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Foresight – issue 137


Preferences of Europeans towards tourism

March 2015

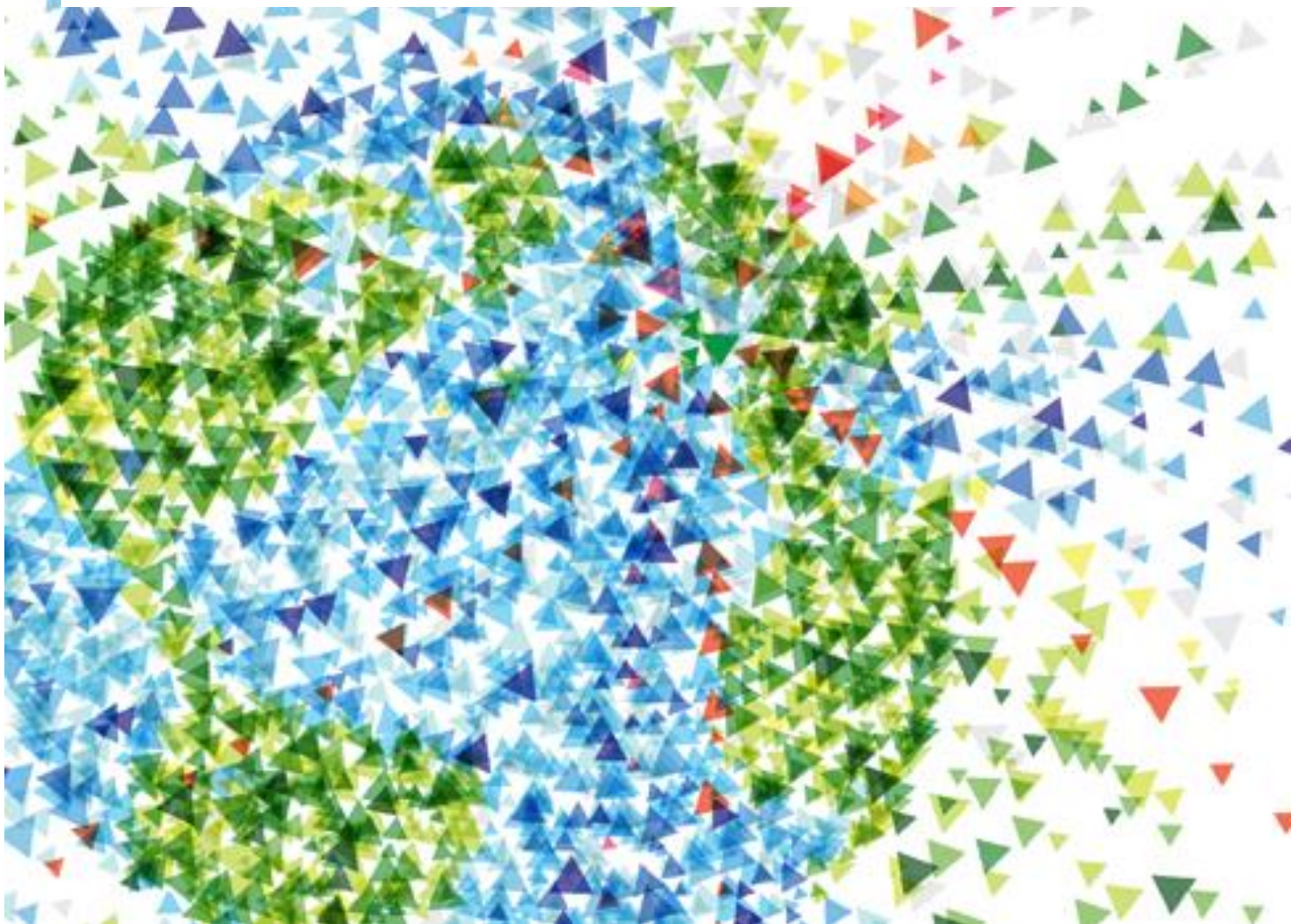
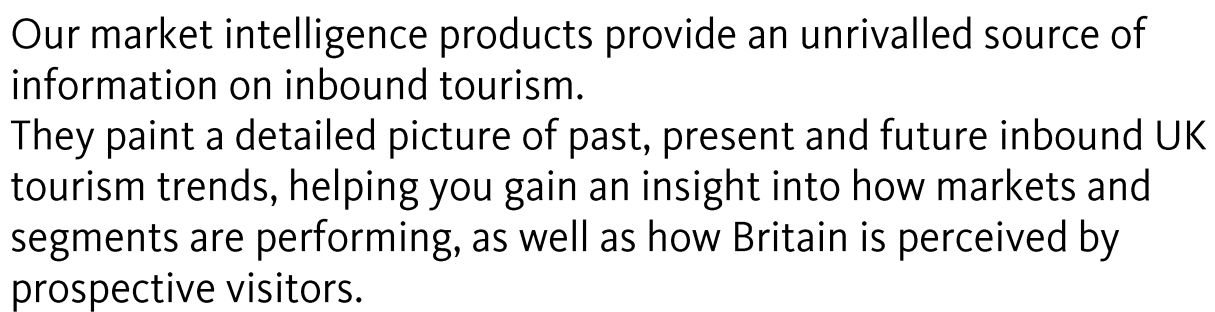
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Preferences of Europeans towards tourism

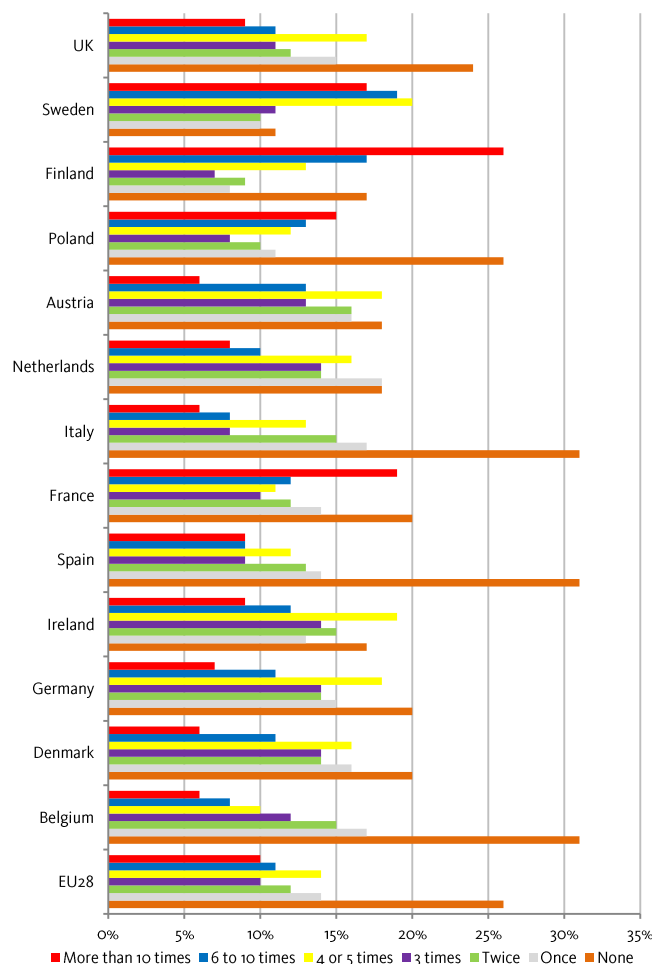
Introduction

It is the time of year when our attention turns to the now annual investigation that the European Commission conducts into the attitudes of Europeans towards tourism. Earlier this year 30,000 Europeans were quizzed, so this month we consider what the latest findings tell us about the holiday habits of Europeans and how they are responding to the current economic situation.

Trip taking in 2014

The study captured information about the number of trips that were made during 2014 that included an overnight stay away from home, either for business or for any 'private' reasons, for example going on holiday.

Chart 1: Overnight trips away from home in 2014



It can be seen from Chart 1 that when looking across the entire

EU28 markets 26% of respondents reported having made no overnight trips away from home, meaning that 74% of EU citizens did make at least one such trip – the same result as in 2013.

Roughly one-in-seven made just a single trip, with slightly fewer taking two trips. Around 45% took three or more overnight trips during 2014, up on the year before.

Exploring the chart further, which shows results for the leading European inbound source markets to Britain, along with the UK for the sake of comparison, (results for all markets covered in the study appear in the full report – see Further Reading section later), it can be discerned that almost one-third of those in Belgium, Italy and Spain took no trips last year with the proportion staying at home in Poland being not that far behind.

At the other end of the spectrum 56% of those in Finland and Sweden took four or more trips away from home in 2014.

Holidaying in home country

A question that we have not looked at in Foresight before asks those who took at least one trip in the previous year of at least four consecutive nights in duration, which country they went to for their main holiday and for any other holidays.

Chart 2 looks at the findings and we can see that 40% of those in the EU28 took their 'main' holiday in their home country with on average 14% taking 'other' holidays in their home country.

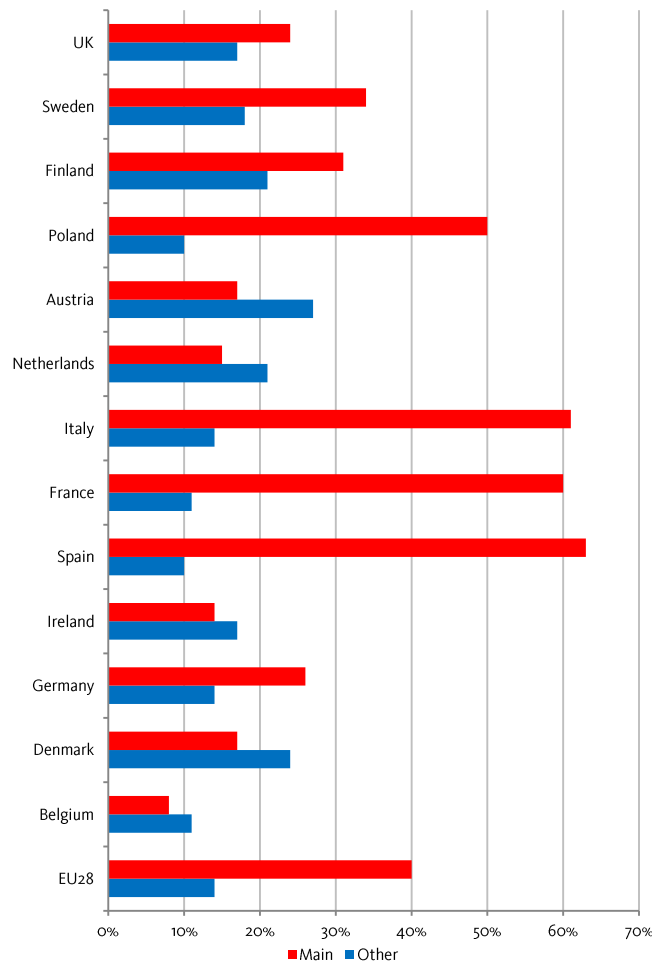
Looking at those countries shown on the chart where more than 60% of all 'main' holidays were taken in the home country we find Italy, France and Spain, followed by Poland on 50%. By contrast a mere 8% of Belgians took their 'main' holiday in Belgium itself with 11% taking 'other' holidays there.

Belgium is also one of a small number of countries including Austria, Denmark, Netherlands and Ireland, where the likelihood of taking 'other' holidays in the home country outstripped that for taking the 'main' holiday in the home country.

Motivations for taking a Holiday

For respondents who had taken a holiday during 2014 of at least four consecutive nights in duration the survey asked about their main reasons for going away, with it being possible to mention up to four 'main' reasons.

Chart 2: Taking 'main' and 'other' holidays in own country in 2014



The results are shown in Chart 3 revealing that 48% of EU28 citizens who had holidayed in 2014 said that 'Sun/beach' was one of the main reasons for this, making it the most common response. Those in the UK (55%) and Belgium (50%) were the most likely to cite 'Sun/beach'.

Visiting friends or relatives was the next most common reason mentioned by those taking a holiday in 2014 (36% for the EU28) varying from 29% for Austrians to 48% of the French.

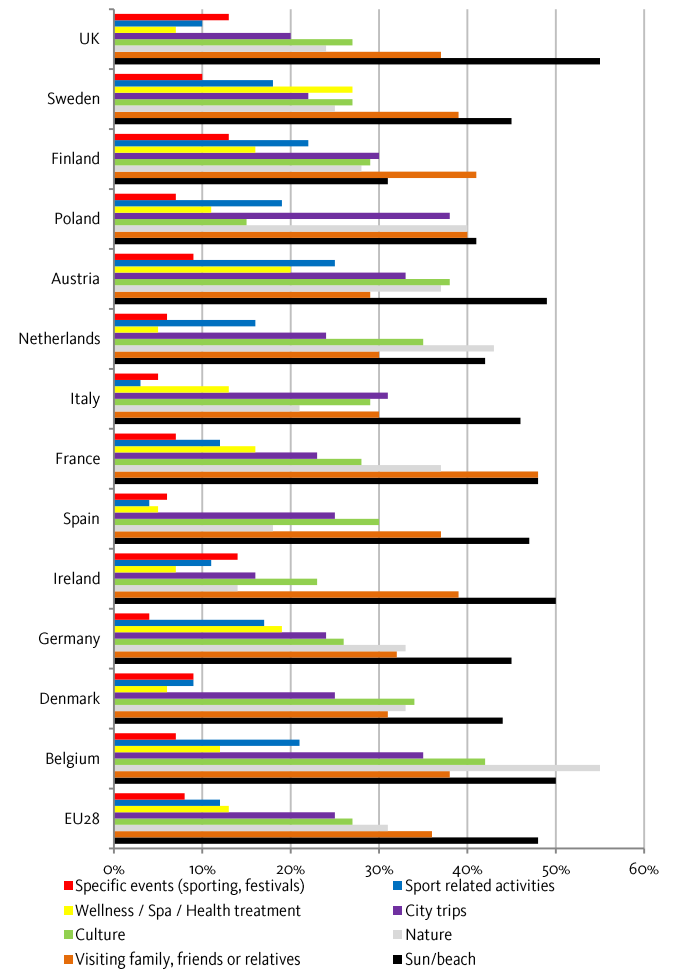
Nature was referenced by 31% rising to 55% of Belgians and 43% of the Dutch. Nature was least likely to be mentioned by those in Ireland on just 14%.

Focussing on Culture we can see that Belgians and Austrians were more likely than average to say it had been a reason for going on holiday whereas those in Poland were far less likely than average to declare it as having been a holiday motivator.

The chart confirms that only a minority say that a reason for going

on holiday in 2014 was a specific event, such as sport or a festival, but this was most likely among the Irish (14%), Brits and those in Finland (both 13%).

Chart 3: Main reasons for going on holiday in 2014

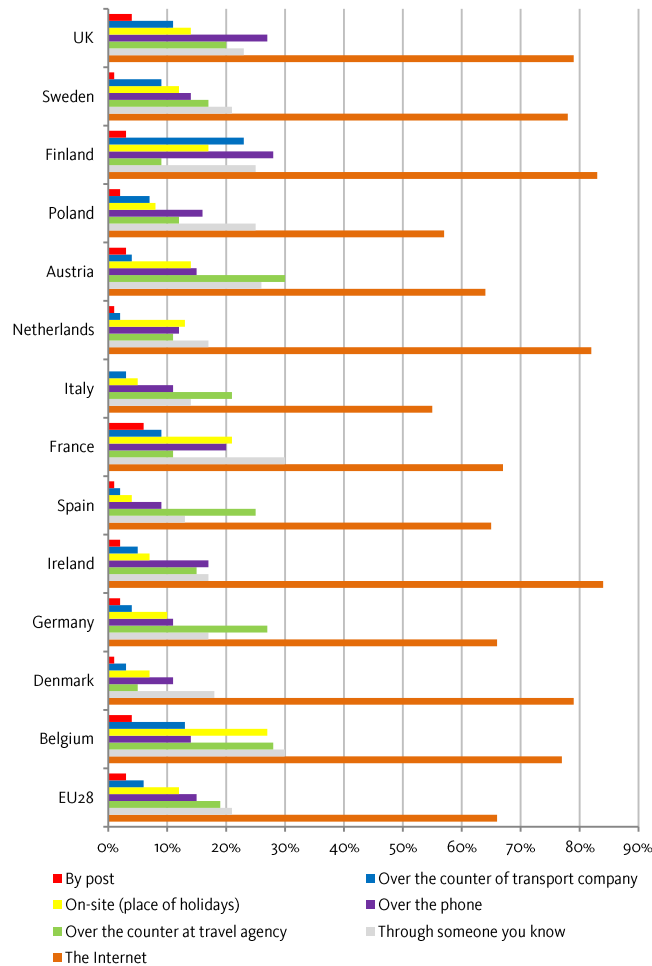


How 2014 Holidays were arranged

Again looking just at those who had taken at least one personal trip of a duration of four or more nights in 2014 the survey asked them about how they had arranged their holidays, with the option to cite as many different methods as were relevant (Chart 4).

A very clear-cut finding emerging is that the Internet is by far the most popular tool for arranging holidays, with 66% of EU28 citizens reporting having made use of the web to arrange a holiday (up from 58% a year ago and 53% two years ago), rising around 80% of those in Ireland, Denmark, Finland, Sweden and the UK. Those in Italy were the least likely to use the Internet, but even here 55% did so.

Chart 4: How holidays were organised in 2014



The proportion saying that they had arranged a 2014 holiday ‘over the counter at a travel agency’ is of interest, with this varying from 5% in Denmark through to 30% in Austria. Those in Belgium were the most likely (among the countries shown in the chart) to say that they had arranged a holiday ‘on site’ – the third consecutive year for which this has been the case.

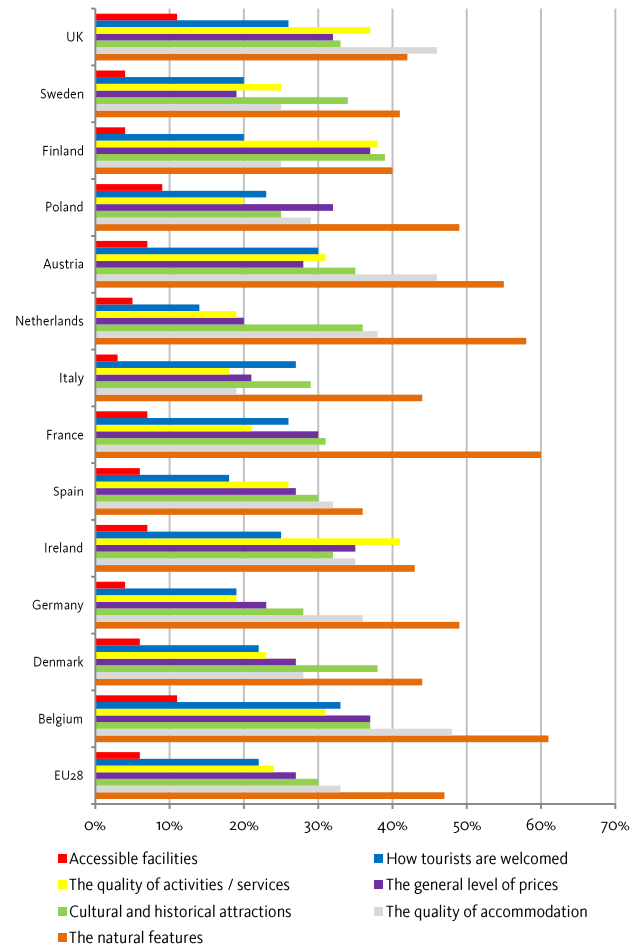
Drivers of Destination Loyalty

Asked about what would make the respondent return to the same place for a holiday (with the chance to name up to four different reasons) it can be seen from Chart 5 that ‘loyalty’ more often than not depends on the ‘natural features’ of a destination such as the weather and the landscapes, with 47% of all EU28 saying this was why they had gone back to the same place, ranging from 61% of the Belgians down to 36% among Spaniards.

In most, but not all, markets ‘Quality of the accommodation’ is the next strongest driver of loyalty with this a particularly important consideration for Austrians, Britons and Belgians, but less so for

those in Italy.

Chart 5: Reasons to return to the same destination



Cultural and historical attractions, product that Britain has in abundance, is of greatest importance when thinking about what drives repeat visits, to those in countries including Finland and Belgium, but of slightly less importance to those in Poland.

Although near neighbours it is interesting to observe that while 33% of Belgians reckon how tourists are welcomed can influence them to return to the same destination the equivalent figure for the Dutch is just 14%.

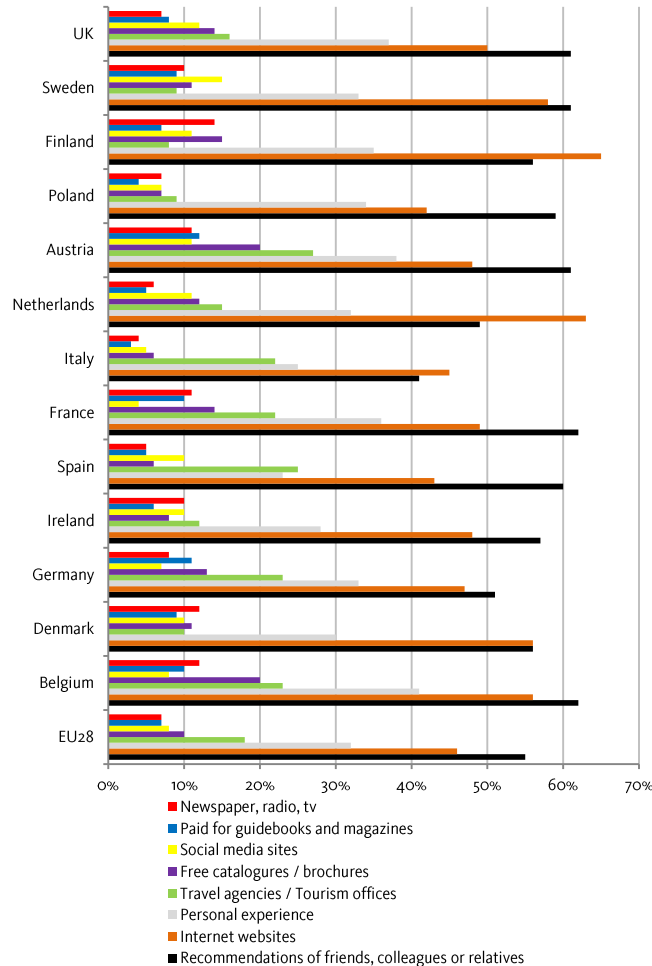
Influences on Travel Plans

Looking at what influences travel plans is another insightful aspect of the European Commission study, with respondents asked to identify up to three information sources that they consider to be important when making travel plans (Chart 6).

In all but three of the countries covered in the chart it is recommendations of friends, colleagues or relatives that leads the

way, while for those in Denmark, Finland and the Netherlands it is the Internet. Advocacy would appear to be at its most important in France, Belgium, Spain and Sweden, but even among Italians it was cited as an important information source by 41%.

Chart 6: Most important information sources for travel plans



Austrians and Belgians are among the most likely to consider their personal experience as being an important source of information while Travel Agencies/Tourism Offices are seen as being more important information sources by those in Spain, Austria, Belgium, France, Germany and Italy than is the case elsewhere.

Just 8% mentioned social media sites but it was almost double this among Swedes (15%) and quite a bit higher for Britons (12%). At the other end of the spectrum just 4% in France cited social media sites as an information source that they considered important.

Impact of Economic Situation

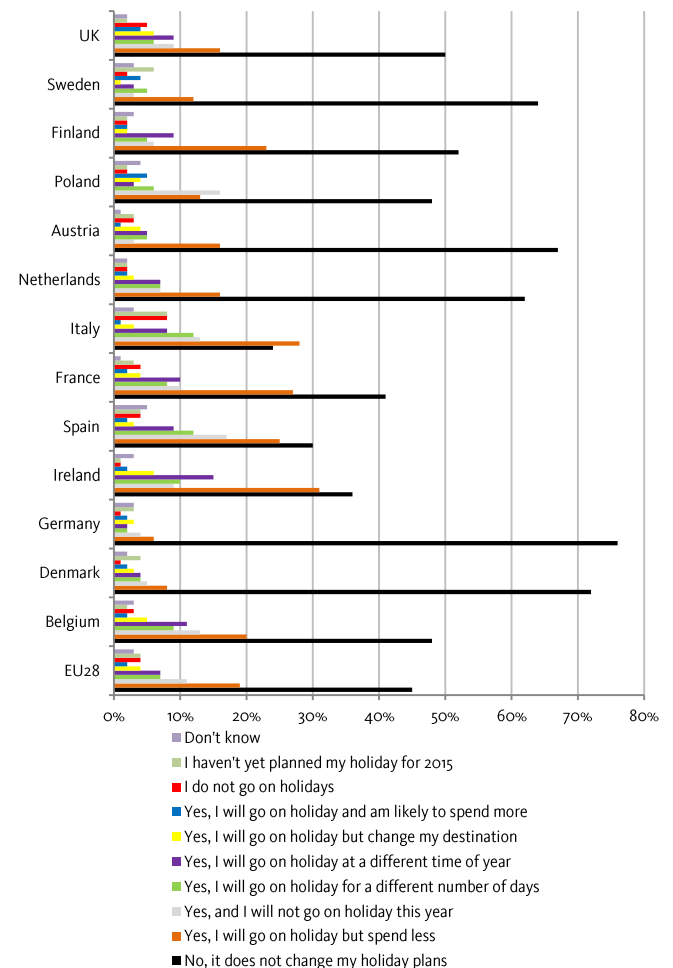
Respondents were asked whether the current economic situation is having an impact on their holiday plans for 2015. We can see

from Chart 7 that 45% of those across the EU say that the economic situation is having no impact on their 2015 holiday plans, but this rises to 76% of Germans and 72% of Danes, but applies to only 24% of Italians and 30% of Spaniards.

The most common action likely to be taken by those who said the economic situation was having an impact was that while they would go on holiday during 2015 they would spend less, with 31% of those in Ireland stating this.

Only 11% said that the economic situation meant that they would not go on holiday during 2015 but this was as high as 16% among those in Poland and 17% in Spain. Just 3% of Austrians and Swedes said that they would be unable to holiday in 2015 due to the economic situation.

Chart 7: Impact of economic situation on holiday plans for 2015

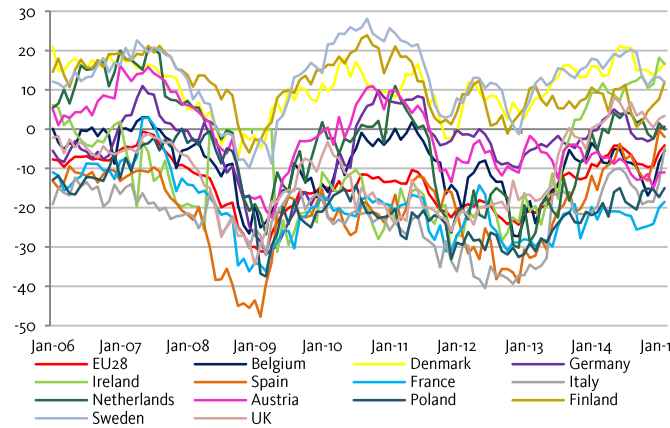


Consumer Confidence

The most recent poll of consumer confidence across EU countries (Chart 8) shows that the Irish, Danes, Swedes and Finns were the most upbeat in early 2015 while those in France and Poland were

the gloomiest in terms of future prospects. Over the longer term just about everyone is more confident now than back in 2009 during the worst of the global financial crisis.

Chart 8: Consumer confidence (balance)

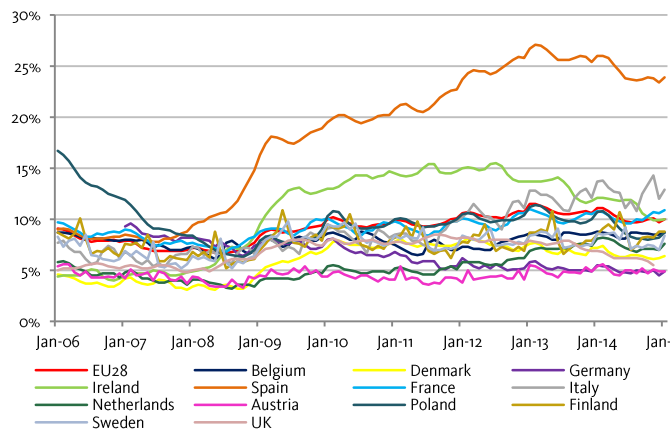


Unemployment

The economic reality for those without work is obviously far starker than is the case for those in work but who are uncertain about their economic prospects in the future.

Looking at the latest figures on the rate of unemployment (Chart 9) it can be seen that there is enormous variation across the various countries covered. Back in 2007 there was relatively little variation, but in the early months of 2015 unemployment ranged from 24% of those in Spain down to just 5% of those in both Austria and Germany.

Chart 9: Rate of unemployment (%)



Survey Methodology

Fieldwork for the survey took place in late January 2015 with 30,101 randomly selected citizens of the EU28 countries plus Turkey, the Former Yugoslav Republic of Macedonia, Iceland, Montenegro and Moldova being interviewed. Interviewing took place by telephone,

both landline and mobile.

Further Reading

The full 228-page report published by the European Commission can be found here:

http://ec.europa.eu/growth/tools-databases/newsroom/cf/itemdetail.cfm?item_id=8127

The report includes commentary and analysis, the full questionnaire and results broken down by demographic segment and country of residence for each country covered in the study.

Data Sources

Table 1: Data sources

Source	Charts/Tables
European Commission Survey on the Preferences of Europeans towards Tourism (March 2015)	Charts 1-7
Eurostat	Charts 8-9



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