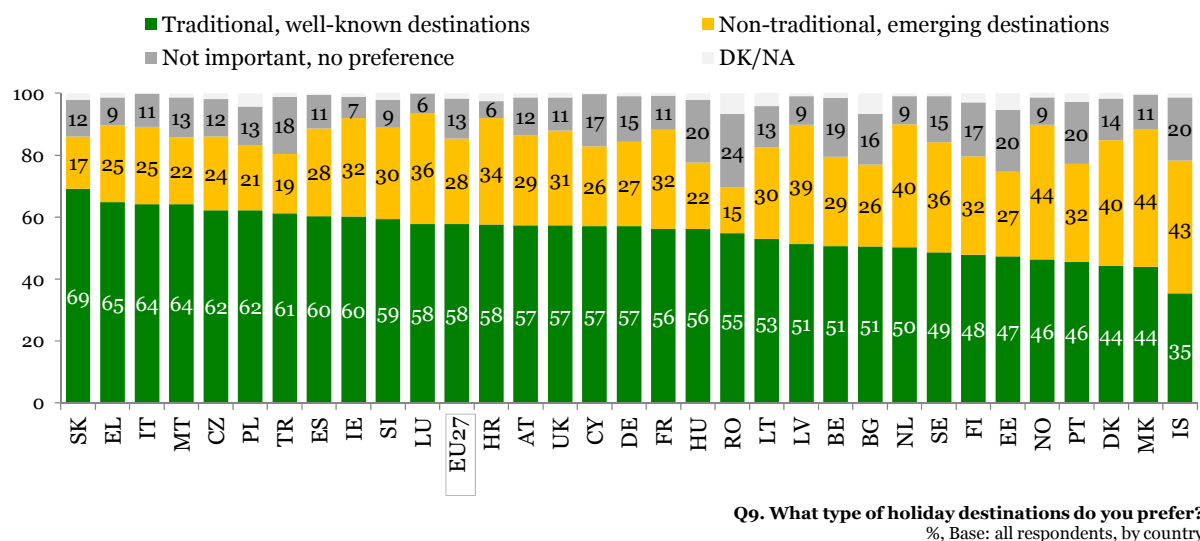
Q9(2011-2010)/Q17(2009). What type of holiday destinations do you prefer?  
 %, Base: all respondents, EU27

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%). In the former Yugoslav Republic of Macedonia, respondents were just as likely to prefer “emerging” to “traditional” destinations (both 44%). The corresponding proportions for Norway were 44% and 46%, respectively.

Finally, about a quarter of Romanians (24%) and about a fifth of respondents in Belgium, Portugal, Estonia, Iceland and Hungary (19%-20%) answered that they had no preference for a particular type of destination.

## Preferred holiday destinations



A comparison between 2010 and 2011 results showed the largest increase in the preference for “alternative or emerging” tourist destinations in the former Yugoslav Republic of Macedonia; in 2010, 36% respondents from this country said they preferred to visit emerging destinations; however, in 2011, this proportion has increased to 44% (+8 percentage points). Conversely, the proportion of those who could not – or did not want to – specify a preference decreased from 18% in 2010 to 11% in 2011 (-7 points). The proportion of respondents who preferred going “off the beaten track” has also seen a notable increase in Portugal (from 25% in 2010 to 32% in 2011; +7 percentage points), Norway (from 38% to 44%; +6 points) and Iceland (from 37% to 43%; +6 points).

An opposite trend was seen in Latvia, Italy and Croatia; these countries have seen an increase – from 2010 to 2011 – in the proportion of respondents with a preference for traditional tourist destinations, at the expense of those giving a “don’t know” response. For example, in 2010, 41% of interviewees in Latvia preferred to spend their holidays in conventional tourist destinations; this proportion increased to 51% in 2011 (+10 percentage points). Conversely, the proportion of Latvians who could not – or did not want to – specify a preference decreased from 18% in 2010 to 9% in 2011 (-9 points)

### 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).

Conversely, interviewees who preferred traditional destinations were more likely to be older (60%-61% of those aged over 39 vs. 50% of 15-24 year-olds), to have the lowest level of education (65% vs. 53% of respondents with the highest level of education), to be manual workers or non-working respondents (59%-60% vs. 55%-56% of self-employed respondents and employees).

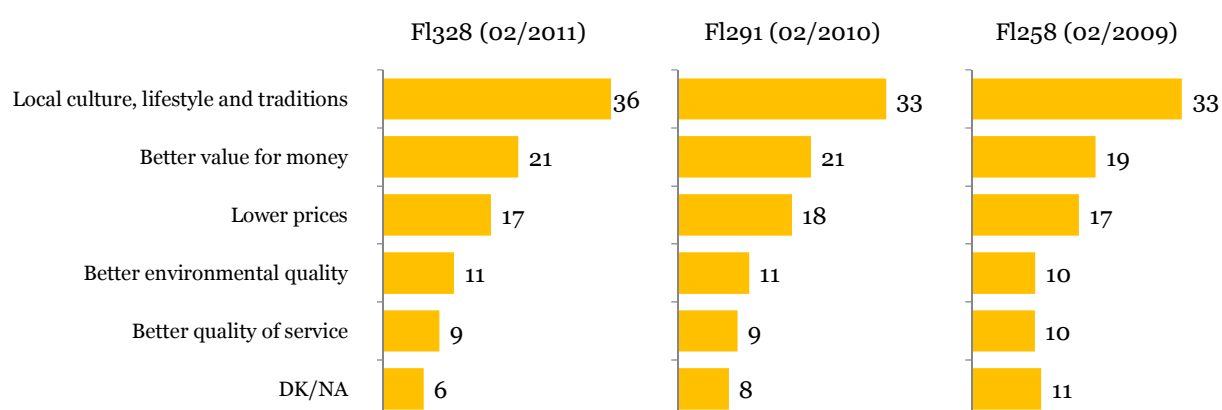
For more details, see annex table 9b.

### 5.3 Anticipated benefits of emerging destinations

Irrespective of respondents' preferences (see section 5.2), 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



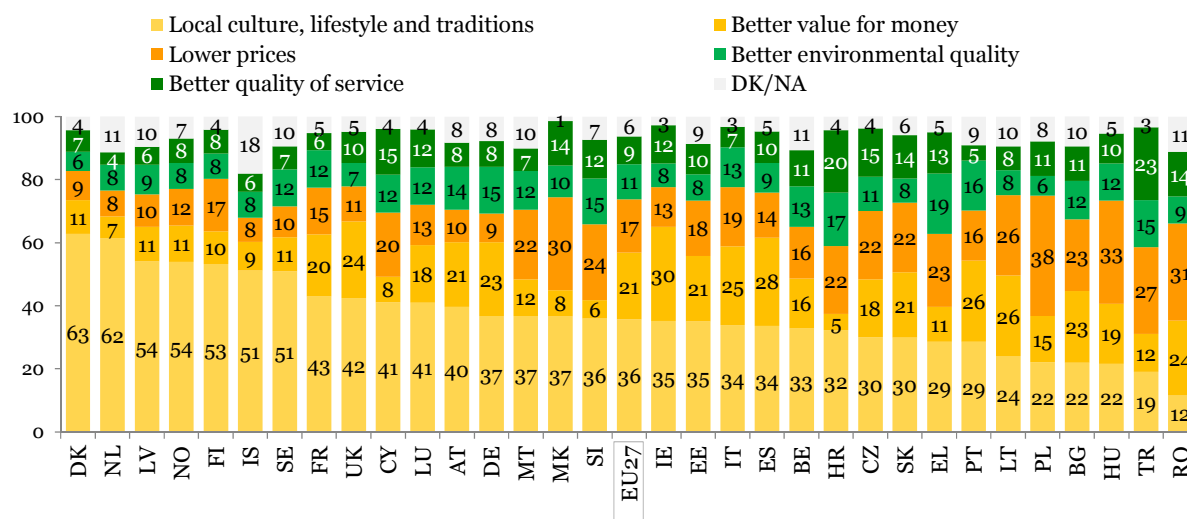
Q10(2010&2011)/Q18(2009). What would be your main expectation from a non-traditional, emerging destination?  
%, Base: all respondents, EU27

#### 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”. The proportions of respondents who said that a better quality of service would be the primary expectation were the highest in Turkey (23%) and Croatia (20%), while environmental concerns (e.g. a less polluted environment) were most frequently mentioned by respondents in Greece (19%).

## The main expectation from a non-traditional, emerging destination



Q10. What would be your main expectation from a non-traditional, emerging destination?  
%, Base: all respondents, by country

## 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%).

### Main expectations from an emerging destination (Column %)

	Preferred holiday destinations					
	Traditional, well-known			Non-traditional		
	2009	2010	2011	2009	2010	2011
Local culture, lifestyle and traditions	28	28	31	48	45	49
Better value for money	21	21	23	17	20	18
Lower prices	20	21	20	11	12	11
Better environmental quality	10	11	11	12	12	13
Better quality of service	11	11	10	8	7	7

Q9. What type of holiday destinations do you prefer?  
Q10. What would be your main expectation from a non-traditional, emerging destination?  
%, Base: all respondents, EU27 (DK/NA not shown)

## 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.

Respondents with a low or average level of education, non-working respondents and manual workers were more liable to expect lower prices in emerging destinations. For example, “lower prices” would



be the primary expectation of 25% of respondents with the lowest level of education, when considering non-traditional travel destinations; the corresponding proportion for respondents with the highest level of education was 10%.

Finally, the oldest respondents, those with the lowest level of education and non-working respondents were more likely than their counterparts to say that they did not know what to expect from emerging destinations (9%-12%, compared to an EU average of 6%).

For more details, see annex table 10b.

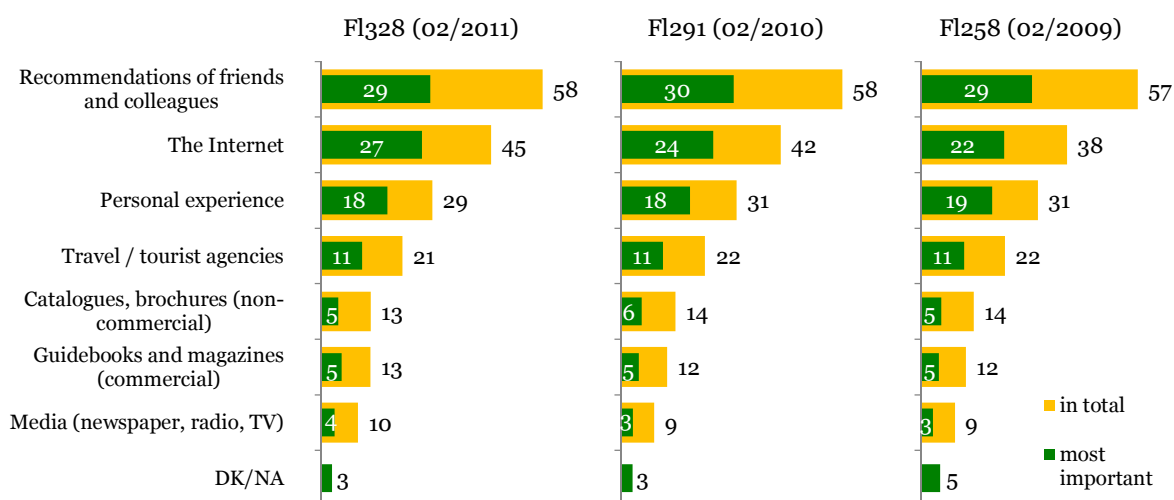
## 5.4 Sources of information used when making holiday plans

When EU citizens were asked to define the *primary information source* they used when making decisions about travel and holiday plans, they opted for **recommendations of friends and colleagues**; as in 2010, roughly 3 in 10 (29%) respondents chose this source. Just over a quarter (27%) said they looked for information on **the Internet** and 18% mentioned **personal experience**. About 1 in 10 (11%) EU citizens considered that **travel/tourist agencies** were the best sources. A smaller number of interviewees chose each of the other sources listed in the survey (all 4%-5%).

Respondents were also asked what they would choose *as the second most important source*. Adding up the percentages of the *first* and *second* selections, the above ranking of information sources remained the same at the EU level. 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. Using the same logic, 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



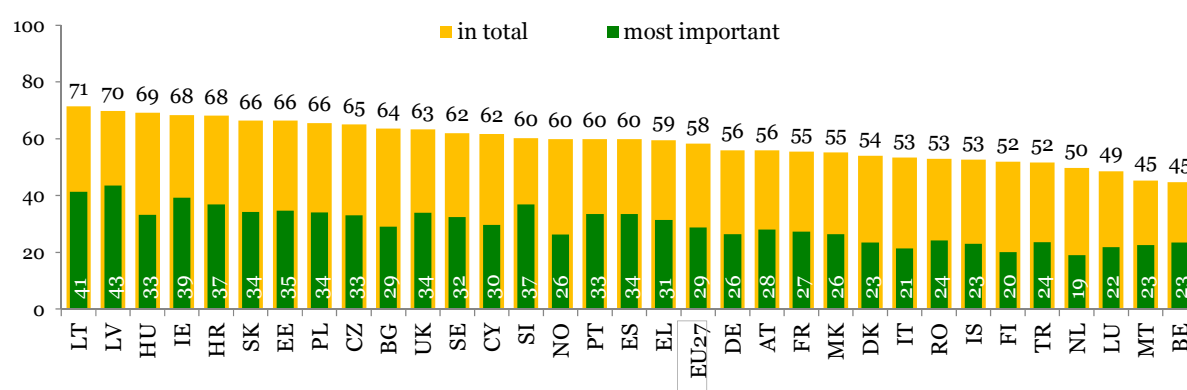
Q11a(2011-2010)/Q19a(2009). From the following information sources, which one do you consider to be the most important when you make a decision about your travel (/holiday) plans?  
Q11b(2011-2010)/Q19b(2009). And what is the second most important?  
%, Base: all respondents, EU27, DK/NA shown for the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

In the following sections, variations by countries and socio-demographic groups are studied, based on the *total percentages* of respondents who indicated that a particular source was their first or second most important source of information when making decisions about travel and holiday plans.

### Country variations

The main source of information when making decisions about travel and holiday plans was considered to be **recommendations from friends and family** by a majority of respondents in 28 of the 32 countries surveyed. Such word-of-mouth recommendations were most frequently mentioned in Lithuania, Latvia, Hungary, Ireland and Croatia: roughly 7 in 10 respondents in these countries referred to this source in the first or the second place (68%-71%). In Belgium and Malta, on the other hand, just 45% of interviewees considered recommendations from friends and family to be an important source of information when making holiday plans.

#### Information source: **recommendations of friends and colleagues**

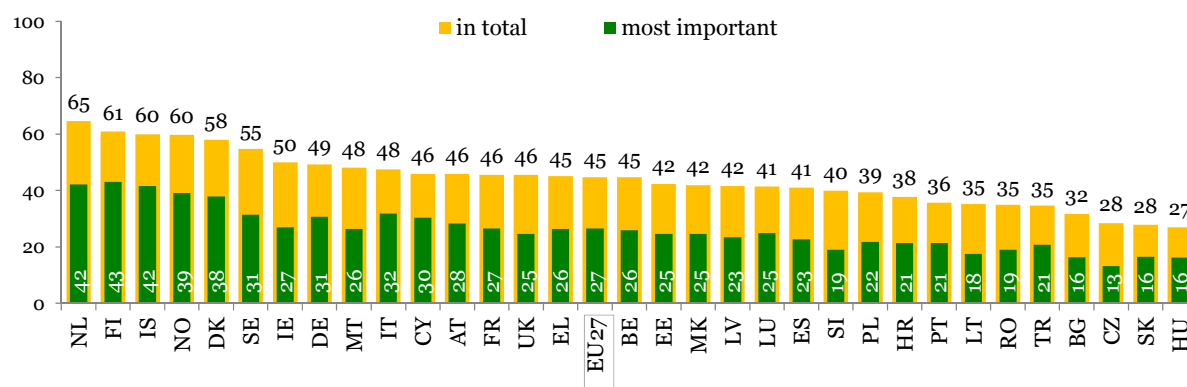


Q11a. From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?  
Q11b. And what is the second most important?  
%, Base: all respondents, by country

As to the relevance of **the Internet** as an information source in holiday planning, the survey showed that a majority of respondents in the Netherlands (65%), Finland (61%), Iceland and Norway (both 60%), Denmark (58%) and Sweden (55%) considered the Internet to be a valuable asset. In Hungary, Slovakia, the Czech Republic and Bulgaria, on the other hand, less than a third of respondents referred to Internet-based information (27%-32%).<sup>10</sup>

The most notable increases – from 2010 to 2011 – in the share of respondents who said that the Internet was their most or second most important source of information when making holiday plans were seen in Croatia (from 27% in 2010 to 38% in 2011; +11 percentage points), the former Yugoslav Republic of Macedonia (from 32% to 42%; +10 points) and Latvia (from 33% to 42%; +9 points). In Luxembourg, on the other hand, the share of respondents mentioning the Internet dropped from 50% in 2010 to 41% in 2011 (-9 percentage points).

<sup>10</sup> Note: the penetration of Internet/broadband access is, of course, closely related to the proportion of people who could use it when planning a holiday or “short trip”.

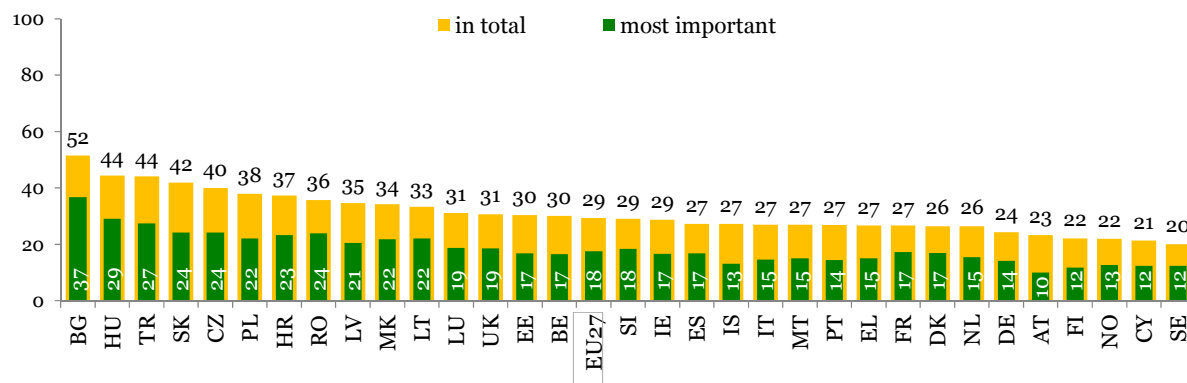
Information source: **Internet**

Q11a. From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?

Q11b. And what is the second most important?

%, Base: all respondents, by country

Making holiday decisions based on **personal experience** was most widely seen in Bulgaria (52%). In addition, more than 4 in 10 respondents in Hungary and Turkey (both 44%) and Slovakia (42%) selected this option as the first or second most important element when making holiday plans. In the six countries at the right-hand side of the chart, however, less than a quarter of respondents gave a similar response: Sweden (20%), Cyprus (21%), Norway and Finland (both 22%), Austria (23%) and Germany (24%).

Information source: **personal experience**

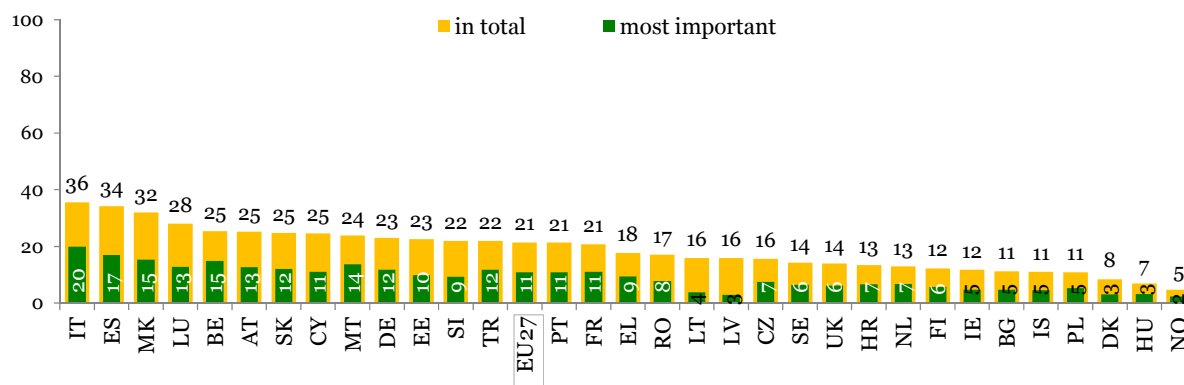
Q11a. From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?

Q11b. And what is the second most important?

%, Base: all respondents, by country

Roughly a third of respondents in Italy (36%), Spain (34%) and the former Yugoslav Republic of Macedonia (32%) considered that **travel/tourist agencies** were the best sources when making holiday plans. In more than half of the countries surveyed, travel and tourist agencies were mentioned by less than a quarter of respondents; respondents in Norway (5%), Hungary (7%) and Denmark (8%) were the least likely to select this source.

#### Information source: **travel and tourist agencies**



Q11a. From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?  
Q11b. And what is the second most important?  
%, Base: all respondents, by country

More than a fifth of respondents in Slovenia (25%), Luxembourg and Belgium (both 21%) said that **non-commercial catalogues or brochures** (e.g. those of a regional tourism association) were an important source of information when making a decision about travel plans. On the other hand, only 1 in 20 respondents in Lithuania and Romania gave a similar response.

**Commercial guidebooks and travel magazines** were selected as a main source of information to be used when planning a holiday by between 16% and 19% of respondents in Luxembourg, Hungary, the UK, Cyprus, Greece and the Czech Republic, but by no more than 6% of respondents in Bulgaria, Spain, Croatia and the former Yugoslav Republic of Macedonia.

Finally, the proportion of respondents who said that their main source of information when making decisions about holidays and travel plans were **media** products and programmes ranged from 6% in the Czech Republic, Italy and Slovakia to 18%-20% in Norway, the former Yugoslav Republic of Macedonia, Finland and Romania.

For more details, see annex tables 11a and 12a.

#### **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).

**Information sources when deciding about holidays**

(column %, first and second choice combined)

	Focus of the main holiday											
	Social			Recreation/ Wellness			Sun/Beach			Culture		
	.in 2008	.in 2009	.in 2010	.in 2008	.in 2009	.in 2010	.in 2008	.in 2009	.in 2010	.in 2008	.in 2009	.in 2010
Friends and colleagues	59	63	64	59	58	59	60	61	58	55	56	53
The Internet	44	47	47	48	50	52	48	51	55	45	50	53
Personal experience	37	34	31	32	32	29	30	29	30	24	25	25
Travel / tourist agencies	18	17	17	20	18	19	22	21	22	25	22	21
Catalogues, brochures (non-commercial)	14	12	11	14	15	14	15	16	13	18	17	15
Guidebooks and magazines (commercial)	10	11	12	13	13	14	10	10	11	18	17	19
Media (newspaper, radio, TV)	10	9	10	8	8	8	8	7	9	11	9	9

Q5(2010&2011)/Q6(2009). What was the major motivation for your main holiday trip in 200x?  
 Q11a(2010&2011)/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(2010&2011)/Q19b(2009). And what is the second most important?

Base: respondents who made at least one holiday trip, EU27 (DK/NA not shown)

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.

**Information sources when deciding about holidays**

(Column %, first and second choice combined)

	Preferred holiday destinations					
	Traditional, well-known			Non-traditional		
	2009	2010	2011	2009	2010	2011
Friends and colleagues	60	59	60	58	59	57
The Internet	37	39	42	47	51	54
Personal experience	34	33	32	26	27	26
Travel / tourist agencies	24	24	23	23	21	19
Catalogues, brochures (non-commercial)	15	15	14	15	14	13
Guidebooks and magazines (commercial)	11	11	12	15	15	16
Media (newspaper, radio, TV)	9	10	10	10	8	9

Q9(2011-2010)/Q17(2009). What type of holiday destinations do you prefer?  
 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 not shown)

### ***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 largest difference in the proportions of respondents who listed non-commercial catalogues or brochures (e.g. those of a regional tourism association) was between age groups: 9% of 15-39 year-olds said that such catalogues and brochures were an important source of information when making a decision about travel plans, compared to twice as many of the over 54 year-olds (18%). The largest difference in the proportions who listed commercial guidebooks and magazines, however, was between educational groups: this source of information was selected by 10% of the least educated, as opposed to 17% of the most educated.

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).

Additionally, the over 54 year-olds and those with the lowest level of education were less likely than their counterparts to consider recommendations from friends and family to be an important source of information when making holiday plans, but they were more likely to say the same about personal experience. For example, 52% of over 54 year-olds mentioned word-of-mouth recommendations and 33% selected personal experience; the corresponding figures for 15-39 year-olds were 63% and 27%, respectively.

Finally, the over 54 year-olds, respondents with the lowest level of education, non-working respondents and those living in rural areas were somewhat more likely than their counterparts to say that they did not know which source of information they considered to be the most important.

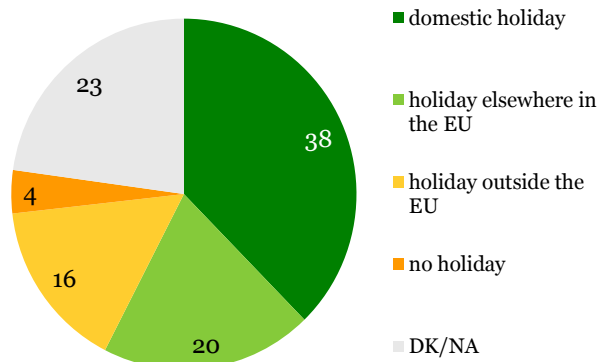
For more details, see annex tables 11b and 12b.

## 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 2011<sup>11</sup>.

**Planned destination of the main holiday – EU27**  
**...in 2011**



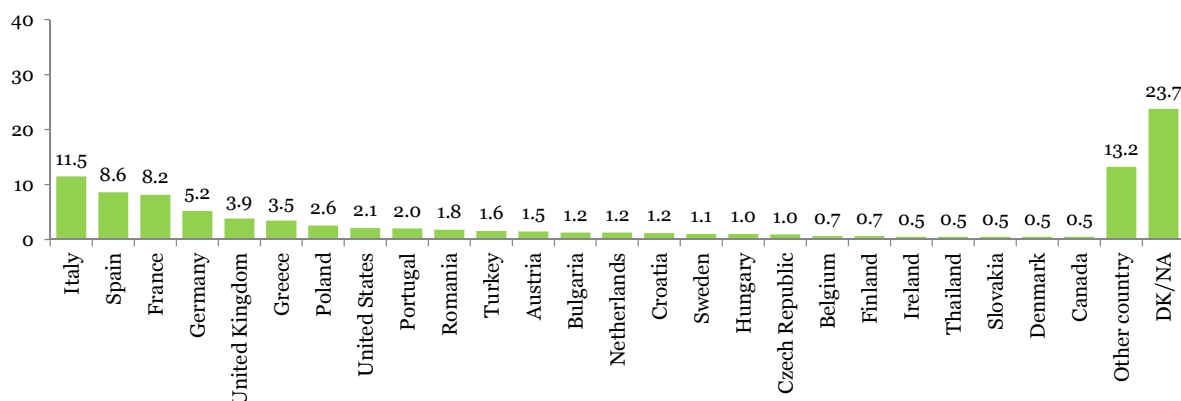
Q13(2011)/Q15(2010)/Q23(2009). Where do you plan to spend your main holiday in 2011/2010/2009?  
%, Base: all respondents, EU27

Italy, Spain and France were the most popular holiday destinations for EU citizens (who were planning a holiday in 2011<sup>12</sup>). 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.

The lower chart of the two charts on the next page focuses on those respondents who were planning to travel to a *foreign country*, with 7% choosing Spain, 6% choosing Italy and 4% choosing France. Other popular countries for non-domestic holidays included the United States (selected by 4% of EU citizens who were planning a holiday in a foreign country), Greece and Turkey (both 3%).

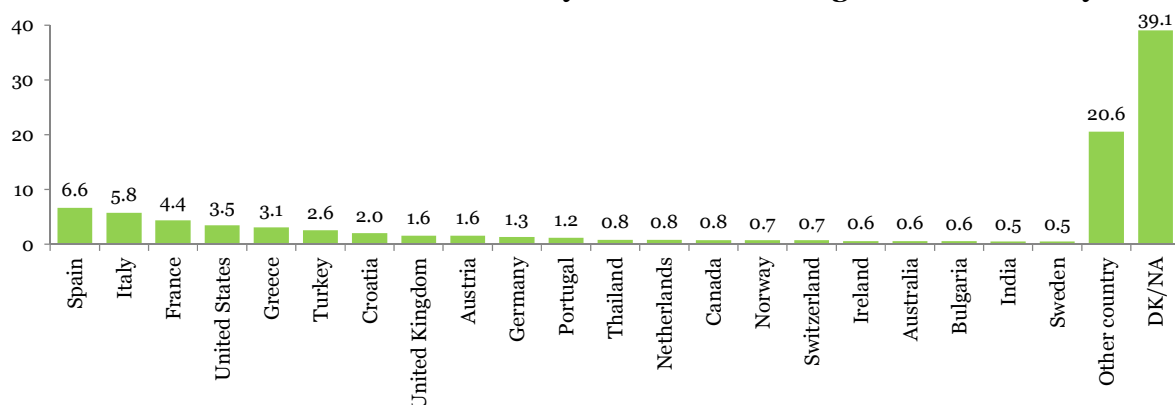
<sup>11</sup> Although respondents in earlier waves were also presented with a question about their planned holiday destination, due to differences in the questionnaire (and the group of respondents that were presented with this question), the results of these questions cannot be compared across different waves/years.

<sup>12</sup> 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.

**Planned destination of the main holiday in 2011 - including domestic holidays****Q13. Where do you plan to spend your main holiday in 2011?**

%, Base: who are planning a holiday, EU27

Countries mentioned at least 0.5% shown

**Planned destination of the main holiday in 2011 - excluding domestic holidays****Q13. Where do you plan to spend your main holiday in 2011?**

%, Base: who are planning a holiday (excluding respondents who were planning a domestic holiday), EU27

Countries mentioned at least 0.5% shown

**Country variations**

Looking at *all respondents*, a majority of Turks (78%), Croats (77%), Greeks (68%), Italians (63%), Portuguese (58%) and Bulgarians (55%) were thinking about spending their main holiday in 2011 within their own country. The least likely to plan a vacation “at home” were respondents in Luxembourg and the former Yugoslav Republic of Macedonia (8% and 11%, respectively).

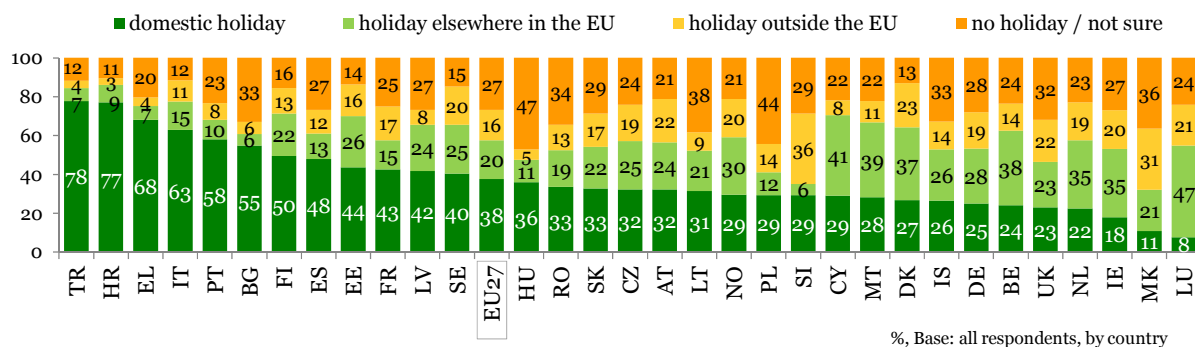
The proportions of respondents who were planning to visit another EU country were the highest in Luxembourg (47%), Cyprus (41%), Malta (39%), Belgium (38%) and Denmark (37%). A vacation outside of the EU was the most popular for Slovenes (36%); this is explained by the fact that many Slovenian tourists picked destinations in other countries of the former Republic of Yugoslavia (most prominently in Croatia – see further in the report). Other countries where at least a fifth of respondents were planning to spend their 2011 holiday in a non-EU country were Norway, Ireland and Sweden (all 20%), Luxembourg (21%), Austria and the UK (both 22%), Denmark (23%) and the former Yugoslav Republic of Macedonia (31%).

The second chart in the two below focuses solely on respondents who were planning a holiday in 2011 and had already chosen a destination. 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 another four countries, a relative majority were planning a domestic holiday.

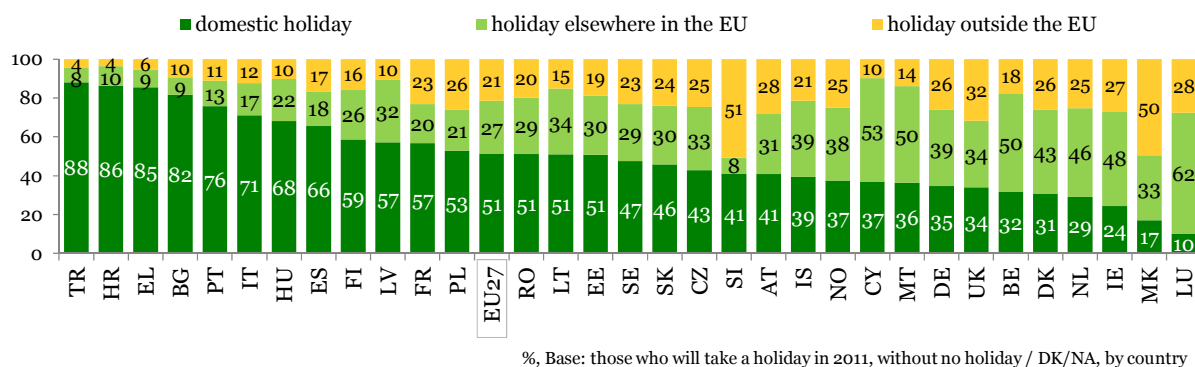


In nine countries, the largest proportion of respondents – who were planning a holiday in 2011 and had already chosen a destination – had chosen a destination elsewhere in the EU; respondents in Luxembourg were the most likely to have made such a choice (62%). Finally, in two countries, about half of the respondents were planning a holiday outside the EU: Slovenia (51%) and the former Yugoslav Republic of Macedonia (50%).

### Planned destination of the main holiday in 2011...



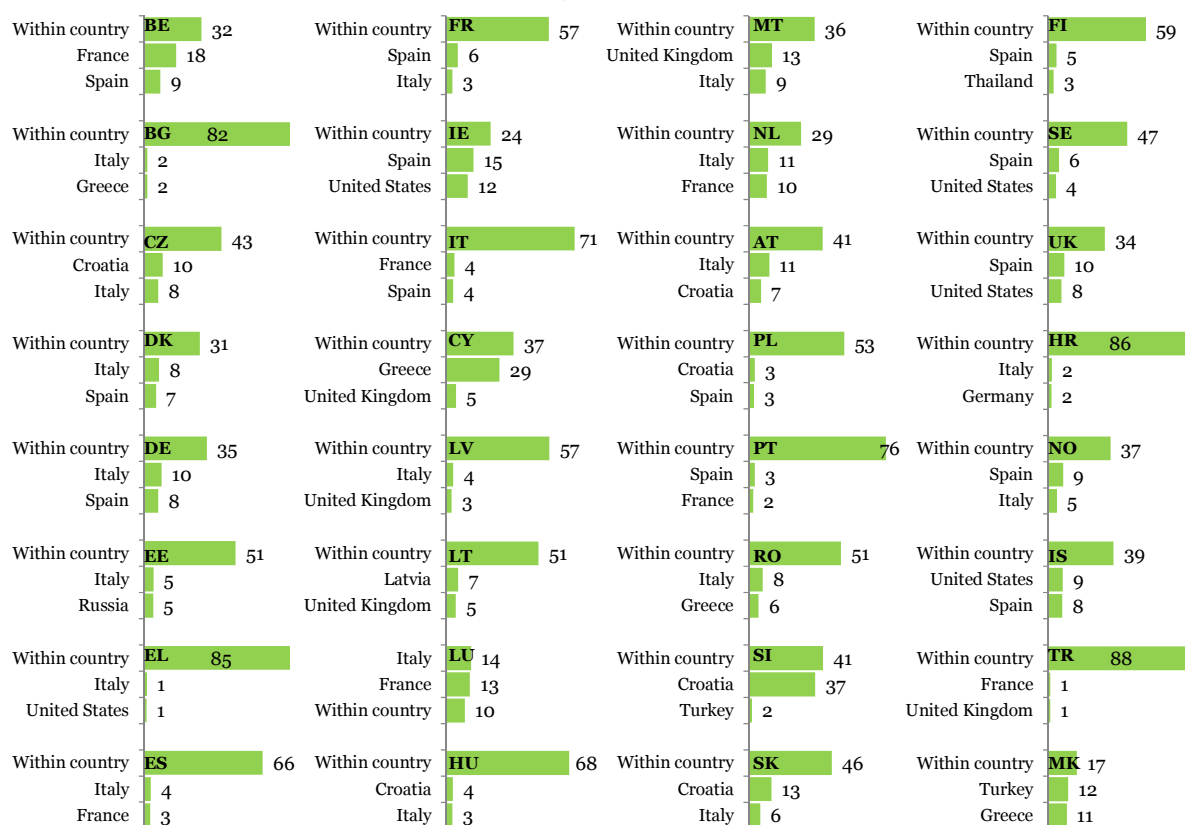
### ... and focusing on those who will take a holiday in 2011



Q13. Where do you plan to spend your main holiday in 2011?

As expected, based on the EU-wide results, Spain, France and/or Italy were popular holiday destinations in many of the surveyed countries. For example, 18% of Belgians – who were planning a holiday in 2011 – were planning to go to France. Similarly, 14% of Luxembourgish holidaymakers had chosen Italy as the destination of their main holiday in 2011.

In 14 countries, a non-EU country appeared in the top three of most popular holiday destinations for 2011. As noted above, a vacation outside of the EU was the most popular in Slovenia; 37% of Slovenes – who were planning a holiday in 2011 – said they were thinking about spending this holiday in Croatia.

**Planned destination of the main holiday in 2011** (*three most mentioned destinations*)

**Q13. Where do you plan to spend your main holiday in 2011?**  
%, Base: who are planning a holiday, by country

**Socio-demographic considerations**

Older respondents, those with the lowest level of education, respondents living in urban areas, manual workers and non-working respondents were the most likely to say that they were planning a holiday in their home country. For example, 43% of the over 54 year-olds were planning a vacation “at home”, compared to 26% of 15-24 year-olds.

Conversely, younger respondents and full-time students, those with higher levels of education, employees and the self-employed most frequently said they would visit another country – in the EU or outside of the EU. For example, 30% of full-time students and 23% of respondents with the highest level of education were thinking about visiting another EU country, compared to just 10% of respondents with the lowest level of education. Similarly, 20% of the most-educated respondents and 22% of full-time students said they would spend their main 2011 vacation outside of the EU, compared to 8% of the least-educated respondents.

For more details, see annex table 14b.

**“Vulnerable” tourists**

Due to the large number of undecided respondents, it was not possible to directly compare the current plans with the actual trips made in 2010. About 3 in 10 (29%) EU citizens had not travelled for leisure purposes in 2010; in February 2011, 4% of EU citizens already knew that they would not go on holiday in 2011. The unknown factor is how many of the currently undecided respondents (23%), i.e. who said they did not know yet where they would spend their main holiday in 2011, would opt for or against making a holiday trip in 2011.

If one compares the current plans for 2011 with the reported number of leisure trips in 2010 in a more segmented manner, it is easy to pinpoint the most critical population segment: those who travelled in 2010, but were still undecided as to whether they would take a holiday in 2011<sup>13</sup>. This is 14% of EU citizens and their eventual decision will have an impact on the tourism industry. Furthermore, one might expect those who had not travelled in 2010 and were still hesitating about their vacation plans in 2011 – this is 9% of the EU adult population – to be just as likely to stay at home in 2011 as well.

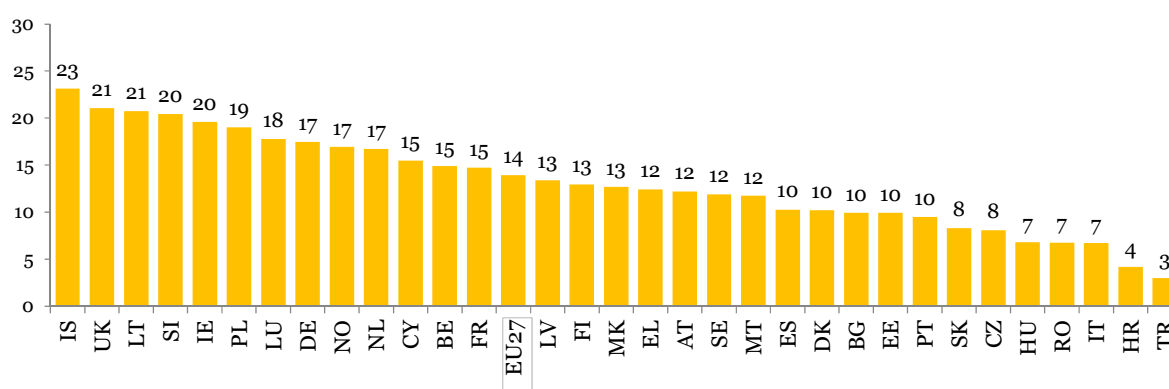
**2011 plans compared to 2010 actual situation  
(Total %)<sup>14</sup>**

2011 travel plans	Travel for leisure purposes in 2010			
	no private travel	some private travel	DK/NA	Total
will not travel	3	1	0	4
have some plans	18	55	1	73
DK/NA	9	14	0	23
<i>Total</i>	29	70	1	100

The largest proportions of “vulnerable” tourists – i.e. those who had travelled in 2010 and were still undecided about 2011 – were found in Iceland (23%), the UK and Lithuania (both 21%), Slovenia and Ireland (both 20%). In Turkey and Croatia, on the other hand, just 3%-4% of respondents were classified in this category.

**“Vulnerable” tourists**

(those who had travelled for private reasons in 2010, but were still undecided about 2011 plans, %)



**Q13. Where do you plan to spend your main holiday in 2011?**  
%, Base: all respondents, EU27

<sup>13</sup> Some or many of these respondents might be considering various destinations, and might take a holiday once a decision has been made. However, these people had not booked a holiday at the time of the survey and, therefore, might cancel their 2011 plans.

<sup>14</sup> Note: due to rounding, the figures shown in the “total” columns/rows may not always add up exactly to the numbers shown in the individual columns/rows.

***Socio-demographic considerations***

In accordance with the results for leisure trips made in 2010 (see chapter 1), older EU citizens and those with the lowest level of education were the most likely to say that they would not travel in 2011. For example, 6% of the over 54 year-olds answered that they were certain they would not take a vacation in 2011, compared to just 2% of 15-24 year-olds. Similarly, while 9% of respondents with the lowest level of education were certain they would not travel for leisure purposes in 2011, this proportion decreased to 2% for respondents with the highest level of education.

The proportion of EU citizens who travelled in 2010 but were still undecided about their 2011 plans (i.e. “vulnerable” tourists) was slightly higher among those aged 54 or younger (14%-17% vs. 11% of the over 54 year-olds), the economically active (14%-16% vs. 12% of non-working respondents), large city dwellers (16% vs. 13%-14% of urban and rural residents) and respondents with a high level of education (16% vs. 9% of respondents with the lowest level of education).

For more details, see annex table 14b.

**Proportion of “vulnerable” tourists  
in the various socio-demographic segments**  
(see definition above)

	% vulnerable
EU27	14
Male	14
Female	14
AGE: 15-24	14
AGE: 25-39	17
AGE: 40-54	15
AGE: 55+	11
Self-employed	16
Employees	16
Manual workers	14
Not working	12
Metropolitan zone	16
Other town/urban/centre	13
Rural zone	14
EDUCATION: -15 years of age	9
EDUCATION: 16-20	14
EDUCATION: 20+	16
EDUCATION: Still in education	14

Flash EB Series #328

Survey on the attitudes  
of Europeans  
towards tourism  
*Wave 3*

Annex  
Tables and  
Survey  
Details

THE GALLUP ORGANIZATION

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Table 1a. Number of short business or private trips in 2010 – *by country*

QUESTION: Q1. During 2010, how many times have you travelled for business or private purposes where you were away from home for a minimum of one night?


































		Total N	% None	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
	<b>EU27</b>	27125	26.7	16	13.7	11.1	12.8	10.6	8.3	0.8
	<b>COUNTRY</b>									
	Belgium	1002	26.1	23.8	17.5	13.9	11.4	5.4	1.9	0.1
	Bulgaria	1000	31.7	7.9	7.6	7.2	11.6	12.7	18.5	2.6
	Czech Rep.	1000	33	16.1	13.4	7.6	10.9	8.6	7.7	2.8
	Denmark	1005	12.7	16.1	15.3	13.2	19.7	14.3	8.4	0.3
	Germany	2009	20.2	17.2	17	14.4	14.1	9.8	6.5	0.9
	Estonia	516	36.5	18.6	15.2	10.3	9.1	6.1	4.1	0.2
	Greece	1000	22.7	13.1	11.9	11.8	14.2	15.1	10.8	0.3
	Spain	1505	30.9	17.4	13.4	9.3	11.4	7.5	10	0.3
	France	1506	21.3	15.9	14.4	11	15.4	12.2	9.5	0.3
	Ireland	1000	16.3	16.4	16.3	18.1	15.9	10.3	6.4	0.4
	Italy	1510	35.8	17.8	13.2	11.6	9.2	8.7	3.6	0
	Cyprus	503	33.2	24.7	15.3	8.7	9.2	5.5	3.5	0
	Latvia	505	35.1	18.7	10.7	7.2	8.6	6.4	13.3	0.1
	Lithuania	502	29.7	13.4	12	9.9	12.5	10.2	11	1.4
	Luxembourg	501	14.2	13.9	24	17.7	16.1	9.4	4.1	0.6
	Hungary	1006	54.4	14.1	7.3	5.2	7	7	4.1	1
	Malta	500	36.2	28.7	13.8	7.4	7.2	4.1	2.1	0.5
	Netherlands	1000	12.3	16	18.4	15.4	20.2	9.5	7.4	0.7
	Austria	1001	20.3	14.5	15.7	15.8	13.2	11.5	7.3	1.6
	Poland	1507	32.7	15.8	11.6	9.2	9.1	10.2	11.1	0.5
	Portugal	1007	40	16	8.8	8.1	7.8	9	9	1.3
	Romania	1013	40.8	12	8	9.3	10.3	11.2	7.5	0.9
	Slovenia	503	22.6	15.2	16	9.4	15.1	10.4	9.7	1.6
	Slovakia	1021	37	13.1	10.4	5.3	12.4	8.2	9.9	3.7
	Finland	1000	8.9	8.5	10	9.1	16.4	19.4	25.9	1.8
	Sweden	1003	11.3	10.6	12	12.1	18.9	18.9	14.3	1.9
	United Kingdom	1500	21.3	15.4	14	10	14.8	14.2	9	1.3
	Croatia	505	29.1	12.9	11.3	9.2	12.1	13.2	11.1	1.1
	Turkey	1001	63.1	15.8	5.9	6.5	3.2	3.7	1.5	0.3
	Macedonia	556	32.4	16.8	10.5	9	11.2	10.3	8.3	1.5
	Norway	500	7.5	7.5	7.8	8.6	15.5	24	20.2	9
	Iceland	500	15	16.7	14	10.7	18	15.3	8	2.2

Table 1b. Number of short business or private trips in 2010 – *by segment*

QUESTION: Q1. During 2010, how many times have you travelled for business or private purposes where you were away from home for a minimum of one night?






	Total N	% None	% 1	% 2	% 3	% 4-5	% 6- 10	% 10+	% DK/NA
<b>EU27</b>	27125	26.7	16	13.7	11.1	12.8	10.6	8.3	0.8
 <b>SEX</b>									
Male	13106	24.7	14.5	12.8	10.6	13.5	11.7	11	1
Female	14019	28.6	17.3	14.5	11.6	12.2	9.6	5.7	0.5
 <b>AGE</b>									
15 - 24	3793	19.1	19	16.8	12.6	12.1	10.2	9.1	1.2
25 - 39	6339	20.8	16.1	14.4	10.6	13.6	13	10.7	0.8
40 - 54	7229	24.4	15.4	13.2	12.3	13.6	11.5	8.9	0.8
55 +	9394	35.1	15.3	12.5	10.2	11.9	8.6	5.8	0.5
 <b>EDUCATION (end of)</b>									
Until 15 years of age	3672	50.3	17.5	9.9	7.7	5.7	4.7	3.8	0.2
16 - 20	11931	29	17.7	14.1	10.9	11.5	8.8	7.1	0.9
20 +	8210	14.2	11.9	14.1	13	17.8	16	12.3	0.7
Still in education	2683	17.3	18.6	16.9	12.6	14.5	11.3	7.6	1
 <b>URBANISATION</b>									
Metropolitan	5124	20.3	14.2	12.8	13	14.7	13.3	10.4	1.4
Urban	11567	26.2	15.7	14	11.3	12.7	10.7	8.7	0.6
Rural	10301	30.2	17.2	13.9	10.1	12.1	9.2	6.7	0.5
 <b>OCCUPATION</b>									
Self-employed	2571	20.1	11.9	11.9	11.5	15.4	15.4	12.8	1.1
Employee	9392	15.5	15.3	15.3	13.1	15.5	13.5	10.8	1
Manual worker	2206	33.7	19.1	12.6	9	8.6	8.2	8.4	0.3
Not working	12811	35	16.8	13.2	10	11	8	5.4	0.5



Table 2a. Number of short private trips in 2010 – *by country*

QUESTION: Q2. And how many of these were short private trips, where you stayed away for less than four nights?

Base: those who travelled for business or private purposes in 2010


































	Total N	% None	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
 <b>EU27</b>	19876	37.1	20.4	15.1	8.2	7.3	6.3	4.6	0.8
<b>COUNTRY</b>									
 Belgium	740	42.9	29.9	12.7	7.2	3.9	2.9	0.4	0.2
 Bulgaria	683	19.1	14.8	12.3	11.9	11.5	14.5	11.5	4.5
 Czech Rep.	670	37.2	14.5	16.1	6.9	6.5	6.3	5.7	6.9
 Denmark	877	44.9	21.6	12.1	6.9	5.9	5.2	2.9	0.4
 Germany	1604	42.9	24.1	14.3	6.8	5.3	3.3	2.7	0.6
 Estonia	328	37	28.4	12.9	5	7.3	4.8	3.8	0.8
 Greece	773	32.4	18.7	15.4	9.4	10.8	7.8	4.9	0.6
 Spain	1040	36.6	22.4	15.8	6.4	6.1	5.9	6.6	0.1
 France	1185	42.7	15.4	11.9	8.8	7.5	8.5	4.9	0.4
 Ireland	837	31.4	21.8	18.4	11.8	7.6	5.3	3.4	0.4
 Italy	970	36.3	22	17.6	7.6	7.4	6	3	0.1
 Cyprus	336	59.2	18.4	12.3	4.7	2.9	1.1	1.4	0
 Latvia	328	30.7	25.5	9	8.4	6.7	6.6	12.4	0.6
 Lithuania	353	26.9	21.1	18	6.2	10	7.9	8.6	1.3
 Luxembourg	430	42.2	25.1	17.2	7.1	3.9	2.1	2.1	0.2
 Hungary	459	32.8	25.9	17.9	4.4	9.5	6.2	2.8	0.4
 Malta	319	47	26.4	12.7	5.1	3.8	3.6	1.3	0
 Netherlands	877	39.1	21.4	17.6	7.9	5.3	3.6	4	1
 Austria	797	34.5	24.4	18.6	6.7	7.5	4.8	2.3	1.1
 Poland	1014	33.8	18.1	18.2	9.1	6.1	8.1	5.5	1
 Portugal	604	36.1	18.8	15.2	6.8	9.3	6.3	6.1	1.4
 Romania	600	33.1	21.4	14.2	8.8	9.1	7.2	5.5	0.5
 Slovenia	389	29.6	29.7	14.7	8.1	4.2	5	6	2.6
 Slovakia	644	26.4	15.8	19.4	8.4	8.8	9.4	7.5	4.2
 Finland	911	14	14.3	14.2	10.6	13.7	16.5	15.3	1.3
 Sweden	890	23.7	20.9	14.5	11.7	14	8.5	4	2.7
 United Kingdom	1180	35.2	17.3	14.3	10.7	9.2	7	5.4	0.9
 Croatia	358	29.1	17.9	19.3	10.9	7.5	7.6	5.4	2.3
 Turkey	369	53.7	17.6	8	6.6	2.4	3.1	2.4	6.2
 Macedonia	376	32.9	21.8	11.8	10.3	8.5	8	4.3	2.4
 Norway	463	19.5	12.8	16.9	10.6	13.3	10.4	8.6	7.9
 Iceland	425	28.1	17.7	16.6	11.3	9.7	9.8	4.1	2.6

Table 2b. Number of short private trips in 2010 – by segment (Base: those who travelled for business or private purposes in 2010)

QUESTION: Q2. And how many of these were short private trips, where you stayed away for less than four nights?

Base: those who travelled for business or private purposes in 2010






	Total N	% None	% 1	% 2	% 3	% 4-5	% 6- 10	% 10+	% DK/NA
<b>EU27</b>	19876	37.1	20.4	15.1	8.2	7.3	6.3	4.6	0.8
 <b>SEX</b>									
Male	9863	34.7	19.2	15.1	8.8	8.2	7.5	5.7	0.7
Female	10013	39.5	21.5	15	7.7	6.5	5.2	3.6	1
 <b>AGE</b>									
15 - 24	3070	36.8	22.5	15.4	6.3	6.1	6.8	5.1	1
25 - 39	5022	33	21	13.9	8.9	8.4	8.2	5.8	0.8
40 - 54	5466	33.3	21.4	17.2	9.2	7.3	6.1	4.9	0.6
55 +	6095	44.3	17.9	13.9	7.8	7	4.9	3.1	0.9
 <b>EDUCATION (end of)</b>									
Until 15 years of age	1826	46.7	23.6	12.2	5.3	4.8	4	2.7	0.5
16 - 20	8473	39.7	20.9	14.9	7.4	6.7	5.1	4.2	1
20 +	7045	31.4	18.4	15.9	10.4	9	8.7	5.7	0.5
Still in education	2217	36	21.8	16.2	7.3	7	6	4.5	1.2
 <b>URBANISATION</b>									
Metropolitan	4081	35	19.6	14.2	9	7.8	7.7	5.5	1.1
Urban	8537	37.7	18.8	15.7	7.7	7.1	6.9	5.2	0.9
Rural	7189	37.7	22.6	14.9	8.5	7.3	5	3.5	0.6
 <b>OCCUPATION</b>									
Self-employed	2055	29	18.8	17.4	8.8	10.4	7.5	7.3	0.7
Employee	7936	32.3	21	15.8	9.7	7.8	7.7	5	0.7
Manual worker	1463	41.4	21.5	12.6	5.5	7.9	5.2	5.2	0.7
Not working	8324	42.9	20.1	14.2	7.2	6.1	5	3.5	1

Table 2c. Number of short private trips in 2010 – by segment (Base: those who made at least one short private trip in 2010)

QUESTION: Q2. And how many of these were short private trips, where you stayed away for less than four nights?

Base: those who made at least one short private trip in 2010






	Total N	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
<b>EU27</b>	12495	32.4	24	13.1	11.7	10.1	7.4	1.3
 <b>SEX</b>								
Male	6440	29.5	23.2	13.5	12.6	11.6	8.7	1.1
Female	6055	35.5	24.8	12.7	10.8	8.6	6	1.6
 <b>AGE</b>								
15 - 24	1940	35.7	24.3	9.9	9.6	10.8	8.1	1.6
25 - 39	3367	31.3	20.7	13.3	12.6	12.2	8.7	1.2
40 - 54	3647	32.1	25.8	13.9	10.9	9.1	7.4	0.9
55 +	3393	32.2	25	14.1	12.6	8.9	5.6	1.7
 <b>EDUCATION (end of)</b>								
Until 15 years of age	973	44.3	22.9	10	9.1	7.5	5.2	1
16 - 20	5105	34.7	24.7	12.3	11.2	8.4	7	1.7
20 +	4835	26.9	23.2	15.2	13.1	12.6	8.3	0.7
Still in education	1418	34	25.3	11.5	10.9	9.3	7	1.9
 <b>URBANISATION</b>								
Metropolitan	2653	30.2	21.8	13.8	12	11.9	8.5	1.8
Urban	5320	30.2	25.2	12.4	11.5	11	8.3	1.4
Rural	4477	36.3	23.9	13.7	11.7	7.9	5.5	1
 <b>OCCUPATION</b>								
Self-employed	1458	26.6	24.5	12.4	14.7	10.6	10.3	0.9
Employee	5369	31	23.4	14.3	11.5	11.4	7.4	1.1
Manual worker	857	36.6	21.6	9.4	13.4	8.9	8.9	1.2
Not working	4752	35.2	24.9	12.6	10.7	8.7	6.1	1.8

Table 3a. Number of holidays in 2010 – *by country*

QUESTION: 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: those who travelled for business or private purposes in 2010


































	Total N	% None	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
 <b>EU27</b>	19876	20.7	36.6	20.4	9.1	6.8	3.6	1.6	1.1
<b>COUNTRY</b>									
 Belgium	740	26.4	39.3	17	5.9	4.9	1.7	0.1	4.8
 Bulgaria	683	33.4	31.2	13.6	8.5	5.3	2.7	1.9	3.4
 Czech Rep.	670	14.9	46	23.6	5.9	2.9	3.2	0	3.4
 Denmark	877	12.7	34.1	21.8	12.7	12.7	3	1.7	1.2
 Germany	1604	16.5	35.8	24.4	11.8	7.6	2.1	0.9	1
 Estonia	328	34.2	31.4	17.1	4.7	5.1	2.9	0.5	4.2
 Greece	773	28.9	32.6	17	9.5	5.6	4.5	1.7	0.3
 Spain	1040	20.1	36.4	17.8	8.9	6.9	5.7	3.8	0.3
 France	1185	18.4	32.9	24.8	9.5	8.1	4.3	1.8	0.3
 Ireland	837	22.2	39.6	19.8	9.8	6.2	1.8	0.5	0.1
 Italy	970	19.5	45.8	17.8	7	5.6	2.9	0.8	0.6
 Cyprus	336	11.8	49.8	17.3	10.2	3.6	3.7	2.2	1.4
 Latvia	328	40.9	24.1	13.4	5.3	4.9	1.7	9.6	0.1
 Lithuania	353	23.2	48.1	13.2	10	2.5	1.7	0.5	0.9
 Luxembourg	430	16.1	33.2	20.7	14.5	10.8	4.3	0.5	0
 Hungary	459	34.9	39.6	11	7	2.6	3.6	1.1	0.3
 Malta	319	29.5	42.1	13.4	5.2	4.3	2.5	1	2.2
 Netherlands	877	13.7	34.6	27.4	12.3	8.2	2.1	0.7	0.9
 Austria	797	19.8	34.2	21.8	9.4	6.8	4.3	0.4	3.3
 Poland	1014	30.1	42.1	13.4	4.8	2.9	2.6	2.7	1.4
 Portugal	604	26.8	36.1	15.5	5.8	7.1	4.2	3.2	1.3
 Romania	600	31.7	38.4	13.2	5.3	6.2	3	1.6	0.6
 Slovenia	389	17	33.3	22.9	8.4	6.7	5.9	1.6	4.3
 Slovakia	644	37.2	34.6	15	3.8	4.6	1.3	0.5	3
 Finland	911	25.5	23.1	16.1	8.8	12.3	6.9	5.2	2
 Sweden	890	21.9	24.2	20.8	10.2	9.6	3.7	3	6.6
 United Kingdom	1180	17.4	34.6	22.4	10.5	7.9	5.4	1.1	0.7
 Croatia	358	32.9	29.7	13.3	6.6	6.9	6.3	3.4	1
 Turkey	369	31.9	27	7.5	7.1	3.7	3	0.7	19.2
 Macedonia	376	23.5	45	12	6.7	4.1	4.3	1.4	2.9
 Norway	463	14.6	27.2	23.3	11.5	12.5	3.9	2	5
 Iceland	425	26.6	32.5	19.2	5.6	7.2	2.8	0	6.2

Table 3b. Number of holidays in 2010 – by segment (Base: those who travelled for business or private purposes in 2010)

**QUESTION: 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: those who travelled for business or private purposes in 2010*






	Total N	% None	% 1	% 2	% 3	% 4-5	% 6- 10	% 10+	% DK/NA
<b>EU27</b>	19876	20.7	36.6	20.4	9.1	6.8	3.6	1.6	1.1
 <b>SEX</b>									
Male	9863	21.1	35.3	20.2	9.2	7.1	4.1	2	0.9
Female	10013	20.3	37.9	20.7	9	6.6	3	1.2	1.3
 <b>AGE</b>									
15 - 24	3070	20.8	38.5	21.3	7.8	5.6	3.5	1.3	1.3
25 - 39	5022	19.3	40.3	20.2	8	5.9	3.4	1.6	1.3
40 - 54	5466	20.9	36.6	21.3	9.6	6.5	3	1.4	0.8
55 +	6095	21.9	32.7	19.5	10.3	8.4	4.2	1.9	1.3
 <b>EDUCATION (end of)</b>									
Until 15 years of age	1826	28.2	40.3	14.9	6.4	4.8	2.4	1.7	1.3
16 - 20	8473	22.3	38.7	19.1	8.1	6	3.1	1.5	1.2
20 +	7045	17.6	32.4	22.8	11	8.8	4.5	1.8	1
Still in education	2217	18.4	38.8	23.1	8.8	5.5	3.1	1	1.2
 <b>URBANISATION</b>									
Metropolitan	4081	18.8	32.9	21	11.1	8.8	3.9	2	1.5
Urban	8537	20.8	37.1	19.9	8.9	6.8	3.9	1.5	1.1
Rural	7189	21.7	38.3	20.6	8.1	5.7	3	1.5	1
 <b>OCCUPATION</b>									
Self-employed	2055	21.8	33.5	19.3	10.3	7	4.7	2.7	0.7
Employee	7936	17.3	38.1	22.2	9.7	6.9	3.5	1.3	1
Manual worker	1463	27	40.7	16.1	5.5	5.8	2.2	1.7	0.9
Not working	8324	22.7	35.5	19.7	8.8	6.8	3.6	1.5	1.3

Table 3c. Number of holidays in 2010 – by segment (Base: those who made at least one holiday trip)

**QUESTION: 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: those who made at least one holiday trip*






































	Total N	% 1	% 2	% 3	% 4-5	% 6- 10	% 10+	% DK/NA
<b>EU27</b>	15757	46.2	25.8	11.5	8.6	4.5	2	1.4
 <b>SEX</b>								
Male	7778	44.8	25.6	11.6	9	5.2	2.5	1.2
Female	7979	47.6	26	11.3	8.2	3.8	1.5	1.7
 <b>AGE</b>								
15 - 24	2433	48.6	26.8	9.9	7.1	4.4	1.6	1.6
25 - 39	4054	50	25.1	9.9	7.3	4.2	2	1.6
40 - 54	4324	46.3	26.9	12.1	8.3	3.7	1.8	1
55 +	4762	41.8	24.9	13.1	10.7	5.4	2.5	1.6
 <b>EDUCATION (end of)</b>								
Until 15 years of age	1311	56.2	20.7	8.9	6.7	3.3	2.4	1.8
16 - 20	6587	49.7	24.6	10.5	7.7	4	2	1.5
20 +	5804	39.3	27.7	13.4	10.7	5.5	2.2	1.2
Still in education	1809	47.6	28.3	10.8	6.7	3.9	1.3	1.5
 <b>URBANISATION</b>								
Metropolitan	3315	40.5	25.9	13.7	10.9	4.8	2.5	1.8
Urban	6759	46.8	25.1	11.3	8.6	4.9	1.9	1.3
Rural	5627	49	26.3	10.3	7.3	3.9	1.9	1.3
 <b>OCCUPATION</b>								
Self-employed	1607	42.9	24.7	13.2	9	6	3.4	0.9
Employee	6567	46	26.9	11.8	8.3	4.2	1.6	1.2
Manual worker	1067	55.8	22	7.6	8	3	2.3	1.2
Not working	6435	45.9	25.5	11.3	8.8	4.7	2	1.7

Table 4a. The main reason for not going on holiday in 2010 – *by country*

QUESTION: Q4. What was the main reason why you did not go on holiday in 2010?

Base: those who did not make a holiday trip in 2010 (and those who had not travelled at all in 2010)

	Total N	% Personal/ private reasons	% Financial reasons	% Lack of time	% Prefer to only make short-stay trips	% No motivation to take a holiday in 2010	% Concerns about safety	% Prefer to stay at home or with family / friends	% Other	% DK/NA
 <b>EU27</b>	11368	22.4	41	11	2.5	3.3	0.7	8.9	8.9	1.3
<b>COUNTRY</b>										
 Belgium	457	25.3	15.7	12.9	1.6	5.6	3.9	17.3	14.3	3.5
 Bulgaria	545	11.2	65	9.1	1	2.5	0.3	5.7	3.1	2
 Czech Rep.	429	26	33.4	10.4	3.8	6.2	2.1	10.9	7.1	0.1
 Denmark	239	24.6	21.9	14.2	2.3	4.2	0.2	11.7	20.1	0.8
 Germany	669	29.5	27.9	13.3	3.7	5.3	0.5	9.6	7.8	2.2
 Estonia	300	16.7	41.1	11.4	4.5	4.6	2.4	9.6	7.4	2.4
 Greece	450	17.1	58.2	8.8	0.9	1.7	1.2	7.4	4	0.6
 Spain	675	21.4	46.3	9.7	1.5	2.1	0.2	9.3	9.6	0
 France	539	23.4	36.6	10.2	2.2	4	0.4	9.6	13.2	0.5
 Ireland	349	15.6	47.9	5	2	5.2	0.7	14	9	0.7
 Italy	729	33.4	36	14.8	3	1.8	0.7	8.5	1.8	0
 Cyprus	207	17.3	44.2	6.7	2.1	3.2	1.7	3.2	21.6	0
 Latvia	312	9.7	43	9.3	2.3	7.7	0.4	4.1	9.4	14.2
 Lithuania	231	12.7	49.8	9.5	2.1	4.2	2.8	6.7	9.3	3
 Luxembourg	141	32.2	26.9	9.1	3.3	3.7	1	12.1	11.4	0.4
 Hungary	707	9.9	68.1	6.9	1.9	1.5	0	5.2	6.2	0.3
 Malta	275	16.8	47.1	7.5	1.9	5.6	1.1	6.9	10.1	3.1
 Netherlands	243	22	22.8	4.1	3.3	4.1	0.5	5.9	33	4.4
 Austria	361	26	24.7	15.1	5.9	3.5	1.2	13.1	8	2.4
 Poland	798	17.5	46.4	14.5	0.9	0.4	0.9	8.6	9.4	1.4
 Portugal	564	14.9	54.6	9.9	0.6	2.1	0.3	5.3	12	0.2
 Romania	604	13.9	61.9	7.6	0.8	2.7	0.4	4.6	8	0.2
 Slovenia	180	18.1	38.9	3.7	12.2	9.6	0	9.2	8.1	0.2
 Slovakia	616	17.4	44.5	9.2	3.8	7	0.5	10.4	6.3	0.9
 Finland	321	14.6	25.7	16.7	7.2	6.4	0.8	15	11.7	1.8
 Sweden	308	15.6	20.9	8.6	4.3	5.1	0.3	11.9	23.7	9.6
 United Kingdom	526	20.8	40.7	7.6	4	4.1	1	10.6	9.4	1.9
 Croatia	265	31.8	46.9	6.9	0.4	2.1	0	3.6	6.3	2
 Turkey	749	24.4	43.8	17.6	1.1	0.7	1.1	4.2	6.6	0.5
 Macedonia	269	24.7	52.2	11.7	0.8	1.4	0.4	2.6	3	3.2
 Norway	105	11.1	20.8	10.3	5.8	0.7	0	11.1	29.8	10.5

	Iceland	188	14.2	29.8	13.8	2.1	3.2	1.1	6.4	14.4	15.1
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Table 4b. The main reason for not going on holiday in 2010 – *by segment*

QUESTION: Q4. What was the main reason why you did not go on holiday in 2010?

Base: those who did not make a holiday trip in 2010 (and those who had not travelled at all in 2010)






















	Total N	% Personal/ private reasons	% Financial reasons	% Lack of time	% Prefer to only make short-stay trips	% No motivation to take a holiday in 2010	% Concerns about safety	% Prefer to stay at home or with family / friends	% Other	% DK/NA
<b>EU27</b>	11368	22.4	41	11	2.5	3.3	0.7	8.9	8.9	1.3
 <b>SEX</b>										
Male	5328	19.1	40.4	14.1	2.4	3.9	0.6	9.3	9	1.3
Female	6040	25.4	41.5	8.3	2.6	2.7	0.8	8.6	8.8	1.2
 <b>AGE</b>										
15 - 24	1360	12.8	39.5	18.9	3.3	3.7	0.6	10.7	9	1.7
25 - 39	2284	18	49.2	14.2	2.5	2	0.5	6.2	6	1.4
40 - 54	2905	17.2	48.4	13.5	1.8	2.8	0.9	6.4	7.5	1.5
55 +	4632	30.4	32.8	5.7	2.9	4.2	0.8	11.2	11.2	1
 <b>EDUCATION (end of)</b>										
Until 15 years of age	2361	26	42.6	6.1	1.9	3.1	0.7	11	8.2	0.4
16 - 20	5345	21.3	44.4	10.4	2.4	3.3	1	7.7	8.1	1.3
20 +	2406	23.7	34.7	14.9	3.3	3.1	0.3	8.5	9.6	1.8
Still in education	873	14.4	35.3	18.9	3.1	4	0.4	12	9.7	2.2
 <b>URBANISATION</b>										
Metropolitan	1808	24.1	39.8	12.6	2.1	3.5	0.3	6.5	9.8	1.2
Urban	4808	23.3	43	9.8	2.7	2.7	0.8	8.8	7.6	1.2
Rural	4674	20.8	39.4	11.6	2.5	3.8	0.8	9.9	9.9	1.4
 <b>OCCUPATION</b>										
Self-employed	964	18.2	33	26.1	2.9	2.9	0.9	7.2	8.3	0.6
Employee	2825	19.6	42.1	13.7	3.3	2.5	0.5	7.2	9.2	2
Manual worker	1139	12.7	55.1	15.7	1.3	3.4	0.4	6.1	4	1.4
Not working	6377	26.1	39.1	6.7	2.4	3.7	0.8	10.5	9.8	1

Table 5a. The major motivation for European citizens' main holiday trip in 2010 – *by country*

QUESTION: Q5. What was the major motivation for your main holiday trip in 2010?

Base: those who made at least one holiday trip in 2010

	Total N	% Sun/beach	% Wellness/health treatment	% Rest/recreation	% City trips	% Sports-related	% Nature	% Culture / religion	% Visiting friends / relatives	% DK/NA
 <b>EU27</b>	15757	17.5	3	35.9	8	3.3	6.5	7.8	16.8	1.3
<b>COUNTRY</b>										
 Belgium	545	15.6	3.2	35.6	8.9	3.7	6.8	13	12.2	0.9
 Bulgaria	455	21.9	5.1	37.5	1.1	1.8	8.3	2.1	20.3	2
 Czech Rep.	571	26.5	5	39.6	0.4	7	10.1	3.3	4.7	3.5
 Denmark	766	22.8	1.6	20.6	9.5	7.2	11.9	12.1	12.3	1.9
 Germany	1340	18.4	4.3	30.9	6.4	5.3	12.4	9.5	11.5	1.3
 Estonia	216	17.2	9.6	30	1.8	3	3.6	5.1	28.3	1.3
 Greece	550	16	2.9	50.6	3.1	0.6	3.3	6.4	15.7	1.4
 Spain	830	16.5	1.3	31.2	14.6	2.2	4.7	7.9	21.1	0.5
 France	967	10.7	3.9	29.7	17.9	2.1	3.9	6.4	25	0.4
 Ireland	651	24.8	0.3	32.3	4.7	3.7	1.4	4.5	26.9	1.4
 Italy	781	16.1	1.4	42.5	5.7	0.6	3.7	14.1	15.2	0.7
 Cyprus	296	2.9	1.1	64.4	2.8	0.5	0.5	6.4	20.6	0.7
 Latvia	193	4.1	3.2	45.2	3.6	2.6	3.6	1.6	34.2	1.9
 Lithuania	271	12.3	9.8	42.6	10.9	2.9	5.9	1.6	13.4	0.6
 Luxembourg	360	20.6	2.4	27.8	7.6	5.8	9.2	8.2	17.8	0.7
 Hungary	299	17.2	6	39.1	4.5	7.9	8.3	6.1	10.7	0.3
 Malta	225	1.4	0.9	53	2.1	5.8	3.9	12.7	17.4	2.8
 Netherlands	757	13.8	0.4	42.2	3.5	5.3	11.9	10.1	11.9	0.9
 Austria	640	20.9	7.9	19.4	6.8	6.5	9.7	14.8	12.9	1.1
 Poland	709	17.5	5.9	43.8	6.9	2.9	5.7	1.9	14.6	0.9
 Portugal	443	23.8	2.4	37	3.5	1.2	4.3	8.1	18.5	1.1
 Romania	409	14.1	5.3	40.2	8.7	1	3.3	3.1	22.7	1.6
 Slovenia	323	24.6	3.6	40.9	8.4	1.4	5.5	3.3	11.4	0.9
 Slovakia	405	26.4	3.4	44.8	5	2.5	6.2	2.6	8	1.1
 Finland	679	12.7	3.2	38	7.9	6.7	6.5	7.4	16.9	0.9
 Sweden	695	25	1.5	23.3	2	6.7	6	9	22.7	3.7
 United Kingdom	974	22.4	0.4	41.3	4.2	3.2	2.6	5.3	18	2.6
 Croatia	240	11.3	3.4	37.7	5	1.7	7.2	7.1	24.1	2.6
 Turkey	252	12.6	0.2	34.5	11.3	0.4	13.1	2.1	24.3	1.4
 Macedonia	287	22.9	5.1	39.5	5	3.2	1.5	2.3	18.2	2.2



	Norway	395	28.6	5.1	14.6	7.2	3.3	7.9	7.4	22	3.9
	Iceland	312	7.5	3	39.8	4.4	2.8	7.2	3.3	26.1	5.8

Table 5b. The major motivation for European citizens' main holiday trip in 2010 – *by segment*

QUESTION: Q5. What was the major motivation for your main holiday trip in 2010?

Base: those who made at least one holiday trip in 2010






































	Total N	% Sun/beach	% Wellness/health treatment	% Rest/recreation	% City trips	% Sports-related	% Nature	% Culture / religion	% Visiting friends / relatives	% DK/NA
<b>EU27</b>	15757	17.5	3	35.9	8	3.3	6.5	7.8	16.8	1.3
 <b>SEX</b>										
Male	7778	16.6	2.6	36.4	8	4.3	6.6	8.1	15.8	1.6
Female	7979	18.3	3.4	35.4	7.9	2.4	6.3	7.5	17.7	0.9
 <b>AGE</b>										
15 - 24	2433	22.9	1.3	31.3	8.7	5	3.9	6.6	19.7	0.6
25 - 39	4054	18.6	1.6	40.2	7.5	3.1	4.8	5.5	17	1.7
40 - 54	4324	19.3	2.6	40.8	6.8	3.9	7.2	5.9	12.7	0.9
55 +	4762	12.3	5.4	29.8	9.1	2.3	8.6	12.2	18.8	1.5
 <b>EDUCATION (end of)</b>										
Until 15 years of age	1311	18.5	4.3	33.9	6.9	1.2	6.3	6.4	21.4	1.2
16 - 20	6587	19.1	3.2	37.1	7.3	3.1	5.8	6.6	16.4	1.3
20 +	5804	15	3	36.2	8	3.5	7.7	9.7	15.4	1.5
Still in education	1809	19.6	1.2	32.5	10.7	4.9	4.9	6.9	18.9	0.5
 <b>URBANISATION</b>										
Metropolitan	3315	17.2	3	34.5	9.4	3	6.3	8.8	16.3	1.5
Urban	6759	16.7	2.7	36.5	8	3	5.5	7.9	18.5	1.2
Rural	5627	18.6	3.3	35.9	7	3.9	7.7	7.1	15.2	1.2
 <b>OCCUPATION</b>										
Self-employed	1607	16.5	3.6	41.1	7.2	3.6	5.7	7.1	12.2	2.8
Employee	6567	19.9	2.1	39.7	7	3.4	6.9	6.5	13.5	1.1
Manual worker	1067	20	1.8	39	5.4	3	5.3	5	19.4	1.1
Not working	6435	14.9	4	30.3	9.6	3.1	6.4	9.8	20.9	1.1

Table 6a. Method of transport for European citizens' main holiday trip in 2010– *by country*

QUESTION: Q6. How did you travel there in 2010? (what was the main method of transport?)

Base: those who made at least one holiday trip in 2010

	Total N	% Airplane	% Boat	% Train	% Bus	% Car / motorbike	% Bicycle (not motorised)	% Other	% DK/NA
 <b>EU27</b>	15757	39.3	3.3	6.5	5.9	43.7	0.3	0.8	0.2
<b>COUNTRY</b>									
 Belgium	545	39.7	0.6	5.2	4.6	48.9	0.1	0.8	0
 Bulgaria	455	5.8	0	14.4	18.6	59.4	0	1.7	0.2
 Czech Rep.	571	34.6	3.5	2.9	21.5	32.4	1.6	0	3.4
 Denmark	766	55	2.6	3.5	4.8	33.3	0.3	0.5	0.1
 Germany	1340	37.8	2.6	7.2	5.6	45.7	0.4	0.8	0
 Estonia	216	50.7	7.5	3.7	10.1	27.2	0.2	0.6	0
 Greece	550	21.3	19.9	1.3	8.2	48.5	0	0.5	0.2
 Spain	830	42.1	4	3.9	6.6	43.2	0	0.2	0
 France	967	34.7	1.9	7.7	2.7	52	0.1	1	0
 Ireland	651	77.1	4.7	2	0.6	15.4	0.1	0.1	0
 Italy	781	45.1	7.5	5.2	3.1	38.1	0	0.9	0
 Cyprus	296	85.6	2.9	0	0	11.6	0	0	0
 Latvia	193	38.9	6	7.6	14.6	32.2	0.3	0.4	0
 Lithuania	271	30.5	1.7	7.6	12.4	47.2	0	0.4	0.1
 Luxembourg	360	54.6	2.2	1.8	5.2	36	0	0.2	0
 Hungary	299	7	0	22.5	13	54.7	2.7	0	0
 Malta	225	81.8	16.2	0	0	1.3	0	0.4	0.4
 Netherlands	757	38.7	1.8	1.4	3.6	52.4	0.6	1.5	0.1
 Austria	640	42.1	0.7	3.5	5.1	47.1	0.5	0.7	0.4
 Poland	709	14.5	0.1	10.8	14.4	58.8	0.4	0.4	0.4
 Portugal	443	40.3	2.4	1.7	4	49.5	0	2	0.2
 Romania	409	10.8	0	20.7	12.5	54.8	0	1.1	0
 Slovenia	323	19.1	0.6	2.9	8.1	68.8	0.1	0.4	0
 Slovakia	405	25.8	0	6.3	18.8	48.4	0	0.1	0.6
 Finland	679	48.7	3.8	2.6	3.3	40.8	0	0.7	0.2
 Sweden	695	55.9	2.7	6.5	4.5	29.5	0.1	0.5	0.2
 United Kingdom	974	59.8	3.7	4.9	2.5	27.2	0.7	0.8	0.4
 Croatia	240	14.4	1.3	2.4	16.3	65	0	0.2	0.4
 Turkey	252	13.6	0.7	0.7	49.9	34.9	0	0	0.2
 Macedonia	287	17.3	0.4	1.5	28.2	50.3	0	1.2	1.1
 Norway	395	63.8	2.5	2.8	1.4	29	0	0	0.5

	Iceland	312	46.7	1.9	0.9	0.4	47.7	0	1.3	1
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Table 6b. Method of transport for European citizens' main holiday trip in 2010 – *by segment*

QUESTION: Q6. How did you travel there in 2010? (what was the main method of transport?)

Base: those who made at least one holiday trip in 2010










	Total N	% Airplane	% Boat	% Train	% Bus	% Car / motorbike	% Bicycle (not motorised)	% Other	% DK/NA
<b>EU27</b>	15757	39.3	3.3	6.5	5.9	43.7	0.3	0.8	0.2
 <b>SEX</b>									
Male	7778	38.6	3	6.1	4.5	46.2	0.5	0.8	0.2
Female	7979	40	3.6	6.8	7.3	41.3	0.2	0.7	0.2
 <b>AGE</b>									
15 - 24	2433	39.9	3.1	10.2	7.3	38.3	0.7	0.4	0
25 - 39	4054	40.3	3.1	5.2	3.5	47.1	0.1	0.5	0.3
40 - 54	4324	39.6	3.1	3.9	3.5	48.6	0.4	0.9	0.2
55 +	4762	37.7	3.9	7.8	9.6	39.4	0.3	1.1	0.2
 <b>EDUCATION (end of)</b>									
Until 15 years of age	1311	33.5	4.7	6	13	40.5	0.6	1.9	0
16 - 20	6587	38.3	3.3	6.6	5.8	44.9	0.2	0.8	0.2
20 +	5804	42.2	3.2	5.3	3.4	44.8	0.4	0.5	0.2
Still in education	1809	37.9	3	10.3	8.5	39	0.6	0.7	0
 <b>URBANISATION</b>									
Metropolitan	3315	42.7	3.1	7.2	5.2	40.3	0.6	0.5	0.5
Urban	6759	40.5	3.9	6.7	6.4	41.4	0.2	0.8	0.1
Rural	5627	35.8	2.8	5.8	5.8	48.5	0.3	0.9	0.1
 <b>OCCUPATION</b>									
Self-employed	1607	45	3.8	3.4	2.3	44.4	0.6	0.2	0.3
Employee	6567	43.6	2.7	4.7	3.4	44.5	0.2	0.7	0.2
Manual worker	1067	24.7	2.6	8.2	5	57.8	0.4	0.9	0.2
Not working	6435	35.9	4	8.8	9.6	40.4	0.4	1	0.1

Table 7a. How European citizens organised their main holiday trip in 2010 – *by country*

QUESTION: Q7. How did you organise your main holiday trip in 2010?

Base: those who made at least one holiday trip in 2010

	Total N	% Travel / accommodation organised individually	% Travel or accommodation booked through a travel agency	% Package tour / All Inclusive holiday booked via the Internet	% Package tour / All Inclusive holiday booked through a travel agency	% Other	% DK/NA
 <b>EU27</b>	15757	56.9	13.6	12.6	9.6	6.7	0.5
<b>COUNTRY</b>							
 Belgium	545	45.9	19.7	18.8	7.8	7.4	0.5
 Bulgaria	455	63.5	6.4	4.9	3.9	20.8	0.6
 Czech Rep.	571	40.4	29.6	9.3	13.3	4.1	3.4
 Denmark	766	50.8	9.9	14.1	14	10.1	1.1
 Germany	1340	53.4	15.1	11.7	12	7	0.7
 Estonia	216	53.6	19.4	9.3	12.3	3.5	1.8
 Greece	550	74	6.2	3.5	8.4	7.9	0
 Spain	830	61	13.7	10.1	11.8	3.2	0.1
 France	967	61.4	8.3	11.9	8.6	9.8	0
 Ireland	651	49.4	9.6	21.7	9.6	8.5	1.1
 Italy	781	53.9	25.2	14.1	5.8	0.8	0.1
 Cyprus	296	49	16.4	19.4	11.3	3.2	0.8
 Latvia	193	74.2	6.1	10.6	7	2.1	0
 Lithuania	271	73.2	13.9	1.2	2.1	9.6	0
 Luxembourg	360	56	19	12.6	10.6	1.7	0
 Hungary	299	76.3	7.4	6.2	3.9	6.2	0
 Malta	225	47.5	12.2	13.9	19.9	6.2	0.4
 Netherlands	757	46.2	10.1	27.2	9.8	6.4	0.3
 Austria	640	56.1	18.6	10.8	10	4.3	0.2
 Poland	709	72.1	12.7	3.1	5.3	6.7	0.1
 Portugal	443	52.4	14.7	14.1	4.6	14	0.3
 Romania	409	76.7	11	1	6.1	5.2	0
 Slovenia	323	63.8	22	2.3	5.9	6.1	0
 Slovakia	405	59.7	24	4.9	8.6	2.2	0.6
 Finland	679	66.3	8.2	9.5	10.9	4.9	0.2
 Sweden	695	51	10.6	16.8	10.2	9.7	1.8
 United Kingdom	974	48.6	8.7	20	13	8.6	1.1
 Croatia	240	78.4	10.7	5	3	2.6	0.3
 Turkey	252	79.8	4.2	1.5	1.5	10	3
 Macedonia	287	65.2	23.2	1.7	6.7	2.3	1





	Norway	395	52.9	10.7	15.6	6.4	13.7	0.6
	Iceland	312	79.4	5	3.4	5.6	4.5	2.1

Table 7b. How European citizens organised their main holiday trip in 2010 – *by segment*

QUESTION: Q7. How did you organise your main holiday trip in 2010?

Base: those who made at least one holiday trip in 2010

















	Total N	% Travel / accommodation organised individually	% Travel or accommodation booked through a travel agency	% Package tour/all-inclusive holiday booked via the Internet	% Package tour / all-inclusive holiday booked through a travel agency	% Other	% DK/NA
<b>EU27</b>	15757	56.9	13.6	12.6	9.6	6.7	0.5
 <b>SEX</b>							
Male	7778	59.3	13.4	12.2	8.5	6.2	0.5
Female	7979	54.5	13.9	13	10.8	7.3	0.5
 <b>AGE</b>							
15 - 24	2433	57.3	10.6	14.8	8.2	8	1.1
25 - 39	4054	60	11	15.9	7.3	5.5	0.4
40 - 54	4324	58.1	13.8	13.7	8.9	5.4	0.2
55 +	4762	52.8	17.3	7.6	13.2	8.5	0.5
 <b>EDUCATION (end of)</b>							
Until 15 years of age	1311	51.6	18.4	8.5	12.1	8.8	0.7
16 - 20	6587	54.5	14.8	13.2	10.4	6.6	0.6
20 +	5804	60.6	12.3	11.9	9	6	0.2
Still in education	1809	57.6	9.9	16.3	7.4	7.9	0.9
 <b>URBANISATION</b>							
Metropolitan	3315	59.4	13.3	11.9	9	5.8	0.6
Urban	6759	57.8	14	12.2	9.1	6.5	0.4
Rural	5627	54.3	13.5	13.4	10.6	7.6	0.5
 <b>OCCUPATION</b>							
Self-employed	1607	59.5	15.9	12.6	7.7	3.8	0.5
Employee	6567	56.6	12.5	15.1	9.6	5.8	0.4
Manual worker	1067	65.2	12.8	12.5	5.5	3.8	0.3
Not working	6435	55.3	14.3	9.9	10.9	8.8	0.6

Table 8a. Holiday leisure activities that European citizens would reduce most to save money when on holiday – *by country*

QUESTION: Q8. When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?

	Total N	% Entertainment (movies; theatres)	% Restaurants and cafes	% Shopping	% Beauty/Wellness treatments	% Sports and other activities	% None (I would not reduce any)	% All of these	% DK/NA
 <b>EU27</b>	27125	10.4	11.5	21.2	26.7	11.3	9.3	5.9	3.7
<b>COUNTRY</b>									
 Belgium	1002	5.9	9.2	17.5	34.2	10.1	14	5	4.1
 Bulgaria	1000	9.8	18.4	15.2	8.4	12	9.1	21.1	6
 Czech Rep.	1000	15.6	9.7	19.2	22	11.7	14.2	4.2	3.3
 Denmark	1005	7.2	5.6	17.8	37.1	18	9.1	2.3	2.9
 Germany	2009	11.6	6.7	28.8	29	9.7	9.1	2.8	2.2
 Estonia	516	7.6	20.8	22.1	18.7	7.5	8.6	9.8	5
 Greece	1000	8.6	8.3	21.1	31.6	6.2	6.4	11.8	6.1
 Spain	1505	7.7	11.6	16.9	30.4	8.2	12.7	10	2.4
 France	1506	10.3	15.9	24.4	24.8	9.8	9.6	3.2	2.1
 Ireland	1000	12.4	19.7	25.7	21.7	15.4	3.3	0.6	1.2
 Italy	1510	14.2	6.4	21.5	26.6	15.5	6.7	5.7	3.3
 Cyprus	503	10	7.3	29.8	25.2	9	13.5	3.8	1.5
 Latvia	505	10.9	25.5	16.8	11.3	12	8	10.5	4.9
 Lithuania	502	8.4	21	22.5	13.1	8.8	9.7	8.7	7.8
 Luxembourg	501	11.5	7.2	28.9	27.8	14.5	6.3	2.3	1.5
 Hungary	1006	9.5	11.5	17	26.2	7.9	8.9	14.7	4.3
 Malta	500	5.5	8.2	18.7	37	15.3	9.4	3.2	2.7
 Netherlands	1000	7.4	11	14.4	36.6	12.3	11.5	4.2	2.6
 Austria	1001	7.6	5.8	35	29.4	10.3	7.6	2.2	2.2
 Poland	1507	12.3	12.5	15.2	31.9	7.8	8.1	5.9	6.3
 Portugal	1007	8	17.2	18	14.3	5.1	13.8	18.9	4.7
 Romania	1013	7.5	21.6	12.4	11.9	6.5	12.2	14.8	13.2
 Slovenia	503	7.6	14.9	29.5	22.8	4.9	12.9	5.4	1.8
 Slovakia	1021	12.3	9	26.1	20.9	9.6	13.8	5.3	2.9
 Finland	1000	15.1	14	16.8	15.9	11.7	15.6	8.6	2.4
 Sweden	1003	6.3	7.5	25.2	26.9	14.2	14.1	1.8	4
 United Kingdom	1500	9.4	13.6	19.4	27.4	19.2	5.9	1.9	3.3
 Croatia	505	9.4	20.1	18.8	22	8.2	5.7	10.7	5.2
 Turkey	1001	16.5	4.5	16.1	11.9	8.4	29	6.3	7.3
 Macedonia	556	12.3	13.6	19.6	20.5	9.3	13.7	9.4	1.7
 Norway	500	7.3	9.2	23.9	24.6	15.5	11.8	3.2	4.5

	Iceland	500	6.7	10.5	22.9	22.1	7.7	13.6	6.7	9.8
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Table 8b. Holiday leisure activities that European citizens would reduce most to save money when on holiday – *by segment*

QUESTION: Q8. When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?






	Total N	% Entertainment (movies; theatres)	% Restaurants and cafes	% Shopping	% Beauty/Wellness treatments	% Sports and other activities	% None (I would not reduce any)	% All of these	% DK/NA
<b>EU27</b>	27125	10.4	11.5	21.2	26.7	11.3	9.3	5.9	3.7
 <b>SEX</b>									
Male	13106	10.7	11.4	20.8	28.6	9.4	10.4	5.1	3.5
Female	14019	10.1	11.5	21.6	24.9	13.1	8.4	6.6	3.8
 <b>AGE</b>									
15 - 24	3793	14.8	11.8	19.7	31.5	12.7	6.1	2.2	1.2
25 - 39	6339	10.7	11.7	22	31.3	11	7.6	3.9	1.7
40 - 54	7229	10.7	11	22.2	28.6	11.6	9.1	4.8	2
55 +	9394	8.4	11.7	20.6	20.2	10.7	11.8	9.5	7
 <b>EDUCATION (end of)</b>									
Until 15 years of age	3672	10.3	10.9	19	17.7	10.5	10.7	12.7	8.2
16 - 20	11931	10.7	12	21.3	25.6	12.3	9.1	5.5	3.4
20 +	8210	8.8	11	23	31.5	10.3	9.4	4	1.9
Still in education	2683	15.6	11.8	20.6	30.8	12.1	6.3	1.7	1.1
 <b>URBANISATION</b>									
Metropolitan	5124	10	10.7	22.7	28.6	11.1	9.3	5.1	2.5
Urban	11567	11	11.4	20.3	26.2	12	9.5	6.2	3.5
Rural	10301	9.9	11.9	21.6	26.5	10.8	9.2	5.8	4.3
 <b>OCCUPATION</b>									
Self-employed	2571	9.1	8.9	23.3	29.1	11.7	10.8	4.3	2.8
Employee	9392	10.2	11.7	22.7	31.1	11.9	8	3.2	1.2
Manual worker	2206	11.2	12.2	21.8	25.5	9.3	9.4	7.3	3.2
Not working	12811	10.6	11.7	19.8	23.3	11.2	10	7.8	5.7

Table 9a. Preferred holiday destinations – *by country*

QUESTION: Q9. What type of holiday destinations do you prefer?


































		Total N	% Traditional, well-known destinations	% Non-traditional, emerging destinations	% Not important, no preference	% DK/NA
	<b>EU27</b>	27125	57.7	27.6	13	1.7
	<b>COUNTRY</b>					
	Belgium	1002	50.7	28.8	19	1.6
	Bulgaria	1000	50.5	26.4	16.4	6.7
	Czech Rep.	1000	62.2	23.8	12.1	1.9
	Denmark	1005	44.4	40.4	13.5	1.8
	Germany	2009	57.1	27.2	14.7	1.1
	Estonia	516	47.3	27.4	19.9	5.4
	Greece	1000	64.9	24.8	9	1.4
	Spain	1505	60.3	28.3	10.8	0.6
	France	1506	56.2	32	11	0.9
	Ireland	1000	60.1	31.9	6.8	1.2
	Italy	1510	64.2	24.9	10.8	0.2
	Cyprus	503	57.1	25.7	16.9	0.3
	Latvia	505	51.3	38.5	9.3	0.9
	Lithuania	502	52.9	29.6	13.3	4.3
	Luxembourg	501	57.8	35.6	6.4	0.1
	Hungary	1006	56.1	21.5	20.3	2.1
	Malta	500	64.2	21.6	12.8	1.3
	Netherlands	1000	50.2	39.7	9.2	0.9
	Austria	1001	57.4	29.1	12.2	1.3
	Poland	1507	62.2	20.9	12.6	4.3
	Portugal	1007	45.5	31.7	20	2.8
	Romania	1013	54.8	14.7	23.8	6.7
	Slovenia	503	59.4	29.5	8.9	2.3
	Slovakia	1021	69.2	16.9	11.7	2.2
	Finland	1000	47.8	31.8	17.4	3
	Sweden	1003	48.6	35.6	14.9	0.9
	United Kingdom	1500	57.3	30.6	10.7	1.5
	Croatia	505	57.6	34.3	5.5	2.6
	Turkey	1001	61.3	19.1	18.4	1.3
	Macedonia	556	44	44.4	11.2	0.4
	Norway	500	46.3	43.5	8.8	1.5
	Iceland	500	35.4	42.9	20.4	1.3

Table 9b. Preferred holiday destinations – *by segment*

QUESTION: Q9. What type of holiday destinations do you prefer?






		Total N	% Traditional, well-known destinations	% Non- traditional, emerging destinations	% Not important, no preference	% DK/NA
	<b>EU27</b>	27125	57.7	27.6	13	1.7
	<b>SEX</b>					
	Male	13106	56.8	28.3	13.6	1.3
	Female	14019	58.6	27	12.3	2.1
	<b>AGE</b>					
	15 - 24	3793	50.3	36.8	12.5	0.4
	25 - 39	6339	54.3	32	12.8	1
	40 - 54	7229	60	26.4	12.5	1.1
	55 +	9394	61.4	22.1	13.5	3
	<b>EDUCATION (end of)</b>					
	Until 15 years of age	3672	64.9	17.6	13.4	4.1
	16 - 20	11931	60.7	25.2	12.7	1.4
	20 +	8210	53.4	32.5	13.1	1
	Still in education	2683	49	38.7	11.9	0.4
	<b>URBANISATION</b>					
	Metropolitan	5124	56.5	29.1	13.3	1.1
	Urban	11567	59	27.4	12.1	1.5
	Rural	10301	56.9	27.2	13.8	2.1
	<b>OCCUPATION</b>					
	Self-employed	2571	54.8	29.6	13.7	1.9
	Employee	9392	55.7	30.9	12.8	0.6
	Manual worker	2206	59.4	25.3	13.8	1.5
	Not working	12811	59.6	25.2	12.7	2.4

Table 10a. The main expectations from a non-traditional, emerging destination – *by country*

QUESTION: Q10. What would be your main expectation from a non-traditional, emerging destination?


































		Total N	% Better quality of service	% Lower prices	% Better value for money	% Local culture, lifestyle and traditions	% Better environmental quality	% DK/NA
	<b>EU27</b>	27125	8.8	16.9	21.2	35.7	11.1	6.3
	<b>COUNTRY</b>							
	Belgium	1002	11.4	16.3	15.9	32.8	12.9	10.6
	Bulgaria	1000	10.9	22.7	22.7	22	12.2	9.6
	Czech Rep.	1000	15.3	21.7	18.4	30	10.8	3.9
	Denmark	1005	6.9	9.3	10.7	62.8	6	4.3
	Germany	2009	8.2	9.1	23.4	36.8	14.8	7.6
	Estonia	516	9.6	17.6	20.8	35	8.3	8.7
	Greece	1000	13.1	23.1	11.1	28.6	19.1	5.1
	Spain	1505	10	14.3	28	33.6	9.4	4.6
	France	1506	5.5	14.7	19.7	43	11.9	5.1
	Ireland	1000	12.2	12.6	29.8	35.2	7.5	2.7
	Italy	1510	6.5	18.8	24.9	33.9	12.7	3.2
	Cyprus	503	14.6	20.3	8.1	41.1	12	3.8
	Latvia	505	5.6	10.4	10.9	54.1	9.4	9.5
	Lithuania	502	7.5	25.5	25.6	24	7.9	9.5
	Luxembourg	501	12.1	12.9	18.2	41	11.8	4
	Hungary	1006	9.5	32.8	19	21.6	11.7	5.4
	Malta	500	7.2	22	11.6	36.8	12.3	10
	Netherlands	1000	3.9	8.2	6.9	61.5	8.2	11.4
	Austria	1001	7.7	10.3	20.5	39.6	13.7	8.2
	Poland	1507	10.9	38.1	14.7	22.1	6.3	7.9
	Portugal	1007	4.8	15.9	25.8	28.5	15.9	9
	Romania	1013	14.1	30.8	23.8	11.5	8.6	11.1
	Slovenia	503	12.3	24	5.9	35.9	14.6	7.2
	Slovakia	1021	13.7	22.1	20.7	29.9	7.7	6
	Finland	1000	7.6	16.6	10.3	53.3	8.1	4.1
	Sweden	1003	7.2	9.8	10.8	50.9	11.8	9.6
	United Kingdom	1500	10	11	24.4	42.4	7.4	4.9
	Croatia	505	19.8	21.6	5.1	32.3	16.9	4.3
	Turkey	1001	23.1	27.4	12.1	19	15	3.3
	Macedonia	556	14.1	29.5	8.3	36.6	10.1	1.4
	Norway	500	7.8	11.7	11.4	54	8.2	6.9
	Iceland	500	5.8	7.6	9.1	51.2	8.3	18.1



Table 10b. The main expectations from a non-traditional, emerging destination – *by segment*

QUESTION: Q10. What would be your main expectation from a non-traditional, emerging destination?









	Total N	% Better quality of service	% Lower prices	% Better value for money	% Local culture, lifestyle and traditions	% Better environmental quality	% DK/NA
<b>EU27</b>	27125	8.8	16.9	21.2	35.7	11.1	6.3
 <b>SEX</b>							
Male	13106	9.2	15.7	22.9	35	11.5	5.8
Female	14019	8.3	18.1	19.6	36.4	10.7	6.9
 <b>AGE</b>							
15 - 24	3793	9.8	17.6	22.1	36.2	12	2.4
25 - 39	6339	9	17.9	24.5	35.1	10.4	3.2
40 - 54	7229	9.5	15.2	21.7	37.7	11.1	4.8
55 +	9394	7.7	17.4	18.4	34.1	11.1	11.2
 <b>EDUCATION (end of)</b>							
Until 15 years of age	3672	8.1	24.6	22.3	22.1	11.1	11.9
16 - 20	11931	9.5	19.6	22.6	32.5	10.1	5.9
20 +	8210	7.9	10.1	19.3	45.9	12.1	4.8
Still in education	2683	9.4	15.9	20.7	39.5	12.9	1.7
 <b>URBANISATION</b>							
Metropolitan	5124	9	14.8	19.5	39.4	12	5.3
Urban	11567	9.1	17.3	21.4	36	10.6	5.7
Rural	10301	8.4	17.5	21.7	33.7	11.2	7.5
 <b>OCCUPATION</b>							
Self-employed	2571	10.3	12.8	20.9	39	11.2	5.8
Employee	9392	8.9	12.8	22.9	40.8	10.8	3.9
Manual worker	2206	10	24.7	24	27.5	10.2	3.6
Not working	12811	8.2	19.5	19.6	32.6	11.4	8.7

Table 11a. Information sources when deciding about holidays – *most important* – by country

QUESTION: Q11A. From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?

	Total N	% Personal experience	% Recommendations of friends and colleagues	% Guidebooks and magazines (commercial)	% Catalogues, brochures (non-commercial)	% The Internet	% Travel / tourist agencies	% Media (newspaper, radio, TV)	% DK/NA
 <b>EU27</b>	27125	17.5	28.7	5.4	4.6	26.5	10.8	3.6	2.9
<b>COUNTRY</b>									
 Belgium	1002	16.5	23.4	5.8	8.5	25.9	14.9	2	2.9
 Bulgaria	1000	36.7	29	0.8	1.6	16.3	4.6	3.6	7.5
 Czech Rep.	1000	24.1	33	8.1	8.4	13.2	7.4	2.8	3
 Denmark	1005	16.9	23.4	5.8	6.9	37.9	3	3.9	2.2
 Germany	2009	14.1	26.3	7	4.6	30.6	11.7	4.3	1.4
 Estonia	516	16.8	34.6	2.9	3.4	24.6	9.8	3.2	4.7
 Greece	1000	15	31.3	6.8	2.4	26.3	9.3	6.5	2.5
 Spain	1505	16.7	33.5	2.7	2.5	22.7	16.9	2.7	2.3
 France	1506	17.2	27.3	5.8	7.4	26.5	11	2.7	2.1
 Ireland	1000	16.6	39.2	3.3	2.4	26.9	4.6	5.3	1.7
 Italy	1510	14.6	21.4	5.9	3.5	31.8	19.8	1.5	1.5
 Cyprus	503	12.3	29.6	8.7	4.1	30.3	11	3.2	0.9
 Latvia	505	20.5	43.4	3.5	1.8	23.4	2.9	2.9	1.8
 Lithuania	502	22.1	41.3	4.1	1.9	17.5	3.8	3.9	5.4
 Luxembourg	501	18.7	21.7	7.8	8.7	24.8	12.7	5.1	0.5
 Hungary	1006	29	33.2	5.6	6.3	16.2	3.2	4.6	1.8
 Malta	500	15	22.5	4.6	6.2	26.4	13.6	8.3	3.3
 Netherlands	1000	15.4	19	5.4	5.5	42.2	6.7	4	1.9
 Austria	1001	9.9	28	7	5.7	28.2	12.6	5.5	3.2
 Poland	1507	22.1	34	4.8	2.8	21.8	5.2	3.7	5.6
 Portugal	1007	14.4	33.4	3.3	2.3	21.4	10.8	4.7	9.7
 Romania	1013	23.8	24.1	2.3	1.9	19	7.8	8.9	12.1
 Slovenia	503	18.4	36.8	3.2	7.2	18.9	9.2	3.9	2.5
 Slovakia	1021	24.1	34.1	3.3	5.4	16.4	12.1	2.6	2
 Finland	1000	11.8	20	5.8	5.2	43	5.7	7.4	1.3
 Sweden	1003	12.3	32.4	5.1	6.1	31.4	6.4	4.1	2
 United Kingdom	1500	18.5	33.9	6.5	5.3	24.6	6.1	3	2
 Croatia	505	23.3	36.9	2.1	2.1	21.4	6.5	3.5	4.2
 Turkey	1001	27.4	23.6	3.4	3	20.8	11.8	5.4	4.7
 Macedonia	556	21.7	26.4	1.8	3.6	24.6	15.3	5.9	0.7
 Norway	500	12.6	26.2	4.7	5.2	39	2.3	7.7	2.3

	Iceland	500	13.1	23	7.2	5	41.5	4.5	3.3	2.4
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Table 11b. Information sources when deciding about holidays – *most important* – by segment

QUESTION: Q11A. From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?



















	Total N	% Personal experience	% Recommendations of friends and colleagues	% Guidebooks and magazines (commercial)	% Catalogues, brochures (non-commercial)	% The Internet	% Travel / tourist agencies	% Media (newspaper, radio, TV)	% DK/NA
<b>EU27</b>	27125	17.5	28.7	5.4	4.6	26.5	10.8	3.6	2.9
 <b>SEX</b>									
Male	13106	18.8	26.9	5.2	3.9	30	8.8	3.7	2.7
Female	14019	16.2	30.4	5.6	5.2	23.2	12.7	3.5	3.1
 <b>AGE</b>									
15 - 24	3793	15.4	30.9	4	2.8	35.5	7.4	3.2	0.9
25 - 39	6339	15.3	30.9	4.4	2.4	35.4	8.1	2.2	1.2
40 - 54	7229	16	29.9	5.7	4	30.2	9.1	3.3	1.6
55 +	9394	20.9	25.6	6.2	7.1	14.4	15.2	4.9	5.7
 <b>EDUCATION (end of)</b>									
Until 15 years of age	3672	19.6	26.8	4.5	5.8	10.9	19.3	4.3	8.8
16 - 20	11931	18.7	29.1	4.8	4.7	26	10.9	3.6	2.1
20 +	8210	15.6	28.7	6.9	4.3	32.3	7.6	3.4	1.3
Still in education	2683	14.6	30.8	4.7	3	35.4	7.7	2.9	0.9
 <b>URBANISATION</b>									
Metropolitan	5124	18.4	28.2	6.3	4.4	28.9	8.9	3	1.8
Urban	11567	17.9	28.1	5.7	4.5	26.5	11.3	3.4	2.7
Rural	10301	16.4	29.7	4.8	4.7	25.4	11.1	4.2	3.7
 <b>OCCUPATION</b>									
Self-employed	2571	16.4	29.7	5	2.2	32.2	8.3	3.6	2.6
Employee	9392	15.1	29.1	5.9	3.6	34.7	8	2.8	0.8
Manual worker	2206	19.9	30.9	3.3	4.4	24.5	11.5	3.5	2.1
Not working	12811	19.1	27.8	5.5	5.8	19.7	13.2	4.2	4.7

Table 12a. Information sources when deciding about holidays – *second most important – by country*

QUESTION: Q11B. And what is the second most important?

Base: those who mentioned an information source

	Total N	% Personal experience	% Recommendations of friends and colleagues	% Guidebooks and magazines (commercial)	% Catalogues, brochures (non-commercial)	% The Internet	% Travel / tourist agencies	% Media (newspaper, radio, TV)	% DK/NA
 <b>EU27</b>	26333	12.1	30.4	7.9	8.7	18.7	10.9	6.3	5
<b>COUNTRY</b>									
 Belgium	973	14	22	6.4	12.1	19.4	10.8	5.9	9.6
 Bulgaria	925	16	37.4	3.2	4.6	16.5	7.1	6	9.3
 Czech Rep.	970	16.3	32.9	10.6	11	15.7	8.5	3.4	1.7
 Denmark	982	9.8	31.2	8.4	12.8	20.5	5.4	9.2	2.8
 Germany	1982	10.4	30.1	9.3	10.2	19	11.5	6.6	3.1
 Estonia	492	14.3	33.3	4.2	4.1	18.6	13.3	6.1	6.2
 Greece	975	12	28.8	11	6.2	19.3	8.7	6.4	7.6
 Spain	1470	10.8	26.9	3.3	7.2	18.6	17.6	4.8	10.8
 France	1475	9.7	28.7	8.1	10.5	19.5	10	6	7.4
 Ireland	983	12.3	29.6	7.8	8.9	23.4	7.3	9.3	1.4
 Italy	1488	12.6	32.4	6.7	9.9	15.9	16	4	2.5
 Cyprus	498	9.1	32.4	8.8	8.1	15.8	13.7	8.1	4
 Latvia	496	14.4	26.9	7.8	7.1	18.4	13.1	6.6	5.7
 Lithuania	475	11.9	31.7	5.2	2.6	18.8	12.8	8.8	8.3
 Luxembourg	498	12.4	27	8.8	12.2	16.6	15.3	4.6	3.1
 Hungary	987	15.6	36.7	11.8	9.6	10.9	3.6	7.1	4.6
 Malta	483	12.4	23.5	7.2	9.1	22.4	10.6	6.4	8.3
 Netherlands	981	11.2	31.2	7.5	9.4	22.8	6.4	6.2	5.3
 Austria	969	13.9	28.8	7.9	8.4	18.3	13	7.7	2
 Poland	1423	16.6	33.4	8.7	6.3	18.5	6.1	6.6	3.9
 Portugal	909	13.7	29.3	8.2	5.4	15.8	11.7	6	10
 Romania	890	13.5	32.8	5.8	3.3	18.1	10.4	10.8	5.3
 Slovenia	491	10.8	23.8	3.9	17.4	21.5	13.1	5.9	3.6
 Slovakia	1000	18.2	32.9	5.5	11.4	11.7	12.9	3.8	3.6
 Finland	987	10.4	32.3	8.4	9.3	18.1	6.6	10.8	4.1
 Sweden	983	7.9	30.1	6.1	8.6	23.7	8	7.1	8.5
 United Kingdom	1470	12.4	29.9	10.4	7.8	21.4	8	7.4	2.7
 Croatia	484	14.5	32.6	3.2	5.3	17	7.2	9	11.1
 Turkey	954	17.4	29.4	5.6	7.8	14.5	10.6	7.5	7.1
 Macedonia	552	12.4	28.9	3.7	6.1	17.4	16.7	12.3	2.5



	Norway	488	9.5	34.5	6.6	8.5	21.2	2.5	10	7.2
	Iceland	488	14.6	30.3	6.7	10.5	18.8	6.7	6.7	5.7

Table 12b. Information sources when deciding about holidays – *second most important – by segment*

QUESTION: Q11B. And what is the second most important?

Base: those who mentioned an information source





















	Total N	% Personal experience	% Recommendations of friends and colleagues	% Guidebooks and magazines (commercial)	% Catalogues, brochures (non-commercial)	% The Internet	% Travel / tourist agencies	% Media (newspaper, radio, TV)	% DK/NA
<b>EU27</b>	26333	12.1	30.4	7.9	8.7	18.7	10.9	6.3	5
 <b>SEX</b>									
Male	12755	12.2	31.1	7.7	8	19.7	9.7	6.7	4.8
Female	13578	12.1	29.7	8	9.4	17.8	11.9	5.9	5.2
 <b>AGE</b>									
15 - 24	3758	12.1	32.9	7	6.6	23	9.7	6.4	2.2
25 - 39	6260	12.2	32.5	6.4	6.7	22.7	10.7	5.9	2.8
40 - 54	7110	11.4	30.1	8.5	8.5	21.3	10.3	6.2	3.6
55 +	8861	12.8	28.1	8.6	11	12	11.9	6.6	8.9
 <b>EDUCATION (end of)</b>									
Until 15 years of age	3348	13.4	29.6	6	11.1	9.1	14.5	6	10.3
16 - 20	11683	12.2	30	7.3	8.9	18.5	11.7	6.4	4.9
20 +	8105	11.3	30.6	9.8	8	22.4	8.6	6.2	3.1
Still in education	2659	13.2	32.9	7.1	7.3	22.1	8.8	5.9	2.7
 <b>URBANISATION</b>									
Metropolitan	5033	12.6	31.3	8.5	7.4	21.3	8.5	6.2	4.2
Urban	11257	12.2	30.9	7.6	8.6	18.7	11.2	6.3	4.4
Rural	9922	11.9	29.2	7.8	9.5	17.5	11.7	6.3	6
 <b>OCCUPATION</b>									
Self-employed	2505	13.9	31.3	7.5	8.2	19.6	9.7	5.4	4.3
Employee	9316	11.1	31.4	8.2	7.6	23.4	10	5.7	2.5
Manual worker	2160	11.4	29.6	5.7	7.9	21	13.1	6.9	4.4
Not working	12208	12.7	29.6	8	9.8	14.5	11.4	6.8	7.2

Table 13a. Attractions influencing the choice of destination – *by country*

QUESTION: Q12. From the following attractions, please choose the one that has the major influence on your choice of destination?

	Total N	% Art	% Gastronomy	% Entertainment	% Cultural heritage	% Festivals and other events	% The environment	% Others	% DK/NA
 <b>EU27</b>	27125	6	6.5	14.1	27	4.9	31.6	7.3	2.6
<b>COUNTRY</b>									
 Belgium	1002	4.9	11.9	19	28.7	1.4	24.7	7.4	2
 Bulgaria	1000	4.2	2.5	20.1	27.2	4.1	26.9	6.9	8.1
 Czech Rep.	1000	8.2	6.2	22.6	24	7	20.7	9.6	1.6
 Denmark	1005	3.2	7.1	8.9	35.2	6	19	18.5	2.1
 Germany	2009	3	3.9	6.2	22.8	4.3	52.4	5.5	1.9
 Estonia	516	4.2	2.2	19	31.6	6.7	24.1	9.3	2.8
 Greece	1000	7.5	2.7	16.6	32.4	3.3	32.5	3.6	1.5
 Spain	1505	11.1	11.7	19.3	26	5.7	19	5.6	1.6
 France	1506	6.2	8.7	16.5	28.1	5.5	29.1	4.9	0.9
 Ireland	1000	3.1	3.7	24.5	30.8	10	14.2	12.4	1.4
 Italy	1510	12.4	8.7	7.4	30.7	2.1	36.3	1.5	0.9
 Cyprus	503	4.9	3.9	28.9	33.9	5	19.6	3.5	0.3
 Latvia	505	9.5	3.1	11	30.4	6.5	33.7	2.9	2.9
 Lithuania	502	3.9	2.6	15.9	29.4	4.6	35.7	3.1	4.7
 Luxembourg	501	4.9	10.7	16.1	26.1	3	34.7	3.4	1.1
 Hungary	1006	4.4	5.3	14.4	21.4	9.3	37.2	5.6	2.3
 Malta	500	7	4.3	17.9	26.2	4.9	33.6	3.8	2.3
 Netherlands	1000	3.8	6	14.4	40.9	3.6	12.4	17.6	1.4
 Austria	1001	2.7	7.1	7.5	28	5.3	40.2	7	2.2
 Poland	1507	4.9	4.7	16.8	21.7	5.1	34	7.4	5.5
 Portugal	1007	5	7.9	9.7	35.7	4.4	22.8	10.2	4.4
 Romania	1013	7.7	3.3	16.9	14.5	10	29.2	5.2	13.2
 Slovenia	503	3.2	7.9	13.9	28.9	7.3	33.7	3.7	1.4
 Slovakia	1021	2.8	8.7	19.3	26.9	3.1	26.5	10.4	2.4
 Finland	1000	3.2	4.7	6.3	28.1	4.6	41	11.3	0.8
 Sweden	1003	1.7	6.6	7.9	28.8	6	36.2	11	1.7
 United Kingdom	1500	2.8	5.1	21.7	29.7	5.1	17.7	15.8	2.1
 Croatia	505	4.3	7.4	22.6	24.7	1.4	33.3	3.5	2.8
 Turkey	1001	3	1.4	18.1	42.5	4.8	25.5	1.4	3.2
 Macedonia	556	6.9	5.5	24.6	33.9	5.2	18.8	3.8	1.2
 Norway	500	4.5	4.6	7.4	32.4	7.8	17.7	22	3.5




	Iceland	500	2.2	2.5	17.3	20.6	6	40.2	7.9	3.5
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Table 13b. Attractions influencing the choice of destination – *by segment*

QUESTION: Q12. From the following attractions, please choose the one that has the major influence on your choice of destination?






	Total N	% Art	% Gastronomy	% Entertainment	% Cultural heritage	% Festivals and other events	% The environment	% Others	% DK/NA
<b>EU27</b>	27125	6	6.5	14.1	27	4.9	31.6	7.3	2.6
 <b>SEX</b>									
Male	13106	4.9	7.6	14.7	25.5	5.1	32.2	7.6	2.4
Female	14019	7	5.5	13.6	28.5	4.7	30.9	7	2.8
 <b>AGE</b>									
15 - 24	3793	5.2	3.8	28.9	16.1	13.7	26.8	4.5	0.9
25 - 39	6339	4.3	7.8	19.2	24.1	5.3	30.5	7.5	1.2
40 - 54	7229	5.3	7.1	11.6	27.8	3.2	35.4	7.9	1.8
55 +	9394	8	6.3	7.1	32.5	2.5	31.4	7.7	4.6
 <b>EDUCATION (end of)</b>									
Until 15 years of age	3672	6.3	8.5	11.4	23.8	3.7	30.4	8.9	7.1
16 - 20	11931	5.5	7.5	14.7	24.9	4.8	33.2	7.4	2
20 +	8210	6.9	5.4	10	34.5	3.3	32	6.8	1.2
Still in education	2683	5.7	3.1	28.9	18.7	12.6	25.3	5	0.6
 <b>URBANISATION</b>									
Metropolitan	5124	6.4	5.9	12.1	31	4	31	8	1.5
Urban	11567	7	6.1	15.3	28.3	4.5	29.6	7	2.3
Rural	10301	4.7	7.3	13.9	23.7	5.8	34	7.3	3.3
 <b>OCCUPATION</b>									
Self-employed	2571	6.1	8	11.9	28.1	4.2	31.8	7.5	2.4
Employee	9392	4.5	6.5	14.2	29.1	4.3	32.1	8.4	1
Manual worker	2206	3.8	9.3	16.9	19	6.8	36.8	5.6	1.8
Not working	12811	7.4	5.8	14.1	26.6	5.2	30.3	6.7	3.9

Table 14a. Planned destination of the main holiday in 2011 – *by country*

QUESTION: Q13. Where do you plan to spend your main holiday in 2011?

		Total N	% Resident country	% EU27	% EFTA	% EU Candidate countries	% Other European countries	% North America	% Asia	% Africa	% Pacific	% Middle and South America	% Other country	% Will not go on holiday	% DK/NA
	<b>EU27</b>	27125	37.7	19.9	0.8	2.8	0.2	2.7	2.4	1.6	0.7	1.7	2.8	4	22.8
	<b>COUNTRY</b>														
	Belgium	1002	24.2	38.4	1.3	3.5	0	1.7	2.2	1.4	0.4	1.3	1.9	0.7	22.9
	Bulgaria	1000	54.8	6	0.2	1.1	0.3	0.8	0.4	0.1	0	0.1	3.4	11.8	21.1
	Czech Rep.	1000	32.4	24.8	1.8	9.2	1.4	0.4	2.2	1.7	0.5	1.1	0.2	1.7	22.6
	Denmark	1005	26.7	37.4	1.9	5.5	0.1	3.9	4.7	2.3	1.4	0.8	2	0.2	12.9
	Germany	2009	25	28.3	1.7	5.1	0.1	2.4	2.4	1.5	0.8	1.5	3.4	1.9	26.1
	Estonia	516	43.7	26.3	1.9	3.8	1.9	0.2	5.6	1.7	0.3	0	0.7	1.1	12.7
	Greece	1000	68.1	7.2	0.2	0.8	0.3	1.2	0.8	0.3	0.2	0.3	0.4	1.1	19.3
	Spain	1505	48	12.9	0.8	0.5	0.1	1.8	1.3	1.4	0.3	4.7	1.2	9.6	17.3
	France	1506	42.6	15.1	0.5	1.6	0.1	2.9	4	3.3	0.9	1.5	2.6	1.3	23.7
	Ireland	1000	17.9	35.3	0.1	1.1	0.2	10	2.2	2.6	1.5	1.7	0.6	0.4	26.5
	Italy	1510	62.8	14.6	0.6	1	0	3.5	2.1	1.2	0.4	1.6	0.6	0	11.5
	Cyprus	503	29	41.4	0.6	0.3	0	3.3	1.5	0.9	0.5	0.3	0.4	0.4	21.4
	Latvia	505	41.8	23.7	0.5	1.2	1	0.3	3.2	0.5	0.1	0	0.9	5.6	21.2
	Lithuania	502	31.5	20.8	1.7	2.5	0.9	1.2	1.8	0.2	0.1	0.2	0.8	0.9	37.5
	Luxembourg	501	7.7	47.1	1.2	4.7	0	4.3	2.8	2.8	0.1	2.3	2.7	0.3	23.9
	Hungary	1006	36	11.5	0.2	2.3	0.1	0.8	0.9	0.5	0.1	0.1	0.4	18	29.1
	Malta	500	28.3	38.6	0.4	0.5	0	1.9	2	0.6	1.1	0.8	3.5	2.4	20
	Netherlands	1000	22.4	35.2	1.9	3.9	0.2	3.2	3.2	1.5	1	2	2.7	2.2	20.8
	Austria	1001	32.2	24.3	1.1	7.6	0.5	2.2	4.5	1.2	0.8	1.7	2.6	2	19.2
	Poland	1507	29.4	11.7	0.4	2.8	0.4	0.4	1.3	1	0.1	0.1	8	5.5	38.9
	Portugal	1007	58.1	10.1	0.9	0.2	0.3	1.1	1	1	0.3	2.9	0.8	7.7	15.6
	Romania	1013	33.5	19	0.1	2	0.1	0.7	0.5	0.1	0.1	0.1	9.3	21.3	13.1
	Slovenia	503	29.3	5.7	0	27.9	1.2	0.3	0.7	2.6	0	1.7	1.8	2.3	26.4
	Slovakia	1021	32.7	21.5	0.4	11.1	0.1	0.7	0.7	1.2	0.4	0.3	2	8.9	19.9
	Finland	1000	49.5	21.7	1	1.2	0.2	2.8	5	0.7	0.4	0.9	1.1	0.5	15.1
	Sweden	1003	40.4	25.1	1.3	3.6	0.9	3.9	4.8	1	0.6	0.7	3	0.9	13.8
	United Kingdom	1500	23.1	23.4	0.5	2.2	0.1	6.3	3	2.7	1.9	2.7	2.3	1.5	30.4
	Croatia	505	77.2	9	0.1	0.6	1.1	0.3	0.2	0.5	0.3	0.2	0	5.2	5.4
	Turkey	1001	77.7	6.8	0	0	0	0.6	1.3	0.8	0.5	0	0.6	2.9	9
	Macedonia	556	10.9	21.1	3	13.8	5.7	2	0.3	0	0	0	6.6	9.5	27
	Norway	500	29.5	29.6	0.2	5.4	0.3	2.7	5.1	1.6	1.9	0.6	2	0.6	20.7







	Iceland	500	26.5	26.4	0.6	0.1	0.3	6.9	2.1	0.6	0.1	0	3.7	2.3	30.4
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Table 14b. Planned destination of the main holiday in 2011 – *by segment*

QUESTION: Q13. Where do you plan to spend your main holiday in 2011?

	Total N	% Resident country	% EU27	% EFTA	% EU Candidate countries	% Other European countries	% North America	% Asia	% Africa	% Pacific	% Middle and South America	% Other country	% Will not go on holiday	% DK/NA
<b>EU27</b>	27125	37.7	19.9	0.8	2.8	0.2	2.7	2.4	1.6	0.7	1.7	2.8	4	22.8
 <b>SEX</b>														
Male	13106	36.7	20.2	1	2.9	0.2	3.2	2.9	1.5	0.6	2.2	2.5	3.5	22.6
Female	14019	38.6	19.5	0.7	2.7	0.2	2.3	1.8	1.8	0.7	1.1	3.1	4.4	23
 <b>AGE</b>														
15 - 24	3793	26	29.7	0.6	4	0.2	3.9	3.7	2	0.9	1.9	4	2	21.1
25 - 39	6339	35.6	19.5	0.7	3.2	0.3	3.2	2.3	1.5	0.8	2.6	2.7	3.4	24.1
40 - 54	7229	37.9	20.3	0.9	3.2	0.2	2.4	2.3	1.7	0.4	1.6	2.8	3.1	23.1
55 +	9394	43.4	15.8	1.1	1.9	0.1	2.1	1.9	1.5	0.6	1	2.4	5.9	22.3
 <b>EDUCATION (end of)</b>														
Until 15 years of age	3672	51.2	9.6	0.3	1.3	0	1.4	0.6	1.4	0.3	0.9	1.5	8.6	22.9
16 - 20	11931	38.1	18.8	0.7	3	0.2	2.1	2.2	1.6	0.5	1.6	2.5	4.1	24.7
20 +	8210	34.4	23.2	1.4	3.1	0.3	3.5	3.1	2	0.9	2	3.4	2.2	20.6
Still in education	2683	27.2	30.3	0.7	3.7	0.3	4.9	3.3	1.2	1.3	1.8	4.4	1.5	19.4
 <b>URBANISATION</b>														
Metropolitan	5124	35.9	20.9	0.9	3	0.3	3.6	3.3	2	0.8	1.6	2.6	2.7	22.6
Urban	11567	39.9	19	0.8	2.9	0.2	2.7	2.5	1.6	0.6	1.6	3	3.6	21.7
Rural	10301	36.1	20.5	0.9	2.7	0.1	2.2	1.6	1.4	0.8	1.8	2.7	5.1	24
 <b>OCCUPATION</b>														
Self-employed	2571	35.4	20.7	1.4	2.8	0.2	4.4	3.2	1.8	1	2.2	1.9	3.6	21.3
Employee	9392	34.6	23.3	1	3.7	0.2	2.9	2.6	1.7	0.8	2.3	3.1	1.8	21.9
Manual worker	2206	40	15.4	0.2	2.6	0.3	1.5	1.8	2	0.3	2.1	3.2	4.9	25.7
Not working	12811	40	18	0.8	2.2	0.2	2.4	2.1	1.5	0.6	1.1	2.7	5.6	23

## II. Survey details

This general population survey “*Survey on the Attitudes of Europeans towards Tourism, Wave 3*” (No 328) was conducted for the European Commission, Enterprise and Industry Directorate General – Directorate F- Tourism, CSR, Consumer Goods and International Regulatory Agreements.

Telephone interviews were conducted in each country, with the exception of the Bulgaria, the Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania, Slovakia and the former Yugoslav Republic of Macedonia where both telephone and face-to-face interviews were conducted (70% webCATI and 30% F2F interviews). Note: Flash Eurobarometer surveys systematically include mobile phones in samples in Austria, Finland, Italy, Portugal and Spain.

Interviews were conducted in each country between the 24/02/2011 and the 28/02/2011 by the following institutes:

Belgium	BE	Gallup Europe	(Interviews: 24/02/2011 - 28/02/2011)
Czech Republic	CZ	Focus Agency	(Interviews: 24/02/2011 - 28/02/2011)
Denmark	DK	Norstat Danmark	(Interviews: 24/02/2011 - 28/02/2011)
Germany	DE	IFAK	(Interviews: 24/02/2011 - 28/02/2011)
Estonia	EE	Saar Poll	(Interviews: 24/02/2011 - 28/02/2011)
Greece	EL	Metroanalysis	(Interviews: 24/02/2011 - 28/02/2011)
Spain	ES	Gallup Spain	(Interviews: 24/02/2011 - 28/02/2011)
France	FR	Efficiencie3	(Interviews: 24/02/2011 - 28/02/2011)
Ireland	IE	Gallup UK	(Interviews: 24/02/2011 - 28/02/2011)
Italy	IT	Demoskopoea	(Interviews: 24/02/2011 - 28/02/2011)
Cyprus	CY	CYMAR	(Interviews: 24/02/2011 - 28/02/2011)
Latvia	LV	Latvian Facts	(Interviews: 24/02/2011 - 28/02/2011)
Lithuania	LT	Baltic Survey	(Interviews: 24/02/2011 - 28/02/2011)
Luxembourg	LU	Gallup Europe	(Interviews: 24/02/2011 - 28/02/2011)
Hungary	HU	Gallup Hungary	(Interviews: 24/02/2011 - 28/02/2011)
Malta	MT	MISCO	(Interviews: 24/02/2011 - 28/02/2011)
Netherlands	NL	MSR	(Interviews: 24/02/2011 - 28/02/2011)
Austria	AT	Spectra	(Interviews: 24/02/2011 - 28/02/2011)
Poland	PL	Gallup Poland	(Interviews: 24/02/2011 - 28/02/2011)
Portugal	PT	Consulmark	(Interviews: 24/02/2011 - 28/02/2011)
Slovenia	SI	Cati d.o.o	(Interviews: 24/02/2011 - 28/02/2011)
Slovakia	SK	Focus Agency	(Interviews: 24/02/2011 - 28/02/2011)
Finland	FI	Norstat Finland Oy	(Interviews: 24/02/2011 - 28/02/2011)
Sweden	SE	Norstat Sweden	(Interviews: 24/02/2011 - 28/02/2011)
United Kingdom	UK	Gallup UK	(Interviews: 24/02/2011 - 28/02/2011)
Bulgaria	BG	Vitosha	(Interviews: 24/02/2011 - 28/02/2011)
Romania	RO	Gallup Romania	(Interviews: 24/02/2011 - 28/02/2011)
Croatia	HR	Gallup Croatia	(Interviews: 24/02/2011 - 28/02/2011)
Norway	NO	Fieldwork Scandinavia	(Interviews: 24/02/2011 - 28/02/2011)
Iceland	IS	Capacent Gallup	(Interviews: 24/02/2011 - 28/02/2011)
Turkey	TR	Konsensus	(Interviews: 24/02/2011 - 28/02/2011)
The former Yugoslav Republic of Macedonia	MK	Ipsos Strategic Puls	(Interviews: 24/02/2011 - 28/02/2011)

## Representativeness of the results

Each national sample is representative of the population aged 15 years and above.

## Sample sizes

In most countries, the target sample size was 1000 respondents, but in Germany the sample size was 2000 interviews, 1500 interviews in Spain, France, Italy, Poland, United Kingdom, and 500 interviews in Estonia, Cyprus, Latvia, Lithuania, Luxembourg, Malta, Slovenia, Croatia, Norway, Iceland, the former Yugoslav Republic of Macedonia. The table below shows the achieved sample size by country. For EU countries, a weighting factor was applied to the national results in order to compute a marginal total where each country contributes to the EU-wide results in proportion to its population.

The table below presents, for each of the countries:

- (1) the number of interviews actually carried out
- (2) the population-weighted total number of interviews

	Total Interviews			
	Conducted	% of Total	EU27 weighted	% of Total (weighted)
<b>Total</b>	<b>30187</b>	<b>100</b>	<b>27125</b>	<b>100</b>
BE	1002	3.3	572	2.1
BG	1000	3.3	432	1.6
CZ	1000	3.3	573	2.1
DK	1005	3.3	288	1.1
DE	2009	6.7	4611	17.0
EE	516	1.7	74	0.3
EL	1000	3.3	623	2.3
ES	1505	5.0	2473	9.1
FR	1506	5.0	3359	12.4
IE	1000	3.3	224	0.8
IT	1510	5.0	3306	12.2
CY	503	1.7	42	0.2
LV	505	1.7	128	0.5
LT	502	1.7	185	0.7
LU	501	1.7	25	0.1
HU	1006	3.3	555	2.0
MT	500	1.7	22	0.1
NL	1000	3.3	872	3.2
AT	1001	3.3	456	1.7
PL	1507	5.0	2089	7.7
PT	1007	3.3	583	2.1
RO	1013	3.4	1187	4.4
SI	503	1.7	113	0.4
SK	1021	3.4	294	1.1
FI	1000	3.3	285	1.0
SE	1003	3.3	492	1.8
UK	1500	5.0	3262	12.0
HR	505	1.7		
NO	500	1.7		
IS	500	1.7		
TR	1001	3.3		
MK	556	1.8		

## Questionnaires

1. The questionnaire prepared for this survey is reproduced at the end of this results volume, in English.
2. The institutes listed above translated the questionnaire in their respective national language(s).
3. One copy of each national questionnaire is annexed to the results (volume tables).

## Tables of results

### VOLUME A: COUNTRY BY COUNTRY

The VOLUME A tables present the European results country by country.

### VOLUME B: RESPONDENTS' DEMOGRAPHICS

The VOLUME B tables present the European results with the following socio-demographic characteristics of respondents as breakdowns:

Volume B:

Sex (*Male, Female*)

Age (*15-24, 25-39, 40-54, 55 +*)

Subjective urbanisation (*Metropolitan zone, Other town/urban centre, Rural zone*)

Occupation (*Self-employed, Employee, Manual worker, Not working*)

Education (*-15, 16-20, 21+, Still in full time education*)

## Sampling error

Surveys are designed and conducted to provide an estimate of a true value of characteristics of a population at a given time. An estimate of a survey is unlikely to exactly equal the true population quantity of interest for a variety of reasons. One of these reasons is that data in a survey are collected from only some – a sample of – members of the population, this to make data collection cheaper and faster. The “margin of error” is a common summary of sampling error, which quantifies uncertainty about (or confidence in) a survey result.

Usually, one calculates a 95 percent confidence interval of the format: survey estimate +/- margin of error. This interval of values will contain the true population value at least 95% of time.

For example, if it was estimated that 45% of EU citizens are in favour of a single European currency and this estimate is based on a sample of 100 EU citizens, the associated margin of error is about 10 percentage points. The 95 percent confidence interval for support for a European single currency would be (45%-10%) to (45%+10%), suggesting that in the EU the support for a European single currency could range from 35% to 55%. Because of the small sample size of 100 EU citizens, there is considerable uncertainty about whether or not the citizens of the EU support a single currency.

As a general rule, the more interviews conducted (sample size), the smaller the margin of error. Larger samples are more likely to give results closer to the true population quantity and thus have smaller margins of error. For example, a sample of 500 will produce a margin of error of no more than about 4.5 percentage points, and a sample of 1,000 will produce a margin of error of no more than about 3 percentage points.



Margin of error (95% confidence interval)

Survey estimate	Sample size (n)									
	10	50	100	150	200	400	800	1000	2000	4000
5%	13.5%	6.0%	4.3%	3.5%	3.0%	2.1%	1.5%	1.4%	1.0%	0.7%
10%	18.6%	8.3%	5.9%	4.8%	4.2%	2.9%	2.1%	1.9%	1.3%	0.9%
25%	26.8%	12.0%	8.5%	6.9%	6.0%	4.2%	3.0%	2.7%	1.9%	1.3%
50%	31.0%	13.9%	9.8%	8.0%	6.9%	4.9%	3.5%	3.1%	2.2%	1.5%
75%	26.8%	12.0%	8.5%	6.9%	6.0%	4.2%	3.0%	2.7%	1.9%	1.3%
90%	18.6%	8.3%	5.9%	4.8%	4.2%	2.9%	2.1%	1.9%	1.3%	0.9%
95%	13.5%	6.0%	4.3%	3.5%	3.0%	2.1%	1.5%	1.4%	1.0%	0.7%

(The values in the table are the margin of error – at 95% confidence level – for a given survey estimate and sample size)

The examples show that the size of a sample is a crucial factor affecting the margin of error. Nevertheless, once past a certain point – a sample size of 800 or 1,000 – the improvement is small. For example, to reduce the margin of error to 1.5% would require a sample size of 4,000.

More details on calculating the margin of error for differences between surveys can be found in Franklin's 2007 paper: "The Margin of Error for Differences in Polls"

<http://abcnews.go.com/images/PollingUnit/MOEFranklin.pdf>

### III. Questionnaire

**Q1. During 2010, how many times have you travelled for business or private purposes where you were away from home for a minimum of one night?**

Record the actual number: \_\_\_\_\_

[00] – Have not travelled at all → GO TO Q4

[99] – DK/NA

**Q2. And how many of these were short private trips, where you stayed away for less than four nights?**

Record the actual number: \_\_\_\_\_

[00] – None

[99] – DK/NA

**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?**

Record the actual number: \_\_\_\_\_

[00] – None

[99] – DK/NA

**IF Q3=0 OR Q1=0**

**Q4. What was the main reason why you did not go on holiday in 2010?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Personal/private reasons ..... 1
- Financial reasons ..... 2
- Lack of time ..... 3
- Prefer to only make short-stay trips ..... 4
- No motivation to take a holiday in 2009 ..... 5
- Concerns about safety ..... 6
- Prefer to stay at home or with family / friends ..... 7
- Other ..... 8
- [DK/NA] ..... 9

[IF Q3 NOT EQ 0 OTHERWISE GO TO Q8]

**Q5. What was the major motivation for your main holiday trip in 2010?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Sun/beach ..... 1
- Wellness/health treatment ..... 2
- Rest/recreation ..... 3
- City trips ..... 4
- Sports-related ..... 5
- Nature ..... 6
- Culture / religion ..... 7
- Visiting friends / relatives ..... 8
- [DK/NA] ..... 9

**Q6. How did you travel there in 2010? (what was the main method of transport?)**

[READ OUT - ONLY ONE ANSWER POSSIBLE]

- Airplane ..... 1
- Boat ..... 2
- Train ..... 3
- Bus ..... 4
- Car / motorbike ..... 5
- Bicycle (not motorised) ..... 6
- Other ..... 7
- [DK/NA] ..... 9

**Q7. How did you organize your main holiday trip in 2010?**

[READ OUT - ONLY ONE ANSWER POSSIBLE]

- Travel / accommodation organised individually ..... 1
- Travel or accommodation booked through a travel agency ..... 2
- Package tour/All Inclusive holiday booked via the Internet ..... 3
- Package tour /All Inclusive holiday booked through a travel agency ..... 4
- Other ..... 5
- [DK/NA] ..... 9

[ASK ALL]

**Q8. When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Entertainment (movies; theatres) ..... 1
- Restaurants and cafes ..... 2
- Shopping ..... 3
- Beauty/Wellness treatments ..... 4
- Sports and other activities ..... 5
- [None (I would not reduce any)] ..... 6
- [All of these] ..... 7
- [DK/NA] ..... 9

**Q9. What type of holiday destinations do you prefer?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Traditional, well-known destinations ..... 1
- Non-traditional, emerging destinations ..... 2
- [Not important, no preference] ..... 3
- [DK/NA] ..... 9

**Q10. What would be your main expectation from a non-traditional, emerging destination?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Better quality of service ..... 1
- Lower prices ..... 2
- Better value for money ..... 3
- Local culture, lifestyle and traditions ..... 4
- Better environmental quality ..... 5
- [DK/NA] ..... 9

**Q11a. From the following information sources, which one do you consider to be the most important when you make a decision about your travel plans?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Personal experience ..... 1
- Recommendations of friends and colleagues ..... 2
- Guidebooks and magazines (commercial) ..... 3
- Catalogues, brochures (non-commercial) ..... 4
- The Internet ..... 5
- Travel / tourist agencies ..... 6
- Media (newspaper, radio, TV) ..... 7
- [DK/NA] ..... 9

**Q11b. And what is the second most important?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Personal experience ..... 1
- Recommendations of friends and colleagues ..... 2
- Guidebooks and magazines (commercial) ..... 3
- Catalogues, brochures (non-commercial) ..... 4
- The Internet ..... 5
- Travel / tourist agencies ..... 6
- Media (newspaper, radio, TV) ..... 7
- [DK/NA] ..... 9

**Q12. From the following attractions, please choose the one that has the major influence on your choice of destination?**

[READ OUT - ROTATE- ONLY ONE ANSWER POSSIBLE]

- Art ..... 1
- Gastronomy ..... 2
- Entertainment ..... 3
- Cultural heritage ..... 4
- Festivals & other events ..... 5
- The environment ..... 6
- Others ..... 7
- [DK/NA] ..... 9

**Q13. Where do you plan to spend your main holiday in 2011?**

[Precoded, including the at home and within the country]

**D1. Gender** [DO NOT ASK - MARK APPROPRIATE]

- [ 1 ] Male
- [ 2 ] Female

**D2. How old are you?**

- [\_][\_] years old
- [00] [REFUSAL/NO ANSWER]

**D4. As far as your current occupation is concerned, would you say you are self-employed, an employee, a manual worker or would you say that you are without a professional activity? Does it mean that you are a(n)...**

[IF A RESPONSE TO THE MAIN CATEGORY IS GIVEN, READ OUT THE RESPECTIVE SUB-CATEGORIES - ONE ANSWER ONLY]

**- Self-employed**

- i.e. : - farmer, forester, fisherman..... 11
- owner of a shop, craftsman ..... 12
- professional (lawyer, medical practitioner, accountant, architect,...) ..... 13
- manager of a company ..... 14
- other ..... 15

**- Employee**

- i.e. : - professional (employed doctor, lawyer, accountant, architect) ..... 21
- general management, director or top management ..... 22
- middle management ..... 23
- Civil servant ..... 24
- office clerk..... 25
- other employee (salesman, nurse, etc...)..... 26
- other ..... 27

**- Manual worker**

→ i.e.:	- supervisor / foreman (team manager, etc...).....	31
	- Manual worker .....	32
	- unskilled manual worker.....	33
	- other .....	34

**- Without a professional activity**

→ i.e.:	- looking after the home .....	41
	- student (full time).....	42
	- retired .....	43
	- seeking a job.....	44
	- other .....	45
- [Refusal].....		99

**D6. Would you say you live in a ...?**

- metropolitan zone.....	1
- other town/urban centre .....	2
- rural zone .....	3
- [Refusal] .....	9