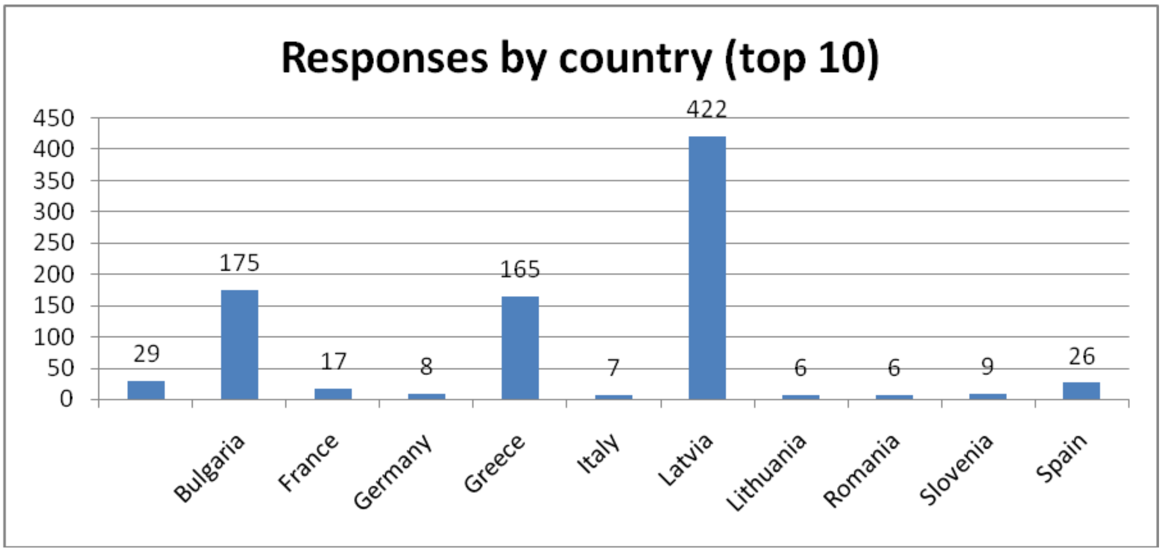
RURAL TOURISM QUALITY SURVEY (customer review – preliminary overview)

2009

Rural tourism quality survey was launched online on 07.05.2009. 923 responses were received by August 31, 2009. The aim of the review is to find out customer quality expectations in rural tourism and the relative importance of quality aspects influencing the consumer choice of a holiday site. The survey form is accessible from the project partner web sites : www.countryholidays.lv (Latvian Country Tourism Association Lauku celotajs), www.baatbg.org (Bulgarian Association for alternative tourism BAAT), www.guestinn.com (Greek Network of Rural Accommodation, www.eurogites.org (European Federation of Farm and Village Tourism EUROGITES), www.raar.es (Andalusian Network of Rural Accommodation), www.kgzs.si (Chamber of Agriculture and Forestry of Slovenia, Agriculture and Forestry Institute Celje).
The survey will be closed in spring 2010 when analysis of full data will be made.

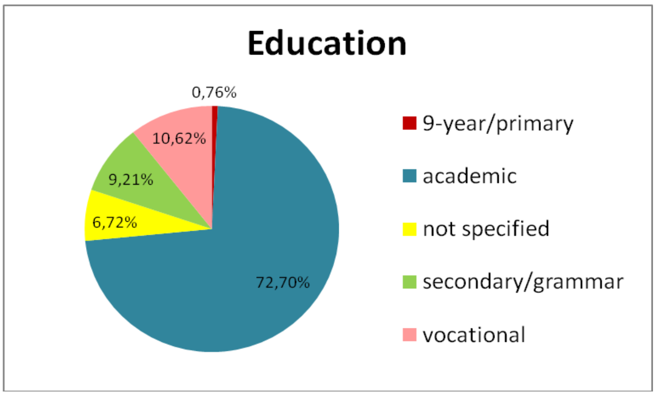
1. Respondent countries

923 responses were received from 41 countries. Several countries represented with just a few responses. Most responses were received from Latvia (422 responses - 45,72% of the total), Bulgaria (175 responses – 18,96%), Greece (165 responses – 17,88%). 29 respondents did not specified the country.



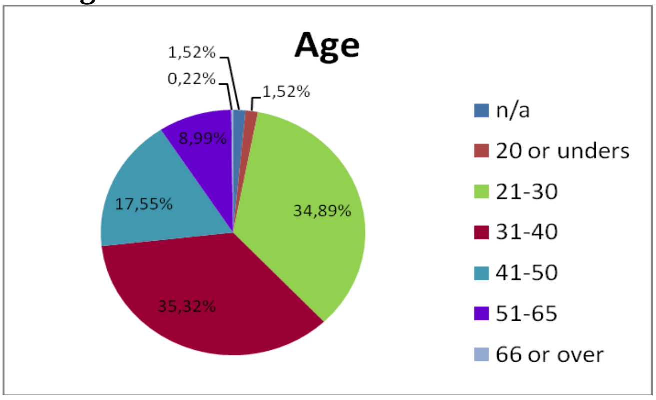
2. Respondent profile

2.1. Education



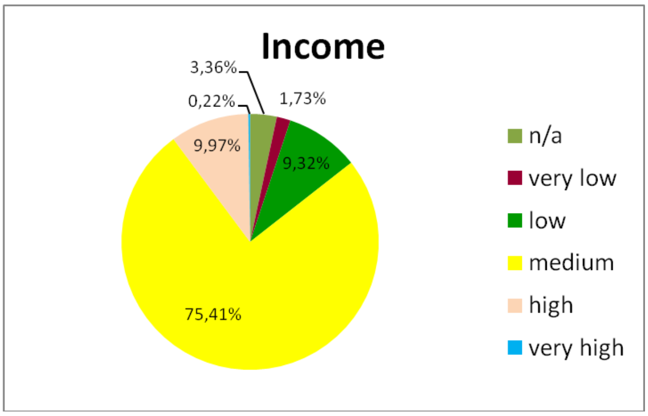
Respondents were asked to specify their age, education and income level. Of the total number, the majority of the respondents reported academic education (72,70%), the least numbers are in 9-yesr/primary education (0,76%). Vocational and secondary education, respectively, 10,62% and 9,21%. 6,72% did not specify their education level.

2.2. Age



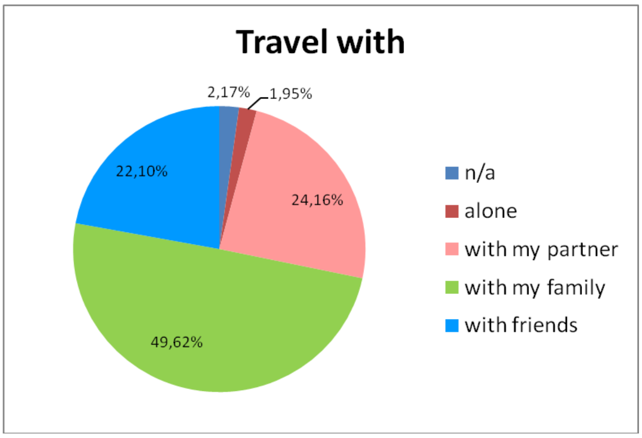
Two biggest age groups are 31-40 years (35,32%) and 21-30 years (34,89%). Persons over 50 years are less active respondents.

2.3. Income level



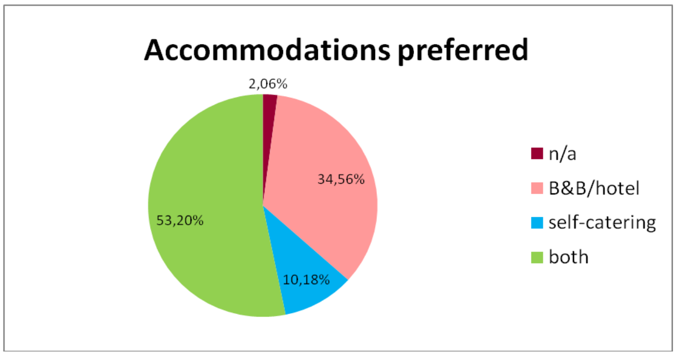
75,41% of the respondents estimate their income level as medium. 0,22% of the respondents have not replied to this question. Only 1,73% admit their income level as very low. High and low income levels are represented in similar proportion, respectively, 9,97% and 9,32%.

2.4. Travelling with…



Most of the respondents are travelling with their families (49,62%). Significant proportion are travelling with a partner (24,16%) or friends (22,10%). Only 1,95% are travelling alone.

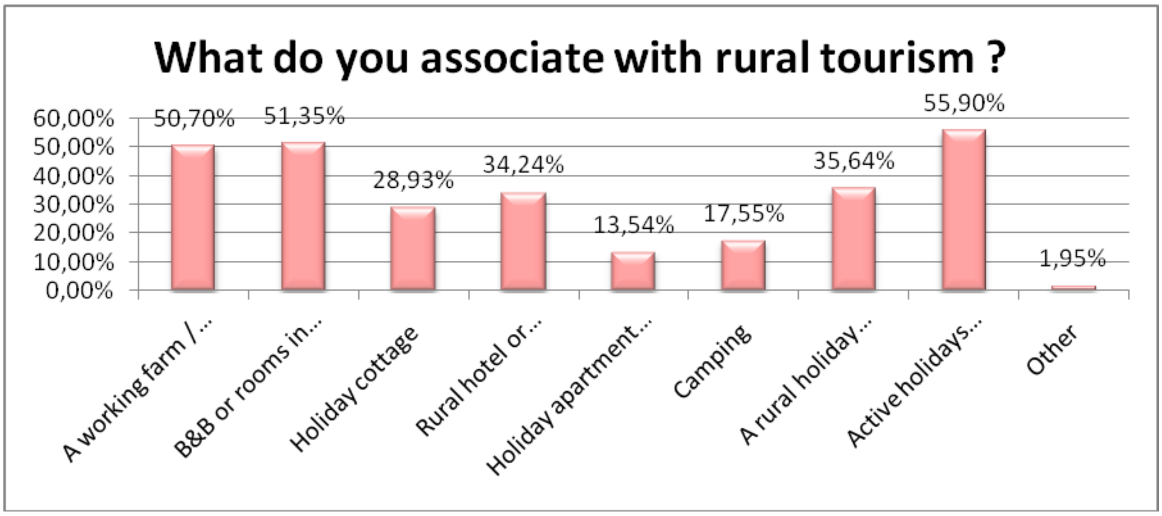
2.5. Accommodations preferred



Nearly half of the respondents (53,20%) do not make difference choosing between B&B or self-catering accommodation. If preference given, respondents of this survey are more interested in serviced accommodation (34,56%).

Consequently, in average, the majority of the respondents – potential rural tourism customers, are 31-40 years old, travelling with a family, academically educated, representing medium income level and have no specific preferences as to accommodation type between B&B or self-catering.

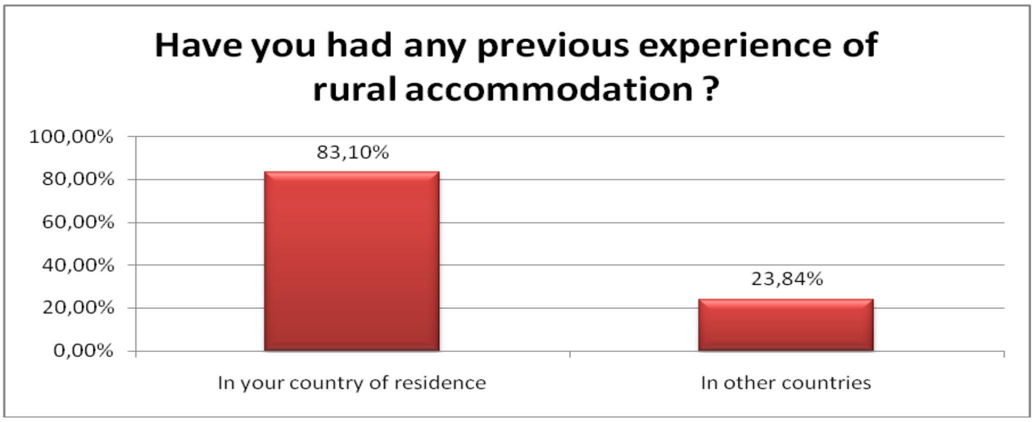
3. Perception on Rural Tourism



Several options were allowed in reply to this question. Most of respondents associate rural tourism with active holidays: riding, cycling, hiking etc., (55,90%) and B&B or rooms in rural setting (51,35%) or stay on a working farm (50,70%).

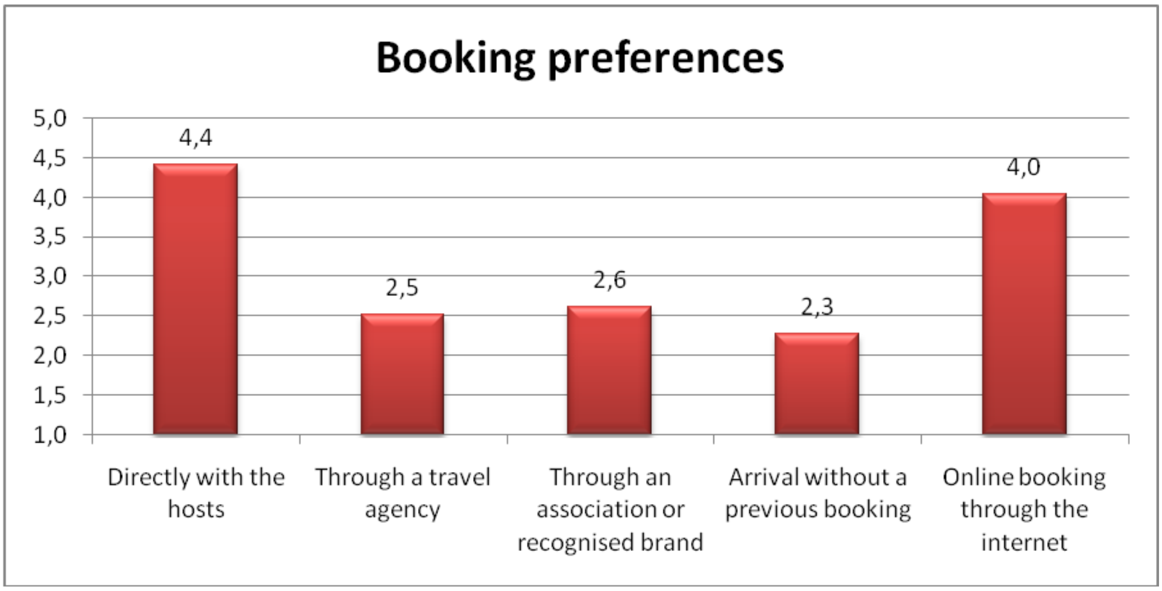
Rural hotel or guesthouse (34,24%), holiday cottage (28,93%), rural holiday complex (35,64%) all come next, and the least associated with rural tourism are holiday apartment in a rural household (13,54%) and camping 17,55%. There are respondents (1,95%) who associate rural tourism also with something else: „visiting nature attractions and trails, tranquil rural setting, peaceful holidays, lots of nature – untouched by „modernisations", fishing, meetings in rural destinations, hiking, sauna, country foods).

4. Previous experience with rural tourism services



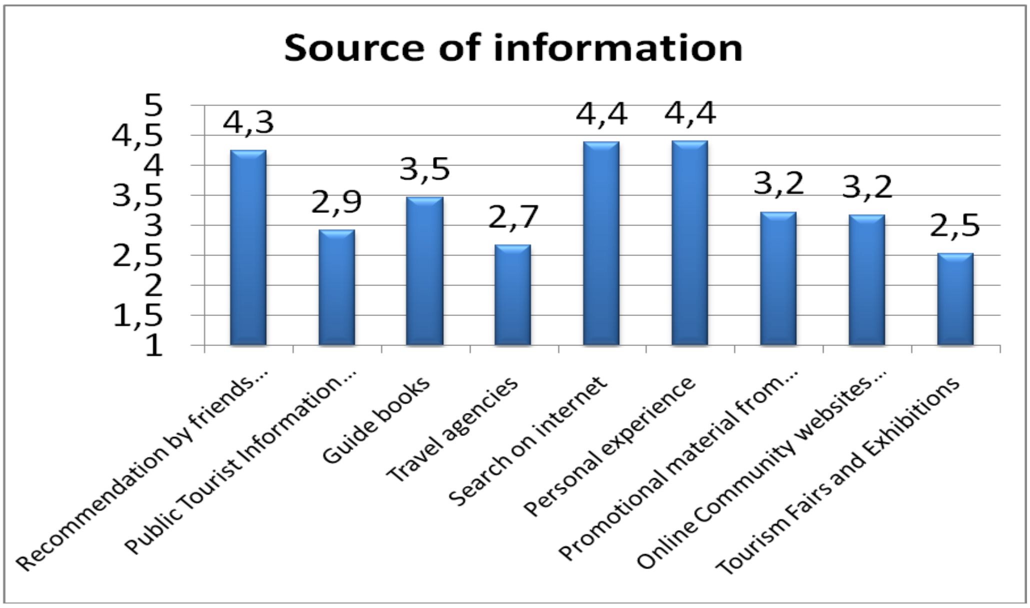
83% of the respondents have used rural tourism services in home country. Only 23,84% have experienced rural holidays in other countries. This confirms that domestic markets are the most important for rural tourism providers while international markets seems to be an underused opportunity.

5. Booking preferences



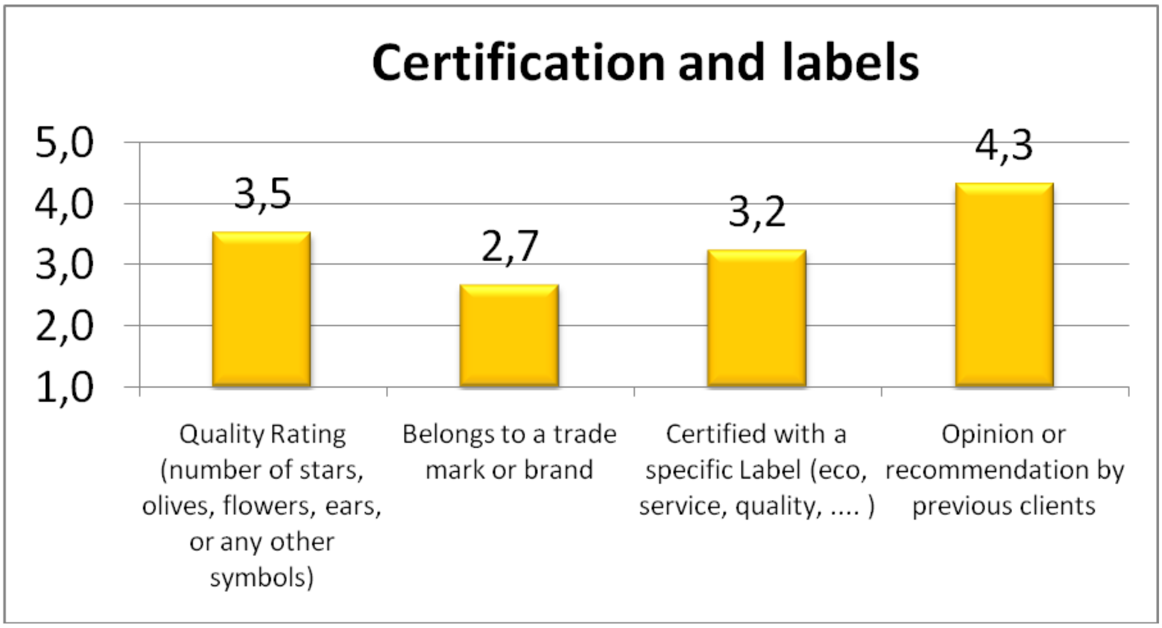
Respondents were asked to give scores to booking options from 1 – less preferred to 5 – the most preferred. Direct bookings and online bookings (either directly or through reservation systems) score highest while arrival without a previous booking is less favoured.

6. Sources of information – preferences



Respondents were asked to give scores to sources of information they are using from 1 – less preferred to 5 – the most preferred. Search on Internet (4,4, Personal experience 4,4), Recommendations by friends and colleagues (4,3) rank first, while travel agencies (2,7) and travel fairs (2,5) are the least used source of information.

7. Certifications and labels

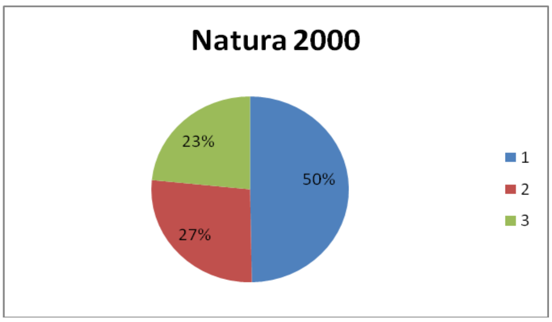


Opinion or recommendation by previous clients (score 4,3 out of 5) is a is a stronger argument than quality scheme rating (3,5) or specific labels (3,2). Branding in rural tourism is not very popular, scoring in average only 2,7.

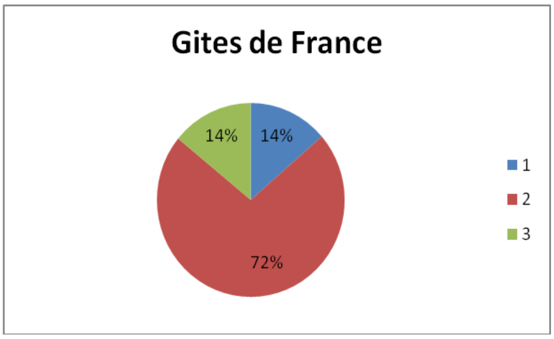
8. Recognition of logos

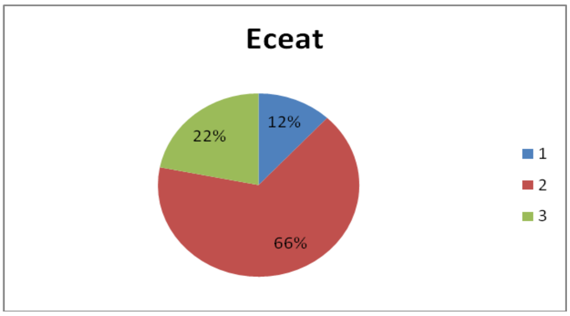
The best recognized are the logos of the Worldwide Fund for Nature (81%), Natura2000 (50%) and the European flower ecolabel (26%). Rural tourism organizations are comparatively less recognized.

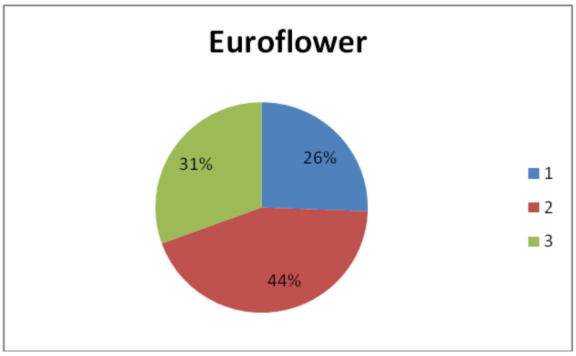
Logo	**Yes – recognize**	**No – do not recognize**	**Have seen somewhere**
WWF	81%	4%	15%
Natura 2000	50%	27%	23%
European flower	26%	44%	31%
Eurogites	18%	62%	20%
Gites de France	14%	72%	14%
Eceat	12%	66%	22%
Urlaub auf dem Lande	11%	75%	14%
Farm Stay UK	10%	79%	11%

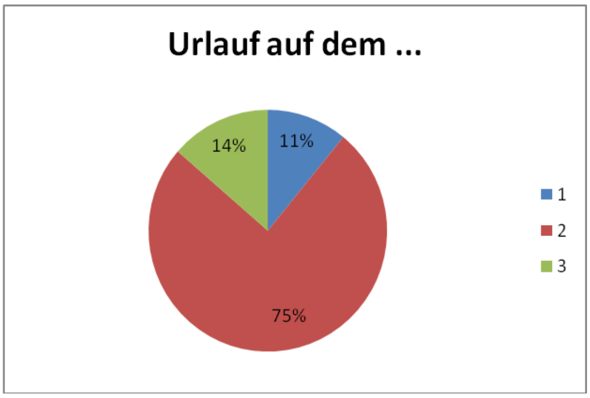


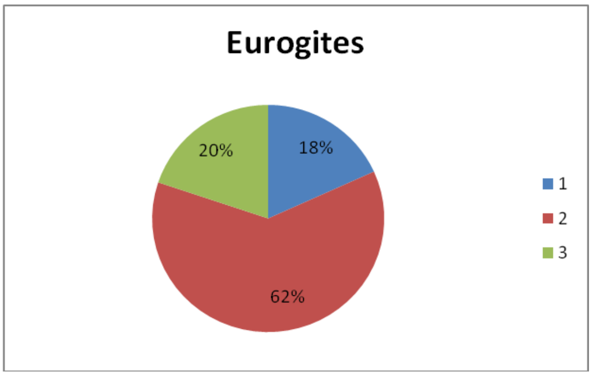
NATURA 2000

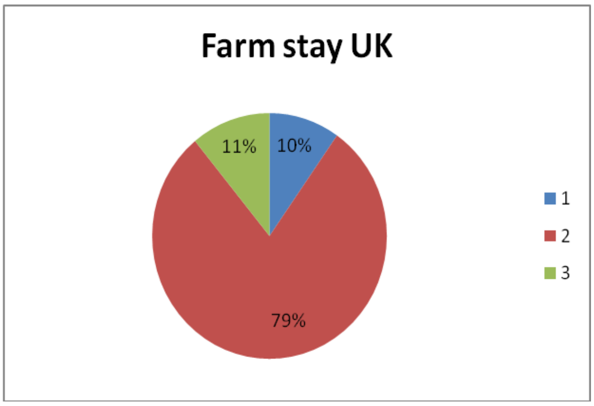

Gites de France
14%
14%
72%
1
2
3

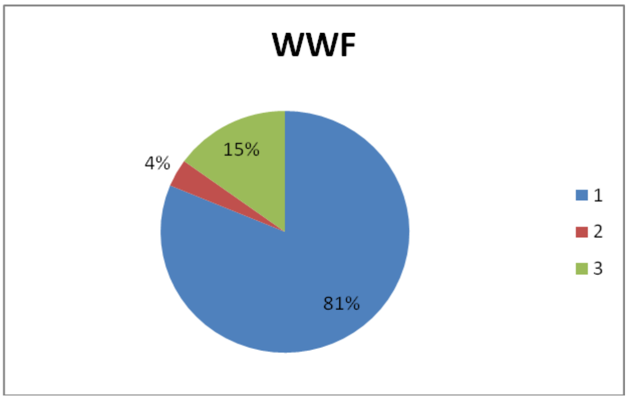

Eceat
22%
12%
66%
1
2
3


Euroflower
31%
26%
44%
1
2
3


Urlauf auf dem ...
14%
11%
75%
1
2
3

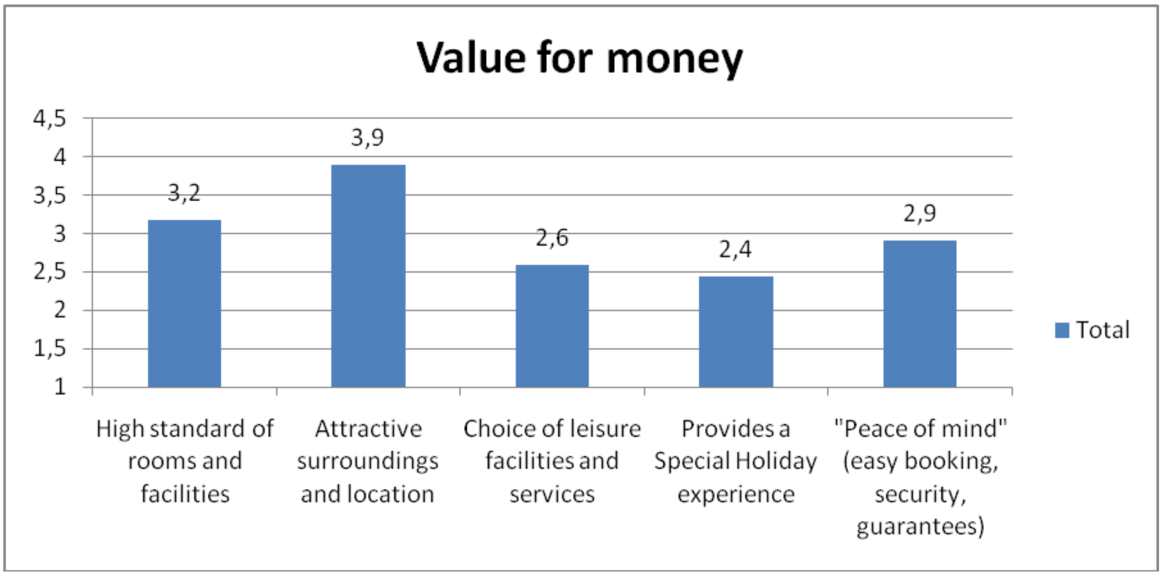

Eurogites
20%
18%
62%
1
2
3





9. Value for money perception

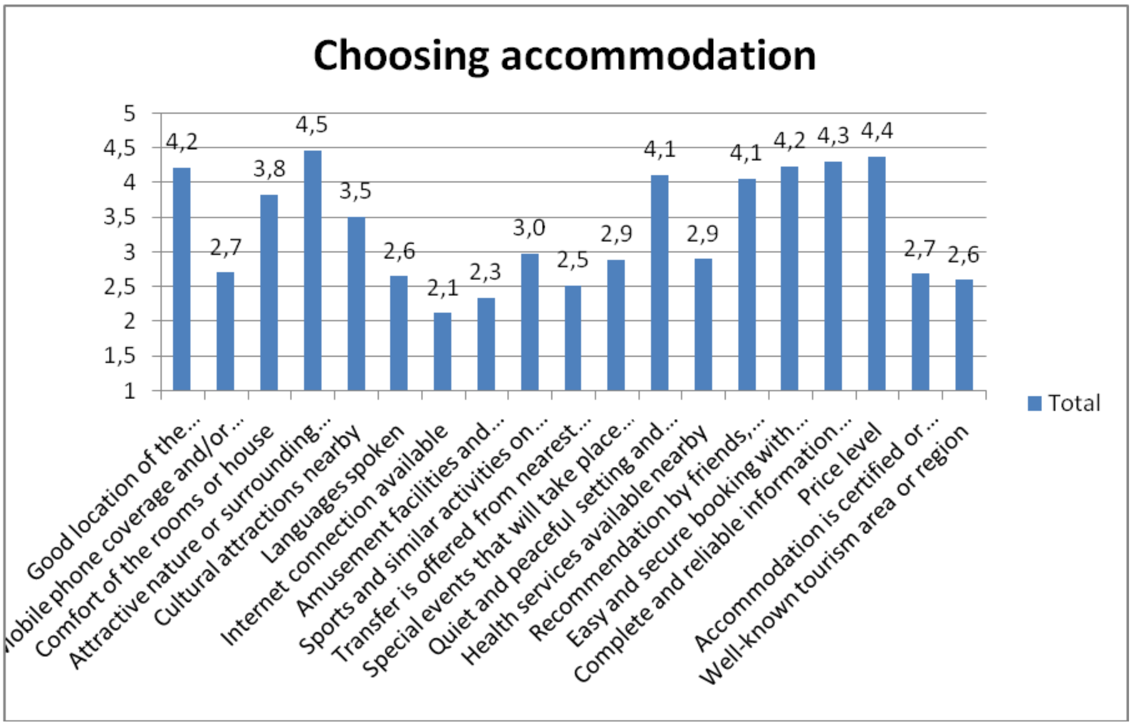
Respondents were asked to allocate points from 1 (does not matter) to 5 (very important), giving the same score only once. Attractive surroundings and location score the highest (3,9 points), while high standard of rooms and facilities are in the 2nd place (3,2 points).



10. Choosing accommodation

Respondents were asked to allocate points from 1 (does not matter) to 5 (very important) to a number of factors influencing their choice of accommodation. The same score was possible to several items. The key factors are attractive nature and surroundings (4,5), price level (4,4), complete and reliable information (4,3). The least important are availability of Internet connection (2,1), amusement facilities and recreational offers (2,3), transfer from the nearest public transportation station (2,5).

Respondents were offered an option to add factors influencing their choice. The named the following: playgrounds – facilities for children, information availability in German or English, distance from the activity facilities, car parking, safety, unknown destination to avoid crowds, cleanliness, hosts friendly but not intrusive, good value for money, privacy – no other guests around, wheelchair access, rich biodiversity, possibility for involvement/contribution to nature conservation, certified reliable service providers, tranquil setting, country food.

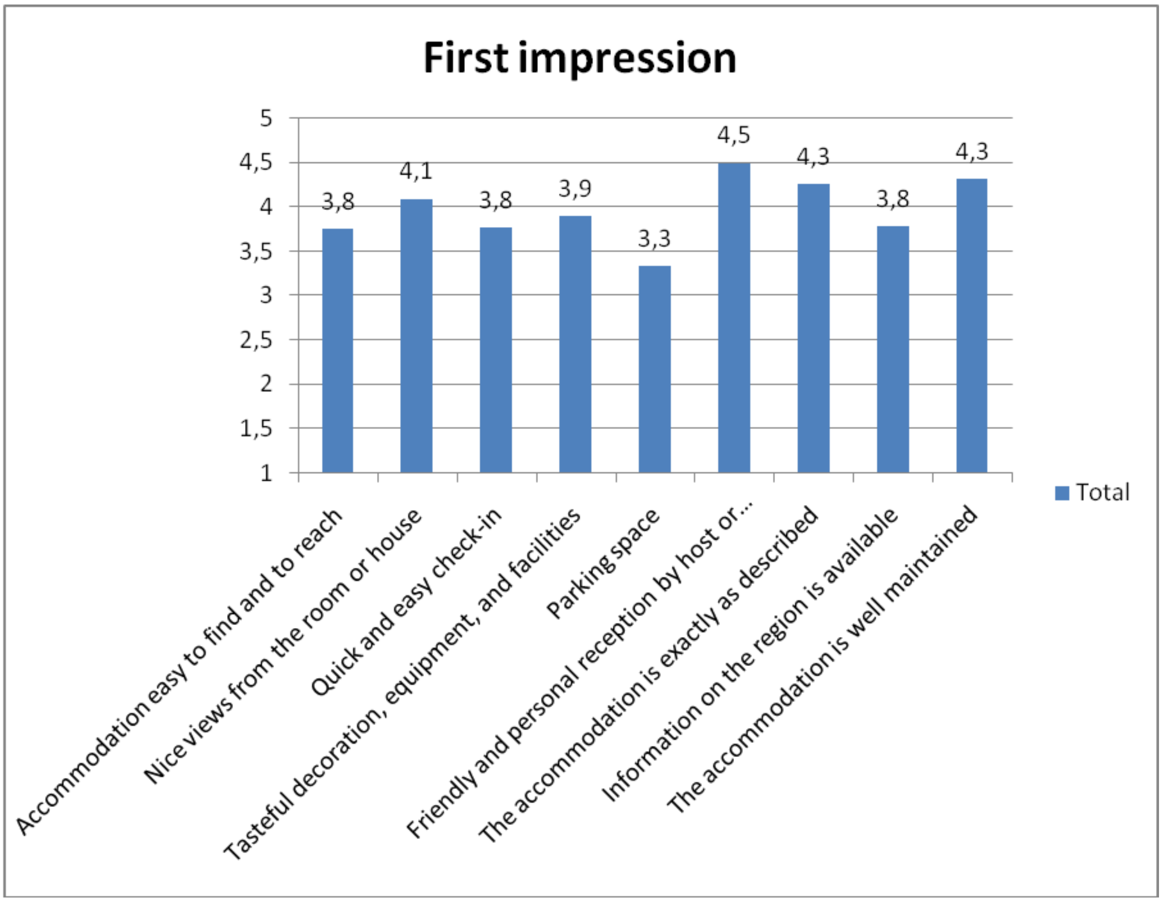


Factors in the survey list:

1. Good location of the accommodation
2. Mobile phone coverage and/or Internet available
3. Comfort of the rooms or house
4. Attractive nature or surrounding landscape
5. Cultural attractions nearby
6. Languages spoken
7. Internet connection available
8. Amusement facilities and recreational offers
9. Sports and similar activities on premises or nearby
10. Transfer is offered from nearest means of public transport
11. Special events that will take place during my stay
12. Quiet and peaceful setting and surrounding
13. Health services available nearby
14. Recommendation by friends, colleagues, or other travellers
15. Easy and secure booking with clear conditions
16. Complete and reliable information on the accommodation
17. Price level
18. Accommodation is certified or belongs to a brand
19. Well-known tourism area or region

11. First impression upon arrival

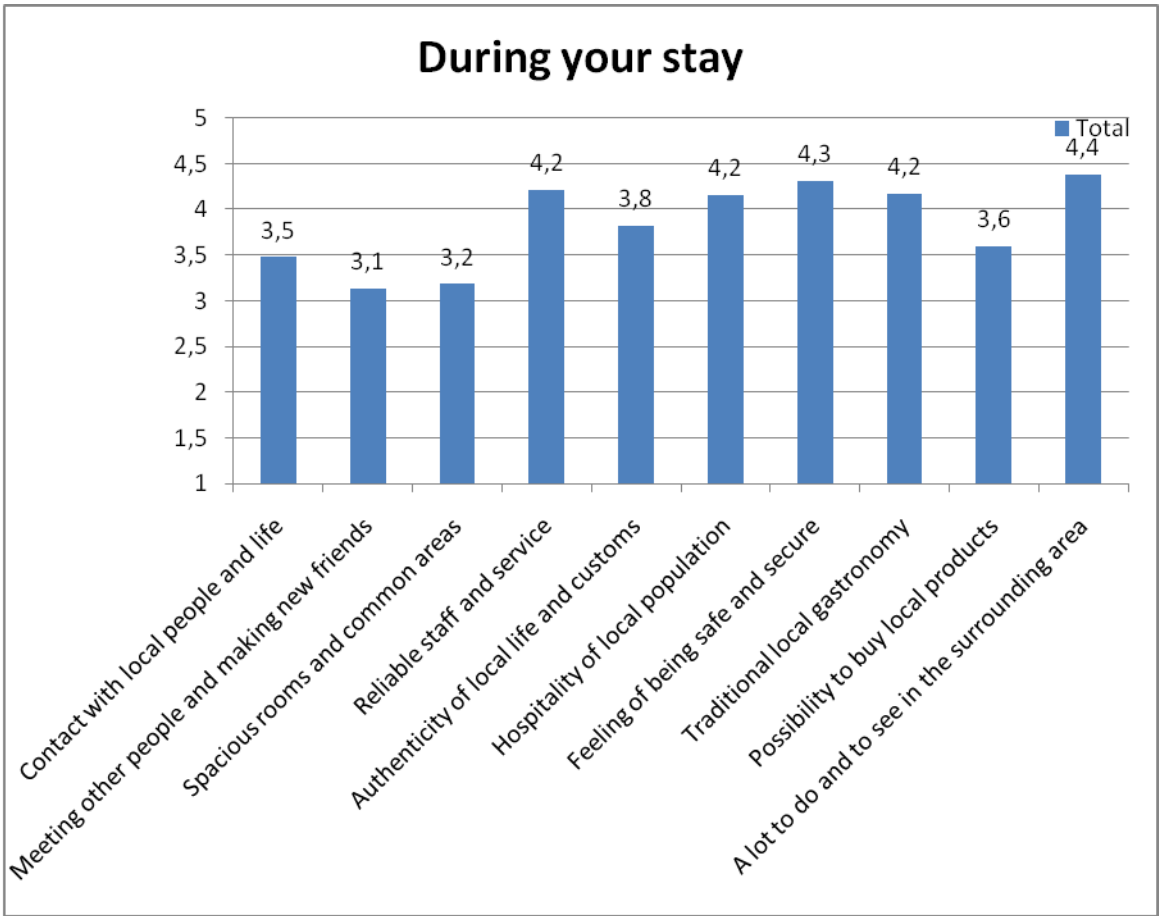
Allocation of points from 1 (does not matter) to 5 (very important) shows importance of first impressions, preferably spreading the scores over the full range. Friendly and personal reception is the most important for the first impression (4,5). The accommodation being precisely as described and good maintenance level of the facilities score equally (4,3). Parking space was the least important for the first impression.



12. Factors that are important during the stay.

A lot to do and to see in the surrounding area is the most important during the stay (scoring 4,4), safety and security score high as well (4,3), reliable staff and service, hospitality of local population and traditional local gastronomy score equally (42). Meeting other people and making new friends scores the lowest (3,1).

Authentic rural life, walking trails or routes, no people around, local information were mentioned among important factors.



13. Factors that are important after return home.
Respondents allocated points from 1 (does not matter) to 5 (very important) ranking the factors that are important after holidays. Happy memories (4,8), wishing to return (4,3) and having a story to tell to friends (4,1) are the most important. Availability of guest book (2,4) or a satisfaction questionnaire (2,6) play less important role.