

Facts and Figures on
THE EUROPEANS ON HOLIDAYS

1997-1998

Executive Summary
March 1998

A Eurobarometer survey
carried out on behalf of the

European Commission
Directorate General XXIII

Enterprise policy, Distributive trades, Tourism and Co-operatives

This paper presents some key results of the public opinion survey undertaken on behalf of the European Commission (Directorate-General XXIII "Enterprise policy, Distributive trades, Tourism and Co-operatives") in the framework of the 48th edition of the Eurobarometer.

The survey was carried out throughout the European Union between 12 October and 16 November 1997, under the general coordination of INRA (EUROPE) - European Coordination Office in Brussels.

The technical specifications are given in annex. The full report including all results of the survey will be made available on our Internet site:
<http://europa.eu.int/comm/dg23>

The European Commission cannot be held liable in any way for the contents of this paper.

For further information on this survey and on other Community measures, please contact :

European Commission, DG XXIII
Tourism Unit (tel. + 32.2.299.50.50, fax .296.13.77)

For information on Community activity in the field of tourism, please refer to :

Community measures affecting tourism - 1995-1996,
European Commission COM(97) 322 final of 2 July 1997
(ISBN 92-78-21851-0)

Further information on tourism statistics are collected by the Statistical Office of the European Communities (Eurostat) and are presented in the following publications :

Community methodology on tourism statistics, Eurostat - DG XXIII 1998
(ISBN 92-828-1921-3)
Tourism in Europe 1995, Eurostat - DG XXIII (ISBN 92-827-3969-4)
Tourism in Europe: Key Figures 1995-96, Eurostat - DG XXIII
Tourism - Monthly Statistics, Eurostat Theme 7, Services and Transport - Series B
Tourism in the Mediterranean Countries - Key Figures 1994-95



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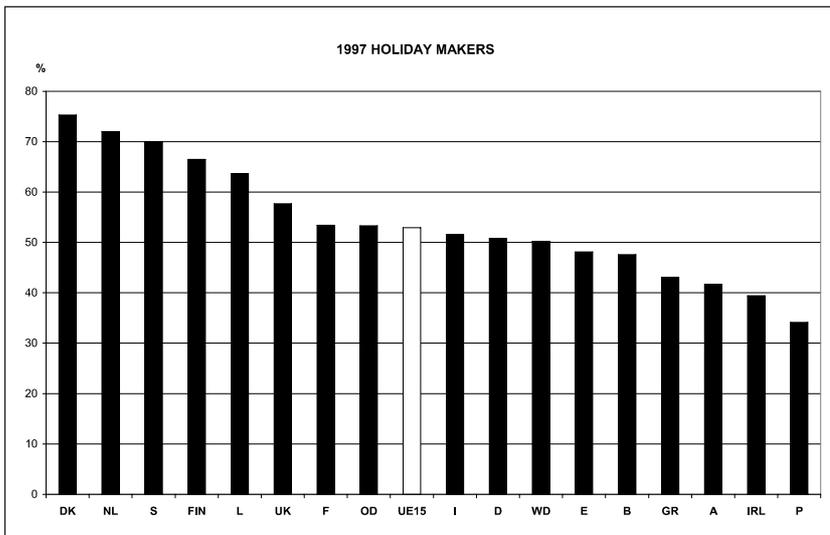
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➔ **EXECUTIVE SUMMARY**

➔ *Profile of the European holiday makers*

In 1997

In average, every second European has been away from home on holiday in 1997 (53%). The northern countries, and especially the Scandinavian countries, together with the Netherlands, rank first, whilst, in general, people tend to go less on holiday in the Southern countries. In Portugal, for instance, about three people out of ten have been away from home on holiday last year - in Denmark, holiday making over the same period of time concerns seven people out of ten.



Who are these people? There are no differences between genders, but age, education, income and occupation do play a role. In particular, it is amongst the '25-39' age group (59%) that the highest proportion of holiday makers is found, followed by the '40-54' age group (56%). The younger group is third (55%) and the older group last (45%).

Those who have completed higher education are more likely to have been on holiday in 1997, and the same goes for the student.

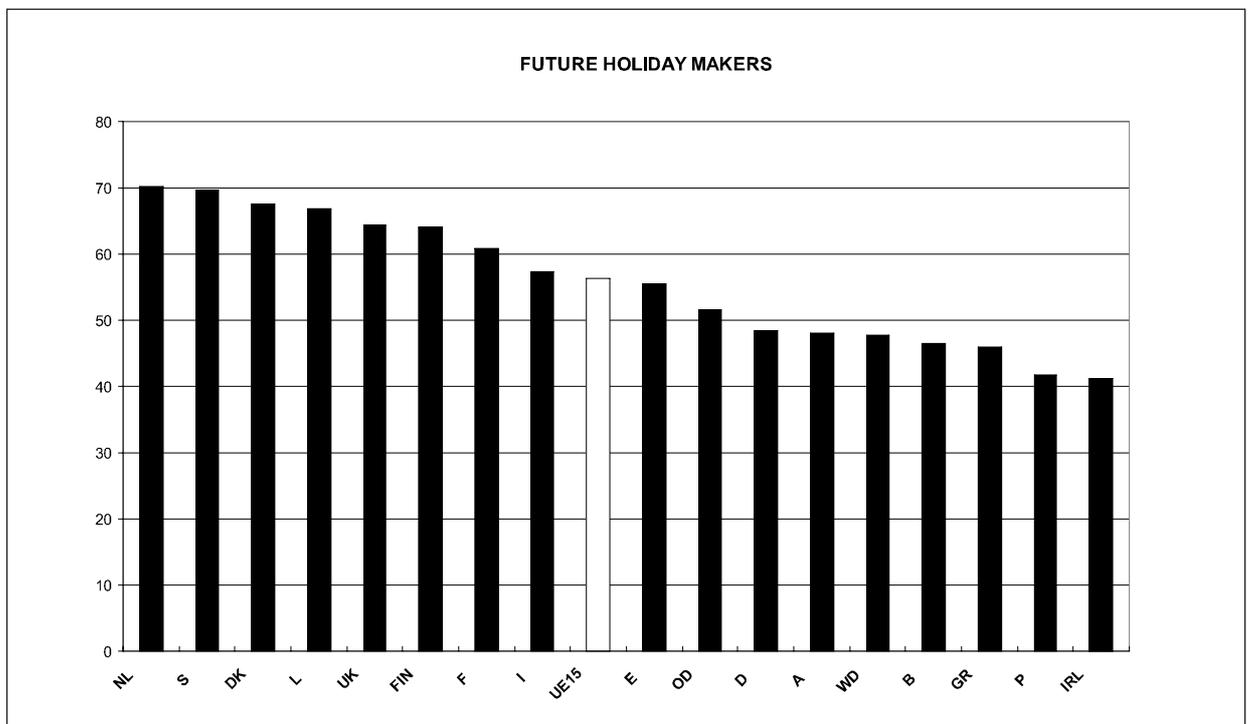
Not surprisingly, as one goes down the income scale, one sees the likelihood to find Europeans who have been away from home on holiday in 1997 decreasing rapidly.

A significant proportion of Europeans have been away on holiday several times in 1997. 33% of the holiday makers have been a second time on holiday, 11% a third time, 3% a fourth time.



Plans for 1998

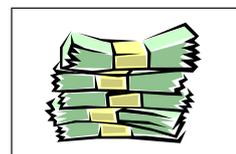
56% of Europeans are planning to go away on holiday in 1998, 41% of whom for as long as in 1997, and 27% for longer than in 1997. When considering their future holidays, it is the same three countries, although not exactly in the same order, which come first, The Netherlands, Sweden and Denmark, where about seven out of ten people declare to be planning to go away. Ireland and Portugal are last in the queue with around four people out of ten saying so.



Profile of those who did not go on holiday in 1997

In average, 46% of Europeans did not go on holiday in 1997. Why is that? Financial reasons (49%) have kept them at home, then family or personal reasons (24%) being another kind of obstacle. Professional or health reasons had a smaller part to play (17% and 16% respectively). A closer look at the sociodemographic characteristics shows that twice as many men (23%) than women (11%) mention " Professional reasons " as a factor which stopped them from taking holidays in 1997.

18% of those who did not go away on holiday in 1997 have never been away on holiday, 28% went for the last time in 1996 and 27% in 1995.



→ Holiday making - A detailed picture

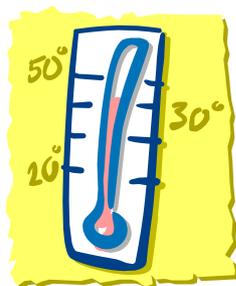
→ When do they take holidays?

August certainly stands out as the month which a majority of European holiday makers points out as the one in which they took at least one of their holidays (41%). The other summer months collect the next highest proportions of votes. December also stands out with a higher percentage than the neighbouring months (7%). But this does not mean that no holiday makers choose the other months to go away; on the contrary, between 3% and 11% have been away on holiday during the first five and the last three months of the year.

Are there any national peculiarities?

- The British tend to go away in June more than the European Union average (20% against 14%);
- Belgians go away in July more than they do in August (43% against 36%), and so do the Danes (48% against 20%), the Irish (27% against 23%), the Dutch (38% against 28%), the Finns (46% against 24%) and the Swedes (55% against 20%);
- The Germans, Dutch and Danes go away in May more than the European Union average;
- The French go away on holiday more in July and August than the European Union average.

Income is linked to the month in which Europeans have taken their holidays in the following way: the highest income brackets show the highest proportions for the first four months of the year (4%, 7%, 8%, 10% each), July (32%) & August (41%), and for the last three months of the year (10%, 4% & 9% respectively)

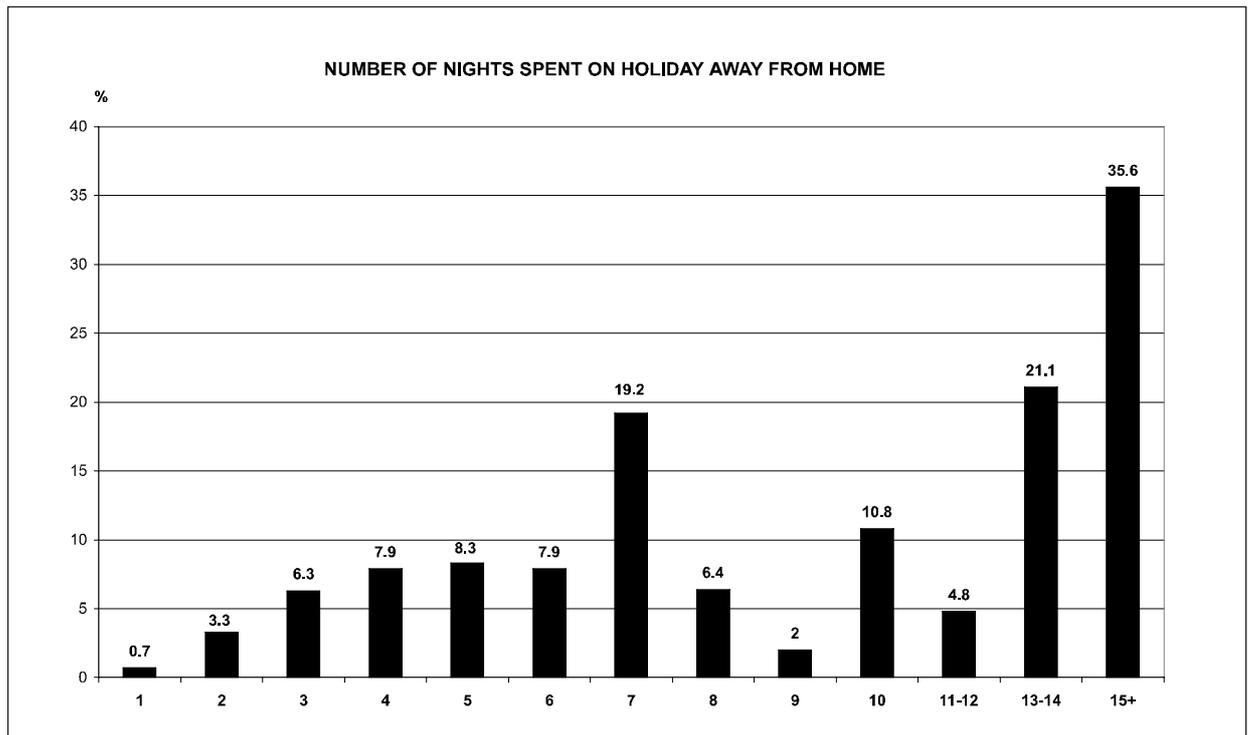


Nr. 1 ... August, July & the other Summer months



For how many days?

European holiday makers tend to take whole weeks of holiday rather than (multiple of) days. 36% go for more than two weeks, 21% for two weeks and 19% for one week.



Belgians favour stays of 13-14 days, the Danes have scores above average for all lengths of stay under two weeks, Germans choose preferably to stay for two weeks, as do the Irish. The Dutch generally show above average results for all lengths of stay.

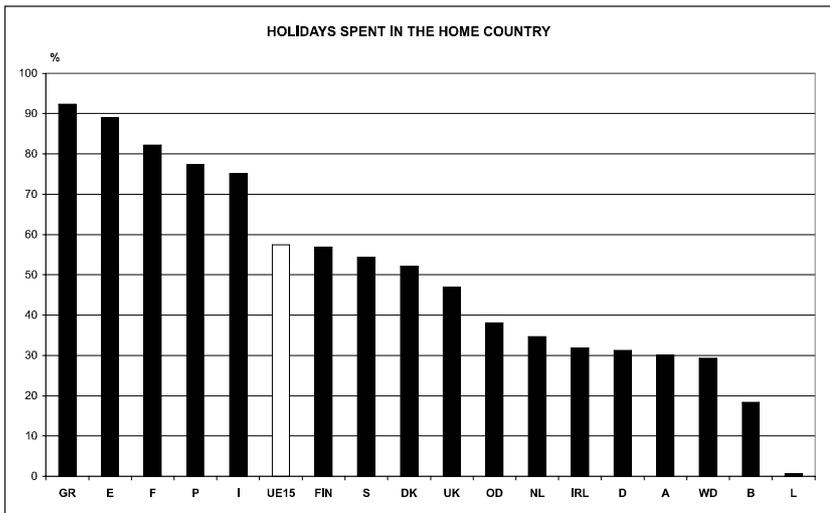


→ In which country do they stay?¹

To stay in their home country is the rule for many European holiday makers. This is remarkable in the southern countries (Greece, Spain, Italy, Portugal, France), but also in Finland.



Greece



For the others, to go to another European Union country is the principal alternative. This is particularly true for Luxembourg (91% of responses designate another European Union country), Belgium (74%) and Germany (73%).

More in detail, top destinations by originating Member State are²:

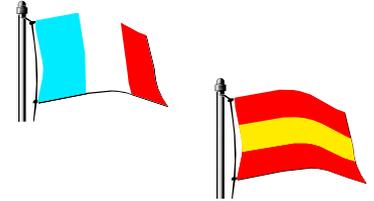
Originating Member State	Number 1 Destination	Number 2 Destination	Another EU country ³	A country outside Europe
B	France (24%)	Spain (21%)	74%	13%
DK	France (10%)	Greece (9%)	59%	9%
D	Spain (17%)	Italy (15%)	73%	9%
GR	Germany (2%)	France (2%)	8%	1%
E	France (2%)	Portugal (2%)	10%	4%
F	Spain (7%)	UK (2%)	22%	8%
IRE	Spain (19%)	UK (18%)	58%	14%
I	France (8%)	Spain (4%)	25%	5%
L	France (23%)	Spain (19%)	91%	10%
NL	France (20%)	Spain (9%)	67%	9%
A	Italy (19%)	Greece (13%)	65%	14%
P	Spain (9%)	France (4%)	19%	2%
FIN	Spain (8%)	Sweden (6%)	32%	6%
S	Spain (12%)	Greece (10%)	53%	8%
UK	Spain (18%)	France (9%)	52%	16%
EU15	France (19%)	Spain (19%)	44%	9%

1 - Only stays of more than 4 nights are analysed in the rest of this paper.

2 - Beside staying in their home country.

3 - Includes Number 1 & Number 2 Destinations

The lion's share is taken by France and Spain. It can't be argued that it is only proximity which governs the selection of a holiday destination, even if it has some role to play in this. The climate, the cost of travel, of living, of accommodation, etc. have also a determining influence when holiday makers make their choice.



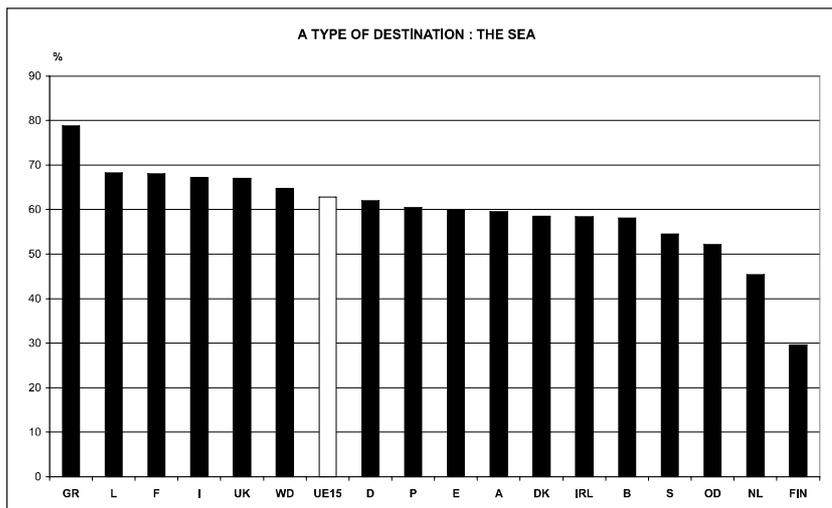
→ *With whom do they travel?*

European holiday makers go away on holiday primarily with their partners (61%) (with Finland at the lower end (41%) and Denmark at the upper end (66%), - then with children of less than 18 years of age (25%) - again Finland (15%) and France (31%).

10% of holiday makers go away alone. Who are these people? This group is made out of more women than men (11% against 9%), aged 55+, with the longest studies, the lowest levels of income, and retired.

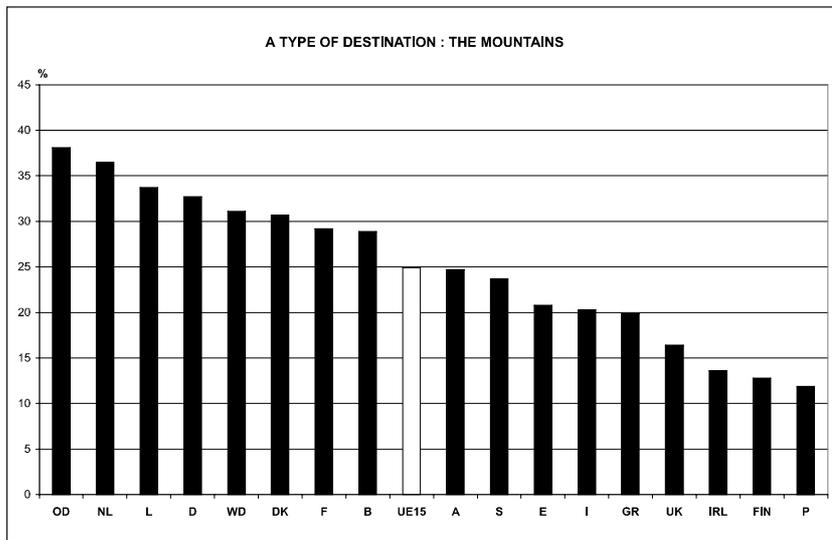
→ *Which type of destinations do they choose?*

First of all, European holiday makers choose the sea (63%). Other main types of destinations are the mountains (25%), cities (25%), the countryside (23%).



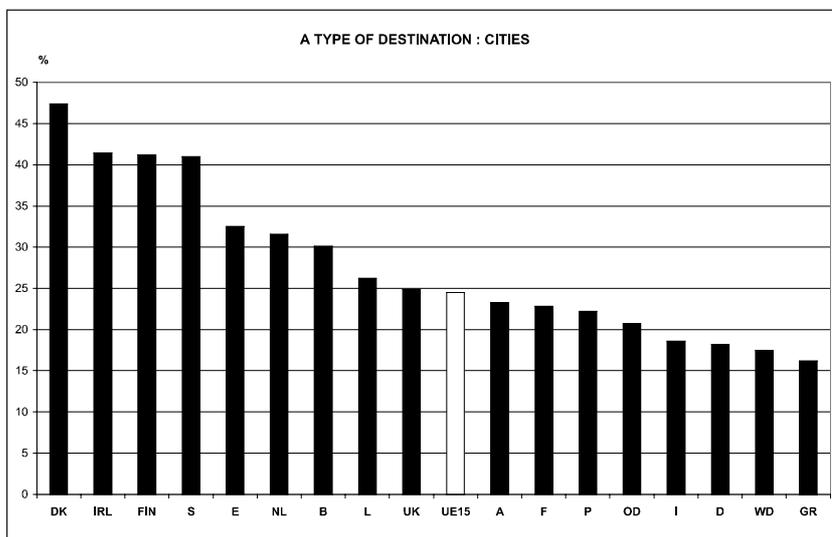
At one extreme, eight Greeks out of ten choose the sea - most probably the sea in their home country - against, at the other extreme, only three Finns out of ten.

Neither gender, nor age make any difference in the selection of this type of destination. However, people aged 55+ tend to choose it less than the other age categories, and so do the people belonging to the lowest income brackets and the retired.



The Dutch come first (preceded only by the citizens from the new landers in Germany), the Portuguese last (38% and 12% respectively).

The higher the age group, the higher the proportion of people who choose this type of destination. In this group, one finds also retired people, housewives and managers.



For urban tourism, the Scandinavian countries and Ireland come first (with 4 to 5 people out of ten), Greece, Germany and Italy are last in the queue (with 2 people out of ten).

The younger age group seems to prefer this type of destination. Students and people who left school after 20, but as well those falling within the lowest income brackets and those in the second highest seem to select it preferentially.

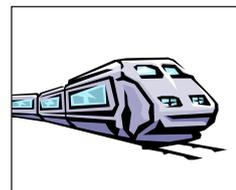
→ **What means of transport do they use?**

European holiday makers use their own car (58%), the plane (31%) (whether charter or scheduled flights) or the train (10%) to reach their holiday destination. On the spot, their privileged means of transport are still their own car, but then followed by walk and tourist coach.

Unsurprisingly, the Greeks use boats (undoubtedly the most adequate means to reach their numerous islands) in similar proportions to their own car (respectively 43% and 48%).

The French (74%), the Italians (63%) and the Spanish (61%) use their own cars in proportions significantly higher than the European Union average (58%). The Swedes (31%), the British (28%), the Irish (26%), the Danes (25%), the Austrians (24%) make above average (16%) use of charter flights. The Irish, the Luxembourgers and the British make above average use of scheduled flights (respectively 33%, 33% and 23% against the European Union average 15%).

Cars are means of transport used mainly by the middle range age categories ('25-39' and '40-54'), tourist coaches by the eldest ('55+').



→ **Which types of accomodation do they use?**

Hotels and holiday clubs (42%) come first on the list of accomodations chosen on holiday. The other possibilities, such as to stay in one's own family (16%), on a camp site (14%), in a rented flat (13%) come next.

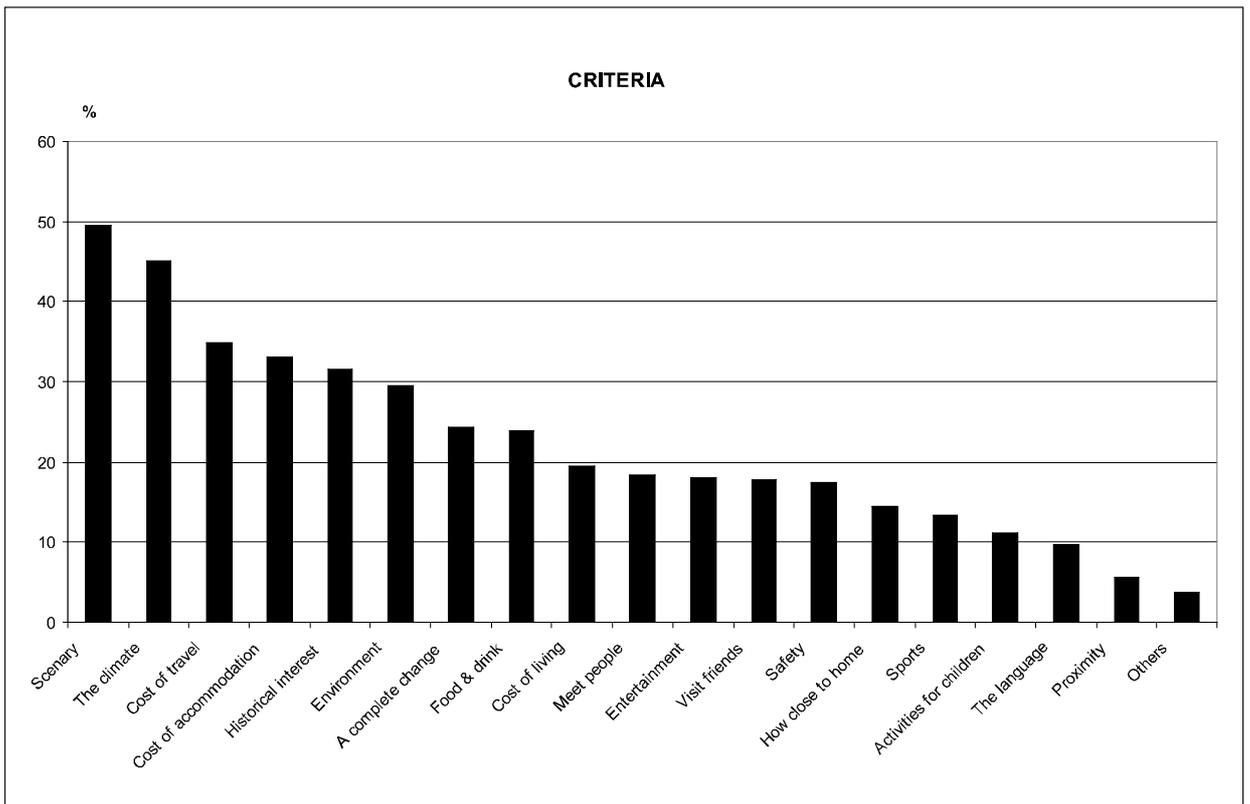
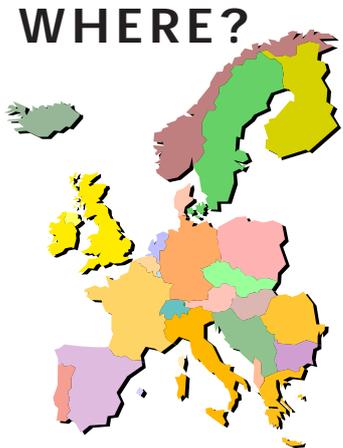
The first option is more strongly favoured by the Austrians, the Luxembourgers, the Belgians, the Germans and the Italians. In terms of sociodemographic characteristics, the older the holiday maker, the more likely he is to have chosen this predominant option. To stay in a hotel or holiday club seems to be more attractive to those who have completed the longer studies, to the highest income brackets, to the self employed, to the retired, to the managers and other employees.

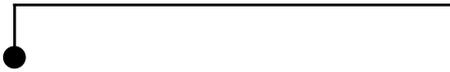


→ **What are the criteria for choosing a destination?**

The scenery (49%) and the climate (45%) are the two determining factors when a destination is selected. The cost of travel (35%) and the cost of accommodation (33%) come next.

It is remarkable that in Ireland, only 2% choose the scenery as a key criteria for selecting a holiday destination. On the other hand, in this Member State, the possibility to visit friends and relatives is an option which attracts more votes than the European Union average (27% against 17%).

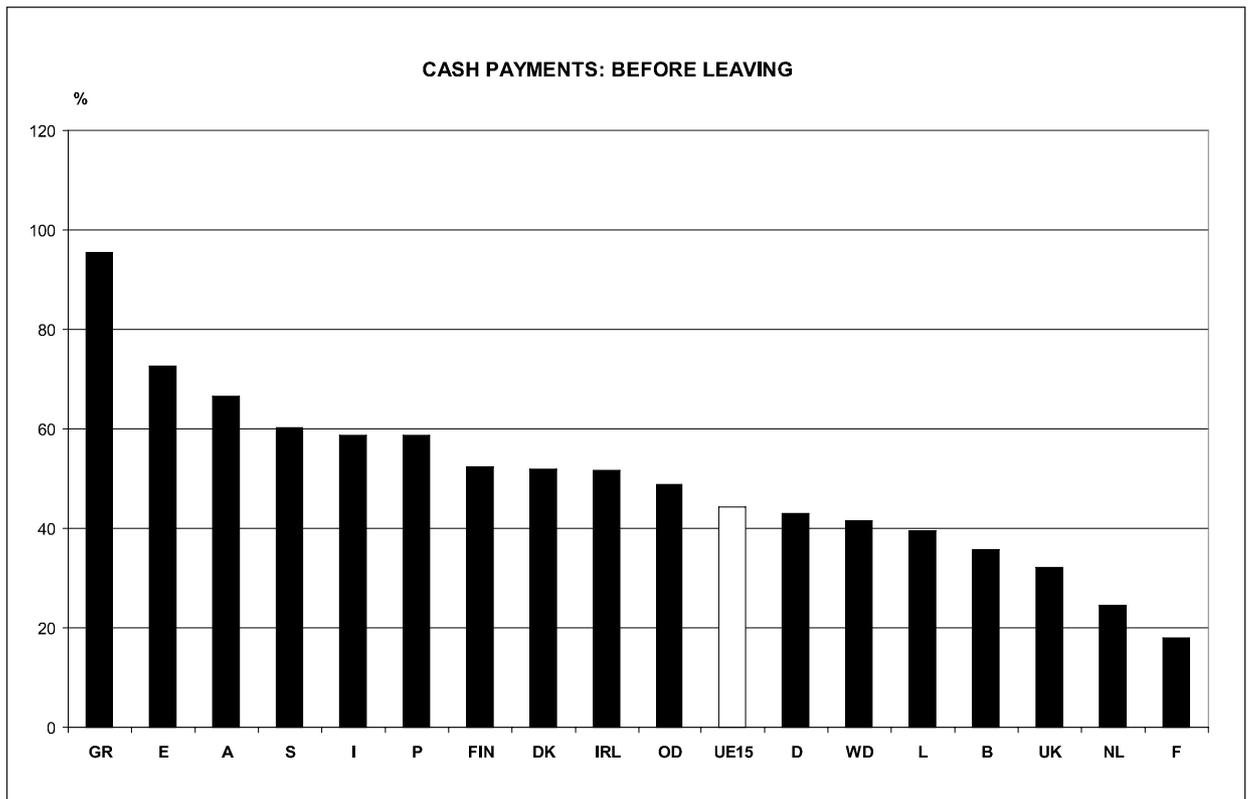




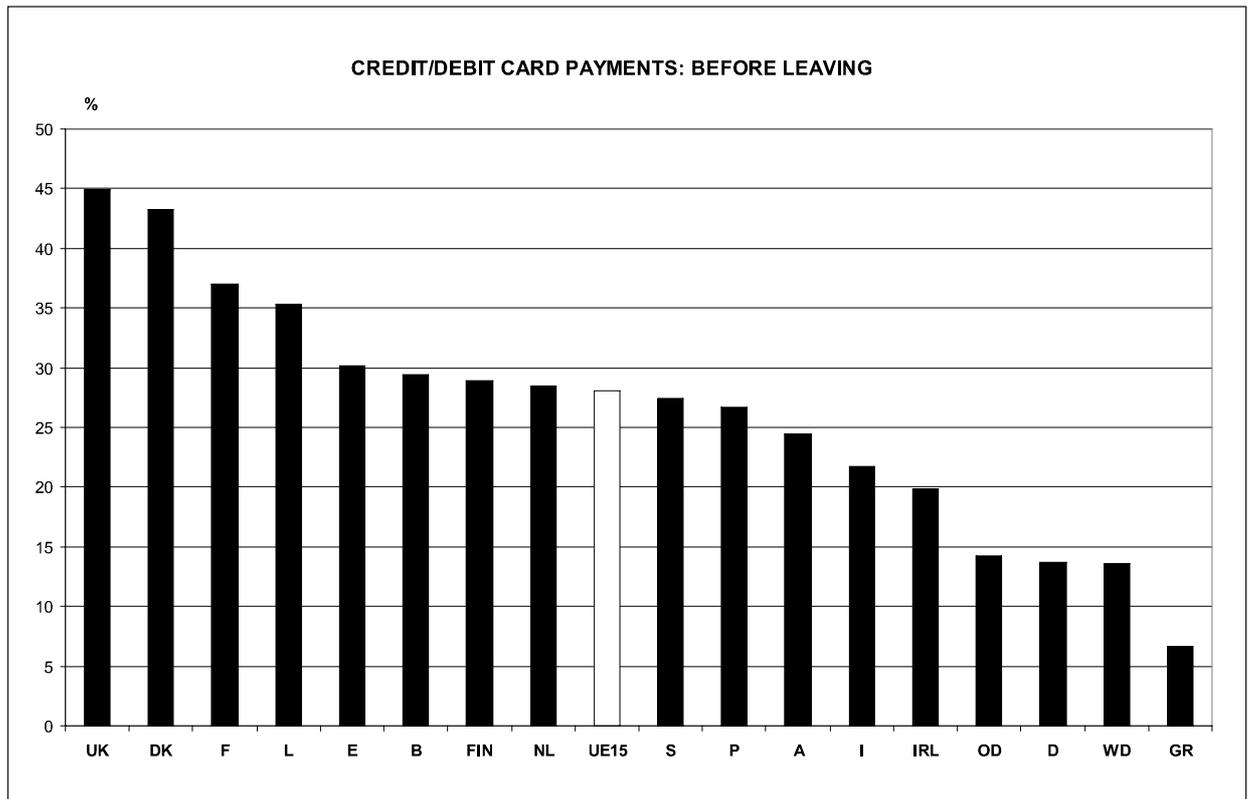
How much do they spend, how and for what?

67% of holiday makers spent in 1997 about 2,000 Ecus for their holidays.

Before leaving, in average in Europe, the most common means of payment is cash (44.2%). However, large variations appear between the different countries. For instance, 96% of the Greek holiday makers use this method of payment. On the contrary, France stands out with only 18% using it. The Netherlands and the United Kingdom come close behind (25% and 32%).

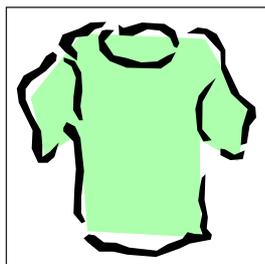


In France and the United Kingdom, payment cards (whether credit or debit card) come first, in the Netherlands, the Giro system is on top of the list.

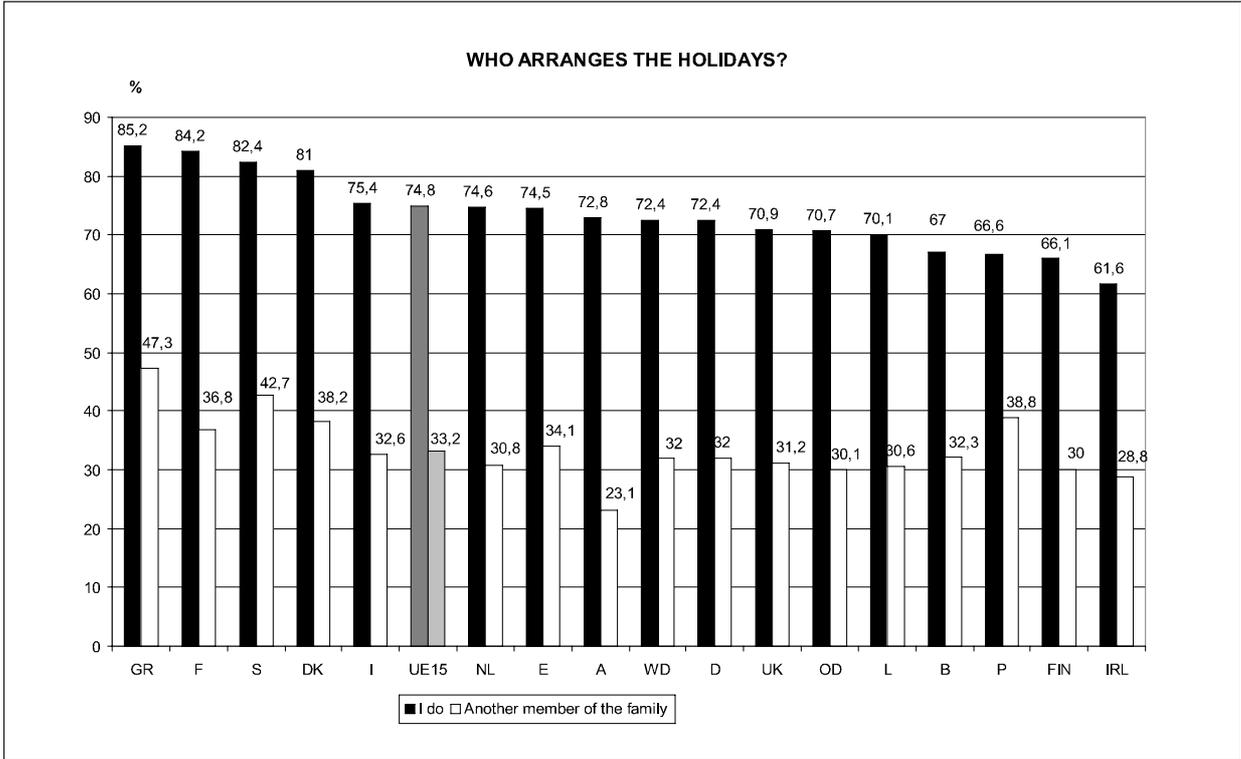


Once on the spot, cash increases in importance.

What people buy on the spot is mainly food products (the Netherlands and France at the upper end, 73% and 72%) and local craft products, as well as clothes.



Who arranges the holidays?

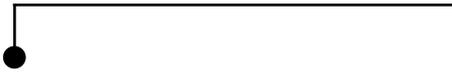


European holiday makers tend to rely more on themselves (75%), or on other members of their families (33%) than on travel agencies (15%) to arrange their holidays. This is especially true in Greece (only 4% of responses designate travel agencies, either to arrange the whole trip or to arrange travel and accommodation only).

The younger (64%) tend to be less involved in the preparation of their holidays than the other age groups. The higher income group (21%) use travel agencies in higher proportions than the others.



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Did they experience any problems?

European holiday makers report very seldom specific problems they have experienced during their holidays in 1997. When they do, it is the general state of the environment which is most commonly pointed out (9%) as a source of problems, and the state of the environment in the tourist places they visited (8%).

The people belonging to the '55+' age group notice this first issue less than others (6%), whilst it is more strongly noted amongst those who completed the longest studies, as well as by the students (11% each) and by those belonging to the highest income brackets (10%).

The quality of food and restaurants - mainly a complaint of the younger Europeans -, that of the accommodation - the people over 55 years of age almost don't notice it -, that of transport (7% each) and that of other services (5%) - more of an issue for the highest income group - come next in this list.

The safety of one's belongings is highlighted twice as much as the personal safety or that of one's relatives (5% against 2%). Students and, generally, the youngest Europeans declare more than the others to have faced problems relating to the safety of their personal belongings. Income plays a role in the sense that the two ends of the scale, i.e. the highest and the lowest income brackets, state in higher proportions than the two middle range classes to have had this kind of bad experience. The younger group seems also to be more of a prime target for aggression than the other Europeans.

Reservations made by the holiday maker himself (3%) are amongst the bottom three, together with the quality of medical assistance (3%) and the already mentioned personal safety problems (2%). Problems experienced with the services provided by the travel agency or the tour operator collect a mere 4%.



Are Europeans satisfied with the holidays they have taken in 1997?

Virtually all Europeans are satisfied (whether 'very' or 'fairly') with the holidays they have taken in 1997 (94% in average). With this result in view, it is easy to figure out how small the variations between Member States are. However, it could be noted that all the Southern countries are below the European Union average, whilst two Scandinavian countries, Sweden and Denmark rank first.

Is satisfaction a matter of age? It could be seen that way as the proportion of people aged 55 and over who declare to be very satisfied is significantly higher than that of the other age groups (63% against the European Union average, 57%).

