

COMMISSION
OF THE EUROPEAN COMMUNITIES



ΕΥΡΩΠΑΪΚΟ ΟΙΚΟΝΟΜΙΚΟ ΦΕΛΛΕΣΚΑΒ EUROPAISCHE WIRTSCHAFTS-
GEMEINSCHAFT ΕΥΡΩΠΑΪΚΗ ΟΙΚΟΝΟΜΙΚΗ ΚΟΙΝΟΤΗΤΑ EUROPEAN ECO-
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europeans
and
their holidays

This report has been prepared at the request of the Directorate-General for Transport (Tourism) of the Commission of the European Communities.

It is based on a survey carried out on a representative sample of the adult population (aged 15 or over) of the twelve Community countries.

An identical set of questions, about twenty in number, was put, between 19 March and 25 April 1986, to 11,840 individuals who were interviewed personally, in their homes, by trained interviewers (about 1,000 respondents in each country, except Luxembourg, where there were 300, and the United Kingdom, where there were 1,300).

The fieldwork for this survey, organized in parallel with Eurobarometer 25 was carried out by specialist institutes. A list of these institutes and the text of the questionnaire, in French and English, are attached as annexes.

This report has been drawn up by the institute entrusted with coordinating the research (Faits et Opinions in Paris). As is customary with research of this type, the Commission of the European Communities accepts no responsibility for the questions put or the comments contained in the report.

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INTRODUCTION

In most Community countries, statistical surveys are carried out on the pattern of holidaymaking among the population. The study presented here does not claim to rival the data from these national surveys. Its purpose is to afford a Community-wide overview and to provide a basis for comparison of holidaymaking patterns in the various Community countries, since the survey was carried out under strictly identical conditions in all twelve. This is the first time that such a comparative dossier has been produced.

The data gathered cover the whole of the year 1985. Holidaymakers are defined as all people who went away on a holiday trip lasting at least four days at any time during the year. The report is set out in three parts, the main points of which are summarized here.

Part One seeks to determine the numbers and characteristics of those of the overall adult population in Europe who go away on holiday and those who do not.

In fact, it is more correct to think in terms of four groups: two groups of people who do not go away on holiday (those who habitually stay at home and the others) and two groups of holidaymakers (those who take one holiday a year and those who take more). The relative sizes of these four groups vary considerably from one country to another, according to levels of income and even more according to socio-occupational status. Finally, the influence of levels of income, for instance, varies from country to country.

Part Two concentrates exclusively on holidaymakers and seeks to describe the details of their 1985 holidays. It contains a great deal of factual data presented in a manner intended to be helpful to the reader particularly interested in a given nationality, type of holiday or group of holidaymakers (defined by socio-occupational status, for instance).

Two main points emerge from this part of the report:

- First, the holidays of those Europeans who do go away conform very much to a pattern, whatever their nationality, level of income, age or socio-occupational status, and irrespective of whether they work or are retired.

While there are of course differences, all segments of the population display fairly similar proportions of holidaymakers going away in July and August, staying by the seaside, staying at hotels, travelling by car etc. The only really major differences stem from the fact that very few holidaymakers from the southern countries go abroad whereas the vast majority of those from the northern countries cross one or more national frontiers. It can thus be said that, for people living in the Community, there is a European holiday area and that, within this large area, there are relatively uniform patterns of holidaymaking away from home which are not influenced to any great extent by income or status.

- Secondly, almost all the holidaymakers said that they were satisfied or very satisfied with their holidays. Here again, as will be seen in the detailed analyses in the body of the report, there are some interesting differences. The most significant aspect of these differences, in our eyes, lies in the fact that, overall, the highest satisfaction ratings were given by older people and people from the most modest backgrounds, in other words holidaymakers belonging to segments of the population in which only a minority go away on holiday. At the same time, the nationality which gave the lowest ratings are the Dutch, whereas the proportion of people going away on holiday is higher in The Netherlands than in any other country in Europe. It is tempting to draw the conclusion that the likelier it is that going away on

holiday is considered a privilege, the higher the degree of satisfaction, and, conversely, the more commonplace it is to go away on holiday, the lower the degree of satisfaction. This means that there is probably a more or less conscious expectation of new holiday formulas among the most experienced holidaymakers.

Finally, **Part Three** bears on the things that people look for in a holiday. All Europeans are once again included here, whether or not they go away on holiday. The findings point to a strong interest in visiting marvels of nature at a holiday location, a wish to find unspoilt countryside and a complete change of scene, and a concern over the level of prices at holiday locations. Exposure to holiday literature seems to be very widespread.

The main value of this final part of the report lies in the information that it contains on travel between the various Member States: it is now known how many Europeans have visited other Community countries in the past, where they have been, and which countries are considered most attractive by whom.

Once again in order to make reading a large volume of data as easy as possible, the analysis is presented from two viewpoints in turn:

- Each nationality considered as a pool of potential tourists: experience to date of each of the 11 other Community countries, and the numbers who would like to visit or go back to each of them;
- Each country considered as a destination: the numbers who have already visited it, and those who would like to do so; this section is presented in the form of a "data sheet" for each country.

Of all the information gathered on these aspects in the survey, the first point of interest is that two-thirds of all people in the Community have to date visited at least one Member State other than their own. When countries are considered in pairs, appreciable imbalances are often found in travel

between neighbours. To consider some examples of neighbouring countries of similar size and population:

- 30% of Danes have been to The Netherlands, 18% of the Dutch have visited Denmark;
- 40% of the French have been to Italy, 32% of Italians have visited France;
- 49% of Germans have been to France, 39% of the French have visited Germany.

The table on page 80 shows all possible permutations of travel between Member States.

Looking to the future, almost all Europeans show an interest in visiting or revisiting one or more other countries in the Community. The overall findings show that Greece is considered the most attractive country, closely followed by Spain, France and Italy. But all nationalities do not rank countries in the same order from this point of view. For instance, the Irish and Portuguese put The United Kingdom in second place, while the Portuguese and Greeks rate Germany third.

Of course, these findings are not to be looked upon as being in the nature of a league table. The various Member States do not all offer the tourist the same attractions, nor do they all have the same amount. Geographical size, length of coastline and sunshine are important factors, but by no means the only ones. The remarkable finding is that all countries, even the smallest ones, find favour with a proportion of the population.

We trust that the data gathered in this survey will have helped to cast light on affinities and to pinpoint the most promising sources of tourist custom for each country.

PART ONE

THE HABIT OF HOLIDAYING AWAY FROM HOME

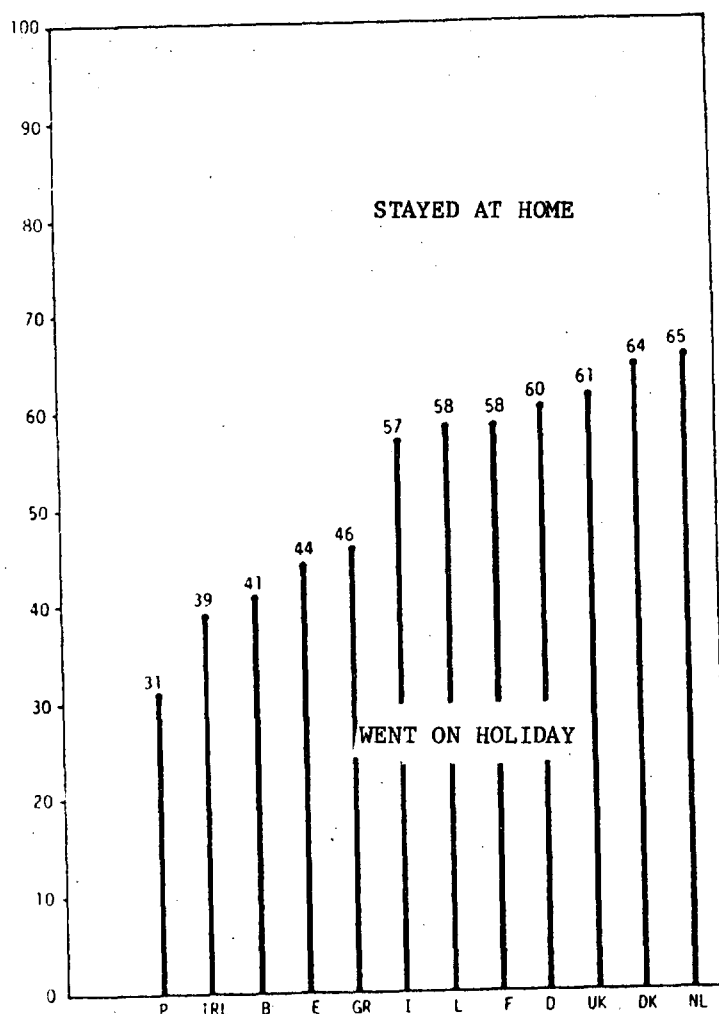
1. THE PROPORTION OF THE POPULATION WHO WENT AWAY ON HOLIDAY IN 1985

Of the 250 million adult Europeans (aged 15 or over), it is estimated that during 1985 some 140 million (making an average of 56% for the 12 Community countries) took at least one holiday away from home lasting four days or more.

The proportion of the population who went away on holiday at some time in 1985 varies considerably from one Community country to another: 65% in The Netherlands and 64% in Denmark, but only 31% in Portugal and 39% in Ireland. Thus, there is a ratio of 1 to 2 between the extremes.

NUMBERS GOING AWAY ON HOLIDAY IN 1985, BY COUNTRY

For every 100 individuals
aged 15 or over



Mention should be made here of the interviewing method used to obtain these results. The survey was carried out in the spring of 1986, and related to the whole of the year 1985. To be absolutely sure that the 11,840 respondents would be able to recollect what they had done throughout 1985 accurately and completely, the interviewers began by showing them a calendar displaying the 12 months of the year and asking them whether they went away on a holiday trip lasting at least four days, and if so in which month or months. It was after this thinking time had been allowed that the following question was asked (1):

Question: "So, altogether you made how many holiday trips, each lasting four days or more in 1985?"

| | All 12 countries (2) | |
|--------------|-----------------------------|------------------------------------|
| None | 43% | |
| One | 37 | } 56% made at least one trip |
| Two | 12 | |
| Three | 4 | |
| Four or more | 3 | |
| No answer | <u>1</u> | |
| Total | 100 | |

It will be noted that of the 56% who did go away on holiday in 1985, a third (19% of the total population) did so more than once. We shall return to this subject in due course.

-
- (1) This interview technique kept omissions to a minimum, and this accounts for the fact that this survey found slightly higher percentages of people who had been away on holiday than those appearing in national surveys published elsewhere.
- (2) All the figures shown in this report under the heading "All 12 countries" are weighted, the replies from each country having been weighted in the European total according to the size of its population as a proportion of the Community population.

There are without doubt many factors which can influence the proportion of the population in each country going away on holiday (for at least four days): the local climate, population density, distance from the sea, the quality of housing, and of course the standard of living. The economic factor is the first that we shall consider here.

Our chosen indicator is the 1985 gross domestic product per head of population based on parity of purchasing power (1). In the graph on page 10, each country's position is shown on the X-axis according to its GDP per head of population and on the Y-axis according to the percentage of the population who holidayed away from home in 1985. The general pattern, as the graph confirms, is for the proportion of people going on holiday to rise in line with the gross domestic product (2). However in some countries the proportion is higher than would be suggested by this economic indicator alone; these are The Netherlands, The United Kingdom, Italy, Denmark and Greece. Conversely, there are other countries where the proportion is lower than might have been expected if the economic indicator were the only influential factor; these are Portugal, Ireland, Spain, Luxembourg and above all Belgium.

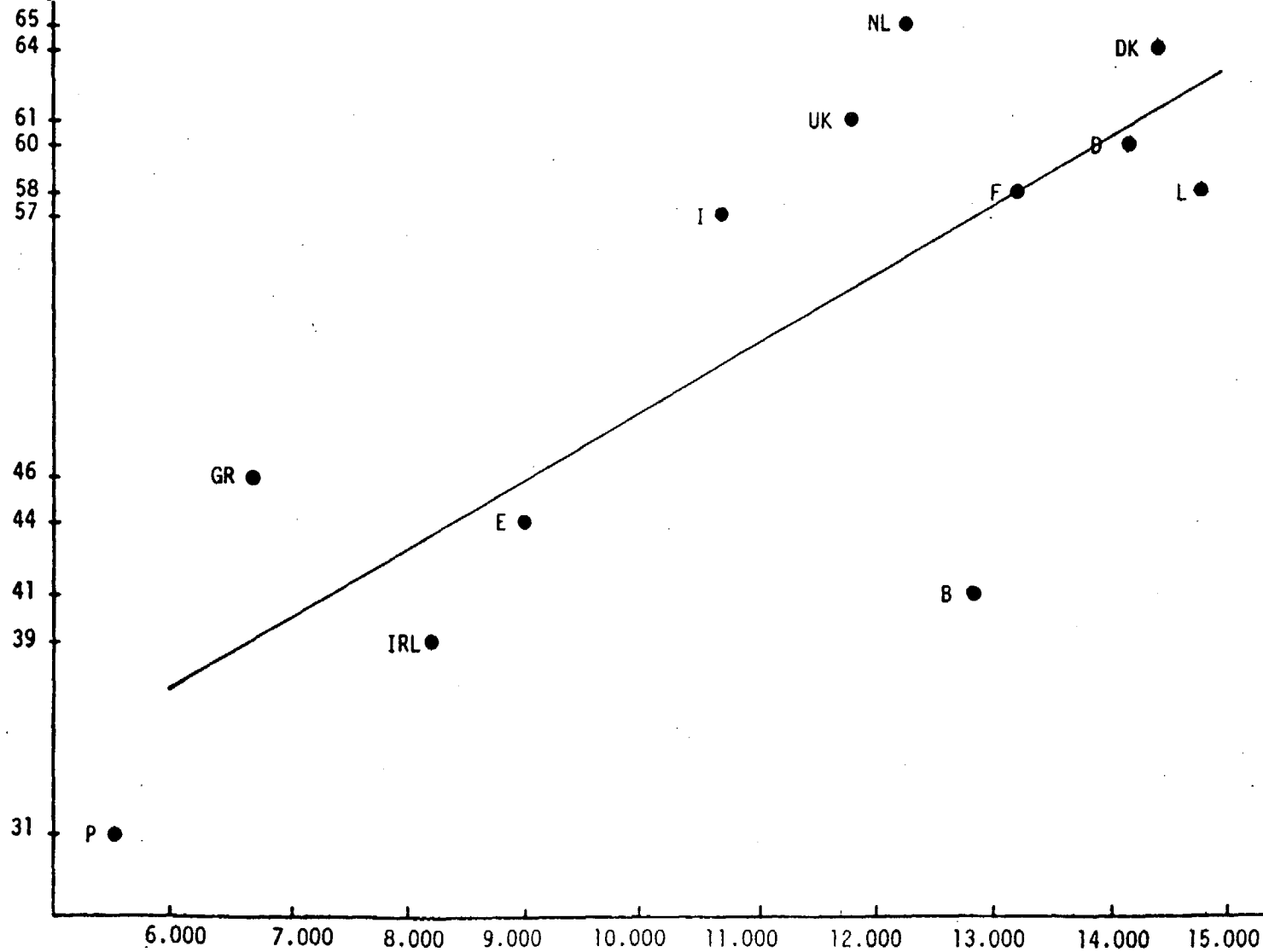
The most surprising case is Belgium, a country which is not only in northern Europe but also enjoys a high standard of living, and yet the percentage of the population going away on holiday in 1985 was among the lowest in the Community.

(1) Source: Eurostat.

(2) The correlation coefficient is 0.77.

PERCENTAGES OF NATIONAL POPULATIONS HOLIDAYING AWAY FROM HOME IN 1985,
correlated with GDP

% who went on
holiday in 1985



1985 GDP per capita
based on parity of
purchasing power in
ECUs

2. REASONS GIVEN BY THOSE WHO DID NOT GO AWAY IN 1985

Approximately 110 million adult Europeans did not go away on holiday during 1985, and the main reason given for this (by 44% of those who stayed at home) was the economic one. But about a fifth of those who did not go away (22%) said that they preferred to stay at home. Others mentioned reasons connected with work (16%) or family reasons arising exceptionally in 1985: poor health, moving house or some chance circumstance.

Worry about terrorists, i.e. insecurity, was apparently a negligible factor in the decision not to go away on holiday; barely one respondent in a hundred gave this reason for staying at home in 1985.

Question: (Put to those who had not gone away on holiday) "Why didn't you go away in 1985?" (The interviewer showed the list of possible answers)

| | Of 100 people who did not go away in 1985 |
|---|--|
| You preferred to stay at home | 22 |
| You were not able to get away from work | 16 |
| You couldn't afford it | 44 |
| Special reasons (your health, moving house, family reasons etc.) | 22 |
| Worry about safety, terrorists etc. | 1 |
| Other reasons | 6 |
| Not stated | 4 |
| Total | (1) |

Denmark, Belgium and Italy are the countries where the largest proportions of those who did not go away said that they preferred to stay at home, Portugal, Ireland and Greece those where lack of finance was mentioned most often (see cable overleaf giving a country-by-country breakdown of the answers to this question).

(1) Multiple answers bring the total to more than 100.

REASONS FOR NOT GOING AWAY ON HOLIDAY

QUESTION (Put to those who did not go away in 1985):

Why didn't you go away in 1985?

- (a) You preferred to stay at home
- (b) You were not able to get away from work
- (c) You couldn't afford it
- (d) Special reasons (your health, moving house, family reasons etc.)
- (e) Worry about safety, terrorists etc.
- (f) Other reasons

| | (a) | (b) | (c) | (d) | (e) | (f) | TOTAL |
|----------------|-----|-----|-----|-----|-----|-----|-------|
| BELGIQUE | 32% | 7% | 40% | 14% | * | 4% | (1) |
| DANMARK | 38 | 8 | 23 | 16 | * | 16 | (1) |
| DEUTSCHLAND | 27 | 12 | 41 | 29 | 1 | 3 | (1) |
| ELLAS | 12 | 24 | 55 | 35 | * | - | (1) |
| ESPANA | 14 | 22 | 50 | 15 | * | 9 | (1) |
| FRANCE | 22 | 23 | 44 | 25 | 1 | 2 | (1) |
| IRELAND | 14 | 10 | 61 | 10 | 1 | 6 | (1) |
| ITALIA | 30 | 22 | 31 | 21 | 2 | 2 | (1) |
| LUXEMBOURG | 23 | 16 | 20 | 31 | * | 10 | (1) |
| NEDERLAND | 22 | 9 | 32 | 27 | 1 | 14 | (1) |
| PORTUGAL | 12 | 19 | 67 | 14 | 1 | 2 | (1) |
| UNITED KINGDOM | 14 | 6 | 50 | 21 | 1 | 16 | (1) |
| EC 12 | 22 | 16 | 44 | 22 | 1 | 6 | (1) |

N.B. All the percentages are calculated on the basis of 100 people from each country who did not go away on holiday in 1985.

(*) Less than 0.5%.

(1) With some respondents giving more than one answer, the total for each country generally exceeds 100.

3. CLOSER ANALYSIS OF THOSE WHO DID AND THOSE WHO DID NOT GO AWAY ON HOLIDAY

Let us now try to look beyond the details briefly presented above of the split between those who went away on holiday in 1985 and those who did not, which provided the basis for an estimate of the relative sizes of the two groups.

All those who stayed at home during 1985 were asked what they had done in 1984 and what they intended or expected to do in 1986 (1).

As already stated, those who did go away in 1985 were asked whether they did so once or more often.

With these data it is possible to divide the European population into four groups, giving a finer analysis of the situation.

Two groups of those who did not go away

Those who did not go away in 1985 divide into two groups: those who did not go away in 1984 either and did not intend to go away in 1986 (we refer to them as those who habitually stay at home), and the others, those who had been away in 1984 and/or intended to go away in 1986.

Of the adult population of the Community as a whole, half of those who did not go away in 1985 fall into the category of those who habitually stay at home, and their number can be estimated at about 53 million.

(1) The questions asked were "And the previous year (1984), did you go away on holiday at least once for four days or more?" (Answers: yes 26%, no 74%) and "And during the next 12 months, do you think you will take a holiday trip of at least four days?" (Answers: yes 25%, no 56%, don't know 19%).

Two groups of those who did go away

The Europeans who went away on holiday during 1985 can also be divided into two groups: those who did so only once (the majority) and those who did so more often.

To summarize, the situation for the Community as a whole breaks down as follows:

| | All 12 countries | | Of 254 million adults |
|---|---------------------|-------|--------------------------|
| X who did not go away on holiday in 1985, of whom: | | | |
| habitually stay at home | 21 | } 44% | 53,300,000 |
| others | 23 | | 58,400,000 |
| X who went away on holiday in 1985, of whom: | | | |
| once | 37 | } 56% | 94,000,000 |
| more than once | 19 | | 48,300,000 |
| | 100 | | <u>254,000,000</u> |

4. NATIONAL DIFFERENCES

The general hierarchy of the 12 Community countries shown on page 7 can now be refined, as illustrated in the diagram overleaf.

As this diagram clearly shows, the greatest differences from one country to another are to be found in the two extreme groups: those who habitually stay at home (16% in The Netherlands, 49% in Portugal) and those who go away more than once (7% in Portugal, 27% in France).

By contrast, those who stayed at home in 1985 for some reason other than habit consistently represent about 20% to 25% of the population, whatever the country. This probably accounts for the trend observed over the years towards a levelling-off in the numbers taking holidays away from home in those countries where the proportion of those who do so is already very high.

More generally, it can be seen that the Community comprises:

- Seven countries where the majority of the population go away on holiday, many of them more than once, while the group of those who habitually stay at home is not large (less than 25%); these are The Netherlands, Denmark, The United Kingdom, Germany, France, Luxembourg and Italy;
- Five countries where only a minority go away on holiday, rarely more than once, and where the majority of those who do not go away on holiday habitually stay at home; these are Greece, Spain, Belgium, Ireland and Portugal. (See diagram overleaf.)

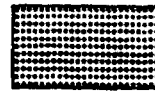
Of all Community nationalities, the French have the largest group of people who go away more than once (27%), something which is doubtless attributable in large measure to their statutory five weeks of holidays.

STAYED AT HOME IN 1985

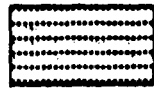
WENT AWAY IN 1985



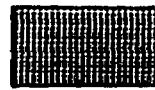
HABITUALLY STAY AT HOME



ONCE



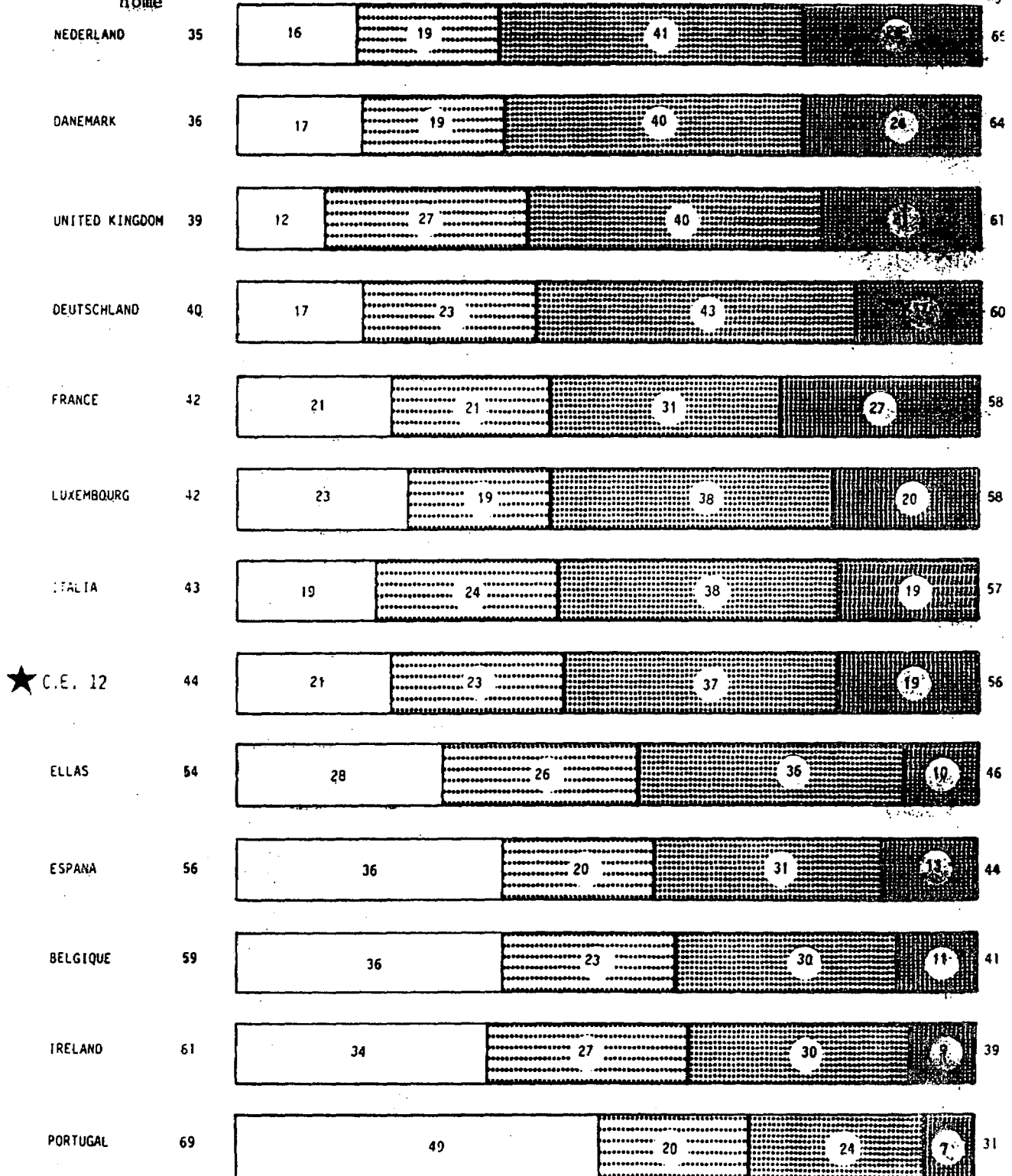
OTHERS



MORE THAN ONCE

Total who stayed at home

Total who went away



5. THE INFLUENCE OF SOCIODEMOGRAPHIC VARIABLES

The numbers going away on holiday are influenced by other variables as well as nationality: age, the presence of children in the household, the type of location in which people live, the head of household's occupation, family income.

Young people (aged 15 to 24) are far from all having gone away on holiday in 1985 (only 62%), while 47% of those aged 50 or over went away. In fact, the greatest difference between age groups is found in the proportion of those who habitually stay at home, which is small among the youngest and rises to 1 in 3 among the oldest.

The presence of children in the household is not a major factor influencing the numbers going away on holiday, except that holidays away from home are less common among large families (with three or more children).

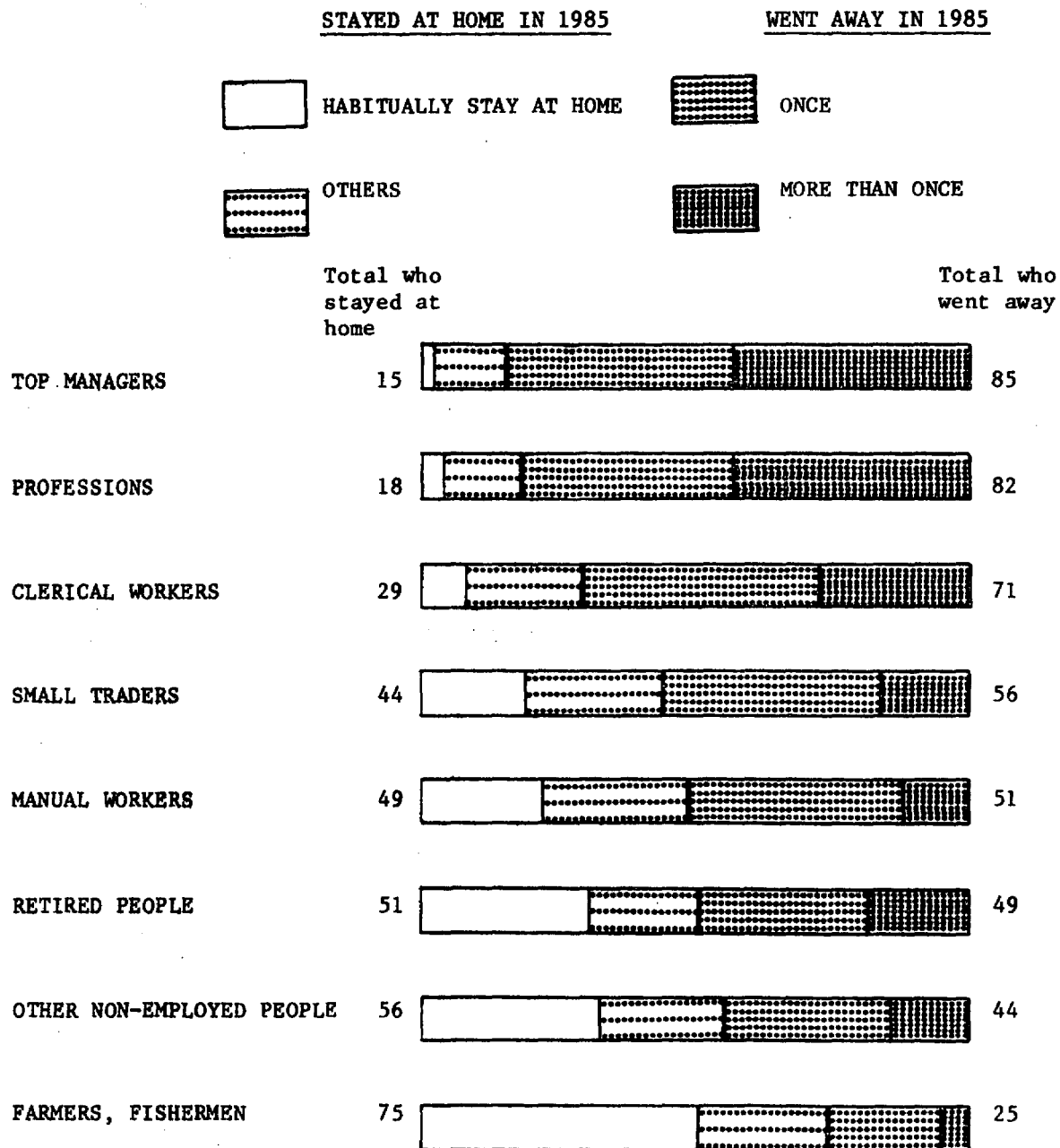
Differences of behaviour are found according to the type of locality and the type of housing in which people live; these were not unexpected, but they can now be quantified: 66% of people living in large towns went away on holiday in 1985; 45% of people living in villages did so. (It should be noted in passing that only a minority of village-dwellers are farmers.) The proportions of people going away on holiday are slightly higher among those living in blocks of flats than among those living in houses, but the differences are not substantial.

The level of family income has a greater influence on holidaymaking patterns than any of the variables mentioned above: 75% of families in the top income group went away in 1985, compared with only 36% in the bottom group (1).

(See the table on page 19 for a detailed breakdown.)

(1) All respondents in European surveys answer a question on the level of their family income; they are then classified in four groups or quartiles according to whether, in relation to the national average in their country, they belong to the upper quartile (R ++), the second quartile (R +), the third quartile (R -) or the fourth quartile (R --).

Finally, by far the most influential variable is the head of household's occupation. It reflects not only both economic and cultural differences but occupational constraints as well. In 1985, 85% of the families of top managers and 82% of those of members of the professions went away on holiday (and half of these did so more than once), whereas only 25% of farmers' families did so. (See diagram below.)



THE PATTERN OF HOLIDAYMAKING IN 1985,

by segment of the population

| | STAYED AT HOME IN 1985 | | | WENT AWAY IN 1985 | | TOTAL who went away |
|--|--------------------------------|-------------------------------|--------|-------------------|----------------------|------------------------|
| | TOTAL who stayed at home | Habitually stay at home | Others | Once | More than once | |
| EC 12 | 44 | 21 | 23 | 37 | 19 | 56 |
| BY AGE | | | | | | |
| 15-24 | 38 | 11 | 27 | 41 | 21 | 62 |
| 25-39 | 38 | 14 | 24 | 41 | 21 | 62 |
| 40-55 | 47 | 24 | 23 | 37 | 16 | 53 |
| 55+ | 53 | 33 | 20 | 30 | 17 | 47 |
| BY FAMILY INCOME | | | | | | |
| High R++ | 25 | 7 | 18 | 43 | 32 | 75 |
| R+ | 40 | 15 | 25 | 39 | 21 | 60 |
| R- | 51 | 27 | 24 | 37 | 12 | 49 |
| Low R-- | 64 | 41 | 23 | 27 | 9 | 36 |
| BY HEAD OF HOUSEHOLD'S OCCUPATION | | | | | | |
| Top managers | 15 | 2 | 13 | 42 | 43 | 85 |
| Professions | 18 | 4 | 14 | 39 | 43 | 82 |
| Clerical workers | 29 | 8 | 21 | 44 | 27 | 71 |
| Small traders | 44 | 19 | 25 | 40 | 16 | 56 |
| Manual workers | 49 | 22 | 27 | 39 | 12 | 51 |
| Retired people | 51 | 31 | 20 | 31 | 18 | 49 |
| Other non-employed people | 56 | 33 | 23 | 30 | 14 | 44 |
| Farmers, fishermen | 75 | 51 | 24 | 20 | 5 | 25 |
| BY NUMBER OF CHILDREN UNDER 15 IN THE HOUSEHOLD | | | | | | |
| None | 44 | 23 | 21 | 37 | 19 | 56 |
| One | 44 | 18 | 26 | 38 | 18 | 56 |
| Two | 40 | 15 | 25 | 41 | 19 | 60 |
| Three or more | 56 | 28 | 28 | 30 | 14 | 44 |
| BY HOME LOCALITY | | | | | | |
| Large town | 34 | 15 | 19 | 42 | 24 | 66 |
| Small town | 41 | 18 | 23 | 38 | 21 | 59 |
| Village | 55 | 30 | 25 | 32 | 13 | 45 |
| BY TYPE OF HOUSING | | | | | | |
| A flat in | | | | | | |
| a large block | 34 | 12 | 22 | 39 | 27 | 66 |
| a medium-sized block | 35 | 15 | 20 | 44 | 21 | 65 |
| a small block | 40 | 18 | 22 | 38 | 22 | 60 |
| Semi or terraced house | 47 | 22 | 25 | 37 | 16 | 53 |
| Detached house | 46 | 23 | 23 | 35 | 19 | 54 |
| Farm or other house in the country | 62 | 41 | 21 | 29 | 9 | 38 |

The table on page 19 illustrates the influence of sociodemographic variables in the Community as a whole. The general pattern is repeated in all the countries, except on two aspects, the influence of age and the influence of the level of family income on numbers going away on holiday, which both vary a great deal from one country to another (1).

The influence of age, by country

In some countries the proportion of people going away on holiday varies very little according to age. This is particularly true of The United Kingdom and Germany, where almost as high a proportion of those aged 55 and over as of young people went away on holiday in 1985.

By contrast, in other countries, especially Greece, Spain and Portugal, the proportion of those in the upper age group going away is very much lower. These are the countries where there is the greatest likelihood of an appreciable increase in holidaymaking away from home over the years ahead. The graphs on page 21 show the proportions for each of the four age groups (15 to 24, 25 to 39, 40 to 54, 55 or over) in each country.

The influence of the level of family income, by country

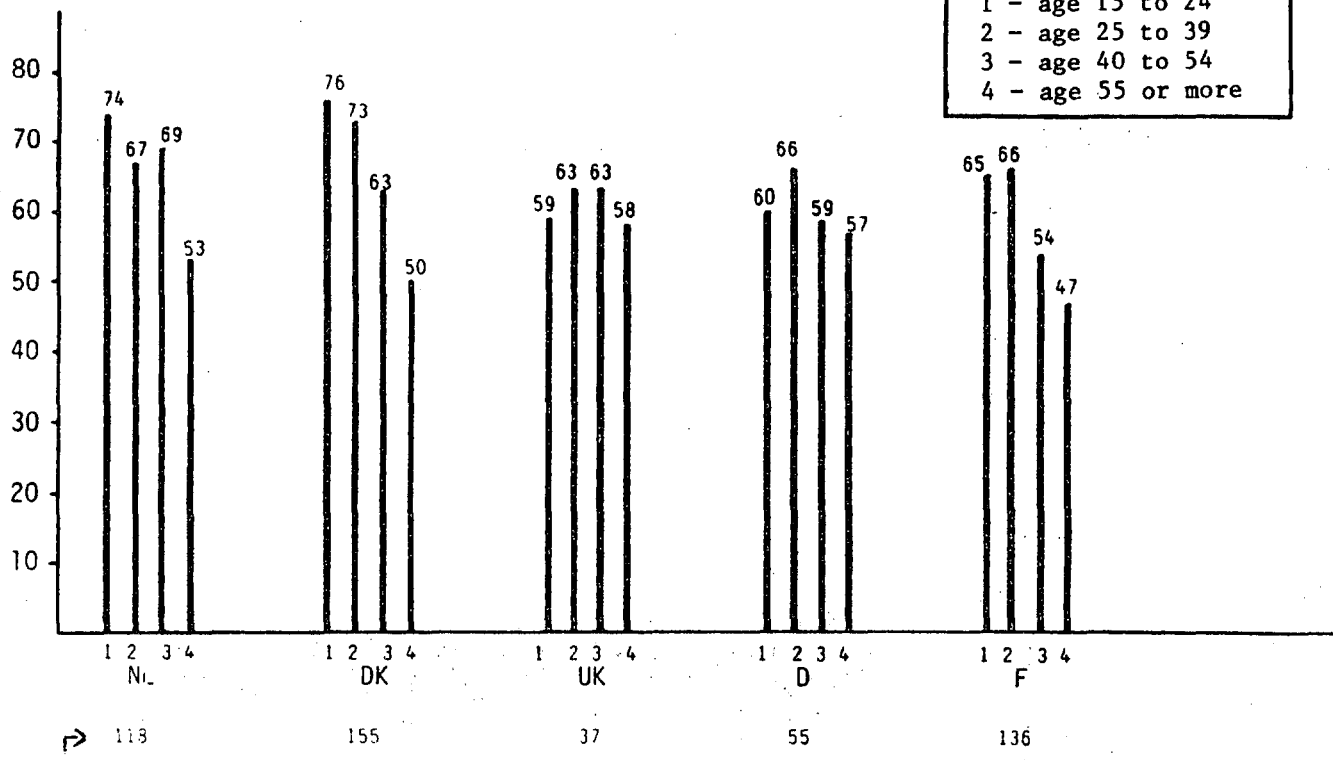
The finding that a much higher proportion of people in the upper income bracket than of those from low-income families went away on holiday was common to all the countries. This was only to be expected, but the difference attributable to this factor varies very widely from country to country. The ratio is 4:1 in Portugal and Spain, only 2:1 in Denmark, The Netherlands, The United Kingdom, Luxembourg and Italy. The graphs on page 22 show, for each country, the proportion of people from each of two groups who went away on holiday in 1985: the most affluent (upper income quartile R ++) and the least affluent (lower income quartile R --) (1).

(1) The spread in answers from each country according to a given variable (age, level of income etc.) has been calculated according to Pearson's variation coefficient: standard deviation divided by the average and multiplied by 100. The higher the coefficient, the greater the influence of the variable in the country concerned.

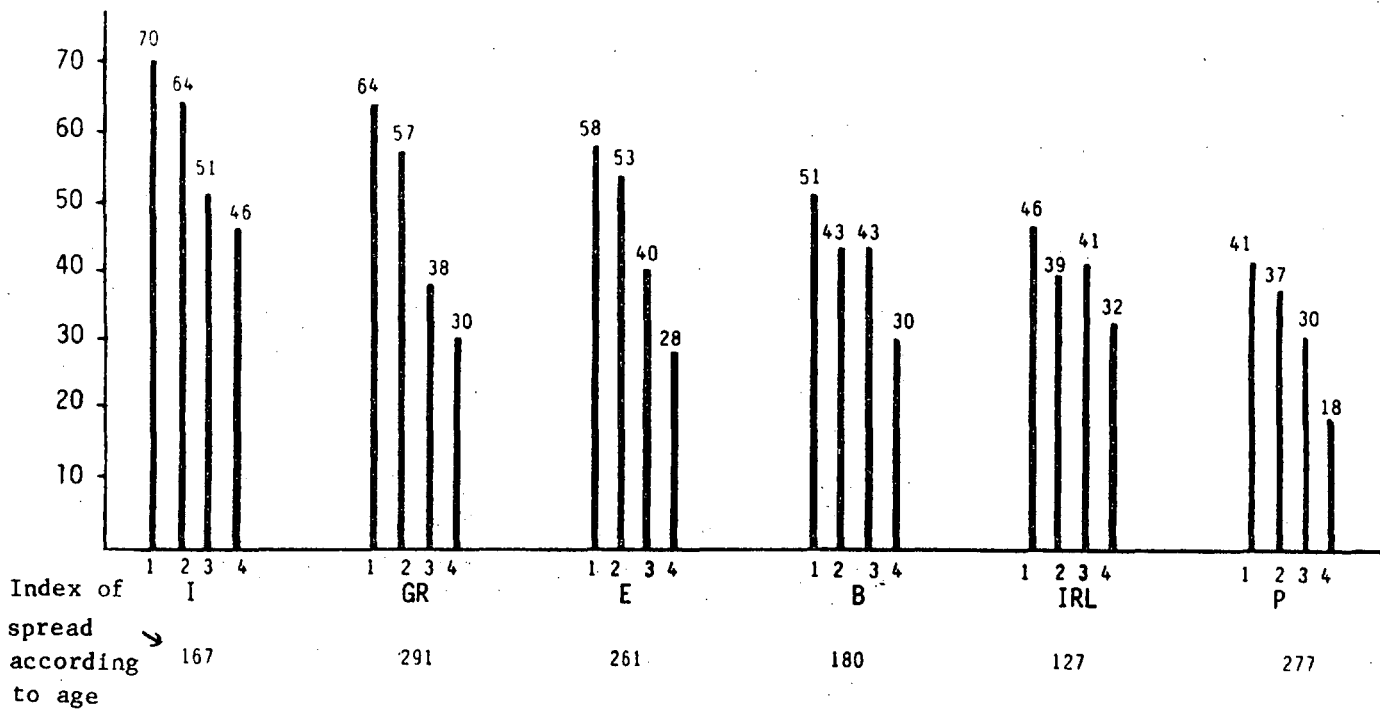
PROPORTIONS OF THE VARIOUS AGE GROUPS GOING AWAY ON HOLIDAY,
BY COUNTRY

% of each age group

In each graph:
1 - age 15 to 24
2 - age 25 to 39
3 - age 40 to 54
4 - age 55 or more



Index of spread according to age

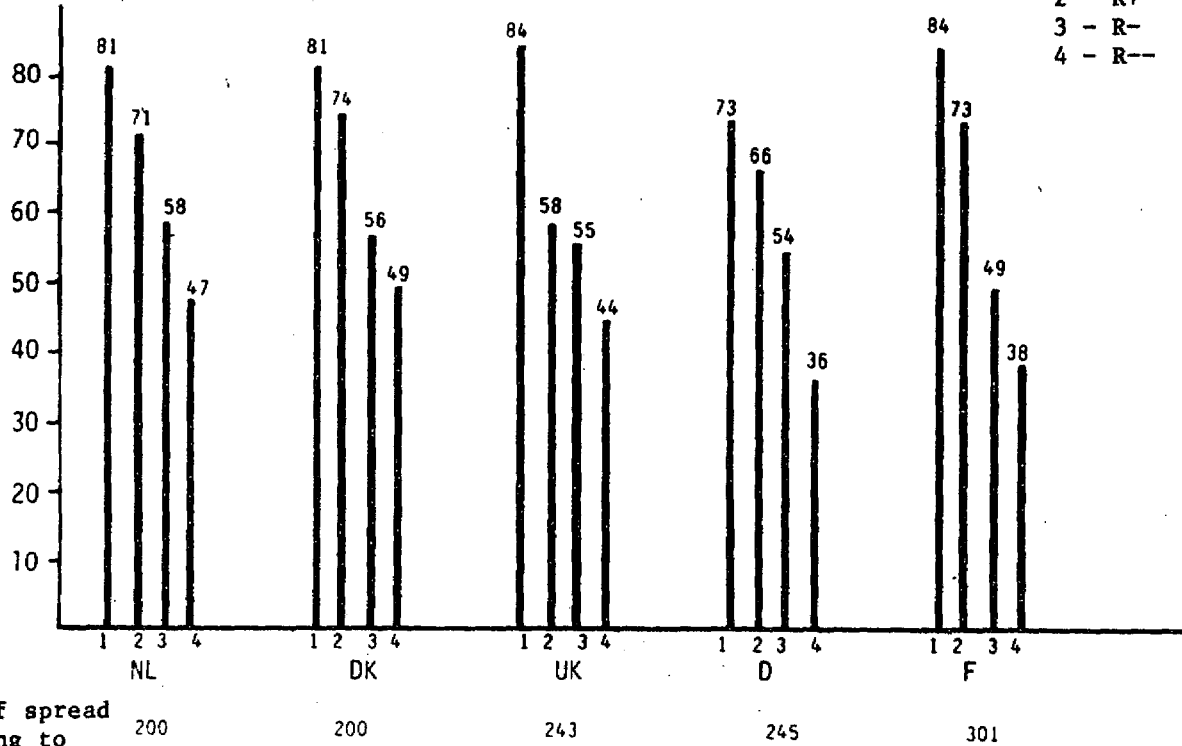


N.B. The index presented here is Pearson's variation coefficient (standard deviation divided by the national average and multiplied by 1000).

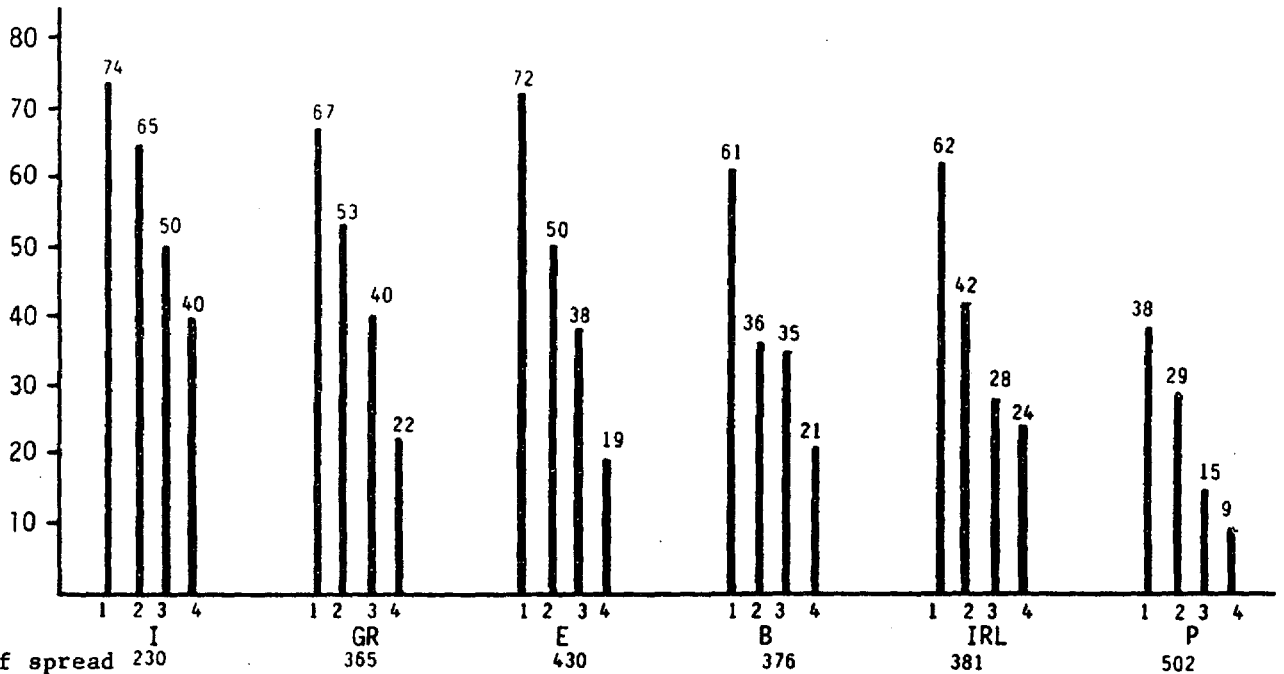
PROPORTIONS OF THE VARIOUS INCOME GROUPS GOING AWAY ON HOLIDAY,
BY COUNTRY

% of each
income group

In each graph:
1 - R++
2 - R+
3 - R-
4 - R--



Index of spread
according to
income



Index of spread
according to
income

N.B. The index presented here is Pearson's variation coefficient (standard deviation divided by the national average and multiplied by 1000).

6. THE TIMING OF HOLIDAYS AWAY FROM HOME (NO DISTINCTION BETWEEN MAIN AND OTHER HOLIDAYS)

It goes without saying that the main holiday migrations take place in July and August. A detailed study is made later in this report of the degree to which holidays are concentrated at certain times of the year, according to the type of holiday and the type of holidaymaker. But it will be of interest at this stage to see what **proportion of the total adult population in Europe** is away on holiday for at least four days in any given month of the year. This calculation includes both main and other holidays, irrespective of the length of stay away from home beyond four days.

Let us first look at the averages for Europe as a whole. In July, 18% of Europeans (about 45 million out of a total of 254 million) go away on holiday. The figure for August is 23% (about 58 million). It drops to only 8% in June and again in September (about 20 million in each of these months).

The graph on page 24 gives the figures for each month of 1985 (European averages).

The figures for some countries deviate very appreciably from the average. For instance, 38% of Danes and 33% of the Dutch go away in July. The highest figures for August are in Italy (33%) and France (29%).

Turning to the less popular months, 13% of the British go away in June and 12% in September.

In the winter months, it is the French who go away in largest numbers (8% in February and 8% in December).

To repeat, **these figures are percentages of the adult population in each country and include all holiday trips lasting four days or more.**

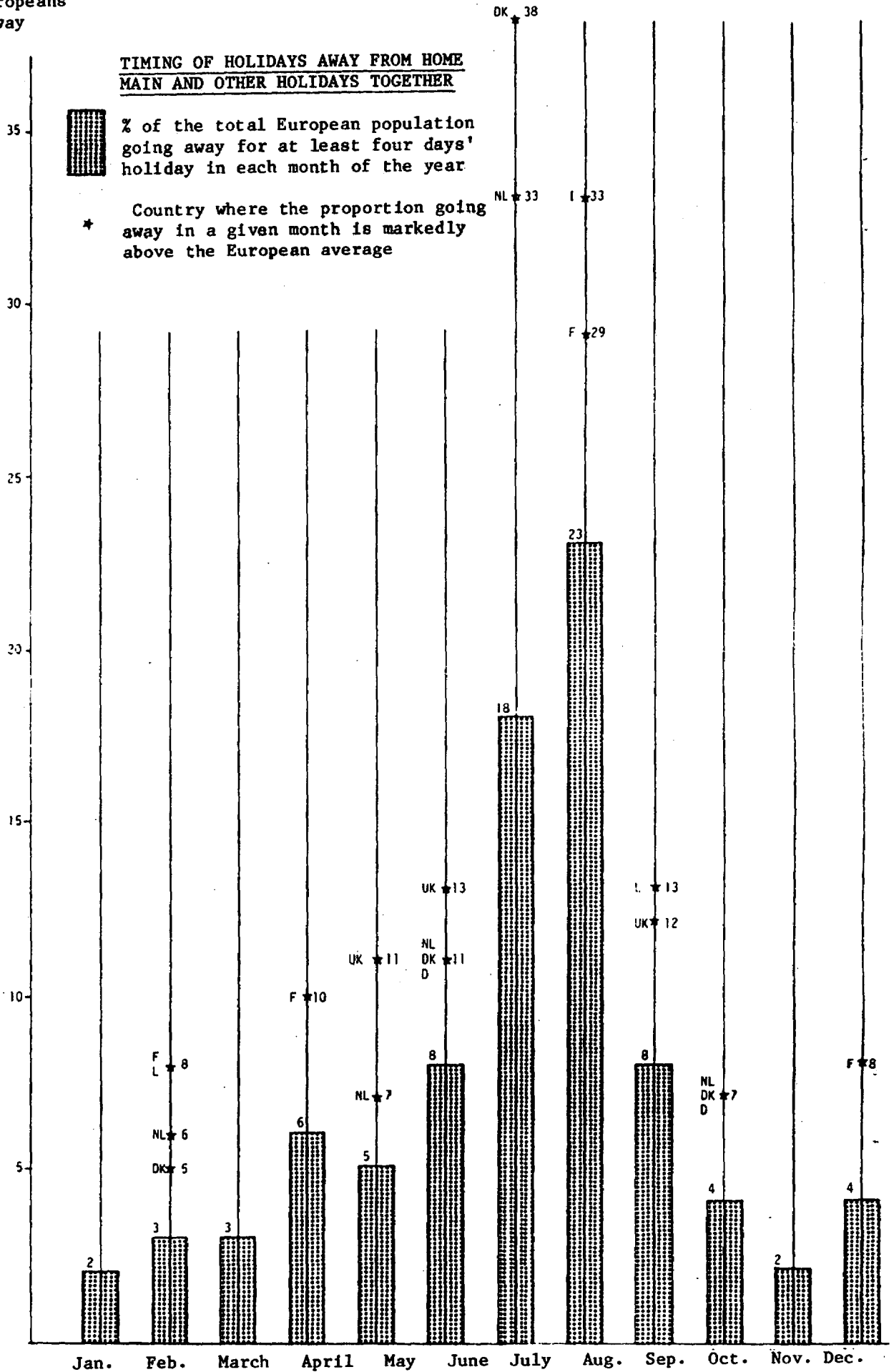
% of Europeans going away

TIMING OF HOLIDAYS AWAY FROM HOME
MAIN AND OTHER HOLIDAYS TOGETHER



% of the total European population going away for at least four days' holiday in each month of the year

* Country where the proportion going away in a given month is markedly above the European average



P A R T T W O

DESCRIPTION OF 1985 HOLIDAYS

This part is concerned only with those people who took holidays away from home in 1985 (56% of all adult Europeans, a total of some 140 million). A breakdown by nationality is given below.

| COUNTRY | ADULT POPULATION (AGED 15+) | PROPORTION TAKING AT LEAST ONE HOLIDAY TRIP | i.e. IN TOTAL (APPROX) |
|----------------|--------------------------------|---|---------------------------|
| BELGIQUE | 7,924,000 | 41% | 3,200,000 |
| DANMARK | 4,133,000 | 64% | 2,600,000 |
| DEUTSCHLAND | 51,466,000 | 60% | 30,800,000 |
| ELLAS | 7,715,000 | 46% | 3,500,000 |
| ESPANA | 28,854,000 | 44% | 12,700,000 |
| FRANCE | 42,851,000 | 58% | 24,800,000 |
| IRELAND | 2,455,000 | 39% | 900,000 |
| ITALIA | 44,438,000 | 57% | 25,300,000 |
| LUXEMBOURG | 300,000 | 58% | 200,000 |
| NEDERLAND | 11,400,000 | 65% | 7,000,000 |
| PORTUGAL | 7,314,000 | 31% | 2,200,000 |
| UNITED KINGDOM | 45,207,000 | 61% | <u>27,500,000</u> |
| | | | 140,700,000 |

1. THE GENERAL PATTERN OF EUROPEAN HOLIDAYMAKING

The first point to note is that 140 million Europeans took at least one holiday away from home during 1985, and 48 million of these took two or more.

All the respondents in the survey who had been away for at least 4 day answered a series of questions on the details of their holidays. Those who had been away more than once were asked to describe their main holiday first and then another holiday trip made during the same year, the choice being left to them (1).

The details on the following pages are divided between "main holidays" (details given by all respondents who went away on holiday, whether only once or more often) and "other holidays" (details of a trip made by those who went away more than once).

Major differences are found between main holidays and other holidays on three points: duration, the time of the year, and the type of holiday destination. By contrast, all the other data gathered showed strong similarities between the two types of holiday: they were taken by family groups (three or more people together in the most common case); they were taken in one place for the most part; they were taken in the respondents' own country (in two-thirds of cases); and the car was used to reach the destination (in two-thirds of cases).

Finally, the level of respondents' satisfaction with their holidays was very high: on a scale of 1 to 10, barely 10% gave a rating less than six, while over 40% gave nine or ten, indicating almost complete or complete satisfaction.

Before analysing this information in detail, let us examine the replies to the questionnaire (consolidated table of results from all twelve countries).

(1) We thus have "case histories" of 6,593 main holidays and 2,230 other holidays.

COMPARATIVE DETAILS OF MAIN HOLIDAYS AND OTHER HOLIDAYS

| | All 12 countries | |
|---|------------------|-----------------|
| | Main holiday % | Other holiday % |
| "It started in which month?" | | |
| January, February, March | 4 | 17 |
| April, May | 8 | 20 |
| June | 11 | 7 |
| July | 28 | 8 |
| August | 34 | 13 |
| September | 9 | 11 |
| October, November, December | 6 | 20 |
| Not stated | - | 4 |
| | 100 | 100 |
| "How many days away from home in total?" | | |
| Four to nine days | 24 | 62 |
| Ten to nineteen days | 42 | 27 |
| Twenty to twenty-nine days | 19 | 4 |
| Thirty days or more | 14 | 3 |
| Not stated | 1 | 4 |
| | 100 | 100 |
| Average length of holiday | 17 days | 10 days |
| "How many people were you on this holiday (including children)?" | | |
| One person only | 11 | 16 |
| Two | 33 | 32 |
| Three | 16 | 13 |
| Four | 21 | 18 |
| Five or more | 18 | 18 |
| Not stated | 1 | 3 |
| | 100 | 100 |

| | | All 12 countries | |
|--|--------------------------|------------------|-----------------|
| | | Main holiday % | Other holiday % |
| "Where did you go?" | | | |
| In your country | | 67 | 72 |
| In another country in the EEC |] Total abroad 33% | 20 | 13 |
| Somewhere else in Europe | | 10 | 9 |
| Outside Europe (America, Asia, Africa etc.) | | 3 | 3 |
| Not stated | | - | 3 |
| | | 100 | 100 |
| "Was it ..." | | | |
| In the countryside | | 25 | 28 |
| In the mountains | | 23 | 24 |
| In a town or towns | | 19 | 25 |
| By the seaside | | 52 | 29 |
| Not stated | | <u>1</u> | <u>4</u> |
| | | (1) | (1) |
| "Did you stay in one place or did you go to several places?" | | | |
| Same place | | 73 | 74 |
| Several places | | 26 | 22 |
| Not stated | | <u>1</u> | <u>4</u> |
| | | 100 | 100 |
| "What method of transport did you use?" | | | |
| Car | | 68 | 67 |
| Train | | 14 | 14 |
| Plane | | 13 | 8 |
| Boat | | 5 | 4 |
| Bicycle/motorbike | | 1 | 1 |
| Other (coach) | | <u>10</u> | <u>11</u> |
| | | (1) | (1) |

(1) Multiple answers bring the total to more than 100.

| All 12 countries | | |
|---|----------------|-----------------|
| | Main holiday % | Other holiday % |
| "What sort of accommodation did you stay in?" | | |
| Hotel/boarding house/motel | 32 | 28 |
| Rented villa/bungalow/chalet etc. | 17 | 12 |
| Own weekend home or holiday cottage etc. | 7 | 7 |
| Staying with relations or friends | 21 | 31 |
| Stayed as paying guests in private house | 5 | 4 |
| Camping/caravaning | 16 | 12 |
| Holiday village | 2 | 1 |
| Youth hostel | 1 | 1 |
| Boat/cruise | 1 | 1 |
| Other | <u>2</u> | <u>3</u> |
| | (1) | (1) |
| "How did you book this holiday?" | | |
| Through a travel agency as a package tour or organized trip | 13 | 9 |
| Through a travel agency for travel arrangements only | 4 | 4 |
| Through a club or association you belong to | 4 | 7 |
| By yourself or by the family without using a travel agency | 75 | 76 |
| Not stated | <u>4</u> | <u>4</u> |
| | 100 | 100 |
| "If you had to give a rating from 1 to 10 to indicate how pleased you were with this holiday, what number would you say?" | | |
| 1 or 2 | 2 | 1 |
| 3 or 4 | 2 | 2 |
| 5 | 6 | 5 |
| 6 | 5 | 6 |
| 7 | 13 | 13 |
| 8 | 23 | 20 |
| 9 | 14 | 15 |
| 10 | 27 | 26 |
| Not stated | <u>8</u> | <u>12</u> |
| | 100 | 100 |
| Average rating out of 10: | 8.17 | 8.28 |

(1) Multiple answers bring the total to more than 100.

2. THE TIMING OF MAIN AND OTHER HOLIDAYS

Having just given general information on the times of year at which holidaymakers go away we now make a more detailed examination of how these times vary according to the type of holiday or holidaymaker.

Main holidays and other holidays

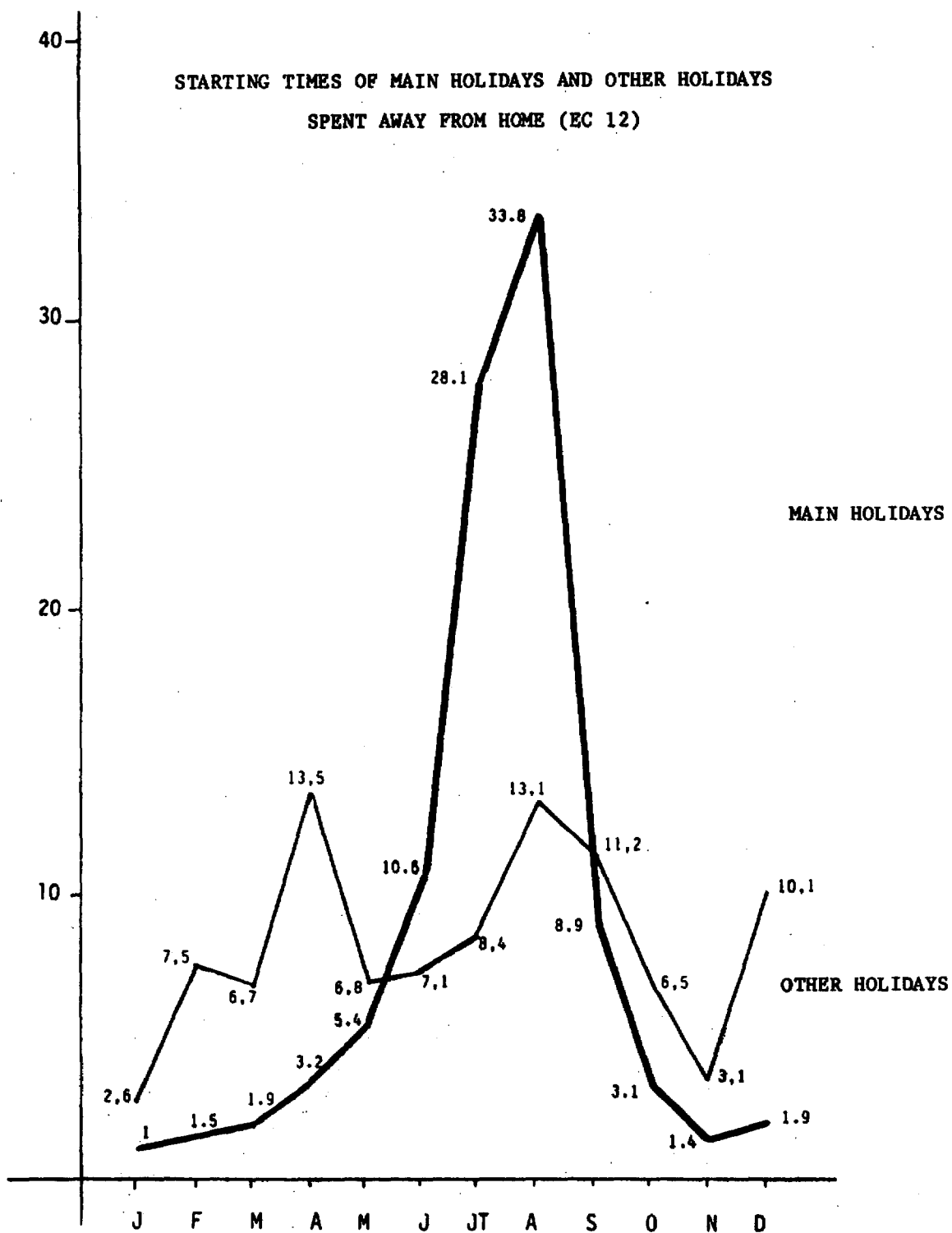
Main holidays prove to be very heavily concentrated on the months of July and August: the starting date for two out of three European holidaymakers is in either of these two months. About a tenth go away in June, and a slightly smaller proportion in September. The other 20% or so choose one of the remaining eight months in the year; January, February and November are the slackest months.

Other holidays are much more evenly spread through the year. The most popular months for going away are April, August, September and December, but there are still those who favour other times of the year and the only really "dead" months are January and November.

In other words, the predominant pattern is for Europeans to take their main holiday (or their one annual holiday) in July and/or August. Clearly, various contributory factors are at work to underpin this pattern: the climate, the school year, the dates of company holidays, and perhaps also customary practice in the hotel industry.

However, other holidays are more evenly spread throughout the year; the numbers of people taking them are smaller, the factors prompting them to take them are more varied, and periods spent away from home are shorter.

The graph overleaf shows the distribution through the year of the starting times of main holidays and other holidays respectively.



The curves indicate the distribution through the year of starting times per 100 people holidaying away from home.

We now concentrate exclusively on the timing of main holidays (1).

Breakdown by nationality

It is in the United Kingdom, Germany and Luxembourg that holidays are staggered to the greatest extent (only about 1 in 2 of these nationalities go away in July or August). By contrast, upwards of 8 out of 10 Italians and Belgians leave in July or August, with the Italians showing a marked preference for August (49%). In Denmark, there is massive concentration on July (52%).

Breakdown by type of holiday location

Whether holidays are spent at locations by the sea, in the mountains or elsewhere (towns, countryside, tours), departure times remain heavily concentrated on the months of July and August, the extreme case being holidays by the sea (31% in July, 37% in August).

Breakdown by destination

The concentration of starting dates is at its greatest in the case of people who spend their holidays in their own country; it eases slightly with those who go further afield, to another Community country or elsewhere in Europe. But the only significantly greater spread is found in the case of main holidays spent outside Europe.

The figures on which the three paragraphs above are based are shown in the table on page 34.

Package holidays

Package holidays are also much more evenly spread through the year than holidays that people organize for themselves. It should be added that most packages are for holidays abroad (and 9% are outside Europe). Package holidays are analysed on page 45.

(1) For "other holidays", the table on page 35 provides a breakdown of starting times according to nationality, for those countries where people in sufficient numbers take more than one holiday.

STARTING TIMES OF MAIN HOLIDAYS

QUESTION: In which month did your main holiday start?

| MONTH: | J | F | M | A | M | J | JY | A | S | O | N | D | TOTAL |
|----------------------------|---|---|---|---|----|----|----|----|----|---|---|---|-------|
| BY NATIONALITY | | | | | | | | | | | | | |
| BELGIQUE | 2 | - | 1 | 2 | 7 | 6 | 40 | 33 | 4 | 3 | 1 | 1 | 100 |
| DANMARK | 1 | 3 | 1 | 4 | 6 | 14 | 52 | 11 | 4 | 3 | - | 1 | 100 |
| DEUTSCHLAND | 1 | 1 | 2 | 5 | 8 | 14 | 26 | 26 | 10 | 5 | - | 2 | 100 |
| ELLAS | 1 | 1 | 1 | 3 | 2 | 14 | 33 | 32 | 6 | 3 | 1 | 3 | 100 |
| ESPANA | - | 1 | 1 | 3 | 2 | 7 | 26 | 43 | 9 | 4 | 2 | 2 | 100 |
| FRANCE | 1 | 4 | 1 | 3 | 4 | 8 | 26 | 39 | 8 | 2 | 2 | 2 | 100 |
| IRELAND | 1 | 1 | 2 | 3 | 4 | 14 | 26 | 32 | 9 | 4 | 2 | 2 | 100 |
| ITALIA | 1 | 1 | 1 | 1 | 2 | 5 | 29 | 49 | 7 | 1 | 1 | 2 | 100 |
| LUXEMBOURG | 1 | 6 | 2 | 2 | 6 | 15 | 19 | 30 | 12 | 2 | 3 | 2 | 100 |
| NEDERLAND | 1 | 3 | 2 | 2 | 5 | 13 | 44 | 16 | 7 | 4 | 1 | 2 | 100 |
| PORTUGAL | 1 | 1 | 1 | 1 | 1 | 7 | 24 | 48 | 14 | 1 | - | 1 | 100 |
| UNITED KINGDOM | 1 | 1 | 3 | 4 | 10 | 15 | 23 | 24 | 11 | 4 | 3 | 1 | 100 |
| EC 12 | 1 | 1 | 2 | 3 | 5 | 11 | 28 | 34 | 9 | 3 | 1 | 2 | 100 |
| BY TYPE OF LOCATION | | | | | | | | | | | | | |
| SEASIDE | - | 1 | 1 | 2 | 5 | 11 | 31 | 37 | 7 | 3 | 1 | 1 | 100 |
| MOUNTAINS | 2 | 4 | 2 | 4 | 4 | 9 | 26 | 32 | 10 | 3 | 1 | 3 | 100 |
| OTHER | 1 | 1 | 3 | 4 | 8 | 10 | 24 | 29 | 11 | 4 | 2 | 3 | 100 |
| BY DESTINATION | | | | | | | | | | | | | |
| OWN COUNTRY | 1 | 2 | 1 | 2 | 5 | 9 | 29 | 37 | 9 | 2 | 1 | 2 | 100 |
| OTHER EC COUNTRY | 1 | 1 | 2 | 5 | 6 | 14 | 27 | 29 | 8 | 4 | 2 | 1 | 100 |
| NON-EC EUROPE | 3 | 1 | 1 | 4 | 8 | 14 | 22 | 27 | 12 | 4 | 1 | 3 | 100 |
| OUTSIDE EUROPE | 7 | 2 | 9 | 9 | 6 | 7 | 18 | 14 | 9 | 6 | 7 | 6 | 100 |

STARTING TIMES OF OTHER HOLIDAYS

QUESTION: In which month did your other holiday start?

| MONTH: | J | F | M | A | M | J | JY | A | S | O | N | D | TOTAL |
|-----------------------|---|----|----|----|----|----|----|----|----|----|---|----|-------|
| BY NATIONALITY | | | | | | | | | | | | | |
| BELGIQUE (1) | | | | | | | | | | | | | |
| DANMARK | 4 | 10 | 6 | 12 | 7 | 3 | 9 | 12 | 10 | 15 | 3 | 9 | 100 |
| DEUTSCHLAND | 5 | 9 | 14 | 10 | 7 | 5 | 4 | 6 | 12 | 16 | 2 | 10 | 100 |
| ELLAS (1) | | | | | | | | | | | | | |
| ESPANA (1) | | | | | | | | | | | | | |
| FRANCE | 1 | 16 | 6 | 18 | 7 | 6 | 8 | 14 | 6 | 3 | 3 | 12 | 100 |
| IRELAND (1) | | | | | | | | | | | | | |
| ITALIA | 5 | 3 | 4 | 10 | 4 | 12 | 13 | 21 | 14 | 1 | 2 | 11 | 100 |
| LUXEMBOURG (1) | | | | | | | | | | | | | |
| NEDERLAND | 2 | 11 | 6 | 11 | 10 | 6 | 15 | 9 | 11 | 11 | 2 | 6 | 100 |
| PORTUGAL (1) | | | | | | | | | | | | | |
| UNITED KINGDOM | 1 | 2 | 5 | 13 | 12 | 9 | 9 | 13 | 15 | 9 | 5 | 7 | 100 |

(1) Insufficient numbers of people taking more than one holiday for a significant breakdown.

3. TYPES OF ACCOMMODATION FOR MAIN AND OTHER HOLIDAYS

The pattern of accommodation used does not vary appreciably between main holidays and other holidays. It is worth noting, however, that, in the "other holiday" category, the largest group is made up by those who stayed with relations or friends.

Breakdown by nationality

For the French, Spanish and Portuguese, the most common holiday accommodation option is staying with relations or friends, going back to their original family roots.

Luxembourg and Germany show the largest percentages of holidaymakers staying at hotels.

Renting a flat or house for the holiday period is the accommodation solution adopted by between 15% and 20% of Europeans of all nationalities, with the exception of the Greeks (only 2%).

Staying at the family's own second home is largely confined to the Greeks, the Spanish, the Dutch, the Italians and Danes.

The numbers taking camping or caravanning holidays vary widely from one nationality to another. For the Dutch, it is the most widely adopted formula (31%). Then come the French, the British, the Portuguese, the Danes and the Belgians.

Breakdown by type of holiday location

With holidays spent by the seaside and especially at mountain resorts, staying at an hotel (or boarding house or motel) is the most widely adopted solution, but still accounts for less than half the total number of holidaymakers, given the competition from camping or caravanning (especially at the seaside) and renting.

In the case of holidays taken elsewhere, staying with friends or relations is by far the most common arrangement, while only about a fifth of holidaymakers stay at hotels.

Breakdown by destination

The further away the holiday, the greater the percentage of holidaymakers staying at hotels. Barely a quarter of those taking holidays in their own countries stayed at hotels, compared with over half of those holidaying in other Community countries or outside Europe.

The figures on which the above comments are based are given in the table on page 38.

ACCOMMODATION ARRANGEMENTS

QUESTION: What sort of accommodation did you stay in?

- (a) Hotel/boarding house/motel
- (b) Rented villa/bungalow/chalet etc.
- (c) Own weekend home or holiday cottage etc.
- (d) Staying with relations or friends
- (e) Stayed as paying guest in private house
- (f) Camping/caravaning
- (g) Holiday village
- (h) Youth hostel, boat/cruise, other

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) | TOTAL |
|----------------|-----|-----|-----|-----|-----|-----|-----|-----|-------|
| BELGIQUE | 30 | 21 | 2 | 16 | 3 | 17 | 5 | 4 | (1) |
| DANMARK | 26 | 10 | 10 | 23 | 1 | 18 | 1 | 11 | (1) |
| DEUTSCHLAND | 43 | 17 | 5 | 12 | 10 | 10 | 1 | 3 | (1) |
| ELLAS | 38 | 2 | 15 | 19 | 22 | 8 | - | 1 | (1) |
| ESPANA | 21 | 13 | 14 | 32 | 5 | 13 | 2 | 4 | (1) |
| FRANCE | 19 | 17 | 7 | 33 | 2 | 22 | 4 | 2 | (1) |
| IRELAND | 33 | 18 | 3 | 30 | 6 | 9 | 1 | 3 | (1) |
| ITALIA | 33 | 17 | 11 | 21 | 7 | 12 | 1 | 2 | (1) |
| LUXEMBOURG | 53 | 20 | 7 | 9 | - | 10 | 2 | 4 | (1) |
| NEDERLAND | 30 | 16 | 12 | 8 | 1 | 31 | - | 6 | (1) |
| PORTUGAL | 13 | 16 | 9 | 42 | 5 | 19 | - | 3 | (1) |
| UNITED KINGDOM | 36 | 19 | 2 | 19 | 1 | 19 | 2 | 5 | (1) |
| EC 12 | 32 | 17 | 7 | 21 | 5 | 16 | 2 | 4 | (1) |

BY TYPE OF LOCATION

| | | | | | | | | | |
|-----------|----|----|---|----|---|----|---|---|-----|
| SEASIDE | 23 | 20 | 7 | 15 | 4 | 21 | 3 | 3 | (1) |
| MOUNTAINS | 41 | 18 | 6 | 15 | 6 | 14 | 2 | 5 | (1) |
| OTHER | 22 | 9 | 8 | 42 | 6 | 9 | 1 | 3 | (1) |

BY DESTINATION

| | | | | | | | | | |
|------------------|----|----|---|----|---|----|---|---|-----|
| OWN COUNTRY | 23 | 17 | 9 | 26 | 5 | 16 | 2 | 3 | (1) |
| OTHER EC COUNTRY | 44 | 18 | 5 | 11 | 4 | 18 | 1 | 4 | (1) |
| NON-EC EUROPE | 54 | 15 | 3 | 8 | 6 | 11 | 3 | 5 | (1) |
| OUTSIDE EUROPE | 55 | 6 | - | 26 | 6 | 8 | 5 | 9 | (1) |

(1) Multiple answers bring the total to more than 100.

4. METHODS OF TRANSPORT FOR MAIN AND OTHER HOLIDAYS

Most Europeans of all nationalities (two-thirds overall) go on holiday by car. The car is very much a part of the stereotype, whether for main holidays or others.

Breakdown by nationality

The numbers travelling to their holiday destinations by air are still small (13% on average), and vary widely from one nationality to another. Not surprisingly, this mode of transport is used most extensively by the island nations: the British and above all the Irish; it is used only exceptionally by the French, Italians, Spanish and Portuguese.

Breakdown by destination

This is of course the main factor influencing the mode of transport used. Only when the destination is outside Europe does travel by air predominate (86%), but even here many holidaymakers use a car on arrival.

Coaches are used as much as trains for journeys to foreign countries.

METHODS OF TRANSPORT

QUESTION: What methods of transport did you use?

- (a) Car
- (b) Train
- (c) Plane
- (d) Boat
- (e) Bicycle/motorbike
- (f) Coach

| | (a) | (b) | (c) | (d) | (e) | (f) | TOTAL |
|----------------------------|-----|-----|-----|-----|-----|-----|-------|
| BELGIQUE | 77 | 6 | 10 | 1 | 2 | 7 | (1) |
| DANMARK | 59 | 14 | 18 | 11 | 3 | 4 | (1) |
| DEUTSCHLAND | 61 | 16 | 17 | 3 | 1 | 7 | (1) |
| ELLAS | 78 | 4 | 13 | 25 | 1 | - | (1) |
| ESPANA | 70 | 16 | 5 | 2 | - | 12 | (1) |
| FRANCE | 81 | 15 | 6 | 2 | 2 | 7 | (1) |
| IRELAND | 51 | 11 | 31 | 18 | 1 | 6 | (1) |
| ITALIA | 73 | 15 | 5 | 5 | 2 | 11 | (1) |
| LUXEMBOURG | 62 | 10 | 19 | 4 | - | 15 | (1) |
| NEDERLAND | 70 | 8 | 14 | 5 | 6 | 14 | (1) |
| PORTUGAL | 76 | 17 | 3 | 3 | 1 | 16 | (1) |
| UNITED KINGDOM | 59 | 11 | 24 | 8 | - | 14 | (1) |
| EC 12 | 68 | 14 | 13 | 5 | 1 | 10 | (1) |
| BY TYPE OF LOCATION | | | | | | | |
| SEASIDE | 69 | 11 | 17 | 6 | 1 | 9 | (1) |
| MOUNTAINS | 73 | 15 | 9 | 3 | 2 | 12 | (1) |
| OTHER | 65 | 19 | 7 | 4 | 2 | 10 | (1) |
| BY DESTINATION | | | | | | | |
| OWN COUNTRY | 78 | 14 | 1 | 3 | 1 | 8 | (1) |
| OTHER EC COUNTRY | 52 | 11 | 32 | 8 | 2 | 13 | (1) |
| NON-EC EUROPE | 53 | 15 | 29 | 6 | - | 18 | (1) |
| OUTSIDE EUROPE | 35 | 19 | 86 | 17 | - | 15 | (1) |

(1) Multiple answers bring the total to more than 100.

5. TYPE OF HOLIDAY LOCATION

Main holidays and other holidays

At least half the holidaymakers of most nationalities take their main holidays by the sea. The exceptions are the Dutch, the Danes, the Germans and the Irish. The Dutch in particular are more or less evenly divided between the countryside, the sea and the mountains.

In the case of "other holidays", it is possible to give some information on holiday locations for those countries where the number of respondents taking more than one holiday represents at least about 20% of the total population.

| | Percentage taking more than one holiday | Breakdown of 100 "other holidays" | | | | |
|----------------|--|-----------------------------------|-----------|------|-----|-----|
| | | Country | Mountains | Town | Sea | |
| France | (27) | 29 | 33 | 22 | 28 | (1) |
| Nederland | (24) | 49 | 26 | 24 | 19 | (1) |
| Danmark | (24) | 34 | 13 | 36 | 27 | (1) |
| United Kingdom | (21) | 38 | 8 | 25 | 36 | (1) |
| Italia | (19) | 13 | 33 | 21 | 37 | (1) |
| Deutschland | (17) | 30 | 29 | 33 | 15 | (1) |

For these extra holidays, the French and Italians, who have the Alps close at hand, are most attracted by a stay in the mountains.

The table overleaf, like the earlier ones, refers to main holidays.

(1) Multiple answers bring the total to more than 100.

HOLIDAY LOCATIONS**QUESTION:** Was it ...

- (a) in the countryside
- (b) in the mountains
- (c) in a town or towns
- (d) by the seaside

| | (a) | (b) | (c) | (d) | TOTAL |
|----------------|-----------|-----------|-----------|-----------|------------|
| | % | % | % | % | % |
| BELGIQUE | 25 | 19 | 5 | 55 | (1) |
| DANMARK | 35 | 14 | 40 | 42 | (1) |
| DEUTSCHLAND | 34 | 30 | 15 | 44 | (1) |
| ELLAS | 8 | 11 | 20 | 70 | (1) |
| ESPANA | 27 | 19 | 27 | 53 | (1) |
| FRANCE | 29 | 27 | 18 | 51 | (1) |
| IRELAND | 27 | 8 | 37 | 46 | (1) |
| ITALIA | 11 | 24 | 19 | 58 | (1) |
| LUXEMBOURG | 19 | 29 | 17 | 62 | (1) |
| NEDERLAND | 39 | 32 | 21 | 36 | (1) |
| PORTUGAL | 29 | 8 | 24 | 62 | (1) |
| UNITED KINGDOM | 29 | 13 | 19 | 58 | (1) |
| EC 12 | 25 | 23 | 19 | 52 | (1) |

(1) The totals reading across the lines come to more than 100, since some holidaymakers stayed at more than one type of location.

6. DESTINATION

A third of all Europeans spend their main holidays abroad, but of course the proportion varies considerably from one country to another.

| | Holidays abroad | |
|--------------|--------------------------------|---------------------------------|
| | Out of 100 main holidays | Out of 100 other holidays |
| Luxembourg | 94 | * |
| Dutch | 64 | 51 |
| German | 60 | 46 |
| Belgian | 56 | * |
| Irish | 51 | * |
| Danish | 44 | 48 |
| British | 35 | 20 |
| French | 16 | 17 |
| Italian | 13 | 9 |
| Portuguese | 8 | * |
| Spanish | 8 | * |
| Greek | 7 | * |
| EC 12 | 32 | 25 |

The great majority of those taking holidays abroad go to other Community countries. Nevertheless, appreciable numbers of people from Germany, Denmark, The Netherlands and Luxembourg visit European countries outside the Community (Scandinavian countries, Switzerland, Austria, East Europe). Travel outside Europe is exceptional (3% of holiday trips on average).

*The proportions of people of these nationalities taking more than one holiday are too small for a significant figure to be quoted.

HOLIDAYS ABROAD**QUESTION:** Where did you go?

In your country

- (a) In another country in the EEC
- (b) Somewhere else in Europe (Switzerland, Austria, Scandinavia, Russia etc.)
- (c) Outside Europe (America, Asia, Africa etc.)

| | TOTAL ABROAD | BREAKDOWN OF DESTINATIONS ABROAD | | | TOTAL |
|----------------|--------------|----------------------------------|-----------|----------|------------|
| | | (a) | (b) | (c) | |
| BELGIQUE | 56 | 47 | 6 | 3 | (1) |
| DANMARK | 44 | 25 | 20 | 3 | (1) |
| DEUTSCHLAND | 60 | 34 | 24 | 3 | (1) |
| ELLAS | 7 | 4 | 3 | 2 | (1) |
| ESPANA | 8 | 7 | 1 | 1 | (1) |
| FRANCE | 16 | 11 | 2 | 4 | (1) |
| IRELAND | 51 | 38 | 8 | 5 | (1) |
| ITALIA | 13 | 8 | 5 | 1 | (1) |
| LUXEMBOURG | 94 | 69 | 18 | 9 | (1) |
| NEDERLAND | 64 | 46 | 17 | 3 | (1) |
| PORTUGAL | 8 | 7 | 1 | 1 | (1) |
| UNITED KINGDOM | 35 | 21 | 10 | 5 | (1) |
| EC 12 | 32 | 20 | 10 | 3 | (1) |

(1) With some holidaymakers visiting Community countries and other countries as well, the total is slightly above the figure in the first column.

7. USE OF TRAVEL AGENCIES, OTHER ORGANIZED TRIPS

The extent to which the services of travel agencies are used varies extremely widely from country to country. They are used most extensively in Ireland, Luxembourg, the United Kingdom, The Netherlands, Germany and Denmark, and these are the countries where the largest proportions of the population take their holidays abroad.

For holiday travel, agencies are called upon to arrange a package more often than a reservation alone.

A package or organized trip is the solution chosen by large numbers of those going abroad, but only exceptionally by those travelling to destinations within their own country.

| For every 100 holidaymakers whose main holiday was ... | A package tour or organized trip was taken by %. |
|---|---|
| ... in their own country | 3 |
| ... in another Community country | 32 |
| ... elsewhere in Europe | 30 |
| ... outside Europe | 40 |
| Average for main holidays | 13 |
| Average for other holidays | 9 |

USE OF AGENCIES OR OTHER TRAVEL ORGANIZERS

QUESTION: How did you book this holiday?

- (a) Through a travel agency as a package tour or organized trip
- (b) Through a travel agency for travel arrangements only
- (c) Through a club or association you belong to
- (d) By yourself or by the family without using a travel agency

| | (a) | (b) | (c) | (d) | NOT STATED | TOTAL |
|----------------|-----------|----------|----------|-----------|------------|------------|
| BELGIQUE | 9 | 8 | 4 | 76 | 3 | 100 |
| DANMARK | 16 | 8 | 5 | 59 | 12 | 100 |
| DEUTSCHLAND | 21 | 4 | 3 | 62 | 10 | 100 |
| ELLAS | 3 | 1 | 3 | 93 | - | 100 |
| ESPANA | 5 | 2 | 1 | 91 | 1 | 100 |
| FRANCE | 5 | 2 | 6 | 87 | - | 100 |
| IRELAND | 22 | 15 | 3 | 58 | 2 | 100 |
| ITALIA | 5 | 2 | 5 | 88 | - | 100 |
| LUXEMBOURG | 26 | 8 | 6 | 60 | - | 100 |
| NEDERLAND | 19 | 9 | 4 | 67 | 1 | 100 |
| PORTUGAL | 1 | 2 | 4 | 93 | - | 100 |
| UNITED KINGDOM | 22 | 7 | 5 | 63 | 3 | 100 |
| EC 12 | 13 | 4 | 4 | 75 | 4 | 100 |

Let us now consider the general configuration of package tours or organized trips (1).

Breakdown per 100 package tours or organized trips

| Destination | | Holiday location | |
|---------------------------|-----|----------------------------|-----|
| Own country | 18 | Countryside | 13 |
| Other EC country | 51 | Mountains | 19 |
| Non-EC Europe | 24 | Town | 21 |
| Outside Europe | 9 | Seaside | 65 |
| | (2) | | (2) |
| Month of departure | | Method of transport | |
| January | 1 | Car | 26 |
| February | 2 | Train | 13 |
| March | 2 | Plane | 55 |
| April | 4 | Boat | 7 |
| May | 12 | Other (coach) | 22 |
| June | 15 | | (2) |
| July | 20 | | |
| August | 19 | | |
| September | 13 | | |
| October | 7 | | |
| November | 3 | | |
| December | 2 | | |
| | 100 | | |
| Duration | | Accommodation | |
| 4 to 9 days | 25 | Hotel | 77 |
| 10 to 19 days | 53 | Rented flat or house | 14 |
| 20 to 29 days | 18 | Paying guest | 8 |
| 30 days or more | 4 | Holiday village | 3 |
| | 100 | Other | 2 |
| | | | (2) |

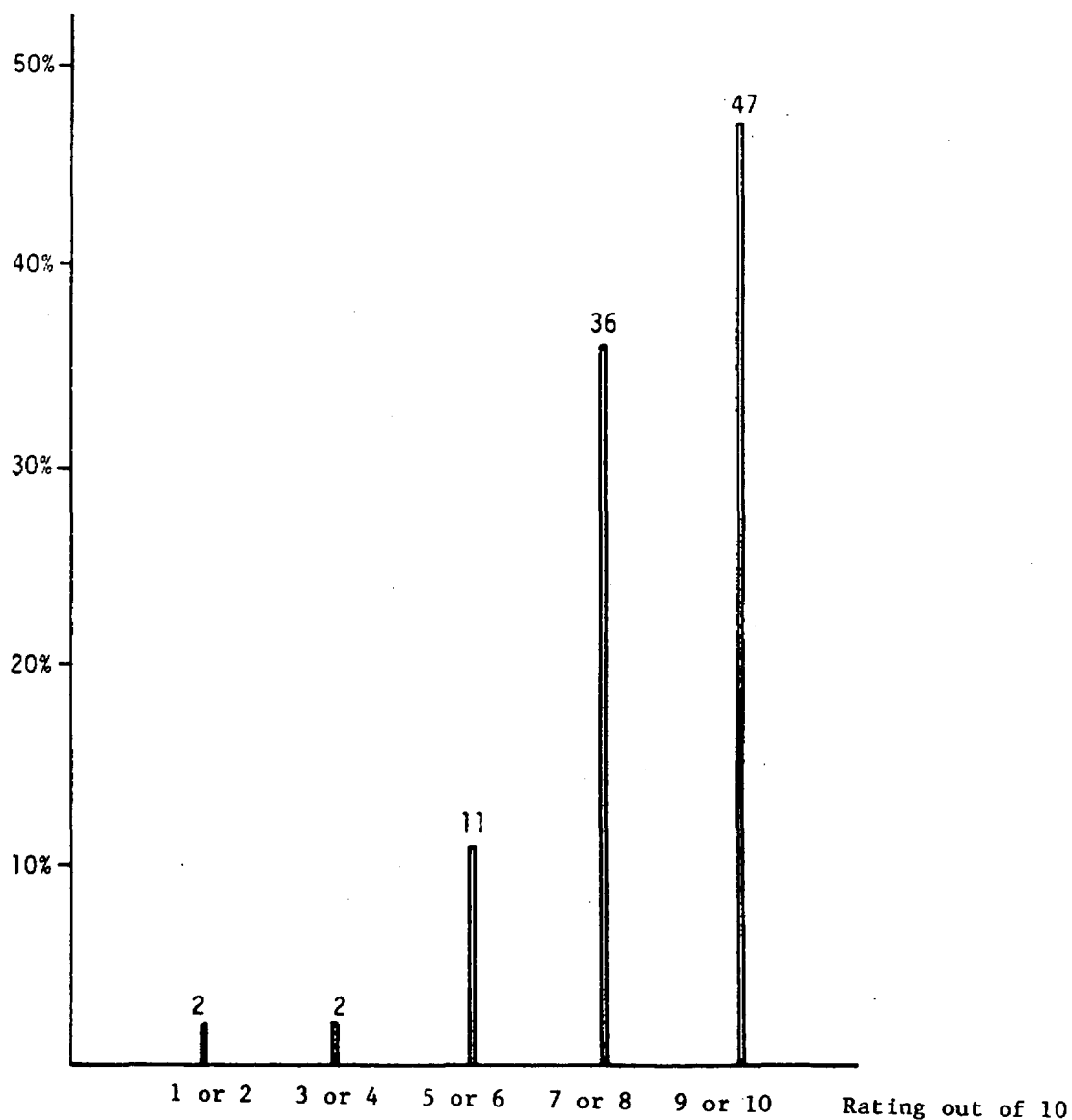
(1) This analysis is based on 846 individuals who went on a package tour or organized trip for their main holiday in 1985.

(2) Multiple answers bring the total to more than 100.

8. SATISFACTION RATINGS

The overall picture is one of a very high degree of satisfaction. On a scale of 1 to 10 (10 being "completely pleased"), respondents gave an average rating of 8.17 for their main holidays in 1985 and, if they had been away more than once, of 8.28 for their other holidays. Very few gave ratings of less than 5 (no more than 4% of respondents overall).

Question: "If you had to give a rating from 1 to 10 to indicate how pleased you were with this holiday, what number would you say?"



Although these ratings were uniformly high, they varied appreciably from one nationality to another.

Ratings of main holidays

Above the average

| | |
|------------|------|
| Danish | 8.64 |
| Luxembourg | 8.52 |
| German | 8.42 |
| Belgian | 8.41 |

Near the average (8.17)

| | |
|---------|------|
| Greek | 8.20 |
| French | 8.17 |
| Irish | 8.15 |
| Spanish | 8.14 |
| British | 8.13 |

Below the average

| | |
|------------|------|
| Italian | 7.96 |
| Dutch | 7.94 |
| Portuguese | 7.52 |

These differences are sizeable enough for it to be worth looking at the pattern of ratings within the average for each country. We find that:

- 1) low ratings (1 to 4) are exceptional with all nationalities;
- 2) there are on the other hand appreciable differences at the upper end of the scale: while 6 out of 10 Danes and Germans gave their holidays very high ratings (9 or 10), only 3 out of 10 of the Dutch and Portuguese respondents did so. Hence the differences found in the averages.

A breakdown of the ratings given by the various nationalities is shown on page 50.

**RATINGS GIVEN TO MAIN HOLIDAYS
BREAKDOWN BY COUNTRY**

| AVERAGE | COUNTRY | 1 TO 4 | 5 TO 6 | 7 TO 8 | 9 TO 10 | TOTAL |
|---------|---------------|--------|--------|--------|---------|-------|
| | | % | % | % | % | % |
| 8.41 | BELGIQUE | 4.1 | 7.8 | 30.0 | 58.1 | 100 |
| 8.64 | DANMARK | 3.8 | 7.6 | 27.6 | 61.0 | 100 |
| 8.42 | DEUTSCHLAND | 6.5 | 6.6 | 26.4 | 60.5 | 100 |
| 8.20 | ELLAS | 3.4 | 11.2 | 37.4 | 48.0 | 100 |
| 8.14 | ESPANA | 3.2 | 13.1 | 37.2 | 46.5 | 100 |
| 8.17 | FRANCE | 2.4 | 13.4 | 39.5 | 44.7 | 100 |
| 8.15 | IRELAND | 5.1 | 9.2 | 38.6 | 47.1 | 100 |
| 7.96 | ITALIA | 5.5 | 13.7 | 39.3 | 41.5 | 100 |
| 8.52 | LUXEMBOURG | 3.5 | 6.9 | 32.9 | 56.7 | 100 |
| 7.94 | NEDERLAND | 1.8 | 10.1 | 57.0 | 31.1 | 100 |
| 7.52 | PORTUGAL | 6.2 | 26.1 | 32.3 | 35.4 | 100 |
| 8.13 | UNITED KINGOM | 4.3 | 11.1 | 36.7 | 47.9 | 100 |
| 8.17 | CE 12 | 4.4 | 11.2 | 36.2 | 48.2 | 100 |

The Dutch are a particularly interesting case. In percentage terms, more of them take holidays away from home than any other Community nationality, and yet, although not dissatisfied with their holidays (only a tiny minority gave very low ratings), they gave only moderately high ratings. It is possible that quite a number of them would be interested in holiday formulas different from those currently on offer.

A sociodemographic breakdown of the replies reveals a number of groups giving their 1985 holidays above-average ratings:

- Women were more satisfied with their holidays than men, giving slightly higher ratings. The difference is not great, but the pattern holds in 10 out of the 12 Member States, the only exceptions being Belgium and Portugal. Doubtless women appreciate being relieved of some of their housekeeping duties.
- Respondents in the upper age group (55+) gave the highest ratings overall, while those aged 25 to 39 (most likely to have been accompanied by young children) gave the lowest.
- Respondents from low-income families (fourth quartile) tended to give slightly higher ratings than the average for their nationality. This was found in all countries except Italy and Greece.

The average ratings given by each sociodemographic group are shown in the table on page 54.

Let us now see how satisfaction ratings varied according to the holiday characteristics about which questions were asked in the survey, i.e. the length of the holiday, the number of people going away together, the time of year, the type of accommodation, the type of location etc.

The first comment to be made in the light of the findings is that no particular type of holiday gets a bad rating. Nearly all the ratings are between 8 and 9 out of 10, but the variations are nevertheless indicative of interesting nuances.

- Starting time: The lowest ratings were given by those who had gone away in August (8.03) or July (8.05), the peak holiday months.
- Size of party: The highest ratings were given by respondents who had been on holiday with one other person (8.38).
- Destination: Respondents who had been to remote places, outside Europe, were most pleased with their holidays (8.70).
- Type of location: Those who had been on holiday at the seaside, the largest group, gave the lowest overall rating (8.00), while those who had been to mountain locations gave the highest (8.44).
- Type of accommodation: The ratings were lowest among those who had spent their holidays at their own second homes (7.97) and highest among those who had been at hotels (8.43).
- Booking arrangements: Of all the respondents, those whose booking arrangements had been made through a club or association of which they were members gave the highest ratings (8.72 if their holiday had been in their own country, 9.07 if it had been abroad). This most remarkable success is doubtless attributable in part to a feeling of belonging and bonds of friendship among people going away together in a group.

In general, persons who have gone on a package tour or an organized trip, are slightly more satisfied (8.28) than the average of holidaymakers (8.17). However, one should keep in mind that the majority of the package tours or organized trips consist of holidays abroad. One should therefore analyse further and compare the level of satisfaction of those who have gone abroad, depending on whether they have organized their trip themselves or whether they have gone on a package tour or organized trip.

Satisfaction rating

For those who have gone abroad ...

| | |
|---|--------|
| ... by self | 8.54 |
| ... by package tour/organized trip ... | 8.24 |
| (Average for all those who have gone abroad) | (8.41) |

Those who have gone abroad having organized the trip themselves are slightly more satisfied. One would however want to know how to compare the expenses of one from the other; this first European survey has not touched upon this point which would merit further study.

The average satisfaction ratings given for each type of holidays are shown in the table on page 54.

SATISFACTION RATINGS (MAIN HOLIDAYS)

OVERALL AVERAGE: 8.17

BY TYPE OF HOLIDAYMAKER**BY SEX**

| | |
|--------|-------|
| Male | 8.12 |
| Female | 8.21+ |

BY AGE

| | |
|-------|-------|
| 20-24 | 8.03 |
| 25-39 | 7.91- |
| 40-54 | 8.18 |
| 55+ | 8.59+ |

BY FAMILY INCOME

| | |
|------------|-------|
| High R + + | 8.16 |
| R + | 8.06 |
| R - | 8.05 |
| Low R - - | 8.40+ |

**BY NUMBER OF PEOPLE
HOLIDAYING TOGETHER**

| | |
|----|-------|
| 1 | 8.15 |
| 2 | 8.38+ |
| 3 | 7.97 |
| 4 | 8.07 |
| 5 | 7.98 |
| 6+ | 8.16 |

BY TYPE OF HOLIDAY**BY TIMING OF MAIN HOLIDAY**

| | |
|-----------|-------|
| Jan/Feb | 8.34 |
| March | 8.52 |
| April | 8.45 |
| May | 8.42 |
| June | 8.33 |
| July | 8.05- |
| August | 8.03- |
| September | 8.23 |
| October | 8.66 |
| November | 8.45 |
| December | 8.64 |

BY TYPE OF HOLIDAY LOCATION

| | |
|-------------|-------|
| Countryside | 8.28 |
| Mountains | 8.44+ |
| Town | 8.32 |
| Seaside | 8.00- |

BY DESTINATION

| | |
|--------------------|-------|
| Own country | 8.06 |
| Other EC countries | 8.33 |
| Non-EC Europe | 8.48 |
| Outside Europe | 8.70+ |

BY TYPE OF ACCOMMODATION

| | |
|------------------------------|-------|
| Hotel | 8.40 |
| Rented flat or house | 7.97 |
| Second home | 7.87- |
| With friends or relations | 8.08 |
| Camping/caravaning | 7.93 |

BY BOOKING ARRANGEMENTS

| | |
|--------------------------------|------|
| Package/organized trip | 8.28 |
| Through club or association | 8.86 |
| By self or family | 8.13 |

9. THE HOLIDAYMAKING PATTERN ACCORDING TO SOCIO-OCCUPATIONAL STATUS

Before examining whether the pattern of holidaymaking varies from one socio-occupational group to another, and if so how, it is as well to reflect a moment on the relative size of these various groups and the proportion of the total number of European holidaymakers accounted for by each.

As seen on page 18, the proportion of the members of a group taking holidays away from home ranges from 85% in the families of senior managers to only 25% in the families of farmers.

It is also necessary to take the sizes of the various groups into account: for instance, 27% of Europeans belong to family groups in which the head of household is a manual worker, whereas the corresponding figure for senior managers and members of the professions is only 8%.

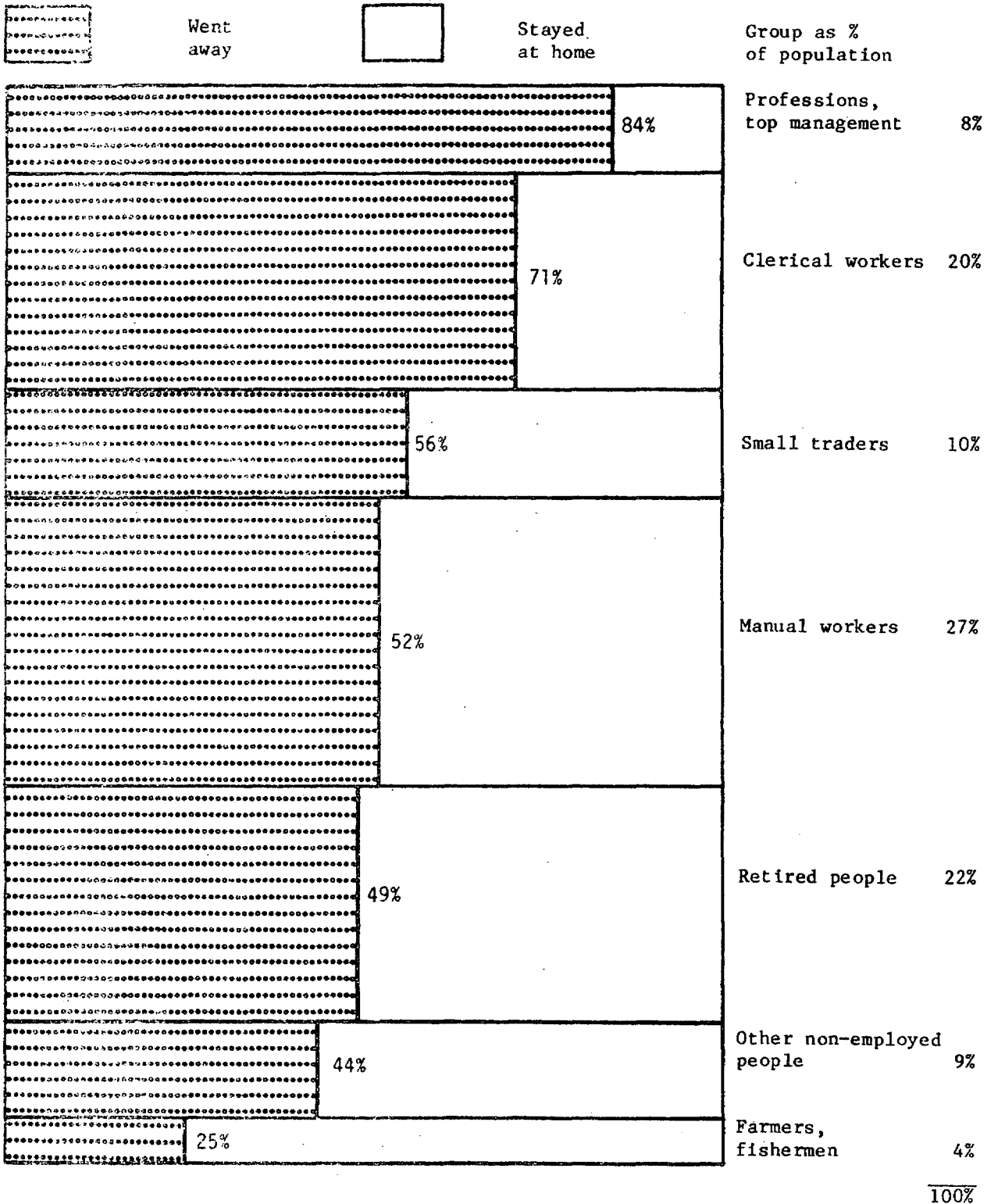
The graph on the next page illustrates these two variables: the percentage of the total population represented by each group on the Y-axis, and the percentage of each group taking holidays away from home on the X-axis.

The breakdown by socio-occupational group of the Europeans who spent a holiday away from home lasting at least four days in 1985 is as follows:

| | Of 100 adult holidaymakers % | Estimated totals |
|--|------------------------------------|---------------------|
| The following numbers belong to a group in which the head of household is | | |
| Top manager | 8) | |
| Member of a profession | 4(12 | 16,800,000 |
| Clerical worker | 25 | 35,000,000 |
| Small businessman | 10 | 14,000,000 |
| Manual worker | 25 | 35,000,000 |
| Retired | 19 | 26,000,000 |
| Other non-employed | 7 | 9,800,000 |
| Farmer | 2 | 2,800,000 |
| | 100 | about 140,000,000 |

It has not been possible to include farmers in the analyses on the following pages, because there were too few in the sample of people taking holidays away from home.

SOCIO-OCCUPATIONAL GROUPS ACCORDING TO WHAT PROPORTION
WENT AWAY ON HOLIDAY IN 1985, AND AS % OF THE TOTAL POPULATION



For instance: of the families of clerical workers, who account for 20% of the total population, 71% took holidays away from home.

Let us now consider how the holidays of people from these socio-occupational groups compare. For each of these groups, the survey provides details of the timing of holidays, their duration, the destination, the type of location, methods of transport used, accommodation arrangements, booking arrangements made, and respondents' ratings of how satisfactory their holidays were.

Whereas significant variations from one group to another might have been expected, the most striking thing about the answers is their great similarity. There are of course differences, but they are much less significant than anticipated.

In other words, it is mainly in the relative numbers of those going away on holiday and those staying at home that socio-occupational groups differ from one another. Among those going away, belonging to one or other group is not a very influential factor in the pattern of holidaymaking reflected by the survey findings. The tables giving details are on pages 62 to 65.

The professions and senior managers

As seen above, this is the group with the highest percentage of people who take holidays away from home; they also go away most often. Main holidays are heavily concentrated on July and August; they are longer than in other groups (lasting over 20 days in 41% of cases). Slightly more are taken in foreign countries, mainly other Community countries; the proportion of holidays outside Europe is no higher than the overall average (3%).

Holidaymakers in this group are slightly more mobile than the average; 6 out of 10 spend at least part of their holidays at the seaside, this being the highest figure recorded. In common with everyone else, their main mode of transport is by car; only 15% go by air. Where accommodation is concerned, they differ most from other holidaymakers in that more of them rent (23%) or stay as paying guests (14%) than others, and very few of them go on camping or caravanning holidays (3%). Finally, they use the services of travel agencies (for packages or bookings) to the same extent as other holidaymakers.

About half of these holidaymakers belonging to the families of members of the professions or senior managers go away more than once a year on holidays lasting at least four days, and about 1 in 10 as often as four times. This group differs from the others in that February and April are more markedly peak months for other holidays, about a third of which are winter holidays spent at mountain resorts.

Small traders

The pattern of holidaymaking in this group is very similar to the general pattern, except that periods spent away from home are slightly shorter (9 days or less in three cases out of ten).

Among the minority who go away more than once, "other holidays" are fairly evenly spread through the year; fewer people in this group than in others holiday at mountain resorts, more at the seaside; more stay at hotels.

Clerical workers

People in this group take their summer holidays predominantly in July and August, with an even split between the two months; in fact, holidaying in July is more common in this group than in any other. As far as other aspects are concerned, the pattern is very close to the average.

Other holidays, which are taken by a fairly high proportion of people in this group, are evenly spread through the year; it is common for them to be spent staying with relations or friends.

Manual workers

A very high proportion of people in this group (42%) take their main holidays in August. The percentage going abroad (27%) is slightly below average. Staying with family or friends is a little more widespread than in other groups (24%), as is camping or caravanning (20%). A very high proportion (56%) go to the seaside. About a quarter of the people in this group who take holidays away from home do so more than once a year, and they tend to spend their other holidays in the countryside.

Retired people

This group is made up, by definition, of people who are elderly and are no longer tied by work-related constraints. In addition, incomes in this group are below the average and, in three-quarters of cases, households consist of only one or two people. For these various reasons, one might expect to find a pattern of holidaymaking specific to this group, but in many respects, as we shall see, such an assumption is not borne out by the facts.

As indicated above, the overall proportion of retired people in Europe taking holidays away from home is lower than among the working population. However, the difference is relatively small. One in two went away on holiday for four days or more at least once during 1985, and the proportion doing so more than once is within 1% of the figure for the population as a whole.

| | Total population | Retired people's households |
|--|---------------------|--------------------------------|
| In 1985 | | |
| % who did not go away on holiday, | | |
| of whom: - habitually stay at home | 21) 23(44 | 31) 20(51 |
| - others | | |
| % who went away on holiday: - once | 37) 19(56 | 31) 18(49 |
| - more than once | | |
| Thus, compared with the average for the adult population as a whole, the index for retired people is 0.88. | | |

Among retired people who had not been away on holiday, lack of means does not appear to have been the main reason for staying at home. Only 1 in 3 gave this reason, a rather smaller proportion than among the working population (retired people 36%; population as a whole 44%). On the other hand, more retired people said that they preferred to stay at home or were unable to go away for other reasons.

Retired people therefore represent an interesting clientele for the tourism industry. Moreover, closer analysis reveals that those aged between 60 and 70 go away on holiday more often than the average for the population as a whole.

| By age | % of members of retired people's households going away on holiday |
|-------------|--|
| Under 55 | 49 |
| 55 to 59 | 50 |
| 60 to 64 | 59 |
| 65 to 69 | 57 |
| 70 to 74 | 50 |
| 75 to 79 | 32 |
| 80 and over | 28 |

The smaller proportion of people in the youngest age group going away on holiday shown in this table may be explained by the fact that some of them, although retired, still have some occupational activity and others still have young dependants, while their incomes have fallen. The "good customers" in this group are therefore mainly those aged between 60 and 70.

What of the pattern of their holidaymaking?

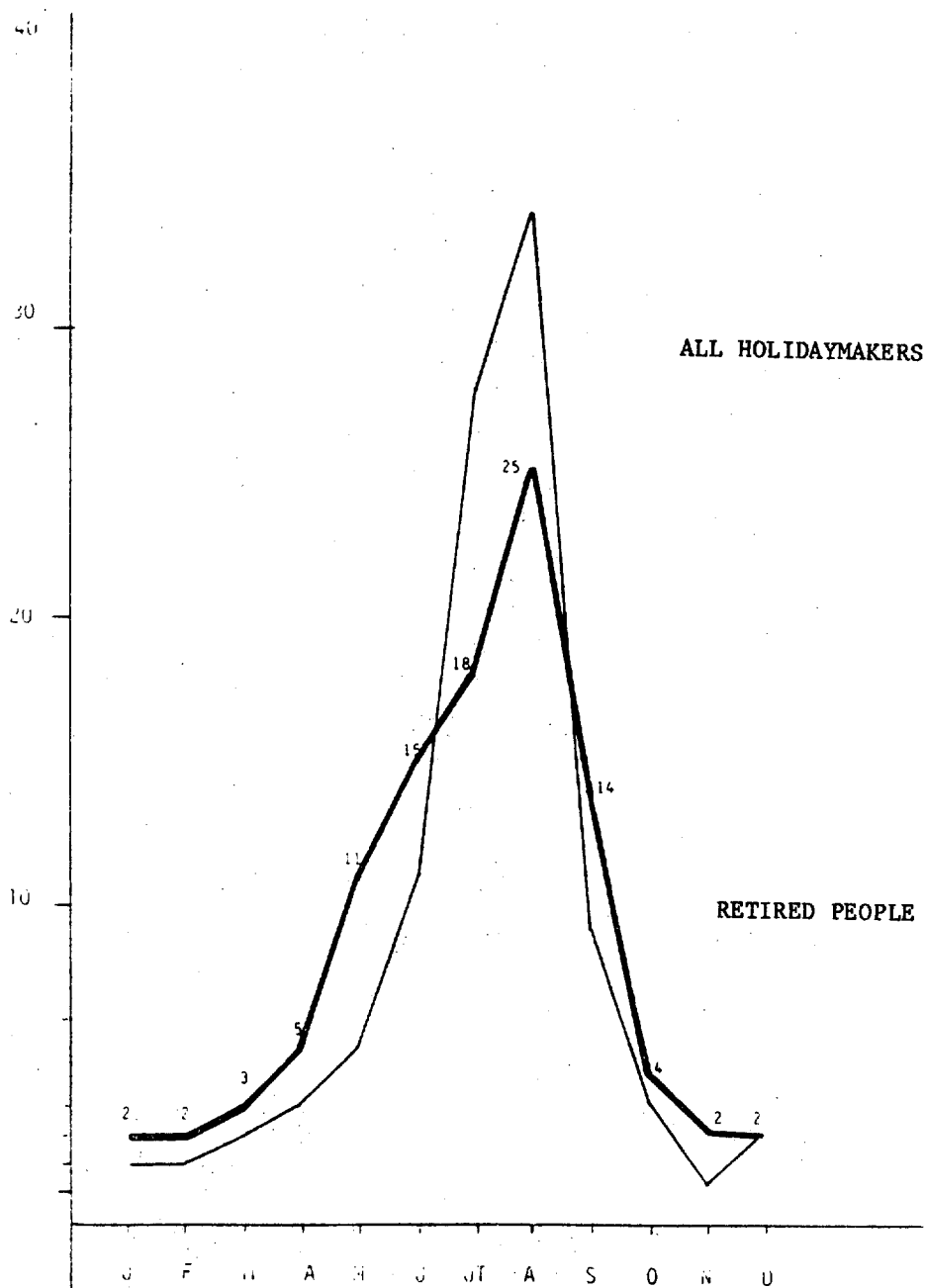
The starting dates of their main holidays are spread rather more evenly through the year than those of holidaymakers generally, but there is still a considerable peak in July/August (see graph overleaf).

Holidaying by the sea does not predominate to the same extent among retired people, but it is still the most popular option (39%). A much higher proportion of retired people stay at hotels (42%) than is the case in the other socio-occupational groups.

The "other holidays" of retired people who go away more than once are evenly spread through the year, with a small peak in September.

Finally, retired people make as much use as other holidaymakers of the services of travel agencies, and a higher proportion (about 16%) travel by coach; these two points apply to both main and other holidays.

**RETIRED PEOPLE'S STARTING DATES
COMPARED WITH THOSE OF HOLIDAYMAKERS AS A WHOLE
(MAIN HOLIDAYS)**



DESCRIPTION OF MAIN HOLIDAYS, BY SOCIO-OCCUPATIONAL GROUP

| PERIOD | PROFESSIONS, TOP MANAGERS | SMALL TRADERS | CLERICAL | MANUAL | RETIRED PEOPLE | OTHER NON-EMPLOYED PEOPLE | ALL HOLIDAY- MAKERS |
|--------------------|------------------------------|-------------------|-------------------|-------------------|-------------------|---------------------------------|---------------------------|
| January | - | 2 | 1 | 1 | 1 | 2 | 1 |
| February | 1 | 3 | 2 | 1 | 1 | 1 | 1 |
| March | 1 | 2 | 2 | 2 | 3 | 1 | 2 |
| April | 2 | 3 | 2 | 3 | 5 | 5 | 3 |
| May | 4 | 4 | 4 | 3 | 10 | 7 | 5 |
| June | 9 | 10 | 8 | 9 | 15 | 13 | 11 |
| July | 32 | 24 | 34 | 29 | 19 | 29 | 28 |
| August | 36 | 36 | 33 | 42 | 25 | 24 | 34 |
| September | 8 | 7 | 8 | 6 | 14 | 10 | 9 |
| October | 3 | 4 | 3 | 2 | 4 | 3 | 3 |
| November | 2 | 3 | 1 | - | 1 | 1 | 1 |
| December | 2 | 2 | 2 | 2 | 2 | 4 | 2 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| DURATION | | | | | | | |
| 4 to 9 days | 18 | 29 | 20 | 28 | 27 | 29 | 24 |
| 10 to 19 days | 41 | 41 | 43 | 42 | 42 | 41 | 43 |
| 20 to 29 days | 22) ⁴¹ | 17) ²⁷ | 23) ³⁷ | 18) ³⁹ | 14) ³¹ | 21) ³⁰ | 19) ³³ |
| 30 days or more | 19(⁴¹ | 10(²⁷ | 14(³⁷ | 12(³⁹ | 17(³¹ | 9(³⁰ | 14(³³ |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| DESTINATION | | | | | | | |
| Own country | 60 | 70 | 65 | 73 | 70 | 55 | 67 |
| Other EC countries | 27 | 17 | 22 | 17 | 18 | 26 | 20 |
| Non-EC Europe | 10 | 8 | 10 | 8 | 10 | 18 | 10 |
| Outside Europe | 3 | 6 | 3 | 2 | 2 | 1 | 3 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| MOBILITY | | | | | | | |
| Same place | 69 | 69 | 72 | 78 | 72 | 72 | 73 |
| Several places | 31 | 29 | 27 | 22 | 26 | 27 | 26 |
| Not stated | - | 2 | 1 | - | 2 | 1 | 1 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| LOCATION | | | | | | | |
| Countryside | 24 | 21 | 23 | 24 | 29 | 31 | 25 |
| Mountains | 25 | 25 | 22 | 19 | 25 | 24 | 23 |
| Town | 16 | 24 | 18 | 16 | 21 | 22 | 19 |
| Seaside | 61 | 52 | 55 | 56 | 39 | 44 | 52 |
| | (1) | (1) | (1) | (1) | (1) | (1) | (1) |

(1) Multiple answers bring the total to more than 100.

DESCRIPTION OF MAIN HOLIDAYS, BY SOCIO-OCCUPATIONAL GROUP (continued)

| | PROFESSIONS, TOP MANAGERS | SMALL TRADERS | CLERICAL | MANUAL | RETIRED PEOPLE | OTHER NON-EMPLOYED PEOPLE | ALL HOLIDAY- MAKERS |
|--|------------------------------|------------------|-------------|-------------|-------------------|---------------------------------|---------------------------|
| MEANS OF TRANSPORT | | | | | | | |
| Car | 70 | 70 | 72 | 76 | 57 | 55 | 68 |
| Train | 11 | 11 | 11 | 11 | 20 | 23 | 14 |
| Plane | 15 | 15 | 10 | 12 | 11 | 13 | 13 |
| Boat | 6 | 5 | 4 | 4 | 5 | 6 | 5 |
| Bicycle/motorbike | 1 | 1 | 2 | 2 | - | 1 | 1 |
| Coach | 10 | 7 | 6 | 7 | 16 | 16 | 10 |
| | (1) | (1) | (1) | (1) | (1) | (1) | (1) |
| ACCOMMODATION | | | | | | | |
| Hotel | 33 | 35 | 30 | 24 | 42 | 32 | 32 |
| Renting | 23 | 13 | 19 | 18 | 12 | 11 | 17 |
| Second home | 8 | 8 | 8 | 6 | 7 | 7 | 7 |
| Relations/friends | 5 | 18 | 19 | 24 | 23 | 24 | 21 |
| Paying guest | 14 | 7 | 5 | 4 | 5 | 4 | 5 |
| Camping/caravanning | 3 | 16 | 18 | 20 | 7 | 18 | 16 |
| Other | 4 | 5 | 6 | 7 | 4 | 10 | 4 |
| | (1) | (1) | (1) | (1) | (1) | (1) | (1) |
| BOOKING ARRANGEMENTS | | | | | | | |
| Agency (package/ organized trip) | 14 | 14 | 12 | 11 | 15 | 13 | 13 |
| Agency (for travel only) | 5 | 5 | 5 | 4 | 3 | 3 | 4 |
| Club or association | 4 | 2 | 3 | 4 | 7 | 6 | 4 |
| By self | 75 | 76 | 78 | 78 | 71 | 71 | 75 |
| Not stated | 2 | 3 | 2 | 3 | 4 | 7 | 4 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Average satisfaction rating | 8.14 | 8.16 | 8.00 | 8.02 | 8.53 | 8.32 | 8.17 |

(1) Multiple answers bring the total to more than 100.

DESCRIPTION OF OTHER HOLIDAYS, BY SOCIO-OCCUPATIONAL GROUP

| | PROFESSIONS, TOP MANAGERS | SMALL TRADERS | CLERICAL | MANUAL | RETIRED PEOPLE | OTHER NON-EMPLOYED PEOPLE | ALL HOLIDAY- MAKERS |
|--------------------|------------------------------|------------------|----------|--------|-------------------|---------------------------------|---------------------------|
| PERIOD | | | | | | | |
| January | 3 | 1 | 4 | 1 | 2 | 3 | 3 |
| February | 14 | 6 | 8 | 7 | 3 | 4 | 7 |
| March | 5 | 6 | 6 | 11 | 8 | 3 | 7 |
| April | 19 | 12 | 15 | 14 | 9 | 8 | 13 |
| May | 6 | 7 | 6 | 4 | 10 | 8 | 7 |
| June | 5 | 6 | 8 | 8 | 8 | 6 | 7 |
| July | 7 | 6 | 7 | 11 | 9 | 11 | 8 |
| August | 15 | 17 | 14 | 11 | 12 | 11 | 13 |
| September | 8 | 13 | 7 | 9 | 20 | 12 | 11 |
| October | 5 | 7 | 6 | 5 | 7 | 14 | 7 |
| November | 1 | 5 | 4 | 3 | 3 | 1 | 3 |
| December | 11 | 10 | 11 | 12 | 6 | 12 | 10 |
| Not stated | 1 | 4 | 4 | 4 | 3 | 7 | 4 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| DURATION | | | | | | | |
| 4 to 9 days | 67 | 69 | 61 | 68 | 50 | 60 | 62 |
| 10 to 19 days | 27 | 23 | 29 | 22 | 33 | 27 | 27 |
| 20 to 29 days | 5 | 5 | 7 | 6 | 13 | 7 | 7 |
| Not stated | 1 | 3 | 5 | 4 | 4 | 6 | 4 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| DESTINATION | | | | | | | |
| Own country | 74 | 75 | 68 | 81 | 72 | 60 | 72 |
| Other EC countries | 12 | 16 | 16 | 8 | 14 | 15 | 13 |
| Non-EC Europe | 9 | 6 | 9 | 6 | 8 | 20 | 9 |
| Outside Europe | 3 | 1 | 3 | 1 | 3 | 2 | 3 |
| Not stated | 2 | 2 | 4 | 4 | 3 | 3 | 3 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| MOBILITY | | | | | | | |
| Same place | 75 | 78 | 78 | 74 | 72 | 61 | 74 |
| Several places | 23 | 19 | 19 | 22 | 24 | 35 | 22 |
| Not stated | 2 | 3 | 3 | 4 | 4 | 4 | 4 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| LOCATION | | | | | | | |
| Countryside | 26 | 17 | 26 | 33 | 30 | 38 | 28 |
| Mountains | 31 | 16 | 27 | 23 | 23 | 14 | 24 |
| Town | 24 | 26 | 24 | 20 | 29 | 32 | 25 |
| Seaside | 26 | 40 | 29 | 30 | 26 | 26 | 29 |
| | (1) | (1) | (1) | (1) | (1) | (1) | (1) |

(1) Multiple answers bring the total to more than 100.

DESCRIPTION OF OTHER HOLIDAYS, BY SOCIO-OCCUPATIONAL GROUP (continued)

| | PROFESSIONS, TOP MANAGERS | SMALL TRADERS | CLERICAL | MANUAL | RETIRED PEOPLE | OTHER NON-EMPLOYED PEOPLE | ALL HOLIDAY- MAKERS |
|--|------------------------------|------------------|-------------|-------------|-------------------|---------------------------------|---------------------------|
| MEANS OF TRANSPORT | | | | | | | |
| Car | 64 | 68 | 71 | 73 | 59 | 48 | 67 |
| Train | 15 | 14 | 13 | 7 | 17 | 25 | 14 |
| Plane | 11 | 14 | 8 | 5 | 6 | 5 | 8 |
| Boat | 6 | 4 | 4 | 4 | 4 | 4 | 4 |
| Bicycle/motorbike | 1 | - | 2 | 1 | - | 3 | 1 |
| Coach | 10 | 4 | 7 | 12 | 17 | 19 | 11 |
| | (1) | (1) | (1) | (1) | (1) | (1) | (1) |
| ACCOMMODATION | | | | | | | |
| Hotel | 28 | 37 | 22 | 22 | 37 | 33 | 28 |
| Renting | 17 | 11 | 14 | 14 | 7 | 5 | 12 |
| Second home | 9 | 8 | 7 | 6 | 5 | 6 | 7 |
| Relations/friends | 26 | 28 | 33 | 32 | 31 | 34 | 31 |
| Paying guest | 5 | 2 | 3 | 4 | 3 | 4 | 4 |
| Camping/caravaning | 9 | 10 | 12 | 15 | 10 | 14 | 12 |
| Other | 9 | 2 | 6 | 8 | 6 | 5 | 6 |
| | (1) | (1) | (1) | (1) | (1) | (1) | (1) |
| BOOKING ARRANGEMENTS | | | | | | | |
| Agency (package/ organized trip) | 8 | 10 | 8 | 9 | 10 | 9 | 9 |
| Agency (for travel only) | 4 | 5 | 5 | 3 | 2 | 6 | 4 |
| Club or association | 6 | 3 | 5 | 7 | 11 | 8 | 7 |
| By self | 79 | 73 | 77 | 77 | 72 | 72 | 76 |
| Not stated | 3 | 9 | 5 | 4 | 5 | 5 | 4 |
| | 100 | 100 | 100 | 100 | 100 | 100 | 100 |
| Average satisfaction rating | 8.11 | 8.41 | 8.06 | 8.17 | 8.71 | 8.39 | 8.28 |

(1) Multiple answers bring the total to more than 100.

PART THREE**AN INDICATION OF EUROPEANS' HOLIDAY PREFERENCES**

The findings reported here are for the adult European population as a whole, including those who do not take holidays away from home as well as those who do.

1. THE MOST ATTRACTIVE POINTS IN A HOLIDAY DESTINATION

Question: "Looking at this list, what are the things which in your own opinion are the most attractive points when choosing somewhere to go on holiday?" (The interviewer showed the list)

All 12 EC countries

(Mentions in declining order of frequency)

| | |
|--|-----|
| Seeing marvels of nature (waterfalls, mountains, caves etc.) | 56% |
| Unspoilt countryside | 37% |
| Cost of living not too high | 34% |
| Monuments, museums, galleries | 28% |
| Feeling of being in a really foreign country | 26% |
| Comfortable hotels | 26% |
| Entertainments (cinema, dancing, amusement parks etc.) | 23% |
| Opportunity to take part in various sports | 14% |
| No reply | 2% |
| | (1) |

Interest was shown in this question by all or virtually all the respondents, even those who never go away on holiday. We can now look at how the replies varied from one segment of the population to another. All the figures on which the following comments are based are given in the two tables on pages 70 and 71.

Seeing marvels of nature (56% on average)

Of all the points listed in the question, this one was uniformly considered the most attractive. It was mentioned most often in all countries (with the sole exception of Ireland), and irrespective of whether or not respondents went away on holiday, their age, their income level, their socio-occupational status or their level of education.

(1) The total is more than 100 because respondents were free to pick as many points from the list as they chose (the average was 2.4 mentions per respondent).

Why are Europeans so keenly interested in the marvels of nature? The survey provides no answer, but this is a specific example of the public's taste for the exceptional, which is strongly encouraged by the media. It is also known that holidays are widely discussed in conversations during the course of which photographs or films are shown to friends, and natural phenomena make excellent pictures.

Unspoilt countryside (37% on average)

Particular importance was attached to this point by the British, Germans and people from the Benelux countries, but it was mentioned by relatively few of the Greek, Spanish and Portuguese respondents. It is mainly the better educated and better off, business executives and members of the professions, in other words the most experienced holidaymakers, who want to find unspoilt countryside where they go on holiday.

Cost of living not too high (34% on average)

This was by far the most important consideration for the Irish, and also a fairly significant one for the Germans. As could be expected, concern with this point was slightly above the average among respondents from modest backgrounds, but the differences according to income level were not as great as might have been anticipated. In fact, whichever segment is considered, the proportion of respondents mentioning the cost of living among the important points in choosing where to go on holiday is generally found to be between 25% and 35%.

Monuments, museums, galleries (28% on average)

Interest in monuments, museums and galleries was found in all groups, although with low returns among young people and those who never take holidays away from home.

Feeling of being in a really foreign country (26% on average)

The French mentioned this point far more frequently than other nationalities, ranking it above all the others except the opportunity to see marvels of nature. Taking Europe as a whole, young people, those with a high level of education and those who took holidays away from home most often showed much more interest in this point than other people.

Comfortable hotels (26% on average)

The British attach a great deal of importance to comfortable hotel accommodation, as do people in the upper age group (as pointed out earlier).

Entertainments (23% on average)

The Irish and British are much more interested than the other nationalities in finding entertainment facilities (e.g. cinema, dancing, amusement parks) where they go on holiday. Young people also attached high importance to this point, which they ranked equal first with seeing marvels of nature.

Opportunity to take part in various sports (14% on average)

The respondents from almost all the countries attached less importance to the opportunity to take part in sports than to any of the other points. This is accounted for by the fact that sports facilities were of interest to only certain segments of the population: the young, the well off, senior managers and members of the professions, those who often took holidays away from home.

All the figures are shown in the tables on the following two pages.

THE MOST ATTRACTIVE POINTS WHEN CHOOSING SOMEWHERE TO GO ON HOLIDAY

Question: Looking at this list, what are the things which in your opinion are the most attractive points when choosing somewhere to go on holiday?

- (a) Seeing marvels of nature
- (b) Unspoilt countryside
- (c) Cost of living not too high
- (d) Monuments, museums, galleries
- (e) Feeling of being in a really foreign country
- (f) Comfortable hotels
- (g) Entertainments
- (h) Opportunity to take part in various sports

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) |
|----------------|-----|-----|-----|-----|-----|-----|-----|-----|
| BELGIQUE | 42 | 43 | 25 | 16 | 30 | 25 | 22 | 14 |
| DANMARK | 62 | 38 | 25 | 21 | 36 | 17 | 9 | 7 |
| DEUTSCHLAND | 47 | 43 | 40 | 30 | 23 | 22 | 21 | 14 |
| ELLAS | 39 | 16 | 36 | 25 | 16 | 14 | 25 | 7 |
| ESPANA | 52 | 17 | 12 | 28 | 5 | 14 | 19 | 9 |
| FRANCE | 68 | 34 | 35 | 31 | 46 | 20 | 20 | 22 |
| IRELAND | 30 | 28 | 53 | 14 | 23 | 39 | 47 | 15 |
| ITALIA | 63 | 37 | 38 | 27 | 30 | 24 | 22 | 14 |
| LUXEMBOURG | 67 | 52 | 36 | 35 | 25 | 42 | 15 | 25 |
| NEDERLAND | 66 | 42 | 36 | 25 | 32 | 22 | 17 | 16 |
| PORTUGAL | 36 | 17 | 35 | 22 | 11 | 11 | 22 | 13 |
| UNITED KINGDOM | 56 | 51 | 36 | 27 | 21 | 51 | 31 | 12 |
| EC 12 | 58 | 37 | 34 | 28 | 26 | 26 | 23 | 14 |

**BY EXPERIENCE
OF HOLIDAYS**

| | | | | | | | | |
|---------------------------|----|----|----|----|----|----|----|----|
| REGULARLY STAY AT HOME | 47 | 27 | 35 | 22 | 17 | 22 | 15 | 6 |
| OTHERS WHO STAYED AT HOME | 54 | 34 | 31 | 29 | 24 | 27 | 25 | 14 |

WENT AWAY IN 85:

| | | | | | | | | |
|---------------------|----|----|----|----|----|----|----|----|
| ONCE | 56 | 40 | 35 | 26 | 27 | 25 | 26 | 15 |
| TWICE | 66 | 44 | 39 | 34 | 34 | 31 | 23 | 21 |
| THREE TIMES OR MORE | 70 | 51 | 31 | 38 | 40 | 26 | 21 | 22 |

THE MOST ATTRACTIVE POINTS WHEN CHOOSING SOMEWHERE TO GO ON HOLIDAY

(continued)

| | (a) | (b) | (c) | (d) | (e) | (f) | (g) | (h) |
|---|-----|-----|-----|-----|-----|-----|-----|-----|
| EC 12 | 56 | 37 | 34 | 28 | 26 | 26 | 23 | 14 |
| BY SEX | | | | | | | | |
| MALE | 54 | 38 | 33 | 25 | 26 | 24 | 23 | 18 |
| FEMALE | 57 | 36 | 35 | 30 | 26 | 28 | 23 | 11 |
| BY AGE | | | | | | | | |
| 15-24 | 48 | 31 | 29 | 21 | 32 | 20 | 48 | 30 |
| 25-39 | 59 | 40 | 34 | 27 | 32 | 23 | 25 | 18 |
| 40-54 | 59 | 38 | 37 | 30 | 24 | 26 | 14 | 10 |
| 55+ | 56 | 38 | 34 | 30 | 18 | 33 | 10 | 3 |
| BY FAMILY INCOME | | | | | | | | |
| HIGH R + + | 62 | 44 | 30 | 32 | 32 | 25 | 22 | 19 |
| R + | 62 | 42 | 30 | 30 | 29 | 29 | 24 | 14 |
| R - | 54 | 35 | 39 | 25 | 26 | 26 | 23 | 12 |
| LOW R - - | 53 | 30 | 37 | 27 | 22 | 24 | 18 | 8 |
| BY OCCUPATION OF HEAD OF HOUSEHOLD | | | | | | | | |
| TOP MANAGEMENT | 63 | 51 | 26 | 34 | 42 | 29 | 24 | 25 |
| PROFESSIONAL | 67 | 48 | 25 | 38 | 35 | 27 | 19 | 23 |
| CLERICAL | 60 | 41 | 35 | 29 | 33 | 24 | 24 | 19 |
| SMALL BUSINESS | 50 | 36 | 29 | 25 | 26 | 25 | 26 | 19 |
| MANUAL | 54 | 34 | 37 | 22 | 25 | 23 | 29 | 15 |
| RETIRED | 57 | 36 | 34 | 32 | 20 | 31 | 11 | 4 |
| OTHER NON-EMPLOYED | 52 | 38 | 35 | 28 | 20 | 29 | 24 | 11 |
| FARMING | 52 | 21 | 29 | 23 | 20 | 18 | 22 | 11 |
| BY LEVEL OF EDUCATION | | | | | | | | |
| LOW | 53 | 31 | 35 | 26 | 18 | 27 | 18 | 9 |
| AVERAGE | 57 | 41 | 34 | 26 | 32 | 26 | 30 | 19 |
| HIGH | 63 | 47 | 28 | 37 | 34 | 22 | 19 | 20 |

2. INTEREST IN HOLIDAY LITERATURE

Clearly, holiday literature meets with considerable interest among the public; for some people it provides a decision-making tool, for others an escape into a fantasy world.

Question: "Whether you went away or not in 1985, did you ever during that year ...

EC 12

| | | |
|--|----|-----------|
| ... call in at a travel agent to pick up pamphlets and catalogues of possible holidays | 21 | |
| ... write to ask for brochures and prospectuses of holidays..... | 9 | 43%* |
| ... look through a holiday catalogue which you happened to see..... | 29 | |
| | | <u>57</u> |
| ... None of these things..... | | 100 |

*Some respondents did more than one of these things; altogether 43% did at least one.

Holiday brochures and catalogues appear to be distributed very widely. Not only do a considerable proportion of Europeans call in at travel agencies to pick up such literature, but even larger numbers look through catalogues when they come across them. This indicates a very high level of interest.

However, the pattern varies widely from one segment of the population to another and from country to country.

The tendency to take the initiative and call in on agencies for literature is strongest in the United Kingdom, Germany, The Netherlands and Luxembourg. The same applies to writing off for brochures and prospectuses. As well as these countries, there are others where catalogues are distributed widely, although it is much rarer for members of the public to take the initiative of seeking them: France and Italy.

In fact, the level of interest in holiday literature is closely correlated with the average proportion of the population taking holidays away from home per country, and even more closely with the proportion taking holidays abroad. But this is not to say that those who do not go away on holiday are not interested in such literature at all. While those who habitually stay at home do not often come into contact with these catalogues and brochures, the level of interest is higher among those who occasionally stay at home and rises steadily in line with the number of holiday trips taken during the year. Among those who went away twice or more often during 1985, two out of three had looked through holiday literature. A breakdown of the figures is given overleaf.

INTEREST IN HOLIDAY LITERATURE

Question: Whether you went away or not in 1985, did you ever during that year ...

- (a) call in at a travel agent to pick up pamphlets and catalogues of possible holidays?
- (b) write to ask for brochures and prospectuses of holidays?
- (c) look through a holiday catalogue which you happened to see?

| | (a) | (b) | (c) | TOTAL WHO DID AT LEAST ONE OF THE THREE |
|--------------------------------------|-----|-----|-----|---|
| BELGIQUE | 15 | 7 | 22 | 36 |
| DANMARK | 22 | 3 | 21 | 41 |
| DEUTSCHLAND | 30 | 13 | 37 | 59 |
| ELLAS | 4 | 2 | 12 | 15 |
| ESPAÑA | 8 | 2 | 11 | 18 |
| FRANCE | 12 | 8 | 37 | 43 |
| IRELAND | 17 | 3 | 19 | 32 |
| ITALIA | 17 | 6 | 33 | 40 |
| LUXEMBOURG | 31 | 11 | 30 | 54 |
| NEDERLAND | 30 | 16 | 37 | 58 |
| PORTUGAL | 5 | * | 9 | 13 |
| UNITED KINGDOM | 36 | 15 | 29 | 52 |
| EC 12 | 21 | 9 | 29 | 43 |
| BY EXPERIENCE OF HOLIDAYS | | | | |
| REGULARLY STAY AT HOME | 5 | 2 | 11 | 15 |
| OTHERS WHO STAYED AT HOME | 11 | 3 | 29 | 35 |
| WENT AWAY IN 85: | | | | |
| ONCE | 28 | 12 | 32 | 52 |
| TWICE | 37 | 16 | 43 | 64 |
| THREE TIMES OR MORE | 39 | 19 | 54 | 69 |

3. THE ATTRACTIVENESS OF COMMUNITY COUNTRIES

As was seen in the second part of this report, 1 in 5 of the Europeans who took holidays away from home went to some other country in the Community. We were then concerned only with those who did go away, and only with the year 1985.

Turning now to the population as a whole, let us look at Europeans' experience of Member States other than their own and the countries that they would prefer to visit or revisit.

Questions: "Here is a list of the 11 countries of the European Community other than your own. Which of these countries have you already been to, whether for holidays or any other reason?"

"From this list could you tell me the three countries that you would like best to go to or go back to?"

The first question refers to the respondents' lifetime **cumulative experience**. Altogether, over two-thirds of Europeans have been to at least one other Member State, but there is a very wide spread, running from 90% or more in Belgium, Denmark, Germany, Luxembourg and The Netherlands to below 25% in Greece. The number of countries visited also varies very considerably. In addition to nationality, two factors make for significant variations in experience of foreign countries: level of family income and, above all, level of education. (See table overleaf.)

EXPERIENCE OF OTHER COMMUNITY COUNTRIES

| | HAVE VISITED AT LEAST ONE OTHER COMMUNITY COUNTRY | AVERAGE NUMBER OF COUNTRIES VISITED |
|---|--|---|
| EC 12 | 69% | 3.11 |
| BY NATIONALITY (IN DECLINING ORDER OF FREQUENCY) | | |
| LUXEMBOURG | 99% | 5.27 |
| DUTCH | 96% | 4.52 |
| BELGIAN | 93% | 3.92 |
| GERMAN | 91% | 3.39 |
| DANISH | 90% | 3.54 |
| FRENCH | 79% | 2.89 |
| BRITISH | 75% | 3.50 |
| IRISH | 73% | 2.18 |
| PORTUGUESE | 53% | 1.75 |
| ITALIAN | 46% | 2.00 |
| SPANISH | 38% | 1.93 |
| GREEK | 24% | 2.56 |
| BY FAMILY INCOME | | |
| HIGH R + + | 79% | 3.71 |
| R + | 75% | 3.15 |
| R - | 66% | 2.85 |
| LOW R - - | 56% | 2.60 |
| BY LEVEL OF EDUCATION | | |
| LOW | 57% | 2.48 |
| AVERAGE | 80% | 3.23 |
| HIGH | 85% | 4.18 |

Overall, the Community countries most visited by Europeans are France, Spain and Italy, followed by Germany, Belgium and The Netherlands.

The second question was about respondents' **wish to visit European countries** other than their own, and the answers give an indication of the countries perceived as being most attractive. A maximum of three answers could be given. Almost all Europeans (91% on average) would like to visit other Community countries, and the average response was 2.6 countries. Even in those countries where those who have travelled abroad are still in the minority, interest in visiting other countries is very widespread (78% of respondents in Greece, 81% in Spain, 96% in Italy).

The countries considered attractive by the largest numbers of people are Greece, Spain, France and Italy, but all have their supporters. We shall return to this in due course.

Countries already visited (1)

| | |
|----------------|-----|
| France | 34% |
| Espana | 30% |
| Italia | 28% |
| Deutschland | 23% |
| Belgique | 22% |
| Nederland | 20% |
| Luxembourg | 15% |
| United Kingdom | 12% |
| Ellas | 11% |
| Danmark | 9% |
| Portugal | 7% |
| Ireland | 6% |
| None | 31% |

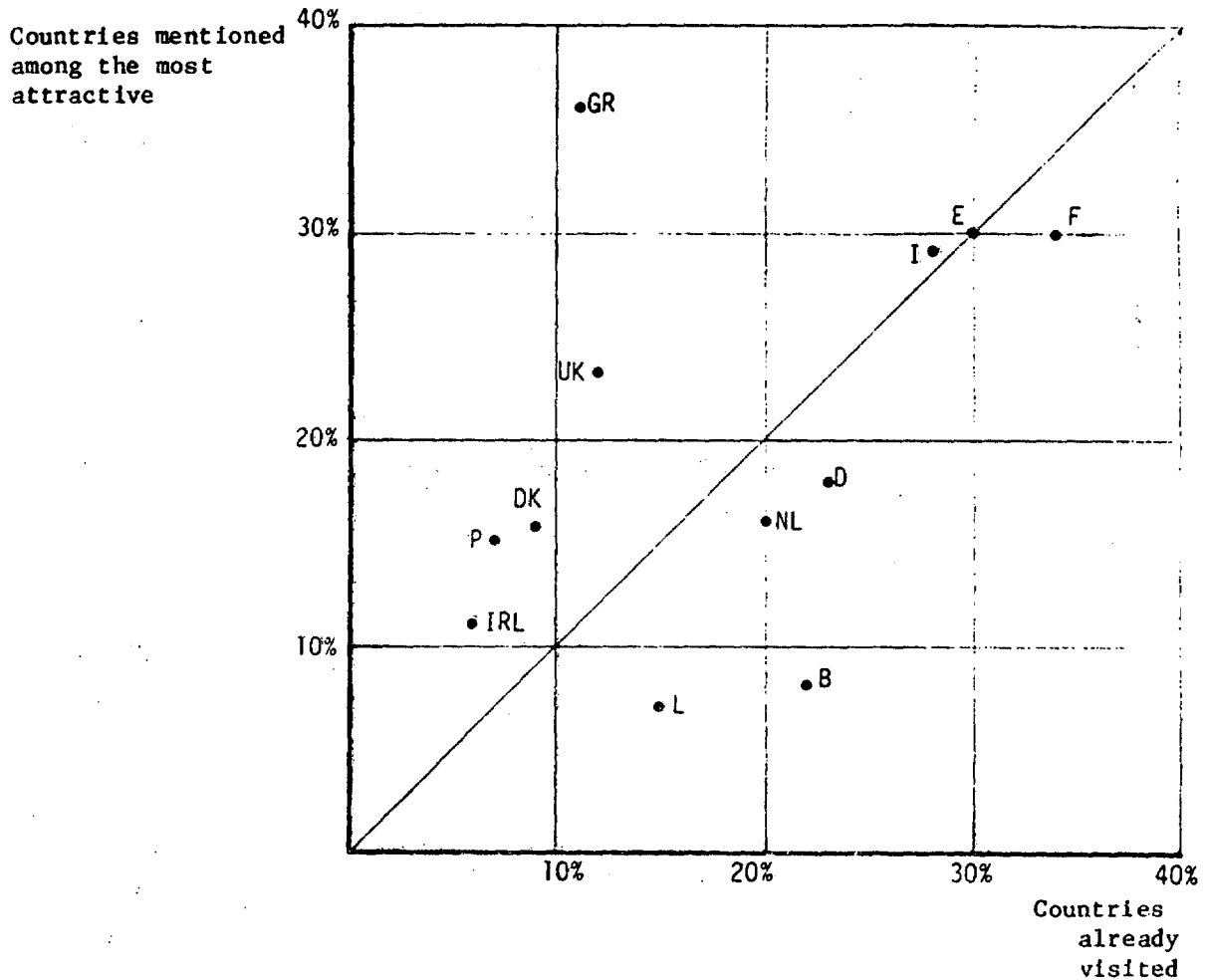
Most attractive countries (1)

| | |
|-------------------|-----|
| Ellas | 36% |
| Espana | 30% |
| France | 30% |
| Italia | 29% |
| United Kingdom | 23% |
| Deutschland | 18% |
| Nederland | 16% |
| Danmark | 16% |
| Portugal | 15% |
| Ireland | 11% |
| Belgique | 8% |
| Luxembourg | 7% |
| None or no answer | 9% |

The graph on page 78 provides a comparative view of the various countries' general positions, in terms both of the proportion of the population who have already visited them and of the proportion who would like to visit them or go there again.

(1) Key: Of all Europeans from other Community countries, 34% have already visited France, and 36% mention Greece among the three countries they would most like to visit or go back to.

COUNTRIES' POSITIONS
ACCORDING TO THE PROPORTION OF EUROPEANS WHO HAVE ALREADY VISITED THEM
AND THE PROPORTION MENTIONING THEM AMONG THE THREE MOST ATTRACTIVE



Each country's position on the X-axis is given by the proportion of Europeans who have already visited it, and its position on the Y-axis by the proportion of Europeans mentioning it among the three countries that they would most like to visit or go back to.

For example: Greece has already been visited by 11% and is classed by 36% of Europeans as one of the three most attractive countries as a holiday destination.

The Netherlands has already been visited by 20% and is classed by 16% of Europeans as one of the three most attractive countries.

Above the diagonal, the proportion of respondents mentioning a country as one of the most attractive is greater than the proportion who have already visited it.

Of course, the replies vary to a very marked extent according to the nationality of respondents. We can now analyse them in the light of this variable.

The tables on pages 80 and 81 provide breakdowns of the answers to the questions on countries already visited and countries considered attractive. They provide a considerable quantity of information, which may be of interest to the reader from either of two viewpoints:

- a nation as a source of tourist custom; experience of, and interest expressed in, each of the other countries;
- a country as a tourist destination; who from each of the nationalities has already visited this country, and who is attracted by it.

In the first table, the column headings represent countries previously visited, in declining order of total mentions by all European respondents, reading left to right: France, Spain, Italy etc. The lines across the table show the answers given by the various nationalities: Belgians, Danes etc. (For instance, 72% of the Belgians had previously been to France.)

In the second table, the column headings represent countries mentioned as attractive, in declining order of total mentions by all European respondents, reading left to right: the country receiving most mentions is Greece, followed by Spain and France, then Italy etc. The lines across the table show the answers given by the various nationalities: Belgians, Danes etc. (For instance, 24% of the Belgian respondents included Greece in their selection of the three most attractive countries.)

As this second table shows, the order of preference varies according to the nationality of the respondents. For instance, the Spanish find Italy more attractive than Greece.

The two tables are followed by comment on the various information that they contain.

COUNTRIES ALREADY VISITED

| EC 12 AND BY NATIONALITY | F | E | I | D | B | NL | L | UK | GR | DK | P | IRL |
|-----------------------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| EC | 34 | 30 | 28 | 23 | 22 | 20 | 15 | 12 | 11 | 9 | 7 | 6 |
| BELGIAN | 72 | 35 | 32 | 61 | /// | 65 | 66 | 19 | 8 | 2 | 3 | 3 |
| DANISH | 34 | 39 | 41 | 83 | 21 | 30 | 12 | 29 | 18 | /// | 8 | 4 |
| GERMAN | 49 | 39 | 54 | /// | 25 | 47 | 27 | 14 | 18 | 27 | 4 | 6 |
| GREEK | 8 | 3 | 10 | 16 | 5 | 5 | 2 | 8 | /// | 2 | 2 | 1 |
| SPANISH | 26 | /// | 9 | 6 | 5 | 3 | 2 | 5 | 2 | 1 | 17 | 1 |
| FRENCH | /// | 46 | 40 | 39 | 35 | 13 | 15 | 21 | 8 | 4 | 6 | 3 |
| IRISH | 27 | 24 | 11 | 8 | 6 | 5 | 2 | 69 | 7 | 3 | 6 | /// |
| ITALIAN | 32 | 14 | /// | 15 | 6 | 5 | 2 | 6 | 8 | 2 | 2 | 1 |
| LUXEMBOURG | 92 | 54 | 65 | 90 | 93 | 55 | /// | 29 | 17 | 14 | 10 | 6 |
| DUTCH | 59 | 41 | 43 | 81 | 79 | /// | 52 | 34 | 13 | 18 | 8 | 5 |
| PORTUGUESE | 20 | 50 | 5 | 6 | 4 | 3 | 2 | 3 | 1 | 1 | /// | 1 |
| BRITISH | 52 | 38 | 28 | 30 | 29 | 23 | 10 | /// | 16 | 8 | 11 | 18 |

For key, see footnote on page 77.

COUNTRIES MENTIONED AMONG THE THREE MOST ATTRACTIVE
(in declining order of the overall number of mentions - EC 12)

**EC 12 AND
 BY NATIONALITY**

| | GR | E | F | I | UK | D | NL | DK | P | IRL | B | L |
|------------|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|-----|
| EC | 36 | 30 | 30 | 29 | 23 | 18 | 16 | 16 | 15 | 11 | 8 | 7 |
| BELGIAN | 24 | 32 | 32 | 29 | 12 | 18 | 7 | 7 | 10 | 6 | /// | 14 |
| DANISH | 35 | 26 | 32 | 24 | 28 | 17 | 16 | /// | 11 | 9 | 4 | 3 |
| GERMAN | 35 | 44 | 41 | 35 | 16 | /// | 20 | 20 | 13 | 10 | 5 | 9 |
| GREEK | /// | 22 | 39 | 37 | 24 | 30 | 11 | 8 | 2 | 1 | 8 | 2 |
| SPANISH | 30 | /// | 27 | 49 | 24 | 22 | 20 | 14 | 8 | 8 | 9 | 6 |
| FRENCH | 53 | 28 | /// | 42 | 25 | 22 | 14 | 21 | 23 | 20 | 11 | 9 |
| IRISH | 22 | 33 | 36 | 27 | 33 | 22 | 7 | 7 | 12 | /// | 7 | 5 |
| ITALIAN | 40 | 53 | 46 | /// | 46 | 19 | 20 | 12 | 9 | 6 | 6 | 3 |
| LUXEMBOURG | 42 | 25 | 35 | 32 | 28 | 13 | 12 | 21 | 25 | 20 | 11 | /// |
| DUTCH | 42 | 22 | 38 | 23 | 31 | 20 | /// | 23 | 19 | 12 | 9 | 13 |
| PORTUGUESE | 22 | 16 | 45 | 31 | 39 | 32 | 20 | 10 | /// | 4 | 12 | 7 |
| BRITISH | 31 | 19 | 27 | 28 | /// | 24 | 16 | 16 | 23 | 13 | 8 | 4 |

For key, see footnote on page 77.

The content of the tables on pages 80 and 81 will now be summarized from two angles in turn, in the first of which the various nationalities will be viewed as potential tourists, while in the second the various countries will be viewed as holiday destinations.

NATIONALITIES AS POTENTIAL TOURISTS (listed in declining order of their experience of other Community countries)

The people of **Luxembourg** have virtually all (99%) visited at least one of the other Community countries (5.3 countries visited on average). The vast majority have been to all the neighbouring countries: Belgium, France and Germany. Over half have travelled to Italy, The Netherlands, Spain. The numbers to have visited the other countries are considerably smaller.

Current travel aspirations are largely focused on Greece, France and Italy, but there are also considerable numbers who would like to go to the United Kingdom, Portugal, Denmark or Ireland.

The **Dutch** are the nationality with the second highest proportion of the population to have travelled in Europe (96%, with an average of 4.5 countries already visited). Eight out of ten have been to Germany, the same is true of Belgium, and the next most popular country is France, followed by Luxembourg, Spain and Italy.

Greece, France and the United Kingdom are the countries they would most like to visit.

The **Belgians** have travelled a great deal in other Community countries (93%, with an average of 3.92 countries visited), especially the neighbouring countries: France, The Netherlands, Luxembourg and Germany. One in three has been to Italy, and a similar proportion to Spain. The numbers who have visited the other countries are much smaller.

The countries that the Belgians would most like to visit are France, Spain, Italy and then Greece.

The **Germans**: 91% have been to other Community countries (3.39 countries on average). About half have been to Italy, France and The Netherlands, and somewhat fewer to Spain. A higher proportion of Germans than of any other European nationality have been to Denmark (27%), and the proportion to have been to Greece is among the highest (18%).

The countries that Germans would most like to visit or go back to are Spain, France, Greece and Italy. On the other hand they are currently less interested than any other Europeans apart from the Belgians in visiting the United Kingdom.

The **Danish**: 90% have been to other Community countries (3.5 countries on average). Nearly all have been to Germany (83%). The numbers to have visited other countries are much smaller: about four in ten have been to Italy or Spain, three in ten to France, The Netherlands or the United Kingdom.

The countries that the Danes find most attractive are Greece and France, along with the United Kingdom, Spain and Italy.

The **French**: 79% have visited other Community countries (2.9 countries on average). About four in ten have been to Spain, Italy, Germany, Belgium. The French are much less familiar with the other countries; only two in ten have been to the United Kingdom.

Greece is the country which attracts by far the largest proportion of French people (53%), although only 8% have so far been there. Second, with 42%, comes Italy, which is familiar to many French people (40%). It is worth noting that French interest in Ireland (20%) is much higher than the European average.

The **British**: 75% have been to other Community countries (3.5 countries on average). France is the country most visited, with Spain in second place, and then Germany, Italy and Belgium roughly equal third. Despite their proximity, Ireland and The Netherlands have been visited by only one Briton in five.

The countries considered most attractive are Greece, then France and Italy, followed by Germany and Portugal.

The Irish: 73% have visited other Community countries (2.2 countries on average). Almost all those who have travelled have been to the United Kingdom (69%). One in four has been to France or Spain. Few have been to other countries.

The same three countries, France, Spain and the United Kingdom, are considered most attractive by the Irish, followed by Italy, Greece and Germany.

We come now to the European nationalities with much less experience of foreign travel to date.

The Portuguese: 53% have visited other Community countries (1.8 countries on average). Almost all of those who have been abroad (50% of the total) have been to Spain, and 20% have been to France. Very few have been to other countries. Despite this relatively limited experience, the Portuguese take an interest in other countries, and are most attracted by France, the United Kingdom, Germany and Italy.

The Italians: 46% have been to other Community countries (2 countries on average). France is the country visited by the largest proportion, followed by Germany and Spain some considerable distance behind. Few Italians have been to the other countries. They are strongly attracted by four countries: Spain, France, the United Kingdom and Greece.

The Spanish: 38% have visited other Community countries (1.9 countries on average). Most of this travel has been to the neighbouring countries: France and, to a lesser extent, Portugal. It is worth noting that the exchange of travellers between Spain and Portugal is very unevenly balanced: 50% of the Portuguese have been to Spain, but only 17% of the Spanish have visited Portugal. The Spanish find Italy by far the most attractive country (49%).

The **Greeks**: only 24% have been to other Community countries (an average of 2.5 countries visited for the small minority who have been abroad). At 16%, Germany is the only country visited by more than 10% of the Greek population. The countries that the Greeks find most attractive are France and Italy, followed by Germany.

COUNTRIES AS HOLIDAY DESTINATIONS. The information gathered on the various countries viewed as holiday destinations is summarized on the following pages, in the form of a "data sheet" for each country. The countries appear in declining order of the degree of interest shown in them, according to the returns for the Community as a whole.

BY NATIONALITY

| GREECE | Have already visited | Would like to visit |
|---------------|----------------------------|---------------------------|
| French | 8 | 53 |
| Dutch | 13 | 42 |
| Luxembourg | 17 | 42 |
| Italian | 8 | 40 |
| German | 18 | 35 |
| Danish | 18 | 35 |
| British | 16 | 31 |
| Spanish | 2 | 30 |
| Belgian | 8 | 24 |
| Irish | 7 | 22 |
| Portuguese | 1 | 22 |
| EC 12 | 11 | 36 |

G R E E C E

Although it has so far been visited by few people from the other Community countries, Greece emerges as the country found most attractive by Europeans overall and more especially by people in France, The Netherlands, Denmark, the United Kingdom and Luxembourg. Italy has a higher rating than Greece with the Spanish, and Spain and France with the Germans.

If everyone's holiday dreams were to come true, there would be an upsurge in Greece's tourist business.

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 11 | 33 |
| Female | 10 | 39 |
| Age | | |
| 15-24 | 8 | 46 |
| 25-39 | 14 | 44 |
| 40-54 | 11 | 33 |
| 55+ | 9 | 24 |
| Family income | | |
| High R + + | 16 | 44 |
| R + | 12 | 41 |
| R - | 9 | 34 |
| Low R - - | 7 | 28 |
| Education | | |
| Low - | 5 | 28 |
| = | 13 | 33 |
| + | 23 | 46 |

Of the small number of people who have already visited Greece, over half would like to go back; no other country achieved such a high "fidelity rating".

In terms of sociodemographic profile, interest in visiting Greece is particularly strong among women, young people (under 40), the better educated and the better off.

S P A I N

BY NATIONALITY

| SPAIN | Have already visited | Would like to visit |
|------------|----------------------------|---------------------------|
| Italian | 14 | 53 |
| German | 39 | 44 |
| Irish | 24 | 33 |
| Belgian | 35 | 32 |
| French | 46 | 28 |
| Danish | 39 | 26 |
| Luxembourg | 54 | 25 |
| Dutch | 41 | 22 |
| Greek | 3 | 22 |
| British | 38 | 19 |
| Portuguese | 50 | 16 |
| EC 12 | 30 | 30 |

Spain has been visited by 30% of the European population, a proportion exceeded in the case of France only. Except among the Greeks and Italians, the proportions of respondents who had been to Spain were high in all countries.

The same proportion of Europeans overall (30%) included Spain among the countries that they would most like to visit or go back to. The keenest interest in this country was found among Germans, many of whom have already visited it, and, to an even more marked degree, among Italians who want to see it for the first time.

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 32 | 30 |
| Female | 29 | 31 |
| Age | | |
| 15-24 | 28 | 32 |
| 25-39 | 36 | 30 |
| 40-54 | 32 | 32 |
| 55+ | 26 | 28 |
| Family income | | |
| High R + + | 39 | 30 |
| R + | 35 | 34 |
| R - | 27 | 32 |
| Low R - - | 20 | 29 |
| Education | | |
| Low - | 21 | 29 |
| = | 38 | 34 |
| + | 43 | 24 |

Two-thirds of those who want to go to Spain have never been there before.

Interest in Spain is more or less evenly spread through all segments.

BY NATIONALITY

| FRANCE | Have already visited | Would like to visit |
|---------------|----------------------------|---------------------------|
| Italian | 32 | 46 |
| Portuguese | 20 | 45 |
| German | 49 | 41 |
| Greek | 8 | 39 |
| Dutch | 59 | 38 |
| Irish | 27 | 36 |
| Luxembourg | 92 | 35 |
| Belgian | 72 | 32 |
| Danish | 34 | 32 |
| British | 52 | 27 |
| Spanish | 26 | 27 |
| EC 12 | 34 | 30 |

FRANCE

France is the Community country most visited so far by nationals of other Member States, of whom an average of one in three has already been there. In the rating of countries according to their attractiveness, it comes equal second with Spain behind Greece.

The Italians, Portuguese and Germans are particularly strongly attracted to France. However, the very lowest rating is as high as 27%, something which cannot be said of any other country.

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 38 | 30 |
| Female | 31 | 30 |
| Age | | |
| 15-24 | 36 | 34 |
| 25-39 | 37 | 27 |
| 40-54 | 35 | 32 |
| 55+ | 31 | 29 |
| Family income | | |
| High R + + | 44 | 35 |
| R + | 36 | 27 |
| R - | 29 | 29 |
| Low R - - | 24 | 30 |
| Education | | |
| Low - | 25 | 30 |
| = | 40 | 29 |
| + | 51 | 33 |

While the more educated and highly paid are very strongly represented among those who have already visited France, there is a fairly even spread across all segments of the population among those who would like to visit or go back to this country.

Of those who have already been to France, four out of ten still include it among the three countries that they would like to visit or go back to.

BY NATIONALITY

| ITALY | Have already visited | Would like to visit |
|--------------|----------------------------|---------------------------|
| Spanish | 9 | 49 |
| French | 40 | 42 |
| Greek | 10 | 37 |
| German | 54 | 35 |
| Luxembourg | 65 | 32 |
| Portuguese | 5 | 31 |
| Belgian | 32 | 29 |
| British | 28 | 28 |
| Irish | 11 | 27 |
| Danish | 41 | 24 |
| Dutch | 43 | 23 |
| EC 12 | 28 | 29 |

I T A L Y

Italy ranks third among the Community countries visited by most nationals of the other Member States, and fourth among those that they would most like to visit or go back to.

Among those who have already been to Italy, four out of ten still include it among the three countries that they would like to visit or revisit. This fidelity rating is second only to Greece's.

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 29 | 28 |
| Female | 27 | 30 |
| Age | | |
| 15-24 | 24 | 34 |
| 25-39 | 30 | 31 |
| 40-54 | 29 | 28 |
| 55+ | 27 | 25 |
| Family income | | |
| High R + + | 39 | 29 |
| R + | 30 | 31 |
| R - | 25 | 30 |
| Low R - - | 17 | 25 |
| Education | | |
| Low - | 18 | 25 |
| = | 34 | 33 |
| + | 44 | 34 |

The sociodemographic breakdown shows that the tendency to choose Italy is strongest among young people and the more highly educated.

BY NATIONALITY

| UNITED KINGDOM | Have already visited | Would like to visit |
|-----------------------|----------------------------|---------------------------|
| Italian | 6 | 46 |
| Portuguese | 3 | 39 |
| Irish | 69 | 33 |
| Dutch | 34 | 31 |
| Luxembourg | 29 | 28 |
| Danish | 29 | 28 |
| French | 21 | 25 |
| Spanish | 5 | 24 |
| Greek | 8 | 24 |
| German | 14 | 16 |
| Belgian | 19 | 12 |
| EC 12 | 12 | 23 |

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 12 | 24 |
| Female | 11 | 21 |
| Age | | |
| 15-24 | 12 | 30 |
| 25-39 | 15 | 24 |
| 40-54 | 10 | 23 |
| 55+ | 9 | 16 |
| Family income | | |
| High R + + | 20 | 28 |
| R + | 12 | 22 |
| R - | 8 | 23 |
| Low R - - | 7 | 21 |
| Education | | |
| Low - | 4 | 21 |
| - | 14 | 23 |
| + | 29 | 27 |

UNITED KINGDOM

The proportion of those who have so far visited the United Kingdom is less than one-third among people from Denmark, Luxembourg and The Netherlands, and barely a fifth among the Belgians and French; the Irish are the exceptions (almost all of those who have been abroad have been to the United Kingdom).

The United Kingdom is one of the four countries which many more people would like to visit than have so far done so. In particular, it is considered very attractive by the Italians and Portuguese, although very few of them have yet visited it. In fact, in the ranking of the most attractive countries, the United Kingdom never comes first but is placed second by the Italians (after Spain), the Portuguese (after France) and the Irish (after France, and equal with Spain).

The sociological breakdown shows strongest interest in the United Kingdom among young people (aged 15 to 24), the more highly educated and the better off.

BY NATIONALITY

| GERMANY | Have already visited | Would like to visit |
|----------------|----------------------------|---------------------------|
| Portuguese | 6 | 32 |
| Greek | 16 | 30 |
| British | 30 | 24 |
| French | 39 | 22 |
| Irish | 8 | 22 |
| Spanish | 6 | 22 |
| Dutch | 81 | 20 |
| Italian | 15 | 19 |
| Belgian | 61 | 18 |
| Danish | 83 | 17 |
| Luxembourg | 90 | 13 |
| EC 12 | 23 | 18 |

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 28 | 22 |
| Female | 19 | 13 |
| Age | | |
| 15-24 | 19 | 18 |
| 25-39 | 27 | 17 |
| 40-54 | 24 | 18 |
| 55+ | 22 | 17 |
| Family income | | |
| High R + + | 31 | 17 |
| R + | 25 | 18 |
| R - | 18 | 17 |
| Low R - - | 20 | 20 |
| Education | | |
| Low - | 16 | 19 |
| = | 26 | 16 |
| + | 39 | 17 |

GERMANY

The overall proportion of Federal Germany's immediate neighbours who have visited the country is very high, the only exception being the French.

The Portuguese in particular and the Greeks show the greatest interest in visiting this country or going back there.

Of those who have already been to Germany, only a quarter expressed a wish to return, a rather low figure.

According to the sociological breakdown, interest in Germany is very evenly spread through all groups, and it is worth pointing out that interest is at least as strong among people from a modest background as among others, something which is quite rare. More specifically, of all occupational groups, farmers showed the strongest interest in visiting Germany (26% included it in their three countries).

BY NATIONALITY

| NETHERLANDS | Have already visited | Would like to visit |
|--------------------|----------------------------|---------------------------|
| German | 47 | 20 |
| Italian | 5 | 20 |
| Spanish | 3 | 20 |
| Portuguese | 3 | 20 |
| Danish | 30 | 16 |
| British | 23 | 16 |
| French | 13 | 14 |
| Luxembourg | 55 | 12 |
| Greek | 5 | 11 |
| Belgian | 65 | 7 |
| Irish | 5 | 7 |
| EC 12 | 20 | 17 |

NETHERLANDS

Apart from its immediate neighbours (from Belgium, Germany, Luxembourg and, to a lesser degree, Denmark), few people from the Community have so far visited The Netherlands.

The strongest interest in this country was shown by Germans, Italians, Spaniards and Portuguese.

Interest in visiting The Netherlands is very evenly spread through all socio-demographic groups.

BY SOCIO-DEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 22 | 17 |
| Female | 18 | 16 |
| Age | | |
| 15-24 | 14 | 16 |
| 25-39 | 22 | 18 |
| 40-54 | 22 | 16 |
| 55+ | 20 | 16 |
| Family income | | |
| High R + + | 25 | 19 |
| R + | 23 | 19 |
| R - | 18 | 15 |
| Low R - - | 12 | 13 |
| Education | | |
| Low - | 15 | 16 |
| = | 23 | 17 |
| + | 28 | 18 |

BY NATIONALITY

| DENMARK | Have already visited | Would like to visit |
|----------------|----------------------------|---------------------------|
| Dutch | 18 | 23 |
| Luxembourg | 14 | 21 |
| French | 4 | 21 |
| German | 27 | 20 |
| British | 8 | 16 |
| Spanish | 1 | 14 |
| Italian | 2 | 12 |
| Portuguese | 1 | 10 |
| Greek | 2 | 8 |
| Irish | 3 | 7 |
| Belgian | 2 | 7 |
| EC 12 | 9 | 16 |

DENMARK

Relatively few Europeans have so far visited Denmark, and very few of those who do not live in neighbouring countries.

In comparison, the numbers of potential visitors are appreciable (particularly among the French, 4% of whom have been to Denmark and 21% would like to go; also among the Spanish, Italians and Portuguese).

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 10 | 17 |
| Female | 8 | 15 |
| Age | | |
| 15-24 | 7 | 15 |
| 25-39 | 9 | 20 |
| 40-54 | 11 | 16 |
| 55+ | 9 | 13 |
| Family income | | |
| High R + + | 13 | 21 |
| R + | 10 | 17 |
| R - | 9 | 14 |
| Low R - - | 5 | 13 |
| Education | | |
| Low - | 6 | 14 |
| = | 11 | 17 |
| + | 15 | 22 |

Interest in Denmark is markedly stronger among the better off and better educated.

BY NATIONALITY

| PORTUGAL | Have already visited | Would like to visit |
|-----------------|----------------------------|---------------------------|
| Luxembourg | 10 | 25 |
| British | 11 | 23 |
| French | 6 | 23 |
| Dutch | 8 | 19 |
| German | 4 | 13 |
| Irish | 6 | 12 |
| Danish | 8 | 11 |
| Belgian | 3 | 10 |
| Italian | 2 | 9 |
| Spanish | 17 | 8 |
| Greek | 2 | 2 |
| EC 12 | 7 | 15 |

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 8 | 15 |
| Female | 6 | 14 |
| Age | | |
| 15-24 | 4 | 14 |
| 25-39 | 9 | 16 |
| 40-54 | 7 | 16 |
| 55+ | 6 | 13 |
| Family income | | |
| High R + + | 10 | 17 |
| R + | 6 | 16 |
| R - | 5 | 13 |
| Low R - - | 4 | 13 |
| Education | | |
| Low - | 4 | 12 |
| = | 8 | 16 |
| + | 12 | 17 |

P O R T U G A L

Portugal is roughly equal with Ireland as the country so far least visited by people from other Community countries. Even among the Spanish, only 17% have visited Portugal (whereas 50% of the Portuguese have been to Spain).

In comparison, the proportion of Europeans including Portugal among the three countries that they would most like to visit or go back to is quite high. The strongest interest in Portugal was found in Luxembourg, the United Kingdom and France.

The attraction of Portugal is slightly stronger among the more highly educated and those with above-average incomes.

BY NATIONALITY

| IRELAND | Have already visited | Would like to visit |
|----------------|----------------------------|---------------------------|
| French | 3 | 20 |
| Luxembourg | 6 | 20 |
| British | 18 | 13 |
| Dutch | 5 | 12 |
| German | 6 | 10 |
| Danish | 4 | 9 |
| Spanish | 1 | 8 |
| Belgian | 3 | 6 |
| Italian | 1 | 6 |
| Portuguese | 1 | 4 |
| Greek | 1 | 1 |
| EC 12 | 6 | 11 |

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 7 | 12 |
| Female | 5 | 10 |
| Age | | |
| 15-24 | 4 | 13 |
| 25-39 | 7 | 13 |
| 40-54 | 6 | 10 |
| 55+ | 5 | 7 |
| Family income | | |
| High R + + | 8 | 14 |
| R + | 6 | 12 |
| R - | 5 | 11 |
| Low R - - | 4 | 7 |
| Education | | |
| Low - | 4 | 7 |
| = | 7 | 13 |
| + | 9 | 19 |

I R E L A N D

Of all Community countries, Ireland, jointly with Portugal, has so far been visited least by people from other Member States. Even among the British, only 18% have been to Ireland.

For most Europeans, therefore, Ireland is a country yet to be discovered. And one in ten of them, on average, puts Ireland among the three most attractive Community countries. However, there is a very wide spread on either side of this average figure.

It seems that France currently offers the largest pool of potential visitors to Ireland: 20% of the French respondents included this country among the three that they would most like to visit, although only 3% had been there.

The highest level of interest in Ireland was found among people with a high level of education.

BY NATIONALITY

| BELGIUM | Have already visited | Would like to visit |
|----------------|----------------------------|---------------------------|
| Portuguese | 4 | 12 |
| Luxembourg | 93 | 11 |
| French | 35 | 11 |
| Dutch | 79 | 9 |
| Spanish | 5 | 9 |
| British | 29 | 8 |
| Greek | 5 | 8 |
| Irish | 6 | 7 |
| Italian | 6 | 6 |
| German | 25 | 5 |
| Danish | 21 | 4 |
| EC 12 | 22 | 8 |

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 25 | 8 |
| Female | 19 | 7 |
| Age | | |
| 15-24 | 19 | 6 |
| 25-39 | 23 | 7 |
| 40-54 | 23 | 7 |
| 55+ | 23 | 9 |
| Family income | | |
| High R + + | 29 | 6 |
| R + | 25 | 8 |
| R - | 20 | 8 |
| Low R - - | 17 | 9 |
| Education | | |
| Low - | 15 | 9 |
| = | 24 | 6 |
| + | 39 | 7 |

BELGIUM

This country has been visited by the great majority of its neighbours in Luxembourg and The Netherlands, but by many fewer of its French neighbours (only 35% of the French have been to Belgium, whereas 72% of Belgians have visited France). Among other Europeans, relatively few have been to Belgium; the Germans are a particular case in point.

Few respondents included Belgium among the countries that they would most like to visit (8% on average, the highest rating being 12% from the Portuguese).

Most of those who had already been to Belgium were inclined to choose other countries, so that the small minority interested in visiting Belgium in future had not done so previously. These would thus be first-time visitors.

Those who expressed an interest in Belgium were evenly spread through all groups, although the figures were slightly higher among the more elderly and those from modest backgrounds.

BY NATIONALITY

| LUXEMBOURG | Have already visited | Would like to visit |
|-------------------|----------------------------|---------------------------|
| Belgian | 66 | 14 |
| Dutch | 52 | 13 |
| German | 27 | 9 |
| French | 15 | 9 |
| Portuguese | 2 | 7 |
| Spanish | 2 | 6 |
| Irish | 2 | 5 |
| British | 10 | 4 |
| Danish | 12 | 3 |
| Italian | 2 | 3 |
| Greek | 2 | 2 |
| EC 12 | 15 | 7 |

LUXEMBOURG

Considering the tiny size of this country, it is quite remarkable that 7% of other Europeans included it among the three countries that they would most like to visit or go back to, out of a list of eleven countries altogether.

BY SOCIODEMOGRAPHIC GROUP

| (EC 12) | Have already visited | Would like to visit |
|----------------------|----------------------------|---------------------------|
| Sex | | |
| Male | 17 | 7 |
| Female | 13 | 6 |
| Age | | |
| 15-24 | 13 | 5 |
| 25-39 | 15 | 6 |
| 40-54 | 18 | 8 |
| 55+ | 14 | 8 |
| Family income | | |
| High R + + | 21 | 4 |
| R + | 18 | 8 |
| R - | 14 | 8 |
| Low R - - | 10 | 5 |
| Education | | |
| Low - | 9 | 7 |
| = | 19 | 6 |
| + | 25 | 6 |

TECHNICAL ANNEX

LIST OF THE INSTITUTES WHICH CARRIED OUT THE SURVEY
SAMPLING METHOD
THE QUESTIONNAIRE USED

INSTITUTS CHARGES DU SONDAGE ET SPECIALISTES RESPONSABLES /

INSTITUTES WHICH CARRIED OUT THE SURVEY AND EXPERTS IN CHARGE (*)

| | | |
|--------------------|---|--|
| BELGIQUE/BELGIE | DIMARSO N.V. rue des Colonies, 54, B-1000 Bruxelles Tél.: 02/219.24.08 | Nicole JANAR |
| DANMARK | GALLUP MARKEDSANALYSE A/S Gammel Vartov Vej 6, DK-2900 Hellerup Tél.: 01/29.88.00 | Rolf RANDRUP |
| DEUTSCHLAND | ERNID-INSTITUT GmbH Bodelschwinghstraße, 23-25a D-4800 Bielefeld 1 Tél.: 0521/260.010 | Walter TACKE Klaus-Peter SCHOEPPNER Heidrun BODE |
| ELLAS | ICAP-HELLAS S.A. Vas. Sophias, 64, GR-Athinai 615 Tél.: 01/7225.651 | Anthony LYKIARDOPOULOS Tilenachos DIB |
| ESPANA | Instituto de Investigacion GALLUP c/Avala, 6. 6º D. 28001 - MADRID - Tél.: (1)431.07.46 | Jorge J. MIQUEL CALATAYUD Luis PAMBLANCO |
| FRANCE | INSTITUT DE SONDAGES LAVIALLE 6-8, rue du 4-Septembre F-92130 Issy-les-Moulineaux Tél.: 1/45.54.97.11 | Albert LAVIALLE Florence FABRE |
| IRELAND | IRISH MARKETING SURVEYS Ltd 19-20 Upper Pembroke Street IRL-Dublin 2 Tél.: 1/76.11.96 | Charles COYLE |
| ITALIA | ISTITUTO PER LE RICERCHE STATISTICHE E L'ANALISI DELL'OPINIONE PUBBLICA (DOXA) Galleria San Carlo, 6 I-20122 Milano Tél.: 02/790.871 | Ennio SALAMON Alfonso del RE |
| LUXEMBOURG | INSTITUT LUXEMBOURGEOIS DE RECHERCHES SOCIALES (ILRES) 6, rue du Marché-aux-Herbes GD-Luxembourg Tél.: 0352/47.50.21 | Louis MEVIS Edmée MEVIS |
| NEDERLAND | NEDERLANDS INSTITUUT VOOR DE PUBLIEKE OPINIE (NIPO) B.V. Barentzplein, 7, NL-1013 NJ Amsterdam Tél.: 020/24.88.44 | Arnold WEIJTLANDT Martin JONKER |
| PORTUGAL | NORMA - Sociedade de Estudos para o Desenvolvimento de Empresas, S.A.R.L. Avenida 5 de Outubro, 122-8º P-1000 Lisboa Tél.: 1/76.76.04 | J.A. VIDAL de OLIVEIRA |
| UNITED KINGDOM (→) | SOCIAL SURVEYS (GALLUP POLL) 202 Finchley Road, UK-LONDON NW3 6BL Tél.: 01/794.04.61 | Norman WEBB Robert WYBROW |
| FRANCE | Coordination internationale FAITS ET OPINIONS 25, rue Cambon F-75001 PARIS Tél.: 1/42.96.41.65 | Hélène RIFFAULT Jean-François TCHERNIA |

ECHANTILLONNAGE / SAMPLING

L'objectif de la méthode d'échantillonnage est de couvrir de façon représentative la totalité de la population des dix pays de la Communauté âgée de 15 ans et plus.

L'échantillon de chaque pays est constitué à deux niveaux:

1° Régions et localités d'enquête

Les statistiques de la Communauté européenne divisent l'espace européen en 117 régions.

L'enquête a lieu dans 115 régions (Corse et Val d'Aoste exceptés).

Chaque pays a constitué aléatoirement un échantillon-maître de localités d'enquête de telle sorte que toutes les catégories d'habitat soient représentées proportionnellement à leurs populations respectives.

Au total, les interviews de l'enquête Omnibus Européenne ont lieu dans environ 1 150 points d'enquête.

2° Choix des personnes interrogées

Les personnes interrogées sont toujours différentes d'une enquête à l'autre. L'échantillon-maître aléatoire évoqué ci-dessus indique le nombre de personnes à interroger à chaque point d'enquête. Au stade suivant, les personnes à interroger sont désignées:

- soit par un tirage au sort sur liste dans les pays où on peut avoir accès à des listes exhaustives d'individus ou de foyers: Belgique, Pays-Bas, Danemark, Luxembourg;
- soit par échantillonnage stratifié sur la base des statistiques de recensement, l'échantillon étant construit à partir des critères de sexe, âge et profession: France, Italie, Royaume-Uni, Irlande, Allemagne;
- soit par une méthode combinant les deux précédentes (cheminement systématique): Grèce.

The sample has been designed to be representative of the total population aged 15 years and over of the ten countries of the Community.

In each country a two stage sampling method is used:

1° Geographical distribution

For statistical purposes the European Community divides Europe into 117 regions.

The survey takes place in 115 of these regions (Corsica and Val D'aoste excluded).

In each country a random selection of sampling points is made in such a way that all types of area (urban, rural, etc.) are represented in proportion to their populations.

The interviews are distributed in more or less 1 150 sampling points.

2° Choice of respondents

For each survey different individuals are interviewed in the master sample of sampling point described above. Within these sampling points the individuals to be interviewed are chosen:

- either at random from the population or electoral lists in those countries where access to suitable lists of individuals or households is possible: Belgium, Denmark, Netherlands, Luxembourg;
- or by quota sampling. In these cases the quotas are established by sex, age and occupation on the basis of census data: this system is used in France, Italy, United-Kingdom, Ireland and Germany;
- or by a method combining the two precedent ones ("random route"): Greece.

PLRIODES D'ENQUETE ET NOMBRE D'INTERVIEWS

| | Population (1) | | | Echantillons/ Samples (2) (Euro-Baromètre n° 25) | Dates (Euro-Baromètre n° 25) |
|----------|-----------------------------|---------------|---------------|--|---------------------------------|
| | Milliers /Thou- sands | % CE/EC 10 | % CE/EC 12 | | |
| B | 7 924 | 3.64 | 3.12 | 1 008 | 28/III-14/III/1986 |
| DK | 4 133 | 1.90 | 1.62 | 1 043 | 20-30/III |
| D | 51 466 | 23.62 | 20.26 | 987 | 24/III-30/IV |
| GR | 7 715 | 3.54 | 3.04 | 1 000 | 21/III-12/IV |
| F | 42 851 | 19.67 | 16.87 | 1 003 | 31/III-25/IV |
| IRL | 2 455 | 1.13 | .97 | 1 002 | 27/III-11/IV |
| I | 44 438 | 20.39 | 17.49 | 1 106 | 20/III-11/IV |
| L | 300 | .14 | .12 | 299 | 28/III-21/IV |
| NL | 11 400 | 5.23 | 4.49 | 1 001 | 26/III-4/IV |
| UK | 45 207 | 20.75 | 17.79 | 1 383 | 20/III-11/IV |
| CE/EC 10 | 217 889 | 100.00 | 85.77 | 9 832 | 20/III-30/IV |
| E | 28 854 | - | 11.36 | 1 008 | 19/III-6/IV |
| P | 7 314 | - | 2.88 | 1 000 | 21/III-14/IV |
| CE/EC 12 | 254 057 | - | 100.00 | 11 840 | 19/III-30/IV |

Il est rappelé que les résultats obtenus par sondage sont des estimations dont le degré de certitude et de précision dépend, toutes choses égales d'ailleurs, du nombre des individus constituant l'échantillon. Avec des échantillons de l'ordre de 1 000, on admet généralement qu'une différence inférieure à cinq pour cent entre deux pourcentages est au-dessous du niveau acceptable de confiance.

Readers are reminded that sample survey results are estimations, the degree of certainty and precision of which, everything being kept equal, rests upon the number of cases. With samples of about 1 000, it is generally admitted that a percentage difference of less than five per cent is below the acceptable level of confidence.

(1) 15 ans et plus. / 15 years and over.

(2) Nombre d'interviews. / Number of interviews.

QUESTIONNAIRE

131. En pensant aux douze mois de l'année 1985 (MONTRER LE CALENDRIER), pouvez-vous me dire si vous êtes parti une ou plusieurs fois en vacances pour quatre jours ou davantage hors de votre domicile, et à quelles périodes ? (SI UN SEJOUR EST A CHEVAL SUR DEUX MOIS, COCHER LE MOIS DU DEPART. REPONSES MULTIPLES POSSIBLES)

Blank. Jamais parti pour quatre jours ou plus en 1985

- 1. Parté en Janvier
- 2. " Février
- 3. " Mars
- 4. " Avril
- 5. " Mai
- 6. " Juin
- 7. " Juillet
- 8. " Août
- 9. " Septembre
- 0. " Octobre
- 1. " Novembre
- 2. " Décembre

132. Donc, au total en 1985, vous êtes parti pour quatre jours ou davantage ...

- 1. Aucune fois
- 2. Une fois
- 3. Deux fois
- 4. Trois fois
- 5. Quatre fois ou plus

POUR CEUX QUI NE SONT PAS PARTIS QUATRE JOURS OU PLUS EN 1985 : POSER 133, 134, 135.

133. Pour quelles raisons n'êtes-vous pas parti en 1985 ? (REPONSES MULTIPLES POSSIBLES)

- 1. Vous préférez rester chez vous
- 2. Vous n'avez pas pu vous absenter pour raison de travail
- 3. Vous n'aviez pas les moyens
- 4. Raison exceptionnelle (mauvaise santé, déménagement, raisons familiale etc...)
- 5. Crainte d'actions terroristes, insécurité
- 6. Autre

134. Et l'année précédente, (1984) étiez-vous parti en vacances pour quatre jours ou davantage ?

- 1. Oui
- 2. Non
- 0. ?

135. Et, dans les douze mois qui viennent, pensez-vous que vous partirez en vacances pour quatre jours ou davantage ?

- 1. Oui
- 2. Non
- 0. ?

POUR CEUX QUI NE SONT PAS PARTIS, PASSER ENSUITE A LA Q. 136.

131. Thinking about last year, (from January to December 1985) (SHOW CALENDAR), did you go away on a holiday trip lasting at least four days away? Perhaps you did this more than once. Could you please tell me the month or months you went away (IF A HOLIDAY TRIP STARTS IN ONE MONTH AND ENDS IN ANOTHER INDICATE MONTH OF DEPARTURE, THERE CAN BE MORE THAN ONE RESPONSE).

Blank. Did not go away four days or more in 1985

- 1. Away in January
- 2. " February
- 3. " March
- 4. " April
- 5. " May
- 6. " June
- 7. " July
- 8. " August
- 9. " September
- 0. " October
- 1. " November
- 2. " December

132. So, altogether you made how many holiday trips, each lasting four days or more in 1985 ...

- 1. None
- 2. One
- 3. Two
- 4. Three
- 5. Four or more

FOR THOSE WHO DID NOT GO AWAY ON A HOLIDAY OF FOUR DAYS OR MORE IN 1985 ASK 133, 134, 135

133. Why didn't you go away in 1985? (MULTIPLE ANSWERS POSSIBLE)

- 1. You preferred to stay at home
- 2. You were not able to get away from work
- 3. You couldn't afford it
- 4. Special reasons (your health, moving house, family reasons etc)
- 5. Worry about safety, terrorists, etc
- 6. Others

134. And the previous year, (1984) did you go away on holiday at least once for four days or more?

- 1. Yes
- 2. No
- 0. ?

135. And during the next twelve months, do you think you will take a holiday trip of at least four days?

- 1. Yes
- 2. No
- 0. ?

FOR THOSE WHO DID NOT GO AWAY IN 1985, GO TO Q. 136

Mercredi 12 Mars 1986
QUESTIONNAIRE EURO 25

- 3 -

AUX PERSONNES QUI SONT PARTIES AU MOINS UNE FOIS EN 1985 :
136/ Parlons maintenant de ces vacances 1985. (SI VOUS ETES PARTI
157. PLUSIEURS FOIS, nous commencerons par vos vacances principales
et ensuite un de vos autres déplacements de vacances en 1985, à
votre choix).

| | Vacances principales | Autres vacances | |
|---|--------------------------|-------------------------------------|--|
| 136. A quelle période êtes-vous parti? (N° du mois selon les mêmes code que Q. 132) | <input type="checkbox"/> | (147) <input type="checkbox"/> | |
| 137/8 Combien de jours au total ? | <input type="checkbox"/> | (148/9) <input type="checkbox"/> | |
| 139. Combien de personnes étiez vous pour ces vacances, y compris les enfants ? | <input type="checkbox"/> | (150) <input type="checkbox"/> | |
| 140. Etiez-vous... (MONTRER LA LISTE - REPONSES MULTIPLES POSSIBLES) | | | |
| dans (votre pays)..... | 1 | 1 (151) | |
| dans un autre pays de la Communauté européenne..... | 2 | 2 | |
| ailleurs en Europe (Suisse, Autriche, Scandinavie, U.R.S.S., etc.....) | 3 | 3 | |
| hors d'Europe (Amérique, Asie, Afrique, etc.....) | 4 | 4 | |
| 141. Etes-vous resté toujours installé au même endroit ou était-ce un circuit ? | | | |
| Même endroit..... | 1 | 1 (152) | |
| Circuit..... | 2 | 2 | |
| 142. Etait-ce... (REPONSES MULTIPLES) | | | |
| à la campagne..... | 1 | 1 (153) | |
| en montagne..... | 2 | 2 | |
| dans une (ou plusieurs) villes..... | 3 | 3 | |
| au bord de la mer..... | 4 | 4 | |
| 143. Quels moyens de transports avez-vous utilisés ? (REPONSES MULTIPLES) | | | |
| Voiture..... | 1 | 1 (154) | |
| Train..... | 2 | 2 | |
| Avion..... | 3 | 3 | |
| Bateau..... | 4 | 4 | |
| Bicyclette/moto..... | 5 | 5 | |
| Autre..... | 6 | 6 | |
| 144. Quels modes d'hébergement avez-vous utilisés ? (REPONSES MULTIPLES) | | | |
| Hôtel, pension, motel..... | Y | Y (155) | |
| Location..... | X | X | |
| Résidence secondaire..... | 0 | 0 | |
| Chez des parents ou amis..... | 1 | 1 | |
| Chez l'habitant..... | 2 | 2 | |
| Camping, caravanning..... | 3 | 3 | |
| Village de vacances..... | 4 | 4 | |
| Auberge de jeunesse..... | 5 | 5 | |
| Bateau/croisière..... | 6 | 6 | |
| Autre..... | 7 | 7 | |
| 145. Ces vacances étaient-elles organisées... | | | |
| par une agence de voyages (voyage à forfait, tour organisé)..... | 1 | 1 (156) | |
| par une agence de voyages (pour vos réservations seulement)..... | 2 | 2 | |
| par une association ou un groupement dont vous faites partie..... | 3 | 3 | |
| par vous (ou la famille) sans l'intermédiaire d'une agence..... | 4 | 4 | |
| 146. Si vous deviez mettre une note de 1 à 10 pour exprimer la satisfaction que vous avez retirée de ces vacances, quelle serait cette note ? | <input type="checkbox"/> | (157) <input type="checkbox"/> | |

(POUR LA NOTE 10, (TOUT A FAIT SATISFAIT), NOTER X)

Mercredi 12 Mars 1986
QUESTIONNAIRE EURO 25

- 3 -

FOR PEOPLE WHO TOOK A HOLIDAY TRIP AT LEAST ONCE OF FOUR DAYS OR MORE IN 1985

136/ Lets talk about your 1985 holidays. If you went away more than once we will start with your main holiday and then move on to one of your other holidays, whichever one you wish to mention.

| | Main holidays | Others holidays | |
|---|--------------------------|-------------------------------------|--|
| 136. It started in which month? (Give same code number as for Q. 132) | <input type="checkbox"/> | (147) <input type="checkbox"/> | |
| 137/8 How many days away from home in total ? | <input type="checkbox"/> | (148/9) <input type="checkbox"/> | |
| 139. How many people were you on this holiday (including children) ? | <input type="checkbox"/> | (150) <input type="checkbox"/> | |
| 140. Where did you go? (SHOW LIST - MULTIPLE ANSWERS POSSIBLE) | | | |
| On holiday in (your country) | 1 | 1 (151) | |
| In another country in the E.E.C. | 2 | 2 | |
| Somewhere else in Europe (Switzerland, Austria, Scandinavia, Russia, etc) | 3 | 3 | |
| Outside Europe (America, Asia, Africa, etc) | 4 | 4 | |
| 141. Did you stay in one place or did you go to several places ? | | | |
| Same place | 1 | 1 (152) | |
| Several places | 2 | 2 | |
| 142. Was it ... (MULTIPLE ANSWERS POSSIBLE) | | | |
| In the countryside | 1 | 1 (153) | |
| In the mountains | 2 | 2 | |
| In a town or towns | 3 | 3 | |
| By the seaside | 4 | 4 | |
| 143. What method of transport did you use? (MULTIPLE ANSWERS POSSIBLE) | | | |
| Car | 1 | 1 (154) | |
| Train | 2 | 2 | |
| Plane | 3 | 3 | |
| Boat | 4 | 4 | |
| Bicycle/motorbike | 5 | 5 | |
| Other | 6 | 6 | |
| 144. What sort of accomodation did you stay in? (MULTIPLE ANSWERS POSSIBLE) | | | |
| Hotel/boardng house/motel | Y | Y (155) | |
| Rented villa/bungalow/chalet etc. | X | X | |
| Own weekend home or holiday cottage etc. | 0 | 0 | |
| Staying with parents or friends | 1 | 1 | |
| Stayed as paying guest in private house | 2 | 2 | |
| Camping/caravanning | 3 | 3 | |
| Holiday village | 4 | 4 | |
| Youth Hostel | 5 | 5 | |
| Boat/cruise | 6 | 6 | |
| Other | 7 | 7 | |
| 145. How did you book this holiday ? | | | |
| Through a travel agency as a packaged tour or organised trip | 1 | 1 (156) | |
| Through a travel agency only for travel arrangements | 2 | 2 | |
| Through a club or association you belong to | 3 | 3 | |
| By yourself or by the family without using a travel agency | 4 | 4 | |
| 146. If you had to give a rating from 1 to 10 to indicate how pleased you were with this holiday, 1 being not at all pleased and 10 being completely pleased, what number would you say ? | <input type="checkbox"/> | (157) <input type="checkbox"/> | |

(FOR RATING 10, (COMPLETELY PLEASED) CODE X)

Mercrèdi 12 Mars 1986
QUESTIONNAIRE EURO 25

- 4 -

(A TOUS) Voici une liste des onze autres pays de la Communauté européenne. (MONTRER LA LISTE, DANS LAQUELLE VOUS AUREZ SUPPRIMER LE NOM DE VOTRE PAYS ET SON NUMERO DE CODE).

158. Quels sont tous ceux que vous avez déjà visités, quelle que soit la raison de cette visite ? (REponses MULTIPLES)

159. Et quels sont, dans cette liste, les trois pays que vous aimeriez le mieux visiter ou revisiter ? (TROIS REponses SEULEMENT)

| | 158 | 159 |
|---------------------|--------------|----------|
| | Déjà visités | Préférés |
| Belgique..... | Y | Y |
| Danemark..... | X | X |
| Deutschland..... | 0 | 0 |
| Ellas..... | 1 | 1 |
| Espana..... | 2 | 2 |
| France..... | 3 | 3 |
| Irèland..... | 4 | 4 |
| Italia..... | 5 | 5 |
| Luxembourg..... | 6 | 6 |
| Nederland..... | 7 | 7 |
| Portugal..... | 8 | 8 |
| United Kingdom..... | 9 | 9 |

(VEUILLEZ EXPRIMER LE NOM DE CHAQUE PAYS DANS VOTRE LANGUE).

160. Que vous soyez parti ou non en 1985, vous est-il arrivé, au cours de l'année... (REponses MULTIPLES POSSIBLES)

1. De passer dans une agence de voyages pour recueillir de la documentation ou des catalogues de voyages possibles
2. D'écrire pour demander des brochures, dépliants, prospectus
3. De feuilleter un catalogue de voyages qui vous est tombé sous la main
4. Rien de tout cela

161. Dans la liste suivante (MONTRER LA LISTE), quels sont les éléments qui, à vos yeux personnellement, sont les plus attirants pour un lieu ou une région de vacances ? (REponses MULTIPLES).

1. La possibilité de pratiquer un ou plusieurs sports
2. Des hôtels confortables
3. Un dépensement complet
4. Un coût de la vie pas trop élevé
5. Des paysages intacts
6. Des distractions (cinéma, dancing, parc d'attractions)
7. Des curiosités naturelles à visiter (cascades, montagnes, grottes, etc.)
8. Des monuments ou des musées
9. Autre chose

Mercrèdi 12 Mars 1986
QUESTIONNAIRE EURO 25

- 4 -

TO ALL. Here is a list of the eleven countries of the European Community other than your own (SHOW LIST, LEAVE OUT YOUR COUNTRY AND ITS CODE NUMBER).

158. Which of these countries have you already been to, whether for holidays or any other reason (MULTIPLE ANSWERS).

159. From this list could you tell me the three countries that you would like best to go to or go back to (THREE ANSWERS ONLY).

| | 158 | 159 |
|---------------------|-----------------|---------------|
| | Already visited | Like the best |
| Belgium..... | Y | Y |
| Denmark..... | X | X |
| Germany..... | 0 | 0 |
| Greece..... | 1 | 1 |
| Spain..... | 2 | 2 |
| France..... | 3 | 3 |
| Ireland..... | 4 | 4 |
| Italia..... | 5 | 5 |
| Luxembourg..... | 6 | 6 |
| Netherlands..... | 7 | 7 |
| Portugal..... | 8 | 8 |
| United Kingdom..... | 9 | 9 |

160. Whether you went away or not in 1985, did you ever during that year... (MULTIPLE ANSWERS POSSIBLE).

1. Call in at a travel agent to pick up pamphlets and catalogues of possible holidays
2. Write to ask for brochures and prospectuses of holidays
3. Look through a holiday catalogue which you happen to see
4. None of these things.

161. Looking at this list (SHOW LIST), what are the things which in your own opinion are the most attractive points when choosing somewhere to go on holiday ? (MULTIPLE ANSWERS).

1. Opportunity to take part in various sports
2. Comfortable hotels
3. Feeling of being in a really foreign country
4. Cost of living not too high
5. Beautiful countryside
6. Entertainments (cinema, dancing, amusement parks, etc.)
7. Seeing marvels of nature (waterfall, mountains, caves etc.)
8. Monuments, museums, galleries
9. Other things

60. Are you: (Read out)

- 1 Single
- 2 Married
- 3 Living as married
- 4 Divorced
- 5 Separated
- 6 Widowed

61. How old were you when you finished your full-time education?

- 1 Up to 14 years
- 2 15 years
- 3 16 "
- 4 17 "
- 5 18 "
- 6 19 "
- 7 20 "
- 8 21 "
- 9 22 years or older
- X Still studying

62/ If there were a General Election tomorrow (Say if contact under 18: and you had a vote), which party would you support?

SEE LOCAL CODES

64/65 BLANK

66. Sex:

- 1 Man
- 2 Woman

67. Can you tell me your date of birth please? (Write in date of birth AND age.)

Born: _____
Age: _____

69. How many persons live your home, including yourself, all adults and children?

Write in number: _____

70. How many children living at home:

(a) between 8 and 15? _____

(b) under 8 years? _____

72. We would like to analyse the survey results according to the income of persons interviewed.

Show INCOME CARD: Here is a scale of incomes and we would like to know in what group your family is, counting all wages, salaries, pensions and any other income that comes in. Just give me the number of the group your household falls into before tax and other deductions.

1 2 3 4 5 6 7 8 9 X V

I hereby attest that this is a true record of an interview, made strictly in accordance with your requirements, with a person who is a stranger to me. This form was completed entirely at the time of interview.

Signed: _____ Date: _____

This form is the property of:
© Social Surveys (GALLUP POLL) Limited

73. Occupation of self: (Write in AND code)

Self employed:

- 1 Farmers, fishermen (skippers)
- 2 Professional - lawyers, accountants, etc.
- 3 Business - owners of shops, craftsmen, proprietors

Employed:

- 4 Manual worker
- 5 White collar - office worker
- 6 Executive, top management, director

Not employed:

- 7 Retired
- 8 Housewife, not otherwise employed
- 9 Student, military service
- 0 Unemployed

74. If self-employed or employed: Others go to Q. 75 How many people are working where you work? (Organisation, company, shop, factory, etc.)

- 1 Less than 5
- 2 5 - 49
- 3 50 - 499
- 4 500 and over

75. Are you the head of the household?

- 1 Yes - go to Q. 78
- 2 No - ask Q. 76

76. Occupation of head of household: (Write in AND code)

Self employed:

- 1 Farmers, fishermen (skippers)
- 2 Professional - lawyers, accountants, etc.
- 3 Business - owners of shops, craftsmen, proprietors

Employed:

- 4 Manual worker
- 5 White collar - office worker
- 6 Executive, top management, director

Not employed:

- 7 Retired
- 8 Housewife, not otherwise employed
- 9 Student, military service
- 0 Unemployed

77. Size of locality

Local codes

78. Would you say you live in a: (Read out)

- 1 Rural area or village
- 2 Small or middle size town
- 3 Big town

79/ Regions
80. Local codes

Name and address of contact - please PRINT

Mr/ _____
Mrs/ _____
Miss: _____
Address: _____