



WHAT DO YOU CONSIDER IMPORTANT WHEN CHOOSING A DESTINATION FOR YOUR SUMMER HOLIDAY?

I-Test Executive
Summary



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General Manager

Enric Renau

Manager

Sílvia Amblàs

Project Manager

Pere Casamayor

Technical Analyst

Rachel Nelson

Carrer del Clot, 104 planta baixa

08018 Barcelona

Tel. 93 215 13 65

Fax 93 467 76 38

Correu-e: dep@dep.net

www.dep.net

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- This survey includes FIA automobile and touring club web users from around the globe. It includes more than 9,000 responses from 38 countries and 45 touring and automobile clubs from every continent. This allows for the aggregate analysis of data on an international level and to understand better extent the resulting similarities and differences regarding tourism. The use of an online survey permits the study to concentrate on those who are users of FIA automobile and touring club services, specifically those who visit the websites or receive an electronic newsletter. Respondents self select themselves to participate in the survey and voluntarily complete the questionnaire.

These conditions limit possibility to control of characteristics of the universe within the sample. The varying number of completed surveys for different regions and countries results in differences in sample error and representativeness of those clubs webs users. Europe has a very large presence within the overall sample (76%) and therefore is represented to a great extent in those results. The universe of this particular survey is that of those who are close to or members of FIA automobile and touring clubs. In this sense, the samples obtained from Europe, regions within Europe, and outside of Europe are sufficiently representative of the target population because FIA automobile and touring clubs have members around the world and are an attractive target population within the tourism sector. The global component of this study allows for an analysis of the opinions regarding holiday destinations and tourism of a population which can be found within all regions of the world and is a specific touristic target of interest.

- Travellers consider many factors when choosing a holiday destination. Travellers consider for example, the climate/weather, the price of transportation or the quality of accommodation which is offered by a particular destination. The purpose of this study is to discover the importance of these factors for the traveller when they decide on a destination for their holiday. It also examines other aspects regarding holiday travel and the evaluation of destinations by recent tourists. With this information, FIA touring and automobile clubs can better assist in the process of choosing a holiday destination. Institute DEP has applied a quantitative methodology to this study. The survey was conducted online in the form of a structured questionnaire which was available on participating FIA touring and automobile club websites. FIA touring and automobile clubs from 38 countries participated in the study.

The surveys were completed between January 12, 2009 to April 1, 2009 on the websites of participating FIA touring and automobile clubs. The sample includes 9,041 questionnaires answered by FIA touring and automobile club web

users. The sample has a margin of error of $\pm 1.05\%$ for a confidence level of 95.5% (2 sigmas), and in the case of maximum indetermination ($p=q=50\%$).

76.5% of the sample originates from Europe while 11.1% of respondents are from Central and East Asia and the remaining respondents are from Africa, West Asia, Oceania, Argentina and respondents who answered from the FIA's main website. 61.3% of the sample is male and the mean age is 45.6 years.

- ❑ **The most important factor for respondents when they choose a holiday destination is a general sense of safety.** This factor is given a higher mean importance score by women than men, but there are no significant differences by the age of respondents. A general sense of safety is also one of the factors that are best evaluated by the overall sample; however, its overall mean evaluation is 0.5 points below its mean importance. In general, factors which correspond to environmental, social or political aspects of a destination country receive a higher mean importance than other categories of factors. Climate/weather, quality of accommodation, presence of areas of natural beauty and accessibility by a favourite means of travel are also given high importance scores.

Public transport in the country of destination, the availability of sports facilities and nightlife are consistently less important factors for respondents when they choose a holiday destination.

Nightlife is more important and receives a better evaluation from younger respondents, especially those between 18 and 30 years of age. Respondents 18-45 give a higher importance to the quality of swimming water and beaches and the availability of sports facilities when they choose a holiday destination. These respondents also give a higher mean evaluation to the opportunity for adventure and discovery. Older respondents (over 46 years of age) give more importance to the accessibility of a destination by a favourite means of travel and the medical facilities in the country of destination. Older respondents also give a higher mean evaluation to medical facilities.

- ❑ **The largest percentage of respondents took their last holiday to Southern European destinations.** Italy and Spain are the top two holiday destinations of the overall sample. Other top destinations include: France, Japan, Greece, the United States, Croatia, Austria, Australia and Germany. While Southern Europe is the most frequent holiday destination region among European respondents, respondents from Central and East Asia, Oceania, Africa, and West Asia significantly travel to destinations within their respective regions. This is especially evident in the case of Japan. 70.2% of Japanese respondents took their last holiday within Central and East Asia and more than half of

Japanese respondents took their last holiday to a destination within Japan. **Younger respondents (18-30) travelled in greater percentage to destinations outside of Europe when compared with older respondents.**

Australia is the best evaluated destination. Oceania also ranks first of the holiday destination regions. In contrast, Romania is the country which receives the lowest evaluation as a destination. Eastern Europe and Africa rank sixth and seventh respectively (out of 7 positions) in the evaluation of holiday destination regions.

- ❑ **Overall, the two most common means of travel to a holiday destination are travel by car and travel by plane.** There are significant differences, however, by origin of respondents and by the destination. Eastern Europeans travel by car and by coach to a greater degree than respondents from other regions. Travel by train is more common for respondents from Central and East Asia, while travel by plane is more significant for respondents from Northern Europe and West Asia.

For respondents who took their last holiday to destinations in Africa, Latin America, North America, West Asia and Oceania a higher percentage use a plane as a method of transport than those who travelled to other regions. Respondents who recently travelled to Northern or Western Europe travelled by car to a larger degree than those who travelled to other regions.

- ❑ **Respondents travel most with a partner.** 48.4% of respondents travelled on their last holiday with a partner and 73.7% travelled most recently with a partner or with a partner and children. There are some small differences in the composition of the holiday travel party of respondents by their origin. Southern Europeans, for example, travel to a greater extent than respondents from other regions with a group (with or without children).

The method of transportation used was mostly homogeneous for the different possible compositions of holiday travel parties. However, overall, travel by car was more significant for those who travelled with a partner and children than those who travelled with other types of travel parties. Also, respondents who travelled with a group travelled to a greater degree by coach. Women travelled to a greater degree than men with children or with a group (either with or without children). Men, on the other hand, travelled with a partner in greater proportion than women. Respondents 18-30 travelled more in groups. Those 31-45 travelled to a greater degree with a partner and children and a majority of respondents over 46 years of age travelled with a partner.

- ❑ **When respondents evaluate their last destination the presence of areas of natural beauty is the factor which receives the overall highest mean evaluation.** Women give a slightly higher mean evaluation of this factor than men. The mean evaluations of the 19 country aspects are similar. Climate/weather, accessibility by a favourite means of travel, and general sense of safety also receive high mean evaluations. Overall, factors which deal with environment, social or political aspects of the country of destination receive a higher mean evaluation than other factors. Also, respondents from Oceania and Eastern Europe tend to give higher mean evaluations to the aspects of the country of destination than respondents from other regions. Oceania is the destination which was consistently the destination region which was given the highest evaluation (mean of means of the 19 factors) by tourists who recently visited.

- ❑ **The gaps between mean importance and mean evaluation scores are often significant.** When comparing the mean importance of the factors to their mean evaluation, all 19 factors have significant gaps between these two distinct scores in the overall sample. The factor, public transport in the country of destination has the largest gap between these two scores. The mean evaluation it receives is much higher than its importance. The most important factor to tourists when choosing a destination, general sense of safety, receives an importance score which 0.5 points higher than its evaluation score. However, when the importance and evaluation of the destination factors are analyzed by the destination country of the respondent many times the most important factor for those tourists when they choose a destination is also the best factor which receives the highest mean evaluation.

Tourists from Oceania are the most satisfied tourists while tourists from Southern Europe are the least satisfied. Tourists from Eastern Europe however are in between, with no gap between their mean evaluation and the mean importance they gave. All the regions gave a mean evaluation higher than the mean importance to the group of factors which concern aspects of leisure, tourism and dining. At the country level, British tourists are the most satisfied, followed closely by the Australians, and the Portuguese respondents are the least satisfied.

□ Summary of Regional Results :

Northern Europe	
Most Important Factor	Climate/weather
Least Important Factor	Availability of sports facilities
Top Destination Region	Southern Europe
Method of Transportation	Plane
Travel Party	A partner
Highest Evaluated Factor	Climate/weather
Lowest Evaluated Factor	Availability of sports facilities
Sex	58.1% male
Mean Age	47.2 years

Africa	
Most Important Factor	General sense of safety
Least Important Factor	Availability of sports facilities
Top Destination Region	Africa
Method of Transportation	Plane
Travel Party	A partner
Highest Evaluated Factor	Presence of areas of natural beauty
Lowest Evaluated Factor	Availability of sports facilities
Sex	52.1% male
Mean Age	50.9 years

Oceania	
Most Important Factor	General sense of safety
Least Important Factor	Availability of sports facilities
Top Destination Region	Oceania
Method of Transportation	Plane
Travel Party	A partner
Highest Evaluated Factor	Presence of areas of natural beauty
Lowest Evaluated Factor	Availability of sports facilities
Sex	68.1% female

Southern Europe	
Most Important Factor	General sense of safety
Least Important Factor	Availability of sports facilities
Top Destination Region	Southern Europe
Method of Transportation	Plane
Travel Party	A partner
Highest Evaluated Factor	Presence of areas of natural beauty
Lowest Evaluated Factor	Availability of sports facilities
Sex	57.1% male
Mean Age	40.3 years

Eastern Europe	
Most Important Factor	General sense of safety
Least Important Factor	Public transport in the country of destination
Top Destination Region	Southern Europe
Method of Transportation	Car
Travel Party	A partner
Highest Evaluated Factor	Presence of areas of natural beauty
Lowest Evaluated Factor	Public transport in the country of destination
Sex	66.4% male
Mean Age	40.0 years

West Asia	
Most Important Factor	General sense of safety
Least Important Factor	Availability of sports facilities
Top Destination Region	West Asia
Method of Transportation	Plane
Travel Party	A partner
Highest Evaluated Factor	General sense of safety
Lowest Evaluated Factor	Availability of sports facilities
Sex	70.1% male
Mean Age	36.2 years

Western Europe	
Most Important Factor	General sense of safety / Climate/weather
Least Important Factor	Public transport in the country of destination
Top Destination Region	Southern Europe
Method of Transportation	Car
Travel Party	A partner
Highest Evaluated Factor	Can be reached by your favourite means of travel
Lowest Evaluated Factor	Nightlife
Sex	63.8% male
Mean Age	49.3 years

Central and East Asia	
Most Important Factor	General sense of safety
Least Important Factor	Availability of sports facilities
Top Destination Region	Central and East Asia
Method of Transportation	Plane
Travel Party	A partner
Highest Evaluated Factor	Presence of areas of natural beauty
Lowest Evaluated Factor	Availability of sports facilities
Sex	74.3% male
Mean Age	45.1 years