

Europeans and Tourism - Autumn 2009

Analytical Report

Fieldwork: September 2009

Publication: October 2009

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 #281

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 281 on the “*Survey on the attitudes of Europeans towards tourism, Autumn 2009*”) was conducted at the request of Directorate General Enterprise and Industry to collect EU citizens’ views on travel, details of their (planned) holidays and travel in 2009 and their expectations regarding holidays in 2010. Special emphasis was put on the financial aspect of taking a holiday, as this is becoming a prime concern for both travellers and the tourism industry in the midst of the serious economic downturn affecting all EU economies.

This analytical report includes average results for the EU and highlights variations in responses based on interviewees’ country of residence, socio-demographic background and their 2009 travel destination (domestic or abroad). The different educational levels have been divided into those who finished their full-time education by the age of 15 (said to be *the lowest educational level*), between 16 and 20 years of age (*an average level of education*) or when they were aged 21 or older (*the highest level of education*).

The fieldwork was conducted from 7 to 11 September 2009. Over 24,000 randomly selected citizens aged 15 and over were interviewed in the 27 EU Member States. The sample size varied within Member States; in most countries the target sample size was 1,000 respondents, but 500 interviews were made in the smaller countries (please see the *Survey Details* section in the Annex for details of the actual sample sizes for the 27 countries).

Interviews were predominantly carried out by telephone. However, due to the low fixed-line telephone coverage in Bulgaria, the Czech Republic, Estonia, Latvia, Lithuania, Hungary, Poland, Romania and Slovakia, face-to-face (F2F) interviews were also conducted (70% telephone and 30% F2F interviews) in those countries.

To correct for sampling disparities, a post-stratification weighting of the results was implemented, based on the main socio-demographic variables. More details on the survey methodology are included in the Annex of this report (section *Survey Details*).

Main findings

- Overall, 63% of EU citizens had travelled or had plans to travel privately (i.e. take a holiday) in 2009. This was a four percentage point drop compared to the 67% who said they had done so in 2008 (according to an earlier 2009 Flash Eurobarometer on tourism¹).
- About half of EU citizens who went (or will go) on holiday in 2009 spent their main vacation in their own country. Compared to 2008, this represented a five percentage point increase.
- Due to the economic downturn, about 4 in 10 EU citizens indicated that they had cut back on the budget they allocated to their 2009 holiday(s); 40% of those respondents had done so by reducing the number of days spent away from home.
- About 1 in 10 (12%) EU citizens booked their holiday using a last minute offer – most of them (54%) did so in order to get a cheaper price.
- The overwhelming majority of respondents spent (or will spend) their 2009 holidays in conventional tourist destinations (74%).
- Just under half (44%) of respondents indicated that value for money was important when it came to deciding about a holiday destination or accommodation. Furthermore, price, was identified as being important by 27% of holidaymakers.
- 60% of respondents felt that they would be able to take a vacation away from home in 2010.
- Of those who had decided on the type of holiday they would take, a higher proportion of respondents planned a substantial holiday in 2010: 27% planned to have a long holiday, a five percentage point increase compared to the original plans that people had for 2009 (according to the earlier Flash Eurobarometer).

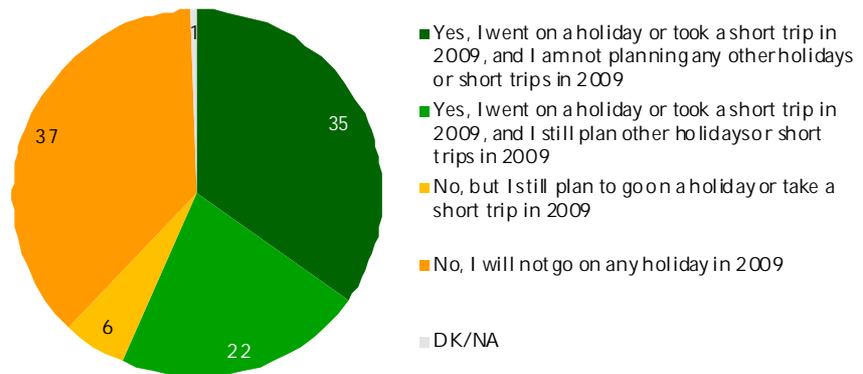
¹ Flash Eurobarometer 258, February 2009, http://ec.europa.eu/public_opinion/flash/fl_258_en.pdf

1. Vacations in 2009

1.1 Private travel in 2009

At the time of the survey, more than half of EU citizens had already travelled in 2009 for leisure purposes (57% either took a long holiday or made short private trips). Less than 1 in 10 EU citizens (6%) had not yet taken a vacation prior to the survey fieldwork (September 2009), however, they had plans to do so in the rest of the year. Overall, therefore, 63% had travelled or had plans to travel privately in 2009. An earlier Flash Eurobarometer study on the subject² established that 67% of the EU population had travelled for private purposes in 2008, which means that the current (projected) result represents a drop of four percentage points in the proportion of EU citizens who will, by the end of the year, have travelled for private purposes.

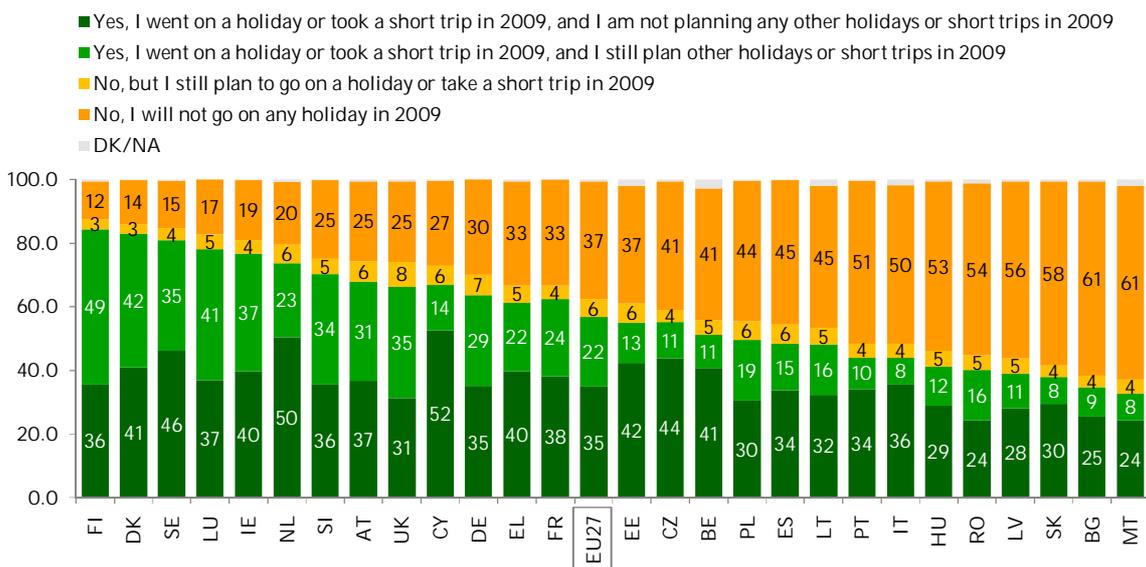
Holiday trips and short private trips in 2009



Q1. Did you go on a holiday or take a short private trip in 2009 where you were away from home for a minimum of one night? This excludes business travel. Base: all respondents, % EU27

Overall, 37% of respondents indicated that they had not travelled for private reasons in 2009 and did not intend to do so in the remainder of the year either.

Holidays and short private trips taken in 2009



Q1. Did you go on a holiday or take a short private trip in 2009 where you were away from home for a minimum of one night? This excludes business travel. Base: all respondents, % by country

² Flash Eurobarometer 258, February 2009, http://ec.europa.eu/public_opinion/flash/fl_258_en.pdf

In Finland and Denmark, almost 9 in 10 respondents (88% and 86%, respectively) indicated that they had travelled (or will travel) for private reasons during 2009. The corresponding figures for Sweden, Luxembourg and Ireland were 85% 83% and 81%. In Malta, on the other hand, only 37% of citizens had made (or planned) a trip in 2009. Other countries at the lower end of the distribution were Bulgaria (38%), Slovakia (42%), Latvia (44%), Romania (45%), Hungary (46%), Italy and Portugal (both 48%). In the rest of the Member States at least half of the respondents had already travelled or had plans to travel later in 2009.

Considering respondents' demographic profiles, the proportion of those not having taken a holiday or short trip (and with no plans to do this in the rest of 2009) has increased in all segments (the smallest increases were among metropolitan residents and those with a graduate level education).

Women, respondents over the age of 55, manual workers and those not working, and those living in rural areas were far less likely – compared to the EU average figures – to have travelled privately in 2009; with the exception of manual workers, these groups were also more likely to have reported that they travelled less than in 2008.

However, the interviewees least likely to have travelled privately were those with the lowest level of education: 63% of that group had not travelled for private reasons, compared to 22% of those with the highest level of education. The biggest drop in personal travel was also detected among the least educated: an 11 percentage point difference since 2008. A similar decrease was recorded among those aged 55 or over: the proportion of those not taking a holiday – of any kind – increased by 10 percentage points over a year.

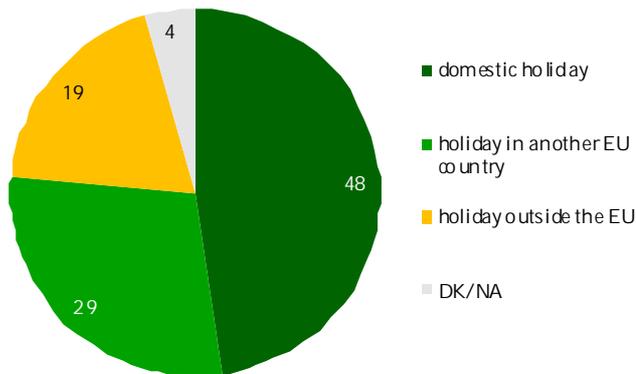
Changes in private travel, 2008-2009

	% did <i>not</i> travel privately	
	2008 (FL258)	2009 (FL281)
EU27	32	37
Male	30	34
Female	33	40
AGE: 15-24	25	25
AGE: 25-39	27	32
AGE: 40-54	31	34
AGE: 55+	38	48
Self-employed	23	29
Employees	20	23
Manual workers	44	42
Not working	39	46
Metropolitan zone	26	28
Other town/urban/centre	30	37
Rural zone	35	41
EDUCATION: <15 years of age	52	63
EDUCATION: 16-20	34	38
EDUCATION: 21+	18	22
EDUCATION: Still in education	22	24

1.2 Main holiday destinations

About half of EU citizens who went (or will go) on holiday in 2009 spent their main vacation in their own country (48%). Compared to the 2008 findings, this represents a five percentage point increase. Among respondents who travelled abroad, 29% went to another EU Member State (no change since last year). Holidaymakers were, however, less likely to select non-EU destinations; the 19% who had done so – or were planning to do so – in 2009 meant a six percentage point drop from the 2008 results.

Destination of respondents' main holiday in 2009



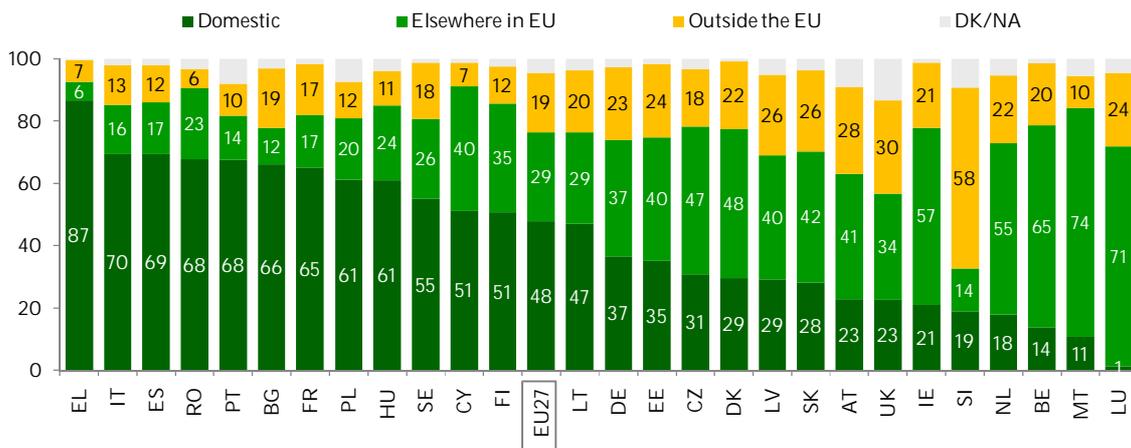
Q6. Where did / will you travel for your main holiday in 2009? If more than one place, where did you stay most of the time?
Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009, % EU27

Compared to the 2008 findings, this represents a five percentage point increase. Among respondents who travelled abroad, 29% went to another EU Member State (no change since last year). Holidaymakers were, however, less likely to select non-EU destinations; the 19% who had done so – or were planning to do so – in 2009 meant a six percentage point drop from the 2008 results.

Respondents living in the most popular tourist destinations (Greece, Italy and Spain) were the most likely among all EU citizens to have taken their holidays in their own country. A majority in Romania, Portugal, Bulgaria, France, Poland and Hungary also opted for a domestic holiday. In contrast, very few holidaymakers from the Benelux states (Luxembourg - 1%, Belgium - 14% and the Netherlands - 18%) and Malta (11%) opted for a holiday in their own country. Slovenia was the only EU Member State where most holidaymakers picked a destination outside the EU (predominantly Croatia); elsewhere, the most popular tourist destinations outside of a respondent's own country – were within the EU.

Bulgaria, France, Poland and Hungary also opted for a domestic holiday. In contrast, very few holidaymakers from the Benelux states (Luxembourg - 1%, Belgium - 14% and the Netherlands - 18%) and Malta (11%) opted for a holiday in their own country. Slovenia was the only EU Member State where most holidaymakers picked a destination outside the EU (predominantly Croatia); elsewhere, the most popular tourist destinations outside of a respondent's own country – were within the EU.

Destination of respondents' main holiday in 2009



Q6. Where did / will you travel for your main holiday in 2009? If more than one place, where did you stay most of the time?
Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009
% by country

Regardless of whether the destination was their own country or another EU Member State, Spain, Italy, and France were the countries where most Europeans said they took their vacation. Spain emerged as the undisputed top destination for foreign visitors, while France enjoyed a large number of domestic tourists (its population is larger than Spain's), making it Europe's favourite holiday destination overall.

The next chart shows the top countries where EU citizens spent (or will spend) their main 2009 holiday. The first list presents the top 10 destinations including domestic holidays, while the second one provides the favourite destinations for holidays spent abroad, i.e. away from the home country.

Top 10 holiday destinations, 2009
(% of all mentions)



Q6. Where did / will you travel for your main holiday in 2009? If more than one place, where did you stay most of the time?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009, % EU27

As mentioned, Spain, Italy and France were the top destinations within the EU. Croatia, Turkey and the USA were the non-EU countries that had the most significant share of visitors from the EU.

Looking at holidaymakers according to their broader **socio-demographic segments**, less educated respondents and manual workers or those not working were more likely to have spent their main holiday in their own country. For example, 58% of those with the lowest level of education stayed in their home country for their holiday, compared to 46% of those with the highest level of educational attainment.

Those who had spent their holidays in a different EU Member State had an opposite profile: they were typically aged 15 to 24, highly-educated or still in education and either self-employed or employees. For example, about a third of employees and self-employed holidaymakers visited another EU Member State for their main holiday break in 2009, compared to a quarter of manual workers (26%). (For more details, see Annex Table 7b.).

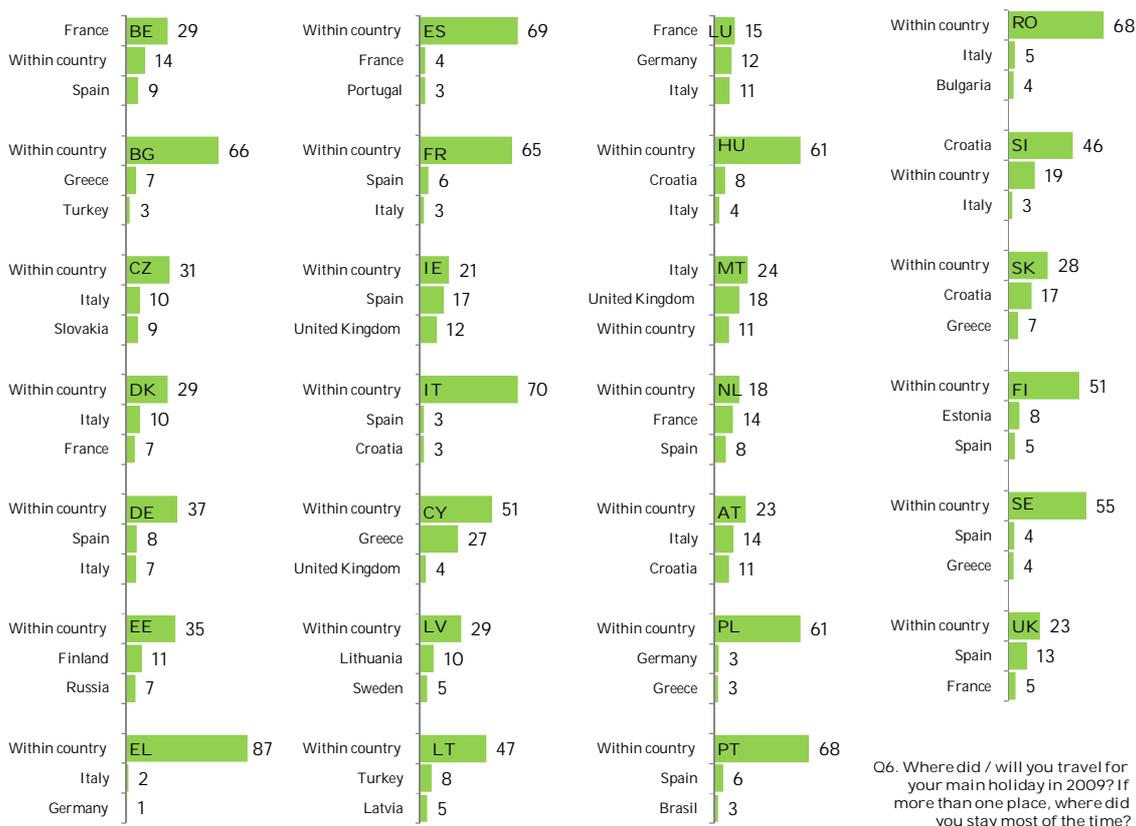
Destination of the main holiday by socio-demographic segments
(row %, base: 2009 holidaymakers)

	domestic	elsewhere in the EU	outside the EU	DK
EU27	48	32	19	1
Male	48	32	19	1
Female	48	32	19	1
Age: 15-24	43	36	19	1
Age: 25-39	51	29	19	2
Age : 40-54	46	33	21	1
Age: 55+	50	31	17	1
Self-employed	42	33	23	2
Employees	45	34	20	1
Manual workers	59	26	15	1
Not working	50	31	18	1
Metropolitan zone	45	32	22	1
Other town/urban/centre	49	30	19	2
Rural zone	48	34	17	1
Educ: -15 years of age	58	26	14	1
Educ: 16-20	49	31	18	1
Educ: 21+	46	33	21	1
Educ: Still in education	41	36	21	1

As already mentioned, respondents from France (65%) and Southern European countries – Portugal (68%), Spain (69%) Italy (70%) and Greece (87%) – were very likely to have spent their main 2009 holiday in their home country. These countries were, nevertheless, also popular holiday destinations among other EU citizens. For example, 14% of Austrians had visited Italy and 17% of Irish interviewees took a holiday in Spain (see chart below).

More than 4 out of 10 (46%) Slovenes travelled to Croatia. For Luxembourgers and Belgians, France was the most visited destination (15% and 29%, respectively). Finally, Italy was the most popular holiday destination for Maltese respondents (24%).

Destination of respondents' main holiday in 2009 (TOP3)



base: 2009 holidaymakers

1.3 Well-known vs. emerging destinations

The survey also inquired if respondents preferred traditional well-known destinations or the so-called emerging destinations when they chose a location for their main holiday.

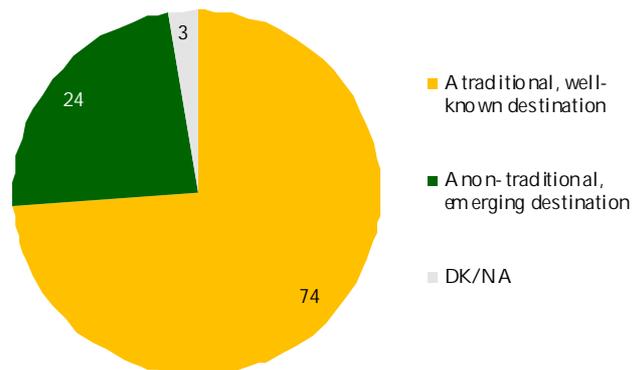
The overwhelming majority of respondents spent (or will spend) their holidays in **conventional tourist destinations** (or at least what they considered as ‘traditional’ or ‘well-known’ destinations, 74%). About a quarter of those who travelled, 24%, preferred to go **“off the beaten track”** and explored less obvious tourist targets – or have such plans in place. A few, 3%, could not or would not reply.

Obviously, this classification of destinations is completely dependent on a respondent’s judgement, and may reflect different viewpoints that exist in diverse social strata as well as in different countries.

Nevertheless, in each Member State, those who favoured a classic tourist destination heavily outnumbered those who favoured visiting “alternative”

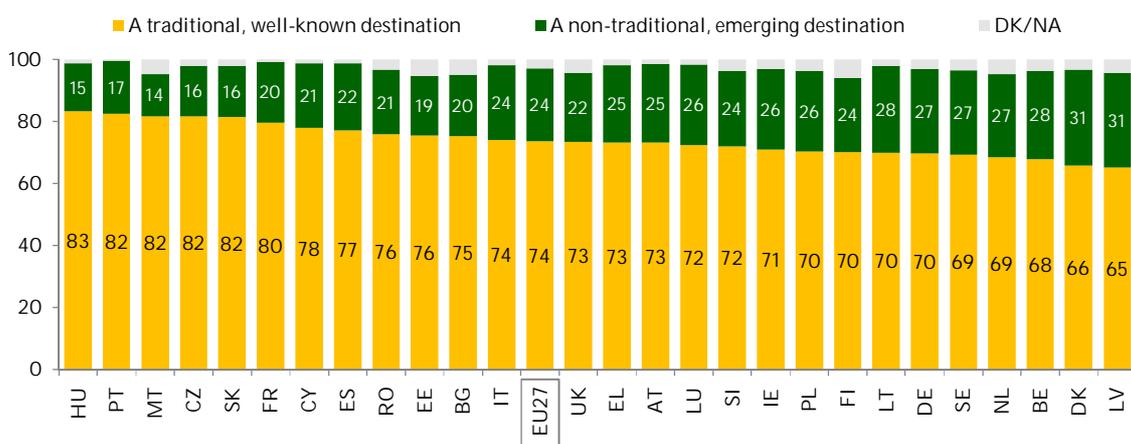
locations. Those who visited emerging destinations were primarily Latvian and Danish respondents (both 31%), but even in these countries more than twice as many travellers picked destinations that they considered traditional and well-known tourist targets. Countries with the highest numbers of respondents opting for traditional tourist destinations were Hungary (83%) and Portugal, Malta and the Czech Republic (82% each). In a number of other Member States (i.e. Slovakia, France, Cyprus, Estonia, Romania, Bulgaria and Italy), almost as many respondents - at least three-quarters - favoured traditional holiday locations.

Type of main holiday destination - 2009



Q7. In which type of destination did / will you spend your main holiday in 2009? If more than one destination, where did / will you stay most of the time?
Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009, % EU27

Type of main holiday destination - 2009



Q7. In which type of destination did / will you spend your main holiday in 2009? If more than one destination, where did / will you stay most of the time?
Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009, % by country

Traditional destinations also dominated the choice across all broad socio-demographic segments (see Annex Table 8b.). However, there were some clear tendencies, e.g. established destinations were preferred by older age groups (e.g. 75% among those older than 54 vs. 70% of 15 to 24 year-olds). On the other hand, emerging destinations were favoured somewhat more by young Europeans (28% of 15-

24 year-olds vs. 22% of those aged 40 and above). Of those with the lowest level of education, one in five respondents (19%) would travel to alternative destinations vs. a quarter (25%) of the most educated ones.

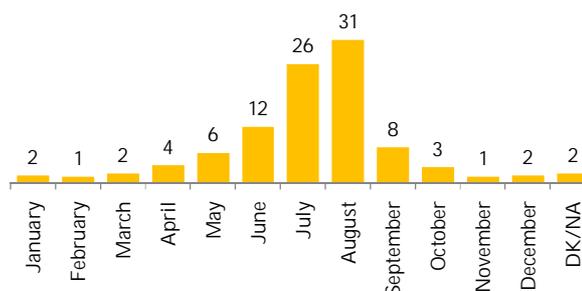
Those who had their main holiday in their own country were most likely to rate their destination as traditional or well-known (78%), while those who left the EU for their vacation were most liable to feel that they went to an emerging, non-traditional destination (30%).

1.4 Vacation scheduling

The vast majority (83%) of EU citizens started (or will start) their main 2009 holiday in the period between May and September; furthermore, July and August were the most popular months (selected by 26% and 31%, respectively).

Vacation scheduling was strikingly similar across all EU Member States. In 21 out of 27 countries, a majority of holidaymakers took their main holiday in July or August.

Preferred month for starting the main holiday



Q5. In which month of 2009 did / will you start your main holiday?
 Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009, % EU27

Choice of time when holiday was taken in 2009, by holidaymakers' demographics (row %, base: 2009 holidaymakers)

	July-August	Rest of the year	DK
EU27	56	41	2
Male	55	42	2
Female	57	41	2
AGE: 15-24	64	35	2
AGE: 25-39	61	38	1
AGE: 40-54	62	36	2
AGE: 55+	43	54	3
Self-employed	58	40	2
Employees	59	39	2
Manual workers	53	45	2
Not working	57	41	3
Metropolitan zone	60	39	1
Other town/urban/centre	62	37	1
Rural zone	52	45	3
EDU: -15 years of age	48	49	3
EDU: 16-20	54	44	2
EDU: 21+	59	39	2
EDU: Still a student	67	31	2

Main holiday in 2009:

Domestic	67	31	2
Elsewhere in EU	52	46	2
Outside the EU	40	59	1

The socio-demographic analysis of the results shows that the youngest EU citizens, the more educated and those who spent their holiday in their own country were more likely to have gone on holiday in 2009 in July or August (as the table to the left illustrates). Probably due to the timing of school holidays, the youngest respondents and students were most likely to have taken a holiday in the two summer months (64% and 67% respectively).

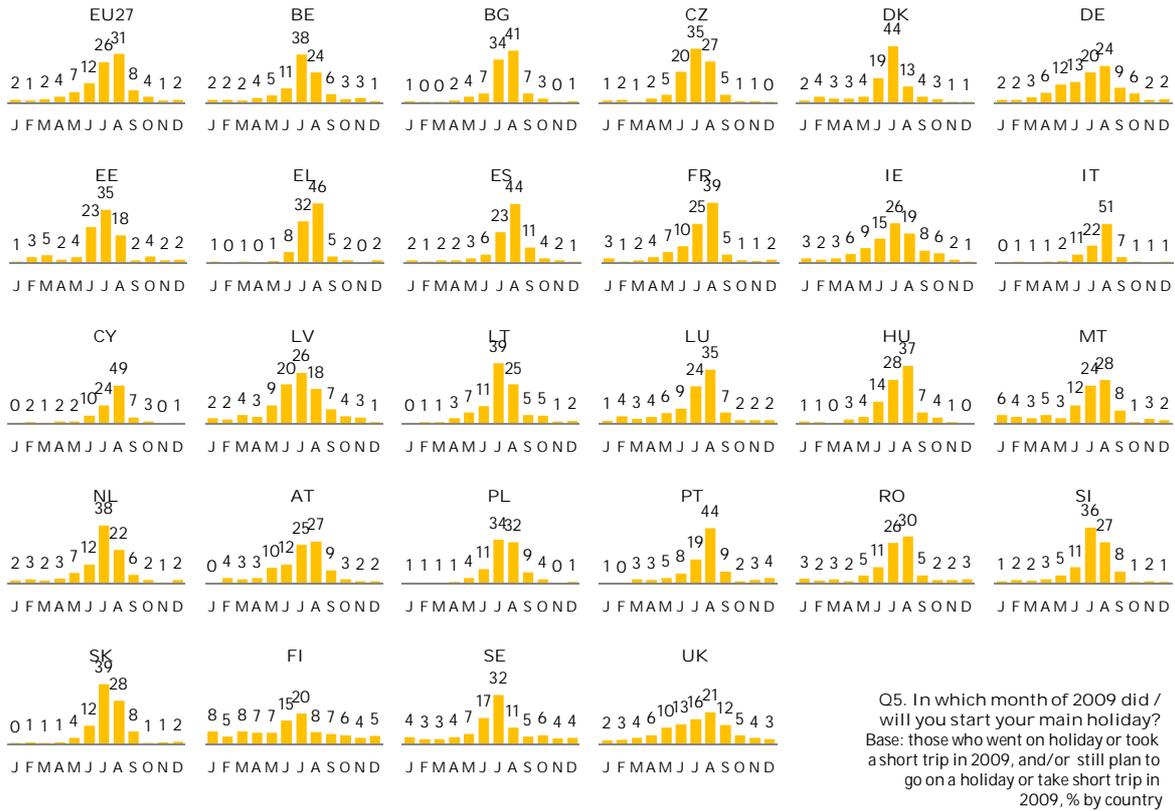
Off-peak holidays tended to be preferred by interviewees who were over 54 or who had the lowest level of education.

The majority of those who travelled outside the EU for their vacation did so out of the peak season (59%); those who had their vacation elsewhere in the EU were also more likely than EU citizens on average to schedule their holiday before or after the busiest months of the year.

The preference for going on holiday in these two summer months was particularly noticeable among holidaymakers from Bulgaria, Slovakia, Italy, Greece and Cyprus where at least 7 in 10 chose July or August for their main holiday (see chart below). High numbers of Portuguese and Slovene (both 68%), Polish (65%), Hungarian and French (both 64%) respondents also went on holiday during the peak season.

In six Member States, respondents' holidays appeared less concentrated in July and August 2009, but were more evenly distributed throughout the year (i.e. more vacations took – or will take – place before or after the peak season): Finland (65%), the UK (62%), Germany (57%), Ireland and Latvia (both 55%) and Sweden (51%),

Preferred month for starting the main holiday in 2009

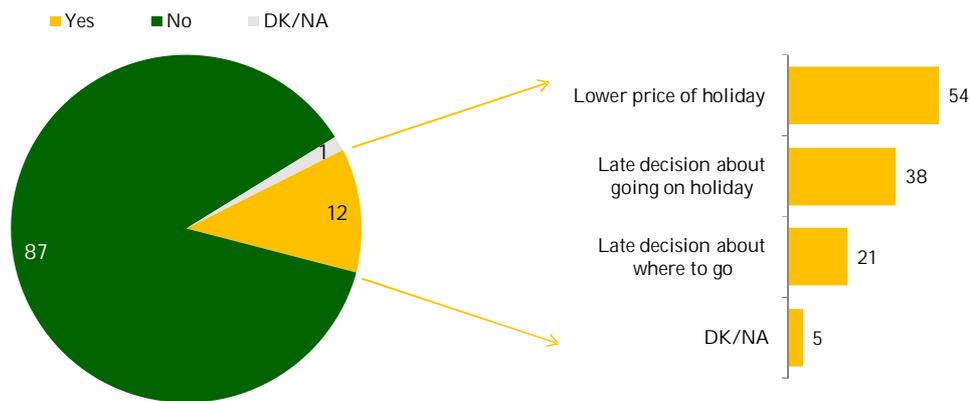


However, even in those countries, the most popular months to take a main holiday were in the peak summer season (July and August), with a relatively high number also starting their trip in the early or late summer. Estonia stood out as having an earlier holiday season than other countries, with about a quarter of holidaymakers starting their holidays in June (23%) while only 18% did so in August.

1.5 Popularity of “last minute” travel

About 1 in 10 (12%) European travellers booked their holiday using a last minute offer – most of them (54%) did so in order to get a cheaper price. Over a third (38%) indicated that they took a late decision about the *holiday* itself (whether to go or not) and one in five (21%) cited a “last minute” decision on the actual *destination*.

Booking the main holiday in 2009 via a last-minute offer



Q8. Did / will you book your main holiday via a last-minute offer?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

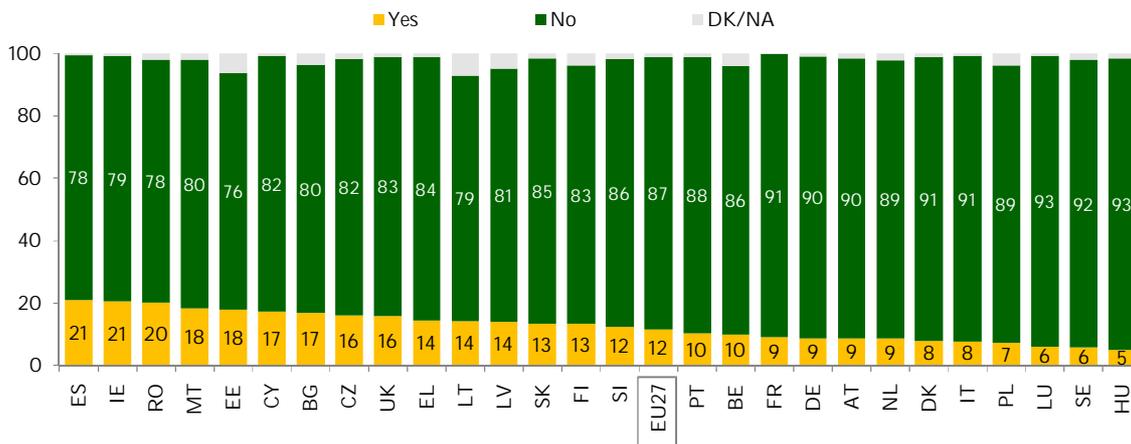
Q9. Why did / will you do so?

Base: those who booked/will book main holiday via a last-minute offer

% EU27

About one in five respondents in Spain and Ireland (both 21%), Romania (20%), Malta and Estonia (both 18%) booked their main 2009 holiday on a last minute basis, while only a handful of interviewees in Hungary (5%), Sweden and Luxembourg (both 6%) respondents used such opportunities.

Booking the main holiday in 2009 via a last-minute offer



Q8. Did / will you book your main holiday via a last-minute offer?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

% by country

Variations according to socio-economic segments remained extremely limited, as shown in Annex Table 9b. Only age seemed to have an impact: the youngest EU citizens were almost twice as likely (15%) as the oldest (8%) to book their holiday at the last minute. Also, those who travelled outside the EU were more likely than others to take advantage of a last minute offer (15%), while domestic travellers were slightly more likely than the average to book in advance.

The reasons cited for booking at the last minute were more or less uniform and reflected EU27 average figures: lower price came first, a late decision about going on holiday was in second place and a late decision about the destination came third.

As the table shows, this pattern characterised the responses in most Member States, except for Austria, Sweden, Finland and Luxembourg (where a late decision on taking a vacation came in first place) on the one hand, and Bulgaria and Cyprus on the other (where a late decision on the destination was the second most frequent reason for opting for last minute travel).

Even if the ranking of the reasons was more or less universal, cost considerations in booking last minute offers were much more prevalent in some central and Eastern European Member States (Latvia and Hungary: 82%, Lithuania: 80%, Czech Republic: 75%, Slovakia: 71%, Estonia 70%).

On the other hand, there were only minor differences between looking for a cheap holiday and making a late decision about going on holiday (which might also be related to cost concerns) in Germany, Greece, France, Italy, Austria, Romania, Finland and the UK. (See also Annex Table 10a.).

Annex Table 10b. shows that the socio-segments that tended to look for last minute offers *because of a price advantage* were the oldest respondents (aged 55 or over: 60%) and the least educated (68%). Metropolitan citizens were also more likely to state that they preferred a last minute option because of the possible savings (62% vs. 50% in rural areas.)

The other predominant reason – a late decision about taking a holiday – was mentioned more often than average by men, and by a majority of

those aged 15 to 24 (as well as those still in education). Self-employed persons were also much more likely than EU citizens on average (38%) to mention that they used last minute offers because they were late deciding if they wanted to go (or were able to go) on vacation (48%).

Reasons for booking last minute holidays

(row %, base: 2009 holidaymakers)

	Lower price was available	Late decision about going on holiday	Late decision about where to go
EU27	54	38	21
BE	52	38	10
BG	45	21	40
CZ	75	23	9
DK	56	26	14
DE	46	40	21
EE	70	24	9
EL	36	30	24
ES	63	21	17
FR	52	47	16
IE	67	39	28
IT	57	50	9
CY	53	22	39
LV	82	6	7
LT	80	5	12
LU	10	56	29
HU	82	12	9
MT	44	39	22
NL	49	37	32
AT	42	44	15
PL	59	33	11
PT	59	29	19
RO	37	36	26
SI	64	30	10
SK	71	17	4
FI	43	47	22
SE	37	41	13
UK	56	52	33

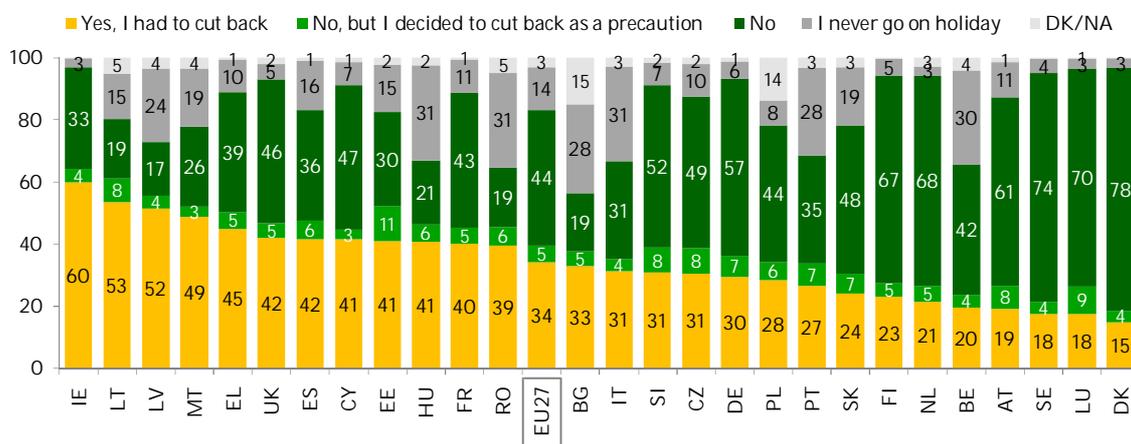
2. Vacation spending

2.1 Cutting back on travel budgets

The contraction of the EU tourism market has two major components: a slightly shrinking number of EU citizens travelling *at all* (see section 1.1) and a diminishing amount of money that travellers can allocate to their holiday budget. This section looks at whether and how EU citizens' travel budgets were affected by the current economic downturn in 2009.

Amidst the current economic downturn, about 4 in 10 EU citizens indicated that they had cut back on the budget they allocated to their holiday(s) in 2009: most did so simply because they lacked the necessary finances and they *had to* cut back (34% of all people interviewed) and some made voluntary restrictions on the budget (5%) as a precaution in the unfavourable economic environment.

Cutting back on 2009 holiday budgets?



Q2. Under the current economic conditions, did you have to cut back in 2009 on the budget that you normally spend on holiday?
Base: all respondents, % by country

At the same time, almost half (44%) of those interviewed across the EU did not have to adapt their travel budgets and a further 14% said that they never went on holiday; 3% did not or could not answer the question.

More than half of Irish (60% of those interviewed), Lithuanian (53%) and Latvian (52%) respondents indicated that they had had to reduce their travel budgets. Focusing the analysis on actual and potential holidaymakers (i.e. ignoring those who said they never go on vacation), we found that Latvians came on top with 70% having reduced their 2009 holiday budget (followed by 67% of Lithuanians and 61% of Irish), and that situation was also widespread among potential holidaymakers from Malta (63%), Romania, Hungary (both 61%) and Bulgaria (58%).

Respondents in their economically most active ages in particular indicated that they had to cut back on their vacation spending (25 to 39 year-olds: 42%, 40 to 54 year-olds: 39%); in addition, those with an average education (39%) and manual workers (47%) were much more likely than average to indicate that they had a reduced travel budget. Youngest EU citizens frequently reported a stable budget situation (51%), as did the most educated (53%), the self-employed (50%) and employees (49%).

The relationship between the selection of the holiday destination and cost-cutting was evident: 45% of those who took a holiday in their own country indicated that they had to reduce their budget, compared to a third (34%) of those who travelled within the EU and 28% of those who took a vacation outside the EU. Regardless of the holiday destination, the proportion of holidaymakers who *had not had to* adjust their budget was higher than the proportion of those who *had had to cut back* in 2009, indicating that many in the latter group may eventually have taken not holiday at all. (Annex Table

2b.)

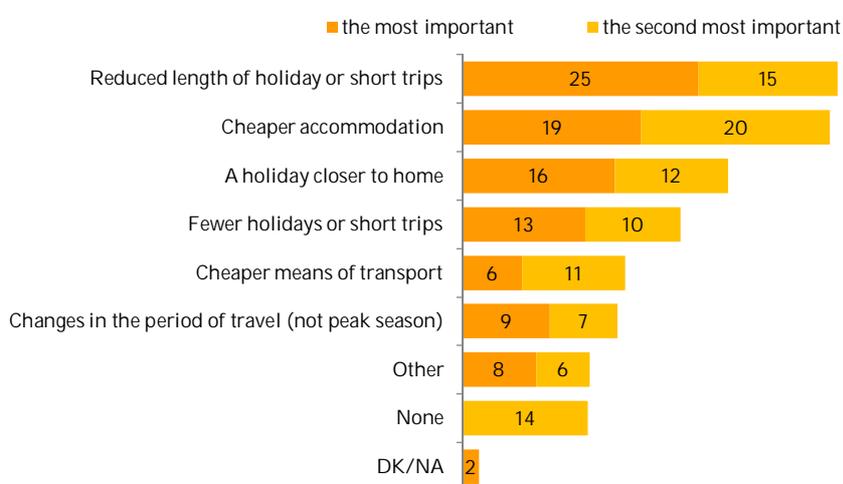
2.2 Ways to reduce vacation spending

EU citizens who had reduced their 2009 travel budget were asked how they had made their actual savings – each respondent being asked to give two examples: a quarter said they had reduced the length of their holiday in the first place and 15% made this their second method of saving – so, overall, 40% of those who had reduced their holiday budget did so by cutting the number of days they spent away from home.

Almost as widespread a strategy was to make compromises on accommodation: 39% cited cheaper accommodation as a way cutting costs and 28% picked a destination closer to home (36% of those who took a domestic vacation and cut their travel budget saved money by doing this).

About a quarter of respondents (23%) reduced the number of trips they made or will make in 2009 and 17% used less expensive means of transport. About one in six (16%) mentioned that they took holidays in the off-peak season and a similar number (14%) used other strategies to reduce their vacation expenses.

Ways of cutting back on the 2009 holiday budget



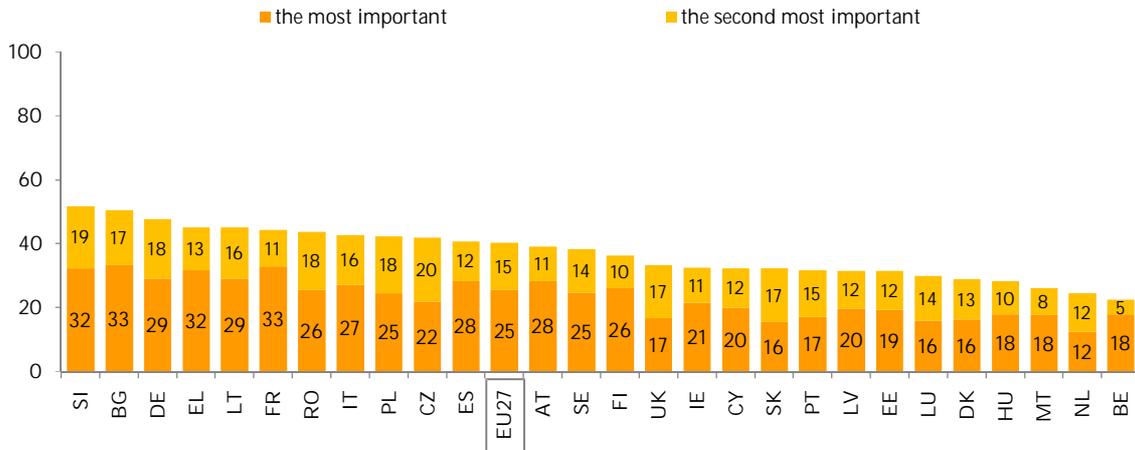
Q3a. How did you / will you cut back on your holiday budget in 2009?
What was / will be the most important change that you made / will make?

Q3b. And what was / will be the second most important change?

Base: those who went on holiday or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution, % EU27

Ways of cutting back on the 2009 holiday budget

Reduced length of holiday or short trips



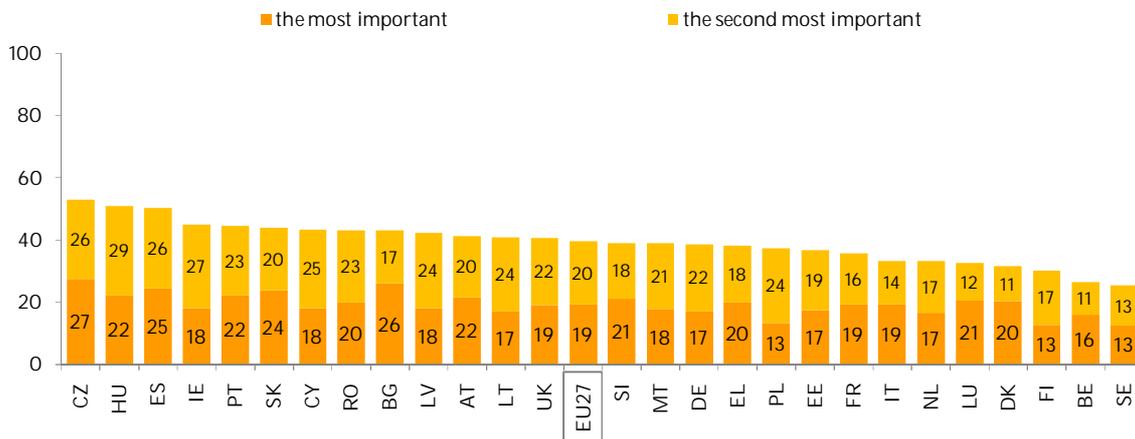
Q3a. How did you / will you cut back on your holiday budget in 2009? What was / will be the most important change that you made / will make?
 Q3b. And what was / will be the second most important change?
 Base: those who went on holiday or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution, % by country

A shorter time spent on holiday was the most popular way of cutting costs for Slovene (51% mentioned this as one of the two most important ways of reducing expenses), Bulgarian (50%), German (47%) and Greek (45%) respondents. A third of holidaymakers in Bulgaria and France (both 33%), Slovenia and Greece (both 32%) mentioned this strategy as being the “most important” way of reducing the amount they spent on holiday.

Curiously, some of the countries where respondents had been more likely to say that they had had to cut back on holiday expenditures were among the least likely to reduce the length of their vacation: only 26% of respondents in Malta and 28% in Hungary did this to save money. Overall, Belgian respondents were the least likely to adopt such a strategy (23%).

Ways of cutting back on the 2009 holiday budget

Cheaper accommodation

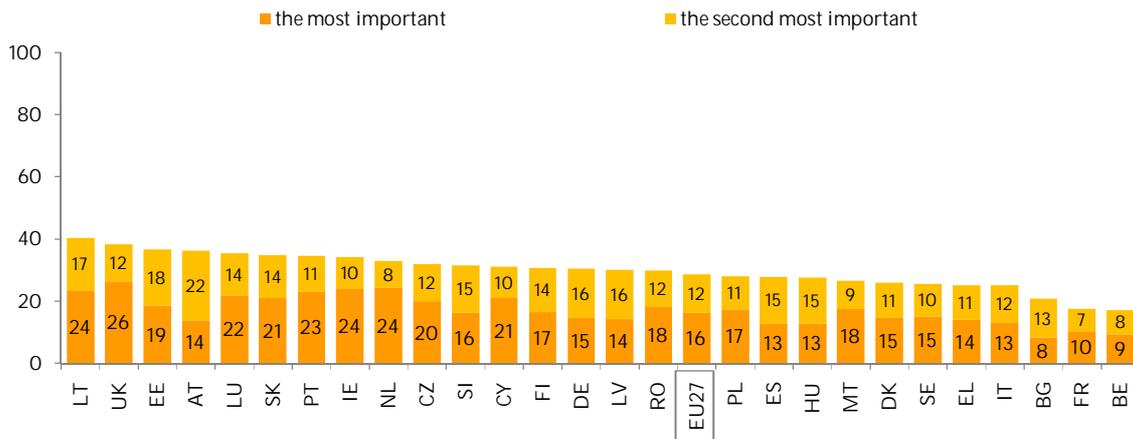


Q3a. How did you / will you cut back on your holiday budget in 2009? What was / will be the most important change that you made / will make?
 Q3b. And what was / will be the second most important change?
 Base: those who went on holiday or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution, % by country

Saving on accommodation was reported by over half of holidaymakers from the Czech Republic (53%), Hungary and Spain (both 51%). The least likely to adopt this approach were Swedish (26%), Belgian (27%) and Finnish (30%) respondents.

Ways of cutting back on the 2009 holiday budget

A holiday closer to home



Q3a. How did you / will you cut back on your holiday budget in 2009? What was / will be the most important change that you made / will make?

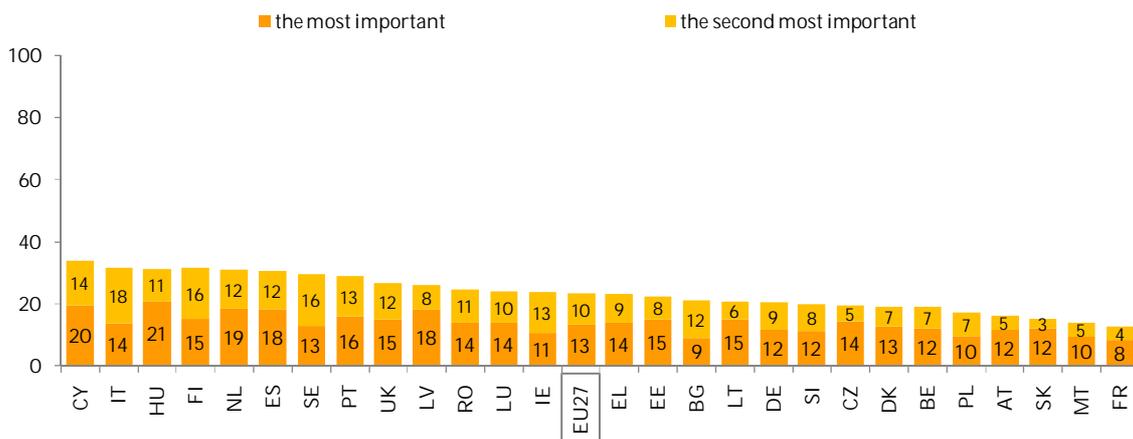
Q3b. And what was / will be the second most important change?

Base: those who went on holiday or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution, % by country

Reducing the distance travelled in order to cut costs was most frequently one of the top two strategies for Lithuanian (41%), British (38%) and Estonian (37%) holidaymakers. This option was least frequently considered by respondents in Belgium and France (both 17%) and Bulgaria (21%).

Ways of cutting back on the 2009 holiday budget

Fewer holidays or short trips



Q3a. How did you / will you cut back on your holiday budget in 2009? What was / will be the most important change that you made / will make?

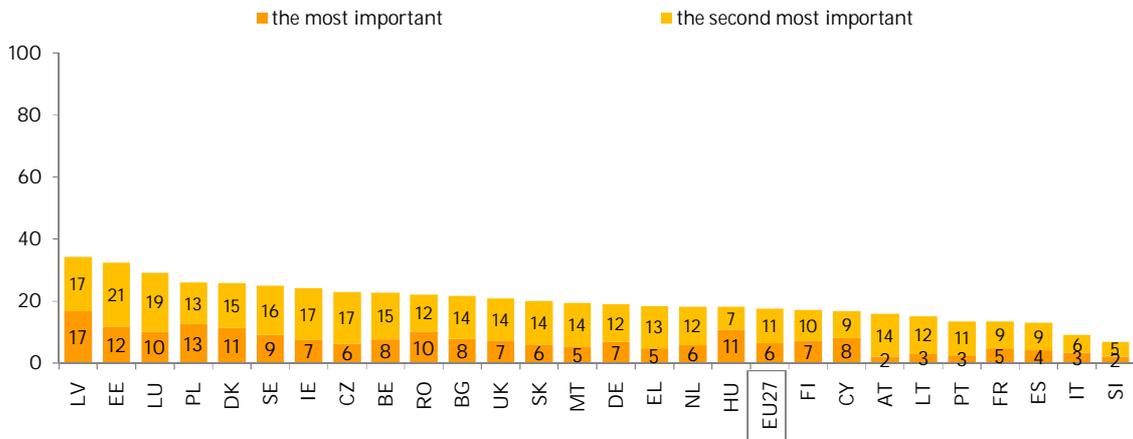
Q3b. And what was / will be the second most important change?

Base: those who went on holiday or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution, % by country

Cypriots (34%), Italians and Hungarians (both 32%) and Finns (31%) were the respondents most often opting to make fewer trips in 2009 in order to reduce costs. This strategy was least popular in France (12%), Malta and Slovakia (both 15%).

Ways of cutting back on the 2009 holiday budget

Cheaper means of transport

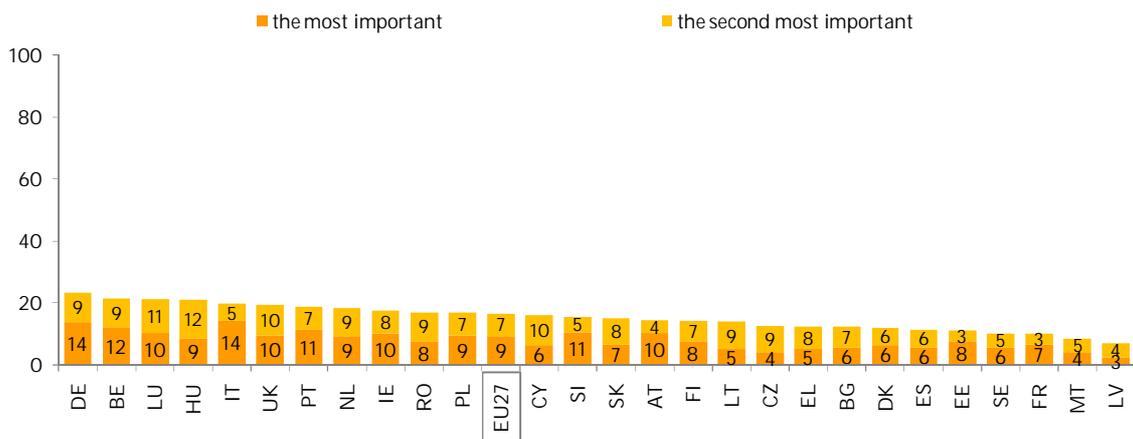


Q3a. How did you / will you cut back on your holiday budget in 2009? What was / will be the most important change that you made / will make?
 Q3b. And what was / will be the second most important change?
 Base: those who went on holiday or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution, % by country

Finding cheaper means of transport was not one of the main methods of reducing holiday expenses, this was most frequently mentioned in Latvia (34%), Estonia (33%) and Luxembourg (29%). On the other hand, very few travellers from Slovenia (7%) and Italy (9%) confirmed savings (or being able to save) on transport costs.

Ways of cutting back on the 2009 holiday budget

Changes in the period of travel (not peak season)



Q3a. How did you / will you cut back on your holiday budget in 2009? What was / will be the most important change that you made / will make?
 Q3b. And what was / will be the second most important change?
 Base: those who went on holiday or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution, % by country

About one in five respondents in Germany (23%), Hungary, Belgium and Luxembourg (all 21%) decided to save money by travelling outside the peak season. This approach was hardly seen in Latvia (7%), Malta (9%) or France (10%).

As the accompanying table shows, there were few variations in the adopted strategies across the various socio-demographic segments. However, the older the respondent, the less likely they were to compromise on quality (e.g. 15

to 24 year-olds would choose cheaper accommodation or a cheaper means of transport, while those older than 54 tended to avoid this option, 46% and 31%, respectively). Respondents aged 40 or older tended to opt for a shorter stay instead. Young adults (25 to 39) were more likely than the average to opt for a vacation closer to home (32% and 29%, respectively).

Respondents with the highest education level were the most open to the idea of saving on accommodation, and were also the most likely to take a vacation in the low season (see Annex Tables 3b. and 4b.).

Ways of cutting back on holiday budget

(%, sum of “most important” and “second most important” answers, base: holidaymakers who reduced their holiday budget)

	Fewer holidays or short trips	Reduced length of holiday or short trips	Cheaper means of transport	Cheaper accommodation	A holiday closer to home	Changes in the period of travel (not peak season)	Other	DK/NA
EU27	24	41	18	40	29	17	14	2
Male	24	42	17	41	28	17	12	2
Female	24	39	18	39	29	17	15	2
15 - 24	21	36	28	46	28	18	9	3
25 - 39	23	38	17	42	32	18	13	1
40 - 54	25	45	15	42	28	15	13	1
55 +	24	42	14	31	26	17	18	3
Domestic	23	44	13	40	36	12	13	2
EU	24	38	23	42	22	20	13	2
Non-EU	23	35	22	36	16	27	18	2

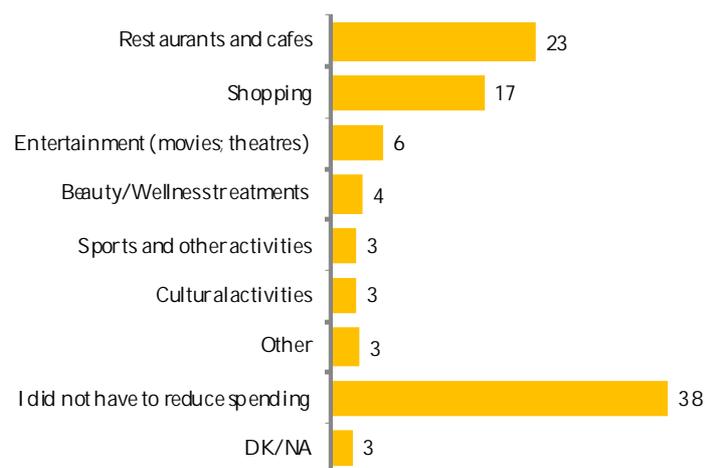
Reducing the length of stay was most often the choice of respondents taking domestic holidays (44%), while using a cheaper means of transport was primarily a technique used by those who travelled abroad (22% to 23%). Domestic travellers were less likely to opt for off-season travel (12%), compared to more than a quarter (27%) of those who took a vacation outside the EU. On the other hand, this latter group was the least likely to make compromises regarding accommodation and the length of stay. Obviously, many more domestic travellers (36%) hinted that they had decided for a destination closer to home in order to cut costs – compared to, for example, 16% of those who travelled outside of the EU.

2.3 Actual cuts in 2009 expenditures on leisure activities

38% of respondents who had already travelled for private reasons in 2009 did not have to reduce their spending on leisure activities associated with their holiday. Most respondents, when asked about their holidays, indicated that they had to cut (or decided to cut) their travel and holiday expenses.

For respondents who had completed their 2009 holidays, the most popular way of making savings was cutting back on eating and drinking (23%). A further 17% said they had reduced the amount of shopping they did on holiday with other methods being infrequently selected as the main way of reducing costs: 6% mentioned cutting back on entertainment, 4% said they spent less on beauty/wellness treatments and 3% - in each case – mentioned cut-backs on sports activities, cultural outings or indicated other sources of savings.

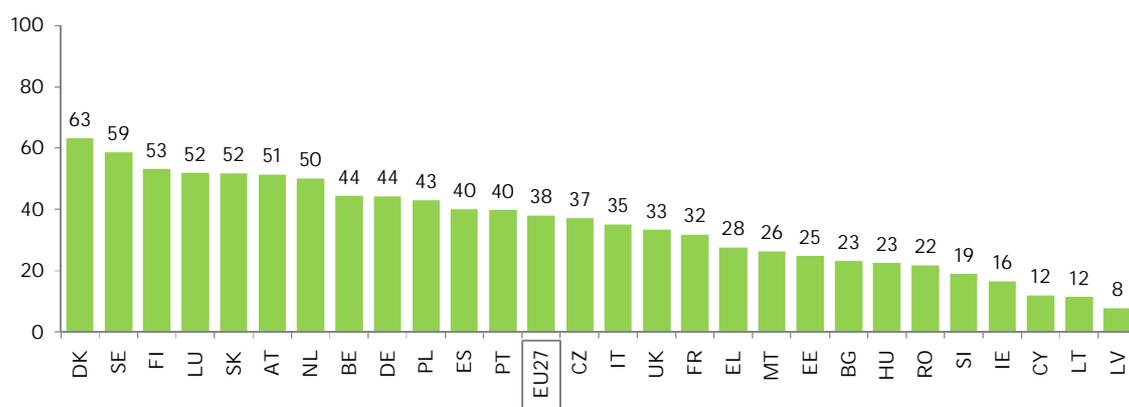
Type of leisure activities where respondents made the most savings



Q4. If you had to reduce your spending on leisure activities when you were on holiday in 2009, on which kind of leisure activity did you make the most important reduction?
Base: those who went on holiday or took a short trip in 2009, and not planning any other holiday or short trips in 2009, % EU27

It should be noted that the question asked about respondents' main method of reducing the cost of their leisure activities (see full questionnaire in the Annex part III); the above results, therefore, do not mean that expenses on sports or cultural activities were less frequently reduced than those on restaurants or cafés, only that the former led to less savings than the latter.

No reductions in holiday expenditure were necessary



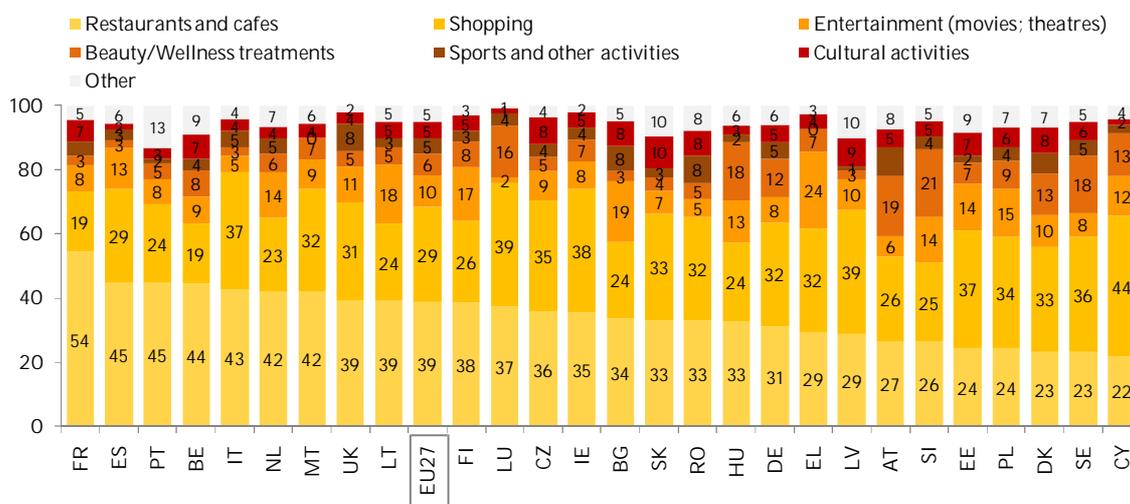
Q4. If you had to reduce your spending on leisure activities when you were on holiday in 2009, on which kind of leisure activity did you make the most important reduction?
Base: those who went on holiday or took a short trip in 2009, and not planning any other holiday or short trips in 2009, % by country

As for country results, the most profound difference was found in the proportion of holidaymakers who indicated that they *did not have to cut back* on leisure expenses associated with holidays or other private travel. Only in Denmark and Sweden did a clear majority of holidaymakers (63% and 59%, respectively) indicate that they had not had to cut back on such costs.

In five further Member States (Finland, Luxembourg, Slovakia, Austria and the Netherlands), about half of respondents confirmed that they had not had to reduce such spending; in all other countries

only a minority answered in that way. Latvia (8%), Lithuania and Cyprus (both 12%) and Ireland (16%) had the lowest numbers of respondents who could afford not to cut back on leisure activities.

Type of leisure activities where respondents made the most savings



Q4. If you had to reduce your spending on leisure activities when you were on holiday in 2009, on which kind of leisure activity did you make the most important reduction?
Base: those who went on holiday or took a short trip in 2009, and not planning any other holiday or short trips in 2009, and provided a leisure activity, % by country

The chart above shows for each country the most frequently mentioned holiday leisure activities on which respondents made the most significant cutbacks – discounting those who had not reduced spending in any way. At first glance, interviewees in a majority of EU Member States selected the same two leisure activities to make the most significant cuts: *eating out* (most prominently by respondents in France, Spain and Portugal) and *shopping* (particularly in Luxembourg, Latvia, Ireland, Italy and Estonia) – these two categories combined accounted for at least 50% of replies in all EU Member States.

Greek holidaymakers most often stated that their reduced spending on *entertainment* led to sizeable savings in their holiday budget (24%), and such replies were also above the EU average in Bulgaria (19%), Lithuania (18%) and Finland (17%). Cutting back on *beauty treatments / wellness* expenses was most often quoted as an important way of reducing holiday spending in Slovenia (21%), Austria (19%), Hungary and Sweden (both 18%).

As Annex Table 5b. clarifies, such reductions on the money spent on leisure activities while on vacation were less frequent among men (41%), holidaymakers over the age of 55 (44%), and the most educated (42%). On the other hand, manual workers were the most likely to report such reductions (only 29% had not saved money on leisure activities).

3. Factors considered when deciding about destinations

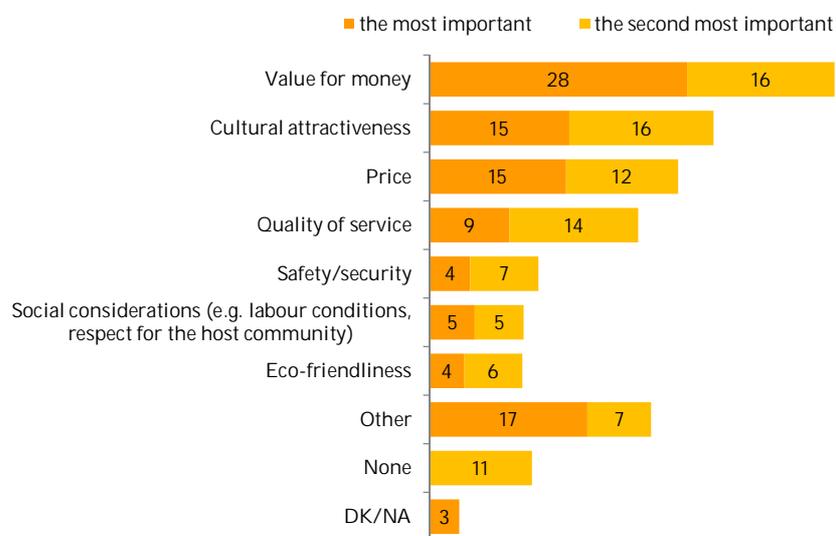
3.1 Main considerations

Respondents were asked to name the two most important factors that had an impact on their choice of holiday destination or accommodation. *Value for money* was identified as the most important consideration by 28% of EU citizens, while 16% of respondents put this aspect in second place. Overall, therefore, 44% of respondents indicated that value for money was important when it came to deciding about a holiday destination or accommodation. Furthermore, price in itself was identified as being important by 27% of holidaymakers.

Cultural attractiveness was considered important by 31% of respondents, with service quality being a key consideration for a further 23%. Other aspects, as shown below, were rarely mentioned among the key factors that holidaymakers considered when making decisions: 11% considered safety & security matters and 10% opted for social conditions, including respect for the host community, and a similar number mentioned eco-friendliness.

A quarter of respondents mentioned other considerations than the proposed options when deciding on their 2009 holiday plans; these included a beautiful location, a previous good experience, a recommendation from friends or family members, and good travel connections.

The most important factors when deciding on holiday destination or accommodation - 2009



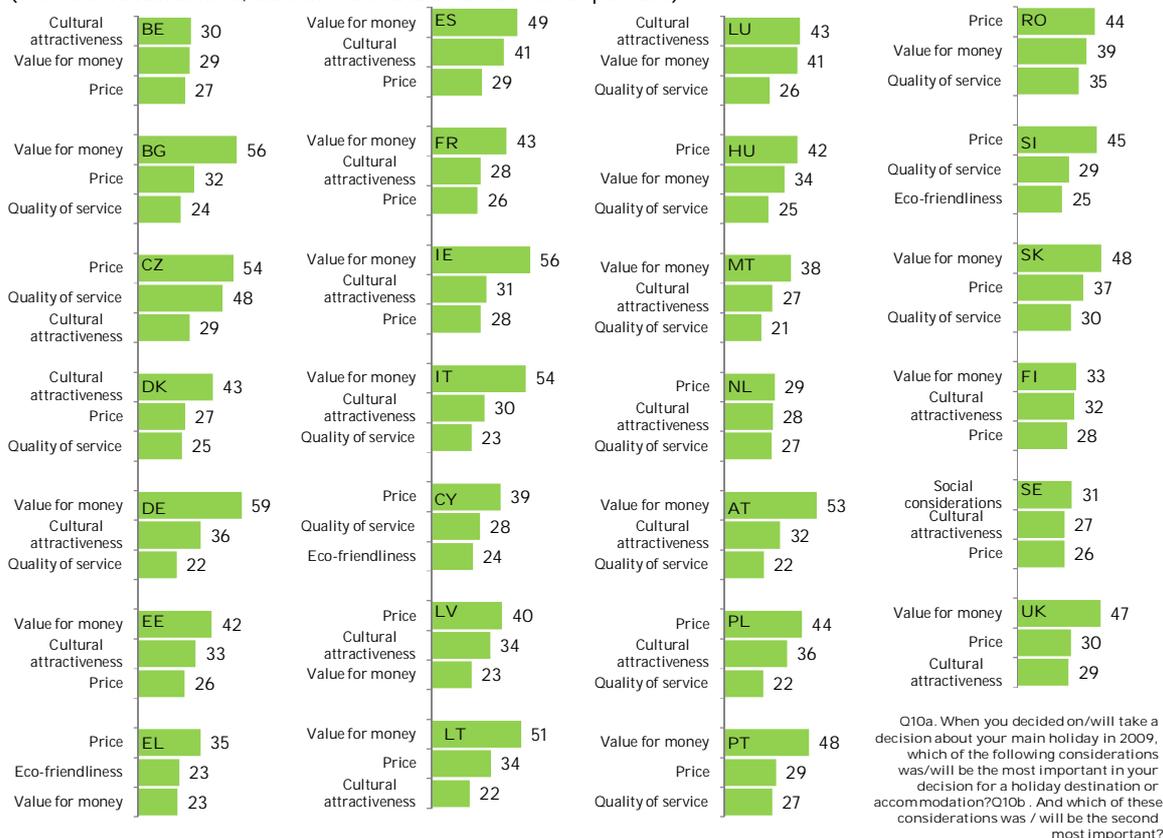
Q10a. When you decided on / will take a decision about your main holiday in 2009, which of the following considerations was / will be the most important in your decision for a holiday destination or accommodation?

Q10b. And which of these considerations was / will be the second most important?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009, % EU27

As the chart below shows, in a majority of Member States (14), respondents considered *value for money* as the most influential decision-making factor. Price (i.e. a low cost) was the primary consideration in nine countries (most of them among the Member States that joined the EU in 2004 or since).

The most important factors when deciding on holiday destination or accommodation - 2009
(TOP 3 considerations, sum of most and second most important)



base: 2009 holidaymakers

Price stood out as the key factor or as an overriding concern in countries where, proportionally, the lowest number of people took (or planned to take) a 2009 holiday – indicating that often, the reason for not going on holiday was a lack of disposable income. Countries where price was clearly the main concern were the Czech Republic (54% mentioned price; 41% did not or will not go on holidays in 2009), Slovenia (45% and 25% respectively), Romania (44%; 54%), Poland (44%; 44%), Hungary (42%; 53%) and Latvia (40%; 56%). On the other hand, value for money was a more important consideration in countries such as Germany, Ireland, Austria, Italy and Lithuania.

Cultural attractiveness of the destination dominated the choice of Luxembourgish, Belgian and Danish holidaymakers, while in Sweden – even if marginally – socially responsible holidays came top. Dutch holidaymakers were divided, as most decision-making factors were used by more or less equal-sized groups; marginally, a relative majority is price sensitive.

As for the socio-demographic segments, considerations varied to a slight extent (see Annex Table 11b. and 12b. and the summary table below). In each group, value for money was the prime consideration. Price in itself was most frequently chosen by the youngest respondents and manual workers, but even in these segments, value for money was the key factor when it came to choosing a vacation destination or accommodation.

Domestic travellers appeared more focused on cost, while those who travelled abroad for their vacation were much more likely to seek an element of cultural attractiveness in their holiday location.

Most important factors when deciding on 2009 holiday destination or accommodation

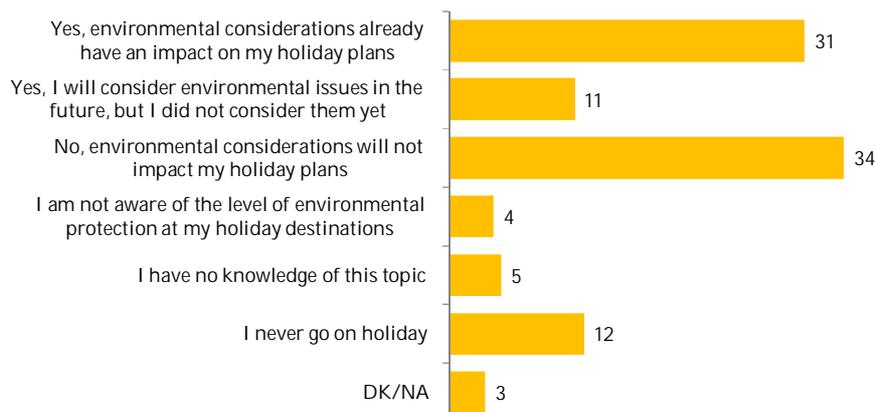
(row %, sum of “most important” and “second most important” answers for each category, among 2009 holidaymakers)

	Quality of service	Price	Value for money	Cultural attractiveness	Eco-friendliness	Social considerations	Safety/security	Other	DK/NA
EU27	23	27	44	31	10	10	12	24	3
SEX									
Male	23	26	44	30	10	10	11	24	4
Female	23	28	44	31	10	10	12	24	3
AGE									
15 - 24	23	34	45	32	8	12	13	18	3
25 - 39	23	30	48	30	10	9	11	22	3
40 - 54	23	27	44	31	10	9	11	26	3
55 +	22	20	39	31	11	11	12	28	4
EDUCATION (end of)									
Until 15 years of age	26	26	43	22	10	9	11	26	4
16 - 20	23	29	44	28	10	9	13	24	3
20 +	21	23	46	36	10	11	10	26	3
Still in education	24	34	42	32	9	13	12	15	5
URBANISATION									
Metropolitan	21	27	42	33	9	10	12	26	4
Urban	23	28	42	30	10	11	12	24	3
Rural	24	25	47	30	11	10	12	22	4
OCCUPATION									
Self-employed	26	26	39	30	12	9	12	24	4
Employee	22	26	47	33	9	10	12	24	2
Manual workers	20	38	42	22	12	10	10	23	4
Not working	23	26	42	31	10	11	12	24	4
MAIN HOLIDAY - 2009									
Domestic	22	29	42	26	13	10	11	25	3
Elsewhere in the EU	23	26	46	35	8	10	12	23	3
Outside the EU	25	23	45	36	6	10	13	25	3

3.2 Ecological concerns

As shown, ecological concerns or considerations did not have a major impact on most interviewed EU citizens' holiday plans. Still, allegedly, such considerations did influence the decisions of about a third of those interviewed (31% of all respondents, or 35% if those who said they never go on holiday are ignored), and an additional 11% said that such considerations would play a role in the future.

Taking the environment into consideration when making decisions about holidays

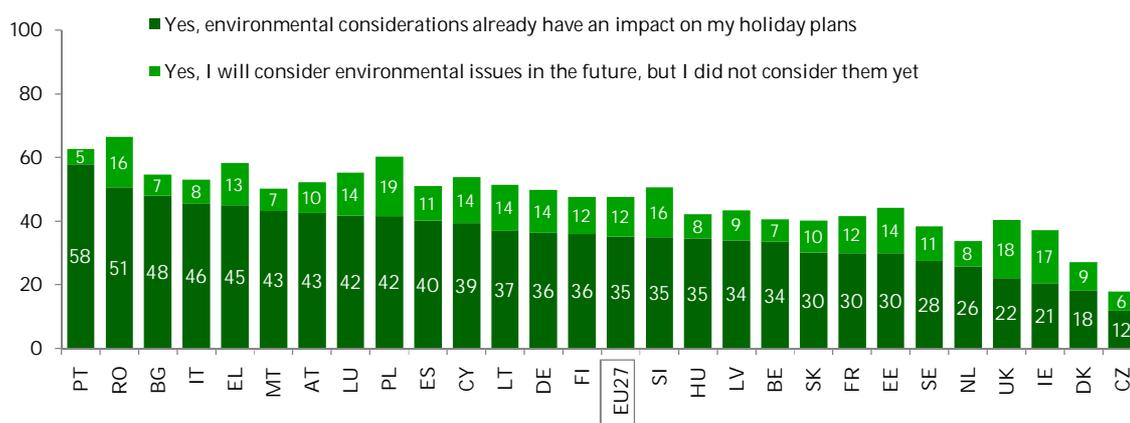


Q11. Do you consider environmental issues when making decisions about your holidays, such as the facilities provided at the destination or offered by service providers (e.g. Accommodation with an eco-label, responsible travel, minimising impact on the local environment)?

Base: all respondents, % EU27

According to respondents' reports, ecological considerations were most often taken into account in Portugal (58%), Romania (51%) and Bulgaria (48%). The least likely to have such concerns were Czech (12%), Danish (18%), Irish (21%) and British (22%) holidaymakers.

Environmental considerations when deciding on holidays



Q11. Do you consider environmental issues when making decisions about your holidays, such as the facilities provided at the destination or offered by service providers (e.g. Accommodation with an eco-label, responsible travel, minimising impact on the local environment)?

Base: those who did not indicate they never travel, % by country

Polish (19%), British (18%), Irish (17%), Slovene and Romanian (16%) respondents most often said that they would be paying attention to ecological concerns in the future.

Looking at the various socio-demographic groups on the same basis (e.g. excluding those who never go on holiday), only minor variations were detected. Environmental concerns appeared to be somewhat related to age (older respondents were more likely to pay attention to this aspect when they

planned their vacation: 55+: 37%, 25 to 39: 33%). In addition, the most educated were rather more likely to pay attention to such factors (38% vs. 34% of those with an average level of education). Environmental concerns had the most impact in relation to domestic travel: 40% of those who spent their holiday in their own country indicated that such criteria played a role in choosing a location. This compared to 31% of those who travelled elsewhere in the EU and 33% who took a vacation in a non-EU country.

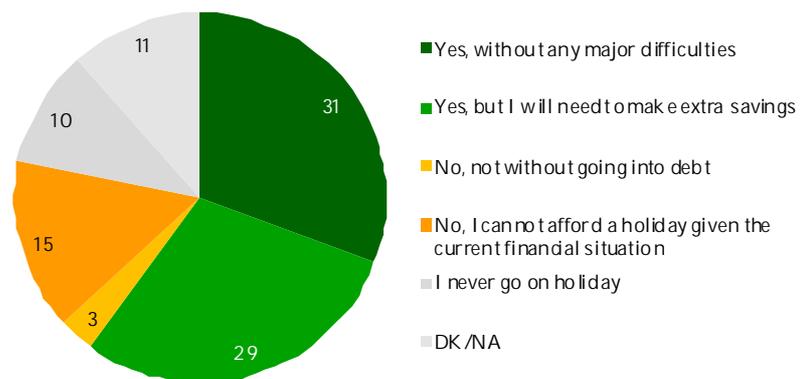
4. Outlook for 2010

4.1 Affordability of holidays in 2010

Looking ahead, the outlook for 2010: 60% of respondents felt that they would be able to take a vacation away from home next year. Some of those who were currently uncertain or did not say if they would be able to take some kind of holiday (11%) may eventually turn out to go on vacation in 2010.

Focusing specifically on the proportion of likely holidaymakers, the youngest EU citizens (72%), the most educated (74%) and employees (74%) were the most confident that they would be able to afford a vacation next year. On the other hand, only about half of those aged over 54 (51%), manual workers (52%) and those not working (52%) anticipated that they would be able to afford some kind of vacation next year. (Annex Table 14b.)

Having the necessary financial resources for holidays in 2010

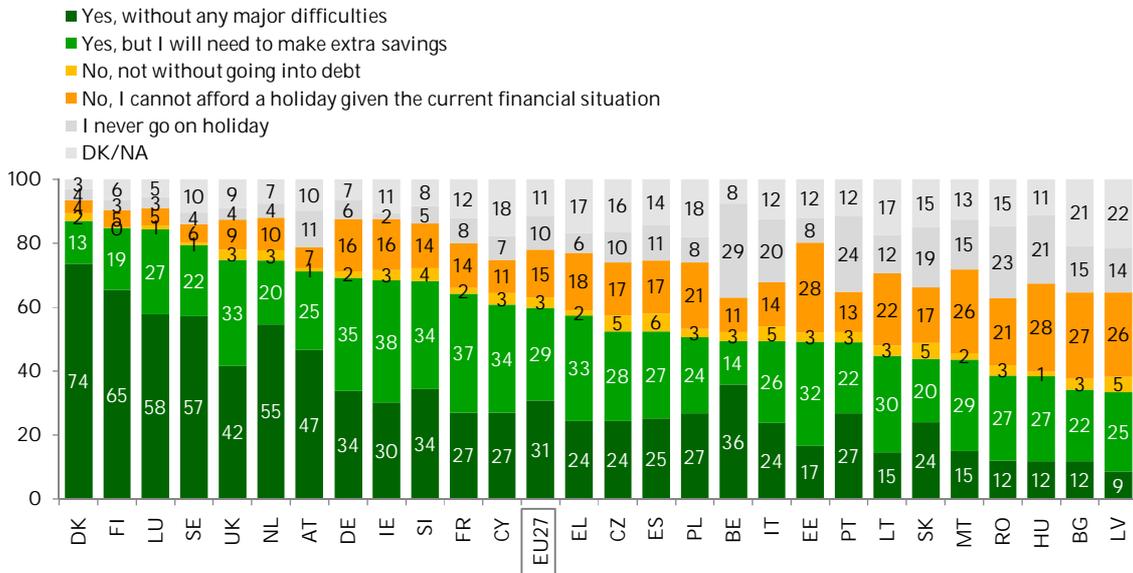


Q12. Will you have the necessary financial resources to be able to afford some type of holiday in 2010?
Base: all respondents, % EU27

There were only five Member States where a clear majority of respondents were confident that they could afford to take a holiday in 2010: Denmark (74%), Finland (65%), Luxembourg (58%), Sweden (57%) and the Netherlands (55%). Almost half (47%) of Austrian respondents also felt that they would have no problems in funding their 2010 vacation and 42% in the UK also felt that way. In other Member States, a third or less of those interviewed said they would have no financial problems in regard to their holidays. Latvia (9%), Bulgaria, Hungary, Romania (all 12%), Malta and Lithuania (both 15%) had the lowest share of optimistic replies.

Hungary and Estonia (both 28%), Bulgaria (27%), Latvia and Malta (26%) had the most respondents who felt they would not be taking a holiday in 2010 for financial reasons. Throughout the EU, very few people indicated that they would take a loan to finance their holiday next year (1% to 6%).

Having the necessary financial resources for holidays in 2010



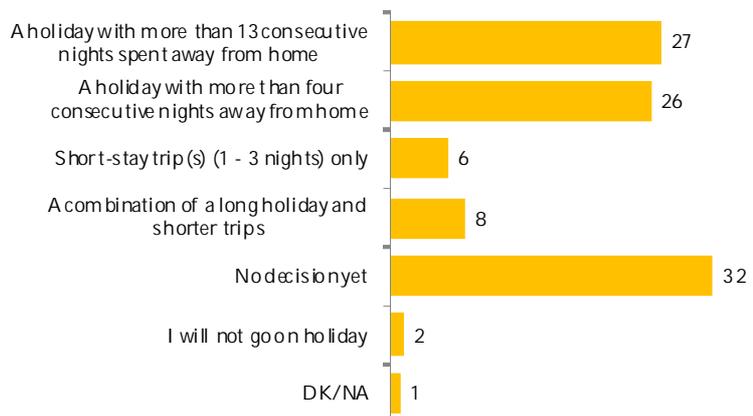
Q12. Will you have the necessary financial resources to be able to afford some type of holiday in 2010? Base: all respondents, % by country

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 afford a holiday in 2010; at least a quarter of those interviewed in 19 Member States felt that this was the case – primarily in Ireland (38%), France (37%), Germany (35%), Slovenia and Cyprus (both 34%).

4.2 Type of holiday planned for 2010

Respondents who indicated that they could afford a holiday in 2010 were asked about the type of holiday they were planning to take in 2010. A third (32%) had not yet made up their mind. Looking at the rest, this survey found a higher proportion of respondents planning a more substantial holiday in 2010 compared to the plans that *Flash Eurobarometer 258* recorded for 2009: 27% planned to have a long holiday in 2010, a five percentage point increase compared to the original plans that people had for 2009³. Similarly, the proportion of those who were planning a holiday of more than four days but less than two weeks (26%) was also up – by seven percentage points. On the other hand, the proportion of those who only planned short trips for 2010 (6%) was only half that of the 2009 figure.

Holiday plans for 2010



Q13. What kind of holiday are you planning in 2010? Base: who can afford a holiday in 2010, % EU27

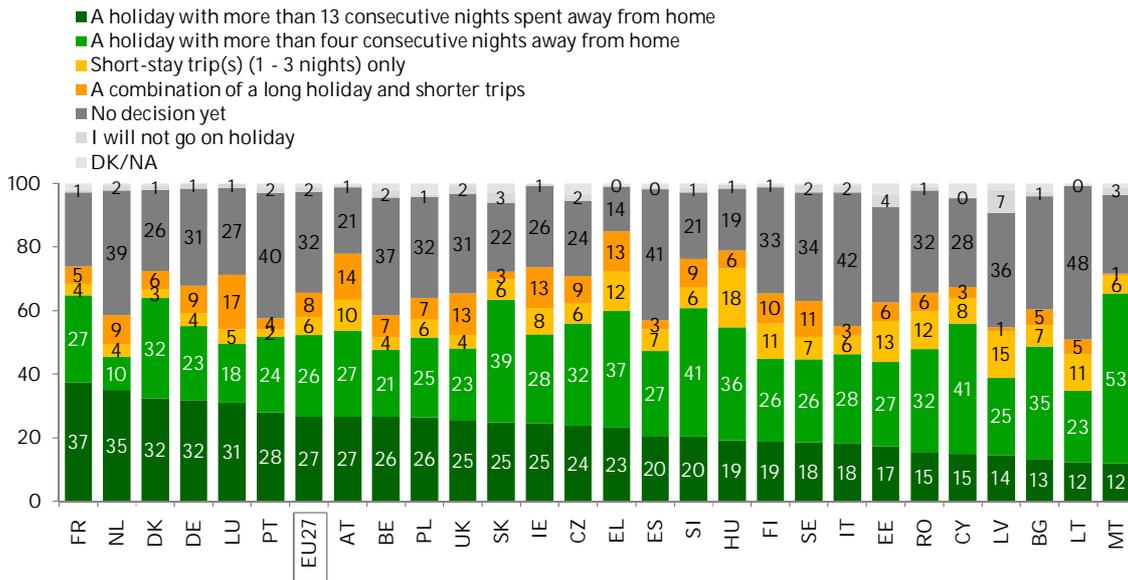
The French were the most confident that they would be taking a long vacation next year (37% expected a holiday of at least two weeks, see the following chart). Such a vacation, however, remained a dream for many people in

³ The 2009 figures were recalculated on a compatible basis, excluding those who indicated that they did not plan to take a trip at all.

Malta and Lithuania, where only 12% expected to take such a long holiday in 2010. Hungarians (18%), Latvians (15%) and Estonians (13%) were the most likely to anticipate that their vacation would be a (combination of) short trip(s), lasting less than four consecutive nights.

Respondents from Luxembourg (17%), Austria (14%), Ireland and the UK (both 13%) were the ones most likely to be anticipating that they would be able to mix such a long holiday with shorter trips.

Holiday plans for 2010



Q13. What kind of holiday are you planning in 2010?
Base: who can afford a holiday in 2010, % by country

Annex Table 15b. shows a clear correlation between affluence (and its proxy indicators among the socio-demographic parameters such as a high level of education, a metropolitan residence, and being either self-employed or an employee) and the tendency to take longer vacations or multiple vacations, including some shorter trips.

As this question was only presented to those who assumed that they would be able to afford a holiday, there was a similar correlation with age: the older the respondent, the greater the likelihood they would opt for longer holidays. (Of course, the proportion of non-travellers is significantly higher in the oldest age segment, as shown in section 4.1)

Flash EB Series #281

Survey on the attitudes
of Europeans
towards tourism

Annex Tables and Survey Details

THE GALLUP ORGANIZATION

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Table 1a. Holiday trips and short private trips in 2009 – by country

QUESTION: Q1. Did you go on a holiday or take a short private trip in 2009 where you were away from home for a minimum of one night? This excludes business travel.

	Total N	% Yes, I went on a holiday or took a short trip in 2009, and I am not planning any other holidays or short trips in 2009	% Yes, I went on a holiday or took a short trip in 2009, and I still plan other holidays or short trips in 2009	% No, but I still plan to go on a holiday or take a short trip in 2009	% No, I will not go on any holiday in 2009	% DK/NA
 EU27	23606	35	21.8	5.5	37.1	0.6
COUNTRY						
 Belgium	1000	40.7	10.6	4.5	41.3	2.8
 Bulgaria	1005	25.5	9.3	3.6	61	0.7
 Czech Rep.	1003	43.6	11.5	3.7	40.7	0.5
 Denmark	1001	40.9	42	3.1	13.8	0.2
 Germany	1009	35	28.6	6.6	29.9	0
 Estonia	512	42.4	12.6	6.1	37	2
 Greece	1001	39.7	21.6	5.4	32.7	0.5
 Spain	1005	33.7	14.7	6	45.4	0.2
 France	1000	38	24.4	4.2	33.3	0
 Ireland	1000	39.7	36.9	4.4	18.8	0.2
 Italy	1005	35.8	8.3	4.4	49.8	1.8
 Cyprus	500	52.5	14.5	6	26.7	0.3
 Latvia	500	28	10.9	4.9	55.6	0.7
 Lithuania	500	32.3	15.8	5.2	44.5	2.2
 Luxembourg	511	36.9	41.1	4.8	17.2	0
 Hungary	1007	29	12.2	5	53.3	0.6
 Malta	505	24.2	8.5	4.5	60.8	2
 Netherlands	1001	50.3	23.3	5.9	19.7	0.8
 Austria	1000	36.7	31.1	6.5	25.3	0.5
 Poland	1013	30.4	19.2	5.8	44.2	0.4
 Portugal	1001	34.2	9.9	4.4	51.1	0.4
 Romania	1010	24.2	16	4.5	54	1.3
 Slovenia	501	35.8	34.5	4.8	24.8	0.1
 Slovakia	1014	29.5	8.4	3.7	57.9	0.5
 Finland	1001	35.6	48.8	3.1	11.7	0.8
 Sweden	1001	46.1	34.9	3.7	14.9	0.4
 United Kingdom	1000	31.3	34.9	8	25.1	0.7

Table 1b. Holiday trips and short private trips in 2009 – by segments

QUESTION: Q1. Did you go on a holiday or take a short private trip in 2009 where you were away from home for a minimum of one night? This excludes business travel.

	Total N	% Yes, I went on a holiday or took a short trip in 2009, and I am not planning any other holidays or short trips in 2009	% Yes, I went on a holiday or took a short trip in 2009, and I still plan other holidays or short trips in 2009	% No, but I still plan to go on a holiday or take a short trip in 2009	% No, I will not go on any holiday in 2009	% DK/NA
EU27	23606	35	21.8	5.5	37.1	0.6
 SEX						
Male	11405	36.2	22.7	6.3	34.4	0.4
Female	12201	33.8	21.1	4.7	39.6	0.8
 AGE						
15 - 24	3426	42.6	25.8	6.3	24.6	0.7
25 - 39	5842	39.7	22.3	5.8	31.5	0.7
40 - 54	6019	39.3	21.8	4.6	33.8	0.5
55 +	8075	25.6	19.9	5.7	48.2	0.6
 EDUCATION (end of)						
Until 15 years of age	3895	19.5	11.4	5.2	63.1	0.9
16 - 20	9964	35.4	19.9	5.8	38.4	0.5
20 +	6760	41.3	30.5	5.8	22	0.5
Still in education	2331	45.7	25	4.6	24	0.7
 URBANISATION						
Metropolitan	4207	38.2	28.8	4.7	27.8	0.5
Urban	10013	35.1	21.4	5.8	37.1	0.5
Rural	9217	33.7	19.1	5.5	40.9	0.7
 OCCUPATION						
Self-employed	2095	36.1	26.7	7.1	29.4	0.6
Employee	7514	42.4	28	5.7	23.4	0.5
Manual worker	2010	36.3	14.9	6.5	41.9	0.4
Not working	11838	30	18.3	5	46.1	0.7
 MAIN HOLIDAY IN 2009						
Domestic	7036	60.8	31.2	8.1	0	0
Elsewhere in EU	4676	54.6	37.9	7.5	0	0
Outside the EU	2792	49.6	40.6	9.8	0	0

Table 2a. Cutting on the budget spent on holiday in 2009 – by country

QUESTION: Q2. Under the current economic conditions, did you have to cut back in 2009 on the budget that you normally spend on holidays?

	Total N	% Yes, I had to cut back	% No, but I decided to cut back as a precaution	% No	% I never go on holiday	% DK/NA
 EU27	23606	34.1	5.4	43.7	13.8	3
COUNTRY						
 Belgium	1000	19.6	4.1	42	30.3	4.1
 Bulgaria	1005	32.9	4.7	18.9	28.4	15.2
 Czech Rep.	1003	30.7	7.9	49	10.4	2.1
 Denmark	1001	14.8	3.8	78	3.2	0.1
 Germany	1009	29.6	6.6	57	5.6	1.2
 Estonia	512	41.1	11.1	30.3	15.2	2.2
 Greece	1001	45	5.2	38.5	10.4	0.8
 Spain	1005	41.5	5.9	35.7	15.8	1.1
 France	1000	40.2	4.9	43.3	10.9	0.7
 Ireland	1000	59.7	4.5	32.7	2.9	0.2
 Italy	1005	31.4	3.7	31.3	30.6	2.9
 Cyprus	500	41.4	3.2	46.6	7.4	1.5
 Latvia	500	51.5	4	17.3	23.6	3.5
 Lithuania	500	53.4	7.8	18.9	14.7	5.2
 Luxembourg	511	17.5	8.8	70.1	3.1	0.6
 Hungary	1007	40.7	5.6	20.5	30.7	2.4
 Malta	505	48.8	3.1	25.9	18.6	3.5
 Netherlands	1001	21.3	5.2	67.9	2.8	2.8
 Austria	1000	19.1	7.5	60.6	11.3	1.4
 Poland	1013	28.4	5.8	44	7.9	13.9
 Portugal	1001	26.6	7	34.8	28.3	3.2
 Romania	1010	39.4	6	19.1	30.7	4.8
 Slovenia	501	30.7	8.1	52.4	7	1.8
 Slovakia	1014	24	6.5	47.6	18.8	3.1
 Finland	1001	23	4.5	66.7	5.4	0.4
 Sweden	1001	17.5	3.9	73.6	4.5	0.5
 United Kingdom	1000	42	4.7	46.2	5.1	2

Table 2b. Cutting on the budget spent on holiday in 2009 – by segments

QUESTION: Q2. Under the current economic conditions, did you have to cut back in 2009 on the budget that you normally spend on holidays?

	Total N	% Yes, I had to cut back	% No, but I decided to cut back as a precaution	% No	% I never go on holiday	% DK/NA
EU27	23606	34.1	5.4	43.7	13.8	3
 SEX						
Male	11405	32.9	5.6	46.7	12.1	2.8
Female	12201	35.2	5.3	40.9	15.4	3.2
 AGE						
15 - 24	3426	32.4	7.8	51.2	5.1	3.5
25 - 39	5842	41.9	5.9	41.4	8.1	2.7
40 - 54	6019	38.7	5.5	42.5	10.7	2.6
55 +	8075	25.9	4.1	43.2	23.5	3.3
 EDUCATION (end of)						
Until 15 years of age	3895	26.3	3.3	32.7	34	3.8
16 - 20	9964	39.1	5	40.7	11.7	3.5
20 +	6760	33.9	6.4	52.8	5.4	1.4
Still in education	2331	29.4	9.1	51.8	6.8	2.8
 URBANISATION						
Metropolitan	4207	35.2	4.9	49.5	7.6	2.7
Urban	10013	35.1	5.4	42.6	14	3
Rural	9217	32.5	5.6	42.4	16.4	3
 OCCUPATION						
Self-employed	2095	35.2	4.3	50.3	8.6	1.5
Employee	7514	37.3	6.5	49.3	5	1.9
Manual worker	2010	46.9	6.4	31.9	12.4	2.5
Not working	11838	29.6	4.7	41.1	20.5	4
 MAIN HOLIDAY IN 2009						
Domestic	7036	45.2	7.3	46.3	0.5	0.8
Elsewhere in EU	4676	33.6	7.3	58.2	0.1	0.8
Outside the EU	2792	28.4	7.1	63.6	0.1	0.8

Table 3a. Way of cutting back on holiday budget in 2009 – first mentions – by country

QUESTION: Q3a. How did you - or will you - cut back on your holiday budget in 2009? What was - or will be - the most important change that you made - or will make?

Base: those who went on holiday and/or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution

	Total N	% Fewer holidays or short trips	% Reduced length of holiday or short trips	% Cheaper means of transport	% Cheaper accommodation	% A holiday closer to home	% Changes in the period of travel (not peak season)	% Other	% DK/NA
 EU27	6677	13.3	25.5	6.4	19.3	16.4	9.4	7.9	1.8
COUNTRY									
 Belgium	184	12	17.9	7.7	16	9.4	12.2	16.4	8.2
 Bulgaria	245	9	33.3	7.9	26	8.2	5.6	5.8	4.2
 Czech Rep.	274	14.4	21.8	6.3	27.5	20	4	3.8	2.1
 Denmark	151	12.7	16.2	11.3	20.4	14.6	6.4	17	1.4
 Germany	258	11.8	29.1	6.9	17.1	14.6	13.8	5.1	1.6
 Estonia	202	14.8	19.3	11.7	17.4	18.5	7.7	6.9	3.7
 Greece	384	13.9	31.8	4.8	19.8	14.1	5	8.9	1.7
 Spain	312	18.2	28.3	4.1	24.5	12.8	5.8	5.6	0.6
 France	325	8.4	32.8	4.7	19.3	10.4	6.7	16.8	0.9
 Ireland	525	10.9	21.4	7.4	18	24	10.1	6.6	1.5
 Italy	256	13.6	27.1	3.2	19.3	13.3	14.2	5.5	3.7
 Cyprus	175	19.7	19.9	8	18.1	20.9	6.4	6.7	0.3
 Latvia	173	18.3	19.7	16.9	18.1	14.3	2.5	5	5.2
 Lithuania	202	15.1	29.2	3	17	23.6	5	4.5	2.6
 Luxembourg	112	14	15.8	10.3	20.5	21.7	10.4	6.8	0.5
 Hungary	330	20.9	17.9	10.7	22.3	12.9	8.5	6.5	0.4
 Malta	107	9.5	17.7	5.4	17.8	17.6	4.1	23.5	4.4
 Netherlands	209	18.5	12.5	5.9	16.6	24.4	9.2	9.2	3.7
 Austria	210	11.8	28.5	2.2	21.6	14	10.4	7.2	4.4
 Poland	232	9.7	24.6	12.6	13.5	17.3	9.5	11.3	1.5
 Portugal	237	15.9	17.2	2.5	22.1	23.2	11.3	7.8	0
 Romania	320	14.1	25.5	10.2	19.8	18.4	7.8	3.7	0.5
 Slovenia	140	11.6	32.4	2.2	21.1	16.2	10.5	4.5	1.4
 Slovakia	170	12.2	15.5	6.1	23.7	20.9	6.7	13.1	1.6
 Finland	249	15.4	26.2	7.3	12.8	16.6	7.7	11	3.1
 Sweden	185	13.2	24.7	9.1	12.7	15.2	5.6	12.6	7
 United Kingdom	354	14.9	16.7	7.2	19.2	26.3	9.6	4.9	1.1

Table 3b. Way of cutting back on holiday budget in 2009 – first mentions – by segments

QUESTION: Q3a. How did you - or will you - cut back on your holiday budget in 2009? What was - or will be - the most important change that you made - or will make?

Base: those who went on holiday and/or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution

	Total N	% Fewer holidays or short trips	% Reduced length of holiday or short trips	% Cheaper means of transport	% Cheaper accommodation	% A holiday closer to home	% Changes in the period of travel (not peak season)	% Other	% DK/NA
EU27	6677	13.3	25.5	6.4	19.3	16.4	9.4	7.9	1.8
 SEX									
Male	3206	13.4	27.3	6.2	19.5	15.9	8.5	7.2	2.1
Female	3471	13.2	23.8	6.7	19.1	16.9	10.3	8.6	1.5
 AGE									
15 - 24	1099	10.9	21	11.5	22	17.7	9.2	5.3	2.5
25 - 39	2026	13.2	23.9	5.9	19.9	18.3	10.3	7.5	1.1
40 - 54	1906	14.6	27.7	5.3	20.6	14.8	8.8	7.2	0.9
55 +	1603	13.7	27.7	5	15.4	15.3	9.2	11	2.7
 EDUCATION (end of)									
Until 15 years of age	660	17.2	19.3	5.3	18	16.7	9.2	11.8	2.5
16 - 20	3068	12.1	28.2	5.7	17.1	18	8.9	8.1	1.8
20 +	2128	14.4	25.7	5.9	21.5	14.1	10	7.4	1
Still in education	736	11.4	18.8	11.5	23.3	16.8	10.6	5.1	2.6
 URBANISATION									
Metropolitan	1306	13.2	24.4	6.4	19.8	15.3	10.4	9.5	0.9
Urban	2899	13.4	25.2	6.5	19.7	16.9	8.2	7.6	2.4
Rural	2442	13.3	26.2	6.4	18.4	16.5	10.3	7.3	1.5
 OCCUPATION									
Self-employed	630	15.3	27.8	5.5	19	16.1	9.3	5.7	1.3
Employee	2532	13	26.3	4.8	21.1	16.1	9.9	7.6	1.3
Manual worker	711	13.1	28.3	8.6	16.9	18.3	5.9	8.2	0.6
Not working	2767	13.3	23.6	7.4	18.6	16	9.9	8.6	2.6
 MAIN HOLIDAY IN 2009									
Domestic	3693	12.8	27.2	4.5	17.8	21.3	6.9	7.8	1.5
Elsewhere in EU	1912	13.7	23.4	9.1	22.5	11.6	10.4	7.3	2.1
Outside the EU	990	14	23.7	8.2	17.8	8.2	16.7	9.8	1.7

Table 4a. Way of cutting back on holiday budget in 2009 – second mentions – by country

QUESTION: Q3b. And what was - or will be - the second most important change?*Base: those who went on holiday and/or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution*

	Total N	% Fewer holidays or short trips	% Reduced length of holiday or short trips	% Cheaper means of transport	% Cheaper accommodation	% A holiday closer to home	% Changes in the period of travel (not peak season)	% Other	% None	% DK/NA
 EU27	6559	10.4	15.2	11.4	20.8	12.4	7.4	5.9	13.8	2.6
COUNTRY										
 Belgium	169	7.7	5	16.3	11.5	8.6	10.2	10	25.5	5.2
 Bulgaria	235	12.9	18	14.2	17.8	13.1	7.2	5.9	2.5	8.5
 Czech Rep.	268	5.2	20.4	17	26.1	12.2	8.7	3.2	3.6	3.5
 Denmark	149	6.7	12.8	14.7	11.4	11.4	5.7	11.2	24	2.1
 Germany	254	8.7	18.7	12.3	22	16.2	9.6	3.9	7.2	1.3
 Estonia	195	8	12.6	21.5	20.1	18.9	3.5	7.3	0.3	7.7
 Greece	378	9.4	13.5	13.7	18.6	11.3	7.7	6.4	18.2	1.2
 Spain	311	12.4	12.5	8.9	25.9	15.2	5.8	5.7	12.1	1.5
 France	322	4.3	11.5	8.8	16.6	7.2	3.4	12.1	34.8	1.3
 Ireland	517	13.1	11.3	16.8	27.4	10.3	7.6	6.2	6.2	1
 Italy	246	18.8	16.3	6	14.5	12.3	5.7	4.4	21.3	0.6
 Cyprus	174	14.4	12.5	8.7	25.4	10.3	9.8	8.5	6.8	3.6
 Latvia	164	8.1	12.6	18.3	25.7	16.8	4.7	5.4	1.4	7
 Lithuania	196	5.9	16.3	12.4	24.5	17.1	9.3	3.8	0.7	10
 Luxembourg	111	10.2	14	19	12.1	14	11	7.7	10.5	1.5
 Hungary	329	10.6	10.3	7.5	28.6	14.9	12.6	5.8	7.7	2.1
 Malta	102	4.9	8.8	14.8	22.3	9.6	4.7	5.4	17.3	12.3
 Netherlands	202	12.9	12.6	12.7	17.2	8.8	9.6	4.6	20	1.6
 Austria	201	4.9	11.1	14.2	20.6	23.4	4.2	6.6	14.5	0.4
 Poland	229	7.5	18	13.6	24.5	10.8	7.5	3.9	9.7	4.3
 Portugal	237	13.2	14.6	11	22.5	11.5	7.4	8.2	10.3	1.4
 Romania	318	10.7	18.3	12	23.6	11.6	9.2	3.5	8.4	2.7
 Slovenia	138	8.4	19.7	4.8	18.3	15.6	5.2	9.7	16.5	1.6
 Slovakia	167	3.3	17	14.2	20.5	14.2	8.5	9.6	7.2	5.4
 Finland	241	16.8	10.5	10.2	18	14.6	6.8	4.3	7.9	10.9
 Sweden	172	17.7	14.6	17	13.6	11.2	5	5.5	12.6	2.8
 United Kingdom	351	12.1	16.9	13.8	21.8	12.1	9.9	4.5	3.4	5.5

Table 4b. Way of cutting back on holiday budget in 2009 – second mentions – by segments

QUESTION: Q3b. And what was - or will be - the second most important change?

Base: those who went on holiday and/or still plan to go on a holiday in 2009 and had to cut back on the budget or decided to cut back as a precaution

	Total N	% Fewer holidays or short trips	% Reduced length of holiday or short trips	% Cheaper means of transport	% Cheaper accommodation	% A holiday closer to home	% Changes in the period of travel (not peak season)	% Other	% None	% DK/NA
EU27	6559	10.4	15.2	11.4	20.8	12.4	7.4	5.9	13.8	2.6
 SEX										
Male	3139	10.4	15	11.4	21.9	12.1	8.3	5.3	13.4	2.3
Female	3420	10.5	15.5	11.3	19.7	12.7	6.7	6.5	14.2	2.9
 AGE										
15 - 24	1072	10.5	15.4	16.7	24.1	10.6	9.3	3.4	6.6	3.5
25 - 39	2004	9.7	14.3	11.6	22.5	13.5	7.5	5.8	12.7	2.4
40 - 54	1889	10.9	16.9	9.5	21.2	13.4	6.1	6.2	13.7	2
55 +	1560	10.7	14.3	9.7	15.8	11.2	7.9	7.4	20.2	2.8
 EDUCATION (end of)										
Until 15 years of age	643	10	16	9	18	16.1	6.1	3.5	17.9	3.5
16 - 20	3012	9.9	15.1	11.4	21.9	13.2	6.6	5.9	13.2	2.8
20 +	2107	12	14.6	9.8	19.9	11.2	9.1	7.7	14	1.7
Still in education	717	8.9	17.4	18.3	22.4	8.9	7.6	3.3	10	3.2
 URBANISATION										
Metropolitan	1294	9.9	13.7	11.9	19.6	12.6	7.5	6.9	16	2
Urban	2830	11.5	15.3	11.7	20.5	11.2	7.7	5.6	13.5	3
Rural	2405	9.6	16.2	10.6	21.6	13.8	7	5.8	13.1	2.3
 OCCUPATION										
Self-employed	622	13.4	12	10.1	26.4	9.9	7.5	3.6	15	2.1
Employee	2499	10.2	16.6	10.5	20.4	13.1	7.8	6.6	12.2	2.6
Manual worker	707	9.2	15.6	12.6	23.5	12.2	7.6	5.9	12.1	1.4
Not working	2695	10.4	14.4	12.2	19	12.5	7.2	5.9	15.5	2.9
 MAIN HOLIDAY IN 2009										
Domestic	3637	10.8	16.7	9	22	14.5	5.6	5.6	14.2	1.6
Elsewhere in EU	1872	10.1	14.7	14.2	19.7	10.7	9.6	5.5	12	3.5
Outside the EU	973	8.8	11.3	14.4	18.1	8.3	10.1	8.3	15.8	4.9

Table 5a. Type of leisure activities on which respondents made the most reduction – by country

QUESTION: Q4. If you had to reduce your spending on leisure activities when you were on holiday in 2009, on which kind of leisure activity did you make the most reduction?

Base: those who went on holiday or took a short trip in 2009, and not planning any other holiday or short trips in 2009

	Total N	% Entertainment (movies; theatres)	% Cultural activities	% Restaurants and cafes	% Shopping	% Beauty/Wellness treatments	% Sports and other activities	% Other	% I did not have to reduce spending	% DK/NA
 EU27	8254	5.9	2.9	23.1	17.4	3.8	2.9	3.2	38.1	2.6
COUNTRY										
 Belgium	407	4.4	3.8	22.6	9.5	4.1	1.9	4.6	44.4	4.8
 Bulgaria	256	12.9	5.4	23.1	16.6	2.2	5.4	3.3	23.2	7.9
 Czech Rep.	438	4.7	4.5	19.1	18.7	2.5	2.1	2	37.1	9.2
 Denmark	409	3.5	2.7	8	11.2	4.4	2.2	2.4	63.3	2.3
 Germany	353	4.2	2.8	16.9	17.4	6.6	2.7	3.4	44.2	1.7
 Estonia	217	10.1	5	17.2	25.7	4.7	1.4	6	24.8	5.1
 Greece	398	17.2	3.2	21.3	23.2	4.9	0.3	2	27.5	0.4
 Spain	339	7.3	1	26.2	17.1	1.6	1.9	3.3	40	1.4
 France	380	5.5	4.4	36.4	12.5	1.9	3.2	3.1	31.9	1.1
 Ireland	397	6.9	4	29.1	31.5	5.8	3	1.7	16.5	1.6
 Italy	360	3.1	2.2	26.4	22.7	1.7	3.1	2.8	35	3
 Cyprus	262	10.7	1.3	18.9	37.7	11.4	2.5	3.8	11.9	1.8
 Latvia	140	6.8	6.2	20	26.8	1.8	0.9	7.1	7.8	22.6
 Lithuania	162	15.3	4.1	32.2	19.9	4.4	2.4	4.3	11.6	5.9
 Luxembourg	189	0.9	0.7	17.7	18.3	7.6	1.8	0.5	52	0.4
 Hungary	292	9.8	2.1	24.2	17.8	13.2	1.8	4.6	22.6	4
 Malta	122	6.3	3	28.9	22	4.6	0	4	26.3	4.9
 Netherlands	504	6.7	1.7	19.9	10.8	2.7	2.3	3.1	50.1	2.6
 Austria	367	2.9	2.3	11.8	11.7	8.3	4	3.5	51.3	4.1
 Poland	308	8.1	3.2	13.1	18.5	4.7	2.2	3.8	43	3.3
 Portugal	342	4.6	1.8	26.8	14.7	3	0.9	8	39.8	0.4
 Romania	245	4	5.8	24.4	23.8	3.9	6.2	5.8	21.7	4.3
 Slovenia	179	10.9	3.9	20.4	19.3	16.6	2.9	3.7	19.1	3.3
 Slovakia	299	3.1	4.3	14.5	14.3	1.9	1.2	4.3	51.9	4.5
 Finland	356	7	2.1	16.3	11	3.4	1.4	1.3	53.3	4.3
 Sweden	461	2.8	2.1	8.6	13.3	6.5	1.8	2	58.7	4.2
 United Kingdom	313	7.2	2.4	25.3	19.9	3.1	5.3	1.5	33.5	1.8

Table 5b. Type of leisure activities on which respondents made the most reduction – by segments

QUESTION: Q4. If you had to reduce your spending on leisure activities when you were on holiday in 2009, on which kind of leisure activity did you make the most reduction?

Base: those who went on holiday or took a short trip in 2009, and not planning any other holiday or short trips in 2009

	Total N	% Entertainment (movies; theatres)	% Cultural activities	% Restaurants and cafes	% Shopping	% Beauty/Wellness treatments	% Sports and other activities	% Other	% I did not have to reduce spending	% DK/NA
EU27	8254	5.9	2.9	23.1	17.4	3.8	2.9	3.2	38.1	2.6
 SEX										
Male	4128	6.2	2.5	22	15.4	2.8	3.5	3.4	41	3
Female	4126	5.6	3.3	24.2	19.4	4.9	2.3	2.9	35.2	2.2
 AGE										
15 - 24	1460	7.3	2.8	19.4	16.9	3.8	4.9	1.6	39.9	3.5
25 - 39	2318	5.4	3.7	23.3	20.5	3.3	2.7	3.2	35.9	1.9
40 - 54	2367	5.3	3.1	26.2	18.3	4.2	2.9	3.5	34.6	1.9
55 +	2064	6.1	1.8	22	13.3	4.1	1.7	3.9	43.5	3.7
 EDUCATION (end of)										
Until 15 years of age	758	5.5	1.1	25.4	19.8	4.9	1.7	3.6	35.2	2.7
16 - 20	3532	6.7	2.9	24.5	18.9	3.4	2.9	3.1	35.2	2.2
20 +	2789	4.9	3.4	22.6	14.9	4	2.7	3.3	41.8	2.5
Still in education	1066	6.4	3.2	19.1	17.5	3.8	4.3	2	39.9	3.8
 URBANISATION										
Metropolitan	1608	7.9	3.9	23.5	14.4	2.3	2.3	2.5	39.8	3.3
Urban	3515	5.8	2.8	21.9	19.5	4.3	2.8	3.6	37.5	1.9
Rural	3102	4.9	2.5	24.3	16.5	4.2	3.4	2.9	38.1	3.1
 OCCUPATION										
Self-employed	757	5.8	2.7	23.7	17.6	3.6	2.7	2.9	38.5	2.6
Employee	3185	5.2	3.1	23.6	17.3	4	2.4	2.8	39.7	1.9
Manual worker	731	5.3	3.1	26.8	18.2	4.1	5.6	5.8	29.1	2.1
Not working	3548	6.7	2.8	21.7	17.5	3.8	2.9	3	38.5	3.3
 MAIN HOLIDAY IN 2009										
Domestic	4275	7.4	3.1	25.7	17.5	3.5	2.3	3.1	35.4	2.2
Elsewhere in EU	2552	4	2.4	20.2	18.3	4.1	3.4	3.2	41.2	3.1
Outside the EU	1384	5	3.4	20.2	16.1	4.6	4.2	3.3	40.5	2.8

Table 6a. Preferred month for starting the main holiday – by country

QUESTION: Q5. In which month of 2009 did you - or will you - start your main holiday?*Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009*

	Total N	% January	% February	% March	% April	% May	% June	% July	% August	% September	% October	% November	% December	% DK/NA
 EU27	14707	1.6	1.4	2	3.8	6.5	12	25.6	30.8	7.7	3.5	1.3	1.6	2.1
COUNTRY														
 Belgium	559	1.9	1.9	1.5	3.4	5.2	10.4	36	22.7	5.9	2.5	3.2	1.1	4.2
 Bulgaria	386	0.8	0.2	0.1	1.5	4.1	6.9	32.3	38.9	6.6	2.8	0.4	1.2	4.3
 Czech Rep.	590	1.4	1.6	0.6	2.4	4.8	19.4	34.5	26.2	5	0.8	1.1	0.5	1.8
 Denmark	861	1.5	4.4	2.7	2.9	4.3	18.8	43.5	12.5	4.4	2.5	0.7	0.6	1.2
 Germany	708	1.7	1.6	3.1	6.1	11.7	13.1	19.1	23.2	9.1	5.5	1.6	2	2.1
 Estonia	312	0.9	3.3	4.8	2	3.5	22.1	33.1	17.3	1.7	3.8	1.5	1.9	4.2
 Greece	668	1	0.3	0.6	0.4	1.4	8.1	32	45.8	4.9	2	0.3	2	1.1
 Spain	547	1.5	1.2	1.7	1.6	2.9	6.1	22.6	43.4	11.1	3.5	1.8	0.7	1.8
 France	667	2.6	0.7	1.6	3.5	6.8	10.4	25.1	38.7	5.4	1.3	1.2	1.9	0.7
 Ireland	810	2.6	2	2.9	5.6	9.4	15.4	25.8	19.1	7.8	6.1	2.1	0.8	0.2
 Italy	486	0.4	1.2	0.9	1.3	2.3	10.6	21.5	49.3	7	1.1	0.8	1.2	2.6
 Cyprus	365	0.5	1.5	0.6	2	1.8	9.8	23.4	48.6	7.2	2.6	0	1.2	0.7
 Latvia	219	2.2	1.9	4	3	8.3	17.9	23.6	15.9	6.3	3.2	2.6	0.6	10.5
 Lithuania	267	0.4	0.7	0.6	2.9	6.4	10.6	36.9	23.7	4.9	4.8	1.3	1.5	5.3
 Luxembourg	423	1.5	4.4	2.8	3.9	6.4	9.3	23.7	34.5	6.6	1.9	1.7	2.1	1.2
 Hungary	465	1	0.7	0.3	2.5	3.9	13.9	27.6	36.5	6.7	3.5	0.8	0.4	2.2
 Malta	188	5.3	3.9	3.3	5.1	3.3	11.3	23.4	26.8	8	0.7	2.8	1.7	4.3
 Netherlands	796	1.8	2.8	1.9	3.1	6.6	11.9	36	21.1	5.4	2	0.8	2.1	4.4
 Austria	743	0.2	3.6	2.9	3.4	10.2	12.1	24.7	26.9	8.7	2.6	1.5	1.5	1.6
 Poland	561	0.7	1	0.8	1.4	4.3	11	33.4	31.6	8.8	3.5	0.3	1.2	2
 Portugal	486	1	1.6	1.2	1.7	2.7	8.5	19.1	48.9	8.4	1.6	1.2	2.2	1.8
 Romania	452	0.2	0.2	1.2	1.8	5.6	12.2	31	30.9	7.5	1.7	1.8	2.5	3.4
 Slovenia	376	0.8	0.7	0.4	1.6	4.8	9.7	44.6	23.6	8.2	3.3	0.2	0.5	1.5
 Slovakia	422	0.9	0.8	0.8	1.8	1.9	11.8	38.8	32.3	4.7	1.3	1.1	1.3	2.5
 Finland	875	2.6	3.9	4.3	4.2	6.6	19.5	32	11.3	3.3	2.4	1.3	1.4	7.3
 Sweden	848	2.9	2.1	2	2.2	6.1	20.7	45	8.5	3.5	1.5	0.7	0.9	4
 United Kingdom	742	2.4	1	3.1	7.7	7.3	14	20	22.7	9.8	6.6	2.2	2.2	1

Table 6b. Preferred month for starting the main holiday – by segments

QUESTION: Q5. In which month of 2009 did you - or will you - start your main holiday?*Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009*

	Total N	% January	% February	% March	% April	% May	% June	% July	% August	% September	% October	% November	% December	% DK/NA
EU27	14707	1.6	1.4	2	3.8	6.5	12	25.6	30.8	7.7	3.5	1.3	1.6	2.1
 SEX														
Male	7436	1.5	1.2	2.1	3.8	6.5	12.1	25.4	30	8.2	3.4	1.5	1.9	2.3
Female	7271	1.8	1.5	1.9	3.9	6.5	11.9	25.8	31.6	7.2	3.5	1.2	1.3	1.8
 AGE														
15 - 24	2559	1.8	1.4	1.2	3.9	3.8	12.7	30.3	33.3	3.9	2.7	1	2.5	1.6
25 - 39	3962	1.3	1.6	2.6	3.4	5.2	10.6	25.9	34.9	7.6	2.7	1.5	1.5	1.4
40 - 54	3953	1	1.3	2.1	2.7	5.3	10.3	28	34.1	6.4	3.9	1.2	1.9	1.8
55 +	4133	2.5	1.2	1.8	5.2	10.6	14.6	20.1	22.5	11.6	4.3	1.5	1	3.2
 EDUCATION (end of)														
Until 15 years of age	1403	2.1	0.5	1	4.2	7.2	12.4	16.3	31.6	13.7	4.5	1.6	1.6	3.3
16 - 20	6087	1.8	1.4	2.3	4.3	7	12.7	23.5	30.1	8	3.3	1.5	2	2
20 +	5237	1.3	1.6	2.2	2.6	6.9	11.2	27	31.8	7.2	3.8	1.3	1.2	1.8
Still in education	1756	1.6	1.4	1.4	5.3	2.6	11.3	35.8	31.4	3.5	2.3	0.7	1.2	1.6
 URBANISATION														
Metropolitan	3017	2	1.3	3	4.1	6.8	12	26.7	31.2	6.2	2.7	0.6	1.7	1.8
Urban	6244	1.3	1.5	1.3	3.2	5.5	11.7	27.5	31.4	7.6	3.9	1.6	1.6	2
Rural	5378	1.8	1.3	2.3	4.4	7.5	12.3	22.9	29.9	8.7	3.5	1.5	1.6	2.3
 OCCUPATION														
Self-employed	1466	1.4	1.7	2.8	4.9	4.9	9.3	26.1	30.7	8.6	4.4	0.9	1.8	2.6
Employee	5716	1.2	1.6	2.4	2.8	5.9	11	27.1	32.6	7.5	3.3	1.4	1.8	1.2
Manual worker	1161	1	1	1.5	3.4	6	10.1	25.1	36.6	6.3	4.3	1.3	2.1	1.4
Not working	6297	2.1	1.1	1.5	4.5	7.5	13.9	24.1	28.2	8.1	3.3	1.4	1.4	2.8
 MAIN HOLIDAY IN 2009														
Domestic	7036	0.7	0.7	0.9	2	4.2	10.9	27.6	39.3	7.6	2.4	0.9	0.9	1.7
Elsewhere in EU	4676	1.8	1.5	2.4	4.8	8.2	13.3	26.3	26.1	7.5	3.7	1	1.5	1.8
Outside the EU	2792	3.6	2.7	4.2	6.8	9.7	13.5	20.6	18.9	8.4	4.8	2.4	3	1.2

Table 7a. Destination of respondents' main holiday in 2009 – by country

QUESTION: Q6. Where did you - or will you - travel for your main holiday in 2009? If more than one place, where did you - or you will - stay most of the time?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

	Total N	% Domestic	% Elsewhere in EU	% Outside the EU	% DK/NA
 EU27	14707	47.8	28.7	19.0	4.5
COUNTRY					
 Belgium	559	13.8	64.9	20.0	1.3
 Bulgaria	386	66.1	11.7	19.2	3.0
 Czech Rep.	590	30.9	47.4	18.3	3.4
 Denmark	861	29.5	48.0	21.7	0.8
 Germany	708	36.6	37.3	23.5	2.6
 Estonia	312	35.1	39.7	23.5	1.6
 Greece	668	86.7	6.0	7.0	0.3
 Spain	547	69.3	16.7	12.0	2.0
 France	667	65.3	16.6	16.6	1.5
 Ireland	810	20.9	57.1	20.8	1.2
 Italy	486	69.5	15.8	12.7	1.9
 Cyprus	365	51.2	40.1	7.5	1.3
 Latvia	219	29.1	39.9	25.9	5.2
 Lithuania	267	46.9	29.4	20.0	3.7
 Luxembourg	423	1.1	70.8	23.6	4.5
 Hungary	465	61.1	24.0	11.0	3.9
 Malta	188	10.5	73.8	10.3	5.4
 Netherlands	796	17.8	55.1	21.7	5.3
 Austria	743	22.7	40.5	27.7	9.1
 Poland	561	61.2	19.8	11.7	7.4
 Portugal	486	67.6	14.1	10.4	7.8
 Romania	452	67.8	22.8	6.2	3.2
 Slovenia	376	18.9	13.8	58.2	9.2
 Slovakia	422	28.2	42.1	26.1	3.6
 Finland	875	50.7	35.0	11.8	2.5
 Sweden	848	55.1	25.6	18.0	1.3
 United Kingdom	742	22.6	34.2	29.9	13.3

Table 7b. Destination of respondents' main holiday in 2009 – by segments

QUESTION: Q6b. Where did you - or will you - travel for your main holiday in 2009? If more than one place, where did you - or you will - stay most of the time?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

	Total N	% Domestic	% Elsewhere in EU	% Outside the EU	% DK/NA
EU27	14707	47.8	28.7	19.0	4.5
 SEX					
Male	7436	47.9	28.2	19.1	4.9
Female	7271	47.8	29.2	18.9	4.1
 AGE					
15 - 24	2559	43.2	33.2	19.3	4.3
25 - 39	3962	50.6	25.5	19.1	4.9
40 - 54	3953	46.0	29.1	20.6	4.3
55 +	4133	50.3	28.3	17.1	4.2
 EDUCATION (end of)					
Until 15 years of age	1403	58.1	23.0	14.1	4.8
16 - 20	6087	49.1	27.5	18.3	5.1
20 +	5237	45.5	30.3	20.6	3.6
Still in education	1756	41.3	32.9	21.4	4.4
 URBANISATION					
Metropolitan	3017	45.2	29.1	22.0	3.7
Urban	6244	48.9	26.7	19.4	5.1
Rural	5378	48.0	30.8	16.9	4.3
 OCCUPATION					
Self-employed	1466	42.2	28.1	23.4	6.3
Employee	5716	44.9	30.5	20.1	4.5
Manual worker	1161	58.9	23.4	14.5	3.2
Not working	6297	49.8	28.2	17.8	4.3
 MAIN HOLIDAY IN 2009					
Domestic	7036	100	0	0	0
Elsewhere in EU	4676	0	100	0	0
Outside the EU	2792	0	0	100	0

Table 8a. Preferred holiday destination – by country

QUESTION: Q7. In which type of destination did you - or will you - spend your main holiday in 2009? If more than one destination, where did you - or you will - stay most of the time?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

	Total N	% A traditional, well-known destination	% A non- traditional, emerging destination	% DK/NA
 EU27	14707	73.7	23.6	2.7
COUNTRY				
 Belgium	559	67.8	28.4	3.7
 Bulgaria	386	75.3	19.7	5
 Czech Rep.	590	81.6	16.5	1.9
 Denmark	861	65.8	30.9	3.3
 Germany	708	69.8	27.2	3
 Estonia	312	75.5	19.2	5.3
 Greece	668	73.3	24.9	1.8
 Spain	547	77.2	21.7	1.1
 France	667	79.7	19.5	0.7
 Ireland	810	70.9	26	3.1
 Italy	486	74.2	24.1	1.8
 Cyprus	365	78.1	20.9	1
 Latvia	219	65.2	30.6	4.2
 Lithuania	267	70.1	27.9	2
 Luxembourg	423	72.5	25.9	1.7
 Hungary	465	83.4	15.4	1.2
 Malta	188	81.8	13.7	4.5
 Netherlands	796	68.5	26.8	4.6
 Austria	743	73.1	25.3	1.5
 Poland	561	70.3	26	3.6
 Portugal	486	82.4	17.3	0.3
 Romania	452	76	20.7	3.3
 Slovenia	376	72.1	24.3	3.6
 Slovakia	422	81.6	16.3	2.1
 Finland	875	70.3	23.8	5.9
 Sweden	848	69.3	27.2	3.4
 United Kingdom	742	73.4	22.3	4.3

Table 8b. Preferred holiday destination – by segments

QUESTION: Q7. In which type of destination did you - or will you - spend your main holiday in 2009? If more than one destination, where did you - or you will - stay most of the time?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

	Total N	% A traditional, well-known destination	% A non- traditional, emerging destination	% DK/NA
EU27	14707	73.7	23.6	2.7
 SEX				
Male	7436	73	24.3	2.7
Female	7271	74.4	22.9	2.6
 AGE				
15 - 24	2559	70.4	27.6	1.9
25 - 39	3962	73.5	24.3	2.2
40 - 54	3953	75	21.8	3.2
55 +	4133	74.6	22.3	3
 EDUCATION (end of)				
Until 15 years of age	1403	78.8	18.7	2.5
16 - 20	6087	75.1	22.1	2.8
20 +	5237	72.3	25.2	2.5
Still in education	1756	69.9	27.6	2.5
 URBANISATION				
Metropolitan	3017	73.3	24	2.7
Urban	6244	74.1	23.3	2.6
Rural	5378	73.6	23.6	2.7
 OCCUPATION				
Self-employed	1466	71.1	25.6	3.3
Employee	5716	73.7	23.6	2.6
Manual worker	1161	75.7	22.7	1.6
Not working	6297	73.9	23.3	2.7
 MAIN HOLIDAY IN 2009				
Domestic	7036	78.3	19.5	2.2
Elsewhere in EU	4676	70.8	26.1	3.1
Outside the EU	2792	68.1	30	1.9

Table 9a. Booking main holiday via a last-minute offer – by country

QUESTION: Q8. Did you - or will you - book your main holiday via a last-minute offer?*Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009*

	Total N	% Yes	% No	% DK/NA
 EU27	14707	11.5	87.1	1.4
COUNTRY				
 Belgium	559	9.9	85.9	4.1
 Bulgaria	386	16.8	79.6	3.6
 Czech Rep.	590	16.1	82	1.9
 Denmark	861	7.8	91.1	1.1
 Germany	708	8.7	90.4	0.9
 Estonia	312	17.9	75.8	6.3
 Greece	668	14.4	84.3	1.3
 Spain	547	21	78.4	0.6
 France	667	9.1	90.7	0.2
 Ireland	810	20.6	78.8	0.7
 Italy	486	7.7	91.4	0.8
 Cyprus	365	17.3	82	0.7
 Latvia	219	14	81.2	4.8
 Lithuania	267	14.4	78.6	7.1
 Luxembourg	423	6.2	93.1	0.7
 Hungary	465	5	93.4	1.6
 Malta	188	18.4	79.6	2
 Netherlands	796	8.5	89.4	2.1
 Austria	743	8.6	89.8	1.6
 Poland	561	7.2	89	3.8
 Portugal	486	10.3	88.5	1.2
 Romania	452	20.1	78	1.9
 Slovenia	376	12.3	86	1.7
 Slovakia	422	13.4	85	1.6
 Finland	875	13.4	82.8	3.8
 Sweden	848	5.9	92.2	1.9
 United Kingdom	742	15.8	83.1	1

Table 9b. Booking main holiday via a last-minute offer – by segments

QUESTION: Q8. Did you - or will you - book your main holiday via a last-minute offer?*Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009*

	Total N	% Yes	% No	% DK/NA
EU27	14707	11.5	87.1	1.4
 SEX				
Male	7436	10.7	87.9	1.4
Female	7271	12.4	86.3	1.3
 AGE				
15 - 24	2559	15.1	83.1	1.8
25 - 39	3962	13.3	85.6	1.1
40 - 54	3953	11.5	87.4	1.1
55 +	4133	7.8	90.8	1.5
 EDUCATION (end of)				
Until 15 years of age	1403	11.8	86.5	1.8
16 - 20	6087	11.7	87.1	1.2
20 +	5237	11.2	87.9	0.8
Still in education	1756	11.9	85.7	2.4
 URBANISATION				
Metropolitan	3017	12.2	86.5	1.3
Urban	6244	11.1	87.3	1.6
Rural	5378	11.8	87.1	1.1
 OCCUPATION				
Self-employed	1466	13.3	85.3	1.5
Employee	5716	12.7	86.3	1
Manual worker	1161	13.6	85.6	0.8
Not working	6297	9.7	88.5	1.7
 MAIN HOLIDAY IN 2009				
Domestic	7036	9.8	89.1	1.1
Elsewhere in EU	4676	11.4	87.1	1.5
Outside the EU	2792	15.1	84	0.9

Table 10a. Reason for booking main holiday via a last-minute offer – by country

QUESTION: Q9_1-9. Why did you – or will you - do so?*Base: those who booked/will book main holiday via a last-minute offer**% of “Mentioned” shown*

	Total N	Lower price of holiday	Late decision about going on holiday	Late decision about where to go	DK/NA
 EU27	1697	53.9	38.3	21.1	5.2
COUNTRY					
 Belgium	56	52	37.7	10.2	9
 Bulgaria	65	45.4	20.7	40.1	14.4
 Czech Rep.	95	74.9	23.2	8.8	1.3
 Denmark	67	56	26	13.9	8.9
 Germany	62	46	40	21.1	5.5
 Estonia	56	70	23.9	8.9	0
 Greece	96	35.7	29.6	23.9	16.9
 Spain	115	62.5	21.2	17	4.8
 France	61	51.8	47.2	16.2	2.3
 Ireland	166	66.9	38.8	27.6	2.5
 Italy	38	57.1	50.2	9.2	2.3
 Cyprus	63	52.8	22.4	39.4	4.5
 Latvia	31	82.2	5.9	7.4	7.5
 Lithuania	38	80.4	5.2	12	2.4
 Luxembourg	26	10.3	56.4	29.2	6.4
 Hungary	23	81.7	11.8	9.5	2.2
 Malta	34	43.8	38.5	21.7	4.4
 Netherlands	68	49.3	37	32.4	3.6
 Austria	64	41.9	43.9	15.2	10.9
 Poland	41	59.4	33.3	10.9	4.9
 Portugal	50	59.5	29.1	19.5	0
 Romania	91	37.3	35.7	25.7	7.8
 Slovenia	46	63.6	29.9	10	14.1
 Slovakia	57	70.9	16.7	3.6	18
 Finland	117	42.8	46.9	22.3	5.2
 Sweden	50	36.9	40.9	13.1	18.8
 United Kingdom	117	55.9	52.2	33.4	3.8

Table 10b. Reason for booking main holiday via a last-minute offer – by segments

QUESTION: Q9_1-9. Why did you do so?*Base: those who booked/will book main holiday via a last-minute offer**% of “Mentioned” shown*

	Total N	Lower price of holiday	Late decision about going on holiday	Late decision about where to go	DK/NA
EU27	1697	53.9	38.3	21.1	5.2
 SEX					
Male	795	53.1	40.3	22.1	5.3
Female	902	54.7	36.5	20.2	5.2
 AGE					
15 - 24	387	41.5	55.1	21.8	2.3
25 - 39	525	57.1	33.9	18.8	5.1
40 - 54	454	57	35.2	23.9	4.5
55 +	322	59.9	29.4	20.2	9.9
 EDUCATION (end of)					
Until 15 years of age	165	67.8	34.6	21.9	2.6
16 - 20	712	53.1	39.9	20.4	4.6
20 +	588	55.8	32.8	20.3	6.2
Still in education	208	42.6	51.9	24.4	4
 URBANISATION					
Metropolitan	369	61.6	38.4	15.1	4.5
Urban	691	53.3	36.9	24.2	5.7
Rural	633	49.9	39.4	21.3	5.2
 OCCUPATION					
Self-employed	195	47.1	47.9	25.2	7.7
Employee	727	57.4	36.1	18.4	4.8
Manual worker	158	48.1	40	26.7	2.1
Not working	613	53.8	37.4	21.4	5.8
 MAIN HOLIDAY IN 2009					
Domestic	688	50.6	35.7	21.3	7
Elsewhere in EU	532	57.1	38.2	24.7	3
Outside the EU	422	55.3	42.5	15.9	5.8

Table 11a. The most important consideration when deciding on holiday destination or accommodation – by country

QUESTION: Q10a. When you decided on your main holiday in 2009 - or when you will take a decision about your main holiday in 2009 - which of the following considerations was – or will be – the most important in your decision for a holiday destination or accommodation?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

	Total N	% Quality of service	% Price	% Value for money	% Cultural attractiveness	% Eco-friendliness	% Social considerations (e.g. labour conditions, respect for the host community)	% Safety/security	% Other	% DK/NA
 EU27	14707	8.7	14.8	27.9	15.1	3.8	4.9	4.4	17.1	3.3
COUNTRY										
 Belgium	559	8.7	12.4	20.1	15.7	3.6	8.5	3.6	16.2	11.2
 Bulgaria	386	13.1	17.2	40.8	5	8.6	3	2.7	6.2	3.4
 Czech Rep.	590	24	30.3	10.4	16	2.1	2.1	2.1	11.2	1.8
 Denmark	861	13.4	13.3	8.1	27.2	0.6	11.1	9.2	13.8	3.2
 Germany	708	8.1	6.4	38.7	16	3.4	5.4	4.4	15.6	2.1
 Estonia	312	7.3	14.9	27	15.5	4.2	5.8	6.3	12.6	6.4
 Greece	668	7.6	23.6	14.8	7.7	10.6	12	6	15.8	1.9
 Spain	547	7.8	16.8	31.9	19.5	3	4.5	0.9	13.7	2
 France	667	5.6	14.9	29.7	13.8	4.7	0.5	3.8	25.7	1.3
 Ireland	810	8.3	15.8	34.7	13.2	2.3	4.7	4.9	14.4	1.8
 Italy	486	7.7	9.3	40.7	13.1	2.6	0.9	3.2	17	5.5
 Cyprus	365	13.1	24	9.3	5.2	12.5	10.8	6.3	18	1
 Latvia	219	6.9	24.1	12.5	17.3	7.3	6.3	2.3	14.1	9.2
 Lithuania	267	4.4	22.8	34.1	8.9	8	3.5	6.6	8.1	3.5
 Luxembourg	423	11.3	9.4	24.4	22.1	2	3.9	6.9	17.3	2.8
 Hungary	465	11.4	27.5	19.8	10.4	7.3	1.4	7.2	13.4	1.6
 Malta	188	5.2	16.6	22.1	18.1	2.6	0.8	4.7	18.7	11.1
 Netherlands	796	11	15.7	12.6	16.8	2.4	14.3	3.8	19	4.4
 Austria	743	7.9	7.2	36.4	15	2.5	6.3	3.3	16.9	4.5
 Poland	561	5.9	27.3	9.8	20.1	8.4	5	4.9	13.8	4.7
 Portugal	486	13.3	12.9	32.5	6.2	9.8	2.6	3.2	17.9	1.6
 Romania	452	14.4	25	22.2	9.9	3.9	3.4	8.9	9.6	2.7
 Slovenia	376	14.1	24.5	3.1	10	13.5	4.7	8.5	18.5	3.1
 Slovakia	422	15.5	19.5	33.3	12.1	1.2	1.4	1.1	13.4	2.5
 Finland	875	6.4	14.9	16.3	21.6	3.9	12.4	5.9	12.9	5.7
 Sweden	848	9.2	13.7	11	14.9	1.8	20.2	4.7	19.8	4.6
 United Kingdom	742	9.2	15.1	25.9	14.6	1	4.5	6.4	19.2	4.1

Table 11b. The most important consideration when deciding on holiday destination or accommodation – by segments

QUESTION: Q10a. When you decided on your main holiday in 2009 - or when you will take a decision about your main holiday in 2009 - which of the following considerations was – or will be – the most important in your decision for a holiday destination or accommodation?

Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009

	Total N	% Quality of service	% Price	% Value for money	% Cultural attractiveness	% Eco-friendliness	% Social considerations (e.g. labour conditions, respect for the host community)	% Safety/security	% Other	% DK/NA
EU27	14707	8.7	14.8	27.9	15.1	3.8	4.9	4.4	17.1	3.3
 SEX										
Male	7436	9.5	13.9	27.8	14.6	3.7	5.2	4.4	17.4	3.5
Female	7271	7.8	15.6	28	15.7	3.8	4.7	4.5	16.8	3
 AGE										
15 - 24	2559	6.8	19.3	28.4	16.3	3.2	5.2	4.7	12.7	3.2
25 - 39	3962	7.8	16.6	31.6	13.2	3.5	5	4.5	14.9	3
40 - 54	3953	9.3	15.3	27.5	15.1	4.2	3.9	3.8	18.1	2.7
55 +	4133	9.9	9.8	24.3	16.4	4	5.7	4.9	21	3.9
 EDUCATION (end of)										
Until 15 years of age	1403	11.4	14.5	28.2	8.8	3.8	3.8	4.4	21	4.1
16 - 20	6087	8.9	16.5	28.1	13.2	3.7	4.7	4.7	17.1	3
20 +	5237	8.2	11.6	28.1	18.7	3.7	5.3	3.7	18.2	2.6
Still in education	1756	6.8	19.1	27.6	16.3	4.2	5.9	5.1	10.4	4.7
 URBANISATION										
Metropolitan	3017	7.5	13.6	27	17	3.2	4.9	4.3	19.1	3.5
Urban	6244	8.3	15.4	27.7	14.7	4.3	5.3	4.3	17.1	2.9
Rural	5378	9.8	14.5	28.7	14.8	3.6	4.6	4.6	15.8	3.5
 OCCUPATION										
Self-employed	1466	11.8	12.4	22.9	16.9	4.1	4.1	5.6	18	4.3
Employee	5716	8.9	13.4	30.2	15.6	3.6	4.9	3.9	17.2	2.3
Manual worker	1161	6.2	25.1	26.6	8.1	4.3	5.5	3.5	17.1	3.7
Not working	6297	8.2	14.5	27.1	15.7	3.8	5.1	4.9	16.9	3.7
 MAIN HOLIDAY IN 2009										
Domestic	7036	8.1	16.9	27.9	11.9	5	5	3.9	18.2	3.1
Elsewhere in EU	4676	9.1	14	26	18.7	2.9	5.4	4.4	16.2	3.2
Outside the EU	2792	9.3	10.4	30.9	17.6	2.2	4	5.8	16.5	3.3

Table 12a. The second most important consideration when deciding on holiday destination or accommodation – by country

QUESTION: Q10b. And which of these considerations was - or will be - the second most important?*Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009*

	Total N	% None	% Quality of service	% Price	% Value for money	% Cultural attractiveness	% Eco-friendliness	% Social considerations (e.g. labour conditions, respect for the host community)	% Safety/security	% Other	% DK/NA
 EU27	14227	11.5	14.4	12.5	16.5	16.1	6.5	5.4	7.6	7.1	2.4
COUNTRY											
 Belgium	496	17.7	15.5	16.2	10.4	16.1	5.3	5.1	3.8	7.4	2.6
 Bulgaria	373	2.8	11.6	15.4	16	8.3	16.1	4.4	14.5	5.7	5.3
 Czech Rep.	579	4.5	24.7	24.4	12.4	13.4	3.9	0.9	8.9	5.3	1.7
 Denmark	833	12.1	11.8	14.1	12.6	15.9	1.5	8.7	11.8	9.6	2
 Germany	693	4.2	14	6.5	20.7	20.1	7.5	9.3	7.3	8.6	1.8
 Estonia	293	1.8	11.9	12.3	16	18.4	7.2	2.6	14	6.8	8.9
 Greece	656	20.7	13.2	12.1	7.9	8.6	13.1	7.7	7	7.9	1.9
 Spain	536	17.2	11.7	12.3	17.8	22.4	3.1	3.9	2.9	6.9	1.9
 France	658	25.3	8.8	11.5	13.6	14.5	9.4	2.1	5.7	7	1.9
 Ireland	796	3.9	14.7	12.7	22	18.5	3	5.8	11.7	6.7	0.9
 Italy	460	21.6	16.2	10.8	13.9	18.1	2.4	2.7	6.9	5.9	1.3
 Cyprus	361	10	14.8	15.6	9.1	8.4	11.2	8.6	12.4	7.7	2.3
 Latvia	199	1.2	9.8	17.9	11.6	17.9	6.6	12.4	10.7	5.6	6.4
 Lithuania	257	2.3	15.8	11.5	17.5	13.4	12.5	3.8	14.6	1.8	6.8
 Luxembourg	411	9.4	14.9	6.6	17.4	21.7	7.5	4.7	8.4	8.9	0.5
 Hungary	457	5	13.9	14.5	14.4	12.9	12.6	4	12.5	7.8	2.4
 Malta	167	17.4	17.7	4.4	17.6	10.5	7.6	0	8.8	6.1	10
 Netherlands	761	13.8	16.8	13.4	14.1	11.2	5.1	8.3	5.6	9.6	2.1
 Austria	709	9.9	15	4.9	17	17.6	5.8	8.4	10.1	8.6	2.6
 Poland	535	5.9	16.9	17.6	9.3	16.3	10.9	4.6	8.1	5.1	5.3
 Portugal	478	11.8	14	16.8	15.9	8.3	11.4	4.4	11.5	5.3	0.5
 Romania	440	7.5	21.1	19.5	17.6	7.9	3.9	3.2	10.5	4.5	4.2
 Slovenia	364	8.1	15.6	21.4	6.1	12.4	12.2	5.4	10.1	5.4	3.4
 Slovakia	412	9.4	15.2	18.4	14.9	14.6	4.2	2.9	7.1	11.1	2.2
 Finland	826	8.4	13.3	14	18.1	11.5	6	9.5	10.3	4.1	4.9
 Sweden	809	12.1	11.3	13.4	13.9	12.2	2.8	11.3	8.6	8.7	5.8
 United Kingdom	712	2.9	16.8	15.8	22.2	15.1	4.2	4.3	9.3	7	2.3

Table 12b. The second most important consideration when deciding on holiday destination or accommodation – by segments

QUESTION: Q10b. And which of these considerations was - or will be - the second most important?*Base: those who went on holiday or took a short trip in 2009, and/or still plan to go on a holiday or take short trip in 2009*

	Total N	% None	% Quality of service	% Price	% Value for money	% Cultural attractiveness	% Eco-friendliness	% Social considerations (e.g. labour conditions, respect for the host community)	% Safety/security	% Other	% DK/NA
EU27	14227	11.5	14.4	12.5	16.5	16.1	6.5	5.4	7.6	7.1	2.4
 SEX											
Male	7178	11.8	13.6	12.5	16.9	16.4	6.7	5.4	7.2	7.2	2.3
Female	7049	11	15.2	12.6	16	15.9	6.2	5.4	8	7.1	2.6
 AGE											
15 - 24	2476	7.4	16.2	15.1	17.1	16.1	5.1	6.7	9	5.4	1.9
25 - 39	3843	10.6	15.2	13.9	16.4	16.8	6.6	4.3	6.8	7.2	2.2
40 - 54	3847	12.2	13.7	11.9	17.2	16.5	6	5.2	7.6	7.6	2
55 +	3970	14.1	13	10.5	15.5	15.1	7.7	5.6	7.5	7.7	3.3
 EDUCATION (end of)											
Until 15 years of age	1345	17.3	15.2	11.9	15	13.6	6	5.4	7.3	5.2	3
16 - 20	5905	11.4	14.6	13	16.2	15	6.6	4.9	8.6	7.6	2.1
20 +	5101	10.8	13	11.3	17.9	18	6.9	5.5	6.4	7.6	2.6
Still in education	1673	7.7	18	15.5	14.6	16.9	5.1	7	7.4	5.2	2.6
 URBANISATION											
Metropolitan	2911	12.1	13.4	14.3	15.2	16.3	5.9	5.3	7.5	7.1	2.8
Urban	6064	12.2	14.9	13.3	14.9	16.1	5.8	5.3	7.5	7.3	2.7
Rural	5188	10.2	14.4	10.6	19.1	16.1	7.6	5.6	7.7	6.8	1.9
 OCCUPATION											
Self-employed	1404	11.9	15.2	14.5	16.4	13.8	8	5.4	6.2	6.2	2.4
Employee	5582	10.6	13.8	12.9	17.5	17.6	5.5	4.9	7.9	7.1	1.9
Manual worker	1118	14.5	14	13.4	16.1	14.4	8.2	4.5	6.8	6.4	1.8
Not working	6064	11.5	14.8	11.6	15.6	15.7	6.7	6	7.7	7.3	3
 MAIN HOLIDAY IN 2009											
Domestic	6817	14.6	13.7	12.5	14.8	14.2	8.1	5.3	7.4	6.6	2.7
Elsewhere in EU	4527	8.2	13.9	12.4	20.7	17.1	5.7	5.1	7.9	7	2.1
Outside the EU	2699	9.4	16.5	12.6	14.1	18.6	4	6.2	7.3	8.9	2.3

Table 13a. Environmental considerations when deciding on holidays – by country

QUESTION: Q11. Do you consider environmental issues when making decisions about your holidays, such as the facilities provided at the destination or offered by service providers (e.g. accommodation with an eco-label, responsible travel, minimising impact on the local environment)?

	Total N	% Yes, environmental considerations already have an impact on my holiday plans	% Yes, I will consider environmental issues in the future, but I did not consider them yet	% No, environmental considerations will not impact my holiday plans	% I am not aware of the level of environmental protection at my holiday destinations	% I have no knowledge of this topic	% I never go on holiday	% DK/NA
 EU27	23606	31	11	34.5	3.9	4.6	11.8	3.2
COUNTRY								
 Belgium	1000	23.4	5	31.2	1.8	1.3	30.3	7.1
 Bulgaria	1005	39	5.4	9.5	5.7	12.4	18.7	9.4
 Czech Rep.	1003	11	5.7	64.9	2.8	7	7.2	1.5
 Denmark	1001	17.6	8.4	60.2	4.7	3.6	3.8	1.7
 Germany	1009	34.1	12.8	43.1	1.4	1.1	5.9	1.5
 Estonia	512	26.8	12.8	30.9	7.1	5.5	10.3	6.6
 Greece	1001	40.6	12	24.7	3.6	7.3	9.6	2.2
 Spain	1005	34.9	9.4	33	4	3.9	13.2	1.6
 France	1000	27.1	10.7	51.6	0.1	0.3	9.2	1.1
 Ireland	1000	20.1	16.3	54.9	3.2	1.8	2.2	1.4
 Italy	1005	35.8	5.9	13.6	8.1	9.3	21.5	5.8
 Cyprus	500	36.7	13.5	27	3.7	10.4	6.9	1.9
 Latvia	500	29.4	8	23.3	9	8.4	13.9	8
 Lithuania	500	32.9	12.8	22.9	3.9	9.1	11.2	7.3
 Luxembourg	511	40.1	13.1	40.5	0.9	0	3.9	1.6
 Hungary	1007	26.1	5.8	28.4	6.4	6.4	24.4	2.5
 Malta	505	35.6	5.7	25	7.1	2.7	17.7	6.1
 Netherlands	1001	24.4	7.8	57.2	2.4	0.3	4.8	3
 Austria	1000	38.3	8.8	39.8	0.1	0.7	9.9	2.3
 Poland	1013	37.5	16.8	16.9	5.1	7.3	10	6.5
 Portugal	1001	43.4	3.6	20.5	1.9	2	25.1	3.6
 Romania	1010	36.5	11.4	10.3	1.7	7.6	27.8	4.7
 Slovenia	501	32.3	14.5	37.4	1.9	2	7.8	4.1
 Slovakia	1014	24.8	8.2	35.2	4	6.7	17.9	3.3
 Finland	1001	34.7	11.3	43.7	1.9	1.6	3.6	3.2
 Sweden	1001	26.5	10.3	51	1.7	3.1	3.8	3.5
 United Kingdom	1000	21	17.3	38.1	8.6	7.6	5.2	2.3

Table 13b. Environmental considerations when deciding on holidays – by country

QUESTION: Q11. Do you consider environmental issues when making decisions about your holidays, such as the facilities provided at the destination or offered by service providers (e.g. accommodation with an eco-label, responsible travel, minimising impact on the local environment)?

	Total N	% Yes, environmental considerations already have an impact on my holiday plans	% Yes, I will consider environmental issues in the future, but I did not consider them yet	% No, environmental considerations will not impact my holiday plans	% I am not aware of the level of environmental protection at my holiday destinations	% I have no knowledge of this topic	% I never go on holiday	% DK/NA
EU27	23606	31	11	34.5	3.9	4.6	11.8	3.2
 SEX								
Male	11405	30.8	10.4	38.1	3.6	4.6	9.9	2.6
Female	12201	31.3	11.6	31	4.2	4.6	13.6	3.7
 AGE								
15 - 24	3426	32.4	14.8	38.2	3.6	4.3	3.4	3.1
25 - 39	5842	31.2	13.3	38.9	4.1	3.8	5.7	3.1
40 - 54	6019	33.7	10.2	35.1	4.9	5	8.7	2.4
55 +	8075	28.7	8.5	29.3	3.2	5.1	21.7	3.5
 EDUCATION (end of)								
Until 15 years of age	3895	23.6	7.8	23.8	4	6.7	30.9	3.3
16 - 20	9964	30.5	10.7	36.2	4.5	5.1	9.9	3.1
20 +	6760	36.8	12.1	38.7	3.1	2.8	4	2.4
Still in education	2331	31.9	15.6	35.4	4.1	4.6	4.6	3.8
 URBANISATION								
Metropolitan	4207	32.5	10.9	37	4.4	4.9	6.4	3.9
Urban	10013	32	10.7	33.3	4.1	5.1	11.3	3.4
Rural	9217	29.4	11.6	34.6	3.4	3.9	14.7	2.4
 OCCUPATION								
Self-employed	2095	34.1	11.3	36.8	3.8	5	6.6	2.4
Employee	7514	32.2	12	42.6	4.4	3.2	3.7	1.8
Manual worker	2010	30.9	12.4	35.4	2.8	4.8	10.9	2.8
Not working	11838	29.8	10.2	28.9	3.7	5.4	18.1	4
 MAIN HOLIDAY IN 2009								
Domestic	7036	40.4	12.3	36.8	3.6	4.1	0.2	2.6
Elsewhere in EU	4676	31.4	12.7	46.1	3.7	3.7	0.2	2.1
Outside the EU	2792	32.5	14	43	4.8	2.9	0.1	2.6

Table 14a. Having the necessary financial resources for the planned holidays – by country

QUESTION: Q12. Will you have the necessary financial resources to be able to afford some type of holiday in 2010?

	Total N	% Yes, without any major difficulties	% Yes, but I will need to make extra savings	% No, not without going into debt	% No, I cannot afford a holiday given the current financial situation	% I never go on holiday	% DK/NA
 EU27	23606	30.7	29.2	3.1	15	10.5	11.5
COUNTRY							
 Belgium	1000	35.8	13.7	2.7	10.7	29.4	7.7
 Bulgaria	1005	11.8	22.3	3.4	27.1	14.6	20.8
 Czech Rep.	1003	24.4	28.1	5	16.5	9.7	16.2
 Denmark	1001	73.6	13.5	2.2	4	3.7	3
 Germany	1009	33.8	35.4	2.2	16.3	5.7	6.7
 Estonia	512	16.8	32.4	2.8	28.2	7.9	11.9
 Greece	1001	24.4	33	1.7	17.9	6.3	16.8
 Spain	1005	25.3	27.1	5.8	16.5	10.9	14.4
 France	1000	27.2	37	1.8	14.1	7.8	12.1
 Ireland	1000	30.3	38.1	3.3	16.1	1.6	10.6
 Italy	1005	23.8	25.6	4.7	13.7	19.9	12.3
 Cyprus	500	27	34	3.4	10.6	7.4	17.6
 Latvia	500	8.5	24.9	4.7	26.5	13.8	21.6
 Lithuania	500	14.6	30.3	3.2	22.5	12.2	17.3
 Luxembourg	511	57.8	26.8	1.2	5.2	3.5	5.5
 Hungary	1007	11.8	26.6	1.4	27.7	21.4	11.1
 Malta	505	15.1	28.5	2.1	26.2	15.4	12.7
 Netherlands	1001	54.7	19.9	3.2	10.4	4.4	7.4
 Austria	1000	46.6	24.6	1.1	6.5	11.3	9.8
 Poland	1013	26.7	23.9	2.6	20.8	7.9	18
 Portugal	1001	26.7	22.2	3.3	12.5	23.7	11.6
 Romania	1010	12	26.6	3.1	20.9	22.6	14.6
 Slovenia	501	34.4	33.7	4.2	14	5.4	8.3
 Slovakia	1014	24.1	19.8	5	17.3	18.8	15
 Finland	1001	65.4	19.4	0.1	5.4	3.2	6.4
 Sweden	1001	57.2	22.3	0.7	5.9	3.6	10.3
 United Kingdom	1000	41.7	33.2	3.1	9.4	3.8	8.8

Table 14b. Having the necessary financial resources for the planned holidays – by segments

QUESTION: Q12. Will you have the necessary financial resources to be able to afford some type of holiday in 2010?

	Total N	% Yes, without any major difficulties	% Yes, but I will need to make extra savings	% No, not going into debt	% No, I cannot afford a holiday given the current financial situation	% I never go on holiday	% DK/NA
EU27	23606	30.7	29.2	3.1	15	10.5	11.5
 SEX							
Male	11405	36.1	27.6	3	13.9	8.4	10.9
Female	12201	25.7	30.7	3.1	16.1	12.4	12
 AGE							
15 - 24	3426	32.4	39.5	3.4	10.7	3	11
25 - 39	5842	29.6	35.4	3.6	14.4	4.4	12.6
40 - 54	6019	31.8	29.3	3.3	16.3	7.3	12
55 +	8075	30.2	20.8	2.4	16.2	20.1	10.3
 EDUCATION (end of)							
Until 15 years of age	3895	17.7	19.4	2.9	20.8	27.2	12.1
16 - 20	9964	28.5	30.7	3.5	17.3	8.5	11.4
20 +	6760	42.6	30.9	2.3	9.9	3.7	10.6
Still in education	2331	31.6	38.3	4	9.8	4.3	11.9
 URBANISATION							
Metropolitan	4207	38.8	29.4	3.4	10.2	5.6	12.6
Urban	10013	29.2	30.6	3.5	15	10.1	11.7
Rural	9217	29	27.9	2.5	17.4	12.9	10.2
 OCCUPATION							
Self-employed	2095	42.1	25.7	3.7	10.5	5.8	12.2
Employee	7514	39.2	34.5	2.7	10.3	3.1	10.3
Manual worker	2010	18.7	32.8	4.3	23	6.9	14.3
Not working	11838	25.6	26	3	17.5	16.5	11.4
 MAIN HOLIDAY IN 2009							
Domestic	7036	38.1	36.2	3.1	8.3	0.5	13.8
Elsewhere in EU	4676	46.1	34.4	2.1	7.1	0.2	10
Outside the EU	2792	49	31.6	2.1	7.5	0.6	9.3

Table 15a. Holiday plans for 2010 – by country

QUESTION: Q13. What kind of holiday are you planning in 2010?

	Total N	% A holiday with more than 13 consecutive nights spent away from home	% A holiday with more than four consecutive nights away from home	% Short-stay trip(s) (1-3 nights) only	% A combination of a long holiday and shorter trips	% No decision yet	% I will not go on holiday	% DK/NA
 EU27	14875	26.6	25.7	5.7	7.6	31.9	1.5	1.1
COUNTRY								
 Belgium	523	26.5	21.2	3.9	7	37	2.3	2.2
 Bulgaria	377	13.2	35.4	6.8	5	35.7	1.3	2.6
 Czech Rep.	577	23.7	32.2	6.3	8.7	23.8	2	3.3
 Denmark	894	32.3	31.7	2.7	5.8	25.7	1.4	0.5
 Germany	720	31.8	23.3	4.1	8.5	30.8	1.5	0
 Estonia	266	17.2	26.6	12.9	5.9	30.1	3.8	3.6
 Greece	592	23	36.9	12.3	12.7	14.2	0.2	0.7
 Spain	584	20.4	26.8	6.9	3	41.2	0.5	1.3
 France	660	37.4	27.2	3.8	5.5	23.2	1	1.9
 Ireland	716	24.6	28	8.3	12.8	25.6	0.6	0.2
 Italy	544	18.1	28.1	6	2.8	42.2	2.2	0.6
 Cyprus	322	14.9	41	8.2	3.4	27.8	0.2	4.5
 Latvia	191	14.4	24.5	14.6	1.2	36	7.2	2
 Lithuania	240	12.3	22.6	11.3	4.7	48.3	0.2	0.5
 Luxembourg	438	31	18.5	4.5	17.2	27.3	1.3	0.2
 Hungary	400	19	35.8	18.4	5.7	19.4	1.4	0.3
 Malta	231	12	53.3	5.7	0.6	24.7	2.5	1.1
 Netherlands	778	35.1	10.4	3.9	9.2	39.1	1.8	0.5
 Austria	723	26.5	27.3	9.6	14.4	20.9	0.7	0.6
 Poland	540	26.4	25.1	5.9	6.6	31.9	0.6	3.6
 Portugal	523	27.9	23.8	2.3	3.6	39.5	1.7	1.2
 Romania	422	15.5	32.4	12	5.8	32.2	1.2	1.1
 Slovenia	362	20.2	40.6	6.4	9	20.9	1.5	1.3
 Slovakia	496	24.7	38.7	6.3	2.6	21.6	3.3	2.9
 Finland	850	18.6	26.3	11	9.5	33.3	0.8	0.5
 Sweden	802	18.4	26.3	7.1	11.1	34.3	2.5	0.4
 United Kingdom	779	25.5	22.5	4.2	13.2	31.5	2.5	0.7

Table 15b. Holiday plans for 2010 – by segments

QUESTION: Q13. What kind of holiday are you planning in 2010?

	Total N	% A holiday with more than 13 consecutive nights spent away from home	% A holiday with more than four consecutive nights away from home	% Short-stay trip(s) (1 - 3 nights) only	% A combination of a long holiday and shorter trips	% No decision yet	% I will not go on holiday	% DK/NA
EU27	14875	26.6	25.7	5.7	7.6	31.9	1.5	1.1
 SEX								
Male	7619	26.4	25.6	5.6	7.5	32.3	1.4	1.1
Female	7256	26.9	25.8	5.7	7.6	31.4	1.6	1.1
 AGE								
15 - 24	2580	21.3	28.1	6.3	7.7	35.1	0.6	0.9
25 - 39	4007	24.8	28	5.5	7.4	32.4	0.8	1.1
40 - 54	3877	27.8	24.3	5.5	9.5	30.7	1.5	0.7
55 +	4314	30.6	23.5	5.6	5.9	30.3	2.7	1.4
 EDUCATION (end of)								
Until 15 years of age	1556	23.6	27.9	6.8	3.4	34.6	2.6	1
16 - 20	6246	27.4	25.4	5.9	6	32.7	1.7	1
20 +	5121	28.4	25.1	4.9	11	28.3	1.1	1.1
Still in education	1725	22.2	27.3	6	6.8	36	0.9	0.9
 URBANISATION								
Metropolitan	3012	32.1	21.8	4.6	8.3	30.5	0.9	1.7
Urban	6338	25.3	25.9	5.5	8.7	32	1.6	1
Rural	5480	25.2	27.7	6.4	5.8	32.3	1.7	0.7
 OCCUPATION								
Self-employed	1498	28.2	23.3	6.8	11.3	28.8	0.8	0.9
Employee	5738	27.1	27	4.5	9.4	30.1	1	1
Manual worker	1121	24.3	27.5	6.8	4.5	35.6	0.7	0.7
Not working	6463	26.3	24.9	6.3	5.7	33.3	2.3	1.2
 MAIN HOLIDAY IN 2009								
Domestic	5448	25.9	29.5	6.5	6.9	29.7	0.5	1.1
Elsewhere in EU	3866	28.6	25.2	5.1	9.3	30.6	0.6	0.7
Outside the EU	2307	36.8	19.6	1.8	12.9	27.9	0.3	0.8

II. Survey details

This general population survey “*Survey on the Attitudes of Europeans towards Tourism*” (No 281) was conducted for the European Commission, Directorate-General for Enterprise and Industry – 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).

Telephone interviews were conducted in each country between the 07/09/2009 and the 11/09/2009 by the following institutes:

Belgium	BE	Gallup Europe	(Interviews: 07/09/2009 - 11/09/2009)
Czech Republic	CZ	Focus Agency	(Interviews: 07/09/2009 - 11/09/2009)
Denmark	DK	Hermelin	(Interviews: 07/09/2009 - 11/09/2009)
Germany	DE	IFAK	(Interviews: 07/09/2009 - 11/09/2009)
Estonia	EE	Saar Poll	(Interviews: 07/09/2009 - 11/09/2009)
Greece	EL	Metroanalysis	(Interviews: 07/09/2009 - 11/09/2009)
Spain	ES	Gallup Spain	(Interviews: 07/09/2009 - 11/09/2009)
France	FR	Efficiencie3	(Interviews: 07/09/2009 - 11/09/2009)
Ireland	IE	Gallup UK	(Interviews: 07/09/2009 - 11/09/2009)
Italy	IT	Demoskopoea	(Interviews: 07/09/2009 - 11/09/2009)
Cyprus	CY	CYMAR	(Interviews: 07/09/2009 - 11/09/2009)
Latvia	LV	Latvian Facts	(Interviews: 07/09/2009 - 11/09/2009)
Lithuania	LT	Baltic Survey	(Interviews: 07/09/2009 - 11/09/2009)
Luxembourg	LU	Gallup Europe	(Interviews: 07/09/2009 - 11/09/2009)
Hungary	HU	Gallup Hungary	(Interviews: 07/09/2009 - 11/09/2009)
Malta	MT	MISCO	(Interviews: 07/09/2009 - 11/09/2009)
Netherlands	NL	MSR	(Interviews: 07/09/2009 - 11/09/2009)
Austria	AT	Spectra	(Interviews: 07/09/2009 - 11/09/2009)
Poland	PL	Gallup Poland	(Interviews: 07/09/2009 - 11/09/2009)
Portugal	PT	Consulmark	(Interviews: 07/09/2009 - 11/09/2009)
Slovenia	SI	Cati d.o.o	(Interviews: 07/09/2009 - 11/09/2009)
Slovakia	SK	Focus Agency	(Interviews: 07/09/2009 - 11/09/2009)
Finland	FI	Norstat Finland Oy	(Interviews: 07/09/2009 - 11/09/2009)
Sweden	SE	Hermelin	(Interviews: 07/09/2009 - 11/09/2009)
United Kingdom	UK	Gallup UK	(Interviews: 07/09/2009 - 11/09/2009)
Bulgaria	BG	Vitoshia	(Interviews: 07/09/2009 - 11/09/2009)
Romania	RO	Gallup Romania	(Interviews: 07/09/2009 - 11/09/2009)

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 500 interviews in Estonia, Cyprus, Latvia, Lithuania, Luxembourg, Malta and 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	23606	100	23606	100
BE	1000	4.2	498	2.1
BG	1005	4.3	376	1.6
CZ	1003	4.3	499	2.1
DK	1001	4.2	251	1.1
DE	1009	4.3	4013	17.0
EE	512	2.2	65	0.3
EL	1001	4.2	542	2.3
ES	1005	4.3	2152	9.1
FR	1000	4.2	2923	12.4
IE	1000	4.2	195	0.8
IT	1005	4.3	2877	12.2
CY	500	2.1	36	0.2
LV	500	2.1	111	0.5
LT	500	2.1	161	0.7
LU	511	2.2	22	0.1
HU	1007	4.3	483	2.0
MT	505	2.1	19	0.1
NL	1001	4.2	759	3.2
AT	1000	4.2	397	1.7
PL	1013	4.3	1818	7.7
PT	1001	4.2	507	2.1
RO	1010	4.3	1033	4.4
SI	501	2.1	98	0.4
SK	1014	4.3	256	1.1
FI	1001	4.2	248	1.0
SE	1001	4.2	428	1.8
UK	1000	4.2	2839	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. Did you go on a holiday or take a short private trip in 2009 where you were away from home for a minimum of one night? This excludes business travel.

[READ OUT]

Yes, I went on a holiday or took a short trip in 2009, and I am not planning any other holidays or short trips in 2009.....	1
Yes, I went on a holiday or took a short trip in 2009, and I still plan other holidays or short trips in 2009	2
No, but I still plan to go on a holiday or take a short trip in 2009	3
No, I will not go on any holiday in 2009.....	4
[DK/NA].....	9

ASK ALL RESPONDENTS

Q2. Under the current economic conditions, did you have to cut back in 2009 on the budget that you normally spend on holidays?

Yes, I had to cut back	1
No, but I decided to cut back as a precaution	2
No	3
[I never go on holiday]	4
[DK/NA].....	9

ASK IF [Q1=1] AND [Q2= 1 OR 2]

Q3a. How did you cut back on your holiday budget in 2009? What was the most important change that you made?

ASK IF [Q1=2] AND [Q2= 1 OR 2]

Q3a. How did you – or will you – cut back on your holiday budget in 2009? What was – or will be – the most important change that you made – or will make?

ASK IF [Q1=3] AND [Q2= 1 OR 2]

Q3a. How will you cut back on your holiday budget in 2009? What will be the most important change that you will make?

[ROTATE - READ OUT - ONLY ONE ANSWER]

Fewer holidays or short trips	1
Reduced length of holiday or short trips	2
Cheaper means of transport	3
Cheaper accommodation	4
A holiday closer to home	5
Changes in the period of travel (not peak season)	6
[Other]	7
[DK/NA].....	9

ASK IF [Q1=1] AND [Q2= 1 OR 2]

Q3b. And what was the second most important change?

ASK IF [Q1=2] AND [Q2= 1 OR 2]

Q3b. And what was – or will be – the second most important change?

ASK IF [Q1=3] AND [Q2= 1 OR 2]

Q3b. And what will be the second most important change?

[ROTATE - READ OUT - ONLY ONE ANSWER]

Fewer holidays or short trips	1
Reduced length of holiday or short trips	2
Cheaper means of transport	3
Cheaper accommodation	4
A holiday closer to home	5
Changes in the period of travel (not peak season)	6
[Other]	7
[DK/NA].....	9

ASK IF [Q1=1]

Q4. If you had to reduce your spending on leisure activities when you were on holiday in 2009, on which kind of leisure activity did you make the most reduction?

[ROTATE - READ OUT - ONLY ONE ANSWER]

Entertainment (movies; theatres)	1
Cultural activities	2
Restaurants and cafes	3
Shopping.....	4
Beauty/Wellness treatments.....	5
Sports and other activities.....	6
Other.....	7
I did not have to reduce spending	8
[DK/NA].....	99

[INTERVIEWER]

IF [Q1=1]

I would now like to ask you some questions about your main holiday in 2009. If you went on only one holiday or took only one short trip in 2009, this was your main holiday. If you went on more than one holiday or short trip in 2009, your main holiday was the longest one, or if two or more were of equal length, then it would be the one in – or nearest to – the peak summer period.

IF [Q1=2]

I would now like to ask you some questions about your main holiday in 2009. Your main holiday would be your longest holiday or short trip in 2009, or if you took – or will take – two or more trips of equal length in 2009, your main holiday would be the one in – or nearest to – the peak summer period.

IF [Q1=3]

I would now like to ask you some questions about your main holiday in 2009. If you go on only one holiday or take only one short trip in 2009, this will be your main holiday. If you go on more than one holiday or short trip in 2009, your main holiday will be the longest one, or if two or more are of equal length, then it will be the one in – or nearest to – the peak summer period.

ASK IF [Q1=1]

Q5. In which month of 2009 did you start your main holiday?

ASK IF [Q1=2]

Q5. In which month of 2009 did you – or will you – start your main holiday?

ASK IF [Q1=3]

Q5. In which month of 2009 will you start your main holiday?

.....Month
 [DK/NA].....99

ASK IF [Q1=1]

Q6. Where did you travel for your main holiday in 2009? If more than one place, where did you stay most of the time?

ASK IF [Q1=2]

Q6. Where did you – or will you – travel for your main holiday in 2009? If more than one place, where did you – or you will – stay most of the time?

ASK IF [Q1=3]

Q6. Where will you travel for your main holiday in 2009? If more than one place, where will you stay most of the time?

[PRE-CODED, INCLUDING WITHIN THE COUNTRY]

ASK IF [Q1=1]

Q7. In which type of destination did you spend your main holiday in 2009? If more than one destination, where did you stay most of the time?

ASK IF [Q1=2]

Q7. In which type of destination did you – or will you – spend your main holiday in 2009? If more than one destination, where did you – or you will – stay most of the time?

ASK IF [Q1=3]

Q7. In which type of destination will you spend your main holiday in 2009? If more than one destination, where will you stay most of the time?

[READ OUT - ONLY ONE ANSWER]

A traditional, well-known destination 1
 A non-traditional, emerging destination..... 2
 [DK/NA]..... 9

ASK IF [Q1=1]

Q8. Did you book your main holiday via a last-minute offer?

ASK IF [Q1=2]

Q8. Did you – or will you – book your main holiday via a last-minute offer?

ASK IF [Q1=3]

Q8. Will you book your main holiday via a last-minute offer?

Yes 1
 No 2
 [DK/NA]..... 9

ASK IF [Q1=1] AND [Q8=1]

Q9. Why did you do so?

ASK IF [Q1=2] AND [Q8=1]

Q9. Why did you – or will you – do so?

ASK IF [Q1=3] AND [Q8=1]

Q9. Why will you do so?

[READ OUT – UP TO TWO ANSWERS]

Lower price of holiday	1
Late decision about going on holiday.....	2
Late decision about where to go	3
[DK/NA].....	9

ASK IF [Q1=1]

Q10a. When you decided on your main holiday in 2009, which of the following considerations was the most important in your decision for a holiday destination or accommodation?

ASK IF [Q1=2]

Q10a. When you decided on your main holiday in 2009 – or when you will take a decision about your main holiday in 2009 – which of the following considerations was – or will be – the most important in your decision for a holiday destination or accommodation?

ASK IF [Q1=3]

Q10a. When you will take a decision about your main holiday in 2009, which of the following considerations will be the most important in your decision for a holiday destination or accommodation?

[READ OUT - ONLY ONE ANSWER]

Quality of service	1
Price	2
Value for money	3
Cultural attractiveness	4
Eco-friendliness	5
Social considerations (e.g. labour conditions, respect for the host community).....	6
Safety/security	7
Other.....	8
[DK/NA].....	99

ASK IF [Q1=1]

Q10b. And which of these considerations was the second most important?

ASK IF [Q1=2]

Q10b. And which of these considerations was – or will be – the second most important?

ASK IF [Q1=3]

Q10b. And which of these considerations will be the second most important?

[READ OUT - ONLY ONE ANSWER]

Quality of service	1
Price	2
Value for money	3
Cultural attractiveness	4
Eco-friendliness	5

Social considerations (e.g. labour conditions, respect for the host community)	6
Safety/security	7
Other.....	8
[DK/NA].....	99

ASK ALL RESPONDENTS

Q11. Do you consider environmental issues when making decisions about your holidays, such as the facilities provided at the destination or offered by service providers (e.g. accommodation with an eco-label, responsible travel, minimising impact on the local environment)

[READ OUT - ONLY ONE ANSWER]

Yes, environmental considerations already have an impact on my holiday plans	1
Yes, I will consider environmental issues in the future, but I did not consider them yet	2
No, environmental considerations will not impact my holiday plans	3
[I am not aware of the level of environmental protection at my holiday destinations].....	4
[I have no knowledge of this topic].....	5
[I never go on holiday]	6
[DK/NA].....	9

ASK ALL RESPONDENTS

Q12. Will you have the necessary financial resources to be able to afford some type of holiday in 2010?

[READ OUT - ONLY ONE ANSWER]

Yes, without any major difficulties	1
Yes, but I will need to make extra savings	2
No, not without going into debt	3
No, I cannot afford a holiday given the current financial situation.....	4
[I never go on holiday]	5
[DK/NA].....	9

IF [Q12=1, 2 OR 3]

Q13. What kind of holiday are you planning in 2010?

[READ OUT- ONLY ONE ANSWER IS POSSIBLE]

A holiday with more than 13 consecutive nights spent away from home	1
A holiday with more than four consecutive nights away from home.....	2
Short-stay trip(s) (1 - 3 nights) only.....	3
A combination of a long holiday and shorter trips.....	4
No decision yet	5
[I will not go on holiday].....	6
[DK/NA].....	9

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 - ONE ANSWER ONLY]

- Self-employed

- à 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

- à 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

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

- Without a professional activity

- à 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 centre2
 - rural zone / zone with less than 10.000 inhabitants.....3
 - [Refusal].....9