

Survey on the attitudes of Europeans towards tourism

Analytical report

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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 #258

Survey on the attitudes of Europeans towards tourism

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



Survey co-ordinated by
Directorate General Communication

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THE GALLUP ORGANISATION

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Introduction

This Flash Eurobarometer survey (Flash Eurobarometer 258 on the “*Survey on the attitudes of Europeans towards tourism*” was conducted at the request of Directorate General Enterprise and Industry to collect citizens’ views, details of holidays and travel in 2007 and 2008 and their plans regarding holidays in 2009.

This analytical report includes the average results for the EU and highlights variances in responses based on the interviewees’ country of residence, their socio-demographic background and fundamental attitudes towards holidays and travel. It also examined how EU citizens chose a holiday destination.

A special emphasis was put on the financial aspect of taking a holiday, as this is becoming the prime concern for travellers as well as for the tourism industry in the midst of a serious economic downturn affecting all economies of the EU.

The fieldwork was conducted from 14 to 18 February, 2009. Over 27,000 randomly selected citizens aged 15 and over were interviewed in the 27 EU Member States. The sample size varied within Member States, ranging from 2000 in the largest to about 500 in the smallest countries (please see the Survey Details section in the Annex where the actual sample size for the 27 countries are indicated). Interviews were predominantly carried out by telephone.

Due to the low fixed-line telephone coverage in Bulgaria, the Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania and Slovakia, face-to-face (F2F) interviews were also conducted (700 telephone and 300 F2F interviews) in those countries. 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 (section ‘Survey details’).

Main findings

Travel trends

- Overall, in 2008, two-thirds of EU citizens (67%) made a private trip where they spent at least one night away from home; 58% took a vacation, defined by a stay somewhere away from home for at least four consecutive nights for private reasons.
- In the more affluent parts of Europe (e.g. most of the pre-2004 countries), it is normal for more than three-quarters of citizens to take at least one trip per annum; in the rest of the Union (primarily the post-2004 Member States, but including Portugal) – about half of the citizens travel each year.
- The most popular holiday destinations of the EU holiday makers in 2008 were Spain, Italy, France and Greece – and these countries dominate the current plans made for 2009.
- As to how many people will actually take a vacation in 2009, the picture is not clear. At the time of the survey (February 2009), 28% of EU citizens were undecided about the type of vacation they want to take. Many of those yet to make a decision are probably hesitating as to whether or not they will take a vacation, rather than making a choice about the type of holiday. Unfortunately no earlier data exists that could support any projections about the likely percentage of the undecided groups who will eventually not take a vacation away from home. (For the same reason it is also unknown whether or not the current number of undecided citizens is above the ‘normal’ proportion characteristic to this period of the year.)
- At the time of the survey, the proportion of those who are certain that they will *not* travel in 2009 (19%) was below the proportion of non-travellers in 2008 (32%). It remains to be seen what proportion of the currently undecided ones (28%) will eventually take a holiday.
- Four in ten Europeans travelled in 2008 and have holiday plans for 2009. However, 17% travelled last year but are still hesitating about a holiday in 2009 – their eventual decision will be critical for the European tourism industry. This segment amounted to a relatively high percentage (of all residents) in some of the largest Member States in terms of tourist “output”. The survey showed that 23% of Dutch and Italian, 21% of Spanish, 17% of French and 16% of German and British respondents belong to this “vulnerable” tourist category in terms of prospects.
- The focus of tourism seems to be shifting in a more domestic direction: in 2008, 43% of respondents took a holiday in their own country, this compares to 48% who will take a holiday in their resident country in 2009 (of those who already know their 2009 destination). Significantly fewer travellers have current plans to travel to other EU countries in 2009 compared to 2008 (24% and 31%, respectively). Non-EU destinations, however, gained some popularity, probably due to the increasingly favourable exchange rates for euro area travellers to many destinations (among those who plan a holiday and already know a destination 28% plan to visit a non-EU country, which is slightly more than the 26% in 2008).

Travel budgets

- Most citizens who did not take a holiday in 2008 said this was due a lack of the necessary funds.
- About 4 in 10 Europeans who have plans to take a holiday in 2009 felt they have sufficient funds to do this (41%). Almost as many (40%) said that they would need to make extra savings. About 1 in 10 (11%), however, said they had serious financial problems that could impact their holiday plans. There were only six Member States where a clear majority who planned to take a holiday were confident they could afford to take a holiday in 2009: Finland (69%), the Netherlands (66%), Sweden, Luxembourg, Denmark (all 62%) and Austria (60%).
- A few patterns in the data might show where the economic downturn might have the most affect on the tourist industry. Respondents who have planned more substantial holidays (more than two weeks or a combination of longer/shorter trips) are more confident about funding. Over half (54%) felt there would be no financial problems vs. 45% of those planning shorter trips. Those who preferred alternative locations were slightly more optimistic compared to those who like to travel to classic destinations (44% vs. 41%).
- European travellers would first give up winter holidays (42%) if their finances were not sufficient to meet their total holiday plans. A quarter (23%) said they would save money by travelling during the low season (currently half of the EU citizens' holidays take place in July and August), and 20% said they would consider staying closer to home (this tendency has been seen in the 2009 plans, with a markedly higher share of domestic vacation plans). Last-minute booking could also gain more popularity: 12% would consider this strategy to cut costs. Finally, 15% said they would (be able to) save on accommodation and 8% on the type of transport.
- Secondary industries can also suffer from a decreasing travel budget, large proportion of Europeans indicated that they would cut cost on shopping and wellness services if they had less money to spend.

Holiday focus, attractions, destinations

- Europeans were most likely to travel for recreation (47% indicated that this was the main objective of their 2008 holiday). Another 20% were specifically motivated by the possibility of a beach holiday and a further 17% focused primarily on cross-cultural experiences (e.g. visiting cities, cultural events etc.).
- On average, European tourists prefer value for money (33%) over “low price” (16%). Safety and security at the destination was important for 13% of respondents and 12% indicated that they usually focus on quality – not necessarily in conjunction with the associated costs.
- Cost in itself is an overriding concern in countries where the survey found - proportionally - the least people taking a holiday. This shows that a lack of disposable income on the part of a large section of the population is a barrier to travel. Countries, where “price” is clearly the most important factor are Hungary, Poland, Romania, Latvia and Lithuania.
- Most Europeans preferred to spend their holidays in conventional tourist destinations (54%). About half as many, 28%, would rather go “off the beaten track”. Those attracted to non-conventional destinations were most likely to indicate that they appreciate the *couleur locale* (48%) at these destinations.

- Non-conventional, emerging destinations might want to anticipate relatively more guest-nights than the overall 28% popularity might suggest. Those who favour such locations were more likely to indicate that they will travel in 2009 (19% of the former said they do *not* plan to travel this year compared to 27% of those who preferred conventional tourist destinations). Additionally, they were also more likely to say they are planning more substantial holidays.
- When choosing holiday destinations, most Europeans named the actual environment of the location (e.g. its overall attractiveness) as being the major consideration (31%). Cultural heritage (24%) and entertainment possibilities (15%) were the second and third most widespread criterion for choosing a destination.

Arranging a holiday

- A majority (56%) of holidaymakers across the EU said they had organised their main holiday themselves. Sixteen percent had booked travel tickets or accommodation through a travel agency and one-fifth had opted for a package tour, either booked through a travel agency (9%) or via an online travel provider (10%).
- Holidaymakers who spent their main holiday of 2008 in their country of residence typically booked their travel and accommodation individually (72% compared to 47% who had travelled to another EU country and 42% who travelled outside the EU).
- Europeans generally preferred non-institutional sources of information about vacation possibilities: the three most preferred sources were – in part or totally – independent of the tourist industry. Most respondents said they primarily relied on word-of-mouth information when deciding about holiday destinations: 57% utilise social networks to obtain information about travel destinations. Almost a third (31%) of respondents indicated that they relied on personal experience when choosing a destination.
- In those countries where respondents relied most often to the personal experiences of friends and family when choosing a holiday destination, holiday-makers were least inclined to refer to travel agents and vice versa.
- The Internet has clearly become the most influential “non-personal” information source for holiday planning: 38% use this medium that provides commercial information as well as peer reviews and recommendations. Those respondents who prefer going “off the beaten track” rely heavily on the Internet: almost half of those interviewees indicated that they seek information online.
- Mass media channels like newspapers, TV and the radio were least likely to make any of the two most important sources where Europeans obtain inputs for their holiday decisions.

1. Travel profiles of EU citizens in 2008

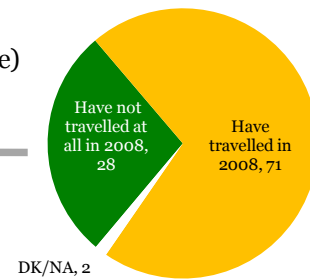
1.1 Proportion of EU citizens who travelled in 2008

Seven out of 10 (71%) EU citizens said they had travelled at least once in 2008, while 28% had not travelled during that period. Note: travelling was defined as spending at least one night away from home, for private or business purposes.

Proportion of EU citizens who have travelled in 2008 (minimum one night away from home)

Among those who did not travel in 2008, 32% made a trip in 2007

Q3A. Did you make a trip in 2007 (min. 1 night)?
%, Base: who did not travel at all in 2008, EU27



N= 27127

Q1. During 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

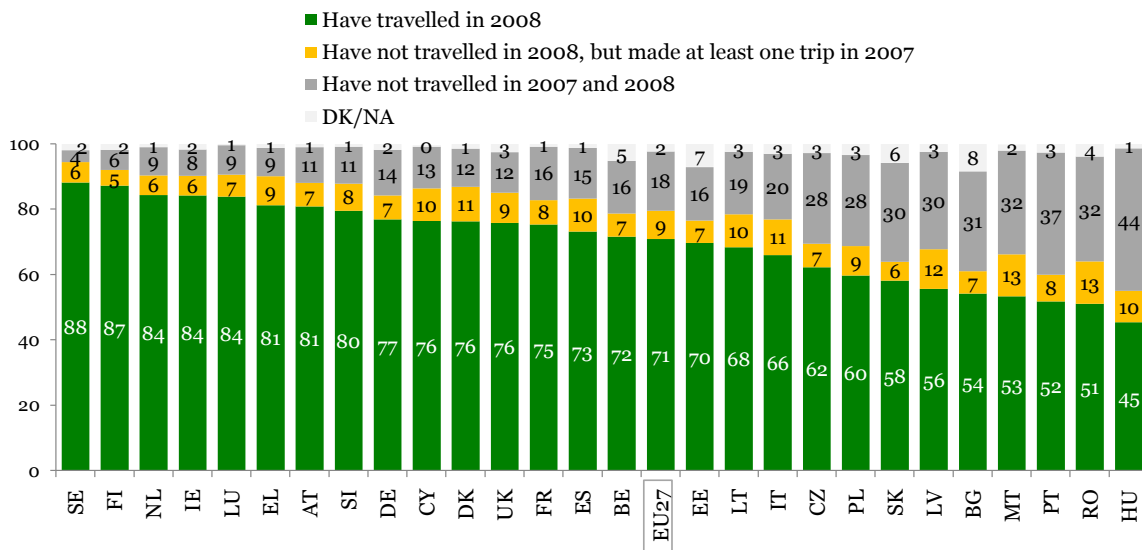
Of respondents who had not travelled in 2008, 65% had not taken a trip in the previous year.

Looking at all EU citizens (as shown in the chart below), this means that 71% had travelled at least once in 2008, 9% had not done so in 2008 but had made at least one trip in 2007, and 19% had not travelled at all (i.e. in either 2007 or 2008).

Almost nine out of 10 Swedes and Finns (88% and 87%, respectively), and 84% of Dutch, Irish and Luxembourgers had travelled at least once during 2008. In Hungary, on the other hand, only 45% of citizens had made a trip during that period. Other countries at the lower end of the distribution were Romania (51%), Portugal (52%), Malta (53%), Bulgaria (54%), Latvia (56%) and Slovakia (58%).

Hungary and Portugal (44% and 37%, respectively) had the highest proportion of interviewees who had not made any trips in 2007 or 2008. In Sweden and Finland, the share of non-travellers was 6% or less. The proportion of respondents who had not travelled in 2008, but who had made at least one trip in 2007 ranged from 5% in Finland to 13% in Romania and Malta.

Proportion of EU citizens who have travelled in 2008 (minimum one night away from home)



Q1. During 2008, how many times have you travelled for business or private purposes where you were away from home for a minimum of one night? Q3A. Did you make a trip in 2007 where you were away from home for a minimum of one night?
%, Base: all respondents, EU27

1.2 Short private and holiday trips in 2008

The previous section looked at the proportion of EU citizens who had travelled for private or business purposes in 2008 and, to an extent, in 2007. In the current section, *we focus solely on travel for private or holiday purposes* – distinguishing between short private trips and holiday trips as defined below.

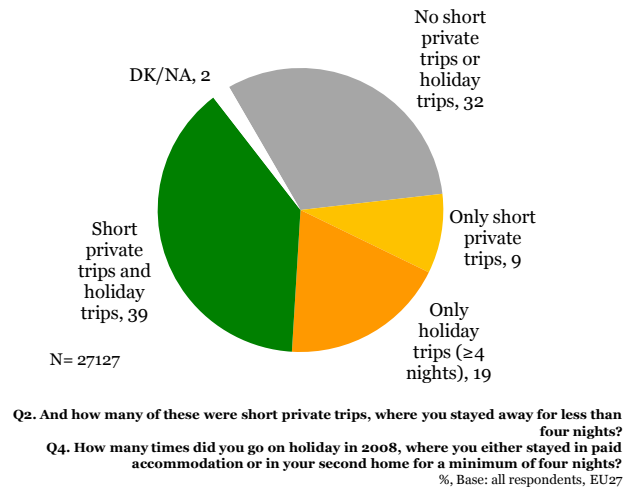
- *Short private trips*: spending between one and three nights away from home for private reasons (including short holidays)
- *Holiday trips*: spending four nights or more away from home – on holiday - while staying in paid accommodation or in a second home.

Two-thirds of EU citizens said they had travelled – for private reasons – at least once in 2008: 39% had made at least one holiday trip and at least one short private trip, 19% had made at least one holiday trip but no short private trips, and 9% had made at least one short private trip but no holiday trips.

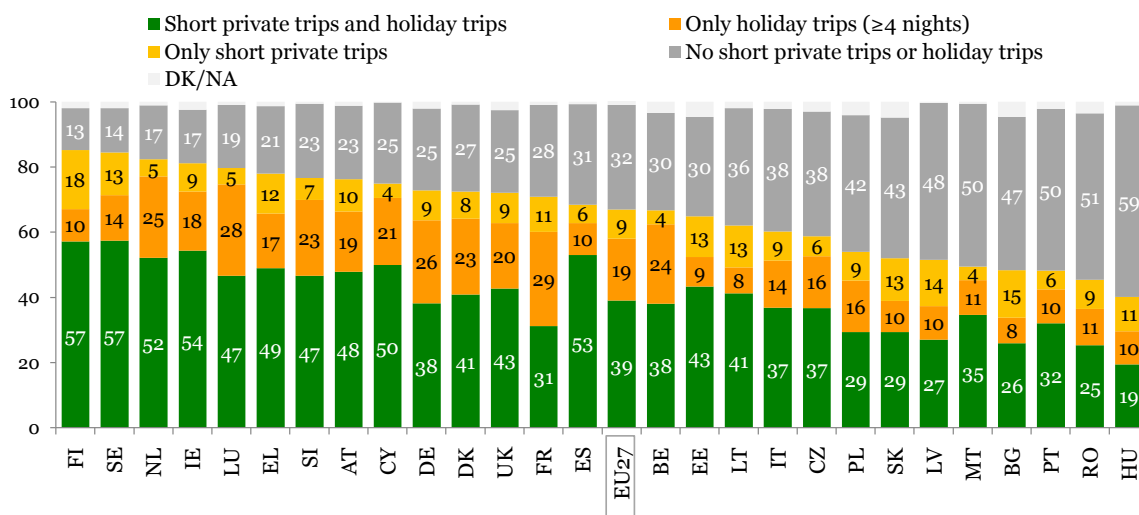
The individual country results showed a similar ranking of countries as we saw for the results of travel in general (for business and private purposes – section 1.1). Half or more interviewees in Hungary (59%), Romania (51%), Portugal and Malta (both 50%) had not made any holiday or short private trips in 2008. In Finland, Sweden, the Netherlands, Ireland and Luxembourg,

on the other hand, less than a fifth of respondents had not travelled for private reasons in 2008 (between 13% and 19%). Furthermore, a majority of interviewees in the latter Member States – and in Spain – had made at least one holiday trip and at least one short private trip: 57% in Finland and Sweden, 54% in Ireland, 53% in Spain and 52% in the Netherlands.

Short private trips and/or holiday trips in 2008



Short private trips and/or holiday trips in 2008



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

In slightly more than half of the EU Member States, the proportion of respondents who took a holiday during 2008 was greater than the proportion making one short private trip. For example, while 7 out of 10 Slovenes said they had taken at least one holiday in 2008, only slightly more than half (53%) had

made at least one short private trip. Short holiday trips were as frequent as, or more frequent than, longer ones in Finland and Sweden, and in some eastern European countries: Bulgaria, Lithuania, Latvia, Estonia, Slovakia, Hungary, Romania and Hungary. For example, 49% of Lithuanians went on at least one holiday trip in 2008 compared to 54% who made at least one short private trip.

The likelihood to have travelled for private reasons during 2008 decreased with the respondents' age and increased with educational level and occupational status. For example, while 52% of the least-educated respondents had not travelled for private reasons, this proportion decreased to 18% of the most-educated respondents. Those living in rural areas were also less likely than city dwellers to have travelled for private reasons in 2008. Furthermore, older respondents, those with lower levels of education, rural residents, manual workers and those not working were – relatively speaking – more likely to have only made short private trips or holiday trips and they were less likely to have made both types of private journey.

Short private trips and/or holiday trips in 2008

(row %)	Short private trips and/or holiday trips	Only holiday trips	Only short private trips	No short private trips or holiday trips	DK/NA
EU27	39	19	9	32	2
Male	40	18	10	30	2
Female	37	20	9	33	2
AGE: 15-24	43	19	10	25	3
AGE: 25-39	44	18	10	27	2
AGE: 40-54	40	18	9	31	2
AGE: 55+	32	19	8	38	2
Self-employed	48	17	10	23	2
Employees	49	20	9	20	2
Manual workers	28	17	9	44	2
Not working	32	18	9	39	2
Metropolitan zone	45	20	8	26	2
Other town/urban/centre	40	19	9	30	2
Rural zone	35	18	10	35	2
EDUCATION: <15 years of age	23	16	8	52	2
EDUCATION: 16-20	36	19	9	34	2
EDUCATION: 20+	51	20	9	18	2
EDUCATION: Still in education	45	20	10	22	2

It should be noted that some of the differences across socio-demographic groups observed at the EU level were much more pronounced within the individual country results. For example, while 45% of Hungarians living in metropolitan areas had not gone on holiday in 2008, this proportion increased to 70% for those living in rural areas. In Austria, on the other hand, the respondent's location of residence had much less impact: one-fifth of Austrian city dwellers had not made any holiday trips or short private trips during 2008, compared to a quarter of rural residents.

When comparing responses for the total number of trips taken (including business, see section 1.1 – Q1) and the number of trips made for private reasons, it appears that only a minority (4%) of EU citizens had only travelled on business. One-sixth of EU citizens had travelled for both business and private purposes, while 50% had only travelled for private reasons.

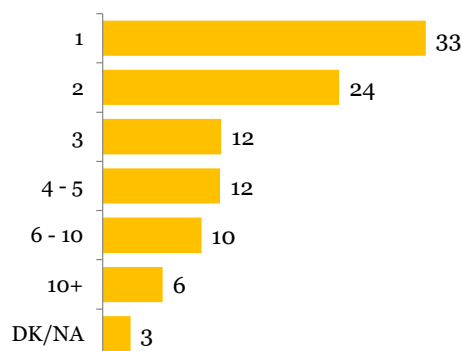
1.3 Travel frequency of short private and holiday trips

Focusing solely on respondents who had made **short private trips in 2008**, it appears that a majority had made one or two trips (33% and 24%, respectively). Only 16% had made more than five such trips.

In almost all Member States, half or more of these respondents had made one or two short private trips (ranging from 51% in Ireland to 82% in Malta). In Malta, Cyprus and Portugal, a majority had only made one short private trip (55%, 53% and 52%, respectively).

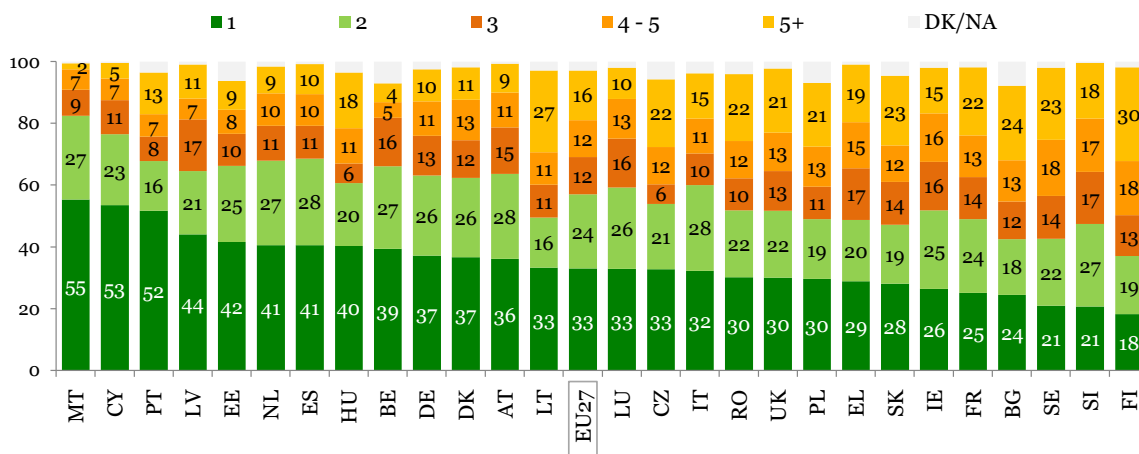
More than four out of 10 Finnish and Swedish respondents – who had made short private trips in 2008 – went on at least four trips (48% and 41%, respectively). In Malta, Cyprus and Belgium, on the other hand, only approximately 1 in 10 respondents had made at least four short private trips in 2008 (between 9% and 12%).

Number of short private trips in 2008
(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 in 2008, EU27

Number of short private trips in 2008

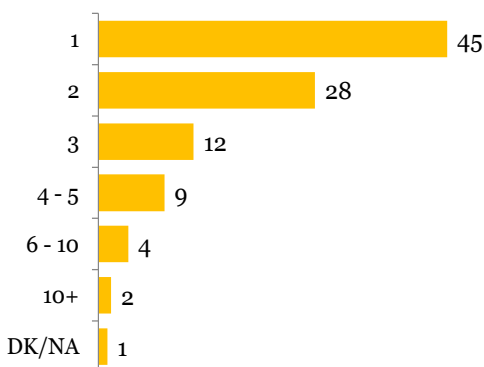


Q2. And how many of these were short private trips, where you stayed away for less than four nights?
%, Base: who made at least one short private trip in 2008, by country

However, if we look at respondents who had been **on holiday during 2008**, it appears that almost three-quarters had made one or two holiday trips (45% and 28%, respectively). Only 6% had taken more than five holidays during 2008. The travel frequency for short private trips was higher than for holidays (i.e. respondents were more likely to have made more than one short private trips than to have taken more than one holiday).

In all Member States, a majority of respondents – who had been on holiday during 2008 – had made one or two holiday trips (between 59% in Finland and 86% in Slovakia).

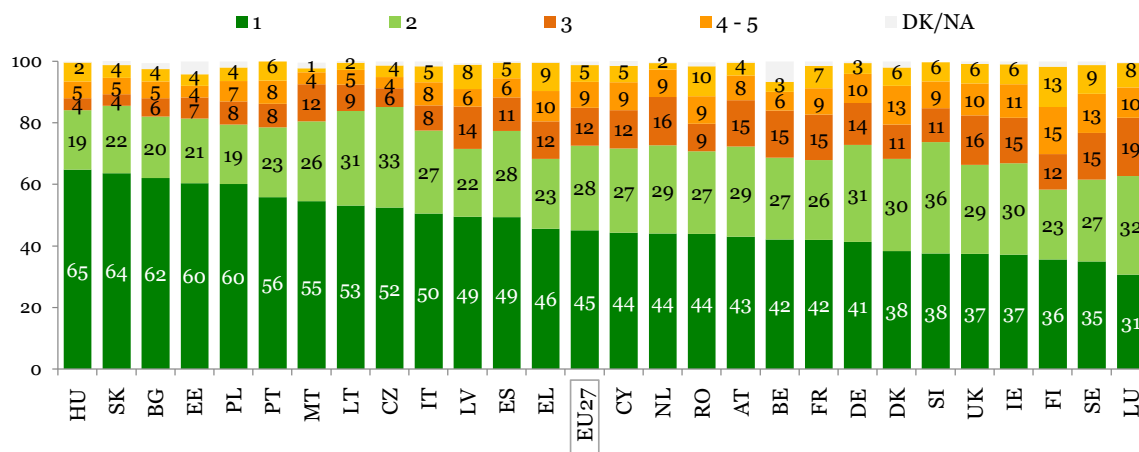
Number of holiday trips in 2008
(minimum four nights away from home)



Q4. How many times did you go on holiday in 2008?
%, Base: who made at least one holiday trip in 2008, EU27

half of the respondents had been on holiday only once (ranging from 50% in Italy to 65% in Hungary). Interviewees in Finland and Sweden were – once again – the most likely to have taken four or more holiday trips (28% and 22%, respectively). In Malta and Belgium, and six more Member States, less than one-tenth of respondents had been on four or more holiday trips.

Number of holiday trips in 2008



Q4. How many times did you go on holiday in 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 in 2008, by country

Socio-demographic considerations

It was noted before that older respondents, those with lower levels of education, rural residents, manual workers and those not working were less likely to have made both type of private trips. The socio-demographic analysis of the number of short private and holiday trips in 2008 showed that respondents in some groups were also less likely to have made more than one or two such trips: respondents with lower levels of education, rural residents and manual workers.

For example, while almost half (46%) of the most-educated respondents – who had made short private trips in 2008 – had made at least three such trips during 2008, only 30% of the least-educated respondents had done so. Amongst the latter, 42% had made one short trip and 24% had made two such trips (compared to 27% and 25%, respectively of the former).

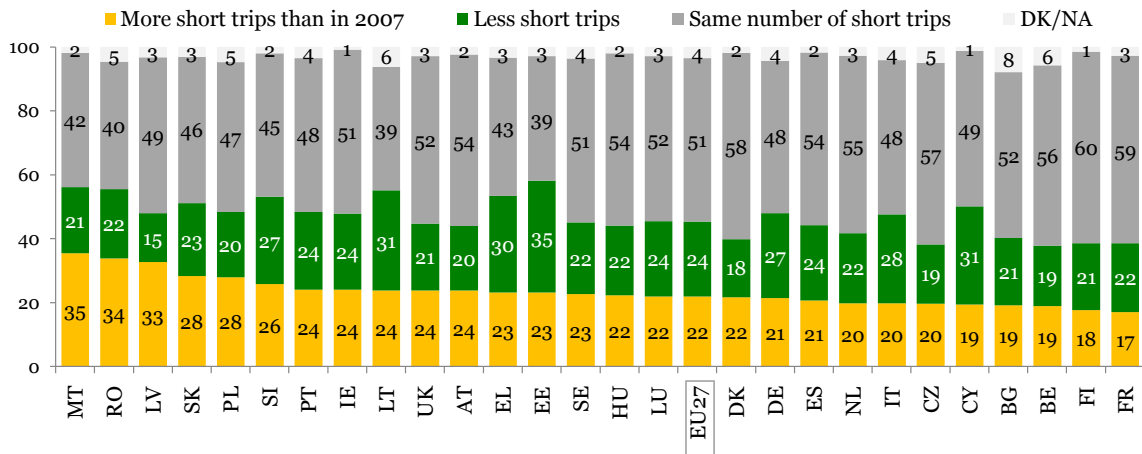
The effect of age on the travel frequency was dependent on the type of travel. The frequency of short private trips was highest among the 25-39 year-olds (31% made at least four short private trips in 2008 vs. slightly more than a quarter of those in the other age groups), while the travel frequency for holiday trips was highest among the over 54 year-olds (19% made at least four holiday trips in 2008 vs. slightly more than one-tenth of respondents in the other age groups). See Annex Tables 2b, 2c, 5b and 5c for full details.

1.4 Evolution of short trips (business or private)

Half (51%) of respondents – who had travelled in 2008 – had made as many short trips (for business or private reasons) in 2008 as in 2007. An almost equal number said they had made more (22%) or less (24%) short trips, in 2008 compared to 2007. From this fact alone, it appears that there was no substantial change at an EU level in the overall numbers of short trips.

The proportion of travellers who had made the same number of short trips in 2008 and 2007 ranged from 39% in Lithuania and Estonia to 60% in Finland. Maltese, Romanian and Latvian citizens were the most likely to have made more short trips in 2008 than in 2007 (35%, 34% and 33%, respectively), while Estonians were the most likely to have made less short trips (35%).

Evolution of short trips from 2007 to 2008
(from one to three nights away from home)



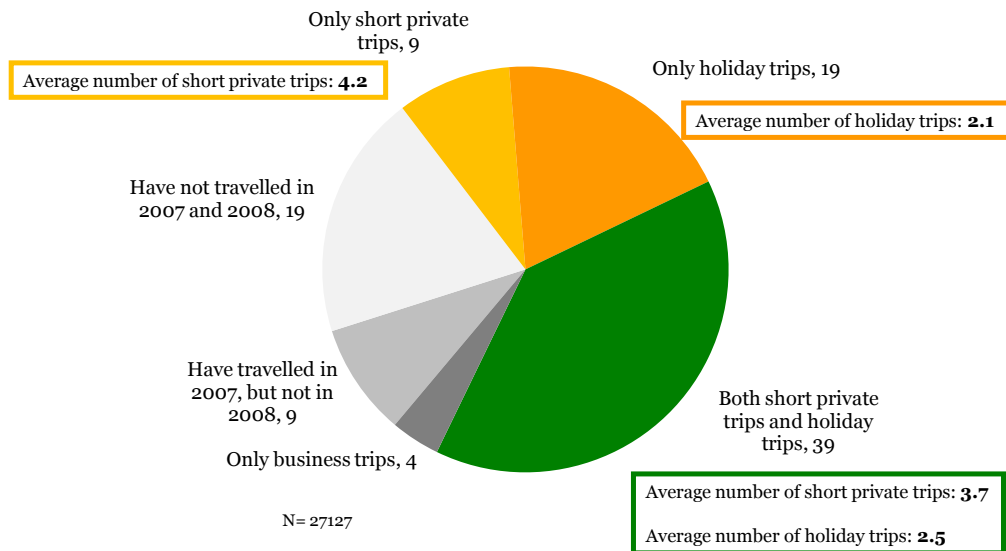
Q3. Was this more, less or the same number of short trips that you took in 2007?
%, Base: who travelled for business or private purposes during 2008, by country

The socio-demographic analysis in terms of the evolution of short trips from 2007 to 2008 did not show many differences across socio-demographic groups. The largest differences were found when comparing respondents in the different age groups. While more than half (59%) of the over 54 year-olds – who had travelled in 2008 – had made the same number of short trips (for business or private reasons) in 2008 as in 2007, this proportion decreased to 38% for the youngest respondents (15-24 year-olds). The numbers of short trips varied more from 2007 to 2008 for those in the latter: 28% said they made less short trips (vs. 21% of the over 54s) and 32% said they made less such trips (vs. 16% of the over 54s). See annex table 3b for full details.

1.5 Holiday travel (including short private trips) in 2008 – an overview

The following chart presents an overview of holiday travel (including short private trips) in 2008 – in terms of the various travel profiles and the average number of trips taken.

An overview of travel in 2008



Q1. During 2008, how many times have you travelled for business or private purposes where you were away from home for a minimum of one night?
Q2. And how many of these were short private trips, where you stayed away for less than four nights?

Q3A. Did you make a trip in 2007 (min. 1 night)?
Q4. How many times did you go on holiday in 2008, where you either stayed in paid accommodation or in your second home for a minimum of four nights?

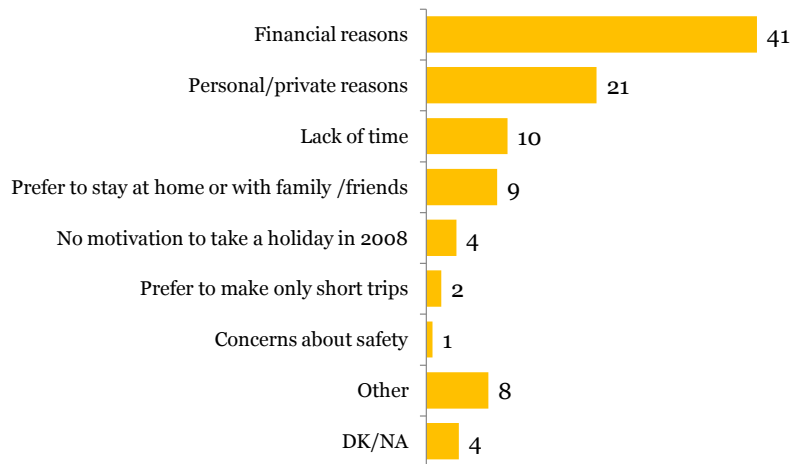
%, Base: all respondents, EU27
Note: 2.4% of cases were not classified, they gave at least one "don't know" responses to question 1, 2 and 4. Values for Q1, Q2 or Q4 were cut at 30.

2. Reasons for not taking a holiday in 2008

2.1 Main reasons for not having gone on holiday in 2008

Four out of 10 respondents (41%) – who did not go on holiday in 2008 – said this was because of financial reasons. All other explanations for not going on holiday (as listed in the survey) were selected by considerably fewer respondents: 21% stated personal or private reasons, 10% said they had had no time and 9% had preferred to stay at home or with family and friends. A minority of respondents said they had not been motivated to take a holiday in 2008 (4%) or preferred to make only short trips (2%). Virtually no respondents (1%) said they had not gone on holiday because of safety/security considerations.

The main reason for not having gone on holiday in 2008

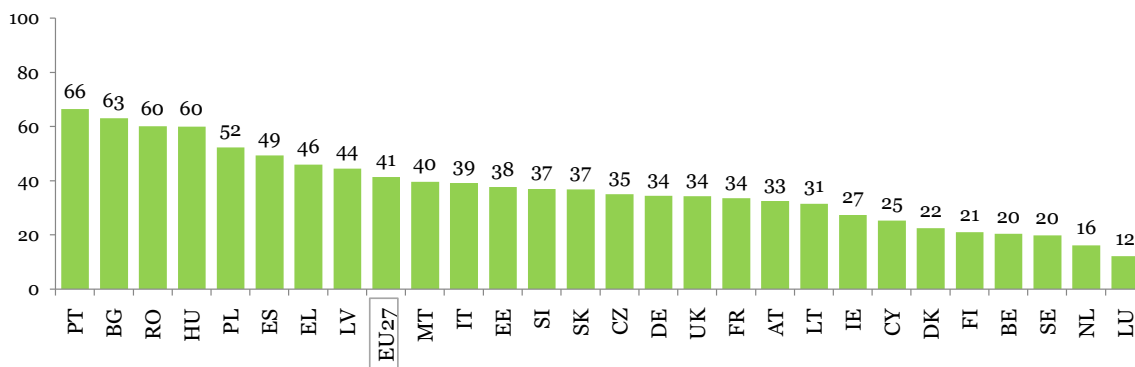


Q5. What was the main reason why you did not go on holiday in 2008?

%, Base: respondents who did not make a holiday trip in 2008 (and those who had not travelled at all in 2008), EU27

Financial reasons for not going on holiday in 2008 were most often cited by respondents in Portugal (66%), Bulgaria (63%), Romania and Hungary (both 60%). In sharp contrast, less than one-fifth of respondents in Luxembourg (12%) and the Netherlands (16%) said they were financially constrained.

Financial reasons for not having gone on holiday in 2008



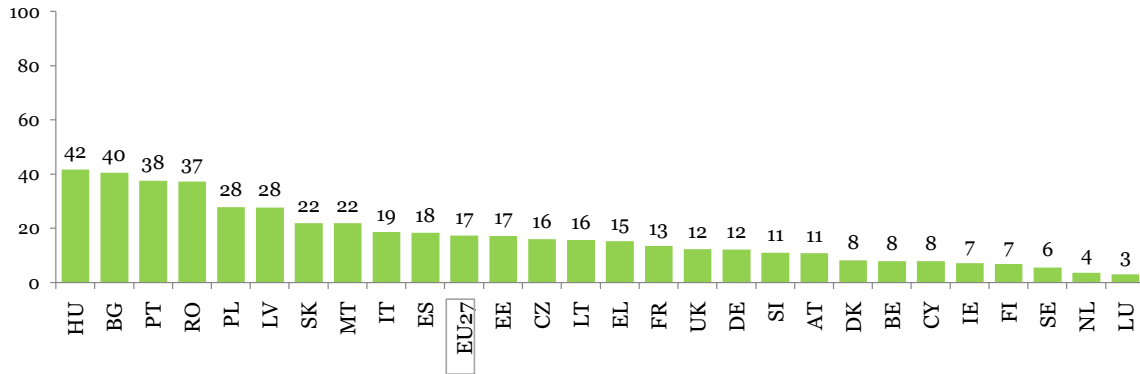
Q5. What was the main reason why you did not go on holiday in 2008?

%, Base: respondents who did not make a holiday trip in 2008 (and those who had not travelled at all in 2008), by country

When looking at the results for the total EU population (i.e. all respondents and not just those who did not go on holiday in 2008 – as shown in the charts above), it was noted that one-sixth (17%) of all EU citizens had not gone on holiday in 2008 because of financial considerations. The proportion ranged from less than 1 in 20 citizens in Luxembourg and the Netherlands to approximately four out of 10 in Romania (37%), Portugal (38%), Bulgaria (40%) and Hungary (42%).

Financial reasons for not having gone on holiday in 2008

Base: all respondents

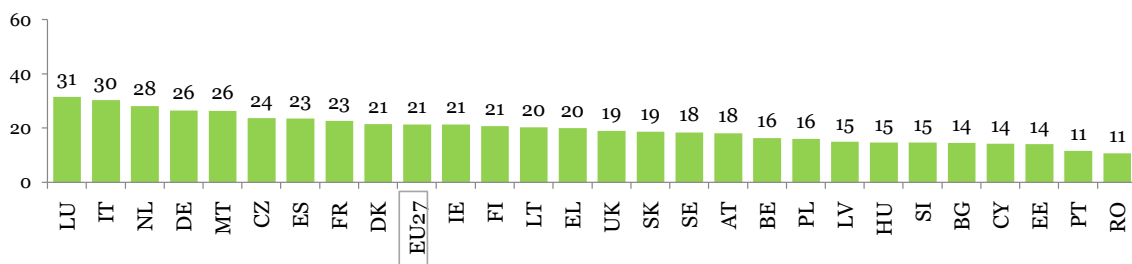


Q5. What was the main reason why you did not go on holiday in 2008?

%, Base: all respondents, by country

While Luxembourgish and Dutch citizens were the least likely to have had their holiday plans disrupted for financial reasons, they were among the most likely to say that they had not gone on holiday in 2008 for **personal reasons** (31% in Luxembourg and 28% in the Netherlands). Italians were as likely to cite such reasons (30%), while Portuguese and Romanian citizens had the least tendency to do so (both 11%).

Personal or private reasons for not having gone on holiday in 2008

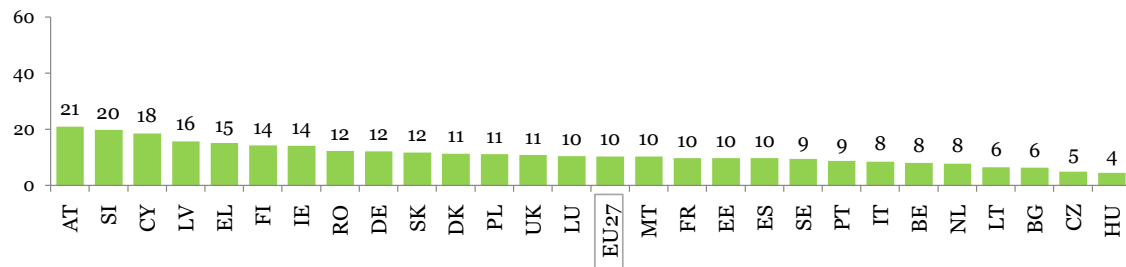


Q5. What was the main reason why you did not go on holiday in 2008?

%, Base: respondents who did not make a holiday trip in 2008 (and those who had not travelled at all in 2008), by country

The proportion of respondents who did **not have time to go on holiday** ranged from approximately 1 in 20 respondents in Hungary (4%), the Czech Republic (5%), Bulgaria and Lithuania (both 6%) to approximately one-fifth in Cyprus (18%), Slovenia (20%) and Austria (21%). Similarly, the proportion of respondents who did not go on holiday because they preferred to stay at home or with friends or family ranged from 4% in Portugal and Bulgaria to one-sixth of respondents in Sweden and the Netherlands (16% and 17%, respectively) and a quarter of Luxembourgers (23%).

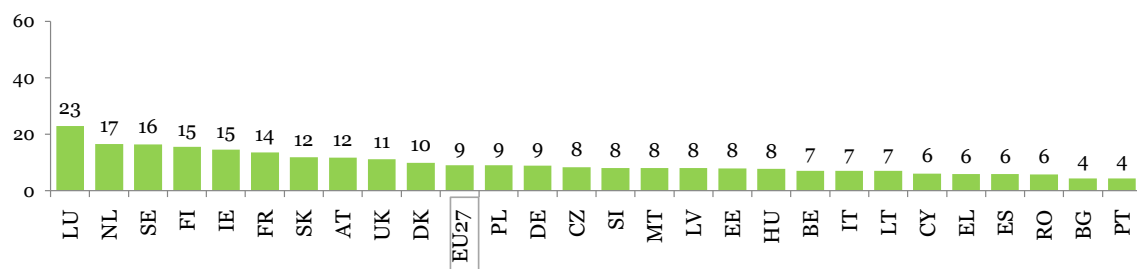
Lack of time as reason for not having gone on holiday in 2008



Q5. What was the main reason why you did not go on holiday in 2008?

%, Base: respondents who did not make a holiday trip in 2008 (and those who had not travelled at all in 2008), by country

Prefer to stay at home or with friends/family as reasons for not having gone on holiday in 2008



Q5. What was the main reason why you did not go on holiday in 2008?

%, Base: respondents who did not make a holiday trip in 2008 (and those who had not travelled at all in 2008), by country

All other reasons for not having gone on holiday in 2008 – as listed in the survey – were selected by less than 1 in 20 respondents in almost all Member States. (For more details, see Annex Table 6a)

Financial reasons were more often cited by women, respondents aged 25 to 54, the least-educated interviewees and manual workers. For example, while 53% of manual workers said financial considerations caused them not to have a holiday in 2008, only a third of self-employed respondents mentioned this as the main reason.

Personal reasons for not having gone on holiday in 2008 were most frequently cited by women, those older than 54 and by respondents with the lowest and highest levels of education. For example, a quarter of the least-educated and most-educated respondents said they had not gone on holiday because of private reasons, compared to one-fifth of those who stopped attending school between the ages of 16 and 20.

A lack of time, however, was mostly cited by men, younger respondents, those with higher levels of education and the self-employed as the main reason not to take a holiday in 2008. For example, a quarter of self-employed respondents said they did not have time to go on holiday in 2008 compared to 6% of non-working respondents. (For more details, see annex table 6b)

3. Characteristics of EU citizens' main holiday trip in 2008

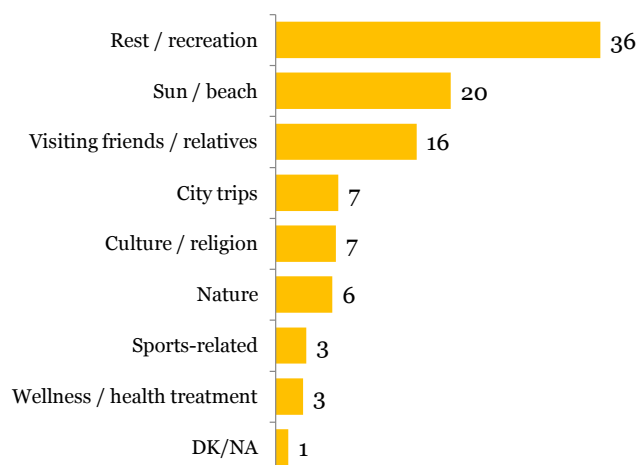
Respondents who took at least one holiday in 2008 were asked a number of questions about that vacation. For example, they were asked to say why they had taken a particular type of holiday (i.e. what was their main motivation/objective), to identify the destination, the method of transport used, to say the time of year when they travelled and how the holiday had been organised.

Note: In this chapter, all results presented focus solely on those respondents who went on holiday in 2008 – for brevity we often refer to these respondents as “holidaymakers”.

3.1 The major motivation for going on holiday in 2008

“*Rest and recreation*” was mentioned as the major reason to go on holiday by more than a third of holidaymakers (36%). One-fifth wanted a *beach holiday* (20%) and 16% said the main objective were social reasons, i.e. to *visit friends or relatives*. “*City trips*”, “*culture and religion*” and “*nature*” were each selected by less than a tenth of holidaymakers (6%-7%). Less than 1 in 20 people who took a holiday mentioned *sports- or health-related* factors as their main objective when going on holiday (both 3%).

The major motivation for EU citizens' main holiday trip in 2008

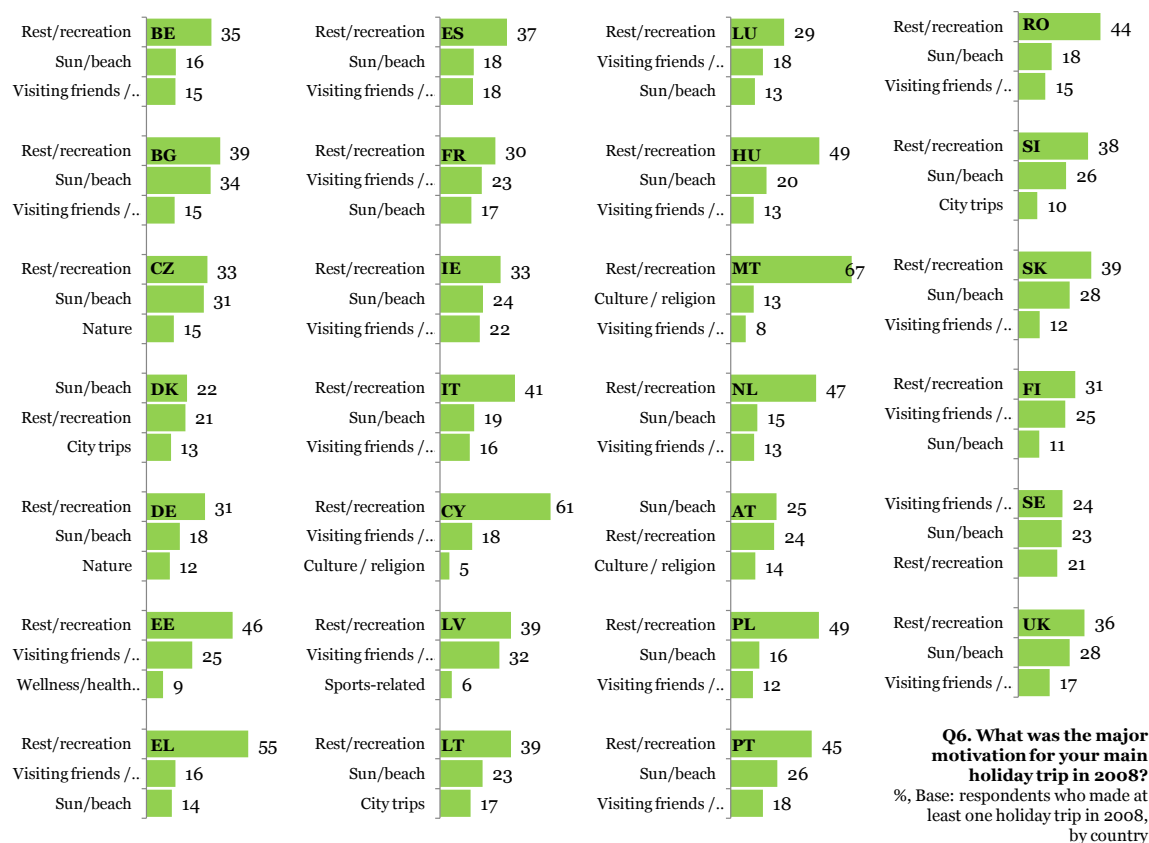


Q6. What was the major motivation for your main holiday trip in 2008?
%, Base: respondents who made at least one holiday trip in 2008, EU27

In a majority of EU Member States, most holidaymakers said they were looking for “rest and recreation” when going on holiday, and going to the beach and visiting friends and/or relatives was in second or third place. For example, “rest and recreation” was mentioned as the main reason for going on holiday by 44% of Romanians, followed by 18% who selected “sun and beach” and 15% who said that the main reason was to visit friends or relatives.

Exceptions to this pattern were, for example, Slovenia, Denmark and Lithuania – in these countries city trips were among the three most popular objectives of a holiday (selected by, respectively, 10%, 13% and 17%). Similarly, in Malta, Cyprus and Austria, respondents were more likely to select “culture/religion” than they were to mention “sun and beach”.

The major motivation for EU citizens' main holiday trip in 2008 (TOP3 motivations)



The 15-24 year olds were more attracted by sun and beach, while those aged over 54 more frequently selected city-trips, cultural/religious holidays and holiday trips focusing on nature. For example, 10% of the over 54s were predominantly interested in visiting cultural and religious sites, while only 6% of the 15-24 year-olds did so.

Self-employed holidaymakers were most likely to mention “rest and recreation” as the main purpose of their holidays (45% compared to, for example, 31% of non-working respondents). Manual workers were more likely to select “beach and sun” (23% vs. 18% of self-employed). Manual workers and non-working respondents more frequently said the main purpose of their holiday was to visit friends and family (20% and 18%, respectively, compared to 13% of employees).

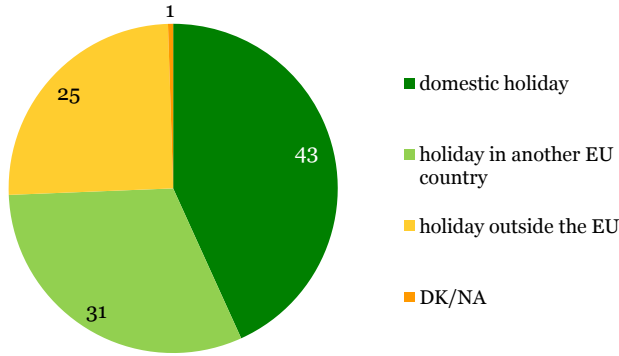
Please note that for further analysis within this report, we will use **four groups of holidaymakers** based on the main focus/objective of their 2008 holiday. These objectives can be summarised as holidays that have:

- a *recreational* focus (i.e. to rest, enjoy nature, go to wellness centre/health spa, etc.)
- an emphasis on going to the *beach*
- 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 to visit family or friends.

3.2 Destination of holiday trips in 2008

More than 4 in 10 people who went on holiday in 2008 spent their main vacation in their own country. Among respondents who travelled abroad, 31% stayed in the EU; the most popular holiday destinations in the Union were Spain (7%), Italy (5%), France (4%) and Greece (3%). Other popular holiday destinations – outside the EU – were Turkey (3%), the US and Croatia (both 2%).

Destination of the main holiday in 2008

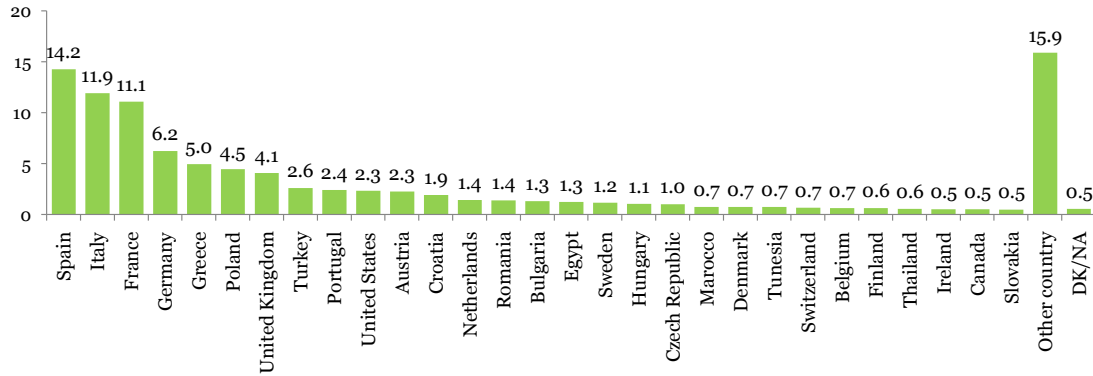


Q7. Where did you travel for your main holiday in 2008?
 %, Base: respondents who made at least one holiday trip in 2008, EU27

The following chart shows the countries where EU citizens spent their main 2008 holiday, regardless of whether the destination was their country of residence or another EU Member State: Spain (14%), Italy (12%), and France (11%) were the countries where most Europeans took a vacation.

After these three, Germany (6%), Greece and Poland (both 5%) and the UK (4%) were the next most cited holiday destinations in 2008. The most frequently named countries outside the EU were Turkey (3%) the US and Croatia (both 2%). In addition, 16% of respondents who had taken a holiday cited a destination where less than 0.5% of their fellow EU citizens took a vacation.

Destination of the main holiday in 2008 – including domestic holidays



Q7. Where did you travel for your main holiday in 2008?
 %, Base: those who made at least one holiday trip, EU27
 Countries mentioned at least 0.5% shown

When exploring the most popular holiday destinations for people who travelled outside their countries of residence, we can see that Spain (13%), Italy (9%) and France (7%) were still the most popular destinations. Germany, the UK and Poland, however, fell behind in this case with just 2.6%, 2% and 0.6% of EU citizens choosing these destinations. After France, Greece was the next most popular holiday destination among Europeans taking a holiday in another country (5%).

Destination of the main holiday in 2008 – excluding domestic holidays



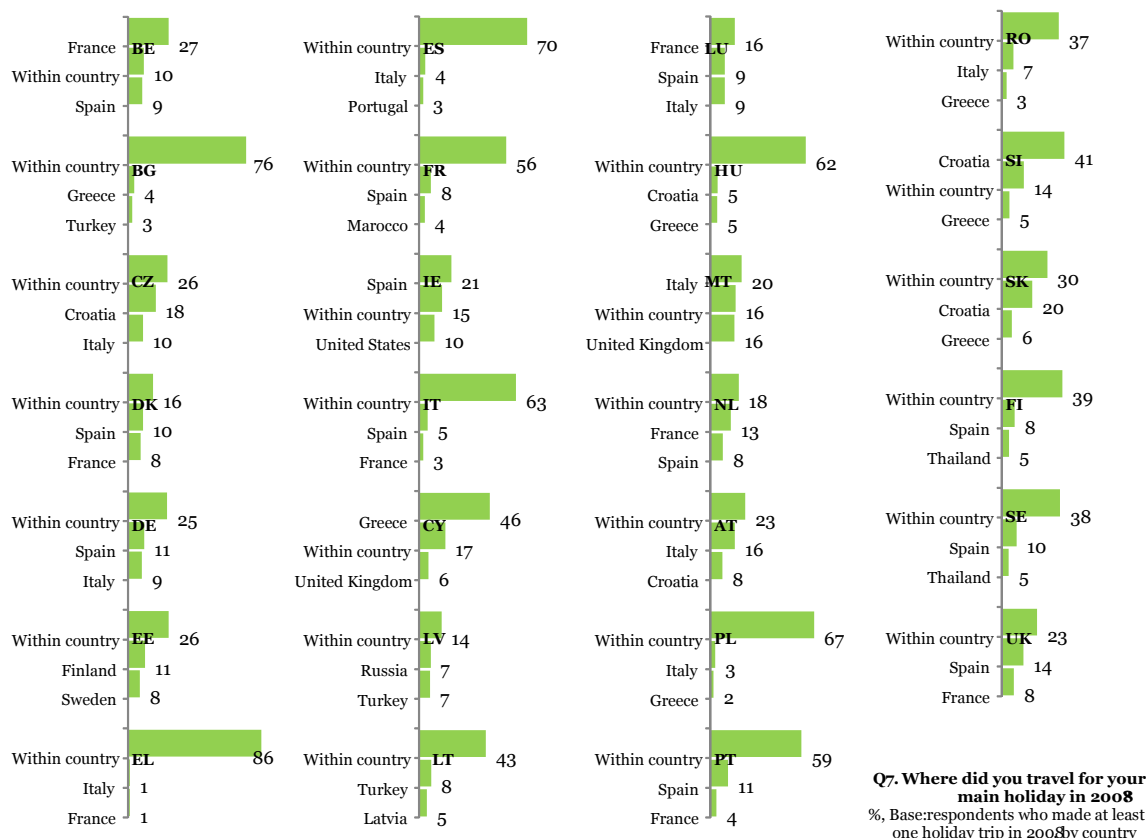
Q7. Where did you travel for your main holiday in 2008?

%, Base: holiday makers who went abroad, EU27
Countries mentioned at least 0.5% shown

Bulgarians, Poles and Hungarians were not only among the respondents who were the most likely not to have gone on holiday in 2008, they were also among the most likely to have spent their holiday in their country of residence (76%, 67% and 62%, respectively). Respondents from France (56%) and the southern European countries – Portugal (59%), Italy (63%), Spain (70%) and Greece (86%) – were also likely to have spent their main holiday of 2008 in their home country. These countries were, nevertheless, also popular holiday destinations among other EU citizens. For example, 16% of Austrians had visited Italy in 2008 and 14% of the British took a holiday in Spain.

Respondents who went on holiday from smaller countries – Belgium, Luxembourg, Slovenia, Malta and Cyprus – and those from Ireland were less likely to have spent their main holiday in their home country. More than 4 out of 10 (46%) Cypriots had travelled to Greece and 41% of Slovenes to Croatia. For Luxembourgers and Belgians, France was the most visited destination (16% and 27%, respectively). Finally, Italy was the most popular holiday destination for Maltese respondents (20%) and Spain played that role for the Irish (21%).

Destination of EU citizens' main holiday trip in 2008 (TOP3 destination)



Travel destination by main objective of holiday (row %)

Main objective of 2008 holiday

Travel destination	Social reasons	Recreation/wellness	Beach	Culture
EU27	15	47	20	18
Resident country	15	52	19	14
Foreign EU country	14	44	21	20
<i>Spain</i>	13	43	29	15
<i>Italy</i>	12	48	20	20
<i>France</i>	19	47	15	19
EFTA	14	53	9	24
EU candidate country	13	39	35	13
North America	46	21	12	22
Asia	16	37	18	29
Africa	14	35	29	22
Pacific	35	30	11	24
Middle and South America	21	39	22	17
Other country	17	45	19	19

Q6. What was the major motivation for your main holiday trip in 2008?

Q7. Where did you travel for your main holiday in 2008?

%, Base: respondents who made at least one holiday trip in 2008, DK/NA not shown

Respondents who went on holiday in 2008 to one of the EU candidate countries (primarily Croatia and Turkey) were, among all holidaymakers, the most likely to have done so to have a beach holiday (35%).

In order to explore why certain holiday destinations were chosen, we investigated how EU citizens chose where to go on holiday in 2008.

Results indicate that those who travelled within their country of residence or to an EFTA¹ country were more likely to want rest and recreation (more than half vs. 47% as the EU average). Together with those who chose a Pacific country as a destination, holidaymakers in one of the EFTA countries were also more likely to visit cultural sights and/or explore different cultures (24%). Compared to other destinations, however, cultural travels were most popular among travellers going to Asia (29%).

Respondents who went on holiday in 2008 to one of the EU candidate countries (primarily Croatia and Turkey) were, among all holidaymakers, the most likely to have done so to have a beach holiday (35%).

¹ Liechtenstein, Iceland, Norway and Switzerland

Furthermore, we looked in more detail at the different objectives that holidaymakers had when visiting the three favourite EU destinations for EU citizens: Spain, Italy and France. While all three were primarily destinations where visitors wanted rest and recreation, we saw that Spain attracted beach holidaymakers (29% vs. 15% for France), France was more likely to be a destination where people visited friends and/or relatives (19% vs. 12% in Italy) and Italy and France were higher on people's cultural agendas (19%-20% vs. 15% for Spain).

Looking at the broader **socio-demographic segments**, we see that men, those in the older age groups, those living in an urban area, the less educated and manual workers or those not working were more likely to have spent their main holiday in 2008 in their own country. For example, nearly half of those with the lowest level of education did not leave their home country to take a holiday, compared to 4 in 10 of those with the highest level of educational attainment (49% vs. 41%).

Those who had spent their holidays in a different EU Member State had an opposite profile: they were typically aged 15 - 24, highly-educated and either self-employed or employees. For example, a third of employees visited another EU Member State for their main holiday break in 2008, compared to a quarter of manual workers (26%) and 3 in 10 of those not working.

Among other differences observed were, for example, that those with the highest level of education and self-employed respondents were more likely to have travelled to Asia than their respective counterparts. (For more details, see Annex Table 8b)

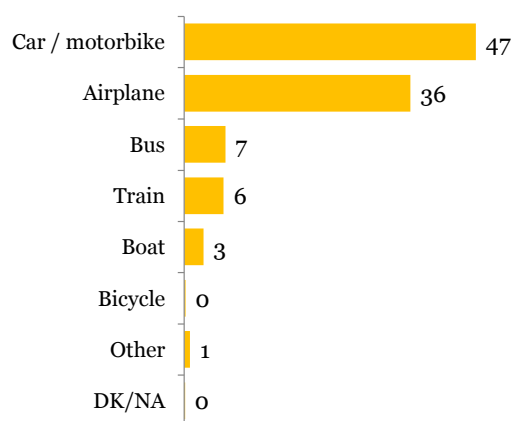
3.3 Methods of transport used for 2008 holidays

Almost half (47%) of holidaymakers had travelled to their holiday destination by car or motorbike, with 36% taking a flight. Less than one-tenth of holidaymakers had travelled by bus (7%), train (6%) or boat (3%).

The Slovenes were the most likely to have travelled by car or motorbike (68%); similar high numbers were seen in Portugal, Bulgaria, France, Romania and Poland (all approximately 60%). These were mostly countries where a majority of holidaymakers had spent their main holiday close to home.

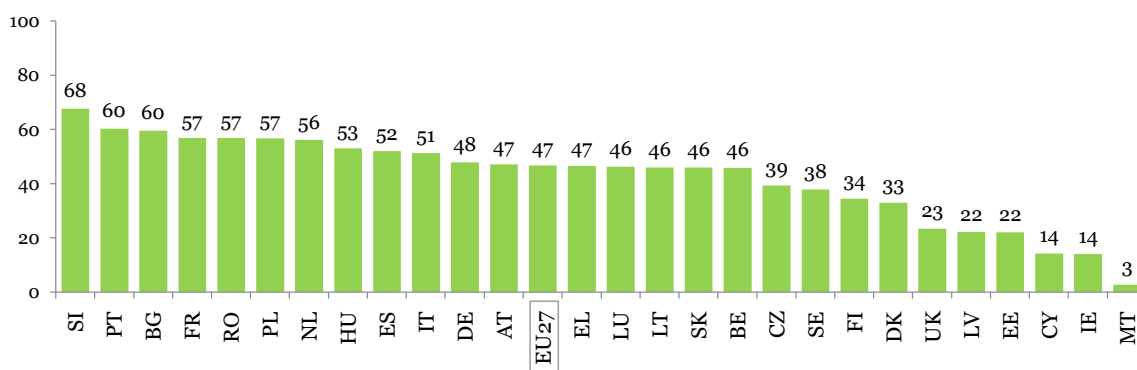
Not surprisingly, these methods of transport were the least popular among holidaymakers from the smaller islands – Malta and Cyprus – and from Ireland. A large majority of holidaymakers in these countries took a flight to go on holiday: 70% in Malta, 78% in Ireland and 82% in Cyprus. In sharp contrast only 7% of Bulgarians, and 15% of Romanians and Poles travelled by plane.

Method of transport for EU citizens' main holiday trip in 2008

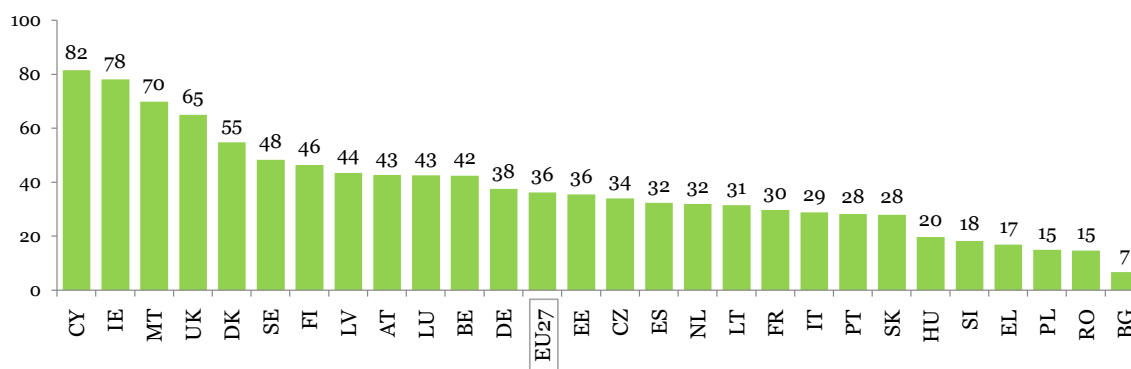


Q8. How did you travel there in 2008?

%, Base: respondents who made at least one holiday trip in 2008, EU27

Method of transport: **car or motorbike****Q8. How did you travel there in 2008?**

%, Base: respondents who made at least one holiday trip in 2008, by country

Method of transport: **airplane****Q8. How did you travel there in 2008?**

%, Base: respondents who made at least one holiday trip in 2008, by country

Holidaymakers from Malta (26%) and Greece – with its many islands – were the most likely to have taken a **boat** to reach their holiday destination. For Estonia (with Finland and Sweden as the most popular holiday destinations, see section 3.2), 16% had travelled by boat.

The **train** was a more popular means of transport for holidaymakers from Poland (14%), Hungary and Romania (both 12%), while only 2% of Greeks, Lithuanians, Irish and Slovenes had travelled by train. Finally, **buses** were most frequently chosen by those who took a holiday from some eastern European countries – Bulgaria (25%), Latvia (23%), Slovakia (20%) and Estonia (19%) - while virtually no

Method of transport for EU citizens' main holiday trip in 2008
(column %)

	Destination of main holiday in 2008		
	Domestic holiday	Holiday within the EU	Holiday outside the EU
Car/motorbike	70	33	25
Airplane	8	52	65
Bus	7	8	4
Train	11	3	3
Boat	3	3	3
Bicycle	0	0	0
Other	1	1	1

Maltese holidaymakers had travelled by bus (1%) (See annex table 9a).

The main method of transport to reach one's holiday location depends of course on the destination itself. A majority of holidaymakers who travelled within their own country had travelled by car or motorbike (70%), while a majority of those who travelled to other countries were most likely to have travelled by plane (52% of those who travelled within the EU and 65% of those travelling outside the EU).

%, Base: respondents who made at least one holiday trip in 2008,

%DK/NA not shown

The following table shows the **differences between socio-demographic groups in the use of the four most popular means of transport**: plane, car or motorbike, train and bus. As the choice of the appropriate means of transport depends – as already stressed - on the distance that the holiday destination is from the holidaymaker's home, the analysis also takes those differences into account (i.e. destination within the country of residence, in a different EU Member State or outside the EU).

With some expected exceptions, a relatively stable pattern of choices between the different socio-demographic groups was observed, independent of their holiday destinations' location. This means that certain groups tended to choose a certain method of transport, more or less notwithstanding the distance the destination was from the holidaymakers' home.

Women (slightly more than men), the oldest and youngest age groups, the least-educated and manual workers made most use of **buses** for their main holidays in 2008. For example, 6% of manual workers used the bus to travel within their country, 13% used one to reach a holiday destination within the EU and 9% travelled by bus outside of the EU. In comparison, from 1%-3% of self-employed did so.

The youngest and oldest age groups were also the most likely to have travelled by **train** to their holiday destination, regardless of where it was located. Moreover, holidaymakers in rural areas were the least likely to take the train, again, irrespective of their holiday destination. For respondents who had spent their holiday in their home country, trains were primarily used by the least educated, those living in metropolitan areas and those not working.

Flights tended to be chosen by women, the 25-39 year olds, those with the highest level of education, the self-employed and employees. There were exceptions: women who had spent their main holiday in 2008 in their home country (8% vs. an equal number of men) and those holidaymakers who had spent their holidays outside the EU - the over 54s tended to take a plane less often to reach their holiday destination (61% vs. two-thirds of the younger age groups).

A **car** (or motorbike), on the other hand, was rather chosen by men – a difference that was particularly obvious in regard to trips to a different EU Member State (37% vs. 29% of women). This means of transport was also more likely to be taken by travellers living in rural areas and those aged 25-54. Respondents who spent their main holiday in 2008 in their own country or within the EU and manual workers were the most likely to travel by car to reach their main holiday destination (81% and 40%).

Method of transport for EU citizens' main holiday trip in 2008 by socio-demographic groups (row, per mean of transport and travel destination %)²

Holidays in..	<i>Airplane</i>			<i>Car/motorbike</i>			<i>Train</i>			<i>Bus</i>		
	Resident country	Foreign EU country	Outside the EU	Resident country	Foreign EU country	Outside the EU	Resident country	Foreign EU country	Outside the EU	Resident country	Foreign EU country	Outside the EU
EU	8	52	65	70	33	25	11	3	3	7	8	4
Sex												
Male	8	51	64	71	37	27	11	3	2	6	6	4
Female	8	53	66	69	29	23	11	4	3	8	10	4
Age												
15-24	7	49	67	58	30	24	20	5	3	10	12	6
25-39	10	59	66	73	31	27	8	2	2	4	4	3
40-54	7	50	66	79	41	27	7	2	2	3	4	3
55+	8	51	61	64	28	23	12	4	4	12	13	5
Education (age)												
Until 15 years	7	50	56	63	28	30	11	4	2	15	11	5
16-20	6	53	61	75	33	28	9	2	3	6	9	4
20+	11	54	70	72	34	22	9	4	2	3	5	3
Still in education	6	45	66	51	33	21	24	6	3	13	10	8
Urbanisation												
Metropolitan	9	54	66	64	30	24	15	4	4	6	7	4
Urban	9	57	66	68	28	22	11	4	3	8	9	4
Rural	6	46	62	75	41	29	9	2	1	7	7	4
Occupation												
Self-employed	11	62	67	76	30	24	6	3	2	1	3	3
Employees	8	57	69	76	34	24	8	2	2	3	4	2
Manual Workers	5	41	61	81	40	26	7	3	2	6	13	9
Not working	7	48	60	62	32	26	14	4	3	12	12	5

Q8 : How did you travel there in 2008

%, Base: respondents who made at least one holiday trip in 2008, without "boat", "others" and DN/NA

² **How to read the table:** In order to visualise the profile of users of the different means of transport, the differences are presented per means of transport (airplane, car/motorbike, train, bus), which are in a second step subdivided according to the location of the travel destination/the location where the travel took place. The numbers on the top left (Airplane/EU) show for example that among those Europeans who spent their main holidays in their home country, only 8% chose the airplane, while half of those Europeans who travelled to a foreign EU country took the plane (52%), as did two thirds of those who travelled outside the EU (65%). When trying to see how choices were made among travellers in the same destination category, the reader has to focus on the respective destination category. For example, when wanting to investigate which was the most popular method to travel among those who travelled outside the EU, we can see that the bulk of those holidaymakers went plane (65%), 25% by car of motorbike, 3% by train and 4% by bus. If here the categories "boat", "others" and DK/NA were added, those results would sum up to 100%. The rows below the EU average show then further in detail the differences between the respective socio-demographic groups in their choices of the means of transport (divided per holiday destination).

3.4 Main periods for holiday travel in 2008

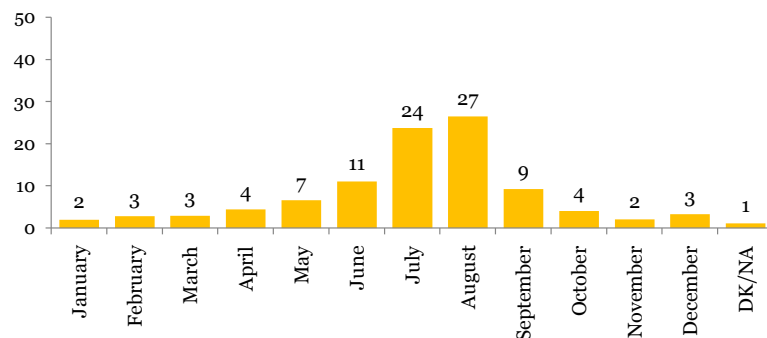
Seven in 10 European holidaymakers started their main holiday trip in or around the summer season: July and August were the most popular months (selected by 24% and 27%, respectively).

When looking at differences across the 27 EU Member States, it was noted that in most countries, a majority of holidaymakers took their main holiday in 2008 in July or August.

The preference for going on holiday in these two summer months was particularly noticeable among holidaymakers from Bulgaria, Poland and Slovakia, where approximately 7 in 10 chose July or August for their main holiday. High numbers of Hungarians (64%) Portuguese and Slovenes (both 63%), Greeks (62%) and Cypriots (61%) also went on holiday in this “high” period.

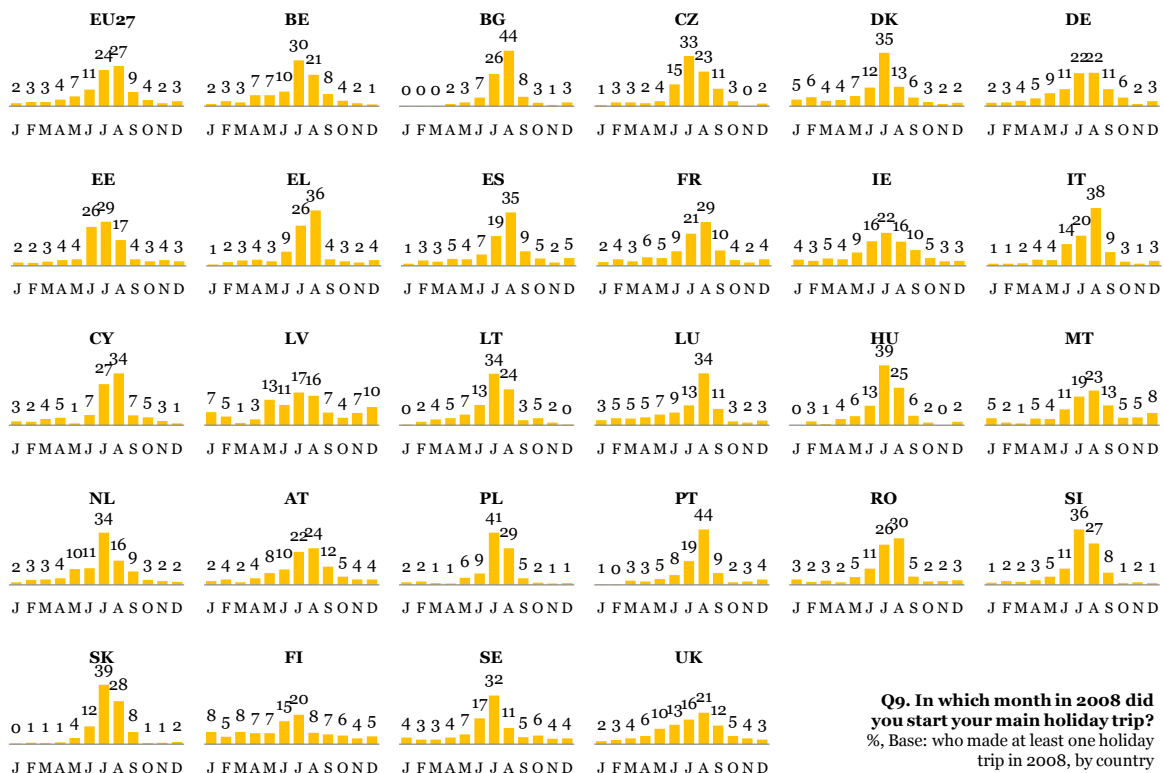
A majority of holidaymakers in Italy and Lithuania (both 58%), the Czech Republic and Romania (56%), Spain (54%), Belgium (51%), France and the Netherlands (50%) also went on holiday in July or August.

Travel period for EU citizens' main holiday trip in 2008



Q7. Where did you travel for your main holiday in 2008?
%, Base: respondents who made at least one holiday trip in 2008, EU27

Month when starting main holiday trip



Q9. In which month in 2008 did you start your main holiday trip?
%, Base: who made at least one holiday trip in 2008, by country

In 11 Member States, the 2008 holidays were less concentrated in July and August, but rather diversified throughout the year. Of these, around 3 in 10 Finns (28%) and Latvians (33%) took their main vacation in this period, as did less than half of interviewees in Denmark (48%), Luxemburg (47%), Estonia and Austria (both 46%), Germany (44%), Sweden (43%), Malta (42%), Ireland (38%) and the UK (37%).

However, even in those countries, the most popular months to take a main holiday were those in the summer high season (July and August), with a relatively high number also starting their trip in the early and late summer. In most of these countries, approximately 1 in 10 holidaymakers chose June and September for their main 2008 holiday. Estonia stood out with a quarter of holidaymakers who started their holidays in June (26%).

Type of holidays by travel period (column %)

Month when main holiday started	Type of holiday			
	Social	Recreation/ rest	Beach	Culture
January-May 2008	21	17	12	28
June-September 2008	66	74	80	58
October-December 2008	11	8	8	13

Q6. What was the major motivation for your main holiday trip in 2008?

Q9. In which month in 2008 did you start your main holiday trip?

%, Base: respondents who made at least one holiday trip in 2008, DK/NA not shown

Period of travel by socio-demographic groups (row %)

	July- August	Rest of the year
EU 27	50	49
<i>Sex</i>		
Male	52	47
Female	49	50
<i>Age</i>		
15-24	61	38
25-39	55	44
40-54	58	42
55+	35	64
<i>Education</i>		
Until 15 years of age	37	61
16-20	50	49
20+	51	48
Still in education	64	35
<i>Urbanisation</i>		
Metropolitan	53	46
Urban	51	48
Rural	49	51
<i>Occupation</i>		
Self-employed	48	51
Employee	54	45
Manual Worker	60	39
Not working	46	53

In the months around the summer (June to September), Europeans preferred to spend their main holiday on the beach or for recreation and/or wellness rather than visiting friends and family or making cultural trips. For other times of the year, however, these latter kinds of holidays were more popular than beach or recreational vacations.

*Q9: In which month in 2008 did you start your main holiday trip?
%, Base: respondents who made at least one holiday trip in
2008, DK/NA not shown*

The socio-demographic analysis of the results show that men, the more educated and those living in rural areas were more likely to have spent their 2008 holidays in July and August (as the table to the right illustrates). Probably due to the influence of school holidays, the youngest respondents were the most likely to have travelled in the two summer months (61%).

The self-employed and those not working - who were probably less constrained in terms of when they went on holiday – more frequently chose to travel outside July and August (51%-53% vs 39%-45% of manual workers and employees).

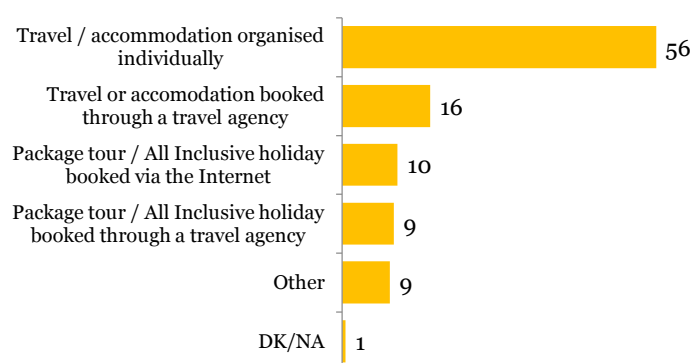
Off-season holidays tended to be preferred by holidaymakers who were over 54, not working or with the lowest level of education.

3.5 How EU citizens organised a holiday trip in 2008

A majority (56%) of holidaymakers across the EU said they had personally organised their main holiday in 2008. One in six (16%) had booked travel tickets or accommodation through a travel agency and a fifth had opted for a package tour, either booked through a travel agency (9%) or via an online travel company (10%).

Holidaymakers who spent their main 2008 holiday in their resident country were more likely to have booked travel and accommodation individually (72% compared to 47% who had travelled to another EU Member State and 42% who had travelled outside the EU).

How EU citizens organised their main holiday trip in 2008

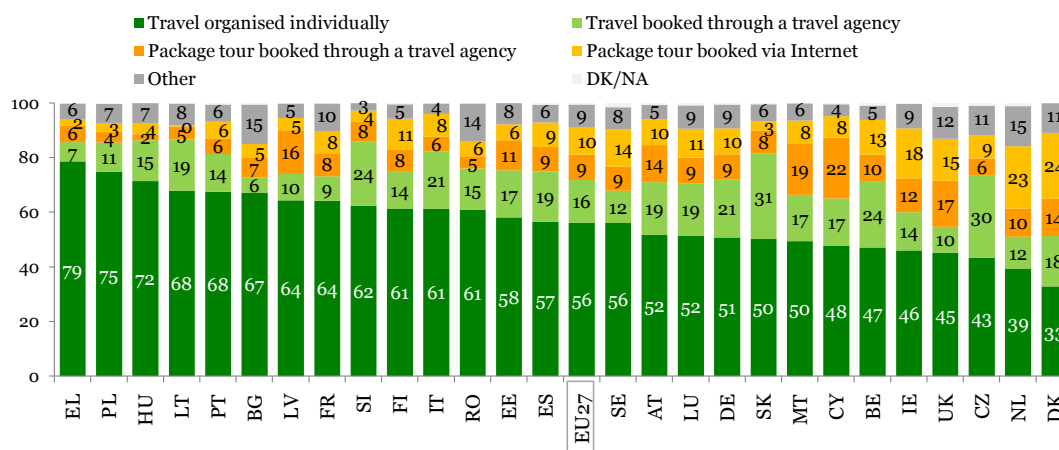


Q10. How did you organize your main holiday trip in 2008?
%, Base: respondents who made at least one holiday trip in 2008, EU27

More than 7 out of 10 holidaymakers in Greece (79%), Poland (75%) and Hungary (72%) had organised travel and accommodation themselves. In fact, in a majority of Member States, more than half had booked their holiday themselves (from 51% in Germany to 68% in Portugal and Lithuania).

In the other nine EU countries, 50% or fewer holidaymakers had organised their holiday themselves. In Slovakia and the Czech Republic, 3 in 10 respondents had used a travel agency to book travel or accommodation (31% and 30%, respectively). In Denmark, the Netherlands, the UK, Ireland, Cyprus and Malta, on the other hand, at least a quarter said they had booked a package tour or all-inclusive holiday through a travel agency or through the Internet (between 27% and 38%). Finally, in Belgium, equal numbers of holidaymakers had booked travel or accommodation through a travel agency or had booked a package tour or all-inclusive holiday through a travel agency or through the Internet (24% and 23%, respectively).

How EU citizens organised their main holiday trip in 2008



Q10. How did you organize your main holiday trip in 2008?
%, Base: respondents who made at least one holiday trip in 2008, by country

Recreation and wellness holidays and – naturally – trips to visit relatives and friends were most frequently organised individually, while holidaymakers who had had a beach holiday or a cultural trip were more often making use of professional help when organising their holidays. For example, approximately five in 10 holidaymakers who went on a beach holiday or visited cultural sights booked travel or accommodation through a travel agency, while only 15% and 9%, respectively, of those who had a recreation/rest/wellness holiday or who visited friends did so.

Organisation of holiday trip by type of holiday (column %)

Organisation of holiday trip	Type of holiday			
	Social	Recreation/ Wellness	Beach	Culture
Travel / accommodation organised individually	71	58	47	47
Travel or accommodation booked through a travel agency	9	15	19	21
Package tour/All Inclusive holiday booked via the Internet	6	10	13	10
Package tour /All Inclusive holiday booked through a travel agency	3	8	14	13
Other	10	9	6	8

Q6. What was the major motivation for your main holiday trip in 2008?

Q10. How did you organize your main holiday trip in 2008?

%, Base: respondents who made at least one holiday trip in 2008, DK/NA not shown

Holidaymakers who had organised their holiday trip individually were more likely to be men, aged 25-54, highly-educated, working and/or living in an urban or metropolitan area. For example, 6 in 10 of the most educated respondents did not use any professional service to organise their holiday trip, compared to 49% of the least educated respondents (see annex table 11b for more details).

4. Financial aspects

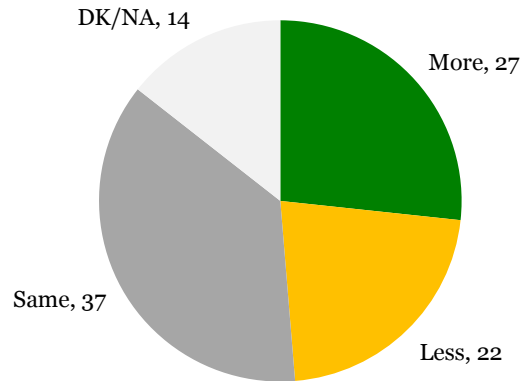
4.1 Amount of money spent on holidays in 2008

A majority of EU citizens felt they had spent more (27%) or the same amount of money (37%) on their holidays during 2008 as compared to 2007. Slightly more than a fifth had spent less money on holidays in 2008. Finally, 14% could not answer this question. The proportion of interviewees who had spent the same amount of money on holidays in 2008 as 2007 ranged from 23% in Lithuania to 55% in Hungary.

A quarter or more of French (27%), Swedish (26%) British and Spanish (both 25%) respondents spent less money on holidays in 2008 than they had in 2007. In Greece, Lithuania, Ireland and Cyprus, on the other hand, respondents were the ones who were the most likely to have spent more money on holidays in 2008 (36%-38%).

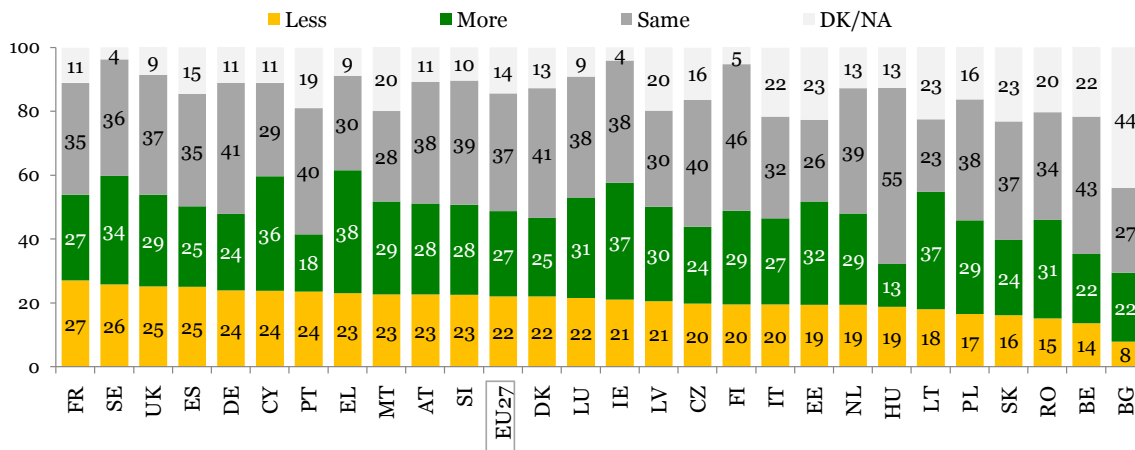
Respondents in Bulgaria stood out from the pack with 44% of respondents who could not say whether they had spent more or less money on holidays.

Money spent for holiday trips in 2008 compared to 2007



Q11. In 2008, did you spend more, less or the same amount of money for all your holidays compared to 2007?
%, Base: all respondents, EU27

Money spent for holiday trips in 2008 compared to 2007



Q11. In 2008, did you spend more, less or the same amount of money for all your holidays compared to 2007?
%, Base: all respondents, by country

The respondents who had spent less money on holiday in 2008 were mainly the 25-39 year-olds and employees. For example, 26% of the latter had spent less in 2008 than 2007, compared to 20% of those not working. The percentage of respondents who had spent more money on holidays in 2008 than in 2007 decreased with respondents' age and increased with their level of education. This means, for example, that 37% of 15-24 year-olds had spent more money on holidays in 2008, while only 20% of those older than 54 and over had done so. Respondents living in urban and metropolitan areas were also more likely to have spent more money on holiday in 2008 (28% and 32%, respectively, compared to 24% in rural areas).

The older the respondents were, the more likely they were to have spent the same amount of money on

holidays (43% of the over 54s compared to 28% of the 15-24 year-olds). This pattern of spending was also somewhat more characteristic for respondents living in rural areas and the self-employed. (For more details, see Annex Table 12b)

When focusing solely on respondents who had been on holiday during 2008, it appears that those who spent their holiday in their home country most frequently said they had spent less money on their holiday(s) in 2008 than in 2007 (23% vs. 15% who had travelled outside the EU). Half (48%) of holidaymakers who had travelled to a country outside the EU said they had spent more money in 2008 than in 2007 (compared to 34% of those who spent their holiday in their home country).

Money spent for holiday trips in 2008 compared to 2007
(column %)

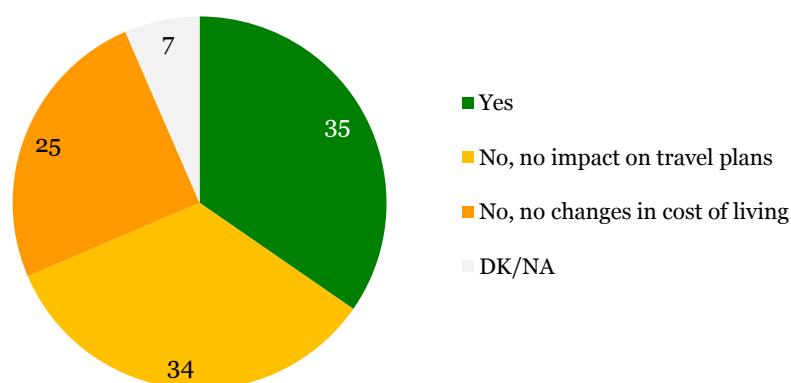
	Destination of main holiday in 2008		
	Domestic holiday	Holiday within the EU	Holiday outside the EU
More	34	39	48
Less	23	17	15
Same	39	40	32
DK/NA	4	4	6

Base: respondents who had made at least one holiday trip in 2008

4.2 Impact of changes in the cost of living on 2008 holiday plans

When asked whether changes in the cost of living had had any (negative) influence on EU citizens' travel and holiday plans in 2008, a similar number of respondents said that such changes had either had no impact (34%) or some impact (35%) on their travel plans in 2008. A quarter of interviewees felt that the cost of living had not changed in 2008.

Impact of changes in the cost of living on travel and holiday plans in 2008



Q12. Did changes in your cost of living have an impact on your 2008 travel / holiday plans?
%, Base: all respondents, EU27

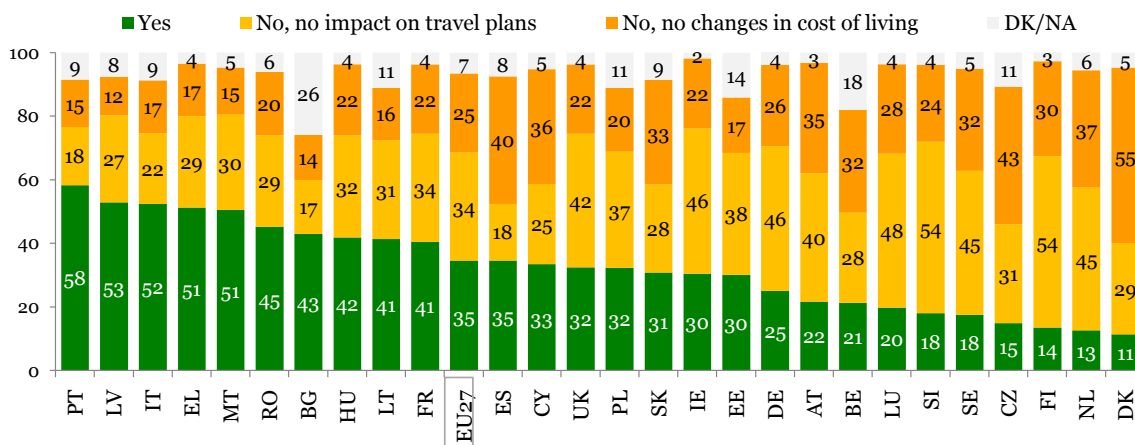
The proportion of respondents who thought that changes in the cost of living had influenced their travel plans ranged from less than one-sixth of respondents in Denmark (11%), the Netherlands (13%), Finland (14%) and the Czech Republic (15%) to more than half of respondents in Malta and Greece (both 51%), Italy (52%), Latvia (53%) and Portugal (58%).

A majority of respondents in Finland and Slovenia (both 54%), and almost half of interviewees in Luxembourg (48%) thought that although there had been changes in the cost of living, these had not had any impact on their travel plans. Bulgarians (17%), Spaniards and Portuguese (18%) respondents, on the other hand, were the least likely to say that their 2008 travel plans had not been affected by changes in the cost of living.

Denmark was the only country where a majority (55%) of respondents thought that there had been no change in the cost of living in 2008. In the Czech Republic and Spain, 43% and 40% of respondents, respectively, shared the Danes' opinion. In sharp contrast, only 12% of Latvians, 14% of Bulgarians

and 15% of Maltese and Portuguese said the cost of living had not changed in 2008.

Impact of changes in the cost of living on travel and holiday plans in 2008



Q12. Did changes in your cost of living have an impact on your 2008 travel / holiday plans?

%, Base: all respondents, by country

Women, 25-54 year-olds, those with lower levels of education and manual workers were more likely to say that changes in the cost of living had influenced their travel plans in 2008. Men, the most-educated respondents, rural residents, the self-employed and employees, on the other hand, were more likely to say that changes in the cost of living had had no impact on their travel plans. For example, 36% men did not change their travel plans and 32% did; the corresponding proportions for women were 32% and 37% respectively.

Respondents who thought there had been no changes in the cost of living were more likely to be young and/or have the highest levels of education. For example, 29% of 15-24 year-olds said there had been no change, compared to 23% of 40-54 year-olds. (For more details, see Annex Table 13b)

In section 3.1., based on the question that asked about the main objective of their major holiday in 2008, we defined four types of holidaymakers: those with a *recreational* focus, those who prefer *beaches, sea and sun*, those who focus on the *cultural* aspects of a holiday and finally, *social* travellers, whose main goal was to visit family or friends.

The table on the right shows that travellers with a social focus were the most likely to answer that changes in the cost of living had influenced their travel plans in 2008 (34%). Travellers who had a cultural focus while on holiday, on the other hand, were the most likely to say that there had not been an impact on their travel plans or that there had been no changes in the cost of living (41% and 32%, respectively).

Impact of changes in the cost of living on travel plans in 2008 (column %)

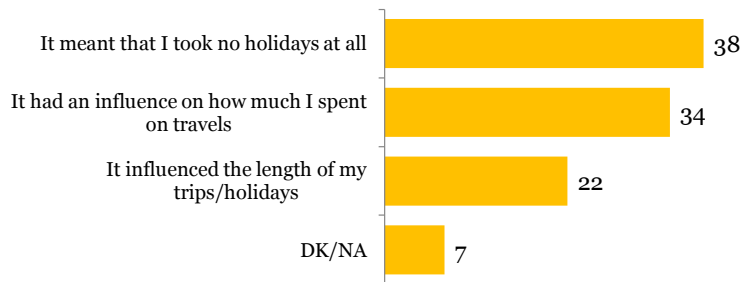
	Focus of main holiday in 2008			
	social	recreation / wellness	beach	cultural inputs
Yes	34	29	28	25
No, no impact on travel plans	37	39	39	41
No, no changes in cost of living	26	29	29	32
DK/NA	3	2	3	2

Base: respondents who had made at least one holiday trip in 2008

Type of impact in the cost of living on travel and holiday plans in 2008

Respondents who said that changes in the cost of living had influenced their travel plans in 2008 were asked to provide details. Nearly 4 in 10 (38%) of these respondents said changes in the cost of living meant that they had not gone on holiday in 2008. One-third (34%) said that they had reduced their holiday expenditures and 22% said they had shortened their usual amount of time spent on holiday.

Type of impact of changes in the cost of living on travel and holiday plans in 2008



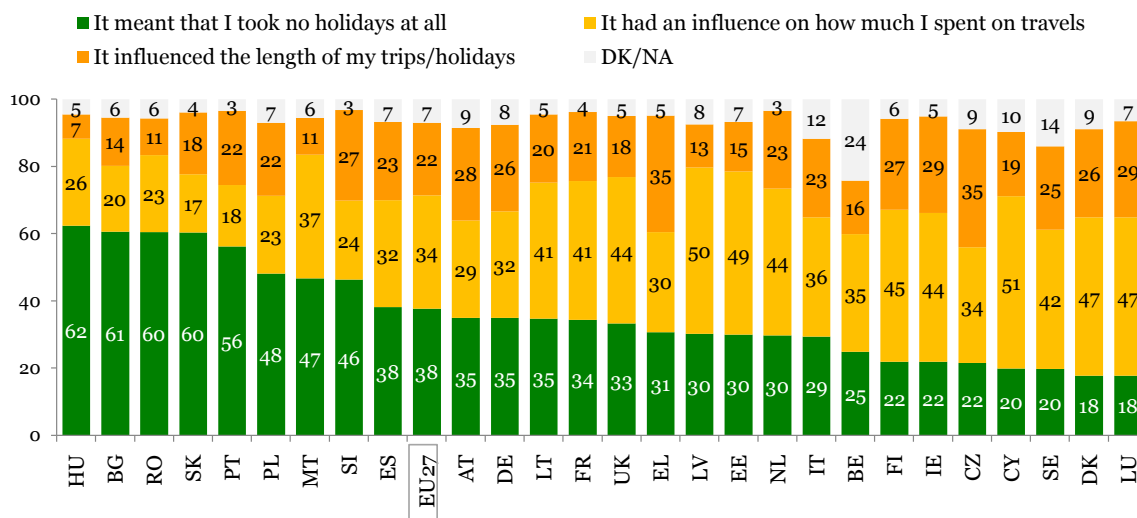
Q12a. How did it impact your 2008 travel / holiday plans?

%, Base: respondents who reported an impact of changes in the cost of living on travel /holiday planes in 2008, EU27

Approximately 6 in 10 Hungarian, Bulgarian, Romanian and Slovak respondents and more than half (56%) of Portuguese respondents – who said that changes in the cost of living had influenced their travel plans – said this meant that they took no holidays at all during 2008. This is in accordance with the fact that respondents in the former countries were among the most likely to cite financial reasons for not having gone on holiday in 2008 (see chapter 2).

Respondents in Cyprus, Latvia, Estonia, Denmark and Luxembourg were the most prone to answer that they had spent less money on holiday during 2008 as a consequence of changes in the cost of living (between 47% and 51%). Czech and Greek interviewees, on the other hand, were the most likely to have simply reduced the length of their holiday trips in 2008 (both 35%).

Changes in cost of living had an influence on how much I spent on travels



Q12a. How did it impact your 2008 travel / holiday plans?

%, Base: respondents who reported an impact of changes in the cost of living on travel /holiday planes in 2008, by country

Older respondents, those with lower levels of education, rural residents, manual workers and non-working respondents were more likely than their counterparts to say that changes in the cost of living meant that they had not gone on holiday in 2008. For example, while half of the least-educated

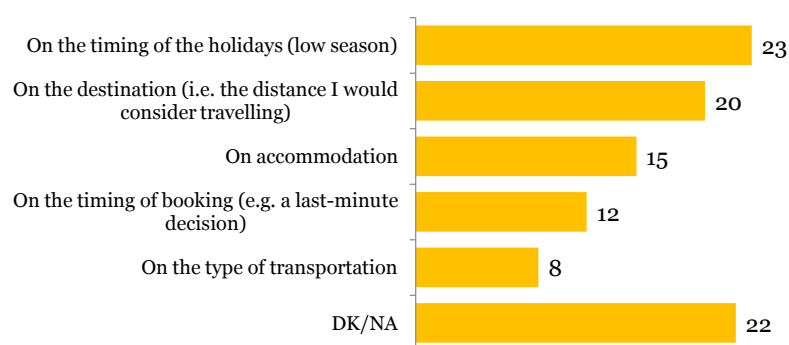
respondents mentioned this type of impact, the most-educated respondents were half as less likely to select this response (25%). Younger respondents, the more highly-educated respondents, city dwellers, the self-employed and employees, on the other hand, more frequently said that changes in the cost of living had meant that they had spent less whilst on holiday or had shortened their usual holiday. (For more details, see Annex Table 14b)

4.3 How EU citizens would save on their holiday budgets

When asked how EU citizens would make savings on their holiday budget, if necessary, a quarter (23%) said they would save money by travelling during the low season instead of the high season and a fifth (20%) said they would change their holiday destination, i.e. they would consider staying closer to home.

Smaller proportions of EU citizens said they would save on accommodation (15%) or the type of transport (8%). One in eight (12%) would consider changing the timing of their booking (e.g. make a last-minute booking). Finally, a fifth of respondents did not know how they would make savings on their holiday budget.

How EU citizens make savings on their holiday budgets



Q13. If you had to make savings on your holiday budget, where would you save?
%, Base: all respondents, EU27

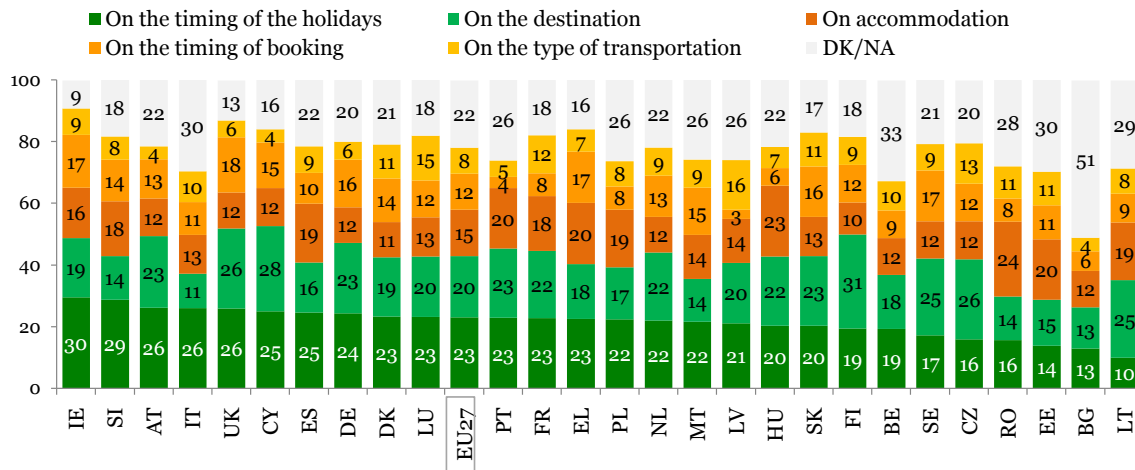
In all EU Member States, a significant number of respondents did not know how they would – or could – save money on their holiday budget; this question was again especially difficult for Bulgarian respondents (51% gave a “don’t know” response). Other countries with a higher level of “don’t know” responses were Belgium (33%), Italy and Estonia (both 30%), Lithuania (29%) and Romania (28%).

Focusing solely on respondents who answered this question, it was noted that in half of the Member States, a relative majority said they would make savings by changing the timing of their holidays; the Irish and Slovenian respondents were the most likely to select this response (30% and 29%, respectively).

Respondents in Finland, Cyprus, the Czech Republic, the UK, Sweden and Lithuania, on the other hand, more frequently said they would save money by changing their holiday destination (between 25% and 31%). In these countries, the proportion of respondents selecting this response was higher than the proportion who said they would change the timing of their holiday.

In three countries, a relative majority of respondents said they would consider looking for cheaper accommodation options: 24% in Romania, 23% in Hungary and 20% in Estonia.

How EU citizens make savings on their holiday budget



Q13. If you had to make saving on your holiday budget, where would you save?
%, Base: all respondents, by country

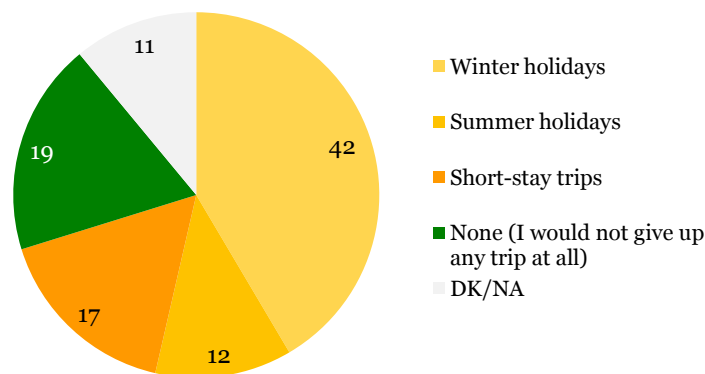
The largest differences across socio-demographic groups were observed in the proportion of “don’t know” responses. It appeared that older respondents, those with lower levels of education and non-working respondents found it more difficult to answer this question. For example, 25% of the over 54s gave a “don’t know” response compared to 11% of the 15-24 year-olds. It was seen in chapter 1 that it was exactly these groups of respondents who were less likely to have travelled for private reasons during 2008.

Focusing solely on the respondents who did answer this question, some of the differences that appeared were that younger respondents were more likely to consider saving on transport or that manual workers more frequently selected saving on accommodation. (For more details, see Annex Table 15b)

4.4 Types of holiday trips that would the first to be cancelled if savings were needed

If EU citizens had to make savings on travel plans and holidays, they would be most willing to give up a winter holiday (42%). Only 12% would be ready to cancel their summer holiday and 17% would give up short-stay trips. Finally, one-fifth (19%) said they would not give up any kind of holiday and 11% did not know which holiday they would give up first.

Type of holidays EU citizens would give up first to make savings on travel plans and holidays

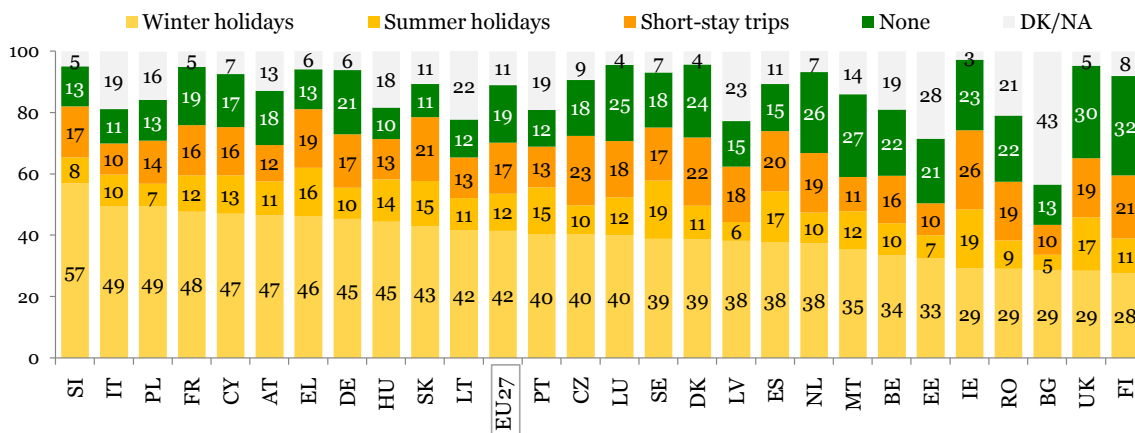


Q14. If you would have to make savings on your travel plans and holidays, what kind of holidays or trips would you be prepared to give up or to reduce first?
%, Base: all respondents, EU27

A relative majority of respondents in all Member States – except for Finland, UK and Bulgaria – said they would be most likely to give up their winter holiday when trying to save money on their travel budget; the proportion selecting this type of holiday ranged from slightly less than 3 in 10 respondents in Finland, the UK, Bulgaria, Romania and Ireland (28%-29%) to almost twice as many respondents in Slovenia (57%). Respondents in Finland and the UK were as likely to state that they would not cancel any type of holiday (32% and 30%). More than 4 out of 10 respondents in Bulgaria, did not know which holiday they would give up first.

The proportion of respondents who answered that they would give up summer holidays was less than one-fifth in all countries (ranging from 5% in Bulgaria to 19% in Sweden and Ireland). The proportion that would reduce the number of short-stay trips or give them up in order to save money was slightly higher in most countries (ranging from 10% in Bulgaria, Italy and Estonia to 26% in Ireland).

Type of holidays EU citizens would give up first to make savings on travel plans and holidays



Q14. If you would have to make savings on your travel plans and holidays, what kind of holidays or trips would you be prepared to give up or to reduce first?
%, Base: all respondents, by country

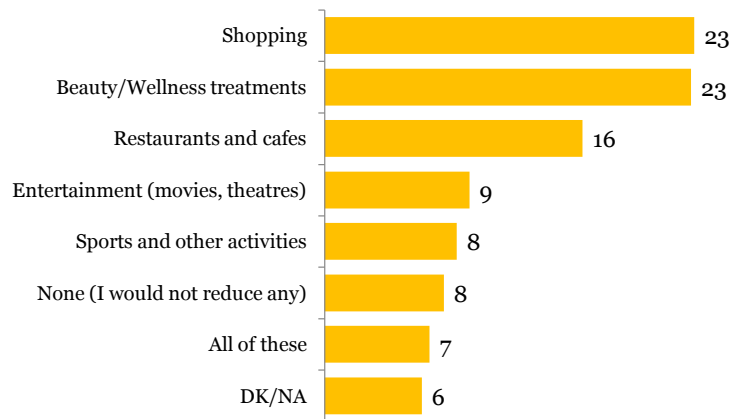
The socio-demographic group analysis – once again – showed that older respondents, those with lower levels of education and non-working respondents found it more difficult to answer this question. For example, 21% of the least-educated respondents gave a “don’t know” response compared to only 7% of the most-educated respondents. (For more details, see Annex Table 16b).

4.5 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 shopping and beauty or wellness treatments (both 23%). One in six (16%) said they would reduce visits to restaurants and bars to save money while on holiday, and approximately one-tenth would try to save money on entertainment or sports activities (9% and 8%, respectively).

Finally, 8% would reduce none of the listed leisure activities, while a similar proportion 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



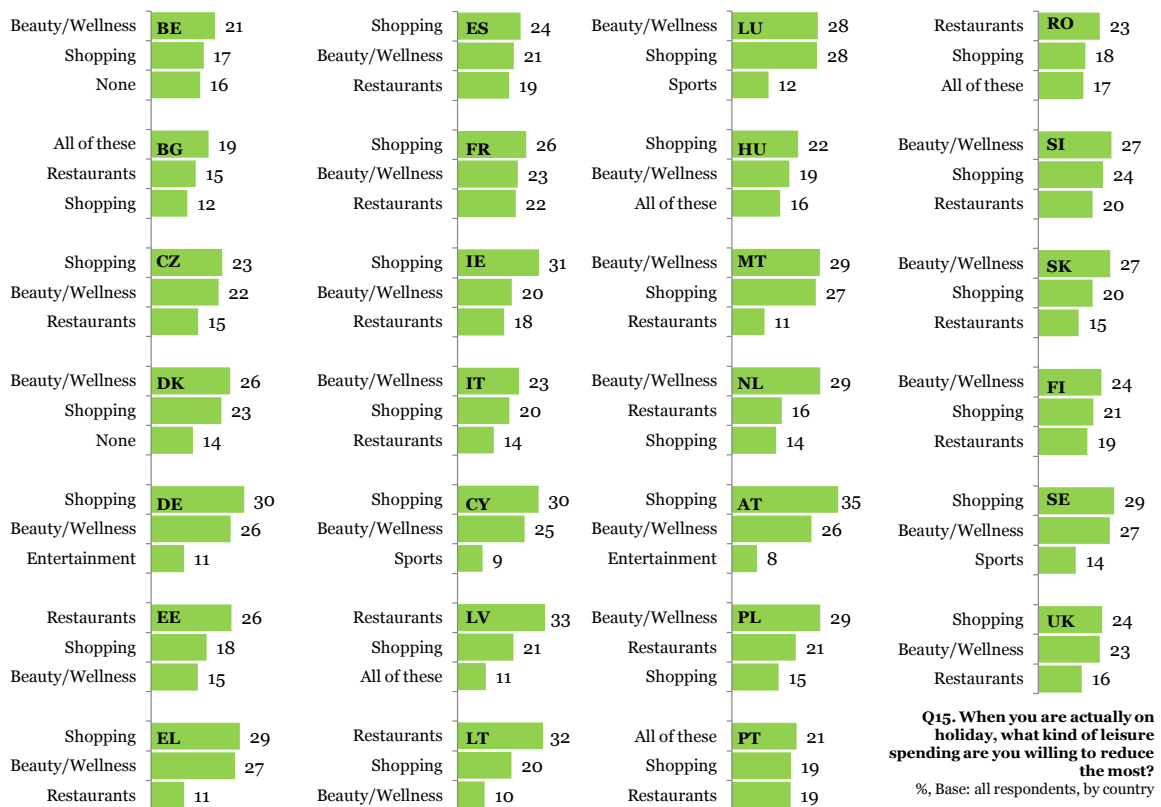
Q15. When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?

%, Base: all respondents, EU27

The chart on the following page shows – for each country – the most frequently mentioned holiday leisure activities that respondents would consider reducing. A first glance shows that interviewees in a majority of EU Member States selected the same leisure activities: they were most willing to reduce or give up shopping, beauty/wellness treatments and visits to restaurants and cafes while on holiday. For example, 27% of Slovak respondents selected “beauty or wellness treatments” (in 1st position), 20% mentioned “shopping” (in 2nd position) and 19% selected “restaurants and bars” (in 3rd position).

The most notable exceptions to this pattern were – once again – Portugal, Bulgaria, Romania, Hungary and Latvia; in these countries, more than a tenth of respondents said they would give up or reduce all types of activities when trying to save money while on holiday.

Holiday leisure activities that EU citizens would reduce most to save money when on holiday (TOP3 considerations)



Q15. When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?
%, Base: all respondents, by country

Older respondents, those with lower levels of education and non-working respondents were not only again more likely not to answer this question, they were also 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, while 5% of the most-educated respondents gave this response, this proportion was twice as high for the least-educated respondents (11%).

5. Considerations when planning a holiday and choosing a destination

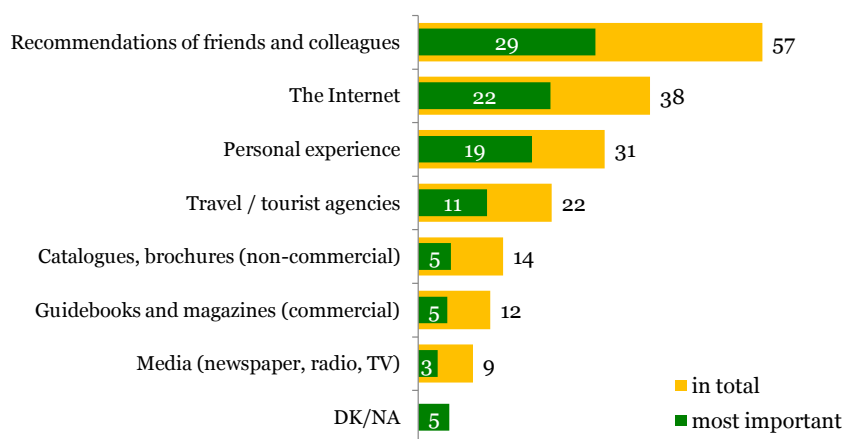
5.1 Sources of information used when making holiday plans

When respondents were asked to define the *primary information source* they used when choosing a holiday destination, they opted for **recommendations of friends and colleagues** as a matter of priority; almost 3 in 10 (29%) chose this subject. About one in five respondents (22%) said they used **the Internet** and almost the same percentage mentioned **personal experience** (19%). About 1 in 10 respondents considered that **travel/tourist agencies** were the best sources (11%). All other sources were chosen by 5% or less of interviewees.

Respondents were also asked which source they would choose *as a second priority* in their country. Adding up the percentages of the *first* and *second* selections, we found that the above ranking of information sources remained the same at the EU level.

Fifty-seven percent of respondents thought that recommendations of friends and colleagues should be given the first or second priority in their country. Using the same logic, the Internet was considered to be the main source by 38% of respondents, and a lower proportion (31%) mentioned personal experience. Other ratings were travel/tourist agencies (22%), non-commercial brochures (e.g. those of a regional tourism association, or similar, 14%), commercial guidebooks (12%) and the media (just 9%).

Information sources when deciding about holidays



Q19a. 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?

Q19b. And what is the second most important?

%, Base: all respondents, EU27, DK/NA shown for the first option only

Which information source do you consider to be the most important when you make a decision about your travel/holiday plans? (% , first and second choice combined)

	Preferred destinations³	
	Traditional, well-known	Non-traditional
Personal experience	34	26
Friends and colleagues	60	58
Guidebooks and magazines (commercial)	11	15
Catalogues, brochures (non-commercial)	15	15
The Internet	37	47
Travel / tourist agencies	24	23
Media (newspaper, radio, TV)	9	10
DK/NA	2	1

Approaches of traditional vs. non-traditional holidaymakers

As seen above, Europeans generally prefer non-institutional sources of information: the three most preferred sources (recommendations of friends and colleagues, the Internet and personal experience) are – in part or totally – independent of any particular or general business interests of the tourism industry.

The table above shows that those respondents with a preference for “off the beaten track” holidays rely heavily on the Internet: almost half of these respondents said they seek information online vs. just over a third of more “traditional” holidaymakers. The Internet has clearly become the most influential information source, of a non-personal nature, for holiday planning.

Analysing respondents’ choices by the focus of their main 2008 holiday, we see that travel agencies are the preferred sources of (institutional) information. Holidaymakers who prefer a holiday with a cultural focus indicated that they rely on information obtained from travel agents (see table below). Guidebooks, however, are given slightly more preference by those who favour non-traditional destinations (15% mentioned these either in the first or second place, versus 11% of those who like to travel to more conventional destinations) and also by those who look for cultural experiences during their vacation (18%).

Sources of information by desired focus of the holidays
(column %)

	Focus of the main 2008 holiday			
	social	recreation / wellness	beach	cultural inputs
Personal experience	37	32	30	24
Friends and colleagues	59	59	60	55
Guidebooks and magazines (commercial)	10	13	10	18
Catalogues, brochures (non-commercial)	14	14	15	18
The Internet	44	48	48	45
Travel / tourist agencies	18	20	22	25

³ For a detailed analysis of these attitudes, refer to section 3.4

Media (newspaper, radio, TV)

10

8

8

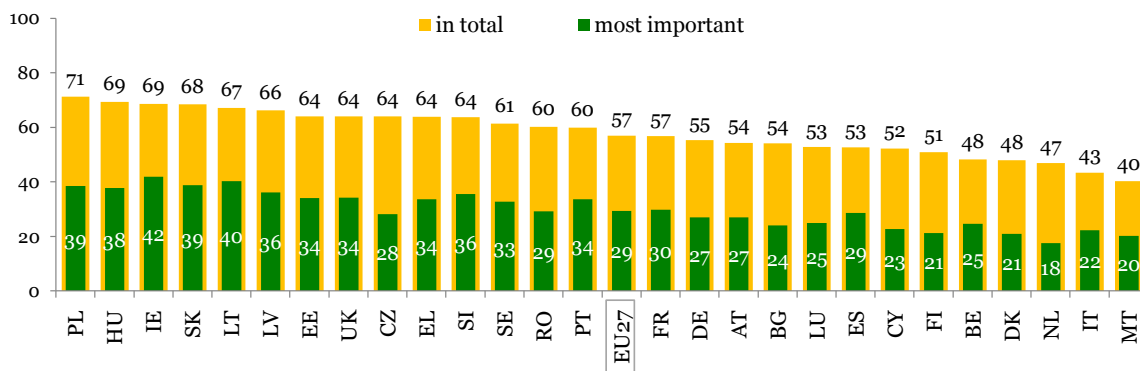
11

Country analysis

In the following section, we look at variations by Member State, based on the *total percentages* of respondents who indicated that a particular source should be addressed as a *first* or *second* priority

Considering individual Member States separately, **recommendations from friends and family** (the overall most preferred choice) was favoured by most respondents in 23 Member States.

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



Q19a. 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?
Q19b. And what is the second most important?
%, Base: all respondents, by country

Such word-of-mouth recommendations were the most pronounced in Poland, Hungary, Ireland, Slovakia, Lithuania and Latvia - at least two-thirds of interviewees referred to this source in the first or the second place. About 4 in 10 respondents in these countries referred to information obtained from their social network as the single most important source when deciding about holiday plans.

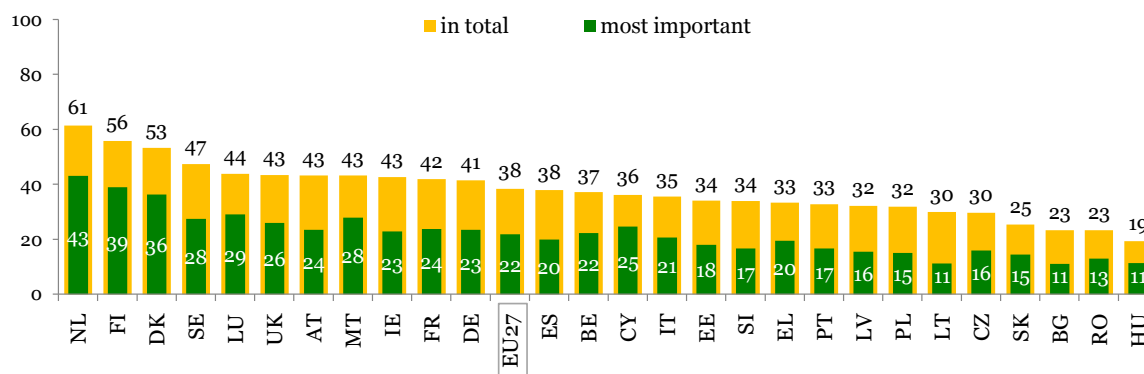
Across socio-demographic segments the survey found little or no variation as to how important friends and colleagues were in providing information to help holiday planning (see Annex Tables 21b and 22b).

As to the relevance of **the Internet as an information source in holiday planning**, the survey showed significant differences across Member States. The penetration of Internet / broadband access is, of course, closely related to the proportion of people who can use it for travel planning. As broadband penetration is the highest in countries that have a greater proportion of people who take holidays, then certain countries will tend to make more use of the Internet⁴. The survey shows that the most enthusiastic users of online information resources for holiday planning are those from the Netherlands (61%), Finland (56%) and Denmark (53%). In Malta, 43% of respondents indicated that

⁴ see EB68.2 E-Communications Household Survey:
http://ec.europa.eu/public_opinion/archives/ebs/ebs_293_full_en.pdf

they used online resources for holiday planning, with the Internet being considered as their most important information source.

Information source: **Internet**



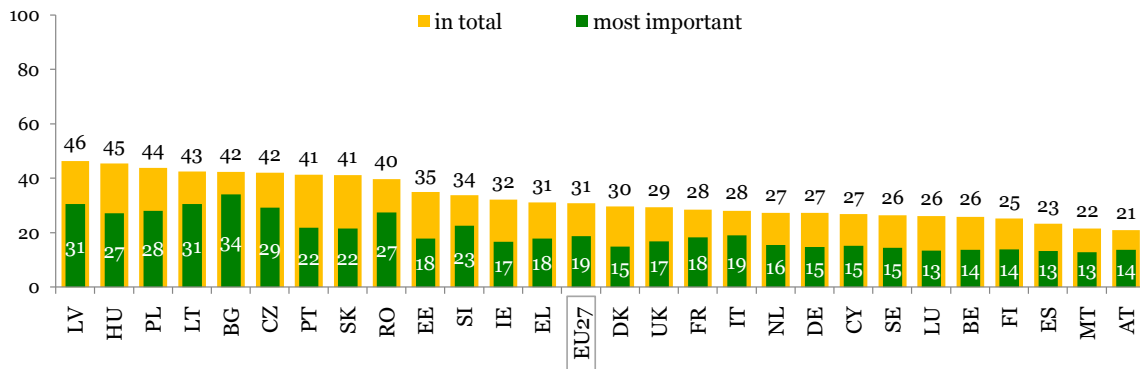
Q19a. From the following information sources, which one do you consider to be the most important when you make a decision about your travel / holiday plans?
Q19b. And what is the second most important?
%, Base: all respondents, by country

On the other hand, there are four countries where a quarter of citizens or less refer to Internet-based information when deciding on holiday/travel plans: 19% of respondents in Hungary, 23% in Romania and Bulgaria and 25% in Slovakia mentioned online research as one of the two most important ways of collecting information.

The use of the Internet for holiday planning is closely associated with age. While more than half of those under 40 said they used such resources, only 21% of Europeans aged over 54 use online information for that purpose. A consequence of this pattern is that significantly less non-working (predominantly retired) people are using such resources (see Annex Tables 21b – 22b).

EU citizens living in metropolitan areas are the most likely to use online information of travel planning (46% vs. only 36% in the rural areas). Those with longer education careers were also clearly more inclined to refer to such resources, e.g. 49% of the most-educated respondents preferred online information versus 19% of those with the lowest level of education. Finally, men were more likely to seek Internet-based information in relation to vacation planning than women (43% vs. 36%).

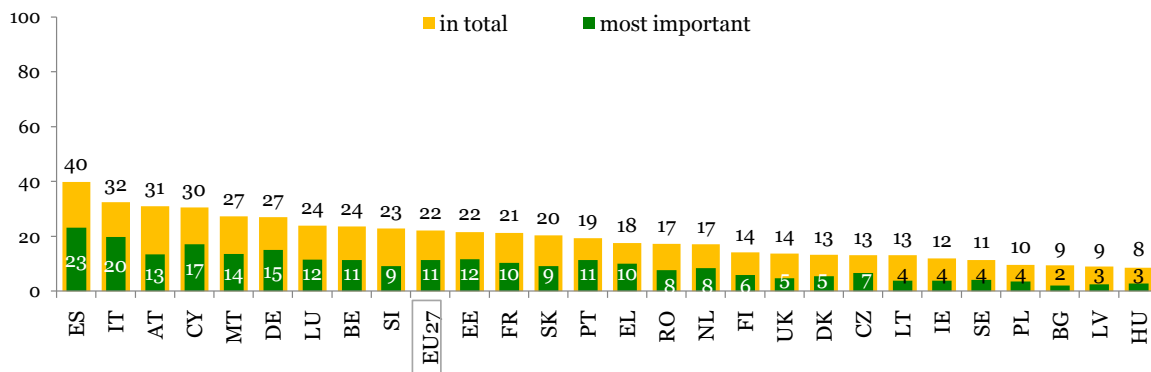
Making holiday decisions based on **personal experience** is most important in some of the post-2004 Member States: Latvia (where 46% selected this option as the first or second most important resource for decision making), Hungary (45%), Poland (44%), Lithuania (43%), Bulgaria and the Czech Republic (both 42%). With about a third of respondents (34%) referring to this option, Bulgaria was the country where prior direct experience was considered as the most important basis for decision making.

Information source: **personal experience**

Q19a. 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?
 Q19b. And what is the second most important?
 %, Base: all respondents, by country

Citizens from the pre-2004 Member States (together with Cyprus and Malta) seem to be more adventurous in planning their vacation, with significantly less people relying on their earlier personal experiences when making a decision about future holidays. Austria (21%), Malta (22%) and Spain (23%) had the lowest share of such replies. The analysis of the socio-demographic segments adds little to the understanding: the variance across segments remains extremely limited – direct personal experiences are valued similarly across all broad socio-demographic categories within the EU.

Respondents in Spain were the most likely to name **travel agents** as useful sources of information for holiday planning: a quarter (23%) mentioned such companies as the most important source of information and overall 40% indicated them as one of the first two sources.

Information source: **travel and tourist agencies**

Q19a. 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?
 Q19b. And what is the second most important?
 %, Base: all respondents, by country

It can be seen that the rank order in the country breakdown for the use of travel agencies (as sources of advice) is almost a mirror image of the previous one (the consideration of “personal experience”): countries where personal experience was ranked relatively high were those where respondents were the least inclined to refer to travel agents and vice versa.

Consequently, there is again a division between pre- and post-2004 Member States, but this time in the opposite sense: people in Member States that joined the EU in 2004 or later were markedly less likely to rely on travel agents to assist in their holiday planning, e.g. Hungary (8%), Latvia and Bulgaria (both 9%).

As for the socio-demographic segments, we see a completely opposite pattern compared to Internet usage: travel agents were used more by the older respondents, the less educated, rural dwellers and

women. However, differences across the various segments were less pronounced than in the case of Internet.

The most use of **non-commercial catalogues or brochures** was seen in Denmark (23%). About one in five respondents also mentioned them in Belgium, the Czech Republic, France, Malta, Slovenia, Slovakia, Finland, Sweden and the UK (Annex Table 21a and 22a). Fewer respondents used them for travel planning purposes in Lithuania (4%), Portugal (5%) and Latvia (6%).

Guidebooks and travel magazines attained a similar (however slightly lower) level of importance in assisting citizens when they make decisions about their holidays; most people mentioned these sources in Greece and Cyprus (both 18%).

From a socio-demographic viewpoint, these specialised print publications seem to be used more frequently by older respondents: the over 55s and those not working (of which a significant number are retirees) were more likely than others to rely on such a resource when planning their holidays.

Finally, **media** products and programmes were regarded as the least important source. Only five Member States did *not consider* the media to be the least important: Estonia, Greece, Latvia, Lithuania and Romania. In all other countries it was the least frequently mentioned option (either the single one, or tied with one of the specific print materials). The highest rating for the media was recorded in Romania, where 16% considered it to be amongst the two most important resources.

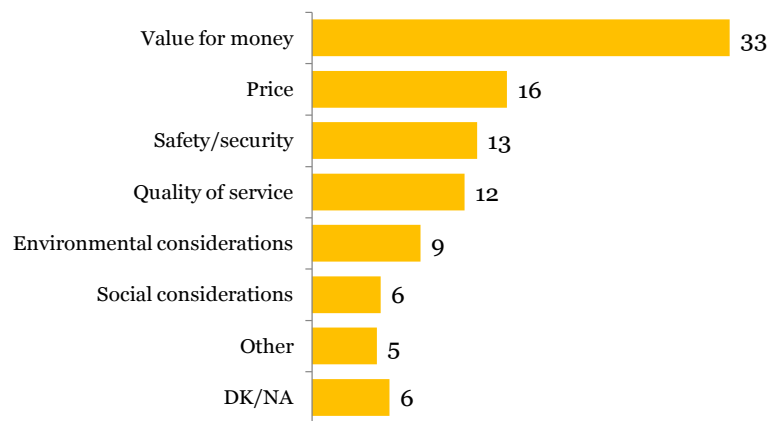
5.2 Key considerations

European tourists prefer **value for money** rather than low prices when considering their vacation plans.

When asked about the most important factor they considered when deciding about a holiday, 33% opted for value for money. **Price** was the choice of one in six (16%). Safety and security at the destination was an important factor for 13%, and a similar number (12%) indicated that they usually focused on quality – not necessarily in conjunction with the associated costs.

Social and environmental (e.g. a preference to travel to places with a low level of pollution or which allow responsible travel) considerations were last in the list of factors, with respectively, 6% and 9% of the replies.

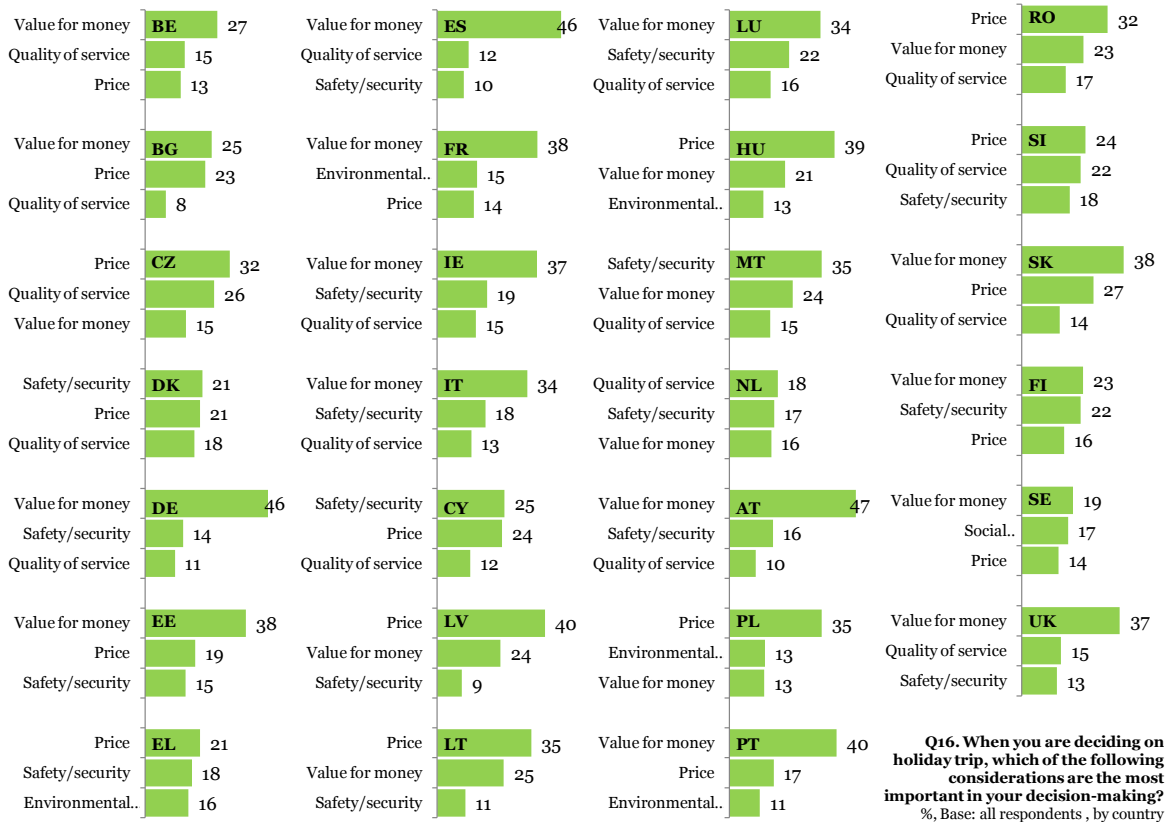
The most important consideration when deciding on a holiday trip



Q16. When you are deciding on holiday trip, which of the following considerations are the most important in your decision-making?
%, Base: all respondents, EU27

As the chart below shows, in most countries people considered value for money as the main decision-making criterion (in 15 Member States). Price (i.e. a low cost) was the primary consideration in eight Member States (all of them being less affluent ones, most of them post-2004 members).

The most important consideration when deciding on a holiday trip (TOP3 considerations)



Price was an overriding concern in countries where, proportionally, the least numbers of people take holiday trips – indicating that the reason for a lack of travel is a lack of disposable income. Countries where price was clearly the main concern are Hungary, Poland, Romania, Latvia and Lithuania. On the other hand, value for money was the more important consideration in countries such as Austria, Germany, Spain and Portugal.

Safety/security of the destination was the most important aspect for respondents in Cyprus (only nominally, as budget was equally important) and for those in Malta. Dutch holidaymakers were divided, as most decisions criteria were used by more or less equal-sized groups; marginally, those who look for quality were in the majority.

As for social segments, considerations varied to a small extent (Annex Table 18b). In every group, value for money was the prime consideration of those listed. In the groups where it was mentioned by fewer respondents, the proportion of those who did not answer (e.g. because they were less likely to travel, see section 1.1) was relatively higher. Such ‘don’t know’ answers were most frequently given by those in the oldest age group (55+: 11%, compared to 6% on average) and the least educated (12%, vs. 4% of those with the highest education levels).

It is remarkable that there were only two broad socio-demographic segments where quality (in itself) was the more likely prime consideration compared to price: those with the highest level of education (14% vs. 12% for price) and the self-employed (16% vs. 10%). However, even in these groups, an optimal balance of the two factors was desired.

It is noteworthy that men were more inclined to select value for money compared to women (36% vs. 31%, respectively), while women valued safety/security (15% compared to 11% of men).

Holidaymaker profiles: objectives vs. decision-making criteria

Value for money remains the main consideration for all types of holidaymakers. In section 3.1., based on the question that was asked about the main objective of their major holiday in 2008, we defined four types of holidaymakers: those with a *recreational* focus, those who prefer *beaches, sea and sun*, those who focus on the *cultural* aspects of a holiday and, finally, *social* travellers, whose main goal was to visit family or friends.

Main consideration for selecting a destination

by desired focus of the holidays and destination preference (column %)

	Objective of the main 2008 holiday				Preferred holiday destinations	
	social	recreation / wellness	beach	culture	traditional, well-known	emerging destination
Quality of service	13	14	16	11	12	13
Price	15	11	13	9	17	12
Value for money	30	38	40	40	35	34
Environmental considerations	8	11	6	10	8	11
Social considerations	9	5	5	8	5	8
Safety/security	15	12	13	13	14	14
Other	7	6	5	6	5	5

Probably the most prominent finding in the table above is that “social” holidaymakers (visiting family and friends) rank budget travelling as relatively more important than the other defined groups (e.g. 15% vs. 9% of those making cultural trips) and they are the least likely to consider value for money when planning a trip (30% vs. 40% for those heading for the beach or making cultural trips). Quality in itself was most frequently indicated by those who favour beach holidays (16%).

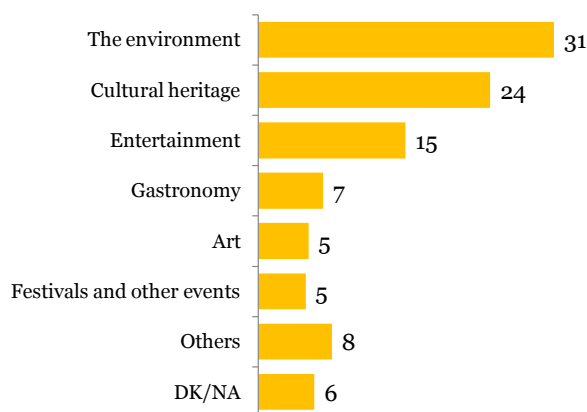
Cost in itself is relatively not the most important consideration when Europeans are looking at newly emerging destinations. Price as the sole consideration is more likely to be considered by those who plan their holiday to a more traditional destination (17%) as opposed to those who seek an emerging destination (e.g. something off the beaten track: 12%, see table above again).

5.3 Choosing a destination

When deciding on holiday destinations, most Europeans named **the location’s environment** (e.g. its overall attractiveness) as the key consideration (31%). **Cultural heritage** (24%) and **the options for entertainment** (15%) were the second and third most widespread responses in regard to factors that influenced a choice of destination.

These three categories dominated the responses in each Member State (see Annex Table 23a); the rest of the listed attractions were considered as having a major influence on holiday decisions by significantly fewer Europeans (**gastronomy**: 7%, **arts**: 5%, **festivals, events**: 5%). Eight percent cited other

Attractions influencing the choice of destination



Q20. From the following attractions, please choose the one that has the major influence on your choice of destination?
%, Base: all respondents, EU27

reasons and 6% had nothing to say.

Cross-analysis: the influence of various types of attraction vs. the objectives of respondents' main 2008 holiday

If we analyse the importance of the various attractions by the respondents' main objective of their 2008 holiday (e.g. the categories derived from the replies given to the question that asked about the main objective that led to a particular destination choice (Q6), as discussed in section 3.2), clear differences across various holidaymaker segments emerge in terms of which kind of attractions are important for groups having different fundamental objectives.

For example, the destination's overall environment has most influence on decision making for those for whom recreation is the focus (just to rest/relax, to enjoy nature etc.). On the other hand, this is much less important for people who want to visit friends and family (i.e. holidays with a social focus) or for those seeking a cultural experience.

	Preference for attractions by desired holiday focus (column %)			
	Objectives of 2008 holiday			
	social	recreation / wellness	beach	cultural inputs
Art	5	5	3	8
Gastronomy	7	8	7	5
Entertainment	15	14	24	9
Cultural heritage	27	23	18	42
Festivals & other events	6	4	5	6
The environment	26	38	32	24
Others	10	8	9	4

The table below shows that cultural heritage was considered as a relatively less important attraction by those who are planning a domestic holiday in 2009 compared to those who plan to travel abroad, either to the EU or to non-EU countries (21% vs. 28%-29%; see analysis on planned travel destinations in section 6.3).

Preference for attractions by holiday destination (column %)

	Planned destination of the main holiday in 2009		
	domestic	elsewhere in the EU	in a non- EU country
Art	5	5	5
Gastronomy	7	6	6
Entertainment	18	14	14
Cultural heritage	21	28	29
Festivals & other events	5	5	5
The environment	33	31	29
Others	6	9	8

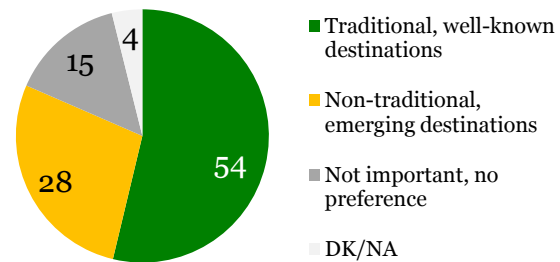
On the other hand, those who plan a vacation in their home country gave the most importance to the overall (attractiveness of the) environment of the holiday location (33% compared to 29% of those who plan to travel outside the EU).

5.4 Preferred holiday destinations

Most Europeans prefer to spend their holidays in **conventional tourist destinations** (or at least what they consider as ‘traditional’ or ‘well-known’ destinations, 54%). 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).

Approximately one in seven respondents (15%) had no preference about the type of destination, and 4% could not -or did not want to - reply. (The latter two groups were markedly less likely to have travelled in 2008 and were significantly less likely to plan a holiday in 2009 – see later analysis in section 6.3)

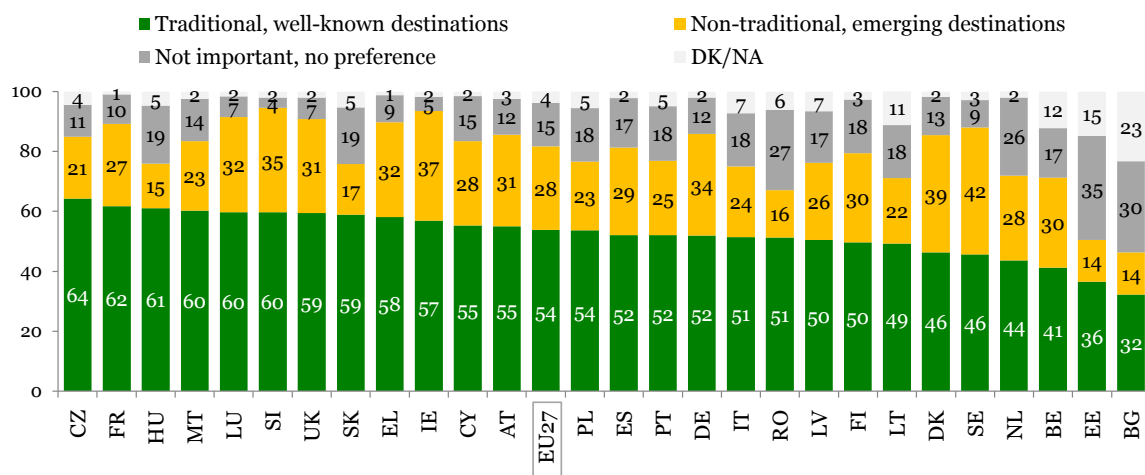
Preferred holiday destinations



Q17. What type of holiday destinations do you prefer?
%, Base: all respondents, EU27

In each of the EU Member States, those who preferred the classic tourist destinations outnumbered those who favoured visiting “alternative” locations. Those looking for emerging destinations were primarily in Sweden (42%), Denmark (39%) and Ireland (37%). On the other hand, a preference for traditional tourist destinations was the greatest in the Czech Republic (64%), France (62%) and Hungary (61%); in a number of other Member States (Malta, Luxembourg, Slovenia, the UK, Slovakia and Greece) a similar proportion, about 6 in 10 respondents, favoured traditional holiday locations. Those without a preference were in the majority in Bulgaria (53%, no preference or ‘don’t know’ combined) and accounted for half of Estonian citizens.

Preferred holiday destinations



Q17. What type of holiday destinations do you prefer?
%, Base: all respondents, by country

Traditional destinations dominated the choice in all broad socio-demographic segments, too (Annex Table 19b). However there are some clear tendencies, e.g. established destinations were preferred by the older age groups (e.g. 56% among those older than 54 vs. 47% of the 15-24 year-olds). On the other hand, emerging destinations were favoured by young Europeans (36% vs. 24% of the over 54s). Of those with the lowest level of education, one in five respondents (20%) would travel to alternative destinations vs. a third (35%) of the most educated ones. Metropolitan citizens preferred alternative locations (31% vs. 27% of the other groups) and self-employed people were also more attracted by

those destinations than people in other occupational categories.

Emerging destinations might, however, have to anticipate relatively more guest-nights than the overall 28% popularity in the adult population would suggest. Those who favoured such locations were more likely to indicate that they will take a holiday in 2009 (only 19% indicated they do not plan to travel this year vs. 27% of those who preferred conventional tourist destinations), and to state that they are planning more substantial holidays (either a long one with at least 13 nights away or a combination of shorter and longer trips): the combined percentage of these amounted to 43% among those looking for non-conventional destinations compared to 35% in the other group. Overall, 31% of those with current travel plans for 2009 generally liked emerging destinations, and 55% preferred the traditional ones; 13% had no preference.

5.5 Anticipated benefits of emerging destinations

Local culture, lifestyles and traditions were seen as the primary magnets of non-conventional destinations of tourism in Europe, but for budget travellers, cheaper prices might have a role, too.

Irrespective of people's preferences (see section 5.4) the survey asked for opinions about the main rationale for choosing an "alternative" tourist destination. A third of Europeans (33%) thought that the opportunity to explore local cultures and lifestyles would make them consider such a destination. Financial considerations play a role too: the combined proportion of those who mentioned better value for money (19%) and cheaper costs/lower prices (17%) even surpassed the importance of the cultural aspect (the two cost-related arguments amounted to 36% of respondents).

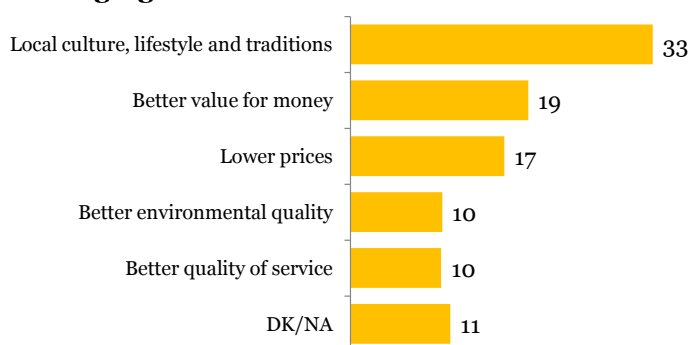
A better service quality in absolute terms and overall environmental concerns (e.g. a less polluted environment) would be the primary expectation of approximately 10% of respondents when considering non-traditional travel destinations.

Main expectation from an emerging destination (column %)

	Preferred holiday destinations	
	Traditional, well-known	Non-traditional
Better quality of service	11	8
Lower prices	20	11
Better value for money	21	17
Local culture, lifestyle and traditions	28	48
Better environmental quality	10	12

Expectations differ significantly between those who prefer such locations and those who would normally favour classic destinations. Those attracted to non-conventional destinations were the most likely to say they appreciate the *couleur locale* (48%) at these destinations. This would also be the main expectation for those who normally take a classic holiday (28%), but they also have higher hopes in other areas. Many would be attracted to less conventional holidays if these locations offered more affordable vacations (20%, vs. 11% in the group that typically attracted to "alternative" holidays) or at least better value for money (21% vs. 17%). In addition, towards the other end of the price vs. quality "curve", those who usually prefer traditional destinations might change their mind if the emerging destinations offered a better quality of service (11%).

The main expectations from a non-traditional, emerging destination

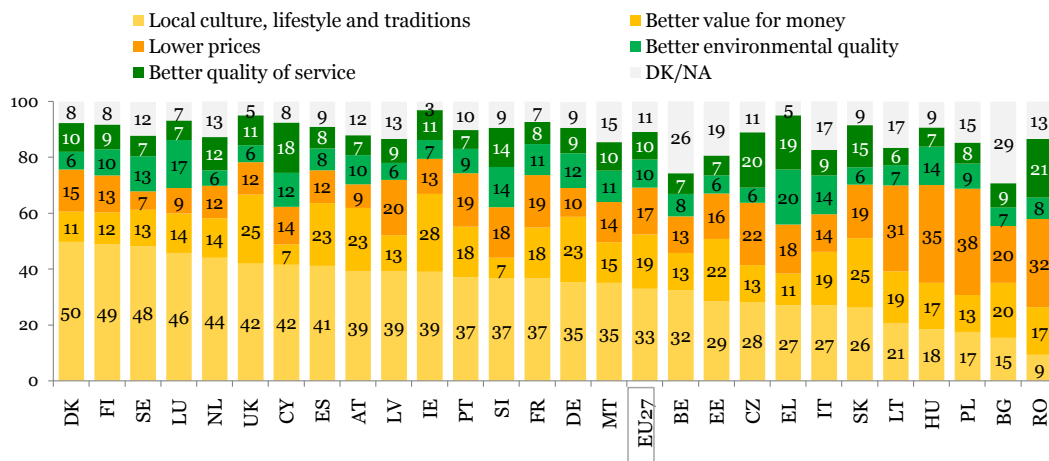


Q18. What would be your main expectation from a non-traditional, emerging destination?
%, Base: all respondents, EU27

Considering the destinations of holidays planned for 2009, respondents who indicated that they will spend their holiday domestically (see section 6.3) expect lower prices when considering emerging destinations (17% vs. 12%-13% of those taking a holiday abroad, in the EU or elsewhere). Local culture could attract more of those who plan international holidays: 41% who plan to travel elsewhere in the EU and 39% who will travel outside the Union indicated that their expectations would primarily be related to this aspect, while only 30% of those planning a holiday in their home country had a similar opinion.

A country-by-country look at the expectations about emerging destinations confirms that these vary widely. In a number of Member States (especially those where many people already prefer such destinations), local culture/lifestyle provides the main attraction (Denmark: 50%, Finland: 49%, Sweden: 48%); in several other countries, emerging destinations were expected to be more suited to budget travellers. The expectation of cheaper holidays at such destinations is predominant in Poland (38%), Hungary (35%), Romania (32%) and Lithuania (31%).

The main expectation from a non-traditional, emerging destination



Q18. What would be your main expectation from a non-traditional, emerging destination?
%, Base: all respondents, by country

An examination of the socio-demographic differences shows the relative importance of these two dimensions of emerging destinations (i.e. an interesting local culture vs. affordability, see Annex Table 20b). Affordability would be more attractive for young travellers (19%-20% for the under 40s vs. 16% for the other age groups) and manual workers (27% vs. 14% of employees). “Local colour”, in turn, would be the main “pull factor” of emerging destinations amongst the most educated and the metropolitan dwellers (e.g. 44% of the most educated vs. 23% of those with the lowest level of education). It is noteworthy that those aged between 40 and 54 were the respondents the most likely to expect to learn about local cultures/lifestyles from such emerging destinations (36% vs. 32% for the 15-24 year-olds).

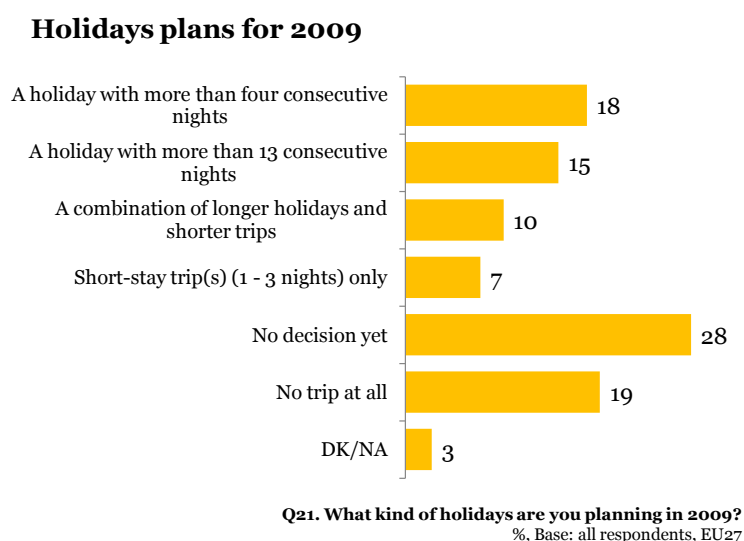
6. Vacation plans for 2009

In the final section, the survey asked respondents about their 2009 vacation plans. As the fieldwork started in February, this meant that only a part of respondents' holidays had already been booked. Given the current turbulent economic situation, these plans might change considerably with a result that less people might travel. This is particularly the case as a relatively large proportion of respondents claimed that they had not decided about their 2009 holiday plans.

6.1 Types of vacation

First of all, many Europeans were still undecided about their vacation plans for 2009 at the time of the fieldwork (28%).

About one in five (19%) said they were certain they would not take a vacation this year. Those who plan to go on holiday and already know what kind of vacation (50% in total) were most likely to indicate a vacation between 4 and 13 consecutive nights (18%). One or more short-stay trips (spending one to three nights at the destination) was the option chosen by 7% of respondents. Fifteen percent of Europeans said they planned to have a long vacation of at least two weeks or more (i.e. more than 13 consecutive nights).



Due to the large number of undecided respondents, it is not possible to directly compare the current plans with the actual trips made last year. At this time, the proportion of those who are certain that they will not take a holiday (19%) is below last year's proportion. In 2008, two-thirds (67%) travelled for private reasons, with 32% of the population who either travelled for purely business reasons or did not travel at all. The unknown factor is how many of the currently undecided respondents (28%) will opt for or against doing a holiday trip.

The respondents who were the most likely to say they will not travel in 2009 (those not working - 25%, the oldest age group - 27%, rural dwellers - 23%, and those with the lowest level of education - 36%; see Annex Table 24b.) were those who were less likely to travel in 2008 as well (see section 1.1). Women (21%) were also more likely than men (17%) to say they would not take a holiday.

If one compares the current plans for 2009 with the reported number of private trips in 2008 in a more segmented manner (and also with the addition - to the non-traveller segment - of those who said they could afford to take a holiday in 2009, see section 6.2), it is easy to pinpoint the most critical population segment: those who travelled in 2008, but are still undecided as to if they will take a holiday - or what kind it would be - in 2009. This is 17% of the European adult population and their eventual decision will have a tremendous impact on the tourism industry. (One might expect those who did not travel in 2008 and were still hesitating about their vacation plans in 2009 - this is 6% of the EU population - to be likely to stay at home in 2009 as well).

2009 plans compared to 2008 actual situation (total %)

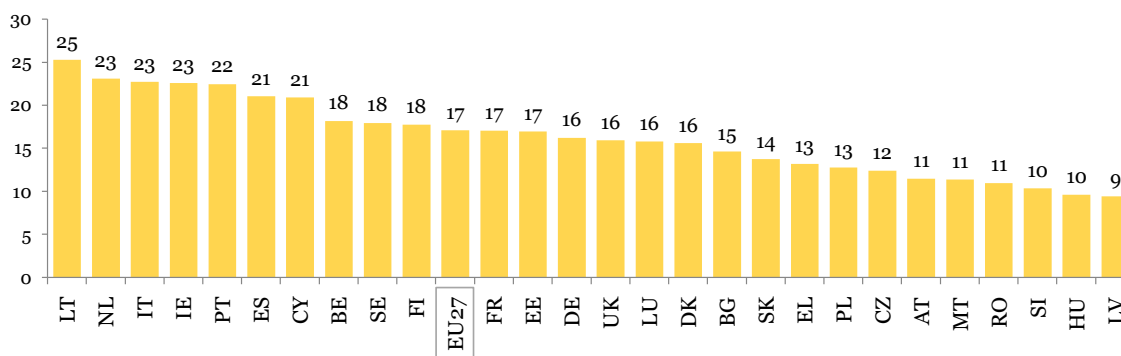
2009 travel plans (non-travellers adjusted*)	Any private travel in 2008			Total
	no private travel	some private travel	DK/NA	
will not travel	17	9	0	26
have some plans	7	40	1	48
Undecided	6	17	0	24
DK/NA	1	1	0	2
Total	32	67	1	100

* non-travellers estimated on the basis of the primary replies in the question that inquired about the type of holiday planned and answered that they do not plan to make a trip (Q21: 19%). Those who indicated that they think they will not be able to afford their trip most probably will not travel (in Q22 inquired about the 2009 travel budget) were added to this proportion (resulting in 26% non-travellers).

The most critical segment (“vulnerable” tourists, who travelled in 2008 and are still undecided about 2009) amounts to a relatively high percentage (of all residents) in some of the largest Member States in terms of tourist “output”. The survey showed that 23% of Dutch and Italian citizens, 21% of Spanish, 17% of French and 16% of German and British respondents belonged to this category.

"Vulnerable" tourists

(those who travelled for private reasons in 2008 but were still undecided about 2009 plans, %)



The proportion of those who travelled in 2008 but are still undecided about their 2009 plans were more frequently younger citizens (at the EU level, 21% of those aged 15-24), more likely to be economically active in white collar or entrepreneurial jobs (20% of the self-employed and a similar number of employees were also in this category) and more likely to be highly-educated (19%).

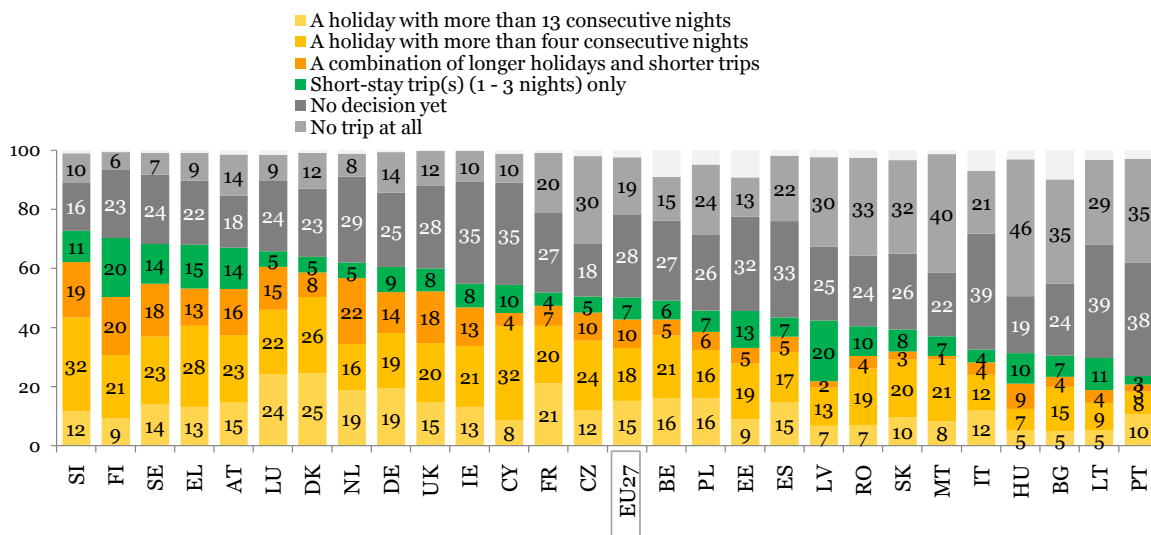
We emphasise that some or many of these respondents might be considering various destinations and types of holidays, and might take a holiday once a decision has been made. However, these people had not booked a holiday at the time of the survey and, therefore, might be more vulnerable to the increasing economic problems and cancel 2009 plans.

Going back to a more detailed analysis, Slovenes were the respondents most likely to have firm plans for 2009 vacations (74% of those interviewed), and about 7 in 10 respondents in Finland (70%), Sweden (69%) and Greece (69%) have current holiday plans, too. Interviewees from Luxembourg and Denmark were the most likely to plan a long (at least two weeks) vacation (24% and 25%, respectively).

Share of vulnerable tourists in the various socio-demographic segments (see definition above)

	% vulnerable
EU27	17
Male	18
Female	17
AGE: 15-24	21
AGE: 25-39	18
AGE: 40-54	18
AGE: 55+	14
Self-employed	20
Employees	20
Manual workers	16
Not working	15
metropolitan zone	19
other town/urban/centre	18
rural zone	15
EDUCATION: <15 years of age	12
EDUCATION: 16-20	17
EDUCATION: 20+	19

Holidays plans for 2009



Q21. What kind of holidays are you planning in 2009?

%, Base: all respondents, by country

Hungarian respondents were the most likely to state that they were not planning a holiday in 2009 (46%), and at least 3 in 10 respondents had a similar view in Latvia (30%), Slovakia (32%), Romania (33%), Portugal (35%), Bulgaria (35%) and Malta (40%). The proportion of those who were still undecided was the highest in Lithuania and Italy (39% in both countries), but it was almost as great in Portugal (38%), Ireland and Cyprus (both 35%).

A possible market contraction would be more likely to hit the traditional tourist destinations than new emerging destinations. One in five (19%) of those who generally prefer traditional destinations already

knew that they would not go on a vacation this year, the same figure was 13% among those who looked for emerging destinations.

2009 vacation planning (column %)

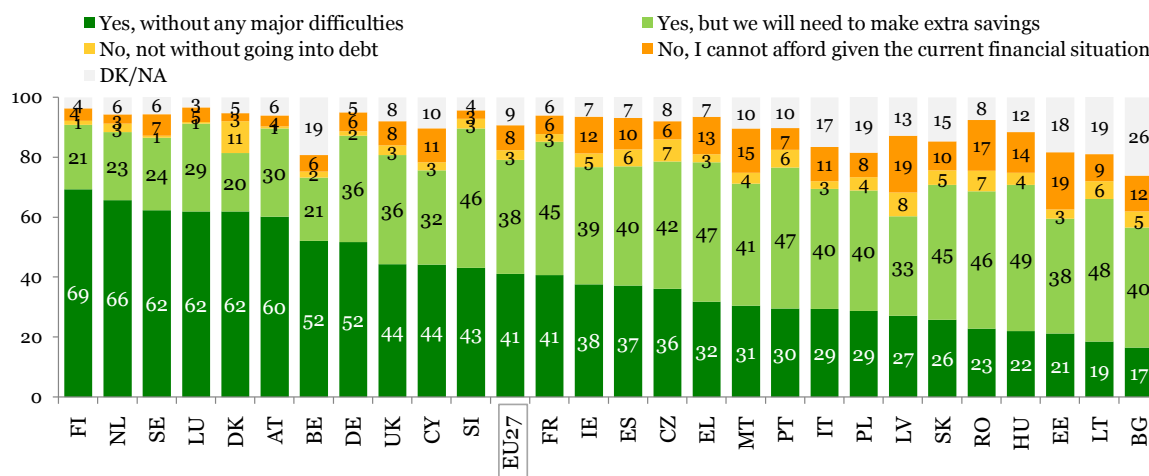
	Main objective of 2008 holiday			
	social	recreation / wellness	beach	cultural inputs
Holiday over 13 nights	21	20	23	20
Holiday over four nights	18	24	25	23
Comb. of longer and shorter trips	14	15	14	17
Short-stay trip(s) (1-3 nights) only	7	5	6	7
ANY CURRENT PLAN	59	64	67	67
No decision yet	30	29	26	27
No trip at all	9	6	5	5

Those who like beach holidays are the most committed to have a long holiday in 2009: 23% are planning a substantial vacation. This segment and those who look for cultural stimulation were the respondents the most likely to plan a holiday in 2009 (67% in both groups). Those who usually visit friends and family when they go to vacation were the least likely to have plans for 2009 and most likely to say that they would not travel this year (9%).

6.2 Financial constraints on holidays in 2009

About 4 in 10 Europeans who have plans to spend a holiday away from home in 2009 felt they have sufficient funds to do this (41%). Almost as many said that they would need to make extra savings in order to take their planned holidays. About 1 in 10 (11%), however, said they had serious financial problems that could impact holiday plans: 3% said they would not be able to go on holiday without going into debt and 8% felt that, despite having plans, they could not afford a holiday given the current financial situation. Finally, about 1 in 10 (9%) did not answer the question.

Having the necessary financial resources for the planned holidays



Q22. Will you have the necessary financial resources to be able to afford to take your planned holidays in 2009?
%, Base: who are planning a holiday, by country

There were only six Member States where a clear majority of holidaymakers with plans were confident that they could afford to take a holiday in 2009: Finland (69%), the Netherlands (66%),

Sweden, Luxembourg, Denmark (all 62%) and Austria (60%). About half (52%) of Belgian and German respondents also felt that they would have no problems in funding their 2009 vacation. In the other Member States, less than half of those who planned to travel said they would have no financial problems in regard to their holidays. Bulgaria (17%), Lithuania (19%), Estonia (21%), Hungary (22%) and Romania (23%) had the lowest share of such optimistic replies.

Latvia, Estonia and Romania were the Member States having the most respondents who felt they would have to cancel their plans to take a holiday in 2009 for financial reasons (19%, 19% and 17% respectively). Throughout the EU, relatively few people indicated that they would have to take a loan to finance their planned 2009 holiday; the highest figures were recorded in Denmark (11%), Latvia (8%), the Czech Republic and Romania (both 7%). Typically, this proportion remained below 5% in most Member States.

It was more common for citizens of some Member States to say they might need to make extra savings in order to be able to fulfil their 2009 holiday plans; at least a third of respondents in 20 Member States felt that this was the case – primarily in Hungary (49%), Lithuania (48%), Romania and Slovenia (both 46%).

Respondents who planned more substantial holidays (for more than two weeks or a combination of longer and shorter trips) are much more confident about being able to finance their 2009 holidays: 54% felt there would be no problems with financing the trip in comparison to 45% of those planning shorter holidays. Those who generally preferred to visit emerging destinations were slightly more optimistic compared to those who like to travel to classic tourist destinations (44% vs. 41%). Those who normally visit family and friends and were still planning a vacation for 2009 (as we saw, this group was the most likely to give up their travel plans, see section 6.1) were the least optimistic about financing: 8% felt that they might not have sufficient funds and only 41% foresaw no difficulties. Such optimism is higher among respondents who like beach holidays (44%), those who place an emphasis on rest and recreation (48%) and especially those who usually plan holidays with an emphasis on culture (53%).

If we examine the planned destinations for respondents' main 2009 holiday (see next section for details), we see that domestic holidaymakers (those staying in their own country) were the most concerned about finances: only 39% felt they would have sufficient funds and 9% were feeling that they would not be able to afford their planned trip. The interviewees with the least amount of concern were those who planned to travel abroad within the EU (49% foresaw no financial problems).

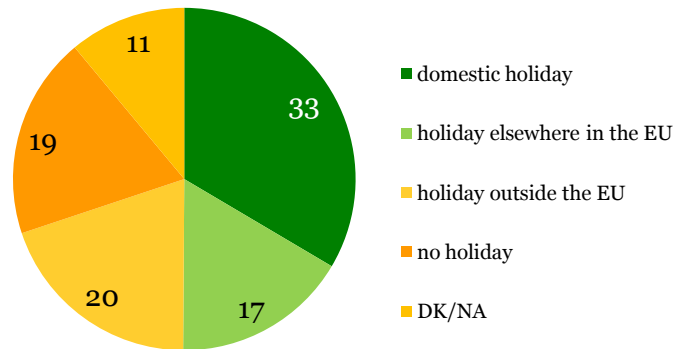
Among those with 2009 holiday plans, the oldest respondents (the over 54 year-olds, who were actually the least likely to have such plans – see section 6.1) were the most confident of having sufficient funds to make the trip. (see annex Table 25b.). In sharp contrast, only 35% of the youngest respondents (15-24 year-olds) were so optimistic. Women were markedly less likely to feel that they could take their planned 2009 holiday without difficulties (37% versus 46% of men). Those with the lowest level – or a medium level - of education (12%, 10%), those not working (10%) and manual workers (13%) as well as rural citizens (10%) were most likely to feel they would cancel their current vacation plans for financial reasons.

6.3 Planned destinations

A third of EU citizens have planned a holiday in their home country for 2009 (33%). About one in six (17%) said they planned to take a holiday within the EU and 20% indicated that a non-EU country was their main destination in 2009.

Planned destination of the main holiday in 2009

Many of the most important tourist destinations attract a large number of domestic visitors. Greece, for example, has the vast majority of its residents spending a vacation within its own borders (75%), but a significant number of *all respondents* in Spain (54%), Italy (49%) and Poland (45%) are aiming to holiday “at home”.

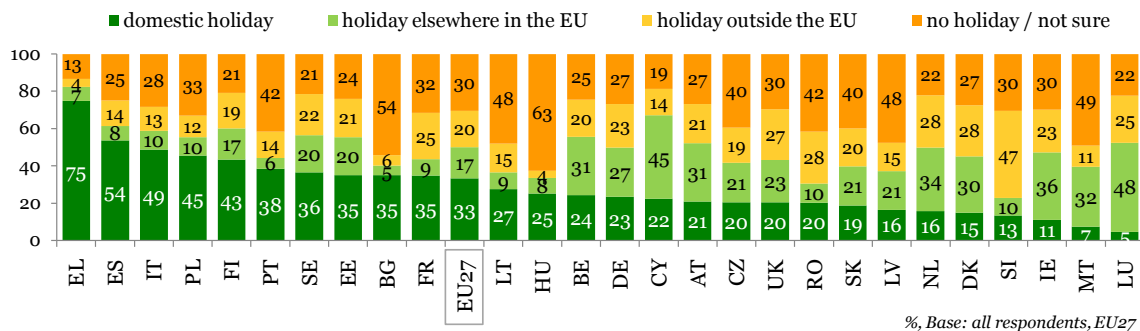


Q23. Where do you plan to spend your main holiday in 2009?
%, Base: all respondents, EU27

The least likely to do this are those from some of the smaller Member States (e.g. Luxembourg, Malta and Slovenia) and Ireland: most respondents in those countries planned to visit a destination from the 26 other EU Member States. This is not the case in Slovenia, where many tourists picked destinations in other countries of the former Yugoslavia (most prominently in Croatia), so their dominant choice was a non-EU country.

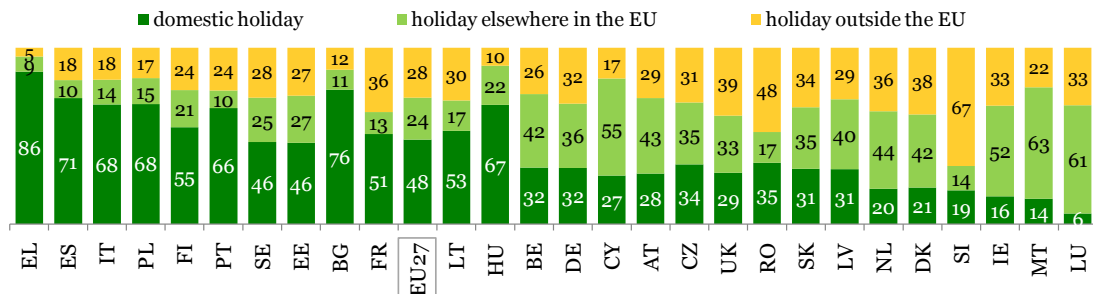
The least likely to do this are those from some of the smaller Member States (e.g. Luxembourg, Malta and Slovenia) and Ireland: most respondents in those countries planned to visit a destination from the 26 other EU Member States. This is not the case in Slovenia, where many tourists picked destinations in other countries of the former Yugoslavia (most prominently in Croatia), so their dominant choice was a non-EU country.

Planned destination of the main holiday in 2009...



%, Base: all respondents, EU27

... and focusing on those who will take a holiday in 2009



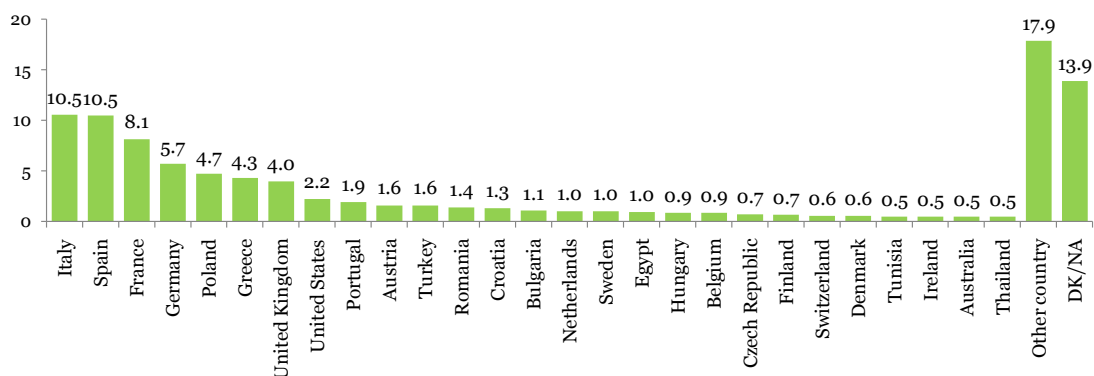
Q23. Where do you plan to spend your main holiday in 2009?
%, Base: Those who will take a holiday in 2009, without DK/NA, EU27

The second chart above provides the same results focusing only on those who have planned a holiday in 2009 and have already chosen a destination. This shows that respondents in about half of the Member States are not planning to take a holiday in their own country (about a third or less of respondents), while in the other half of the Member States, respondents plan to stay at home.

The two charts that follow illustrate that Spain, Italy and France are still the most popular holiday destinations for Europeans. As they did in 2008, most respondents plan to spend their holidays in these countries, regardless to whether they are residents of those countries or of another EU country. The upper chart shows that 11% of all Europeans who plan a holiday – even if this would be in their *country of residence* - think of spending it in Italy or Spain and 8% plan to go to France. The lower chart focuses on those respondents who plan to travel to a *foreign country*, with 5-8% choosing those same three countries as a holiday destination in 2009.

When comparing the results of the countries visited in 2008 (see chapter 3) with 2009 plans, we see that the travel preferences of Europeans are remaining quite stable. In 2009, Germany, Poland, Greece and the UK will be the most popular countries after Spain, Italy and France – as in 2008. Moreover, the United States, Turkey and Croatia remain the most cited non-European travel destinations, with Romania figuring a bit higher in the ranking in 2009.

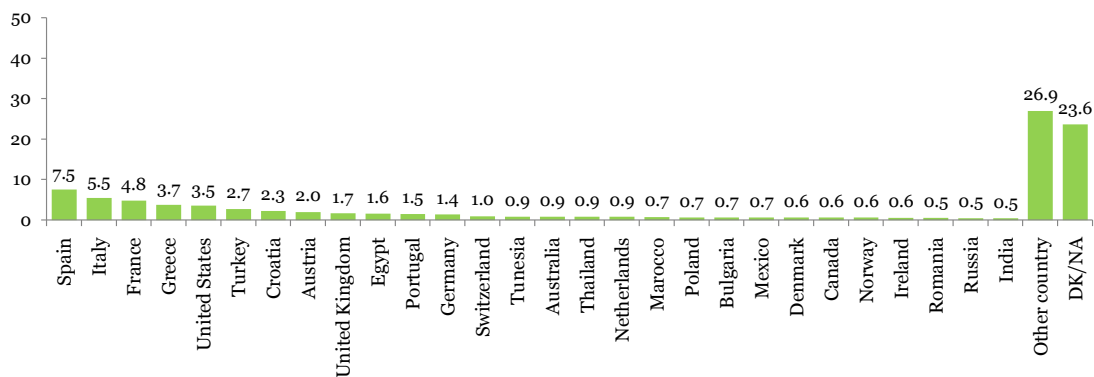
Planned destination of the main holiday in 2009 - including domestic holidays



Q23. Where do you plan to spend your main holiday in 2009?

%, Base: who are planning a holiday, EU27
Countries mentioned at least 0.5% shown

Planned destination of the main holiday in 2009 - excluding domestic holidays



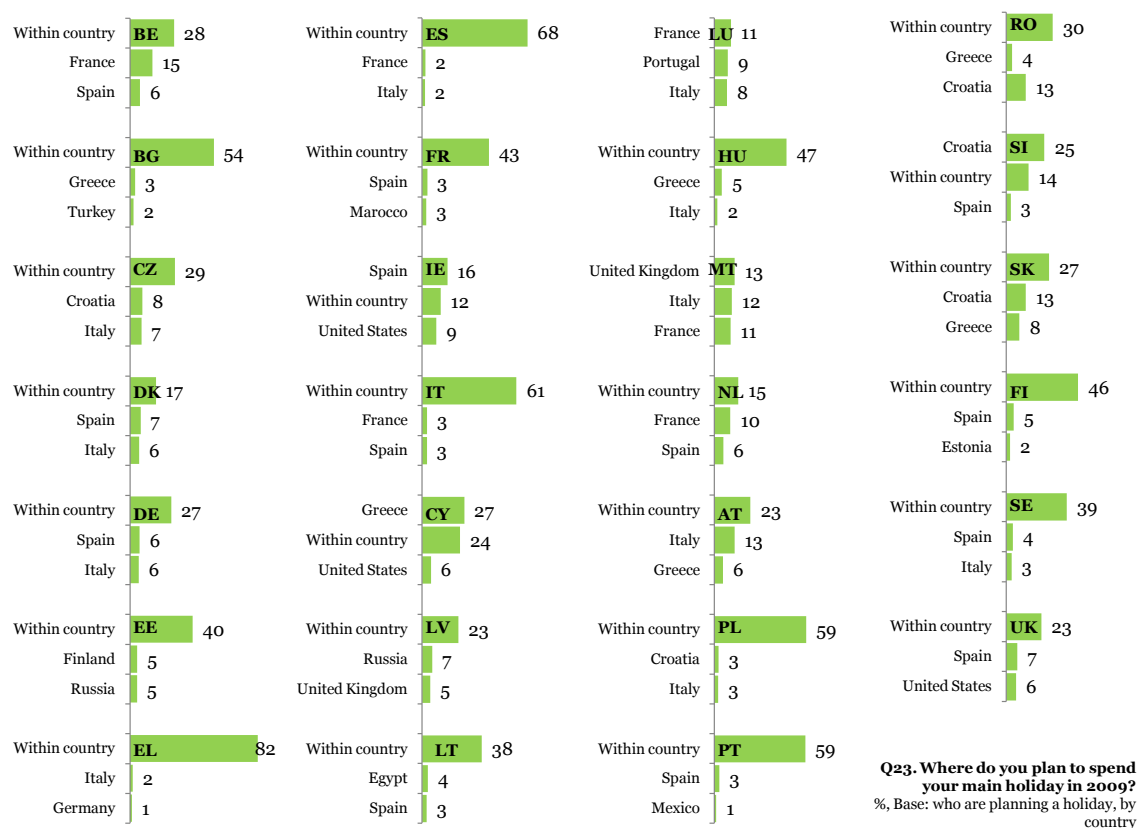
Q23. Where do you plan to spend your main holiday in 2009?

%, Base: who are planning a holiday, EU27
Countries mentioned at least 0,5% shown

If we look at destination countries individually, then in almost each Member State it is the respondent's home country that attracts most tourism. As the chart below shows, a domestic holiday was chosen the most frequently in 22 Member States.

Exceptions were Luxembourg (where holidaymakers have a diverse focus and France was the top destination with only 11% of replies), Slovenia (where 25% plan to travel to Croatia), Ireland (with Spain as the top choice – 16%), Malta (where most tourists plan to visit the UK) and Cyprus (where most people plan to visit Greece).

Planned destination of the main holiday in 2009 (TOP3 destination)



Domestic vacations are generally preferred by the less affluent segments of the EU population (see Annex Table 26b): those not working (45% compared to an EU average of 41%), those with the lowest level of education (53%) and those aged over 54 (46%).

The least likely respondents to spend their vacation domestically are those taking a holiday with a cultural emphasis (36%) while half (49%) of those whose main concern is recreation could find domestic locations that satisfy their needs. Those preferring traditional holiday destinations were also more likely to indicate that they have domestic vacation plans for 2009 (52% versus 40% of those who look for alternative, emerging destinations). In the latter group more people plan to have their holiday outside the EU (34%) than in another EU Member State (26%).

The focus of holidays seems to be shifting in a more domestic direction: in 2008, 43% of respondents took a holiday in their own country, this compares to 48% who will stay at home in 2009 (of those who already know their 2009 destination⁵). Significantly fewer travellers have current plans to travel to other EU countries in 2009 compared to 2008 (24% and 31%, respectively).

Location of main holidays: shifts from 2008 (EU27 level, column %)

	2008 (without DK/NA)	2009 (without DK/NA)
Resident country	43	48
EU27	31	24
Other non-domestic	26	28

Non-EU destinations, however, have gained some popularity, probably due to the increasingly favourable exchange rates for euro area travellers into many of these destinations (28% -- of those who have definite travel plans – plan to visit a non-EU country in 2009 compared to 26% in 2008).

⁵ Please note that this analysis does not include those who did not specify a 2009 destination, i.e. those who identified a destination were considered to be 100%. The frequencies for 2008 were calculated on the same basis, excluding “don’t know / no answer” responses (< 1%).

Flash EB Series #258

Survey on the attitudes
of Europeans
towards tourism

Annex
Tables and
Survey
Details

THE GALLUP ORGANIZATION

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Table 1a. Number of short business or private trips in 2008 – *by country*

QUESTION: Q1. During 2008, 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
 EU27	27127	27.7	16.2	13.9	10.4	12.1	10.3	8	1.5
COUNTRY									
 Belgium	1002	26	22.5	16.6	14.7	10.7	4.2	2.9	2.4
 Bulgaria	1002	42.1	14	8	6.4	7.5	7.7	10.7	3.7
 Czech Rep.	1001	35.5	15.2	16.3	6.1	5.8	10.7	8.2	2.3
 Denmark	1004	23.1	15.5	17.5	13.4	14.5	9.8	5.8	0.6
 Germany	2000	21.6	17.4	16	13.6	13.9	10.1	6	1.4
 Estonia	512	26.9	19.4	17.1	11.3	10.7	7.5	3.5	3.6
 Greece	1008	18	14.7	13.1	10.7	14.2	18.4	10	0.9
 Spain	1506	26.2	19.2	16.3	10.6	11.4	8.1	7.4	0.6
 France	1505	24.1	16.3	14.4	11.3	12.3	11.9	9.3	0.6
 Ireland	1000	14.2	12.1	16.1	14.1	18.1	13.9	9.9	1.6
 Italy	1507	32.7	17.6	14.6	7.6	9.6	9.6	7.1	1.2
 Cyprus	501	23.4	28.4	16.2	12.5	11.4	5.5	2.6	0
 Latvia	503	44.2	20.2	10.5	8.3	6.1	6.1	4.5	0.1
 Lithuania	503	30.7	14.1	9.5	7	11.8	17.8	8.1	1
 Luxembourg	503	15.8	13.8	15.5	15.9	18	12	8.5	0.4
 Hungary	1013	54.3	15.4	8	4.2	5.8	6.8	5.2	0.3
 Malta	504	46.1	26.2	13.1	5.6	4.1	3	1.4	0.4
 Netherlands	1000	14.7	20.4	18.1	13.9	15.8	8.8	7.4	0.9
 Austria	1002	18.2	17.9	15.8	13.4	16.5	11.8	5.5	0.8
 Poland	1515	38.2	15.6	9.9	7.2	9.7	8.2	9.1	2.1
 Portugal	1001	46.6	21.1	8.8	6.5	4.9	5.4	5.1	1.6
 Romania	1008	46.3	11.2	9.7	7.7	7.7	8.6	6.1	2.7
 Slovenia	503	20	12.7	13.6	12.2	17.5	14	9.5	0.5
 Slovakia	1014	37.2	13.3	9.7	7.3	8.3	8.2	11.5	4.5
 Finland	1009	11.5	8.6	11.2	10.9	18.2	17.7	20.6	1.4
 Sweden	1000	10.5	9.5	11.9	9.5	21.1	19	17.2	1.3
 United Kingdom	1501	22.1	12.8	13.7	11	16	12.5	9.7	2.2

Table 1b. Number of short business or private trips in 2008 – *by segment*

QUESTION: Q1. During 2008, 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
EU27	27127	27.7	16.2	13.9	10.4	12.1	10.3	8	1.5
 SEX									
Male	13115	26.1	13.6	13.2	10.5	12.8	11.4	10.8	1.7
Female	14012	29.2	18.7	14.7	10.3	11.4	9.2	5.3	1.2
 AGE									
15 - 24	4064	21.7	18.3	14.1	12.7	13.6	10.3	7.2	2.2
25 - 39	6202	22.5	16.8	15.2	9.8	12.6	12.3	9.9	1
40 - 54	7245	26.9	16.1	14	10	12.9	10.1	8.5	1.4
55 +	9323	34.3	15.1	13	10.1	10.6	9.1	6.5	1.4
 EDUCATION (end of)									
Until 15 years of age	4433	46.8	17.4	13.2	7.2	5.9	4.8	3.4	1.4
16 - 20	11798	29.4	17.4	14.1	9.8	11.1	9.4	7.3	1.4
20 +	7410	14.7	12.6	14.6	12	17.2	15.2	12.5	1.2
Still in education	2710	19.8	19.8	13.7	14.6	13.9	10.5	6.1	1.6
 URBANISATION									
Metropolitan	3352	21.9	15.8	13.5	9.8	14.1	13.2	10.5	1.2
Urban	13447	26.5	16.2	13.6	11.2	12.3	10.6	8	1.5
Rural	10055	31.1	16.4	14.6	9.5	11.3	8.9	7	1.3
 OCCUPATION									
Self-employed	2568	17.5	14.2	13	9.9	14.1	15	14.7	1.7
Employee	8474	16.6	15	14.9	12.3	15.3	13.2	11.3	1.3
Manual worker	2247	37.9	17.8	14	6.7	8.4	7.3	6.5	1.6
Not working	13601	34.9	17.1	13.6	9.8	10.4	8	4.8	1.4

Table 2a. Number of short private trips in 2008 – *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





























	Total N	% None	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
 EU27	19619	31.6	22.5	16.5	8.3	8.2	6.9	4.2	1.9
COUNTRY									
 Belgium	742	38.3	24.2	16.5	9.6	3.2	2.2	1.7	4.4
 Bulgaria	581	22.2	19	14	9.6	10.4	10.3	8.5	6.1
 Czech Rep.	646	29.3	23.1	15	4.6	8.6	8.4	7.1	4
 Denmark	772	35	23.9	16.7	7.9	8.5	3.9	3	1.2
 Germany	1567	37.7	23.2	16.1	8	6.9	4.8	1.7	1.5
 Estonia	375	17.4	34.2	20.4	8.6	6.5	4.9	3	5.1
 Greece	826	24	21.9	15.1	12.7	11.4	9.2	5	0.8
 Spain	1111	19.6	32.6	22.5	8.7	8.2	5	2.9	0.6
 France	1143	43.6	14.2	13.5	7.7	7.6	6.9	5.5	1
 Ireland	858	24	20	19.3	11.9	12	6.4	4.8	1.5
 Italy	1014	28.8	23	19.7	7.3	8.1	7.1	3.3	2.7
 Cyprus	384	29	38	16.4	7.9	4.9	2.3	1.3	0.2
 Latvia	280	25.3	33	15.4	12.6	4.9	4.7	3.4	0.7
 Lithuania	348	19	27	13.1	8.5	8.6	17.4	3.9	2.4
 Luxembourg	424	37.5	20.4	16.6	9.9	7.9	4	2.3	1.3
 Hungary	463	31.9	27.4	13.7	4.3	7.8	9.6	2.8	2.5
 Malta	272	27.5	40.5	19.8	6.2	4.6	0.9	0.3	0.2
 Netherlands	853	31.5	27.8	18.7	7.7	7.2	3.6	2.4	1.1
 Austria	820	28.4	25.8	19.7	10.8	8	5.3	1.4	0.5
 Poland	937	32.3	20	13.1	7.1	8.8	7.2	6.7	4.7
 Portugal	535	26.3	38.2	12	5.7	5.4	4.3	5.7	2.5
 Romania	541	30.1	21	15.2	7.1	8.6	8.3	6.9	2.8
 Slovenia	402	32.6	14	18	11.4	11.6	7.7	4.4	0.3
 Slovakia	636	27	20.5	14	10.1	8.7	9.5	7	3.2
 Finland	893	13.1	15.8	16.3	11.6	15.2	14.5	11.8	1.6
 Sweden	895	19.3	16.8	17.5	11.2	14.8	13.3	5.6	1.5
 United Kingdom	1169	30.4	20.8	15.1	8.9	8.7	9.3	5.2	1.6

Table 2b. Number of short private trips in 2008 – *by segment*

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






	Total N	% None	% 1	% 2	% 3	% 4-5	% 6- 10	% 10+	% DK/NA
EU27	19619	31.6	22.5	16.5	8.3	8.2	6.9	4.2	1.9
 SEX									
Male	9695	29.9	19.9	17	9.2	8.8	7.8	5.3	2.1
Female	9924	33.2	25.1	16	7.3	7.6	6	3	1.8
 AGE									
15 - 24	3184	28.6	25.7	16	7.9	7.4	7	4.5	2.8
25 - 39	4808	28.9	22.3	16.8	8.6	8.8	8.6	4.8	1.4
40 - 54	5296	30.6	23.3	18.4	8.4	8.2	5.7	3.9	1.5
55 +	6127	36	20.6	15	8.1	8.1	6.4	3.6	2.1
 EDUCATION (end of)									
Until 15 years of age	2360	40	25	14.4	6.4	4.7	4.1	3.1	2.4
16 - 20	8329	33.4	22.7	16	8.1	7.9	6.4	3.8	1.7
20 +	6322	27.3	19.7	18	9.3	10.5	8.5	5.2	1.6
Still in education	2173	28.4	27.6	17	8	6.7	6.8	3.5	2
 URBANISATION									
Metropolitan	2617	30.5	20	17	8.6	9.4	7.8	5.1	1.6
Urban	9880	31.2	22.1	16.1	8.6	8.3	7.4	4.3	2
Rural	6928	32.7	24.1	16.7	7.5	7.6	5.8	3.6	1.8
 OCCUPATION									
Self-employed	2120	27.2	19.6	16	9.6	10.9	8.7	6	2
Employee	7063	28.1	22.2	17.8	9.3	8.6	7.5	5.2	1.4
Manual worker	1397	37	22.7	14.1	7.1	7.5	5.2	4.2	2.1
Not working	8860	34.6	23.6	16	7.1	7.3	6.3	2.9	2.1

Table 2c. Number of short private trips in 2008 of those who made at least one short private trip in 2008 – *by segment*

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 2008






	Total N	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
EU27	13420	32.9	24.1	12.1	12.0	10.1	6.1	2.8
 SEX								
Male	6792	28.4	24.2	13.1	12.5	11.2	7.6	2.9
Female	6628	37.5	24.0	11.0	11.3	8.9	4.5	2.7
 AGE								
15 - 24	2273	36.1	22.4	11.1	10.3	9.8	6.4	3.9
25 - 39	3419	31.3	23.6	12.1	12.4	12.1	6.7	1.9
40 - 54	3676	33.6	26.5	12.1	11.9	8.2	5.5	2.2
55 +	3921	32.2	23.4	12.7	12.6	10.0	5.7	3.3
 EDUCATION (end of)								
Until 15 years of age	1416	41.7	23.9	10.7	7.8	6.8	5.2	4.0
16 - 20	5543	34.1	24.1	12.2	11.8	9.6	5.6	2.6
20 +	4599	27.1	24.7	12.7	14.5	11.7	7.1	2.2
Still in education	1557	38.5	23.7	11.1	9.4	9.6	4.9	2.8
 URBANISATION								
Metropolitan	1819	28.8	24.4	12.4	13.5	11.2	7.4	2.4
Urban	6802	32.2	23.4	12.5	12.0	10.7	6.3	2.9
Rural	4660	35.9	24.9	11.2	11.3	8.6	5.4	2.7
 OCCUPATION								
Self-employed	1542	26.9	22.0	13.2	15.0	11.9	8.2	2.7
Employee	5083	30.9	24.7	12.9	12.0	10.4	7.3	1.9
Manual worker	880	36.0	22.4	11.3	11.9	8.3	6.7	3.4
Not working	5795	36.1	24.5	10.9	11.1	9.6	4.5	3.3

Table 3a. Number of short trips compared to the pervious year – *by country*

QUESTION: Q3. Was this more, less or the same number of short trips that you took in 2007?

Base : those who travelled for business or private purposes





























	Total N	% Less	% Same	% More than in the previous year (2007)	% DK/NA
 EU27	19619	23.5	51.1	21.9	3.5
COUNTRY					
 Belgium	742	18.8	56.5	18.9	5.7
 Bulgaria	581	21	51.9	19.1	8
 Czech Rep.	646	18.6	56.8	19.7	4.9
 Denmark	772	18.1	58.2	21.8	1.9
 Germany	1567	26.6	47.6	21.5	4.4
 Estonia	375	34.9	38.9	23.3	3
 Greece	826	30.1	43.3	23.2	3.4
 Spain	1111	23.6	54	20.6	1.7
 France	1143	21.6	58.6	17	2.8
 Ireland	858	23.9	51.3	24	0.8
 Italy	1014	27.8	48.2	19.8	4.2
 Cyprus	384	30.7	48.6	19.4	1.2
 Latvia	280	15.2	48.8	32.8	3.2
 Lithuania	348	31.2	38.5	24	6.4
 Luxembourg	424	23.7	51.7	21.8	2.8
 Hungary	463	21.9	54	22.3	1.9
 Malta	272	20.6	42.1	35.5	1.8
 Netherlands	853	21.9	55.4	19.9	2.8
 Austria	820	20.3	53.5	23.8	2.4
 Poland	937	20.4	46.9	28	4.7
 Portugal	535	24.2	48	24.2	3.6
 Romania	541	21.6	40	33.7	4.6
 Slovenia	402	27.4	45	25.8	1.9
 Slovakia	636	22.8	45.7	28.4	3.1
 Finland	893	20.9	59.9	17.7	1.5
 Sweden	895	22.4	51.4	22.7	3.6
 United Kingdom	1169	20.9	52.5	23.8	2.8

Table 3b. Number of short trips compared to the pervious year – *by segment*

QUESTION: Q3. Was this more, less or the same number of short trips that you took in 2007?

Base : those who travelled for business or private purposes






	Total N	% Less	% Same	% More than in the previous year (2007)	% DK/NA
EU27	19619	23.5	51.1	21.9	3.5
 SEX					
Male	9695	22.9	51.1	22.7	3.3
Female	9924	24.1	51.1	21.1	3.7
 AGE					
15 - 24	3184	27.5	37.8	31.7	3
25 - 39	4808	24.8	47.4	24.7	3.1
40 - 54	5296	23.1	53.7	20	3.2
55 +	6127	20.9	58.5	16.4	4.2
 EDUCATION (end of)					
Until 15 years of age	2360	24.2	50.9	19.6	5.3
16 - 20	8329	23.4	51.5	21.6	3.5
20 +	6322	22.1	54.5	20.4	3
Still in education	2173	26.7	40.1	31.1	2.1
 URBANISATION					
Metropolitan	2617	22.2	52.4	22.7	2.7
Urban	9880	23.7	50.6	22.1	3.5
Rural	6928	23.7	51.2	21.3	3.8
 OCCUPATION					
Self-employed	2120	22.7	51.6	20.9	4.8
Employee	7063	22.5	52.2	22.5	2.8
Manual worker	1397	26.4	47.7	22.1	3.7
Not working	8860	24	50.6	21.6	3.7

Table 4a. Making a trip in 2007 – *by country*

QUESTION: Q3A. Did you make a trip in 2007 where you were away from home for a minimum of one night?

Base : those who did not travel at all for business or private purposes





























	Total N	% Yes	% No	% DK/don't remember
 EU27	7508	31.5	65.4	3
COUNTRY				
 Belgium	260	27.2	62	10.9
 Bulgaria	421	16.4	72.5	11.1
 Czech Rep.	355	20.4	78.2	1.4
 Denmark	232	45.8	51.2	3
 Germany	433	34.2	64	1.8
 Estonia	137	25.6	61.1	13.2
 Greece	182	49.8	47.8	2.4
 Spain	395	38.2	59	2.8
 France	362	31.3	67.8	0.9
 Ireland	142	43.1	56.2	0.6
 Italy	493	33.5	61.2	5.3
 Cyprus	117	43	54.9	2
 Latvia	223	27.4	67.4	5.2
 Lithuania	155	32.8	61.9	5.3
 Luxembourg	79	42.3	57	0.7
 Hungary	550	17.9	80.2	2
 Malta	232	28.2	68.9	2.9
 Netherlands	147	40.7	58.8	0.5
 Austria	182	39.4	59.9	0.7
 Poland	578	23.8	73	3.2
 Portugal	466	17.3	80.4	2.3
 Romania	467	28	69.1	2.9
 Slovenia	101	41.5	56.9	1.6
 Slovakia	378	15.4	81.5	3
 Finland	116	42	53.9	4.1
 Sweden	105	60.2	34.5	5.2
 United Kingdom	332	42	56.4	1.6

Table 4b. Making a trip in 2007 – *by segment*

QUESTION: Q3A. Did you make a trip in 2007 where you were away from home for a minimum of one night?

Base : those who did not travel at all for business or private purposes






	Total N	% Yes	% No	% DK/don't remember
EU27	7508	31.5	65.4	3
 SEX				
Male	3420	33.8	63.9	2.3
Female	4087	29.6	66.7	3.7
 AGE				
15 - 24	880	40.1	56.1	3.9
25 - 39	1394	40.8	55.8	3.5
40 - 54	1949	33	64.7	2.3
55 +	3196	24.7	72.5	2.8
 EDUCATION (end of)				
Until 15 years of age	2073	23.3	73.1	3.5
16 - 20	3469	32.8	64.4	2.7
20 +	1088	43.1	54.5	2.5
Still in education	537	39	57	4.1
 URBANISATION				
Metropolitan	735	34	63.3	2.7
Urban	3566	33.7	63.3	2.9
Rural	3128	28.9	67.9	3.2
 OCCUPATION				
Self-employed	449	31	67.5	1.5
Employee	1411	41.7	56.2	2.1
Manual worker	851	33.5	64.3	2.2
Not working	4741	28.4	68	3.6

Table 5a. Number of holidays in 2008 – *by country*

QUESTION: Q4. How many times did you go on holiday in 2008, 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





























	Total N	% None	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
 EU27	19619	18.5	36.8	22.4	10	6.9	3.1	1.3	0.9
COUNTRY									
 Belgium	742	11.2	37.3	23.7	13.6	5.4	2.1	0.7	6
 Bulgaria	581	36.9	39.3	12.6	3.8	3.5	1.7	0.9	1.2
 Czech Rep.	646	14.4	44.9	28.1	5.2	3.1	2.1	1.2	1.1
 Denmark	772	15.6	32.4	25.2	9.4	10.6	3.9	1.2	1.7
 Germany	1567	16.7	34.4	26.2	11.4	8	2	0.9	0.5
 Estonia	375	22.7	46.7	16.3	5.3	2.9	2.8	0.4	3.1
 Greece	826	18.4	37.2	18.5	10.1	8	4.9	2.6	0.2
 Spain	1111	14.1	42.4	24.1	9.3	5.4	2.8	1.5	0.4
 France	1143	19.9	33.6	20.8	11.9	6.8	4.4	1.4	1.2
 Ireland	858	12.9	32.4	25.8	12.9	9.5	4.8	0.9	0.8
 Italy	1014	20.9	39.9	21.4	6.4	6	2.8	1.3	1.2
 Cyprus	384	7.8	41	25.2	11.4	8.3	3.4	1.5	1.5
 Latvia	280	32.1	33.7	15	9.4	4	4.5	0.9	0.4
 Lithuania	348	27	38.8	22.3	6.2	3.3	1.1	0.6	0.6
 Luxembourg	424	10.2	27.6	28.9	17	9	6.3	0.7	0.3
 Hungary	463	33	43.4	13	2.7	3.6	3.2	0.8	0.2
 Malta	272	15	46.6	22.2	10.4	3.2	0.8	0.4	1.6
 Netherlands	853	8.3	40.4	26.4	14.4	8.2	1.5	0.4	0.3
 Austria	820	17.7	35.4	24.2	12.4	6.5	3	0.4	0.4
 Poland	937	22.6	46.5	14.9	5.9	5.2	2.4	1.1	1.5
 Portugal	535	18.7	45.4	18.5	6.2	6.1	3.4	1.6	0.1
 Romania	541	28	31.6	19.4	6.4	6.4	5.6	1.5	1
 Slovenia	402	11.9	33.1	31.9	9.7	7.8	5.1	0.4	0.1
 Slovakia	636	34.7	41.5	14.3	2.4	3.4	1.4	1.2	1
 Finland	893	22.3	27.7	17.7	9	11.9	5.9	4.2	1.3
 Sweden	895	18.2	28.6	21.8	12.4	10.4	5.1	2.4	1
 United Kingdom	1169	16.7	31.1	24.1	13.4	8.5	3.5	1.8	0.7

Table 5b. Number of holidays in 2008 – *by segment*

QUESTION: Q4. How many times did you go on holiday in 2008, 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






	Total N	% None	% 1	% 2	% 3	% 4-5	% 6- 10	% 10+	% DK/NA
EU27	19619	18.5	36.8	22.4	10	6.9	3.1	1.3	0.9
 SEX									
Male	9695	19.3	34.4	23.1	10.2	7.2	3.3	1.5	1
Female	9924	17.8	39.1	21.7	9.8	6.6	3	1.1	0.8
 AGE									
15 - 24	3184	16.7	37.4	22.3	11.2	7.3	2.4	1.1	1.5
25 - 39	4808	19.6	40	22.2	8.6	5.1	2.9	0.9	0.5
40 - 54	5296	18.1	38.8	23.6	9.7	6.2	2.2	0.8	0.6
55 +	6127	19	32.4	21.4	10.8	8.8	4.4	2.1	1.1
 EDUCATION (end of)									
Until 15 years of age	2360	24.6	38.4	19.5	7.1	6.2	1.7	1.4	1.1
16 - 20	8329	19.8	39.2	21.4	8.9	6.1	3.1	0.8	0.8
20 +	6322	15.1	33.5	24.3	12.5	8.2	4	1.7	0.8
Still in education	2173	16.3	36.3	23.9	10.8	7.6	2.5	1.4	1.2
 URBANISATION									
Metropolitan	2617	14.6	36.2	22.7	10.5	9.7	4.1	1.6	0.6
Urban	9880	18	36.4	22.5	11	6.6	3.3	1.4	0.8
Rural	6928	20.8	37.7	22.1	8.4	6.4	2.5	1.1	1
 OCCUPATION									
Self-employed	2120	19.1	33.9	22.4	11	7.3	3.8	1.7	0.7
Employee	7063	14.7	37.8	25.4	11.2	6.5	2.7	1	0.7
Manual worker	1397	25.8	43.6	16.8	5.8	2.4	3.7	0.6	1.3
Not working	8860	20.4	35.8	20.6	9.5	7.9	3.2	1.6	1

Table 5c. Number of holidays in 2008 of those who made at least one holiday trip in 2008 – *by segment*

QUESTION: Q4. How many times did you go on holiday in 2008, 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 in 2008






	Total N	% 1	% 2	% 3	% 4-5	% 6-10	% 10+	% DK/NA
EU27	15988	45.1	27.5	12.3	8.5	3.8	1.6	1.1
 SEX								
Male	7827	47.5	26.4	12.0	8.1	3.7	1.4	1.0
Female	8161	45.1	27.5	12.3	8.5	3.8	1.6	1.1
 AGE								
15 - 24	3184	44.9	26.8	13.5	8.7	2.9	1.3	1.8
25 - 39	4808	49.8	27.7	10.7	6.4	3.6	1.2	0.7
40 - 54	5296	47.4	28.8	11.8	7.5	2.7	1.0	0.8
55 +	6127	40.0	26.4	13.3	10.9	5.5	2.6	1.4
 EDUCATION (end of)								
Until 15 years of	1778	51.0	25.9	9.4	8.2	2.2	1.9	1.4
16 - 20	6675	48.9	26.7	11.1	7.6	3.8	1.0	0.9
20 +	5370	39.4	28.6	14.7	9.7	4.7	2.0	0.9
Still in education	1820	43.4	28.6	12.9	9.1	3.0	1.7	1.4
 URBANISATION								
Metropolitan	2234	42.3	26.6	12.3	11.4	4.8	1.9	0.7
Urban	8098	44.4	27.5	13.4	8.0	4.0	1.7	1.0
Rural	5488	47.6	27.9	10.6	8.1	3.2	1.4	1.3
 OCCUPATION								
Self-employed	1714	41.9	27.7	13.7	9.0	4.7	2.1	0.8
Employee	6029	44.3	29.8	13.2	7.6	3.2	1.1	0.8
Manual worker	1037	58.8	22.6	7.8	3.3	5.0	0.8	1.7
Not working	7053	44.9	25.9	11.9	9.9	4.1	2.1	1.2

Table 6a. The main reason for not going on holiday in 2008 – *by country*

QUESTION: Q5. What was the main reason why you did not go on holiday in 2008?

Base : those who did not travel at all for business or private purposes or did not go on holiday





























	Total N	% Personal/private reasons	% Financial reasons	% Lack of time	% Prefer to only make short-stay trips	% No motivation to take a holiday in 2008	% Concerns about safety	% Prefer to stay at home or with family / friends	% Other	% DK/NA
 EU27	11320	21.3	41.3	10.2	1.9	3.8	0.8	8.9	7.8	4.1
COUNTRY										
 Belgium	388	16.3	20.3	7.9	2.9	7.1	0.3	7	7.2	30.9
 Bulgaria	643	14.5	63.1	6.2	1	2.1	0.1	4.3	4.7	4.1
 Czech Rep.	455	23.7	35	4.8	1.2	6.5	1.4	8.2	14.5	4.7
 Denmark	365	21.4	22.5	11.2	1.6	4.2	3.9	9.8	18.6	6.8
 Germany	701	26.5	34.4	12	3.6	4.3	0.9	8.8	7	2.6
 Estonia	234	14	37.7	9.6	2.6	10.6	0	7.8	4.3	13.4
 Greece	336	20	45.9	15	3	2.1	0.9	5.8	5.2	2.2
 Spain	557	23.4	49.3	9.6	1	2.9	0.3	5.8	5.8	1.8
 France	602	22.7	33.6	9.7	2.3	5.3	1.6	13.5	8.9	2.4
 Ireland	259	21.3	27.4	14.1	2.6	9.2	0.2	14.5	10.5	0.3
 Italy	717	30.2	39.1	8.4	0.6	3.2	1.4	6.9	5.5	4.8
 Cyprus	153	14.2	25.3	18.4	3.8	7.4	1	6	16.8	7.1
 Latvia	314	15	44.4	15.6	2.5	3.6	0	7.9	5.6	5.4
 Lithuania	251	20.2	31.5	6.4	3.2	8.1	0.4	6.9	9.5	13.8
 Luxembourg	124	31.5	12	10.3	1.3	4.1	1	22.9	15.3	1.5
 Hungary	704	14.6	60	4.4	1.7	1.2	0.6	7.6	5.3	4.6
 Malta	277	26.4	39.6	10.2	2.2	6.5	0.3	7.9	4.7	2.2
 Netherlands	221	28.1	16.1	7.7	2.4	3.7	0.3	16.5	11.9	13.3
 Austria	331	18.1	32.5	20.9	4	3.9	0	11.6	4.5	4.5
 Poland	804	15.9	52.3	11.1	0.4	1.1	0.5	8.9	7.1	2.6
 Portugal	567	11.5	66.4	8.6	0.3	1.8	0.2	4.2	5.3	1.6
 Romania	624	10.6	60.1	12.2	0.8	2.4	0.5	5.7	5.3	2.3
 Slovenia	149	14.6	37	19.7	7	3.3	0.6	7.9	4.3	5.7
 Slovakia	605	18.6	36.7	11.7	4	5.4	0.2	11.8	9.1	2.5
 Finland	327	20.6	20.9	14.2	6.4	7.9	0.5	15.4	10.5	3.5
 Sweden	277	18.3	19.8	9.4	4.2	7.8	0.7	16.3	11.5	11.8
 United Kingdom	536	19	34.3	10.8	2.4	5	0.3	11.1	13.4	3.7

Table 6b. The main reason for not going on holiday in 2008 – *by segment*

QUESTION: Q5. What was the main reason why you did not go on holiday in 2008?

Base : those who did not travel at all for business or private purposes or did not go on holiday






	Total N	% Personal/private reasons	% Financial reasons	% Lack of time	% Prefer to only make short-stay trips	% No motivation to take a holiday in 2008	% Concerns about safety	% Prefer to stay at home or with family / friends	% Other	% DK/NA
EU27	11320	21.3	41.3	10.2	1.9	3.8	0.8	8.9	7.8	4.1
 SEX										
Male	5386	18.9	38.8	14	2.2	3.9	0.3	9.8	8	4.1
Female	5934	23.5	43.6	6.7	1.6	3.6	1.2	8.1	7.5	4.1
 AGE										
15 - 24	1460	12.8	38.5	17	1.4	3.4	1.6	10.2	9.9	5.2
25 - 39	2363	17.5	47	14.9	2.3	2.8	0.3	5.1	6.4	3.6
40 - 54	2939	18.9	48.2	12	2.2	3.5	0.4	6.7	5.2	3
55 +	4427	27.9	35	4.4	1.6	4.5	1.1	11.8	9.4	4.4
 EDUCATION (end of)										
Until 15 years of age	2679	25.9	45.1	5.3	0.8	4.1	0.8	8.8	6.8	2.6
16 - 20	5186	19.5	44.3	11.1	2	3.5	0.5	8.4	6.9	3.7
20 +	2089	24.1	32.6	11.7	3.1	4.4	1.1	9	8.7	5.4
Still in education	917	12.8	36.4	18	1.4	2.6	1.5	9.6	11.3	6.4
 URBANISATION										
Metropolitan	1133	20.7	43.1	8.9	3	3.7	0.5	7.3	7.9	4.8
Urban	5426	21.4	41.8	9.5	1.6	3.9	1.1	8.8	7.6	4.3
Rural	4635	21.1	41	11.1	1.9	3.7	0.6	9.3	7.9	3.5
 OCCUPATION										
Self-employed	868	17.5	32.6	24.5	3.1	3.2	0.4	6.7	7.1	4.9
Employee	2493	19.9	38.7	13.9	2.1	4.2	0.8	8.8	7	4.5
Manual worker	1228	14.2	52.9	13.8	2.8	3.4	0	5.8	3.4	3.6
Not working	6633	23.7	41.7	6.2	1.4	3.7	1	9.7	8.9	3.7

Table 7a. The major motivation for main holiday trip – *by country*

QUESTION: Q6. What was the major motivation for your main holiday trip in 2008?

Base : those who went on at least one holiday trip during 2008





























	Total N	% Sun/beach	% Wellness/health treatment	% Rest/recreation	% City trips	% Sports-related	% Nature	% Culture / religion	% Visiting friends / relatives	% DK/NA
 EU27	15807	19.7	3.1	36.5	7	3.4	6.3	6.7	15.8	1.4
COUNTRY										
 Belgium	614	15.7	2.4	34.8	6.5	3	9.8	11.3	15.5	1.1
 Bulgaria	359	34.3	5.2	39.5	0.9	0.3	3.5	1.1	15.1	0.2
 Czech Rep.	546	30.7	5.3	32.5	1	6.1	14.6	3	6.3	0.3
 Denmark	639	21.7	1.4	20.7	13	3.8	12.6	12.3	13	1.5
 Germany	1299	17.8	4.4	31.4	6.6	6.3	12.4	8.6	11.1	1.4
 Estonia	278	7.2	8.9	46.1	2.2	0.7	0.8	8.7	24.5	0.8
 Greece	672	13.6	3.4	54.6	2.4	1.2	3.3	4.1	15.5	1.9
 Spain	949	18.4	1.7	36.7	9.6	2.2	4	8.5	18.1	0.8
 France	903	17.2	3.1	30.4	14.3	2.4	4.6	3.9	23	1
 Ireland	741	23.6	0.4	33.3	6.3	6.3	1.6	5.2	21.8	1.5
 Italy	790	18.7	2.9	41.1	4.4	2.1	3.6	8.7	16.3	2.1
 Cyprus	348	4.2	2.6	60.9	5.1	1.1	1.4	5.1	17.6	2.2
 Latvia	189	5.4	0.4	38.9	2.9	6.5	6.1	5.9	32.5	1.4
 Lithuania	252	23.3	4.3	38.9	16.7	0.2	4.5	2.6	8.9	0.6
 Luxembourg	379	13.4	3.4	29.4	10.2	7.7	7.8	9.7	17.8	0.5
 Hungary	309	19.7	4.5	48.8	4.4	0.6	5.1	3.9	12.7	0.2
 Malta	227	2.8	0.6	66.5	4.5	0.9	2.4	12.6	8.4	1.2
 Netherlands	779	14.7	0.4	47	2.4	3.1	10	8.5	13	1
 Austria	671	25.2	5.9	24	5.6	7.8	8.2	13.6	9.1	0.7
 Poland	711	15.7	5.2	48.5	8	2.6	4.8	1.9	12.2	1
 Portugal	434	25.8	2.6	44.6	1.1	0.2	3.2	4.6	17.7	0.2
 Romania	384	18.1	8.1	44.3	6.9	0.8	3.5	3.1	14.7	0.6
 Slovenia	354	25.8	6.3	37.6	10.3	2.9	4.6	2.3	9.7	0.6
 Slovakia	409	27.7	3.6	39.3	2.8	4.6	8.4	1.3	11.6	0.7
 Finland	682	11.3	4.5	30.6	9.3	6	6.2	5.2	25.4	1.4
 Sweden	723	23.4	0.9	21.1	5.3	5.3	7.9	9.6	23.8	2.6
 United Kingdom	965	27.7	0.4	35.6	5	3	2.4	6.5	17	2.4

Table 7b. The major motivation for main holiday trip – *by segment*

QUESTION: Q6. What was the major motivation for your main holiday trip in 2008?

Base : those who went on at least one holiday trip during 2008






	Total N	% Sun/beach	% Wellness/health treatment	% Rest/recreation	% City trips	% Sports-related	% Nature	% Culture / religion	% Visiting friends / relatives	% DK/NA
EU27	15807	19.7	3.1	36.5	7	3.4	6.3	6.7	15.8	1.4
 SEX										
Male	7729	18.9	2.4	39.4	6.8	4.1	6.3	5.8	14.7	1.6
Female	8078	20.4	3.7	33.7	7.3	2.8	6.4	7.7	16.9	1.2
 AGE										
15 - 24	2604	25.9	0.7	33.4	7.4	5.1	2.8	5.6	18.4	0.7
25 - 39	3839	20.7	1.6	41	6.6	2.9	4.1	4.4	16.7	1.9
40 - 54	4306	21.6	2.7	41.5	5.5	2.9	6.7	5.3	12.6	1
55 +	4895	13.8	5.7	30.4	8.5	3.2	9.5	10.3	16.8	1.6
 EDUCATION (end of)										
Until 15 years of age	1754	19.2	5.3	33.1	5.8	3.1	7.1	7.1	16.6	2.6
16 - 20	6612	21.3	3.3	38.1	6.3	3	6	5.8	15.2	1.1
20 +	5321	16.8	2.8	37.1	7.4	3.9	7.1	8.2	15.1	1.5
Still in education	1793	23.6	0.6	33.1	9.1	4.4	4.4	5.6	18.3	0.9
 URBANISATION										
Metropolitan	2219	18.5	3.2	34.7	8.9	3.5	7	5.6	16.6	2
Urban	8020	20.4	2.9	36.8	7.1	2.8	5.3	6.9	16.8	1.1
Rural	5421	19	3.2	36.8	6.3	4.4	7.7	7.1	14.1	1.5
 OCCUPATION										
Self-employed	1700	17.5	1.8	45.2	5.2	3.9	5.3	6.4	13.7	0.9
Employee	5981	21.1	2.5	40.1	6.5	3.6	6.2	6	12.9	1.2
Manual worker	1019	23.3	2.1	36.6	4.7	2.1	5.9	4.5	20.2	0.6
Not working	6968	18.6	4	31.2	8.4	3.4	6.6	7.9	18.1	1.8

Table 8a. Destination of the main holiday in 2008 – *by country*

QUESTION: Q7. Where did you travel for your main holiday in 2008 ?

Base : those who went on at least one holiday trip during 2008





























	Total N	% resident country	% EU27	% EFTA	% EU candidate country	% Other European countries	% North America	% Asia	% Africa	% Pacific	% Middle and South America	% Other country	% DK/NA
 EU27	15807	42.9	31.1	1.2	4.5	0.7	3.1	2.7	3.1	0.5	1.5	8	0.5
COUNTRY													
 Belgium	614	10.3	58.5	1.6	9.5	0.6	2.6	3	5.3	0.5	1.1	6.8	0.2
 Bulgaria	359	76.3	11.7	0.1	2.9	0.1	0.1	0.1	0	0.1	0	6.6	1.8
 Czech Rep.	546	25.7	41	0.7	19.8	0.1	1.4	0.9	6.1	0.3	0.7	3.1	0.2
 Denmark	639	16.4	54	2.8	5.8	0.5	5.2	4.2	2.6	1.3	2	4.4	0.9
 Germany	1299	25.4	43.1	2.4	8.9	1.3	4	4.9	1.1	0.3	1.1	6.7	0.8
 Estonia	278	26.4	51.4	0.3	4	7.7	1.5	1.4	3.2	0	0.2	3.9	0
 Greece	672	86.2	7.8	0.1	1.3	0.1	1	1.6	0.3	0	0.2	1.5	0
 Spain	949	69.8	12.9	1	0.3	0.9	0.7	0.9	1.2	0	4.1	7.8	0.4
 France	903	56.2	17.3	0.5	2.1	0.2	1.7	2.1	8.2	0.4	1.3	9.7	0.1
 Ireland	741	14.9	57.8	0.2	2.1	0.1	11.5	2.6	3.1	3.3	1.8	2.6	0
 Italy	790	62.6	19.5	0.5	0.8	0.9	2.1	0.3	2.6	0	1	8.9	0.8
 Cyprus	348	16.9	69.9	0	0.6	0.6	2.3	2.3	1.1	0.8	0	5.5	0
 Latvia	189	14.4	51.2	1.9	7.5	10.8	1.3	0.7	1.4	0	0.5	9.9	0.4
 Lithuania	252	43	36.8	0.4	8.5	2.5	0.1	0.3	3.4	0	0	4.2	0.7
 Luxembourg	379	6.2	64.1	3.1	4	1.3	3.6	4.4	6.6	0	0.9	5.8	0
 Hungary	309	61.5	24.1	0.1	4.7	0.2	0.5	0.7	4.9	0.1	0	1.5	1.6
 Malta	227	16.2	70.6	1.6	0	0	1.2	1.1	1.9	0.3	0	7.1	0
 Netherlands	779	18.3	53	3.5	5	0	3.1	3.5	1.5	0.9	2.9	8.2	0.1
 Austria	671	22.5	42.5	1.3	11.5	0.4	2.8	9.5	1.1	0.7	2.7	3.8	1.1
 Poland	711	66.9	19.1	0.6	3	0.1	0.7	0.5	3	0.1	0.8	5	0.1
 Portugal	434	58.8	20.7	0.5	0	0.8	0.9	0.4	0.5	0.1	3.3	14	0.1
 Romania	384	36.8	25.9	0.1	0.6	1.3	0.4	0.1	0.9	0	0	32.3	1.7
 Slovenia	354	14.2	16.4	0	42	0.5	1.1	0.5	2.6	0	0.8	20.8	1
 Slovakia	409	29.5	36	0.5	22.9	0.4	0.8	0.5	5.7	0	0.4	3.4	0
 Finland	682	39.1	34.2	1.7	1.7	0.6	3.9	6.4	1.7	0.7	0.5	9	0.4
 Sweden	723	37.6	32.8	2.1	4.1	0.2	3.7	7.4	2	0.7	1.3	7.6	0.5
 United Kingdom	965	22.8	43.8	0.8	3.2	0.4	8.5	4.3	4.4	1.9	1.9	7.3	0.7

Table 8b. Destination of the main holiday in 2008 – *by segment*

QUESTION: Q7. Where did you travel for your main holiday in 2008 ?

Base : those who went on at least one holiday trip during 2008






	Total N	% resident country	% EU27	% EFTA	% EU candidate country	% Other European countries	% North America	% Asia	% Africa	% Pacific	% Middle and South America	% Other country	% DK/NA
EU27	15807	42.9	31.1	1.2	4.5	0.7	3.1	2.7	3.1	0.5	1.5	8	0.5
 SEX													
Male	7729	43.6	30.7	1.2	4.6	0.6	3.1	2.7	3	0.5	1.5	8	0.6
Female	8078	42.2	31.6	1.1	4.5	0.8	3.1	2.8	3.2	0.6	1.6	8.1	0.5
 AGE													
15 - 24	2604	40.5	34.7	1.3	6.1	1	4	1.2	2.7	0.3	0.9	6.4	0.9
25 - 39	3839	43.1	29.4	0.5	5.2	0.9	3	3.1	4	0.6	2.1	7.8	0.2
40 - 54	4306	42.2	32.6	1.2	5.1	0.5	2.5	2.9	2.7	0.4	2	7.4	0.5
55 +	4895	45	29.2	1.6	2.6	0.5	3.3	3	3	0.6	1.1	9.6	0.5
 EDUCATION (end of)													
Until 15 years of age	1754	48.8	25.6	1.1	4.8	0.8	1.9	2	3.2	0.4	1	9.2	1.1
16 - 20	6612	43.7	30.7	1	5.2	0.7	2.6	2.2	3.2	0.4	1.7	8.5	0.3
20 +	5321	40.7	32.5	1.4	3.6	0.6	3.5	3.9	2.8	0.8	1.8	7.8	0.5
Still in education	1793	40.1	34.6	1.1	5.2	0.8	4.6	1.9	2.9	0.5	1	6.2	1
 URBANISATION													
Metropolitan	2219	41.7	30.6	1.2	4.3	0.8	3	2.9	3.6	0.4	1.5	9.1	0.9
Urban	8020	44.1	30.7	1.1	4.2	0.8	3.2	2.7	3	0.5	1.6	7.7	0.5
Rural	5421	41.4	32.1	1.2	5.2	0.6	3.1	2.8	2.9	0.7	1.5	8	0.5
 OCCUPATION													
Self-employed	1700	38.1	33.5	1.3	5.1	0.8	3.5	4.1	2.2	0.9	2.3	7.4	0.7
Employee	5981	40	33	1.1	5	0.5	3.3	2.7	3.5	0.7	1.8	7.8	0.5
Manual worker	1019	47.3	25.6	0.7	5.8	1.5	2.1	2.3	5.7	0.1	1.5	6.8	0.6
Not working	6968	45.8	29.9	1.2	3.8	0.7	3	2.5	2.4	0.3	1.2	8.5	0.6

Table 9a. The main method of transport – *by country*

QUESTION: Q8. How did you travel there in 2008? (what was the main method of transport?)

Base : those who went on at least one holiday trip during 2008





























	Total N	% Airplane	% Boat	% Train	% Bus	% Car / motorbike	% Bike (not motorised)	% Other	% DK/NA
 EU27	15807	36.3	3.1	6.3	6.6	46.7	0.2	0.9	0.1
COUNTRY									
 Belgium	614	42.4	0.7	5.2	4.8	45.8	0	0.9	0.2
 Bulgaria	359	6.6	0	8.6	24.7	59.5	0	0.4	0.2
 Czech Rep.	546	34	0.1	6.6	18	39.3	1.6	0.2	0.2
 Denmark	639	54.8	1.9	5	4.8	33	0	0.5	0
 Germany	1299	37.5	1.8	5.4	5.8	47.8	0.6	1	0
 Estonia	278	35.5	16.1	3.3	18.9	22	0	4	0.1
 Greece	672	16.8	24.2	1.5	10.3	46.6	0	0.6	0
 Spain	949	32.3	2.3	5.8	7	52	0	0.5	0.1
 France	903	29.7	2.1	8.3	2.9	56.8	0.1	0.1	0
 Ireland	741	78.1	3.2	1.7	2	14	0	1	0
 Italy	790	28.8	6.1	7.3	5.2	51.2	0	1.3	0.1
 Cyprus	348	81.5	3.4	0	0.9	14.2	0	0	0
 Latvia	189	43.5	3.8	5.6	22.6	22.1	0	0	2.3
 Lithuania	252	31.4	0.8	2.1	17	45.9	0	2.8	0.1
 Luxembourg	379	42.6	0.8	4.2	5.6	46.2	0	0.6	0
 Hungary	309	19.7	0	12.4	14.5	53	0.1	0.2	0
 Malta	227	69.8	26.1	0	0.5	2.7	0.7	0.2	0
 Netherlands	779	31.9	2.4	3.5	5.1	56.1	0.1	0.7	0.1
 Austria	671	42.7	1	3	4.8	47.1	1	0.3	0.2
 Poland	711	14.9	0.3	13.5	14	56.7	0.2	0.4	0
 Portugal	434	28.2	1	2.8	7.4	60.3	0	0.3	0
 Romania	384	14.6	0	11.9	15.3	56.8	0	1.3	0.1
 Slovenia	354	18.1	3	2.1	8.2	67.7	0	1	0
 Slovakia	409	27.9	0	5.2	19.9	45.9	0.5	0.1	0.5
 Finland	682	46.4	5.7	6	5.9	34.4	0.2	0.8	0.8
 Sweden	723	48.3	3.2	6.1	3.7	37.8	0	0.5	0.3
 United Kingdom	965	65	3.4	3.7	2.5	23.4	0.1	1.9	0

Table 9b. The main method of transport – *by segment*

QUESTION: Q8. How did you travel there in 2008? (what was the main method of transport?)

Base : those who went on at least one holiday trip during 2008






	Total N	% Airplane	% Boat	% Train	% Bus	% Car / motorbike	% Bike (not motorised)	% Other	% DK/NA
EU27	15807	36.2	3.1	6.3	6.6	46.7	0.2	0.9	0.1
 SEX									
Male	7729	35.4	2.8	6	5.5	49.1	0.2	0.8	0.1
Female	8078	37	3.3	6.5	7.5	44.4	0.2	1	0.1
 AGE									
15 - 24	2604	36.1	2.6	10.5	9.5	40.2	0.5	0.6	0
25 - 39	3839	39.8	3.8	4.3	3.6	47.9	0.1	0.5	0
40 - 54	4306	35.2	2.4	4.2	3.4	53.7	0.2	0.7	0.1
55 +	4895	34.2	3.3	7.5	10.3	43.1	0.2	1.4	0.1
 EDUCATION (end of)									
Until 15 years of age	1754	29.9	4.2	7.1	11.1	45.8	0.1	1.7	0.1
16 - 20	6612	34.6	2.9	5	6.2	50.2	0.1	0.8	0.1
20 +	5321	40.7	2.8	5.5	3.8	46.4	0.2	0.7	0.1
Still in education	1793	34.4	3.8	12	10.6	37.7	0.7	0.8	0
 URBANISATION									
Metropolitan	2219	38.5	3.7	8.3	5.8	42.9	0.1	0.7	0
Urban	8020	37.8	3.1	6.7	7.2	44.2	0.1	0.8	0.1
Rural	5421	33.1	2.8	4.7	6	51.9	0.4	1	0.1
 OCCUPATION									
Self-employed	1700	43.7	3.4	4	2.4	45.6	0	0.8	0
Employee	5981	40.4	2.6	4.6	3.2	48.2	0.2	0.7	0.1
Manual worker	1019	29.1	1.8	4.5	8.4	55.8	0	0.3	0
Not working	6968	31.9	3.6	8.5	10.1	44.4	0.3	1.1	0.1

Table 10a. Month when starting main holiday trip – *by country*

QUESTION: Q9. In which month in 2008 did you start your main holiday trip?

Base : those who went on at least one holiday trip during 2008





























	Total N	% January	% February	% March	% April	% May	% June	% July	% August	% September	% October	% November	% December	% DK/NA
 EU27	15807	2	2.8	2.9	4.4	6.6	11.1	23.7	26.5	9.3	4.1	2.1	3.3	1.1
COUNTRY														
 Belgium	614	1.7	3.3	2.5	7.3	7.3	9.6	30.2	20.7	8	3.6	2.1	1.4	2.4
 Bulgaria	359	0.4	0.4	0.1	1.9	3.3	7.1	25.5	43.8	7.7	2.9	0.9	3.1	2.9
 Czech Rep.	546	0.8	2.6	2.5	2	3.5	14.5	33	22.8	11.4	3.4	0.3	1.8	1.4
 Denmark	639	4.5	5.9	3.6	4.1	6.9	12.4	35.2	12.9	5.7	2.8	1.7	2.3	2.1
 Germany	1299	2.3	2.6	3.7	5.2	8.6	11.3	21.8	21.9	11.2	5.7	1.7	3.3	0.7
 Estonia	278	2.1	1.9	2.7	3.6	4.1	25.5	28.9	16.8	4.3	3	3.8	2.8	0.5
 Greece	672	0.8	2.3	3.3	4	2.8	9.2	26.4	36.2	4.1	3	2.1	3.7	2
 Spain	949	1.2	3.3	2.6	4.5	4.3	7.3	19.4	35	9.4	4.7	2	5	1.4
 France	903	2.4	4.3	3	5.5	4.9	9.4	21	28.8	10.1	3.7	2	4.2	0.6
 Ireland	741	3.9	3.2	4.8	4.1	8.6	16.1	21.7	15.7	10.3	4.9	2.8	3.1	0.7
 Italy	790	1.2	1.2	1.6	3.9	3.7	14.1	19.8	37.8	8.9	2.6	1.4	3.2	0.4
 Cyprus	348	2.7	2.4	4.2	5	1.4	6.7	27	34	6.6	5.2	2.8	1.4	0.6
 Latvia	189	7	4.6	1.3	3.1	13.3	10.6	17.2	15.5	6.8	4	6.5	9.6	0.6
 Lithuania	252	0.4	2.3	4	4.7	7	13.4	33.8	23.5	3.3	4.8	1.9	0.4	0.5
 Luxembourg	379	3.4	4.8	4.5	5.2	7	8.5	13	34.1	10.8	2.7	1.9	3.1	1
 Hungary	309	0	2.5	0.5	4	5.9	12.7	39.2	24.6	6.1	1.6	0.1	2.2	0.6
 Malta	227	4.6	1.9	1.2	4.5	4.1	10.5	18.9	22.8	13	5.1	5.3	8.1	0
 Netherlands	779	1.5	3.1	3.4	4.2	10.2	10.8	34.2	15.7	8.6	3.1	2.4	1.8	1
 Austria	671	2.3	3.5	1.7	4.2	7.7	10.1	21.5	23.9	11.8	5.3	3.5	3.5	1.1
 Poland	711	1.8	2.4	1.4	1	5.5	8.8	41	28.6	5	1.7	0.8	1.3	0.6
 Portugal	434	0.5	0.1	3.1	2.5	4.6	7.8	18.7	43.5	9.4	2	2.5	4.3	0.8
 Romania	384	3.3	1.8	2.6	1.5	5.1	10.6	26.4	30.4	5.2	2.1	2.3	3	5.6
 Slovenia	354	1.4	2.3	1.8	2.9	5.3	10.5	36.4	27.1	7.8	1	1.7	1.1	0.5
 Slovakia	409	0.4	1	0.7	1.2	4.1	11.9	39	28.3	8.1	0.8	1.1	1.5	1.8
 Finland	682	8	5	8.1	7.2	7.3	15.2	19.5	7.5	6.5	5.7	3.8	5.3	1.1
 Sweden	723	4.4	3.2	3.1	4.4	6.5	16.9	32	10.7	4.6	5.8	3.6	3.9	1
 United Kingdom	965	2.2	2.9	3.8	5.5	10.3	12.7	16.3	20.6	12.2	5.4	3.8	3.2	1

Table 10b. Month when starting main holiday trip – *by segment*

QUESTION: Q9. In which month in 2008 did you start your main holiday trip?

Base : those who went on at least one holiday trip during 2008






	Total N	% January	% February	% March	% April	% May	% June	% July	% August	% September	% October	% November	% December	% DK/NA
EU27	15807	2	2.8	2.9	4.4	6.6	11.1	23.7	26.5	9.3	4.1	2.1	3.3	1.1
 SEX														
Male	7729	2	2.6	2.4	3.9	6.2	11.5	24.8	26.9	9.6	3.9	1.9	3.3	1
Female	8078	2.1	3	3.5	4.9	6.9	10.7	22.6	26.1	9.1	4.3	2.4	3.3	1.1
 AGE														
15 - 24	2604	1.5	2.8	2.1	5	1.7	10.6	31.6	29	6.1	2.4	1.1	4.4	1.6
25 - 39	3839	1.9	3.2	3.1	2.7	6	9.1	22.5	32.5	8.6	4.3	2.3	3	0.7
40 - 54	4306	2.1	2.6	2.4	4.3	5.5	9.3	27.3	30.2	7.4	4	1.8	2.7	0.5
55 +	4895	2.3	2.7	3.7	5.4	10.5	14.5	17.3	17.7	13.3	4.8	2.9	3.4	1.4
 EDUCATION (end of)														
Until 15 years of age	1754	1.5	2	3.7	7	10.5	13.4	16.2	20.8	12.8	5.2	2.3	3	1.7
16 - 20	6612	2	3	2.6	4.2	6.6	11	22.4	27.9	9.5	4.2	2.1	3.7	0.7
20 +	5321	2.3	3.2	3.5	3.8	6.8	10.7	24.9	25.8	8.7	4.4	2.4	2.8	0.9
Still in education	1793	1.8	1.8	2.1	4.9	1.2	10	33.2	30.3	6.3	2.1	1	3.9	1.2
 URBANISATION														
Metropolitan	2219	2.1	3.1	2.7	3	6.1	11	27.3	26	8.9	3.7	1.4	3.8	0.9
Urban	8020	2	2.8	3	4.7	7	11.5	22.9	27.7	8.5	3.7	2.2	3.1	1.1
Rural	5421	2.1	2.7	2.9	4.7	6.3	10.8	23.6	25	10.5	4.8	2.4	3.3	1
 OCCUPATION														
Self-employed	1700	3.4	4.3	4.3	4.7	6.1	9.3	20.1	27.5	8	4.6	2.4	4.1	1.2
Employee	5981	1.7	3.2	2.8	3.5	5.7	9.9	25.4	28.9	8.8	4	2.4	3.2	0.4
Manual worker	1019	2.2	1.9	1.9	3.9	4.7	6.1	28.8	31.3	9.2	3.6	1.2	4.2	0.9
Not working	6968	2	2.1	2.8	5.3	7.8	13.4	22.4	23.5	9.8	4.1	2	3.1	1.6

Table 11a. Way of organising main holiday trip – *by country*

QUESTION: Q10. How did you organize your main holiday trip in 2008?

Base : those who went on at least one holiday trip during 2008





























	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
 EU27	15807	56.2	15.7	9.9	9.2	8.5	0.6
COUNTRY							
 Belgium	614	47.2	24	12.8	9.9	5.2	0.9
 Bulgaria	359	67.3	5.5	4.9	7.3	14.5	0.4
 Czech Rep.	546	43.3	30.3	8.5	6.1	10.9	0.9
 Denmark	639	32.9	18.4	24	13.8	10.9	0.1
 Germany	1299	50.8	21.3	9.5	9.2	8.7	0.5
 Estonia	278	58.1	17.3	5.8	11	7.8	0
 Greece	672	78.7	7	2.3	6.2	5.6	0.2
 Spain	949	56.5	18.5	9	9	6.4	0.6
 France	903	64.3	9	8.2	8.3	10	0.1
 Ireland	741	46	14.1	18.3	12.3	9	0.3
 Italy	790	61.3	21	8.3	5.5	3.7	0.2
 Cyprus	348	47.7	17.4	7.9	22.2	4.4	0.5
 Latvia	189	64.4	9.6	4.5	16.1	5.2	0.1
 Lithuania	252	68	18.7	0.3	4.8	8	0.3
 Luxembourg	379	51.5	19.1	10.6	9.4	8.6	0.9
 Hungary	309	71.5	14.9	4	2.2	7.4	0
 Malta	227	49.5	16.9	8.3	18.9	6.3	0
 Netherlands	779	39.3	11.8	22.8	10.3	14.7	1
 Austria	671	51.8	19.3	9.6	13.5	5.1	0.7
 Poland	711	74.8	10.8	2.9	4	7.2	0.3
 Portugal	434	67.5	13.9	6.3	5.5	6.3	0.5
 Romania	384	60.9	15.2	5.5	4.5	13.7	0.2
 Slovenia	354	62.4	23.5	3.9	7.5	2.7	0
 Slovakia	409	50.3	31.4	3.4	8.2	6.3	0.3
 Finland	682	61.4	13.8	11.4	7.7	5.3	0.4
 Sweden	723	56.1	11.8	13.6	8.9	8.1	1.6
 United Kingdom	965	45.2	9.6	15.3	16.8	11.7	1.5

Table 11b. Way of organising main holiday trip – *by segment*

QUESTION: Q10. How did you organize your main holiday trip in 2008?

Base : those who went on at least one holiday trip during 2008






	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
EU27	15807	56.2	15.7	9.9	9.2	8.5	0.6
 SEX							
Male	7729	58.3	15	10.2	8.5	7.5	0.5
Female	8078	54.2	16.4	9.6	9.7	9.5	0.6
 AGE							
15 - 24	2604	54.8	17	10.5	7.2	9.1	1.3
25 - 39	3839	57.6	15.6	12.2	7.3	7.2	0.2
40 - 54	4306	59.1	13.7	11.1	9.5	6.4	0.2
55 +	4895	53.6	17	6.6	11.2	10.9	0.7
 EDUCATION (end of)							
Until 15 years of age	1754	49.3	18	6.9	12	12.6	1.2
16 - 20	6612	55.9	15.4	10.2	9.8	8.3	0.4
20 +	5321	60.4	14.5	10.2	8.2	6.5	0.2
Still in education	1793	52.7	17.2	11	7	10.4	1.6
 URBANISATION							
Metropolitan	2219	59	13.8	8.9	8.2	9.3	0.7
Urban	8020	56.4	16.2	9.5	9.5	7.9	0.5
Rural	5421	54.4	15.9	11	9	9.1	0.6
 OCCUPATION							
Self-employed	1700	58.4	16.2	10.8	8.3	5.8	0.4
Employee	5981	56.5	14.1	11.7	10.1	7.3	0.2
Manual worker	1019	59.3	17.6	8.2	6.9	7.8	0.3
Not working	6968	54.9	16.7	8.4	8.9	10.2	0.9

Table 12a. Amount of money was spent for holidays in 2008 compared to 2007 – *by country*

QUESTION: Q11. In 2008, did you spend more, less or the same amount of money for all your holidays compared to 2007?





























	Total N	% More	% Less	% Same	% DK/NA
 EU27	27127	26.7	22	36.9	14.4
COUNTRY					
 Belgium	1002	21.8	13.6	42.9	21.8
 Bulgaria	1002	21.5	7.9	26.6	44
 Czech Rep.	1001	24.1	19.8	39.7	16.3
 Denmark	1004	24.6	22	40.6	12.7
 Germany	2000	24	23.9	40.9	11.3
 Estonia	512	32.3	19.4	25.6	22.7
 Greece	1008	38.4	23.1	29.6	8.8
 Spain	1506	25.3	25	35.2	14.5
 France	1505	26.8	27.1	35	11
 Ireland	1000	36.5	21.1	38.3	4.1
 Italy	1507	26.9	19.6	31.8	21.6
 Cyprus	501	35.8	23.8	29.3	11.1
 Latvia	503	29.5	20.6	30.1	19.8
 Lithuania	503	36.6	18.1	22.8	22.6
 Luxembourg	503	31.4	21.6	37.8	9.3
 Hungary	1013	13.4	18.8	55.1	12.7
 Malta	504	29	22.7	28.4	20
 Netherlands	1000	28.6	19.4	39.2	12.8
 Austria	1002	28.4	22.7	38.1	10.8
 Poland	1515	29.4	16.5	37.8	16.4
 Portugal	1001	18	23.5	39.5	18.9
 Romania	1008	30.8	15.2	33.7	20.3
 Slovenia	503	28.1	22.6	38.9	10.4
 Slovakia	1014	23.5	16.2	37.1	23.2
 Finland	1009	29.3	19.6	45.8	5.4
 Sweden	1000	34	25.8	36.4	3.8
 United Kingdom	1501	28.7	25.2	37.4	8.8

Table 12b. Amount of money was spent for holidays in 2008 compared to 2007 – *by segment*

QUESTION: Q11. In 2008, did you spend more, less or the same amount of money for all your holidays compared to 2007?






	Total N	% More	% Less	% Same	% DK/NA
EU27	27127	26.7	22	36.9	14.4
 SEX					
Male	13115	26.8	21.8	37.9	13.5
Female	14012	26.7	22.2	35.9	15.2
 AGE					
15 - 24	4064	37.4	22.2	28	12.4
25 - 39	6202	31.7	26.4	31.4	10.5
40 - 54	7245	25.6	23.6	38.9	11.9
55 +	9323	19.9	18	42.9	19.3
 EDUCATION (end of)					
Until 15 years of age	4433	18	19.3	38.9	23.8
16 - 20	11798	25.8	22.3	38.1	13.8
20 +	7410	30.1	24	37.2	8.7
Still in education	2710	37	21.2	29.4	12.3
 URBANISATION					
Metropolitan	3352	32.1	21.7	34	12.3
Urban	13447	27.6	22.5	35.8	14.1
Rural	10055	23.9	21.5	39.4	15.2
 OCCUPATION					
Self-employed	2568	28.4	22.9	38.8	9.9
Employee	8474	31	25.6	36.1	7.4
Manual worker	2247	25.8	22.8	35.2	16.1
Not working	13601	23.8	19.7	37.3	19.2

Table 13a. Impact of changes in cost of living on travel and holiday plans – *by country*

QUESTION: Q12. Did changes in your cost of living have an impact on your 2008 travel /holiday plans?





























	Total N	% Yes	% No, no changes in cost of living	% No, no impact on travel plans	% DK/NA
 EU27	27127	34.6	24.9	33.9	6.5
COUNTRY					
 Belgium	1002	21.3	32.3	28.3	18.1
 Bulgaria	1002	43	14.2	16.9	25.8
 Czech Rep.	1001	14.9	43.2	31.1	10.8
 Denmark	1004	11.4	55.1	28.7	4.8
 Germany	2000	25	25.5	45.6	4
 Estonia	512	30.1	17.4	38.3	14.1
 Greece	1008	51.2	16.6	28.7	3.5
 Spain	1506	34.6	40.1	17.8	7.5
 France	1505	40.5	21.8	33.9	3.8
 Ireland	1000	30.4	22	45.7	1.8
 Italy	1507	52.4	16.6	22.2	8.8
 Cyprus	501	33.4	36.1	25.2	5.3
 Latvia	503	52.9	12.2	27.3	7.6
 Lithuania	503	41.4	16.4	31	11.2
 Luxembourg	503	19.8	28.1	48.4	3.6
 Hungary	1013	41.9	22.4	32	3.7
 Malta	504	50.5	14.8	29.9	4.8
 Netherlands	1000	12.6	36.9	44.9	5.6
 Austria	1002	21.7	34.7	40.3	3.3
 Poland	1515	32.3	20.1	36.5	11.1
 Portugal	1001	58.3	14.9	18.3	8.5
 Romania	1008	45.3	20	28.6	6.1
 Slovenia	503	18	24.2	53.9	3.9
 Slovakia	1014	30.8	32.8	27.7	8.7
 Finland	1009	13.5	29.8	53.9	2.8
 Sweden	1000	17.6	32.1	45.2	5.2
 United Kingdom	1501	32.4	21.8	42	3.8

Table 13b. Impact of changes in cost of living on travel and holiday plans – *by segment*

QUESTION: Q12. Did changes in your cost of living have an impact on your 2008 travel /holiday plans?






	Total N	% Yes	% No, no changes in cost of living	% No, no impact on travel plans	% DK/NA
EU27	27127	34.6	24.9	33.9	6.5
 SEX					
Male	13115	32.1	25.4	36.1	6.3
Female	14012	37	24.5	31.8	6.7
 AGE					
15 - 24	4064	28.8	28.6	33.8	8.8
25 - 39	6202	40.7	24.2	31.2	3.9
40 - 54	7245	39.1	23.2	33.1	4.6
55 +	9323	30	25.4	35.9	8.6
 EDUCATION (end of)					
Until 15 years of age	4433	39.8	22.3	28.5	9.4
16 - 20	11798	36.6	22.8	34.6	6
20 +	7410	31.2	28.5	36.9	3.5
Still in education	2710	26.6	29.5	33.6	10.2
 URBANISATION					
Metropolitan	3352	33.9	26.4	33.3	6.4
Urban	13447	35.1	25.8	32.6	6.5
Rural	10055	34.1	23.3	36.1	6.6
 OCCUPATION					
Self-employed	2568	32.4	26.3	37	4.2
Employee	8474	34.4	25.9	36.8	3
Manual worker	2247	44.2	22	28.6	5.2
Not working	13601	33.7	24.6	32.3	9.3

Table 14a. Type of the impact on travel plans – *by country*

QUESTION: Q12A. How did it impact your 2008 travel /holiday plans?





























	Total N	% It had an influence on how much I spent on travels	% It influenced the length of my trips/holidays	% It meant that I took no holidays at all	% DK/NA
 EU27	9396	33.7	21.6	37.7	7.1
COUNTRY					
 Belgium	213	35	16	24.8	24.2
 Bulgaria	431	19.6	14.3	60.6	5.5
 Czech Rep.	149	34.4	35.2	21.5	9
 Denmark	115	47.1	26.3	17.7	8.9
 Germany	499	31.7	25.8	34.9	7.6
 Estonia	154	48.6	14.7	29.9	6.8
 Greece	516	29.8	34.6	30.7	4.9
 Spain	520	31.8	23.3	38.1	6.8
 France	610	41.4	20.5	34.3	3.8
 Ireland	304	44.3	28.7	21.9	5.1
 Italy	790	35.6	23.4	29.3	11.7
 Cyprus	167	51.3	19.2	19.8	9.7
 Latvia	266	49.5	12.8	30.2	7.5
 Lithuania	208	40.5	20.3	34.7	4.5
 Luxembourg	100	47.1	28.7	17.7	6.5
 Hungary	425	25.9	7.3	62.3	4.5
 Malta	255	36.8	10.9	46.7	5.6
 Netherlands	126	43.7	23.2	29.7	3.5
 Austria	218	29	27.6	34.9	8.5
 Poland	489	23.2	21.7	48.1	7
 Portugal	583	18.3	22.1	56.2	3.5
 Romania	457	23	10.9	60.4	5.7
 Slovenia	90	23.5	27	46.3	3.3
 Slovakia	312	17.4	18.4	60.3	4
 Finland	137	45.2	27.1	21.9	5.8
 Sweden	176	41.5	24.8	19.7	14
 United Kingdom	486	43.5	18.2	33.3	4.9

Table 14b. Type of the impact on travel plans – *by segment*

QUESTION: Q12A. How did it impact your 2008 travel /holiday plans?






	Total N	% It had an influence on how much I spent on travels	% It influenced the length of my trips/holidays	% It meant that I took no holidays at all	% DK/NA
EU27	9396	33.7	21.6	37.7	7.1
 SEX					
Male	4214	33.8	21.5	37.3	7.4
Female	5182	33.6	21.6	38	6.8
 AGE					
15 - 24	1170	39.1	27.9	26.4	6.6
25 - 39	2525	35.1	23.2	34.8	6.9
40 - 54	2836	32.1	22.7	39.2	6.1
55 +	2801	31.8	16.5	43.3	8.4
 EDUCATION (end of)					
Until 15 years of age	1763	27.2	14.3	50.1	8.4
16 - 20	4321	32.9	19.8	41.1	6.1
20 +	2309	39	28.2	24.8	7.9
Still in education	721	38.6	29.2	25.5	6.7
 URBANISATION					
Metropolitan	1136	37.5	22.7	33.7	6.1
Urban	4721	33.9	22.6	35.9	7.6
Rural	3429	32.4	19.6	41.3	6.7
 OCCUPATION					
Self-employed	832	36.2	21.9	33.6	8.3
Employee	2911	38.4	27.7	28	6
Manual worker	993	28.5	15.9	50	5.7
Not working	4583	31.2	18.7	42.3	7.8

Table 15a. Where would people make saving on their holiday budget? – *by country*

QUESTION: Q13. If you had to make savings on your holiday budget, where would you save?





























	Total N	% On accommodation	% On the type of transportation	% On the destination (i.e. the distance I would consider travelling)	% On the timing of booking (e.g. a last-minute decision)	% On the timing of the holidays (low season)	% DK/NA
 EU27	27127	15.1	8.4	19.8	11.7	23	21.9
COUNTRY							
 Belgium	1002	12	9.6	17.5	8.9	19.2	32.7
 Bulgaria	1002	11.9	4.4	13.4	6.3	12.8	51.1
 Czech Rep.	1001	12.3	13.1	26	12.3	15.8	20.4
 Denmark	1004	11.4	11	19.2	14.2	23.3	20.9
 Germany	2000	11.6	5.8	22.8	15.5	24.3	20
 Estonia	512	19.6	10.9	14.9	11.1	13.8	29.7
 Greece	1008	19.9	7.3	17.7	16.6	22.5	16.1
 Spain	1506	19.1	8.6	16.3	10	24.5	21.5
 France	1505	17.8	12.3	21.8	7.5	22.7	17.9
 Ireland	1000	16.3	8.6	19.2	17.2	29.5	9.1
 Italy	1507	12.6	10	11.1	10.7	26	29.6
 Cyprus	501	12.3	4.3	27.7	14.8	24.9	16.1
 Latvia	503	14.2	16.1	19.7	3	21	26
 Lithuania	503	18.7	8.2	25.2	9.3	9.9	28.6
 Luxembourg	503	12.7	14.5	19.6	12	23.1	18.2
 Hungary	1013	23	6.9	22.4	5.7	20.3	21.7
 Malta	504	14.3	9.2	14	15.2	21.5	25.9
 Netherlands	1000	11.6	9.2	22	13.3	22	22
 Austria	1002	12.2	4.2	23.2	12.8	26.1	21.5
 Poland	1515	18.7	8.3	16.8	7.5	22.4	26.3
 Portugal	1001	19.6	5.3	22.5	3.7	22.8	26.1
 Romania	1008	24.2	10.5	14.2	7.5	15.6	28
 Slovenia	503	17.9	7.5	14.1	13.5	28.7	18.4
 Slovakia	1014	12.7	11.1	22.6	16.3	20.3	17
 Finland	1009	10.3	9.1	30.6	12.3	19.3	18.4
 Sweden	1000	12.1	8.5	24.9	16.5	17.2	20.8
 United Kingdom	1501	11.7	5.5	25.9	17.9	25.9	13

Table 15b. Where would people make saving on their holiday budget? – *by segment*

QUESTION: Q13. If you had to make savings on your holiday budget, where would you save?






	Total N	% On accommodation	% On the type of transportation	% On the destination (i.e. the distance I would consider travelling)	% On the timing of booking (e.g. a last-minute decision)	% On the timing of the holidays (low season)	% DK/NA
EU27	27127	15.1	8.4	19.8	11.7	23	21.9
 SEX							
Male	13115	15.4	9.1	20.3	11.4	22.4	21.6
Female	14012	14.8	7.7	19.5	12.1	23.6	22.3
 AGE							
15 - 24	4064	19.5	14.4	17.9	15.6	21.3	11.2
25 - 39	6202	17.5	9	21.7	13.6	25.9	12.2
40 - 54	7245	15.8	7.2	22.8	11.7	23.6	18.9
55 +	9323	11.1	6.4	17.1	8.9	21.6	34.8
 EDUCATION (end of)							
Until 15 years of age	4433	12.6	5.8	16.1	8.4	22.2	35
16 - 20	11798	14.6	7.7	20.4	12	24.3	21
20 +	7410	16.1	8.4	22.5	12.3	23.4	17.3
Still in education	2710	20.2	15.8	18.2	16	18.9	10.9
 URBANISATION							
Metropolitan	3352	15.8	9	19.5	11.5	23.6	20.6
Urban	13447	15.3	9.2	19	12.2	23.1	21.2
Rural	10055	14.4	7.2	21.4	11.2	22.8	23
 OCCUPATION							
Self-employed	2568	14.4	8.2	20.5	12.5	22.7	21.7
Employee	8474	15.4	7.8	23.6	13.9	25.6	13.6
Manual worker	2247	21.6	8.9	20.9	9.4	22.8	16.3
Not working	13601	14	8.6	17.4	10.6	21.6	27.8

Table 16a. Type of holidays or trips to give up or to reduce first if have to make saving on travel plans – *by country*

QUESTION: Q14. If you would have to make savings on your travel plans and holidays, what kind of holidays or trips would you be prepared to give up or to reduce first?





























	Total N	% Short-stay trips	% Winter holidays	% Summer holidays	% None (I would not give up any trip at all)	% DK/NA
 EU27	27127	16.6	41.5	12.1	18.8	11
COUNTRY						
 Belgium	1002	15.5	33.6	10.3	21.6	19
 Bulgaria	1002	9.7	28.8	4.9	13.2	43.3
 Czech Rep.	1001	22.6	40.3	9.5	18.3	9.2
 Denmark	1004	22.2	38.8	10.9	23.8	4.3
 Germany	2000	17.4	45.4	10.1	21	6
 Estonia	512	10.3	32.7	7.4	21.1	28.4
 Greece	1008	19.1	46.2	15.8	13	6
 Spain	1506	19.6	37.9	16.5	15.3	10.8
 France	1505	16.4	47.7	11.8	19	5.1
 Ireland	1000	25.7	29.2	19.3	23.1	2.7
 Italy	1507	10.2	49.4	10.4	11.2	18.8
 Cyprus	501	15.7	47.1	12.5	17.3	7.4
 Latvia	503	18	38.2	6.2	14.9	22.6
 Lithuania	503	13.3	41.6	10.5	12.3	22.4
 Luxembourg	503	18.4	40	12.4	24.8	4.4
 Hungary	1013	13.2	44.5	13.7	10.3	18.3
 Malta	504	11.2	35.4	12.4	27	14
 Netherlands	1000	19.3	37.5	10	26.4	6.9
 Austria	1002	11.9	46.5	11.1	17.6	12.9
 Poland	1515	14.1	49.4	7.4	13.2	15.8
 Portugal	1001	13.3	40.4	15.2	12	19.1
 Romania	1008	19.1	29.1	9.3	21.5	21
 Slovenia	503	16.7	57	8.4	13	4.9
 Slovakia	1014	20.8	43.1	14.6	10.9	10.6
 Finland	1009	20.6	27.7	11.3	32.4	8
 Sweden	1000	17.3	38.9	19	17.9	6.8
 United Kingdom	1501	19.3	28.5	17.4	30.1	4.6

Table 16b. Type of holidays or trips to give up or to reduce first if have to make saving on travel plans – *by segment*

QUESTION: Q14. If you would have to make savings on your travel plans and holidays, what kind of holidays or trips would you be prepared to give up or to reduce first?






	Total N	% Short-stay trips	% Winter holidays	% Summer holidays	% None (I would not give up any trip at all)	% DK/NA
EU27	27127	16.6	41.5	12.1	18.8	11
 SEX						
Male	13115	17.8	40.5	12.2	19.6	9.8
Female	14012	15.4	42.4	12	18	12.2
 AGE						
15 - 24	4064	19.5	45.8	11	18.3	5.4
25 - 39	6202	19.3	44.3	13.7	16.7	6.1
40 - 54	7245	18	43.9	12	16.5	9.6
55 +	9323	12.6	36.2	11.6	22	17.7
 EDUCATION (end of)						
Until 15 years of age	4433	12.7	35.6	13.3	17.4	21
16 - 20	11798	15.9	42.4	12.5	18.9	10.3
20 +	7410	19.3	42.4	11.3	20.4	6.6
Still in education	2710	20.3	47.8	10.3	16	5.6
 URBANISATION						
Metropolitan	3352	18.5	41.9	10.3	18.7	10.6
Urban	13447	16.2	42.6	12.6	18.6	10
Rural	10055	16.2	40.4	12.1	19	12.3
 OCCUPATION						
Self-employed	2568	18.7	38.9	13.5	20	8.9
Employee	8474	19.9	43.8	11.6	19	5.8
Manual worker	2247	16.6	46.2	12.2	16.7	8.2
Not working	13601	14.1	40	12.1	18.7	15.1

Table 17a. Type of leisure spending to reduce on holiday – *by country*

QUESTION: Q15. 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
 EU27	27127	9.1	16.2	23.2	23	8.3	7.5	6.6	6.1
COUNTRY									
 Belgium	1002	5.1	14	17.2	20.9	6	16	5.2	15.7
 Bulgaria	1002	6.8	14.6	11.9	6.5	6.7	7	18.7	27.7
 Czech Rep.	1001	9.8	15.4	23.2	22	9.1	10.2	4.6	5.9
 Denmark	1004	6.6	13.3	22.9	25.8	12.2	13.7	2.9	2.6
 Germany	2000	10.8	10	30.3	25.9	9.4	7	3.6	3.1
 Estonia	512	8.5	26.2	18.1	15.3	4.3	11.8	5.1	10.8
 Greece	1008	8.1	10.8	28.9	27.3	7.7	7.7	7.1	2.4
 Spain	1506	7.9	19.3	23.6	21.1	4.9	8	10.4	4.8
 France	1505	10.3	21.8	25.7	22.6	7.1	5.7	3.9	2.8
 Ireland	1000	12	17.5	30.5	20.4	13.3	3.7	1.2	1.3
 Italy	1507	7.9	13.6	19.5	23	8.2	8.5	6.8	12.5
 Cyprus	501	8.3	8.1	30.4	25.1	9.4	9.3	5.4	4
 Latvia	503	7.6	32.8	20.9	7.8	3.6	8.5	10.7	8.1
 Lithuania	503	8	32	20.2	10.2	4.7	4.5	8	12.4
 Luxembourg	503	10.8	10.7	27.8	28	12	7	1.4	2.4
 Hungary	1013	9.8	14.1	21.6	18.7	6.1	7.6	15.8	6.4
 Malta	504	6.6	10.7	27.4	28.6	10.2	9.1	2.8	4.8
 Netherlands	1000	7.2	16.3	14.4	28.8	8.9	11.5	8.3	4.6
 Austria	1002	8.2	7.4	34.6	25.9	7.7	5.8	4.4	6
 Poland	1515	10.2	20.9	15.3	28.8	3.9	6	8.8	6.1
 Portugal	1001	5.8	19.1	19.3	15.9	4.7	7.6	21.1	6.5
 Romania	1008	5.5	23	17.7	11.8	3.2	8.6	16.9	13.3
 Slovenia	503	7.3	20.3	24.2	27.4	5.6	5.9	4.7	4.5
 Slovakia	1014	11.7	15.2	20.3	26.9	8	7.4	6.7	3.9
 Finland	1009	12.7	18.5	20.7	23.7	9.2	7.9	4.5	2.8
 Sweden	1000	6.5	8.7	28.5	26.8	14.1	7.9	3.5	4.1
 United Kingdom	1501	10.1	16.4	23.9	23.1	15.8	6.4	1.5	2.8

Table 17b. Type of leisure spending to reduce on holiday – *by segment*

QUESTION: Q15. 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
EU27	27127	9.1	16.2	23.2	23	8.3	7.5	6.6	6.1
 SEX									
Male	13115	9.4	16.7	23.7	23.7	6.5	8.4	6.4	5.2
Female	14012	8.7	15.7	22.8	22.3	9.9	6.7	6.9	6.9
 AGE									
15 - 24	4064	12.4	15.7	20.2	29.9	11.1	4.5	3.6	2.7
25 - 39	6202	10.6	15.2	24.9	27.3	8.9	5.5	5.4	2.2
40 - 54	7245	8.3	17.3	25.8	22.9	8	6.3	7	4.4
55 +	9323	7.2	16.3	21.6	17.3	6.9	11	8.5	11.1
 EDUCATION (end of)									
Until 15 years of age	4433	7.8	15	20.4	16.2	8.2	8.7	10.9	12.8
16 - 20	11798	9.9	17	23.5	22.2	8.1	7.3	6.6	5.3
20 +	7410	8.1	16.2	26.2	26.1	7.2	7.8	4.9	3.6
Still in education	2710	10.8	15.8	21.3	31.4	12.1	4.1	2.2	2.2
 URBANISATION									
Metropolitan	3352	8.4	17.8	23.9	21.6	8.7	6.8	7.9	4.8
Urban	13447	9.3	16.8	22.7	23.2	8.5	7.9	6.3	5.3
Rural	10055	9	15.2	23.7	23.3	7.9	7.2	6.5	7.2
 OCCUPATION									
Self-employed	2568	10.4	13.1	27.6	23.9	5.4	9.5	6.1	4
Employee	8474	8.7	16.3	25.8	27	8.9	6.2	4.8	2.3
Manual worker	2247	11.7	18.2	21.8	21.8	8	6.1	8.6	3.9
Not working	13601	8.6	16.5	21.2	20.6	8.6	8.1	7.5	9

Table 18a. The most important consideration when deciding on holiday trip – *by country*

QUESTION: Q16. When you are deciding on a holiday trip, which of the following considerations are the most important in your decision-making?





























	Total N	% Quality of service	% Price	% Value for money	% Environmental considerations	% Social considerations	% Safety/security	% Other	% DK/NA
 EU27	27127	12.2	15.6	33.4	8.7	5.5	13.2	5.2	6.2
COUNTRY									
 Belgium	1002	14.8	13.3	27.1	7.2	5.8	10	5.1	16.8
 Bulgaria	1002	7.8	22.5	25	3.4	3.9	5.3	5.7	26.5
 Czech Rep.	1001	25.9	31.7	15.3	1.8	7.4	8	5.2	4.8
 Denmark	1004	18.4	20.5	9.9	2.5	13.4	21.4	8.6	5.3
 Germany	2000	11.2	7.2	46	7.3	4	14.2	5.8	4.3
 Estonia	512	4.6	18.8	37.7	6.9	3	15.2	2.9	10.9
 Greece	1008	15.7	20.6	14.1	16.2	10.2	17.5	3.8	2
 Spain	1506	11.8	9.6	46.4	6.7	3.6	10	5.9	6
 France	1505	10.8	13.7	37.5	14.9	3.1	12.1	3.9	3.9
 Ireland	1000	14.5	9.6	37.4	5.1	8.6	18.6	4.9	1.4
 Italy	1507	12.8	8.6	33.7	10.5	3.4	18.1	2.6	10.3
 Cyprus	501	12.4	24.2	9.9	7.8	9.8	25.2	6.2	4.4
 Latvia	503	6.8	40.3	23.7	4.7	1.5	9.2	4.8	9.1
 Lithuania	503	4.9	35.2	24.9	8.3	1.5	10.5	4.6	10
 Luxembourg	503	15.5	8.5	34.1	8.3	4.4	22.4	3.6	3.2
 Hungary	1013	5.6	39.4	20.8	12.7	4.1	6.9	3.9	6.5
 Malta	504	15.3	10.6	23.7	5	1.6	34.6	2.2	7.1
 Netherlands	1000	18.1	14.1	15.7	4.1	12.3	16.8	13.1	5.8
 Austria	1002	9.9	5.9	47.3	6	4.5	16.3	4.3	5.8
 Poland	1515	6.3	34.6	13.1	13.4	12.7	10.7	3.3	5.9
 Portugal	1001	5.4	16.6	40.1	11.4	3.1	11	2.9	9.5
 Romania	1008	16.5	32.3	23.2	2.7	2.1	10.1	2.8	10.3
 Slovenia	503	22.2	24	9.4	14.4	5.8	18	2.8	3.6
 Slovakia	1014	14.3	26.9	38.2	2.7	1.3	9.1	3.6	4.1
 Finland	1009	11.8	15.9	23	9.9	8.8	22.2	5.2	3.2
 Sweden	1000	10.7	13.8	19.3	11.8	17.4	13.7	7.4	5.9
 United Kingdom	1501	14.8	12.8	36.8	4.9	6.3	13.2	8.9	2.3

Table 18b. The most important consideration when deciding on holiday trip – *by segment*

QUESTION: Q16. When you are deciding on a holiday trip, which of the following considerations are the most important in your decision-making?






	Total N	% Quality of service	% Price	% Value for money	% Environmental considerations	% Social considerations	% Safety/security	% Other	% DK/NA
EU27	27127	12.2	15.6	33.4	8.7	5.5	13.2	5.2	6.2
 SEX									
Male	13115	13	15.1	35.7	8.9	6.2	10.9	5.3	5
Female	14012	11.4	16.1	31.2	8.5	5	15.4	5.1	7.3
 AGE									
15 - 24	4064	11.9	16.9	35.2	6.9	8.2	13.3	4.4	3.2
25 - 39	6202	13.4	15.3	38.1	7.8	4.7	12.4	5.3	3
40 - 54	7245	12.7	15.1	36	8.4	5.2	13.3	5.1	4.2
55 +	9323	11.1	15.7	27.6	10.3	5.2	13.6	5.6	10.8
 EDUCATION (end of)									
Until 15 years of age	4433	9.3	18	29.1	7.7	4.1	14.4	5	12.4
16 - 20	11798	12.4	17	34.8	8	4.4	13.6	4.7	5
20 +	7410	13.5	11.8	35	10.9	6.7	11.8	6.3	4.1
Still in education	2710	12.7	16.1	33.7	7.2	9.9	12.8	4.3	3.3
 URBANISATION									
Metropolitan	3352	12.1	12.9	36.9	9.6	6.1	11.1	5.8	5.6
Urban	13447	12.8	16.1	31.2	9.1	5.9	14	5.2	5.7
Rural	10055	11.5	16	35.1	7.7	4.9	13	5	6.7
 OCCUPATION									
Self-employed	2568	15.6	10.2	34.3	9.5	5.7	12.8	7.1	4.9
Employee	8474	13	12.4	40	8.6	5.7	12	5.4	2.7
Manual worker	2247	11.8	26.3	31.1	6.5	4.4	13.1	3.3	3.4
Not working	13601	11.1	16.9	29.6	8.8	5.6	14.1	5.1	8.9

Table 19a. Preferred holiday destinations – *by country*

QUESTION: Q17. What type of holiday destinations do you prefer?





























	Total N	% Traditional, well-known destinations	% Non-traditional, emerging destinations	% Not important, no preference	% DK/NA
 EU27	27127	53.8	27.8	14.6	3.9
COUNTRY					
 Belgium	1002	41.1	30.1	16.6	12.2
 Bulgaria	1002	32.2	14.1	30.4	23.3
 Czech Rep.	1001	64.2	20.7	10.7	4.4
 Denmark	1004	46.2	39.2	12.8	1.7
 Germany	2000	51.9	33.9	12.2	2
 Estonia	512	36.4	14	34.8	14.7
 Greece	1008	58.1	31.6	9.1	1.2
 Spain	1506	52	29.3	16.5	2.2
 France	1505	61.7	27.4	9.9	1.1
 Ireland	1000	56.9	36.5	4.8	1.7
 Italy	1507	51.4	23.6	17.7	7.3
 Cyprus	501	55.2	28.2	15.1	1.5
 Latvia	503	50.4	25.8	17.2	6.6
 Lithuania	503	49.2	21.8	17.8	11.3
 Luxembourg	503	59.7	31.7	7	1.6
 Hungary	1013	61	14.9	19.4	4.6
 Malta	504	60.2	23.2	14.2	2.4
 Netherlands	1000	43.6	28.3	26.1	2.1
 Austria	1002	54.9	30.6	12	2.5
 Poland	1515	53.6	23	17.9	5.4
 Portugal	1001	52	24.8	18.3	4.9
 Romania	1008	51.2	15.8	26.9	6
 Slovenia	503	59.7	34.8	3.5	2
 Slovakia	1014	58.8	16.9	19	5.3
 Finland	1009	49.6	29.7	18	2.7
 Sweden	1000	45.6	42.4	9.2	2.8
 United Kingdom	1501	59.4	31.4	7.2	2

Table 19b. Preferred holiday destinations – *by segment*

QUESTION: Q17. What type of holiday destinations do you prefer?






	Total N	% Traditional, well-known destinations	% Non-traditional, emerging destinations	% Not important, no preference	% DK/NA
EU27	27127	53.8	27.8	14.6	3.9
 SEX					
Male	13115	52.9	29.1	14.9	3.2
Female	14012	54.7	26.5	14.3	4.5
 AGE					
15 - 24	4064	47.1	35.5	15	2.4
25 - 39	6202	53.5	28.5	15.8	2.2
40 - 54	7245	55.3	28	14.2	2.5
55 +	9323	55.9	23.6	13.9	6.6
 EDUCATION (end of)					
Until 15 years of age	4433	57.2	20.2	14.7	7.9
16 - 20	11798	56.7	25.4	14.5	3.4
20 +	7410	50	34.4	13.4	2.2
Still in education	2710	46.8	35	15.8	2.4
 URBANISATION					
Metropolitan	3352	49.4	31.4	15.6	3.7
Urban	13447	54.6	27.4	14.7	3.3
Rural	10055	54.5	27.1	13.9	4.4
 OCCUPATION					
Self-employed	2568	49.8	33.2	14.6	2.4
Employee	8474	54.1	31	13.4	1.6
Manual worker	2247	56.4	23.8	17	2.8
Not working	13601	54	25.4	14.9	5.7

Table 20a. The main expectation from a non-tradition, emerging destination – *by country*

QUESTION: Q18. 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
 EU27	27127	9.9	16.8	19.4	33	10	10.9
COUNTRY							
 Belgium	1002	7.4	13	13.4	32.4	8.1	25.8
 Bulgaria	1002	8.8	20.4	19.6	15.4	6.6	29.2
 Czech Rep.	1001	19.8	22.3	13.2	28.2	5.5	11
 Denmark	1004	10.3	15	10.9	49.7	6.4	7.7
 Germany	2000	9.1	10.4	23.4	35.3	12.4	9.3
 Estonia	512	7.2	16.3	22.3	28.5	6.4	19.3
 Greece	1008	19.4	17.6	11.4	27	19.7	5
 Spain	1506	7.8	11.8	22.5	41.1	7.8	9
 France	1505	7.9	18.8	18.2	36.7	11.1	7.3
 Ireland	1000	10.6	12.6	27.9	39	6.8	3.1
 Italy	1507	9.2	13.5	19.1	27	13.9	17.4
 Cyprus	501	18	13.5	7.2	41.6	12.2	7.5
 Latvia	503	8.6	19.8	13	39.1	6.2	13.3
 Lithuania	503	6.2	30.9	18.6	20.5	7.2	16.6
 Luxembourg	503	6.9	9.1	14.1	45.8	17.3	6.7
 Hungary	1013	6.9	35	16.7	18.4	13.7	9.2
 Malta	504	10.2	14.4	14.5	35.1	11.3	14.5
 Netherlands	1000	11.9	11.7	14.1	44.1	5.5	12.8
 Austria	1002	7.2	8.5	22.7	39.2	10.4	12
 Poland	1515	7.5	38.1	13.3	17.4	9	14.7
 Portugal	1001	6.7	19.1	18.2	37	8.8	10.2
 Romania	1008	21	31.6	17	9.3	7.7	13.4
 Slovenia	503	14	18.2	7.2	36.8	14.4	9.4
 Slovakia	1014	15.2	19.2	24.9	26.2	6.1	8.5
 Finland	1009	8.8	13.2	11.5	48.8	9.5	8.2
 Sweden	1000	7.4	6.5	13.2	48.1	12.6	12.1
 United Kingdom	1501	10.7	11.6	24.8	41.9	6.1	4.9

Table 20b. The main expectation from a non-tradition, emerging destination – *by segment*

QUESTION: Q18. 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
EU27	27127	9.9	16.8	19.4	33	10	10.9
 SEX							
Male	13115	10.6	16.3	20.7	32.4	9.6	10.4
Female	14012	9.1	17.4	18.1	33.5	10.4	11.4
 AGE							
15 - 24	4064	11.3	20	20.5	32.2	9.5	6.5
25 - 39	6202	11	18.5	19.9	33.8	9.8	7.1
40 - 54	7245	9.2	15.7	21.3	36.2	9.7	7.9
55 +	9323	8.9	15.5	17.3	30.2	10.6	17.5
 EDUCATION (end of)							
Until 15 years of age	4433	8.5	20	20.1	23	9.9	18.5
16 - 20	11798	10.6	18.7	21.1	30.5	9.3	9.8
20 +	7410	9.5	10.7	16.8	43.9	10.9	8.2
Still in education	2710	10.2	19.4	19.5	33.5	11	6.4
 URBANISATION							
Metropolitan	3352	9.8	13.4	18	36.9	11.9	10
Urban	13447	10.6	17.4	18.3	33.7	9.6	10.4
Rural	10055	8.9	17.4	21.2	30.9	10.1	11.6
 OCCUPATION							
Self-employed	2568	10.6	10.9	18.3	39.3	11	9.9
Employee	8474	9.2	13.7	20.8	40.5	9.6	6.1
Manual worker	2247	10.5	26.9	20.7	24.9	8.8	8.2
Not working	13601	10.1	18.2	18.5	28.5	10.3	14.3

Table 21a. The most important information source when make a decision about travel plans – *by country*

QUESTION: Q19A. From the following information source, which one do you consider to be the most important when you make a decision about your travel/holiday 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
 EU27	27127	18.8	29.3	4.8	5.4	21.9	11.4	3.2	5.1
COUNTRY									
 Belgium	1002	13.7	24.7	5	8	22.2	11.3	1	14.1
 Bulgaria	1002	34.1	24	1	2.4	11.1	2.1	2.5	22.8
 Czech Rep.	1001	29.2	28.2	4.5	10.1	15.9	6.6	1.6	4
 Denmark	1004	14.9	21	5.4	10.5	36.3	5.4	4.7	1.9
 Germany	2000	14.8	27	6.8	5.8	23.4	15	4.4	2.7
 Estonia	512	17.8	34.1	2.4	3	18	11.6	4.4	8.7
 Greece	1008	17.8	33.7	8.3	3.7	19.5	10	4.7	2.5
 Spain	1506	13.3	28.6	3	4.2	19.9	23.2	2.3	5.5
 France	1505	18.3	29.8	4.6	8.5	23.8	10.3	1.9	2.9
 Ireland	1000	16.7	41.9	5.4	2.7	22.8	3.8	5.1	1.6
 Italy	1507	19.1	22.3	3.1	3.3	20.7	19.7	3.1	8.8
 Cyprus	501	15.2	22.7	7	4.8	24.7	17.1	5.3	3.3
 Latvia	503	30.5	36.2	2.5	1.3	15.5	2.5	3.1	8.5
 Lithuania	503	30.5	40.3	2.8	0.8	11.2	3.8	1	9.6
 Luxembourg	503	13.4	24.9	6.7	6.5	29	11.5	5.9	2.1
 Hungary	1013	27.2	37.7	5.2	5.6	11.4	2.8	3	7.1
 Malta	504	12.8	20.2	6.3	6.1	27.9	13.6	8.6	4.5
 Netherlands	1000	15.5	17.5	5.9	4.9	43	8.4	1.9	2.8
 Austria	1002	13.7	27	7.2	7.6	23.5	13.4	3.2	4.4
 Poland	1515	28	38.5	4.8	2.3	15.1	3.5	2.3	5.5
 Portugal	1001	21.8	33.7	2.7	2.1	16.7	11.4	1.5	10.1
 Romania	1008	27.4	29.2	3.1	2	13	7.7	6.9	10.8
 Slovenia	503	22.6	35.6	3.8	7.8	16.7	9.1	2.6	1.8
 Slovakia	1014	21.5	38.8	2.3	8.7	14.5	9.2	2.1	3
 Finland	1009	13.9	21.2	4.8	8.1	38.9	5.9	4.9	2.1
 Sweden	1000	14.5	32.8	5.5	8.1	27.5	4.2	5.1	2.4
 United Kingdom	1501	16.8	34.2	5.9	7.3	26	4.7	3.3	1.8

Table 21b. The most important information source when make a decision about travel plans – *by segment*

QUESTION: Q19A. From the following information source, which one do you consider to be the most important when you make a decision about your travel/holiday 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
EU27	27127	18.8	29.3	4.8	5.4	21.9	11.4	3.2	5.1
 SEX									
Male	13115	19.7	29.6	4.6	5	24.4	9.1	3.3	4.3
Female	14012	17.9	29	5	5.8	19.6	13.6	3.1	5.9
 AGE									
15 - 24	4064	17	31.7	3.4	2.9	29	10.2	3.6	2.1
25 - 39	6202	15.9	32.5	3.7	4.1	31.1	9	1.8	1.8
40 - 54	7245	18.6	29.9	5.1	4.9	24.6	10.5	3.3	3.1
55 +	9323	21.6	25.8	5.9	7.6	10.9	14.3	3.8	10
 EDUCATION (end of)									
Until 15 years of age	4433	20.1	26.8	3.3	6.8	9.4	17.6	3.7	12.4
16 - 20	11798	19.5	30.8	4.8	5.9	21.1	11.2	2.9	3.7
20 +	7410	17.3	29	6.6	4.8	28.1	8.3	3	2.9
Still in education	2710	16.7	29.5	2.6	2.9	31.7	10.5	4.1	1.9
 URBANISATION									
Metropolitan	3352	18.9	30.6	4.3	4.3	25.7	8.6	3	4.5
Urban	13447	18.8	28.9	4.8	5.7	22.8	11.6	3	4.3
Rural	10055	18.8	29.6	5	5.5	19.6	12	3.4	6
 OCCUPATION									
Self-employed	2568	18	31.9	5.9	4	27.7	6.6	2.5	3.4
Employee	8474	15.5	31.5	5	5.1	30.2	8.6	2.7	1.4
Manual worker	2247	22.6	35.4	4.2	4.7	16.1	10.9	3.1	3
Not working	13601	20.2	26.6	4.6	6.1	16.7	14.2	3.6	8

Table 22a. The second most important information source when make a decision about travel plans – *by country*

QUESTION: Q19B. And what is the second most important?





























	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
 EU27	25742	12.7	29.1	7.5	9.1	17.4	11.3	6.1	6.9
COUNTRY									
 Belgium	860	14.1	27.4	4.7	10.8	17.4	14.3	4.9	6.4
 Bulgaria	773	10.7	39	3.7	5.3	15.7	9.5	9.8	6.2
 Czech Rep.	961	13.4	37.2	6	12.2	14.3	6.8	4	6
 Denmark	985	15	27.4	8.5	12.9	17.2	8	9	2.1
 Germany	1946	12.8	29	8	8.9	18.5	12.3	7.8	2.6
 Estonia	467	18.8	32.8	5	4.4	17.6	10.9	6.2	4.3
 Greece	983	13.6	31	9.8	5.9	14.2	7.7	8.2	9.5
 Spain	1424	10.6	25.4	3.4	9.1	19	17.6	2.8	12.1
 France	1462	10.4	27.7	7.4	12	18.6	11.3	4.1	8.5
 Ireland	984	15.7	27.1	8.8	8.9	20.1	8.3	8.9	2.2
 Italy	1375	9.8	23.1	7.2	9.6	16.2	13.9	4.9	15.2
 Cyprus	485	12	30.6	10.7	9.4	11.9	13.9	6.8	4.9
 Latvia	460	17.3	32.8	6.8	4.6	18.1	7.1	6	7.3
 Lithuania	455	13.3	29.7	5.6	2.7	20.6	10.2	8.7	9.1
 Luxembourg	493	12.9	28.4	10.2	11.5	15.1	12.6	7.3	2
 Hungary	941	19.7	34.1	10	9.8	8.5	6.1	7.4	4.4
 Malta	481	9.1	21	11	13.4	16	14.3	9.3	5.9
 Netherlands	972	12.1	30.2	8.1	9.9	18.9	8.9	5.6	6.3
 Austria	958	7.6	28.5	7.5	9	20.6	18.4	5.6	2.7
 Poland	1432	16.8	34.6	8.6	6.2	17.8	6.4	4.3	5.4
 Portugal	900	21.7	29.1	5.4	2.4	17.9	8.9	4.6	10
 Romania	899	13.8	34.7	8.6	4.7	11.5	10.6	9.1	7
 Slovenia	494	11.3	28.7	6.8	12.1	17.6	14	6.1	3.3
 Slovakia	984	20.3	30.5	3.9	11.1	11.2	11.4	6	5.6
 Finland	988	11.5	30.3	6.7	13.3	17.3	8.5	9.4	3
 Sweden	976	12.2	29.3	7.7	11.1	20.4	7.3	8.2	3.9
 United Kingdom	1474	12.8	30.3	9.4	9.5	17.7	9.2	8.4	2.6

Table 22b. The second most important information source when make a decision about travel plans – *by segment*

QUESTION: Q19B. And what is the second most important?






	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
EU27	25742	12.7	29.1	7.5	9.1	17.4	11.3	6.1	6.9
 SEX									
Male	12550	12.5	29.2	6.9	8.9	18.9	10.4	6.7	6.5
Female	13191	12.9	29.1	8	9.3	15.9	12.1	5.6	7.2
 AGE									
15 - 24	3976	12.7	31.2	5.2	7.4	21.9	11.4	5.9	4.4
25 - 39	6091	11.4	30.7	6.8	7.6	23.2	10.5	5.3	4.5
40 - 54	7021	12	29.4	8.2	8.6	18.7	11.7	6.5	4.9
55 +	8391	14	26.7	8.4	11.5	10	11.4	6.6	11.3
 EDUCATION (end of)									
Until 15 years of age	3882	13.7	27.2	6.6	10.2	9.4	13.5	6.1	13.2
16 - 20	11357	12.8	29.8	7.1	9.3	17.1	12.1	5.6	6.1
20 +	7195	11.7	28.7	9.5	8.8	20.5	9	7.2	4.5
Still in education	2659	12.3	31.6	5.3	7.7	23.2	10.5	5.5	4
 URBANISATION									
Metropolitan	3200	12.6	29.6	8	7.8	19.8	10.9	5	6.2
Urban	12870	12.3	28.9	7.4	9.2	17.6	11.2	6.4	7
Rural	9448	13.2	29.4	7.4	9.4	16.4	11.4	6.2	6.7
 OCCUPATION									
Self-employed	2480	13.5	28.3	8	8	19	11.1	7.3	4.8
Employee	8359	11.4	30.7	8	8.9	21.2	10.6	5.7	3.6
Manual worker	2180	12.9	29.6	5	7.3	20.8	11.8	5.2	7.5
Not working	12508	13.4	28.4	7.4	9.8	13.9	11.7	6.4	9

Table 23a. Attractions that have the major influence on choice of destination – *by country*

QUESTION: Q20. 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
 EU27	27127	5.2	6.7	15.2	24	4.9	30.6	7.6	5.8
COUNTRY									
 Belgium	1002	3.9	11.9	14.9	25.5	4.3	19.8	6.1	13.7
 Bulgaria	1002	2.2	2.2	18.5	13.9	3.1	24	8.5	27.6
 Czech Rep.	1001	5.2	7.7	26.3	19.6	1.2	19.2	15	5.7
 Denmark	1004	6.4	4.4	10.6	41.3	6	16.7	11.4	3.1
 Germany	2000	3.1	4.2	6.9	20.7	3.5	53.1	5	3.5
 Estonia	512	3	1	20.2	27.3	4.4	21.4	13.1	9.7
 Greece	1008	4.1	2.6	18.8	25.5	4.3	40.8	1.8	2.1
 Spain	1506	9.3	10.2	18.6	27.3	4.4	17.5	7.8	4.9
 France	1505	5.1	11.3	18.3	22.6	4.8	31.2	3.9	2.8
 Ireland	1000	3.4	4.7	22.6	33.1	9.6	12.4	12.7	1.4
 Italy	1507	11	8.4	9.9	23.6	4.4	28.3	4.4	10
 Cyprus	501	5.4	3.1	29.7	31.5	3.1	22.8	2.2	2.1
 Latvia	503	2.9	1.7	14.7	23.2	4	37.5	6.7	9.4
 Lithuania	503	2.9	2.4	14.4	19.6	5.4	41.4	4.2	9.9
 Luxembourg	503	4	10.5	12.7	27.3	3.7	35.6	3.7	2.5
 Hungary	1013	4.1	2.1	14.2	17.3	8.3	40.2	9.2	4.7
 Malta	504	6.1	2.8	25	31.3	2	23.8	4.4	4.6
 Netherlands	1000	3.9	9.4	14.5	30.5	5.6	11	21.4	3.8
 Austria	1002	3.6	6.1	8.1	24.1	3.7	46	4.5	3.9
 Poland	1515	3.7	4.8	17.8	16.6	5.6	36.8	8	6.7
 Portugal	1001	4.3	6.2	12.5	30.6	6.2	22	7.5	10.6
 Romania	1008	5.4	2.9	17.7	16.3	7.3	29	4.5	16.9
 Slovenia	503	4.4	6.9	15.1	29.1	2.9	38.4	1.7	1.4
 Slovakia	1014	5.2	8	18.4	26.1	7.6	21.4	9.2	4
 Finland	1009	3.8	5.9	9.4	28.2	5.3	37	8	2.2
 Sweden	1000	2.8	7.1	9.7	31.2	4.9	29.4	12.8	2
 United Kingdom	1501	2.5	5	23.1	31.7	6.1	14.9	14.3	2.3

Table 23b. Attractions that have the major influence on choice of destination – *by segment*

QUESTION: Q20. 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
EU27	27127	5.2	6.7	15.2	24	4.9	30.6	7.6	5.8
 SEX									
Male	13115	4.2	7.9	16.9	22.7	5.6	29.8	7.9	5
Female	14012	6.1	5.6	13.5	25.3	4.2	31.4	7.3	6.6
 AGE									
15 - 24	4064	4.8	4.6	31.6	14.9	10.8	25.1	4.9	3.3
25 - 39	6202	4.2	7.5	19.5	22.3	5.7	30	7.3	3.6
40 - 54	7245	4.7	6.8	12.1	25.9	3.9	34.2	8.4	4
55 +	9323	6.4	7	7.6	27.5	2.6	30.8	8.4	9.7
 EDUCATION (end of)									
Until 15 years of age	4433	5	7.7	12.4	21.3	3.3	29.3	8.2	12.7
16 - 20	11798	4.4	7.3	15.2	22.3	5.4	32.5	8.1	4.9
20 +	7410	6.6	5.8	11.3	31.8	3.4	31.3	6.9	3
Still in education	2710	5.2	3.8	31.2	16.4	9.6	25.1	5.7	3.1
 URBANISATION									
Metropolitan	3352	5.8	6.4	13.9	26.5	5.7	30.2	6.7	4.8
Urban	13447	5.5	6.5	16.3	25	4.5	29.2	7.9	5.1
Rural	10055	4.5	7.1	14.1	21.8	5.2	33	7.4	6.8
 OCCUPATION									
Self-employed	2568	5.5	7.7	11.6	26.2	4.2	31.8	8.6	4.4
Employee	8474	4.5	6.3	15	27.2	4	32.3	8.1	2.6
Manual worker	2247	3.3	8.8	21.8	16.5	6.8	31.2	7.2	4.3
Not working	13601	5.8	6.3	14.9	22.8	5.3	29.3	7.2	8.3

Table 24a. Holiday plans for 2009 – *by country*

QUESTION: Q21. What kind of holidays are you planning in 2009?





























	Total N	% A holiday with more than 13 consecutive nights	% A holiday with more than four consecutive nights	% A combination of longer holidays and shorter trips	% Short- stay trip(s) (1 - 3 nights) only	% No decision yet	% No trip at all	% DK/NA
 EU27	27127	15.1	17.9	9.7	7.4	28.2	19.2	2.6
COUNTRY								
 Belgium	1002	15.9	21.3	5.4	6.4	27.1	14.8	9.1
 Bulgaria	1002	4.9	14.9	3.5	7.1	24.4	35.3	9.9
 Czech Rep.	1001	12	23.5	9.5	5.4	17.8	29.7	2
 Denmark	1004	24.5	25.8	8.3	5.3	23.1	12.1	1
 Germany	2000	19.3	18.8	13.8	8.6	25.1	13.7	0.6
 Estonia	512	8.8	19.1	5.1	12.5	32	13.2	9.2
 Greece	1008	13	27.5	12.6	14.8	21.8	9.3	1.1
 Spain	1506	14.6	17.1	5.1	6.6	32.6	22.1	1.9
 France	1505	21	19.5	6.8	4.4	27.3	20	0.9
 Ireland	1000	13.1	20.6	13.1	8	34.6	10.3	0.3
 Italy	1507	11.8	12.1	4.2	4.4	39.3	21.1	7.2
 Cyprus	501	8.4	32.1	4.3	9.5	34.7	9.8	1.1
 Latvia	503	6.6	12.9	2.3	20.4	25	30.4	2.4
 Lithuania	503	5	9.4	4.3	10.9	38.5	28.6	3.4
 Luxembourg	503	24.2	21.7	14.6	5.3	23.8	8.8	1.5
 Hungary	1013	5	7.4	8.5	10.4	19.3	46.3	3
 Malta	504	8.2	20.9	1.2	6.6	21.6	40.1	1.4
 Netherlands	1000	18.6	15.8	22.2	5.3	29.1	7.8	1.1
 Austria	1002	14.6	22.8	15.6	14	17.5	14	1.6
 Poland	1515	16	16.4	6	7.3	25.7	23.7	4.9
 Portugal	1001	10.4	7.8	2.5	2.8	38.3	35.2	2.9
 Romania	1008	6.9	19.2	4.2	10	24	33.1	2.6
 Slovenia	503	11.6	31.7	18.8	10.6	16.1	10.1	1.1
 Slovakia	1014	9.5	19.6	2.7	7.5	25.6	31.7	3.4
 Finland	1009	9.2	21.4	19.7	20	23.2	5.8	0.6
 Sweden	1000	13.8	23.1	17.8	13.5	23.5	7.3	1
 United Kingdom	1501	14.7	19.9	17.6	7.7	28.2	11.6	0.3

Table 24b. Holiday plans for 2009 – *by segment*

QUESTION: Q21. What kind of holidays are you planning in 2009?






	Total N	% A holiday with more than 13 consecutive nights	% A holiday with more than four consecutive nights	% A combination of longer holidays and shorter trips	% Short- stay trip(s) (1 - 3 nights) only	% No decision yet	% No trip at all	% DK/NA
EU27	27127	15.1	17.9	9.7	7.4	28.2	19.2	2.6
 SEX								
Male	13115	16.3	17.8	10.6	7.5	28.6	16.8	2.4
Female	14012	14	17.9	8.9	7.3	27.8	21.4	2.7
 AGE								
15 - 24	4064	14.4	20.3	11.4	9.8	33.5	7.2	3.5
25 - 39	6202	15.3	19.2	9.9	7.8	30.9	15.5	1.5
40 - 54	7245	14.6	18.5	10.8	6.8	28.8	18.7	1.9
55 +	9323	15.6	15.6	7.9	6.7	23.7	27.3	3.3
 EDUCATION (end of)								
Until 15 years of age	4433	11.3	13.5	4.5	5.2	24.6	36.1	4.8
16 - 20	11798	14.6	18.3	8	7.8	29.4	20	1.8
20 +	7410	18.6	19.8	15.1	7.4	26.8	10.8	1.7
Still in education	2710	14.3	19.7	13	10	33.7	5.8	3.5
 URBANISATION								
Metropolitan	3352	17.6	17.7	12.3	7.1	26.8	15.2	3.2
Urban	13447	16.2	17.6	9.7	7	29.4	17.7	2.4
Rural	10055	12.8	18.4	9	8.1	27	22.5	2.2
 OCCUPATION								
Self-employed	2568	17	18.5	12.6	7.9	26.8	15.8	1.4
Employee	8474	17.2	21.8	13.5	7.2	28.6	10.6	1.2
Manual worker	2247	11.5	18.5	5.1	7.9	32.2	22	2.9
Not working	13601	13.9	15.1	7.7	7.4	27.7	24.7	3.5

Table 25a. Having the necessary financial resources for the planned holidays – *by country*

QUESTION: Q22. Will you have the necessary financial resources to be able to afford to take your planned holidays in 2009?

Base: those who are planning a holiday





























	Total N	% Yes, without any major difficulties	% Yes, but we will need to make extra savings	% No, not without going into debt	% No, I cannot afford given the current financial situation	% DK/NA
 EU27	21921	41.1	38	3.3	8.3	9.3
COUNTRY						
 Belgium	853	52.1	21.1	2.1	5.5	19.1
 Bulgaria	648	16.5	40.1	5.3	12	26.1
 Czech Rep.	703	36.2	42.4	7.4	6.1	8
 Denmark	882	61.9	19.6	10.6	2.6	5.3
 Germany	1726	51.7	35.5	1.5	6.3	4.9
 Estonia	445	21.2	38.4	3	19.1	18.3
 Greece	915	31.8	46.5	2.7	12.5	6.6
 Spain	1173	37.2	39.8	5.7	10.4	7
 France	1204	40.7	44.5	2.6	6.2	6
 Ireland	897	37.7	39.1	4.5	12.3	6.5
 Italy	1189	29.4	40.1	2.6	11.4	16.5
 Cyprus	452	44.2	31.5	2.7	11.3	10.3
 Latvia	350	27.1	33.3	7.9	18.9	12.8
 Lithuania	359	18.6	47.5	6	9	19
 Luxembourg	459	62	29.3	0.5	4.9	3.2
 Hungary	544	22.1	48.7	4	13.6	11.6
 Malta	302	30.5	40.7	3.6	14.8	10.4
 Netherlands	922	65.7	22.7	2.9	3	5.7
 Austria	861	60.2	29.5	0.6	3.7	6
 Poland	1157	28.7	40.3	4.4	8.2	18.5
 Portugal	648	29.6	47	5.9	7.3	10.2
 Romania	675	22.9	45.8	6.9	16.9	7.5
 Slovenia	452	43.2	46.4	3.3	2.8	4.3
 Slovakia	693	25.8	45.1	4.8	9.6	14.7
 Finland	950	69.4	21.4	1.4	4.2	3.5
 Sweden	927	62.4	24.1	0.7	7.2	5.7
 United Kingdom	1327	44.4	36.4	3.2	8.1	7.8

Table 25b. Having the necessary financial resources for the planned holidays – *by segment*

QUESTION: Q22. Will you have the necessary financial resources to be able to afford to take your planned holidays in 2009?

Base: those who are planning a holiday






	Total N	% Yes, without any major difficulties	% Yes, but we will need to make extra savings	% No, not going into debt	% No, I cannot afford given the current financial situation	% DK/NA
EU27	21921	41.1	38	3.3	8.3	9.3
 SEX						
Male	10913	45.7	35.3	3.3	7.3	8.5
Female	11008	36.6	40.6	3.4	9.3	10.1
 AGE						
15 - 24	3772	34.6	42.1	3.6	8.1	11.6
25 - 39	5244	33.8	44.9	4.4	9.2	7.7
40 - 54	5893	41.7	37.4	3.5	8.5	8.9
55 +	6782	49.7	31.1	2.3	7.6	9.3
 EDUCATION (end of)						
Until 15 years of age	2832	35.5	37.4	3.9	11.8	11.4
16 - 20	9433	38.8	39.4	3.3	9.6	8.8
20 +	6609	49.8	35.3	3	5.3	6.6
Still in education	2552	35.1	40.3	3.7	7.3	13.7
 URBANISATION						
Metropolitan	2841	44.8	34.8	3.7	6.5	10.1
Urban	11067	39.8	39.8	3.6	7.9	9
Rural	7793	42.2	36.6	2.9	9.5	8.9
 OCCUPATION						
Self-employed	2163	50.7	33.4	2.9	5.2	7.9
Employee	7579	44.9	40	3.1	5.7	6.3
Manual worker	1754	28.2	44.6	4.9	12.9	9.3
Not working	10242	38.8	36.4	3.3	10.1	11.4

Table 26a. Planned destination of the main holiday in 2009 – *by country*

QUESTION: Q23. Where do you plan to spend your main holiday in 2009 ?

Base: those who are planning a holiday


































	Total N	% Resident country	% EU27	% EFTA	% EU Candidate countries	% Other European countries	% North America	% Asia	% Africa	% Pacific	% Middle and South America	% Other country	% DK/NA
 EU27	21921	41.3	20.5	1	2.9	0.6	2.6	2	2.5	0.6	1.6	10.5	13.9
COUNTRY													
 Belgium	853	28.4	36.9	1	3.1	0.1	1.4	1.4	2.8	0.3	1.2	11.9	11.4
 Bulgaria	648	54	8	0.7	2.4	0.1	0.2	0.4	0.1	0	0.1	4.6	29.2
 Czech Rep.	703	29	30.2	1	11.2	0.7	0.7	0.9	3.9	0.5	0.9	6.9	14
 Denmark	882	17	34.4	3.6	3	2	4.7	3	3.3	0.7	1.5	9.6	17.4
 Germany	1726	27	30.8	2.1	5.3	0.8	2.3	2.6	2.2	0.5	0.8	10.6	15.2
 Estonia	445	40.3	23.5	2.7	3.1	6.3	0.9	2.2	0.9	0.2	0.4	6.9	12.5
 Greece	915	82.5	8.2	0.4	0.4	0.5	1.2	0.6	0	0.1	0.2	1.4	4.4
 Spain	1173	68.8	9.9	0.7	0.4	0.4	1	0.8	1.1	0.1	5.2	8.1	3.5
 France	1204	43.6	10.9	0.5	0.9	0.5	2.9	2.9	6.1	0.2	2.6	14.5	14.4
 Ireland	897	12.2	40.5	0.2	1.2	0.1	10.9	2	1.9	2.9	1.3	5.2	21.7
 Italy	1189	61.7	12.8	0.4	0.5	0.7	2.1	1.4	1.3	0.6	1.3	8.2	9.1
 Cyprus	452	24.7	49.8	0.4	0	0.9	6.2	2	0	0.7	0.5	5	9.9
 Latvia	350	23.5	29.8	0.9	1.5	6.9	1.4	2	1	0.3	0.3	7.9	24.6
 Lithuania	359	38.3	12.7	1.3	3.4	3	1.6	0.8	3.7	0.2	1	6.9	27.3
 Luxembourg	459	5	52.4	1.8	0.7	2.1	2.4	3.6	3.5	0.2	1.3	12.2	14.8
 Hungary	544	46.8	15.5	0.3	2.4	0	0.5	0.5	0.2	0	0	3.1	30.6
 Malta	302	12	53.8	1.4	0.8	0.6	3.3	2.5	2.7	0.8	1.1	5.8	15.1
 Netherlands	922	17	37	2.4	4.4	0.3	1.7	1.6	2.5	0.5	0.8	16.3	15.5
 Austria	861	24.2	36.4	1.7	7.6	0.8	1.4	2.4	4	0.9	1.8	3.8	15
 Poland	1157	59.5	12.9	0.2	4.2	0.8	0.5	0.7	2.3	0	0.6	5.9	12.4
 Portugal	648	59.3	9	0.4	0.1	0.1	0.5	0.2	1.7	0	5.2	13.7	9.7
 Romania	675	30.3	15.2	0.1	1.8	0.4	0.9	0.3	0.5	0.2	0	37.6	12.7
 Slovenia	452	14.7	10.7	0.5	25.2	0.5	0.5	0.1	1.1	0	0.2	24.1	22.6
 Slovakia	693	27.5	30.6	0.4	13.9	0.1	0.9	0.8	4.8	0	0.7	8.2	12.1
 Finland	950	46.1	17.7	1.2	1.1	0.7	1.5	3.7	1	0.7	0.2	10.1	15.8
 Sweden	927	39.4	21.4	2.2	3.3	0.2	2.5	4.3	0.8	0.4	1.2	9	15.2
 United Kingdom	1327	23	25.9	1.1	2.5	0.1	7.4	3.4	3.5	2.3	1.7	8.7	20.5

Table 26b. Planned destination of the main holiday in 2009 – *by segment*

QUESTION: Q23. Where do you plan to spend your main holiday in 2009 ?

Base: those who are planning a holiday

	Total N	% Resident country	% EU27	% EFTA	% EU Candidate countries	% Other European countries	% North America	% Asia	% Africa	% Pacific	% Middle and South America	% Other country	% DK/NA
EU27	21921	41.3	20.5	1	2.9	0.6	2.6	2	2.5	0.6	1.6	10.5	13.9
 SEX													
Male	10913	41.1	20.4	1	2.7	0.6	2.8	2.3	2.6	0.7	1.8	11	12.9
Female	11008	41.4	20.5	1.1	3.2	0.5	2.4	1.7	2.4	0.5	1.4	10	14.8
 AGE													
15 - 24	3772	36.9	25.9	1	3.1	0.7	2.9	1.7	2.3	0.4	1.6	9.9	13.4
25 - 39	5244	38.9	19.2	0.4	3.9	0.5	3.3	2.3	3.3	0.4	2.7	10.8	14.4
40 - 54	5893	41.2	20.2	1.4	3.3	0.6	1.7	2.3	2.4	0.5	1.4	10.2	14.8
55 +	6782	46	18.6	1.3	1.8	0.6	2.5	1.6	2.2	0.9	1	11	12.5
 EDUCATION (end of)													
Until 15 years of age	2832	53.3	15.2	0.9	2	0.5	2	1	1.5	1.3	1.1	9.6	11.7
16 - 20	9433	42	20.2	1	3.4	0.4	2	1.7	2.5	0.4	1.6	10.9	13.9
20 +	6609	36.5	21.1	1.2	2.6	0.6	3.3	2.9	3.4	0.8	2.1	11	14.4
Still in education	2552	36.5	26.4	1	2.9	1	3.4	1.9	2	0.5	1.3	9.1	14
 URBANISATION													
Metropolitan	2841	38.7	20.1	1	3	0.9	2.6	2.6	3.3	0.2	2.2	9.7	15.6
Urban	11067	41.9	20.6	1	2.9	0.6	2.6	2	2.8	0.6	1.9	10	13
Rural	7793	41.3	20.8	1.2	2.9	0.4	2.5	1.6	1.9	0.8	1	11.5	14.1
 OCCUPATION													
Self-employed	2163	37.9	20.9	1.1	2.8	1	2.9	3.2	2.9	1	3.1	9.6	13.6
Employee	7579	36.7	21.8	1.1	3.6	0.4	3	2.6	2.6	0.6	2	10.7	14.9
Manual worker	1754	43.6	16.9	0.7	2.7	0.7	1	1.3	4.6	0.5	1.5	11.8	14.8
Not working	10242	44.9	20.1	1.1	2.5	0.5	2.6	1.3	2.1	0.6	1.1	10.3	12.9

II. Survey details

This general population survey “*Survey on the Attitudes of Europeans towards Tourism*”(No 258) was conducted for the European Commission, Enterprise and Industry Directorate General – New Approach Industries, Tourism & CSR.

Telephone interviews were conducted in each country, with the exception of the Bulgaria, Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania and Slovakia 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.

Telephone interviews were conducted in each country between the 14/02/2009 and the 18/02/2009 by the following institutes:

Belgium	BE	Gallup Europe	(Interviews: 14/02/2009 - 18/02/2009)
Czech Republic	CZ	Focus Agency	(Interviews: 14/02/2009 - 18/02/2009)
Denmark	DK	Hermelin	(Interviews: 14/02/2009 - 18/02/2009)
Germany	DE	IFAK	(Interviews: 14/02/2009 - 18/02/2009)
Estonia	EE	Saar Poll	(Interviews: 14/02/2009 - 18/02/2009)
Greece	EL	Metroanalysis	(Interviews: 14/02/2009 - 18/02/2009)
Spain	ES	Gallup Spain	(Interviews: 14/02/2009 - 18/02/2009)
France	FR	Efficience3	(Interviews: 14/02/2009 - 18/02/2009)
Ireland	IE	Gallup UK	(Interviews: 14/02/2009 - 18/02/2009)
Italy	IT	Demoskopoea	(Interviews: 14/02/2009 - 18/02/2009)
Cyprus	CY	CYMAR	(Interviews: 14/02/2009 - 18/02/2009)
Latvia	LV	Latvian Facts	(Interviews: 14/02/2009 - 18/02/2009)
Lithuania	LT	Baltic Survey	(Interviews: 14/02/2009 - 18/02/2009)
Luxembourg	LU	Gallup Europe	(Interviews: 14/02/2009 - 18/02/2009)
Hungary	HU	Gallup Hungary	(Interviews: 14/02/2009 - 18/02/2009)
Malta	MT	MISCO	(Interviews: 14/02/2009 - 18/02/2009)
Netherlands	NL	MSR	(Interviews: 14/02/2009 - 18/02/2009)
Austria	AT	Spectra	(Interviews: 14/02/2009 - 18/02/2009)
Poland	PL	Gallup Poland	(Interviews: 14/02/2009 - 18/02/2009)
Portugal	PT	Consulmark	(Interviews: 14/02/2009 - 18/02/2009)
Slovenia	SI	Cati d.o.o	(Interviews: 14/02/2009 - 18/02/2009)
Slovakia	SK	Focus Agency	(Interviews: 14/02/2009 - 18/02/2009)
Finland	FI	Norstat Finland Oy	(Interviews: 14/02/2009 - 18/02/2009)
Sweden	SE	Hermelin	(Interviews: 14/02/2009 - 18/02/2009)
United Kingdom	UK	Gallup UK	(Interviews: 14/02/2009 - 18/02/2009)
Bulgaria	BG	Vitosh	(Interviews: 14/02/2009 - 18/02/2009)
Romania	RO	Gallup Romania	(Interviews: 14/02/2009 - 18/02/2009)

Representativeness of the results

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

Sample sizes

In most EU 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, Poland and 500 interviews in Estonia, Cyprus, Latvia, Lithuania, Luxembourg, Malta, Slovenia. The table below shows the achieved sample size by country.

A weighting factor was applied to the national results in order to compute a marginal total where each country contributes to the European Union result 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

	Total Interviews			
	Conducted	% of Total	EU27 weighted	% of Total (weighted)
Total	27127	100	27127	100
BE	1002	3.7	572	2.1
BG	1002	3.7	433	1.6
CZ	1001	3.7	573	2.1
DK	1004	3.7	288	1.1
DE	2000	7.4	4611	17.0
EE	512	1.9	74	0.3
EL	1008	3.7	623	2.3
ES	1506	5.6	2474	9.1
FR	1505	5.5	3359	12.4
IE	1000	3.7	224	0.8
IT	1507	5.6	3306	12.2
CY	501	1.8	42	0.2
LV	503	1.9	128	0.5
LT	503	1.9	185	0.7
LU	503	1.9	25	0.1
HU	1013	3.7	555	2.0
MT	504	1.9	22	0.1
NL	1000	3.7	872	3.2
AT	1002	3.7	456	1.7
PL	1515	5.6	2089	7.7
PT	1001	3.7	583	2.1
RO	1008	3.7	1187	4.4
SI	503	1.9	113	0.4
SK	1014	3.7	294	1.1
FI	1009	3.7	285	1.0
SE	1000	3.7	492	1.8
UK	1501	5.5	3263	12.0

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 Union results country by country.

VOLUME B: RESPONDENTS' DEMOGRAPHICS

The VOLUME B tables present the European Union 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.

III. Questionnaire

Q1. During 2008, 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 allIF 0, GO TO Q3A

[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

IF Q1 NOT EQ 0

Q3. Was this more, less or the same number of short trips that you took in 2007?

- Less 1
- Same 2
- More than in the previous year (2007) 3
- [DK/NA] 9

IF Q1 EQ 0

Q3A. Did you make a trip in 2007 where you were away from home for a minimum of one night?

- Yes 1
- No 2
- [DK/don't remember] 9

AFTER Q3A GO TO Q5

Q4. How many times did you go on holiday in 2008, 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 Q1=0 OR Q4=0 OR Q4=99

Q5. What was the main reason why you did not go on holiday in 2008?

- Personal/private reasons 1
- Financial reasons 2
- Lack of time 3
- Prefer to only make short-stay trips
[INSTRUCTOR:LESS THAN 4 NIGHTS] 4
- No motivation to take a holiday in 2008 5
- Concerns about safety 6
- Prefer to stay at home or with family / friends 7
- Other 8
- [DK/NA] 9

**[ASK IF Q1 NOT 0 OR Q4 NOT 0 OR Q4 NOT 99,
OTHERWISE GO TO Q11]**

Q6. What was the major motivation for your main holiday trip in 2008? (choose one)

- 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

Q7. Where did you travel for your main holiday in 2008? (if more than one place, where did you stay most of the time?)

[OPEN ENDED RESPONSE]

Q8. How did you travel there in 2008? (what was the main method of transport?)

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

Q9. In which month in 2008 did you start your main holiday trip?

- January	1
- February	2
- March	3
- April	4
- May.....	5
- June.....	6
- July	7
- August	8
- September.....	9
- October.....	10
- November	11
- December	12
- [DK/NA]	99

Q10. How did you organize your main holiday trip in 2008?

- 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

Q11. In 2008, did you spend more, less or the same amount of money for all your holidays compared to 2007?

- More	1
- Less	2
- Same	3
- [DK/NA]	9

Q12. Did changes in your cost of living have an impact on your 2008 travel /holiday plans?

- Yes	1
- No, no changes in cost of living	2
- No, no impact on travel plans.....	3
- [DK/NA]	9

Q12a. If yes: How did it impact your 2008 travel /holiday plans?

- It had an influence on how much I spent on travels	1
- It influenced the length of my trips/holidays	2
- It meant that I took no holidays at all	3
- [DK/NA]	9

Q13. If you had to make savings on your holiday budget, where would you save?

- On accommodation 1
- On the type of transportation 2
- On the destination (i.e. the distance I would consider travelling) 3
- On the timing of booking (e.g. a last-minute decision) 4
- On the timing of the holidays (low season)..... 5
- [DK/NA] 9

Q14. If you would have to make savings on your travel plans and holidays, what kind of holidays or trips would you be prepared to give up or to reduce first?

- Short-stay trips 1
- Winter holidays 2
- Summer holidays 3
- None (I would not give up any trip at all) 4
- [DK/NA] 9

Q15. When you are actually on holiday, what kind of leisure spending are you willing to reduce the most?

- 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

Q16. When you are deciding on a holiday trip, which of the following considerations are the most important in your decision-making?

- Quality of service 1
- Price 2
- Value for money 3
- Environmental considerations 4
- Social considerations 5
- Safety/security 6
- Other 7
- [DK/NA] 9

Q17. What type of holiday destinations do you prefer?

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

Q18. What would be your main expectation from a non-traditional, emerging destination?

- 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

Q19a. 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?

- 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

Q19b. And what is the second most important?

- 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

Q20. From the following attractions, please choose the one that has the major influence on your choice of destination?

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

Q21. What kind of holidays are you planning in 2009?

- A holiday with more than 13 consecutive nights 1
- A holiday with more than four consecutive nights..... 2
- A combination of longer holidays and shorter trips 3
- Short-stay trip(s) (1 - 3 nights) only 4
- No decision yet 5
- No trip at all --→ GO TO D1 6
- [DK/NA] 9

Q22. Will you have the necessary financial resources to be able to afford to take your planned holidays in 2009?

- Yes, without any major difficulties 1
- Yes, but we will need to make extra savings 2
- No, not without going into debt 3
- No, I cannot afford given the current financial situation..... 4
- [DK/NA] 9

Q23. Where do you plan to spend your main holiday in 2009?

[OPEN ENDED RESPONSE]

D1. Gender

[DO NOT ASK - MARK APPROPRIATE]

- [1].....Male
- [2].....Female

D2. How old are you?

[_][_] years old

[00].....[REFUSAL/NO ANSWER]

D3. How old were you when you stopped full-time education?

[WRITE IN THE AGE WHEN EDUCATION WAS TERMINATED]

[_][_].....years old

[00]..... [STILL IN FULL TIME EDUCATION]

[01].....[NEVER BEEN IN FULL TIME EDUCATION]

[99].....[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]

- 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