



EUROPEAN COMMISSION

MEMO

Brussels, 6 March 2013

Last year 88% of holidaymakers stayed in the EU. Where will they go in 2013?

Seven out of ten Europeans travelled in 2012 and 75% are planning to go on holiday this year. The results of a recent Eurobarometer survey on attitudes to tourism describe where Europeans went on holiday last year and their plans for 2013. It also looks at what influences their holiday plans: the economic situation, personal recommendations, previous experiences and the quality of paid accommodation.

40% of people expect to take a holiday of between 4 and 13 nights

Just over four out of ten (42%) respondents say they are planning to take a holiday lasting between four and 13 consecutive nights, while just over a quarter (29%) say that they intended to make a short-stay trip of up to three nights. One in five (20%) say that they planned to take a holiday lasting more than 13 consecutive nights. 16% of respondents say they are not planning any trips, while 10% say they are yet to make any decisions.

Last year 71% of people spent time away from home, either for business or pleasure. 88% of holidaymakers stayed within the EU

Just over seven out of ten (71%) spent at least one night away from home when travelling for work or private purposes in 2012, while 27% said they had not done this. There has been little change since the last wave when 72% had travelled and 26% had not.

Turkey is the only country where fewer than half of all respondents had travelled in 2012 (42%). In the other 33 countries at least 52% of respondents had spent at least one night away from home for business or private travel. Icelandic (92%) and Norwegian (91%) respondents are the most likely to have travelled in 2012. Apart from those in Turkey (42%), respondents in Portugal (52%), Lithuania (54%) and Hungary (56%) are the least likely to have spent one night away from home in 2012.

Overall, 88% of EU respondents who went on holiday for at least four nights in 2012 went somewhere within the EU, either in their own country or in another Member State.

Many intend to holiday in their own country in 2013...

Most respondents living in the EU plan to take their "main holiday" in their own country (41%), while 27% plan to visit another EU country. Almost one in five (18%) plan to visit a country outside the EU for their main holiday.

Considering "all holidays" planned for 2013 the pattern is much the same as in 2012. Just over half (51% vs 58% in 2012) are planning domestic holidays, 43% holidays in an EU country, and 27% are planning holidays in a country outside the EU.

...but not quite as many as in 2012

In 2012 47% spent their "main holiday" in their own country, while 31% went to another EU country. The majority of respondents in 16 countries took their holidays of at least four nights in their own country. This is particularly the case for Greek (87%), Italian and Turkish respondents (both 80%) and those in Bulgaria (79%). In contrast domestic holidays were least common amongst respondents in Luxembourg (2%) and Belgium (14%).

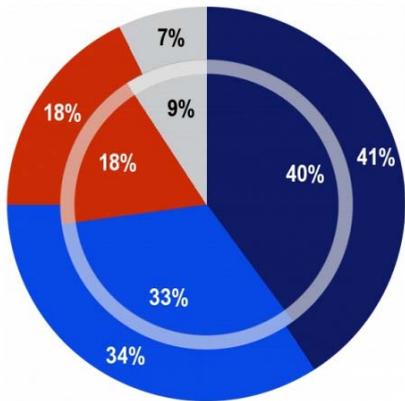
Spain is still the most popular destination for 2013

Spain remains the most popular planned destination (12%), followed by Italy (8%) and France (7%). Austria, Germany, Greece, the UK (all 4%) and Croatia (3%) make up the rest of the top eight.

34% have changed their holiday plans as a result of the poor economic situation

Although overall 75% of respondents say they are planning a holiday for 2013, 34% say they have changed their plans as a result of the current economic situation. Around one in four (41%) say their holiday plans for 2013 have not been affected by the economy, while 18% say they are not planning a holiday.

Q13(2). Has the current economic situation had an impact on your holiday plans for 2013?



- Going on holiday
- Going on holiday but changed the plans
- Not going on holiday
- Don't know

Inner pie : FL334 Jan.2012

Outer pie : FL370 Jan.2013



Base: Total number of respondents

In all but two countries the majority of respondents plan to go on holidays in 2013 - the exceptions are Turkey (44%) and Malta (48%). In fact, at least nine out of ten Norwegian (92%), Austrian (91%), German and Icelandic (90%) respondents plan to take a holiday in 2013.

Financial issues were the main reason for not going on a holiday in 2012

Financial reasons are the most common response for not going on holiday in 2012 (46%), while 23% cite personal or private reasons. Less than one in ten (9%) say that they preferred to stay at home or with family or friends, while 7% cited job reasons and 6% said they did not have the time.

Destination experience is generally good

Almost all respondents (92%) say they were satisfied with the quality of their accommodation in 2012. At least eight out of ten were satisfied with how tourists were welcomed (85%). The same proportion (85%) also says they were satisfied with the quality of activities/services available. 83% were satisfied with the general level of prices (83%). As many as 11% of respondents say they were not satisfied with the accessible facilities for people with special needs.

Accommodation quality is an important factor determining return visits

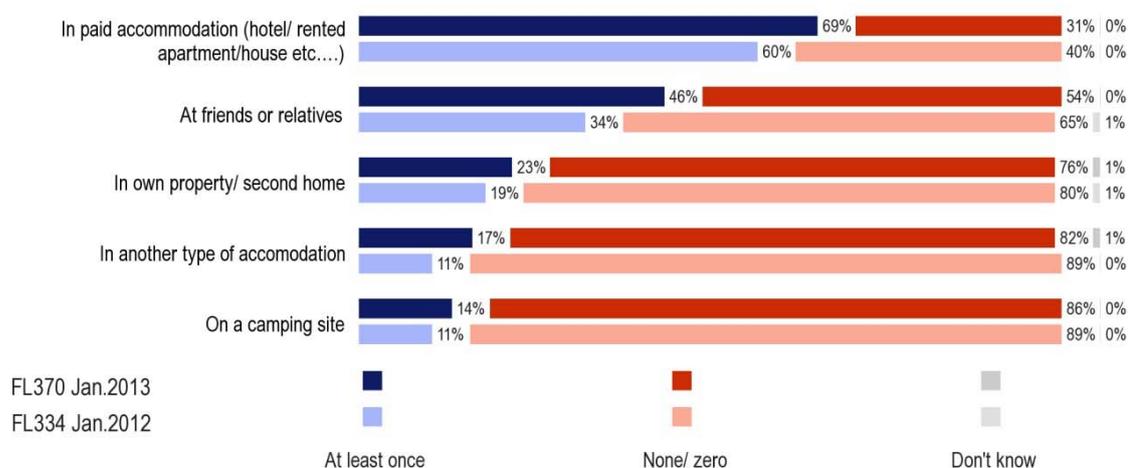
Just over four out of ten (44%) respondents say that the natural features of a holiday destination would make them return for another holiday - a decrease of six percentage points since the previous survey. Quality of accommodation comes a distant second (31%), followed by the general level of prices, cultural and historical attractions (both 26%) and how tourists are welcomed (22%). One in five (20%) would go back to the same place for a holiday because of the quality of the activities or services available, while for 7% accessible facilities for people with special needs would prompt them to return.

Paid accommodation is most popular option

Respondents who said they took a personal holiday of at least four consecutive nights in 2012 were asked about the kind of accommodation they stayed in. More than two thirds (69%) stayed in paid accommodation such as a hotel or apartment at least once, which is an increase of nine percentage points compared to holidays in 2011. Staying with friends or relatives also increase in popularity, up from 34% in 2011 to 46% in 2012.

Almost one quarter stayed in a property they own (23%), while 17% stayed in another type of accommodation at least once. Over one in ten stayed on a camping site at least once, a slight increase compared to 2011.

Q2. Thinking only about your personal holidays, how many times did you stay for a minimum of four consecutive nights in the following types of accommodation?



EU27

Base: 71% from the total number of respondents
(Those who travelled for a minimum of one night in 2012)

Spending time in the sunshine or at the beach was the main reason for holidaying in 2012

Respondents were most likely to say they went on holidays for sunshine or the beach (40%), while 36% took a vacation to visit family, friends or relatives. Just over one quarter (26%) went on holidays to visit nature, while 22% holidayed for cultural reasons and 20% visited a city. Around one in ten went for a wellness, spa or health treatment (12%) while 10% mentioned sports activities as the main reason for their holidays. Just over one in twenty (7%) said a specific event such as a festival was the main reason for their holiday in 2012.

The sun or the beach are more likely to have been the main reason for taking a holiday in 2012 compared to 2011 (+12 percentage points). Visiting nature and holidays for cultural reasons were also more popular in 2012 (both +8).

Personal recommendations are very important when making travel plans. Respondents were asked what sources of information they considered to be most important when making decisions about their travel plans. More than half (56%) say the recommendations of friends, family or colleagues, while 46% mention internet websites. Just over one third (34%) consider personal experience important, while 21% say travel agencies and tourism offices and 11% mention free catalogues or brochures. Fewer than one in ten mention newspaper, radio or TV (9%), paid for guidebooks and magazines (8%) or social media sites (5%).

The internet is still the most common way to arrange holidays

The internet is the most common way to arrange holidays, with 53% using it for this reason in 2012. Around one in five (21%) used someone they know, while 19% used the phone or visited a travel agency. Around one in ten (11%) made the arrangements on site, while 6% use the counter at a transport company and 3% made arrangements by post.

Background

This summary presents the results of the Flash Eurobarometer, "Attitudes of Europeans towards Tourism" (No 370), which was conducted in the 27 EU Member States and in seven additional countries: Croatia, Turkey, the Former Yugoslav Republic of Macedonia, Norway, Iceland, the Republic of Serbia and Israel. This wave is a follow up to the Flash Eurobarometer No 334 conducted in January 2012. Some 30,628 respondents from different social and demographic groups were interviewed.

Eurobarometer: http://ec.europa.eu/public_opinion/archives/flash_arch_374_361_en.htm