

EUROPEAN CROSS-BORDER TRAVEL AND TOURISM

LEARNING FROM CONSUMER EXPERIENCES AND COMPLAINTS

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- Czech Republic - Czech Association of Consumers TEST
- Denmark - Taenk/Forbrugerradet (Danish Consumer Council)
- Germany - Stiftung Warentest
- Greece - NEW INKA Consumers Association and EKPIZO
- Slovenia - Zveza Potrošnikov Slovenije (ZPS)
- United Kingdom - Which?

2. EXECUTIVE SUMMARY

Travelling within Europe has become easier since the creation of the European Union in 1993. European Directives covering passenger rights and package travel were created with the intention of protecting consumers travelling within the EU. The aim of European policy is to boost tourism, harmonize services and make travel easier. But is this working in practice?

ANEC (the European consumer voice in standardisation) wanted to explore consumers' experiences of using tourism services to find out what difficulties travellers face, but discovered a lack of unified data about the consumer experience of, and satisfaction with, European tourism services. Existing data tends to focus on trends (e.g. who is travelling where?) rather than on the problems that travellers experience. Wanting to find out more, ANEC commissioned its own research, which included a survey of European consumers, to collect practical examples of the way that people travel within Europe, the services that they use, the nature of problems that they experience and their likelihood to complain.

ANEC's survey reveals that travelling within Europe is not always easy. More than a quarter of people (26.8%) reported having problems when using tourism services within Europe. Car rental was seen as the most problematic service area with 22.4% of people reporting a negative experience. Despite regulation in the areas of plane travel, train travel and package holidays, these three areas had some of the highest levels of problems and complaints. Delays, cancellations, lost luggage, confusion around ticketing and lack of clear information all featured highly on the list of problems, begging the question of how well EU regulation is working – or how aware consumers are of its existence.

The consumers we surveyed were quite assertive about speaking up: 61.1% of people who experienced a problem made a complaint to the service provider. However, 73.8% rated the outcome of their complaint as less than satisfactory. And ANEC's findings show that a very small proportion of unsatisfied customers progress complaints any further, possibly because they do not know where to submit complaints or do not have confidence that their issues will be resolved.

In this report, we detail the experiences of our survey respondents, both when using tourism services and making complaints, with the aim of helping consumer and public interest organisations (such as ANEC) and government to address specific issues, which are most relevant to consumers. We conclude that European consumers need better protection in the areas of price comparison sites, consumer review sites and car rental. There is also a pressing need for consumers to be given clearer information about their rights and where to go for advice and effective resolution of complaints.

3. INTRODUCTION

3.1 Overall project aims

This research and testing project was commissioned by ANEC in April 2013. Its main purpose was:

“To collect data on practical examples of consumer complaints in the consumer services area with a special attention to cross border data with a view to provide ANEC representatives in the Technical Committees (TCs) related to services standardisation with useful evidence in meetings and when defending ANEC views in the services area.”

3.2 Importance of this research

ANEC works to represent the voice of European consumers in the creation of technical standards, especially those developed to support the implementation of European laws and public policies. It is very important that the consumer view is represented accurately and that future work is targeted in those areas where it is needed most. As a non-profit organisation ANEC must prioritise work in areas that it feels are the most important to consumers, either:

- Affecting the largest numbers of people.
- Posing a particularly high risk of consumer detriment (i.e. accident, injury, financial loss, stress and inconvenience).

To ensure that ANEC’s work remains relevant and effective it undertakes research projects to understand the consumer viewpoint. Projects such as this one ensure that ANEC’s work continues to tackle real problems experienced by real consumers.

The results of this project will help to inform the development of new standards at a European level. They will also provide insight that will be useful when commenting on consumer policy, and liaising with other consumer and public interest organisations in Europe.

3.3 Background information

3.3.1 Focus on travel and tourism

It was not possible to conduct a survey that covered all cross border service areas e.g. health, finance and tourism, due to budget constraints and the sheer size of the questionnaire required. Therefore, a decision was made to focus research on the areas of travel and tourism, for the following reasons:

- This is a key area of interest for the Services Working Group at ANEC.

- Travel and tourism services are used by a large proportion of European consumers and this sector is likely to grow.
- The potential for consumer detriment in these areas is high.
- The European Consumer Centres Network (ECC-Net) receives a high proportion of complaints about services within the travel and tourism sectors (see Fig 1 below). Air transport, car rental and package holidays were the three sectors with the highest number of complaints in 2012.

Fig 1: ECC-Net complaints 2012

Main economic sectors concerned by complaints	%
Transport, of which:	32.1%
air transport (including problems with luggage)	21.6%
car rental	3.4%
Timeshare related products and package holidays	7.4%
Recreational, sporting and cultural services	7.0%
Furnishing, household equipment and routine household maintenance	6.8%
Audio-visual, photographic and information processing equipment	5.6%
Health	5.1%
Communication	4.7%
Clothing and footwear	4.5%
Hotels and restaurants	4.5%
Personal care goods and services	3.0%
Financial services and insurance	2.5%

3.3.2 Tourism in Europe

In the words of the European Commission, "Europe is the world's no. 1 tourist destination, with the highest density and diversity of tourist attractions". It says that "the tourist industry has become a key sector of the European economy, generating over 10% of EU GDP (directly or indirectly) and employing 9.7m citizens in 1.8m businesses".¹

Since the creation of the single market in 1993 it has been easier for European citizens to move around within Europe. The single currency; reduced border controls; reduced rates for roaming; medical assistance abroad; and the single EU emergency number (112) have helped to break down barriers to intra-European travel. EU legislation has been developed with the aim of protecting European travellers.

¹ European Commission - ec.europa.eu/enterprise/sectors/tourism/background/index_en.htm

3.3.2.1 Passenger rights

Passenger rights legislation² offers protection to people travelling within the EU. Different regulation gives rights for people travelling by air, rail, bus/coach and ship. There are also rights for passengers with reduced mobility.

The regulations set rules for how companies should deal with delays, cancellations, lost or damaged luggage and online pricing – some of the issues most commonly experienced by our survey respondents. They also state what levels of service passengers should expect, giving them information about their rights in terms of refunds, alternative transport, and financial compensation.

3.3.2.2 Package holidays

All package holidays in the European Union are governed by the 1990 EU Package Travel Directive. This defines what can and cannot be considered a package holiday under EU law, as well as ensuring consumers know that they are getting exactly what they paid for.

However, the Directive is currently under review. The European Commission says that the Directive needs to be updated to take into account the increasing number of holidays that are now booked on the internet. Following an extensive consultation process the EU announced its proposals for reform in July 2013 saying that the changes would bring the Directive 'into the digital age'.³ It proposes several key changes. The proposed Directive:

- is wider in scope and clearly includes new, commonly used combined travel arrangements
- ensures greater market transparency by enabling all travellers to clearly identify whether they are being offered a package or not, thus avoiding confusion
- repeals special rules on brochures/printed information but ensures that travellers will still receive all the key information before signing a contract and that important news, for instance a change to the itinerary, is communicated in writing (including email).
- gives travellers new cancellation rights
- caps price increases at 10%
- provides clearer remedies and a better system of redress if something goes wrong, by tying in with the recently adopted EU legislation on alternative and online dispute resolution, new rules making travel agents liable for booking mistakes and a provision that gives travellers the option

² <http://ec.europa.eu/transport/passenger-rights/en/index.html>

³European Commission 'Communication from the Commission to the European Parliament, the council, the European economic and social committee and the committee of the regions - bringing the EU package travel rules into the digital age' July 2013 -

to address complaints or claims directly through the retailer from which they bought their holiday.

- streamlines the rules on contractual liability. Travellers will still have a single contact point if something goes wrong during the holiday, but since organisers are made liable for the performance of the services included, more traders will have incentives to be more diligent when choosing subcontractors.

3.3.2.3 General consumer law

Travel and tourism services (such as accommodation and car rental) are covered by general EU consumer law giving consumers protection against unfair commercial practices. This stipulates that traders must display the full price of products and services, must not use misleading advertising or trick consumers into buying a product they would not have bought otherwise.

There are also rules to cover online sales of travel services. These stipulate that sellers must give detailed information, including their contact details and a description of the product.

3.3.3 Growth of intra-European travel and tourism

Evidence shows that a large number of European citizens choose to holiday within the European Union, and the trend for intra-European travel is set to continue. According to a 2012 Flash Eurobarometer survey, 44% of respondents had holidayed in another EU country in 2011.⁴ This doesn't include all the people that travelled abroad for business purposes.

The trend for intra-European travel has increased in recent years, as financial concerns have influenced people's choice of destination. According to a May 2013 report by the European Travel Commission (ETC)⁵ "Cross-border demand rose in importance through 2012, at the expense of long-haul travel, as Europeans sought for cost saving opportunities to travel". A further ETC report, published in July 2013, confirmed that the trend is set to continue as: "data paints a positive picture for outbound travel from intra-European markets".⁶

3.3.4 Lack of existing data on cross border complaints

The ECC-Net (the Network of European Consumer Centres) appears to be the only organisation to collect consumer complaints about cross border issues in Europe. There are 29 ECCs – one in each EU country, plus Norway and Iceland.

⁴ Flash Eurobarometer 'Attitudes of Europeans towards tourism' 2012

⁵ European Travel Commission 'European Tourism - Trends & Prospects Q1 2013'

⁶ European Travel Commission 'European Tourism - Trends & Prospects Q2 2013'

Each ECC country gives advice on consumer issues and collects data on consumer complaints. These are collated at EU-level by ECC-Net. Other organisations deal with complaints about specific service areas – for example the European Car Rental Conciliation Service (ECRCS) - but these are not publicly available.

After initial background research, ANEC decided to conduct its own survey into complaints as existing data did not provide the in-depth data required.

3.3.4.1 ECC-Net complaints data

Complaints are divided into normal complaints (serious ones referred to the ECC in the trader country) and simple complaints (resolved by first contact with home ECC).

Fig 2: ECC-Net travel and tourism ‘normal’ complaints 2012, ranked by total number (top 15)

Rank	Classification (level 2)	Classification (level 3)
1	Transport services	Passenger transport by air
2	Accommodation services: n.e.c.	No value available
3	Transport services	Car rental
4	Transport services	Luggage transport by air
5	Package holidays	No value available
6	Accommodation services: timeshare and related/similar products	Discount holiday clubs
7	Accommodation services: timeshare and related/similar products	Timeshare
8	Transport services	Passenger transport by rail
9	Transport services	Passenger transport by road
10	Accommodation services: timeshare and related/similar products	Other related propositions
11	Accommodation services: timeshare and related/similar products	Resale
12	Transport services	Other purchased transport services
13	Transport services	Passenger transport by sea and inland waterway
14	Transport services	Luggage transport by road
15	Transport services	Combined passenger transport

3.3.5 Limitations of ECC data

There are limitations to the existing ECC-net data, which made it unsuitable for the purposes of ANEC’s research project:

- Not everyone is aware that the ECC exists so it may not be the first point of contact for cross-border complaints and dispute resolution. Therefore, it may only capture a small proportion of actual problems experienced.
- For complaints that are recorded by the ECC, information is not very detailed, simply categorising each complaint into the following:
 - Contract terms
 - Deceit
 - Delivery
 - Ethical aspects
 - Others
 - Price and payment
 - Product/service
 - Redress
 - Selling Techniques/unfair commercial practice

These categories are quite broad and do not give much detail about the problem experienced by the consumer. Following emails and telephone interviews with staff working on the ECC-Net database at the European Commission, it was confirmed that no further details about complaints are available e.g. the complainant's home country, the country in which the problem occurred or any additional details about complainant or the nature of complaint.

3.3.6 Existing tourism data

In addition to ECC-Net data, there are numerous statistics regarding European tourism available from government and industry sources – e.g. Eurostat and the European Travel Commission (ETC) - but the majority focus on tourism trends and destinations, with very limited data about satisfaction or complaints.

3.3.6.1 Eurobarometer 2012

The 'Eurobarometer survey on the attitudes of Europeans towards tourism' was a one-off survey, published in 2012, that collected EU citizens' views on travel, details of their holidays and travel and their expectations regarding holidays for the next year. Although Eurobarometer surveyed respondents about satisfaction, this mainly covered tourist aspects – such as natural features, how tourists were welcomed, and activities on offer – rather than key consumer issues.

4. RESEARCH METHODOLOGY

4.1 Objectives

The main objectives of this research project were to:

- Collect practical examples of consumer complaints in the area of European cross-border travel and tourism.
- Find out about the nature of problems experienced by consumers.
- Investigate how people respond to problems, whether they complain and, if so, which organisations they complain to.

4.2 Chosen methodology

As discussed in sections 3.3.5 and 3.3.6, existing data did not provide practical examples, or details of problems and complaints. Therefore we felt that the best way to get this information, and achieve the aims of the research project, was to conduct our own primary research, in the form of desk research and a survey.

4.3 Data collection

4.3.1 Desk Research

Desk research was carried out by internet research and telephone conversations with ECC-net staff at the European Commission to gather information about:

- Existing data about trends in European travel.
- Existing European complaints data related to travel and tourism.
- European policy related to travel and tourism.
- Existing consumer protection in the area of European travel and tourism (regulation, directives and standards).
- Ombudsmen, trade associations that deal with travel related complaints at a European level.

4.3.2 Survey

4.3.2.1 Survey management and design

The questionnaire was written by the project manager/ consultant, in liaison with members of the Services Working Group at ANEC. The online survey was hosted by Stiftung Warentest, a German consumer organisation.

Respondents accessed the survey by clicking on a link that directed them to the survey website. The front page of the website gave a choice of languages in which to view the questionnaire. After selecting a language, respondents were taken through to the survey itself.

4.3.2.2 Content of the survey

Focus on negative experiences

This was debated at the design stage but, as the main purpose of the survey was to collect practical examples about the types of problems people were experiencing, we felt that this was the best way to collect useful information, and avoid lots of irrelevant answers. If we had only asked people about their last trip we may not have captured much detail about negative experiences. Therefore people were asked to tell us about any negative experiences within the last 12 months.

Service categories

The six service categories (car rental, accommodation, train travel, plane travel, boat travel, timeshare/discount holiday clubs) and package holidays) were chosen because:

- They represented the key services that people would use when travelling abroad.
- They tied in with the categories used by ECC-net – see Fig 2 on page 10.

Modular design

The questionnaire adopted a modular approach. Respondents were presented with different 'modules' of questions for each of the services (e.g. car rental, accommodation) that they claimed to have used within the last 12 months. The reason for doing this was so that respondents would only be asked questions about the services they had actually used, thereby reducing the overall length of the questionnaire and making it more relevant to them. By doing this we hoped to minimise the number of people dropping out of the survey before completion.

A copy of the questionnaire can be seen in Annex 2.

Trends for booking

The following information, from the Eurobarometer survey 2012, proved useful in drafting our survey:

- Half (49%) of those who went on holiday in 2011 organised the various elements of their trip separately, rather than booking them altogether in one package – *our survey asks about plane travel, train travel, car rental and package holidays separately.*

- A majority (53%) of people used the internet to arrange their holidays – far more than used travel agents – *our survey includes questions about method of booking to include internet, mobile/tablet.*

Types of problems experienced

As detailed satisfaction/complaints data is not available at an EU level, we looked at published reports from national consumer and public interest organisations, covering topics such as timeshare, car rental and package holidays, to determine common reasons for complaint so that questionnaire responses could be tailored accordingly. We felt that predefining response categories would give us more robust, detailed results.

4.3.2.3 *Promoting the survey*

The project budget limited our opportunities to achieve a truly representative sample. To raise awareness of the survey, and generate responses, we relied on partner organisations to promote the link to our online survey to consumers in their countries.

Partner organisations

Eight organisations (in seven countries) agreed to participate in the project by promoting the survey link. These were:

1. Cyprus - Cyprus Consumers' Association
2. Czech Republic - Czech Association of Consumers TEST
3. Denmark - Taenk/Forbrugerradet (Danish Consumer Council)
4. Germany - Stiftung Warentest
5. Greece - NEW INKA Consumers Association
6. Greece - EKPIZO
7. Slovenia - Zveza Potrošnikov Slovenije (ZPS)
8. United Kingdom - Which?

For more details of partner organisations, and how they promoted the survey, please see table in Annex 1.

Criteria for organisations to approach:

- member of the EU
- strong consumer organisation with wide readership/membership base and capability to promote the link online

- medium to high number of residents travelling within Europe (based on Eurostat data)
- willingness to participate.

Ideally we would have liked to promote the survey in more European countries, but realistically we were limited by the number of consumer organisations that were willing and able to help.

Countries to target – based on outbound travel

Eurostat published a report in April 2013, which showed the percentage of residents from each EU country that holiday abroad. This was useful to our survey planning as it identified countries which might, potentially have the highest response rates.

Although we were unable to choose the countries, we were lucky to secure support from Cyprus (48%), Germany (34%), Slovenia (56%) and the UK (38%), as these countries have some of the highest percentages of residents travelling abroad for holidays – the vast majority of travel taking place within other EU countries.

4.3.2.4 Survey sample

Our survey sample is not truly representative of the EU population as a whole. Achieving a truly representative sample – of age, gender and geographical spread – was beyond the scope of this project due to budget constraints.

Our survey is intended to provide a 'snapshot' of EU citizens' experiences of travel and tourism services. For this reason, we do not believe that a representative sample is a necessity. As this survey has a European focus, it could be argued that the experience of anyone living in the EU carries equal weight – they are an EU citizen regardless of the country that they were born in, or the country that they live in. People from different countries or cultures might react differently to problems but the actual experience they have will essentially be the same.

The country that problems occurred in is probably more relevant, and our further analysis looked for trends related to this.

4.3.2.5 Sample limitations

When considering the results, the following limitations need to be taken into account:

- The link was promoted by consumer organisations in various countries so respondents may be more 'savvy' when it comes to consumer issues. They might be more confident about their rights or be more assertive when it comes to making a complaint.

- This was a self selecting sample. So only those that chose to take part were included. This may mean that they are more proactive, or that a desire to 'report' a recent negative experience motivated their choice to participate.
- This was an online survey so respondents were all computer literate and familiar with using the internet - this may have influenced how they book travel and tourism services.

However, we felt that these factors would not have a significant impact on the overall results.

4.4 Data analysis

The fieldwork was carried out from 2nd August to 8th September 2013. Results were analysed during September and October 2013.

4.4.1 Respondents

In total 5791 respondents completed the survey. Our base sample consisted of:

Fig 3: Survey base sample

Country of origin	Number of respondents	Percent of total
Cyprus	34	0.6%
Czech Republic	821	14.2%
Denmark	323	5.6%
Germany	1038	17.9%
Greece	225	3.9%
Slovenia	224	3.9%
United Kingdom	2933	50.6%
Other	193	3.3%
Total	5791	100%

The 'other' category included respondents living in more than 25 countries in Europe including: France, Netherlands, Spain, Italy, Belgium, Austria, Finland, Norway, Poland, Slovakia as well as Iceland and Croatia. For details of our sample demographics (gender, age and disability) see Annex 3.

4.4.2 European totals for travel and tourism

The survey was designed to collect detailed information about consumer experiences of seven different service types - car rental, accommodation, plane travel, train travel, boat travel and package holidays. In order to capture the required level of detail about the problems experienced, the responses were tailored to fit each service type. For example, the accommodation module contains an option for 'I was given a different room to the one I booked', which is not applicable to other modules, and the plane travel module contains an option for 'luggage delayed or lost' that is not applicable to modules such as car rental. For this reason it was not possible to combine results across all modules to get overall European totals.

However, where possible, we have grouped similar responses across all services to give an overview of the travel and tourism sector as a whole.

Section 5 provides a summary of results across all service types, where it is possible to do so. Sections 6 to 11 detail the research findings by service type.

4.4.2.1 Exclusion of timeshare category

Only 3% of people we surveyed had bought or used a timeshare or discount holiday club. As the base size for this category was relatively low (and therefore statistically weak) it has been removed from the more detailed analysis of different service types. However, responses to questions in this category are still included in the overall European totals.

4.4.3 Multiple modules

As this was a modular survey it was possible for one respondent to complete more than one module. For example, they might have hired a car, booked a flight and a hotel within the last 12 months. There was a limit of three modules per person so that each respondent could only be looped around the questionnaire a maximum of three times. The order that the modules were presented to respondents was randomised to ensure that results were not biased towards the first module in the list.

Each person could only submit information about one 'experience' per module/service category. For this reason, when referring to results by module we will refer to xxx% of respondents. However, when referring to combined results or European totals, results are described in terms of 'xx% of experiences' or 'xx% of problems' to account for the fact that there may be more 'incidences' than actual respondents.

5. KEY FINDINGS

5.1 Use of cross-border travel and tourism services

A total of 5791 people completed our online survey. The majority of respondents (91.5%) had used a cross-border travel or tourism service during the previous 12 months.

Accommodation was the most commonly used cross-border service. Two thirds of respondents (65.9%) had paid for accommodation in another country during the last 12 months. Plane travel was the second most used service, with 45.3% of respondents having taken a flight within Europe during the last 12 months. Just over a quarter of people (26.7%) had taken a package holiday.

Fig 4: Use of cross-border services

Q.2 During the last 12 months have you bought or used any of the following services in a European country other than the country you live in?	Base: 5297
Accommodation	65.9%
Plane travel	45.3%
Package holiday (e.g. a holiday that included flight and accommodation)	26.7%
Car rental	23.7%
Train travel	23.5%
Boat travel (e.g. ferry or cruise)	22%
Timeshare or discount holiday club	3%

5.2 Booking

Our research findings show that use of the internet was exceptionally high when booking cross-border travel and tourism services. As modern technology has advanced, the ways that people interact with service providers has changed. The growth of the internet makes online booking far more common and the growth of internet 'brokers' or price comparison sites that compare prices from a range of suppliers has increased significantly. This trend has changed the dynamic

between consumers and service providers, creating new concerns and potential problems.

5.2.1 Who booked with?

Across all service types more than half of people (58%) booked directly with the service provider. However 22.5% booked through an agent and a further 15.5% booked through a price comparison site.

Booking through an 'intermediary' can sometimes increase confusion for consumers. For example:

- Information provision - Who was responsible for providing the pre-contractual information, such as the description of the service; what's included; and photographs of the hotel? This information is vital to consumers when choosing tourism services so that they can make informed purchasing decisions. Consumers need this information to be reliable and accurate, and they need to know who to hold to account if services have been inaccurately described.
- Complaints - Who do they complain to if things go wrong? The company providing the service or the company that they booked the service with?

A male respondent from the UK booked his car rental through a comparison site. He told us: "It was difficult to know whether to take up the complaint with the company through which I booked, or the company that supplied the car. I took it up with the company through which I booked, but I have not yet had a response."

Fig 5: Organisation used to book travel/ tourism services - ALL SERVICES

Q. How did you book your [service]?	Base: 1430
Directly with the service provider	58%
Through an agent	22.5%
Price Comparison site	15.5%
Other	21.4%

It is important to remember that the choice of who to book services with is limited by what is available. For example, there are a number of price comparison sites offering car rental and accommodation. This is reflected in the survey findings as 31.6% of people booking car hire did so through a comparison site and 24.6% of those booking accommodation. In contrast, only 2.4% of people booking train tickets did so through a comparison site and only

0.9% of people booking boat trips. Train services and boat travel rarely feature on comparison sites so these services are more likely to be booked directly with the service provider or a travel agent.

More detailed information about how people book individual service types is contained in the individual service sections of this report (sections 6-11).

5.2.2 Legal question of liability

The wording of the 1990 Package Travel Directive (PTD) does not make it clear who - operator or third party agent - is liable if things go wrong. It implies that both are liable, which does not offer practical help to the consumer. The PTD is currently under review and, during the consultation process, BEUC called for the revised directive to address the growing trend of sales through intermediaries by establishing clear rules on liability. BEUC claims that: "The practical application of the liability rules of the PTD often results in the dismissal of a legal claim by a consumer, when suing the retailer instead of the organiser."⁷

The European Commission's proposals for the revised Package Travel Directive do address the issue of liability, making travel agents liable for booking mistakes. It gives travellers the option to address complaints or claims directly through the retailer from which they bought their holiday.

5.2.3 Method of booking

The method used to book services varies by service, and is dependent on a number of factors. Firstly, is this a service that people are likely to book in advance or simply as and when they need it? For example, people are more likely to turn up at a train station without a pre-booked ticket than they are to turn up at an airport. This is backed up by our survey results, which showed that just over a third of people (35.1%) booked their train tickets in person, compared to 7.3% for air travel.

Another factor could be the complexity of the service and the amount of money being spent. Our results show that the service most commonly booked in person was package holidays - 24.6% of people booking a package holiday did so in person. This may be because they wanted to seek advice and discuss the details of what they want, rather than just click and book. In contrast, services where consumers feel that they need less advice, such as car rental or accommodation, are less likely to be booked in person, with the majority of bookings taking place over the internet.

Overall a huge 80.9% of respondents booked their travel/tourism service via the internet. This could include websites, web forms or email. Internet booking was

⁷ BEUC response to the questionnaire for consumer organisations on the review of the Package Travel Directive http://ec.europa.eu/consumers/rights/responses/BEUC_en.pdf

most common with car rental (81.6%), air travel (79.5%) and accommodation (73%). It was least common with train services (46.8%).

Our results show that booking by post is almost obsolete. Overall, only 0.6% of bookings were made by post. Almost as many people use apps to book as they do book by post. Breakdowns of how people book individual service types are detailed in sections 6-11.

Figure 6: Method of booking – ALL SERVICES

Q. What method did you use to book your [service]?	Base: 1430
Internet	80.9%
In Person	17.6%
Telephone	13.2%
Other	4.6%
Post	0.6%
App	0.4%

5.3 Problems experienced

Of all the respondents who had used one of the seven cross border services listed, more than a quarter (26.8%) reported that they had had a negative experience. Car rental, plane travel and train travel are the cross border services that people report having the most problems with.

Fig 7: Problems with cross border services – BY SERVICE

Q.3 Did you have any negative experiences or problems with your [service]?	Base: 1420
Car rental	22.4%
Plane travel	16.1%
Train travel	15%
Package holiday	14.2%
Accommodation	10.4%
Boat travel	8.4%
Timeshare or discount holiday club	8%

5.3.1 Type of problem

As detailed in the 'data analysis' section of the Research Methodology, it was impossible to collate responses about the nature of the problem experienced across all services. Consumers face different problems when using different services so, to capture the greatest level of detail possible we tailored the individual modules of the questionnaire to fit different services, listing responses that were specific to that service. For example, the module on air travel would have listed delays, cancellations, lost luggage and standard of food as possible responses, whereas, for example, none of these would be applicable to car rental. For more detailed information about problems experienced with individual services see Sections 6-11 of this report.

For this reason we cannot give a comprehensive overview of the problems experienced. However, there were some issues that were common across all services. These are shown in the table below. More than a quarter (28.7%) of respondents booking tourism services said that they were dissatisfied with the poor quality of the service they were using. This covered issues such as cleanliness and state of repair. Poor customer service was also a common cause for complaint. Additional charges were also high on the list, with 18.8% of negative experiences being caused by the unexpected addition of fees and charges to the bill.

It is important to note that the table below only collates responses that were common across all services. For example, delays and cancellation are not shown – although these problems were commonly experienced by users of air and rail services.

Fig 8: Nature of problem – ALL SERVICES

Q. What was the main reason(s) you were dissatisfied with your [service]?	Base: 1420
Poor standard of...	28.7%
Poor customer service	21.6%
Additional charges that I was not expecting	18.8%
Information given was unclear	16.8%
Lack of information	16.1%
Poor choice/unable to book exactly what I wanted	12.2%
Total cost different to that agreed	8.3%

Special requests not provided	7.2%
Dispute over cancellation/refund	7.1%
No record of my booking when I arrived	3%

5.4 Experience of travellers with disabilities

According to the European Commission, more than one in five people in Europe find travelling difficult due to old age, disability or reduced mobility.⁸

In total 7.4% of our respondents told us that they had a disability. Our results show that, in the main, disabled travellers were less likely to experience problems than consumers without disabilities. Overall 23.2% of people with a disability had a negative experience whilst travelling in the EU, compared to 27.1% of consumers without a disability.

Passenger rights legislation gives certain rights to plane and train passengers who are disabled or have reduced mobility. This could explain why our disabled respondents did not experience significantly more problems in these areas.

However, car rental was one area in which disabled passengers experienced a higher proportion of problems - 26.1% of passengers with a disability experienced problems with their car rental, compared to 22% of passengers without a disability.

Although the level of problems was not significantly different overall, travellers with disabilities seemed to experience different types problems in some areas. Two of the most common causes for complaint for travellers with disabilities were a lack of choice when it came to booking and discovering that the service they received was different to that requested (either by being given something different on arrival or not having specific requests met).

Details about the nature of problems experienced by people with disabilities in different service sectors are discussed in sections 6-11 of this report.

When reading these sections it is important to bear in mind that only 7.4% of our total respondents had a disability so when breaking down these sample sizes by service type, and various questions within these, the base sizes are extremely small. This means that, when it comes to the experiences of disabled travellers, percentages shown are not statistically significant, but simply an illustration of trends.

⁸ <http://ec.europa.eu/transport/passenger-rights/en/30-disabled-persons-and-persons-with-reduced-mobility.html>

5.5 Complaints

Our survey shows that seven out of ten (69.2%) respondents that experienced a problem made a complaint. However, this could be to any source, including family and friends and posting negative internet reviews, as well as official complaints to service providers, trade associations, ombudsmen and European Consumer Centres.

On analysing the results further it became clear that complaints were focused in two areas – service providers and ‘spreading the word’ to other consumers. Respondents were not shy about complaining to service providers. And many told friends, family, media or other internet users about their negative experience. However, very few respondents took complaints any further.

5.5.1 Making complaints

5.5.1.1 Service providers

Six in ten people (61.1%) making a complaint took up the matter directly with the service provider. People appeared more likely to register a complaint with accommodation providers and car rental firms than with other services.

Respondents seemed least likely to register a complaint with train service providers. One reason reported by several passengers was that they felt delays and cancellations were not the fault of the provider (possibly due to adverse weather conditions). Others mentioned that the delay did not significantly affect their holiday or that the amount of money involved was not worth pursuing. Others protested that they wanted to complain but that it was difficult to find train staff to complain to. Detailed feedback, with quotes from passengers, is contained in the ‘Train Travel’ section of this report (see section 8).

Complaining to service providers can take two forms:

- **Complaining to the service provider during service provision** – this can be beneficial as it gives the company a chance to remedy the situation, minimising the negative experience. But this can only work if it is possible to resolve the issue on the spot. For example, one happy customer returning to the UK on the ferry told us: “Most of the ferry window was covered with paint. I raised this as a minor issue at Reception. I was subsequently emailed by P&O who offered a refund on the extra cabin cost for the ‘view’ and I was upgraded to Club Class on the return trip. A very satisfactory outcome”.
- **Complaining after the service has been used** – many people waited until they had returned home to raise an issue with the service provider. But, our survey responses showed that correspondence was often ignored

or that, in many cases, it was difficult to achieve a satisfactory resolution “once they had your money”.

Our survey did not ask how complaints were made to service providers – whether they were made during or after the service was provided and which was more successful overall – but from the open feedback there was a general feeling that complaints made at the time were more likely to achieve effective and satisfactory results.

Our respondents highlighted feedback forms, given out by providers after use of the service, as another way to feedback dissatisfaction. Many people felt that because they had filled in a company questionnaire/feedback form at the end of their trip they didn’t need to make an official complaint. However, very few reported getting any further contact from a service provider following a complaint made in this way, which raises doubts about whether companies read and act on such feedback, and also whether it is a recommended way to make a complaint.

5.5.1.2 Complaints not escalated

Only a tiny fraction of complainants took the matter further - for example to an ombudsman, trade association, ECC or other consumer organisation.

Interestingly only very small proportion (1.6%) of people that experienced a problem reported their complaint to a European Consumer Centre (ECC). This supports our initial concern that the complaints data collected by the ECC represents only a fraction of problems experienced by consumers.

Rather than turning to official sources, our findings show that dissatisfied complainants are most likely to tell family and friends about their experience, or leave negative reviews online. This may suggest that they don’t know who to turn to if complaints are not dealt with satisfactorily by the service provider.

5.5.1.3 Spreading the word

Overall 37.6% of respondents turned to friends and family to complain about their experience, possibly to make them aware of the issues and to prevent them from experiencing the same problems.

Overall, almost one fifth (19.8%) of respondents that experienced a problem told us that they’d posted a review of the incident online. As the internet has grown so too have consumer review sites, such as Trip Advisor, where people can leave feedback about their experiences. Online feedback and reviews are an increasingly important part of consumer decision making. In its 2012 report, ‘In my honest opinion’, UK consumer watchdog, ‘Consumer Focus’ said: “As consumers undertake an increasing proportion of their interactions and transactions online they are turning to peer-review as a trusted source of

information.” It gives evidence that consumers are putting greater trust in their peers rather than more traditional sources:

- A 2012 survey by Consumer Focus found that more than 62% of consumers trust what other consumers tell them more than what companies say.
- Research from the USA by Nielsen found that 68% of social media users go to social networking sites to read consumer feedback on products and services, with over half using these sites to provide product feedback.
- A 2012 survey of internet users in Britain by Reevoo found that 88% of consumers consult reviews when making a purchase, and 60% said they were more likely to purchase from a site that has customer reviews.

As review sites are so widely used, and trusted, by consumers they can be an effective way to generate negative publicity about a service provider that has treated a consumer badly. If a consumer feels that they a service provider has not dealt with the problem effectively, reviews might also be seen as a therapeutic way to vent their anger. One female respondent from Germany said of her poor experience on the night train from Germany to Paris: “I left a review, it helped me to get rid of my anger and others can decide if they want to use the sleeper night train despite this assessment.”

This trend for ‘spreading the word’ should be a key motivator for service providers to deal with complaints more effectively, because if they do not take complaints seriously they could lose business through word of mouth.

Fig 9: Where complaints were directed – ALL SERVICES

Q. Who did you make a complaint to?							
	All services	Car rental	Acc	Train	Plane	Boat	Package holiday
Direct complaint							
Service provider	61.1 %	67.1%	70.5%	37.7%	51.3%	60.7%	63.2%
'Spreading the word'							
Family/friends	37.6%	30.9%	37.9%	44.2%	42.1%	51.7%	28.8%
Media	1.8%	3.7%	0.7%	0%	2.5%	0%	1.3%
Internet review	19.8%	17.3%	30%	15.4%	14.9%	20.7%	16.3%
Further complaint							
Trade association	3.3%	0%	5.7%	0%	5%	3.4%	1.3%
Independent dispute res	1.4%	0%	0.7%	0%	3.3%	0%	1.3%
ECC	1.6%	2.5%	1.4%	3.8%	0.8%	0%	0%
National consumer org	6.6%	6.2%	5.7%	3.8%	8.3%	6.9%	6.3%
Legal action							
Court	1.8%	1.2%	0.7%	0%	4.1%	3.4%	1.3%

5.5.2 Satisfaction with outcome of complaints

5.5.2.1 Service provider

Although a large proportion of people experiencing a problem made a complaint to the service provider, most were not satisfied with the outcome of their complaint. Across all services, 53.9% of respondents were 'not at all satisfied'.

Fig 10: Satisfaction with complaints to service providers – ALL SERVICES

Q. How satisfied were you with the outcome of your complaint?	Base: 286
Not at all satisfied	53.9%
Slightly satisfied	19.9%
Satisfied	11.5%
Very satisfied	3.9%
Completely satisfied	0.4%
Still being dealt with	10.5%

But levels of satisfaction varied depending on the type of service used. For example, companies providing boat services, flights and car rental appeared to be particularly poor at dealing with complaints (see fig 11 below).

Fig 11: Respondents 'not at all satisfied' with outcome of complaint to service provider – BY SERVICE

Q. How satisfied were you with the outcome of your complaint to [service]?	Not at all satisfied
Boat travel	65%
Plane travel	64.1%
Car rental	55.9%
Train travel	52.2%
Package holiday	50%
Accommodation	38.8%

Almost two thirds of people who had complained to the service provider about boat travel (65%) and plane travel (64.1%) were 'not at all satisfied' with the outcome. By comparison, organisations providing accommodation appeared to be better at dealing with complaints with only 38.8% of respondents reporting that they were 'not at all satisfied' with the outcome of their complaint.

5.5.2.2 Further complaints

Only a very small proportion of respondents with a problem took their complaint further, for example to a trade association, independent dispute resolution (ombudsman etc), the ECC or a consumer organisation in their own country.

Overall, respondents seemed a little happier with the outcome of their complaints to these organisations, than they did with their complaints directly to the service provider. But a large number of people were still dissatisfied. Of those whose complaint had been dealt with, 40% were not at all satisfied and 38.2% were only slightly satisfied. Only 3.6% claimed to be 'completely satisfied' with the outcome of their complaint.

Fig 12: Satisfaction with outcome of further complaint

How satisfied were you with the outcome of your further complaint?	Base: 55
Not at all satisfied	40%
Slightly satisfied	38.2%
Satisfied	14.6%
Very satisfied	3.6%
Completely satisfied	3.6%

Base sizes were too small to break down these results by service type, or by individual organisations contacted.

5.5.3 Reasons for not complaining

If people had not complained we wanted to know why. The main barrier to complaining seems to be lack of confidence that it would achieve anything. Of those that gave a reason for not complaining, four in ten people (41.2%) said they held back because they did not think their complaint would be successful. 16.8% did not complain because they worried that the service provider would not respond well. For 15.7% of respondents, the main obstacle was that they did not know who to complain to.

In some cases, for example where an intermediary had been used to book a service, there was confusion about where to direct complaints – to the company booked with or the company actually providing the service.

When it comes to further complaints people may not just be aware of the options available to them. One person left a comment on the survey saying "I greatly appreciate the list of people who I should have contacted and will still

do so; at least it might save others getting caught out.” The ECC offers a useful service to consumers with complaints, but levels of complaint to the ECC were very low. This suggests that people simply are not aware of the ECC and the help it can offer in cross border complaint resolution.

Fig 13: Reason for not complaining to service provider

Q. If you didn't complain to the service provider, why not?	Base:677
I didn't think that my complaint would be successful	41.2%
Other	33.2%
I didn't think that the service provider would respond well	16.8%
It seemed too complicated/ difficult	16.4%
I didn't know who to complain to	15.7%
I wasn't sure about my rights as a consumer	10.5%
I want to but haven't had time	8.6%

There were many 'other' responses to this question. Several people said that they had not complained because it simply was not worth it financially. One Slovenian respondent explained: "I did not complain because the amount of money was not big enough for me to lose time over it."

Others said that they did not need to complain as other travellers had already raised the issue. Many simply said that, instead of complaining, they preferred to 'vote with their feet' and simply would not use the offending company again.

5.5.4 Form of compensation

Several respondents mentioned that the service provider had offered them a voucher or discount on using the service again. However, some felt that this form of compensation was useless as they did not want to use that provider again following the negative experience they had had.

Although satisfaction with complaints to service providers was generally low, of course there were people who were happy with the outcome of their complaint. One respondent from the UK told us: "the hotel understood our complaint and have offered remuneration in the form of a free seven days in 2014".

6. CAR RENTAL

6.1 Booking

The majority of respondents (39.7%) booked their car rental directly with the company itself. The second most popular method of booking was via a price comparison site (31.6%).

Fig. 14: Car rental - organisation booked with

Q. How did you book your car rental?	Base: 310
Directly with car rental company	39.7%
Price comparison website	31.6%
Travel agent	12.3%
Other	10.7%
Airline	6.1%
Total	100%

'Other' methods included booking via a hotel reception or villa company. A number of respondents told us that they had booked through a 'car broker', then went on to give the name of a site that we would consider to be a price comparison site. So the use of price comparison sites may be even higher than listed in the table above.

Fig. 15: Car rental - method of booking

Q. What method did you use to book your car rental?	Base: 310
Internet	81.6%
In person	9.7%
By telephone	6.5%
Other	1.3%
By post	1%
Total	100%

6.2 Problems experienced

The most common cause for complaint amongst people renting cars was unexpected additional charges. There were many recurring complaints, which are detailed in section 6.2.1 below.

Fig 16: Car rental - nature of problem

Q. What was the main reason(s) you were dissatisfied with your car rental?	Base: 307
Additional charges that I was not expecting (e.g. for refuelling or damage to car)	51.5%
Poor customer service	34.9%
Total cost different to that agreed	21.8%
Poor standard of car (e.g. cleanliness, state of repair)	19.5%
Given a different size/ type of car to the one I booked	15%
Information given was unclear	14.3%
Service not as described	8.1%
Lack of information	7.2%
Dispute over cancellation/ refund	5.9%
Poor choice/ unable to book exactly what I wanted	4.6%
Special requests not provided (e.g. child car seat)	2.3%
No record of my booking when I arrived	2%

6.2.1 Additional charges

The most common problems were with fees and charges. More than half (51.5%) said that they were unhappy with unexpected additional charges. And 21.8% reported that the final cost was different to what had been agreed. In many cases problems were exacerbated by information being unclear – as people were not aware of the full cost of charges before committing themselves to the rental.

Many people complained about charges being unclear, unfair and added after they thought the rental agreement has been completed. One respondent from Slovenia, renting a car in Ireland, told us: "The booking price on the internet

was approximately €280, but when we collected the car the price was twice as much.”

6.2.1.1 Insurance and other extras

In many cases extra fees, often in the form of insurance, were added when respondents went to collect their cars. One UK driver told us: “The add-on costs for car hire at Palermo airport were more than the actual rental price I had paid in advance. These included damage waiver, airport surcharge, the Italian equivalent of road tax and several others I can't remember. A true rip off.” One male respondent from the UK complained about “pushy sales staff (in Portugal) trying to sell us extras that we did not want, such as excess insurance cover.”

Other travellers were told that they needed to spend extra money on insurance cover, which they already had. A female respondent from Germany said: “We had to purchase additional insurance for glass damage, even though we had purchased a fully comprehensive insurance.” “We were forced to buy accident waiver, despite this being included in our original booking”, complained a UK driver hiring a car in Portugal. A Danish man renting a car in Spain complained that he was “forced to buy an unwanted ‘local insurance’ at 3 am in order to get the car”. A UK driver in Spain reported “Extreme pressure to purchase insurance from the car rental company when I already had annual policy.”

A UK traveller summed up the practice by saying: “Car hirers compete on the basic car rental price, in order to get ‘Best Buy’ on price comparison websites. They then pressurise customers to buy their car insurance.” Another German respondent said: “It is very difficult when renting cars abroad to understand and classify the insurance conditions.”

6.2.1.2 Charges taken without approval

Another common grievance was having charges added to the bill after returning the vehicle. In many cases it seems that this was done once the consumer had returned home. Many had been hit with extra charges on their credit/debit card several days, weeks or even months after hiring the car.

One UK respondent told us: “Several months after returning to the UK I was sent two parking fines and a ‘driving down a restricted road’ fine of which I was totally unaware during my stay in Sicily. I took great care to park legally while there and the internet tells me this is a huge scam.” Another UK respondent said: “I was charged €900 for a small scratch to the bumper, which was already scratched. No chance to object. This was charged to the credit card two months after the holiday.”

Several complained about not having any control over these charges. The company already has the customer's payment card details so it can then take

further charges automatically, without seeking consent. In many cases it seems to be the consumer's responsibility to query charges and try to get a refund.

6.2.1.3 Fuel

There appear to be lots of different policies regarding fuel, which is confusing for consumers. Some companies operate a full-empty policy, where you are given the car with a full tank of petrol (for which you are charged) but then have to return the car with an empty tank. If the fuel isn't used, no refund is given. There were numerous complaints about this practice with people calling it 'a scam' and 'a rip-off'. Several people complained that they hadn't driven the car enough to use up the full tank of fuel. Others complained about the exorbitant cost of refilling the car – they felt that the car rental company was charging much more than the 'going rate' for fuel and one claimed that the tank physically couldn't hold the amount of petrol they were charged for.

A UK respondent hiring a car in Spain complained that the company "insisted on providing a full tank of fuel at an inflated price and gave no refund for unused fuel on return". Another said "we needed to return the vehicle with an empty tank having paid for a full tank. To do this is impossible." One German respondent told us that the French rental firm he'd used charged "an excessive price per litre for refuelling."

Other companies appear to operate a full-full policy where you have to return the car with a full tank and are charged if you do not do so. This can be tricky if there is no petrol station close to the airport, or you are rushing to catch a flight.

One UK driver claimed that he was overcharged for refuelling a car that had broken down. "I had a full-to-full fuel agreement, but the car broke down. It had 3/4 tank when it was collected by the tow truck. I was charged over €48 to refuel - the pump price would have been about €14 for 1/4 tank of diesel for a Ford Fiesta."

6.2.2 Holding of deposits

Some companies ask for a large deposit to cover potential damage, which is deducted from the customer's credit card, and should be refunded if and when the car is returned intact. However, several respondents reported problems getting deposits returned. A UK respondent reported problems getting a €1,000 deposit returned when he hired a car in Portugal. "The car hire company took a €1000 deposit to cover possible damage when I refused to buy their additional insurance (I already had my own). After the car was returned (undamaged) the deposit was not returned until two months later and three e-mails chasing them."

A female traveller from the UK complained: "They put a 'hold' on a large deposit on our cash card but still haven't released it five days after returning the car".

6.2.3 Poor standard of vehicle

A fifth of people who had hired a vehicle said that they were dissatisfied with the standard of quality. One told us: "the car broke down on motorway after about 15 minutes driving and the breakdown truck sent by the hire company towed the car away but left me and my suitcase at the side of the motorway".

Some issues bordered on unsafe. One traveller to Austria complained: "The child booster seat that was supplied was poor quality. The first one was actually broken in half and the second one kept slipping out of the seat belt."

6.2.4 Disputes over damage

Many respondents reported being charged for damage that they hadn't caused, highlighting the need to check the car carefully and get any damage signed off by a member of staff before leaving the office. However, there were reports of staff being unwilling to do this on collection. A UK traveller to Spain told us: "When we collected the car the agent did not wish to check the vehicle with us and stated it was ok. We noticed bumps and scratches and asked them to take a look, but they would not and again said it would be ok. When we returned the car at the airport the agent went over the vehicle with a fine tooth comb. We had a real issue with the staff at the desk who refused to listen to our experience and insisted we pay for all the damage to the car. We spent at least 30 minutes trying to talk to them, which got more heated as the time went on. We asked them to contact the resort to verify what we were saying but they refused. Eventually one of the agents checked the computer and I think they could see that all the issues were actually already noted and then they just told us to go. There was no apology. I was very upset about the incident."

One UK respondent who hired a car in Greece told us: "The car had so many dents and scratches on it, it was difficult to make sure all were recorded on picking up the car. On return the hirer claimed that one of the smaller scratches on the car was new. I could not remember any event that could possibly have caused it. It could have happened when parked, but I suspect it had been deliberately left off the list of previous damage. The fee charges would have more than covered the repair of all the scratches on the car." He tried to resolve the issues with the service provider but they "kept arguing until it was so late I would have missed my plane home."

Another UK traveller to Spain told us: "I have never seen so much bodywork damage to a car than that which was presented to us to use. They refused to give us another car, so I had to photograph every part of the car that was damaged (including no radio aerial) before I drove away. On return, they tried to

charge for the missing aerial, but accepted my photograph (dated and timed) as evidence that it had always been missing and did not charge me.”

6.3 Disabled travellers

Our survey results showed that travellers with disabilities experienced a higher proportion of problems (26.1%) with their car rental than consumers without disabilities (22%). The nature of the problems experienced was quite different. Disabled passengers may need a specific type of car to suit their needs, but our respondents experienced difficulties getting what they wanted. One of the biggest causes of dissatisfaction for disabled travellers was ‘poor choice/unable to book exactly what I wanted’ - 16.1% of disabled travellers gave this as their main reason for dissatisfaction, compared to 3.2% of people without a disability. Over a fifth (22.2%) said that they had managed to book the right car, but had been given a different size or type of vehicle on arrival. For travellers without a disability this was only 14.3%.

Another marked difference was in information provision - 27.8% of disabled travellers said that the information they were given about the service was unclear, compared to only 14% of travellers without a disability.

Disabled travellers renting cars also seemed to experience more problems when it came to disputes about refunds/cancellations – 22.2% cited this as their main reason for dissatisfaction compared to only 5% of travellers without disabilities.

6.4 Complaints

6.4.1 Complaints to service providers

More than two thirds (67.1%) of people that experienced a problem with their car rental complained directly to the service provider. The most common reason for not complaining was ‘I didn’t think my complaint would be successful’ (42.6%) followed by ‘I didn’t think that the service provider would respond well’ (23.8%).

Almost a fifth (17.8%) said that they didn’t know who to complain to. This could be a reflection of how many rented cars are booked through price comparison sites, which creates confusion about who is responsible for errors. 16.8% of respondents said that they didn’t complain because they weren’t sure about their rights.

A few admitted that they didn’t complain because all the charges were detailed in the contract. One UK respondent said: “I should have read the small print”.

Despite the relatively high number of complaints, many were dissatisfied with the way that their complaint was handled. More than half (55.9%) were not at all satisfied with the outcome of their complaint. And 13.6% were only slightly

satisfied. Only 15.3% of those that complained to the service provider felt satisfied with the outcome of their complaint. It seemed quite common for complaints to take weeks or even months to resolve. A high number of people claimed that companies had failed to respond to complaints at all.

One disgruntled customer told us: "The complaint was not dealt with to our satisfaction but we left it at that. We will not use the company again and will check out future car hire companies more carefully."

6.4.2 Further complaints

When it came to taking the matter further people were more reluctant to complain. None complained to a trade association, ombudsman or independent dispute resolution, which would suggest that they did not complain to the European Car Rental Conciliation Service (ECRCS), that deal with complaints about its members (six well known rental companies including Hertz, Budget, Avis and Europcar). Only 2.5% complained to the ECC. A very small number of people with a complaint about car rental (1.2%) took the matter to court.

However, people were very keen to spread the word about their poor experience. 30.9% told family and friends and 17.3% posted a negative internet review. Several people reported that they had also complained to their credit card provider, when trying to dispute charges.

7. ACCOMMODATION

7.1 Booking

Our results show that people are most likely to book accommodation directly with the service provider (37%). Price comparison sites are also popular (24.6%).

Fig 17: Accommodation – organisation booked with

Q. How did you book your accommodation?	Base: 403
Directly with the service provider	37%
Price comparison website (one site that compares prices from multiple companies)	24.6%
Travel agent	14.4%
Other	14.4%
Tourist Office	8.4%
Airline	1.2%
Total	100%

The preferred way to book accommodation was via the internet (73%). However, 10.9% of respondents had booked in person and 9.7% had booked over the telephone

Fig 18: Accommodation - method of booking

Q. What method did you use to book your accommodation?	Base: 403
Internet (email/ website)	73%
In person	10.9%
By telephone	9.7%
Other	6.2%
App (mobile/tablet)	0.2%

7.2 Problems experienced

7.2.1 Poor quality

Almost half (47.2%) of people who had experienced a problem said that they were dissatisfied with the poor standard of their accommodation. In many cases this was to do with cleanliness and the state of repair of the room and its facilities. The most frequent comments appeared to be about:

- Air-conditioning – either not working or not present when promised; and
- Noise - from traffic noise, roadworks or some other outside interference or, most commonly, from other guests. Complaints were that the management had not dealt effectively with the disturbance.

A German visitor to France told us: "There was no shower, just a bathtub with no curtain. The accommodation was damp and musty, with mould in the cupboards". Another traveller to France had a run of bad luck when it came to utilities. "The air con did not work. There was no electricity one night and no hot water another night."

A German woman travelling to Spain said: "The room was very dirty with partly broken furniture. The staff were not interested. I ended up buying cleaning supplies to clean the room and changing the defective light bulb on the balcony myself."

A male traveller to France told us: "The hotel had a neglected look, furniture was shabby, air conditioning did not work, outdoor pool visibly dirty and not usable, breakfast fruit salad consisted of tinned ingredients [not fresh]."

7.2.2 Not getting what you asked for

Many travellers were upset when the accommodation did not live up to their expectations. Of course the expectations that people have will vary. But in some cases the accommodation wasn't as described. In other cases people had booked a specific room type only to be given something different on arrival. Even worse, some people were given a totally different hotel to the one that they had booked.

7.2.2.1 Not as described

A fifth of respondents (21.6%) told us that their accommodation was not as described. A male German traveller to Spain told us: "The description/pictures and the actual state of the hotel differed significantly from each other". Another German respondent travelling to Austria complained: "The accommodation was advertised as having a restaurant, with a special note saying 'the chef cooks good local cuisine'. When we arrived the restaurant had closed completely."

A Slovenian woman arriving at a London hostel late at night told us: “The photo advertising the room did not make it clear that there were some more or less regular tenants living in there and they were using all the other beds as well. The room was messy – I felt like I was in an untidy student dorm. There was no pillow or blanket on my bed. As a sign of protest I left the fifth floor with my big suitcase and walked down to the reception, and told the receptionist that I would rather sleep sitting on the couch than in that room. The receptionist let me ‘hide’ in a vacant room for the night. At least I had some peace and quiet to sleep, and a room to myself.”

Fig 19: Accommodation - nature of problem

Q. What was the main reason(s) you were dissatisfied with your accommodation?	Base: 398
Poor standard of accommodation (e.g. cleanliness, state of repair)	47.2%
Accommodation not as described	21.6%
Poor customer service	19.1%
Poor standard of food	16.1%
Information given was unclear	15.1%
Noisy room (e.g. close to elevator or construction site)	15.1%
Different size/ type of room to the one I booked	14.1%
Lack of information	11.3%
Moved to a different accommodation	8.8%
Poor choice/ unable to book exactly what I wanted	7%
Total cost different to that agreed	6.8%
Additional charges that I was not expecting (e.g. telephone or mini bar)	6.3%
Dispute over cancellation/ refund	5.8%
Special requests not provided (e.g. adjoining rooms, disabled access, baby cot)	5%
No record of my booking when I arrived	3.5%

7.2.2.2 *Different room*

Fourteen per cent (14.1%) complained that they were given a different size/type of room to that booked. In one extreme case, a couple turned up to the property they had booked in France to find that the owner had sold it. "He said he forgot to tell us", they said.

7.2.2.3 *Different hotel*

Surprisingly 8.8% of people who had experienced a problem with cross border accommodation had been moved to a completely differently hotel than the one they had booked. One Slovenian respondent told us: "The room I had booked was rented out to some other guests and they sent me to another hotel (where the accommodation was much more expensive)."

Another Slovenian said: "Seven hours before we were supposed to set off to the hotel we had chosen and paid for, the travel agent called to tell us that there was no room for us in that hotel. They gave us two options – to choose between two islands. Even though we told them we did not want to go to an island because of our fear of ferries, and that they should find us a place to stay on the mainland, they did not listen to us and we ended up on an island nevertheless. On this island the beach was much further away than the one we had chosen ourselves, the rooms in the annexe were almost all the same, only the hotel was of a higher category (by one star), which was of no importance to us. We simply did not get the destination we wanted, although we had paid for it."

7.3 Disabled travellers

'Poor choice/unable to book the room I wanted' was cited as the main reason for dissatisfaction by 11.5% of disabled travellers and only 6.8% of those without disabilities. 'Lack of information' about accommodation when booking was a problem for 19.2% of disabled passengers, compared to 11% without disabilities.

Another quite startling difference was in the level of customer service received. Our disabled respondents seemed likely to receive better customer service – only 7.7% cited 'poor customer service' as a reason for dissatisfaction compared to a fifth (20%) of those without disabilities.

7.4 Complaints

Seven out of ten people who experienced a problem with their accommodation made a complaint to the service provider. It may be easier to complain directly about accommodation, compared to other travel services, as members of staff are usually there to deal with complaints on the spot.

Several people reported that, on complaining to the hotel reception about their room, they were moved to a larger/better room. So complaining on the spot – where possible – can be effective in getting immediate resolution.

But not all complaints were successful. Only 20% of respondents were satisfied with the outcome of their complaint to the service provider. 38.8% were not at all satisfied and 30.6% were only slightly satisfied. Several people felt that language barriers had made complaint resolution more difficult. One UK traveller to Italy told us: “During an overnight stay, in an Italian hotel, the hotel's air conditioning failed (on a particularly hot night) and so when I came to pay the bill, the following morning, I asked whether there would be a reduction in the price as compensation for the inconvenience and discomfort. Unfortunately I do not speak much Italian and the receptionist feigned a lack of understanding of my English yet she had clearly been able to speak it fluently on the previous evening when talking to another English guest.”

When it came to further complaints, 37.9% of respondents complained about their experience to friends and family. 30% posted a negative review online – this is much higher than for some other types of service but there are lots of review sites for hotels, including popular ones like Trip Advisor, making it relatively easy to leave feedback about accommodation.

One German respondent complained about the difficulties of amending a booking that he had made through a comparison site. “I managed to shorten my hotel stay only with very great difficulty, enormous phone bills and anger! In future I will only book the hotel directly and not through price portals, even if it is slightly more expensive. It is just too complicated to achieve something there!”

8. TRAIN TRAVEL

8.1 Booking

It is evident that people book train tickets in a different way to other tourism services. They are far more likely to book tickets directly with the train company (68.8%) and in person (35.1%) than they are to use intermediaries.

8.1.1 Language barriers

In terms of cross-border travel, language barriers seem to present a bigger problem when transactions are done in this way. Instead of relying on a professionally translated website, or telephoning a designated member of staff who can speak other languages, travellers have to rely on random members of staff at the station to communicate in their preferred language.

There also appeared to be issues with signage in stations and lack of information about timetables and fares that would make the booking process easier. Many people complained that they did not understand which ticket was needed, where to get their train from or special conditions regarding the use of tickets. For example, that they needed to be validated before travel, or that they were only valid on specific services.

Of course, there should not be an expectation that all members of staff are multilingual. But, where possible, consumers should be able to access important travel information (such as timetables and information about ticketing and complaints) in a choice of languages.

Fig 20: Train travel – organisation booked with

Q. How did you book your train travel?	Base: 205
Directly with the train company	68.8%
Other	18%
Travel agent	8.3%
Price comparison website (one site that compares prices from multiple companies)	2.4%
Tourist Office	2.4%
Total	100%

8.1.2 Buying tickets

One respondent complained of “tariff confusion” when travelling in Germany. “Rates were opaque. There were too many special fares that were not actually available.” A UK traveller to Italy said: “The journey was fine, but the information given at stations was nonexistent. I ended up at my destination more by chance than anything.” One UK respondent planning a train journey in Denmark said: “I actually had to book the tickets through my cousin who is Danish due to lack of on line information and telephone response”.

A UK woman explained some of the difficulties when travelling by train in the Netherlands. “My main issue was the difficulty in buying tickets. Some booking desks did not open until maybe 8am - no good for an early train; and were not open late. We tried to use ticket machines at the station but these only accepted Dutch bank cards, so could not use them. We did buy a travel card, but then had problems topping it up (we could not use machines as we did not have a Dutch bank card, so had to use cash). If you have to buy tickets from an office (not from a machine) you pay a surcharge of 50 cents per tickets - so a standard fare of €3 becomes €3.50. It just seems designed to work for the Dutch and to take more money from tourists and non-nationals. Many of the Dutch railway staff were embarrassed at the situation, particularly the difference between the use and acceptance of debit/credit cards in Amsterdam and in all other cities.”

Fig 21: Train travel – method of booking

Q. What method did you use to book your train travel?	Base: 205
Internet (email/ website)	46.8%
In person	35.1%
By telephone	10.2%
Other, please specify:	7.3%
App (mobile/tablet)	0.5%
Total	100%

8.2 Problems experienced

Our respondents had experienced problems with delays and cancellations, poor standard of the train and poor customer service. Lack of information was also a problem and information that was provided was often reported to be unclear.

8.2.1 Delays and cancellations

More than half of respondents that experienced a problem with train travel said that delays were to blame. One retired man travelling through France missed his Eurostar connection when "the TGV broke down for 1 hour 40 minutes". People seemed to accept that delays and cancellations would occur, but it was how the train company dealt with them that was important. For many of our respondents it was a lack of information, or unclear information, which seemed to make the experience of delays worse. Clear information about what is causing the delay, and how long it can be expected to last, can make a delay more bearable. Timely information about alternative travel options can reduce waiting times and help people to reach their destinations as quickly as possible. However, according to our respondents, this was not always the case.

8.2.2 Information

Lack of information was a reason for dissatisfaction for 17.6% of train travellers, and 16.7% said that information provided was unclear. An elderly man, travelling from Berlin to London, via Brussels, said that there was "a total lack of communication" when his train was delayed. "The Berlin - Cologne train was late as was the connecting train to Brussels. The on-board 'person in charge' just gave up and when the train reached Belgium he simply sat on the train step smoking, saying 'make your way to Brussels'. The D.B. train, having aborted the run to Brussels, returned to Germany leaving a whole train full of people stranded. We were able to make it to Brussels (with difficulty) but missed the Eurostar connection." He said: "if clearer information had been provided much distress could have been avoided."

An elderly man travelling by train in the Netherlands said: "The railway website said to check within 10 days of travel for any changes. I checked on the Wednesday before travel on the Saturday, when there was supposed to be a through train from Rotterdam Centraal to Leeuwarden, with no changes. We had to change twice and at the second change there was no indication on the platform that one had to be in a particular part of the train. We got in the wrong part and so had to get out and change to the correct part at the station where the train split. The basic problem was lack of information. It was not a language problem and many Dutch people had the same problem (but, being more familiar with their railway company were not at all surprised!)."

The language barrier seemed to cause problems for many as announcements and signage was often only in the home country's language and staff did not speak other languages to allow them to communicate with tourists.

A UK passenger travelling from Schiphol to Amsterdam in the Netherlands Central said: "A number of ticket machines were inoperative. The information given on the platform displays was unclear. Direct train to Amsterdam Central was delayed considerably and no information was given whether any 'through

trains' stopped at Amsterdam Central and whether we could have boarded one of them".

A Danish woman travelling in France told us: "We could not see timetables for individual trains. If we'd had access to these we could, for instance, have made it to our destination quicker with a train that left seven minutes later than ours."

8.2.3 Poor standard of train

A quarter of train travellers (24%) complained about the standard of the train that they had been on. A traveller in Germany complained about the state of the train she was on: "It was a warm day - the air conditioning failed and the bistro was closed so there were no drinks available. There was rubbish and crumbs in the compartment even before the train had left the first station. The toilet became increasingly messy during the journey."

An unlucky UK couple travelling in Italy were left soaking wet when "faulty air conditioning sprayed water over us and our luggage for 20 minutes". Another Eurostar traveller said: "We travelled on Euro tunnel at peak period, therefore very busy. On returning home to UK it quickly became apparent that only two toilets were working on the whole train. Most people spent the entire journey looking for the toilets that worked and then queuing to use them. Not good enough!"

8.2.4 Lack of seats/not as described

Another issue mentioned quite frequently by our respondents was not getting a seat – either because the train was too crowded or because there had been a mix up with their booking. An elderly man travelling in Italy complained: "We paid for first class tickets, but the train had no first class coaches!"

One UK passenger travelling from Switzerland said: "The person directing passengers on to the train in Zürich was both rude and unhelpful to all of us who had booked seats, only to find that a single deck train had been provided instead of a double decker. We were told to find a seat anywhere because there was plenty of room but we would have to move if somebody else claimed it. In fact, the train was overfull (and it was not easy to move with ski gear and luggage) and we had to stand for five hours. I wrote to TGV with copies of my booking and tickets but never had the courtesy of a reply. I don't think it is good enough to expect people to stand for that long especially when seats had been reserved."

Other reasons given for dissatisfaction were: overcrowding, lack of luggage space, doors not opening at stations. However, some complaints mentioned in the open comments were out of the control of the service provider. For example, extreme weather disrupting services, pickpockets and security alerts.

Fig 22: Train travel - nature of problem

Q. What was the main reason(s) you were dissatisfied with your train travel?	Base: 204
Train delayed	52.9%
Poor standard of train (e.g. cleanliness, state of repair)	24%
Poor customer service	20.1%
Lack of information	17.6%
Train cancelled	17.6%
Information given was unclear	16.7%
Poor choice/unable to book exactly what I wanted	11.3%
Special requests not provided (e.g. specific seat or carriage)	10.3%
Train service not as described	9.8%
Additional charges that I was not expecting	7.8%
Dispute over cancellation/ refund	4.4%
Poor standard of food	3.4%
Total cost different to that agreed	2%
No record of my booking when I arrived	1%

8.3 Disabled travellers

Our respondents with disabilities had different experiences of some aspects of train travel. A fifth (20%) of respondents with a disability told us that the main reason for their dissatisfaction was not having special requests met, whereas this problem was only experienced by 9.8% of travellers without disabilities. Disabled travellers also seemed more likely to experience unexpected additional charges – a fifth of disabled travellers cited this as their main reason for dissatisfaction compared to 7.7% of travellers without disabilities.

Interestingly, as with accommodation, disabled respondents were less likely to receive poor service – only 13.3% cited this as a main reason for dissatisfaction compared to 21.2% of respondents without a disability.

8.4 Complaints

Over a third (37.7%) of respondents who had experienced a problem with their train travel complained to the service provider. This is very low in relation to other services – where around two thirds to three quarters of people reported making a complaint to the service provider. In many cases people reported that there was no obvious person to complain to – or that they would have to queue up at ticket office to speak to staff. Some also said that they felt the problem was too small to complain about or was not the fault of the train operator – for example, poor weather conditions or broken signals.

8.4.1 Difficulty knowing how to complain

The low number of people making a complaint could be due to confusion about how to claim compensation or who to complain to. A female traveller from Denmark wanted to complain about her train service to Amsterdam but says “it was unclear to me who was responsible for the service because the City Nightline runs with carriages from so many different countries”. Another passenger in the Netherlands wanted to complain but said: “It was already 10pm and there seemed a dearth of staff around to deal with any complaints plus the platform was seriously overcrowded.”

One UK respondent told us of their delayed train journey in France: “It wasn't clear how I could claim a partial refund on the price of tickets..... the employee of the train company was not equipped with the necessary paperwork or able to speak to anyone other than French language speakers.” A German traveller said there was “conflicting information and cumbersome procedures involving reimbursement”.

8.4.2 Lack of response

When people did work out how to complain, many reported that companies failed to respond. One UK traveller in Switzerland booked a train ticket with an allocated seat but the train was overcrowded leaving her standing for a five hour journey. “Rail Europe told us to complain to TGV (SNCF) with copies of tickets and bookings and to send it special delivery. We did but have not heard a word. That was five months ago.”

Satisfaction with complaints to train service providers was exceptionally low, compared to other services in our survey. Only 26.1% of those that complained to the service provider were satisfied with the outcome of their complaint. More than half (52.2%) were not at all satisfied and 13% were only slightly satisfied.

Of those that did not complain to the service provider, 31.5% said that they didn't think their complaint would be successful, 26% said that it seemed too difficult/ complicated and 23.6% said that they did not know who to complain to – the comments received from respondents backed this up.

9. PLANE TRAVEL

9.1 Booking

The majority of people (56.1%) booked directly with the airline. The most popular way to book was via the internet. Almost eight out of ten booked tickets online (79.5%).

Fig 23: Plane travel – organisation booked with

Q. How did you book your plane travel?	Base: 426
Directly with the airline	56.1%
Travel agent	23.7%
Price comparison website (one site that compares prices from multiple companies)	11.3%
Other	8.9%
Total	100%

Fig 24: Plane travel – method of booking

Q. What method did you use to book your plane travel?	Base: 425
Internet (email/ website)	79.5%
By telephone	8.2%
In person	7.3%
Other, please specify:	3.8%
App (mobile/tablet)	0.7%
By post	0.5%
Total	100%

9.2 Problems experienced

The most common problem experienced by respondents was flight delays. Long queues at check-in and poor customer service were the second and third main reasons for complaint.

Fig 25: Plane travel – nature of problem

Q. What was the main reason(s) you were dissatisfied with your plane travel?	Base: 423
Flight delayed	45.9%
Long queues at check in	24.1%
Poor customer service	23.2%
Flight cancelled	11.1%
Luggage lost or delayed	9%
Information given was unclear	8.7%
Poor standard of plane (e.g. cleanliness, state of repair)	8.5%
Poor standard of food	8.3%
Lack of information	7.8%
Additional charges that I was not expecting	7.3%
Dispute over cancellation/ refund	6.9%
Poor choice/ unable to book exactly what I wanted	6.4%
Plane service not as described	5.9%
Special requests not provided (e.g. specific seat or disabled access)	5.4%
Luggage damaged	3.8%
Total cost different to that agreed	1.7%
No record of my booking when I arrived	1.2%

9.2.1 Budget airlines lowering expectations

The feedback from respondents suggests that low cost airlines were a contributing factor to many people's negative experiences. Many complained about lack of allocated seating, excess charges for baggage and checking in,

overcrowded planes, cramped conditions and poor customer service. One respondent summed up the views of many by saying: "Budget airline = cattle class. I suppose you get what you pay for."

This feedback indicates that the rise of low cost airlines in Europe has led to consumers' expectations being lowered. However, consumers still have a right to expect a minimum level of standards and the same consumer rights apply, regardless of the price paid for the service.

9.2.2 Delays and lack of compensation

Almost half (45.9%) of plane travellers with a negative experience said that this was due to delays. In many cases it was not the length of the delay that caused dissatisfaction (which, in some cases, people understood was unavoidable) but how the airline dealt with customers when a delay occurred e.g. by giving information, providing refreshments and alternative flights or accommodation. There were also complaints about difficulty in obtaining compensation for delays.

A UK traveller to Cyprus said: "We were delayed for seven hours due to a mechanical problem. We were given a voucher for £3.50 for this time, which didn't even cover a cup of tea and a sandwich, never mind a meal. On our return, we requested compensation from the airline, as is our legal right, but we have yet to receive anything other than a couple of responses saying they are 'looking into it'. This happened last October, nearly ten months ago."

A passenger flying from Ireland back to the UK said: "My flight was cancelled on the return leg of trip. Queue for rebooking was about two hours long, I was told by the Aer Lingus rep that I didn't need to queue as I could rebook online. However, after I'd dropped my place in the queue to go online on my laptop, I found it was not possible after all since I had already been checked in. I ended up queuing for three hours instead, and no-one could give us info. They tried to rebook us on another flight from an alternative airport two hours away by bus, we refused and took their offer of hotel for the night. Glad we did, we heard later that the alternative flight had been cancelled also..... Disgusting, I won't be flying Aer Lingus again." His attempt to complain was unsuccessful. He tells us: "My complaint was completely ignored. I shall be voting with my feet."

A UK traveller returning from Norway told us: "My flight was cancelled at short notice resulting in additional costs of one night hotel and severe hassle trying to rebook flight. When I tried to complain I was just fobbed off." Another passenger flying into the UK complained about lack of information given when delayed: "I experienced a delay of over an hour for a two hour journey and was not updated at all within that time as to what was happening, or even notified of a delay. Everyone waiting to fly was given no indication of a delay or given an updated time we would be boarding the plane. The screens remained the same with the times on them even when it was an hour past the scheduled flight time."

One German respondent said "I was on a flight from Lisbon to Frankfurt and the aircraft had to return to Lisbon because of technical problems over France. We had to wait there for hours, with no information, no drinks and no arrival time for Frankfurt." A female traveller from Slovenia told us: "We missed our flight because of floods in Germany. But they wouldn't declare it force majeure and we had to look for alternative one-way flight ourselves and also pay for it."

9.2.3 Lost luggage

Delayed or lost luggage was an issue for 9% of respondents. One Slovenian respondent told us: "At the check-in counter, my suitcase was directed to Brussels without a sticker, whereas I was flying to Lisbon." One Greek passenger told us: "My suitcase was broken twice on an easyJet flight and although I applied for compensation they never called me back."

A female senior citizen from Denmark arrived back home to discover her luggage was missing. "The staff spent more than four hours looking for two suitcases and they called it 'force majeure'!" Another Danish citizen, travelling to Turkey with his family, had problems with delayed luggage. "We checked the bags in 1.5 hours ahead of departure in an empty airport. Four bags arrived with us but the last bag got left in the departing airport. The bag didn't show up for 36 hours."

A German respondent complained about the difficulties of reporting lost luggage: "My case was lost. The procedures to get it back were very complex and completely inadequate. The airline demanded original receipts for everyday items that had been in my luggage, which was totally unrealistic."

9.2.4 Poor customer service

Almost a quarter (23.2%) of plane travellers said that poor customer service was the main reason for their dissatisfaction. One UK traveller to Germany said: "I never had the feeling I was a customer, just a package waiting to be loaded". One Greek woman complained about the lack of customer service when she had problems making a connecting flight: "We arrived late due to a technical problem at a German airport from where we had a connecting flight to Athens. Staff on the plane, and throughout the airport, told us that our flight would wait for us and to run to the exit to catch it. But the aeroplane staff did not bother to inform the check-in counter. So we ran there only to be told that the flight had already departed. We returned to the ticket booth where we had to wait in long lines to see what could be done for us.They told us we would depart the next day, we complained firmly and finally departed for Athens three hours later."

Another Greek man complained: "I was on a flight that had to land back in the departure airport due to bad weather. We were offered nothing when waiting.

We had to buy everything and because the plane was not re-stocked there was not enough food and water for everyone once we took off again.”

One UK respondent said: “In over 50 years of constant international travel I find Manchester International airport one of the worst in the world for customer treatment. Travellers are treated worse than sheep in an abattoir.”

9.2.5 Additional charges

It appears to be coming a more common practice to advertise flights at a low price, then to charge for lots of extras ‘bumping up’ the total price. Many people complained about this lack of transparency.

An elderly man flying from the UK to France complained: “There ought to be a statutory breakdown of total air fare which all providers should have to adhere to. Additional fees/charges suddenly appear at the final stage of booking and there is no standard breakdown. Ryanair is particularly at fault; also, there are possible further charges hidden in the fine print of ‘terms and conditions’. What is advertised at £45 ends up as £175.”

A UK traveller to Norway complained: “KLM charged us an additional fee on each flight for having a single suitcase each to put in the hold”. One Greek respondent complained: “The airline website was not working properly in order for me to buy extra kilos for my luggage. As a result I was asked to pay a huge amount of money when I was charged at the airport.”

9.3 Disabled travellers

The main difference in the experiences of disabled travellers was not having their specific requests met – 14.3% of disabled travellers cited this as their main reason for dissatisfaction, compared to only 4.5% of passengers without disabilities.

A higher proportion of disabled respondents also felt that they had received poor customer service – 42.9% cited this as one of their main reasons for dissatisfaction, compared to only 22.2% of passengers without disabilities.

One disabled passenger travelling to Spain was told that he could not board the aeroplane with his walking stick as it was against regulations. He said: “My wife had to push me in my wheelchair to boarding control where a dispute arose over my essential walking stick. The individual at security was adamant that I could not board with it. My wife had to return to the check-in desk to place my stick into booked luggage.” He told us: “I was told that if I continued to complain I would be refused boarding. I have never, in all my travel experiences, met such regulation being so improperly interpreted”. There was no problem on the return flight and security allowed him to take the walking stick onto the plane.

9.4 Complaints

Just over half (51.3%) of respondents that experienced a problem made a complaint to the service provider. On the whole, people were not satisfied with the outcome of their complaints to service providers. 64.1% were not at all satisfied and 14.1% were slightly satisfied. Only 11.5% were satisfied with the outcome of their complaint to the service provider.

9.4.1 Lack of response

For many of those that complained, the main problem was that they had not received a response to their complaint at all. A woman from the UK, holidaying in Spain, spoke of her unsuccessful complaint to easyJet following a delay: "Our flight was cancelled due to French Air Traffic Controllers strike. We arrived at Barcelona airport for an easyJet flight at 1pm. My husband is 80 and I am 68. We stood until 8pm, not having anything to eat or drink. At 8pm we had still not eaten or been given a hotel, so we returned to our hotel in Barcelona where they gave us a room, together with the cost of the airport bus. We contacted easyJet to ask for reimbursement in June 2013. We are still awaiting a reply. We sent two further letters and an email but we have not even received an acknowledgement." Another traveller to Spain is still waiting for a response to her complaint about an eight hour delay. "We have put in a claim for delay but have heard nothing yet despite this happening in October 2012."

9.4.2 Difficulty complaining

The most common reason for not complaining (42.7%) was that people did not think their complaint would be successful. One UK respondent told us: "I was told if I continued to complain I would be refused boarding". One traveller said that they hadn't complained because: "I was under the impression that I had to complain at the airport in order for my complaint to be acted upon. The problem was there was no one available at either airport."

9.4.3 Low expectations

Several people felt that this was just what you should expect from a cheap airline, so didn't bother making a complaint. Many said that, instead of complaining, they just wouldn't use that airline again. "I couldn't be bothered and just decided never to use a cheap airline again", said one passenger from the UK.

9.4.4 Further complaints

Five per cent complained to a trade association, 3.3% to independent complaint resolution. 42.1% to family and friends and 14.9% wrote a negative review on the internet. 4.1% took the matter to court, which is a much higher proportion than other services in our survey.

10. BOAT TRAVEL

10.1 Booking

The majority of people booked their boat travel directly with the service provider. It is not the kind of service often found on price comparison sites.

Fig 26: Boat travel – organisation booked with

Q. How did you book your boat travel?	Base: 110
Directly with the boat company	55.5%
Travel agent	27.3%
Other	13.6%
Tourist office	2.7%
Price comparison website	0.9%

Fig 27: Boat travel – method of booking

Q. What method did you use to book your boat travel?	Base:110
Internet (email/website)	54.5%
By telephone	21.8%
In person	18.2%
Other	2.7%
By post	1.8%
App (mobile/tablet)	0.9%

10.2 Problems experienced

Poor customer service was the main reason for dissatisfaction among respondents. A fifth of people who'd experienced a problem with a boat trip said that customer service wasn't up to scratch. Another fifth reported problems with delayed departures and 16.7% were not happy with the quality of the boat.

10.2.1 *Changes to the itinerary*

A common problem for boat passengers appeared to be changes to their itinerary, often due to bad weather or flooding. Although people understood that this was outside of the company's control several felt that clearer information should have been provided, giving them the opportunity to cancel and minimise inconvenience. Itinerary changes involved elements of poor customer service (which 21.3% were unhappy with), service not as described (13%) and lack of information (11.1%).

A male traveller from the UK went on a river cruise in Austria but was not told until he arrived that the Danube was closed to river traffic due to a damaged lock, caused by very bad flooding. He told us: "Information beforehand could have given us a chance to cancel as holiday not as described." A female traveller on a river trip in France had a similar experience. "Our river trip down the Saone/Rhone did not take place at all because the water level was too high for the boat to get under the bridges. We had to be taken by coach each day to sites to be visited, leaving little to no leisure time. I would have preferred to be given the option to cancel and rebook at another time."

A male passenger on a cruise in Hungary suffered a similar fate: "Despite asking Viking via email and telephone what effect the floods were going to have, we were told they were only minor. When we arrived in Budapest, we found the ship was in Slovakia and could not move. In the end we were transferred between three ships in succession and spent most of the 'cruise' travelling around by coach. If we had been given the correct advance information when we requested it we would have cancelled. Viking is refusing compensation, other than offsetting a future cruise by 50% of what the failed cruise cost. It is clear from Viking's Booking Conditions that they did not abide by their own requirements relating to 'Significant Changes', which included the option to cancel with a full refund, which we were not offered."

10.2.2 *Delays*

A fifth of boat passenger who'd experienced problems said that this was due to delays. A female traveller from the UK experienced a 14 hour delay when travelling by ferry from Greece to Italy. It was only when we arrived to check in that we were told departure had been rescheduled for 14 hours later. This meant

we incurred costs relating to the delay and had to rebook onward travel also at extra cost.”

Fig 28: Boat travel – nature of problem

Q. What was the main reason(s) you were dissatisfied with your boat travel?	Base: 108
Poor customer service	21.3%
Departure delayed	19.4%
Poor standard of boat (e.g. cleanliness, state of repair)	16.7%
Poor standard of food	13.9%
Service not as described	13%
Information given was unclear	11.1%
Special requests not provided (e.g. specific cabin or disabled access)	9.3%
Departure cancelled	8.3%
Additional charges that I was not expecting	8.3%
Lack of information	7.4%
Concerns about safety of boat	6.5%
Poor choice/ unable to book exactly what I wanted	5.6%
Dispute over cancellation/ refund	2.8%
Total cost different to that agreed	2.8%
No record of my booking when I arrived	1.9%

10.2.3 Poor standard of boat

For 16.7% of travellers, the standard of the boat was their main cause for dissatisfaction. A UK traveller on a boat in the Netherlands said: “the cabin was filthy....we complained that our cabin had not been cleaned and it was cleaned immediately. However, the same problem occurred on the return journey.”

A female passenger travelling by ferry between the UK and France told us: “the Dover boat was dreadful - not clean and very shabby and no food to speak on being sold. The Portsmouth boat was fine but the catering was abysmal. We shall not use them again.”

10.2.4 Illness

A significant number of comments about problems were related to illness. This is not necessarily something that service providers can control, but how they deal with issues is very important to passengers, according to our survey. A number of respondents reported serious illnesses (Norovirus) on board, and many of those were dissatisfied with the way that the company handled the problem.

One UK traveller in Spain was very unhappy about the way that he and his fellow passengers were treated when the Norovirus struck their boat. "Over 1000 passengers suffered Norovirus and the ship was disembarked at 8am. Many people were still unwell, but all were dumped on the quayside to collect their baggage and stand in line to await a coach to the airport. On arrival at the airport, all the passengers were herded into the check in desks, still dragging luggage, despite their weaknesses. I did complain but the company dismissed it saying that they were not responsible for the virus or its transmission. They said they would look into my comments regarding disembarkation, but I have had no further contact. My claim for recompense was dismissed."

10.3 Disabled travellers

Similar to other travel services, boat passengers with disabilities were more likely to have difficulty getting their needs met. 'Poor choice/unable to get what I wanted' was a main reason for dissatisfaction for 14.3% of disabled travellers, compared to 4% of passengers without disabilities. 'Specific requests not met' was cited by 28.6% of disabled travellers, compared to only 8% of those without disabilities.

10.4 Complaints

Six out of ten (60.7%) respondents with a problem complained to the service provider. Of those that complained, only 10% were satisfied with the outcome if their complaint. Two thirds (65%) were not at all satisfied and 15% were only slightly satisfied.

Half of those that didn't complain said it was because they thought their complaint wouldn't be successful. A further 23.8% were put off complaining because they thought that the service provider wouldn't respond well and 11.9% said that they did not know who to complain to.

More than half of those that experienced a problem (51.7%) complained to family and friends, a fifth (20.7%) left internet feedback and 3.4% took the matter to court.

11.PACKAGE HOLIDAYS

11.1 Booking

Just over half of bookings (51.6%) were made directly with the tour operator. Almost half (44.5%) were made through an intermediary – either a travel agent or a comparison site. The internet was the most common way to make bookings.

Fig 29: Package holiday – organisation booked with

Q. How did you book your package holiday?	Base: 225
Directly with the tour operator	51.6%
Travel agent	34.7%
Price comparison website	9.8%
Other	4%

Fig 30: Package holiday – method of booking

Q. What method did you use to book your package holiday?	Base:224
Internet	51.3%
In person	24.6%
By telephone	21.9%
Other	1.3%
By post	0.9%

11.2 Problems experienced

11.2.1 *Poor standard of accommodation*

The top reason for dissatisfaction with package holidays was the standard of accommodation. A German traveller to Spain complained that his accommodation was of a poor standard. "The hotel was advertised as a four star. But when we arrived, the rooms had damaged floors, the furniture was badly worn, tiles in the bathroom were damaged – the whole hotel was in desperate need of complete renovation." Another German traveller to Spain

complained that their apartment was “dirty and worn.” A UK traveller to Cyprus complained that his room was “unclean and smelly” and another visitor to Malta reported: “Our room had a leaking air conditioning unit which soaked the floor and the clothes in the wardrobe.”

Fig 31: Package holiday – nature of problem

Q. What was the main reason(s) you were dissatisfied with your package travel?	Base: 220
Poor standard of accommodation	26.4%
Poor customer service from tour operator	24.5%
Flight delayed	22.3%
Holiday not as described	20.9%
Poor quality of food at accommodation	20%
Information given was unclear	18.6%
Lack of information	16.4%
Problems with transfer between airport and accommodation	16.4%
Given a different size/type of room to that booked	13.2%
Additional charges that I was not expecting	12.7%
Poor standard of plane (e.g. cleanliness, state of repair)	10.5%
Sent to a different hotel to that booked	10.5%
Poor choice/ unable to book exactly what I wanted	9.5%
Luggage lost or delayed	9.5%
Special requests not provided (e.g. disabled access)	9.5%
Special requests concerning the room not provided	9.5%
Dispute over cancellation/ refund	8.6%
Luggage damaged	7.3%
No record of my booking when I arrived	6.4%
Flight cancelled	5%
Total cost different to that agreed	4.5%

11.2.2 Flights delayed

Delayed flights were the third most common problem quoted by our respondents. As with our section on plane travel, people seemed to accept that delays would occur but placed a lot of importance on how the tour operator dealt with the delay and any subsequent claims for compensation. A passenger returning from a holiday in Spain said: "There was just under 11 hours delay on our return flight with Monarch, arriving at Gatwick at 2am, and we were only given one €15 voucher".

One male traveller from Germany said: "The return flight from Spain to Germany was delayed by several hours. I have made a compensation claim with the airline, but have heard nothing in almost three months."

11.2.3 Holiday not described

A fifth of respondents said that their main cause for dissatisfaction was the holiday not being as described. A holidaymaker in Italy told us: "The hotel we went to has been given a four star rating by the tour operator. In our view it would be lucky to get a two star rating." A male traveller to Spain said: "When booking the holiday we were informed that air-conditioning would be available. Our room did not have an air-conditioning facility just two old fans."

11.2.3.1 Different accommodation

A surprisingly high number of travellers (13.2%) were given a different size/type of room to the one they had booked. One male respondent from Slovenia said: "When we got there, we weren't given the room we had booked; as we didn't want the replacement room of lower quality we spent the first night in the hotel reception. All of the guests who got there that night were put in rooms of lower quality. After some arguing, about 14 people were put into the right rooms, while eight of us, i.e. to fit into four rooms, stayed at the reception."

Other unhappy travellers had been sent to a completely different hotel to the one they had booked. A male traveller from Denmark was not happy when he was put in a different hotel to the one he had booked. He told us: "I had booked a quiet hotel, but this was fully booked so the travel agency gave us another hotel which was definitely not quiet. There was a lot of noise, drinking and loud music going on." A UK respondent who'd travelled to Cyprus said: "We were temporarily relocated to a different hotel than the one booked and on returning did not get the rooms we had requested. The hotel did offer us various extras to compensate for the inconvenience but the experience spoilt part of our holiday."

11.3 Disabled travellers

Disabled travellers in our survey seemed less likely to be able to find a holiday that suited their needs. Just over a fifth (21.1%) said that one of the main

reasons for their dissatisfaction was 'poor choice/being unable to book exactly what I wanted', compared to only 8.8% of travellers without disabilities.

11.4 Complaints

Almost two thirds (63.2%) of people that experienced a problem with their package holiday made a complaint directly to the service provider. Of those, 9% told us that they were satisfied with the outcome of their complaint. Half were not at all satisfied and 27.3% were only slightly satisfied.

Of those that didn't complain 48.1% held back because they thought that their complaint would not be successful. A female holiday-maker from Germany booked a package holiday but 2-3 weeks before departure was informed that the flight times had changed by 10 hours and that the route had been changed. "This caused complete change of travel planning. Our complaint had no success. We spent several hours with no result. Finally we were offered €70 discount, i.e. € 35 per person."

A Danish woman, on holiday in France, experienced poor service at her hotel and was unhappy with the outcome of her complaint. "All staff were new on the site and had not received training. This was particularly bad at mealtimes where everything was chaos - table location, serving, etc. We complained to staff on site with no results. On our return we sent three emails to the company and only got a response the third time. The company said there would be a 4-6 week wait for them to handle the complaint. Eventually they gave us a 500dkr voucher to use on another trip with them. This might just be wasted money for us, because we don't feel like travelling with this company again after this experience."

12. OTHER SERVICES USED

At the end of the survey, we asked people if they had used any of the following cross border services during the last 12 months:

Fig 32: Other cross border services used in the last 12 months

Q.44 During the last 12 months have you bought or used any of the following services from a company based in a European country different to your home country?	Base: 5297
Postal services e.g. sent or received letter/ parcel from another European country	27.7%
Online shopping	24.9%
Financial services e.g. bank account, savings account, insurance	17.2%
Health services e.g. dentist, optician, doctor, surgeon	10.7%
Beauty services e.g. spa, cosmetic surgery	3.9%
Property services e.g. estate agent, letting agent, removal company	3.1%

These broadly correspond to areas that the ANEC Services Working Group covers and responses may prove useful for ongoing or future standards work. The most commonly used cross-border service is postal services (27.7%). The second most commonly used cross-border service was online shopping (24.9%).

It is interesting to note that cross-border financial services have been used by 17.2% of respondents during the last 12 months, as the potential for consumer detriment is relatively high in this area. Cross-border health services have been used by 10.7%. This is also an area of potentially high consumer detriment.

13.CONCLUSIONS

EU tourism statistics indicate that the trend for intra-European travel will continue to grow. It also states that tourism is key to the development of the EU. ANEC's survey highlights key areas in the tourism sector where consumers are dissatisfied and experiencing problems.

13.1 Key issues for consumers travelling in Europe

To improve the consumer experience of intra-European travel our research highlights several key issues that need to be addressed:

13.1.1 High incidence of problems with car rental

The evidence points to widespread problems in this area, with some key consumer issues that need addressing e.g. fuel policies, insurance, extra charges, deposits and automatic debits from credit cards. Consumers are clearly at a disadvantage when dealing with car rental agencies and experiencing high consumer detriment. Attempts at resolution often fail.

Recommendation: Car rental is an area that could benefit from tighter regulation and/or standardisation at a European level. We recommend that ANEC investigates this as an area of new work.

13.1.2 Lack of clear pre-contractual information

Accurate and comprehensive pre-contractual information is vital so that consumers can make informed purchasing decisions. The EU Directive on Unfair Commercial Practices contains legislation that covers pre-contractual information, stating that: "all the necessary information for the consumer must be provided to him/her in a clear and comprehensible manner at a suitable time to enable him/her to make a transactional decision."

It could be argued that many of the problems experienced by our respondents, particularly when renting cars, should be covered by this legislation. But it would appear that some businesses are not playing by the rules, and many consumers are not aware of their rights in this area, leading to high levels of consumer detriment.

Our results showed that many respondents were dissatisfied with their tourism/travel service because the service that they received, or the price that they paid, was different to that they had expected. In some cases this was due to a complete lack of information, in other cases the information that was given was unclear leading to confusion and misunderstandings. Discovering that you are not getting what you expected, often on the day of arrival, can lead to financial detriment, stress and inconvenience. This was most evident in car

rental with the high levels of confusion around charges and what was or was not included.

Recommendation: Service providers should follow strict guidance about the provision of pre-contractual information, such as a full and comprehensive list of charges, so that consumers can make informed decisions. Although legislation deals with some of these issues it is felt that a standard covering 'pre-contractual information' could give more detailed guidance to underpin existing legislation.

13.1.3 Language barriers making communication difficult

In many cases our respondents faced problems caused, or exacerbated, by the difficulty of understanding important information in a country's native language. This was particularly evident in the area of train travel where people were more likely to be purchasing tickets on the day of travel and were confused about timetables and ticketing.

Recommendation: That service providers offer consumers a choice of languages so that they are able to understand important information about the service being provided, for example, announcements about delays or cancellations, timetables, pricing, booking information and complaints information. These issues should be considered during the development of future standards, which cover services that are likely to be used cross-border.

13.1.4 Increased use of review sites

Our research shows that a large number of people who have experienced a problem share their story on online review sites. These actions do not help them to achieve redress or to resolve their particular problem. They do not feed concerns directly back to the service provider to effect change. However, 'spreading the word' to others might have a knock-on effect, where people are deterred from using a particular company or service after hearing about another persons' bad experience.

Evidence shows that online review sites are very influential in consumers' purchasing decisions so the way that they are set up and managed is very important. There is the potential for consumers and service providers to abuse the system with inaccurate or misleading information. As review sites are growing in importance, we feel that they would benefit from regulation or standardisation of some kind. The key issues are:

- Clear/ transparent information – about ownership of site, impartiality, what reviews are based on.
- Structure of reviews – is there any structure to the feedback template? Are consumers being asked relevant/useful questions?

- *Verification of reviews – processes in place to ensure that reviews are genuine*
- *Dealing with complaints/abuse.*

***Recommendation:** There is a need for European regulation, or standardisation, of consumer review sites. ISO recently proposed an international standard on review sites. Our recommendation is that ANEC should support this and be closely involved in its development to ensure that key consumer issues (above) are taken into account.*

13.1.5 Confusion around liability

With an increasing number of travel services being booked on the internet, as well as through traditional agents, it can be difficult for consumers to know who is responsible for putting things right. The revised Package Travel Directive proposes to address this, making it clearer to consumers who is responsible for resolving complaints if they have booked through a third party. However, just having the Directive in place is only the first step. To practically make a difference, this information will need to be clearly communicated to consumers.

***Recommendation:** ANEC to keep a watching brief on the content of the revised Package Travel Directive and ensure that changes regarding liability are clearly communicated to consumers. Relevant sections of this Directive should be referenced in any future European standards regarding travel services.*

13.1.6 Low awareness of consumer rights

Our research shows that consumers do not have a full understanding of their rights. One in ten (10.5%) of our survey respondents experiencing problems told us that they did not make a complaint because they didn't know their rights. With a broader population sample (not consisting of members/supporters of consumer organisations) rates of awareness could be even lower.

Low awareness of consumer rights was also demonstrated in respondent's reluctance to pursue complaints. If consumers do not know what to expect from a service provider, or do not know what is or is not acceptable, they will not feel confident about proceeding with a complaint. This is proven by our findings, where the most common reason for not complaining was a fear that the complaint would not be successful (41.2%). Knowledge is power and if consumers know their rights they will be more confident about enforcing them and speaking out if things go wrong.

***Recommendation:** Our research points to a clear need to raise awareness about consumer rights in the area of travel and tourism. Only when consumers know and understand their rights will they be able to enforce them and seek effective redress.*

13.1.7 Low satisfaction with complaints handling

Our research shows that people who have experienced a problem are most likely to make a complaint directly to the service provider, but satisfaction with the outcome of complaints is low. A huge 53.9% of respondents who had complained to the service provider about a problem were 'not at all satisfied'.

Recommendations: Consumers are not satisfied with the way that all service providers deal with complaints effectively or to the satisfaction of consumers. This could be addressed by raising awareness to businesses of the benefits of good complaint resolution and promoting the existence of 'ISO 10002: 2004 - Customer Satisfaction: Complaints Handling' to increase take-up. ANEC should continue to monitor this area and support future initiatives that might benefit consumers.

13.1.8 Enforcement of consumer legislation

In many areas of travel and tourism regulations do exist to protect consumers, but our research suggests that people are not benefitting from existing regulation as the responsibility lies with the consumer to enforce rights that they don't know exist.

It is clear from reading details of people's experiences that many of the reasons for dissatisfaction were things that should be covered by EU regulation e.g. flight delays, unexpected charges and unclear information. However, in many cases people were simply not aware of their rights (detailed above in 13.1.6), but even when they did understand that they were entitled to compensation many experienced difficulty in seeking the redress that they were legally entitled to. This suggests that businesses might benefit from further education about the law, and potential consequences for breaking that law. Are the deterrents for breaking the law strong enough?

13.1.9 Consumers unsure how to escalate complaints

A key problem appears to be failure to progress complaints to the level necessary to achieve resolution detailed in existing legislation. Most of our respondents appeared to give up if the service provider failed to respond, or did not resolve their complaint satisfactorily.

Satisfaction with the outcome of complaints to service providers was very low, yet only a fraction of respondents who had experienced problems furthered their complaint by taking it to the ECC, ombudsmen or relevant trade association. This could be a result of low awareness of the existence of these avenues of complaint, or difficulty of understanding complaint procedures or lack of confidence in their ability to resolve complaints.

Recommendations: To raise awareness about how to escalate complaints and which organisations can deal with complaints. To raise awareness of the ECC as a first port of call to give advice on how to escalate complaints and achieve effective redress..

13.1.10 Lack of official data on travel complaints

Official European complaints data (e.g. from the ECC) does not give an indication of what proportion of people are experiencing problems. It can only report on actual numbers making a complaint. As illustrated in Section 5 of this report very few of our respondents experiencing problems made an official complaint to anyone other than the service provider. This suggests that awareness of the ECC is low and that official ECC data captures only a fraction of the total problems experienced by consumers.

Robust complaints data would help to inform EU policy and increased awareness of the ECC advice service would help European consumers to understand and enforce their rights, getting the resolutions that they are entitled to.

To ensure that consumers are protected in this area, and that intra-European tourism can flourish, the way that the EU collects information about complaints, and offers support and advice to consumers, needs to be improved.

Recommendations: Improve access to advice and complaints systems by:

- *Raising awareness of the ECC so that people know that there is a one stop shop for seeking advice, and reporting complaints about cross border issues.*
- *Improving the system of data collection by the ECC-Net so that more detailed information about complaints can be recorded. This will give European organisations the details they need to identify relevant and important issues and focus future work.*
- *Increase budget for ECC to allow them to deal efficiently and effectively with increased complaints.*

13.2 Recommendations for future ANEC work

Based on the results of this study we suggest several areas that ANEC might focus on in the future:

- price comparison sites
- consumer review sites
- car rental

- information provision – clarity of pre-contractual information
- complaints handling
- awareness of consumer rights
- awareness of complaints procedures

When it comes to other cross-border services, our survey showed that two of the most commonly used services are online shopping and financial services. It is possible that future surveys could be carried out to examine consumer experiences in these areas.

14.ANNEXES

14.1 ANNEX 1 – Partner organisations

Country	Consumer organisation	Website	Method of promotion
Cyprus	Cyprus Consumers' Association (CCA)	www.cyprusconsumers.org.cy	Magazine, website, facebook, monthly email newsletter, email to other orgs in Cyprus
Czech Republic	Czech Association of Consumers TEST	www.dtest.cz/	Website, email panel and newsletter
Denmark	Taenk/Forbrugerradet (Danish Consumer Council)	www.taenk.dk/	Email newsletter – 39,000 recipients
Germany	Stiftung Warentest	www.test.de/	Email newsletter
Greece	NEW INKA	www.newinka.gr	On website
	EKPIZO	www.ekpizo.gr/	Email to members, website, plus newsletter and press release
Slovenia	Zveza Potrošnikov Slovenije	www.zps.si/	Newsletter , website, facebook and twitter promotion
United Kingdom	Which?	www.which.co.uk	Newsletter to Which? Connect – 45,000 recipients

14.2 ANNEX 2 – Final Questionnaire

CONSUMER EXPERIENCES OF TRAVEL AND TOURISM IN EUROPE

1. Which country do you live in?

- a) Cyprus
- b) Czech Republic
- c) Denmark
- d) Germany
- e) Greece
- f) Netherlands
- g) Slovenia
- h) UK
- i) Other, please specify...

2. During the last 12 months have you bought or used any of the following services in a European country other than the country you live in?

- a) Car rental
- b) Accommodation (e.g. hotel, B&B, villa, apartment, cottage)
- c) Train travel
- d) Plane travel
- e) Boat travel (e.g. ferry or cruise)
- f) Timeshare or discount holiday club (e.g. you paid to join a 'club' that gives you regular access to one or more holiday properties)
- g) Package holiday (e.g. you bought a holiday that included flight and accommodation)

3. Did you have any negative experiences or problems with your **[pipe in each service used: multi code]**?

- a) Car rental
- b) Accommodation
- c) Train travel
- d) Plane travel
- e) Boat travel
- f) Timeshare or discount holiday clubs
- g) Package holiday
- h) None of these **[CLOSE]**

CONTINUE TO MODULAR QUESTIONNAIRE - RESPONDENTS ROUTED TO MODULES A, B, C, D, E, F or G FOR EACH SERVICE SELECTED AT Q3 – RANDOMISE ORDER THAT SERVICES ARE PRESENTED?

MODULE A: CAR RENTAL

You previously mentioned you had a negative experience when renting a car in Europe; the following questions are about the problems you had.

If you had negative experiences on more than one occasion in the last 12 months just tell us about the time when you had the most problems.

4. Which country were you travelling in when you had problems with car rental?

If travelling in more than one country choose the country that you collected your car from.

- a) **[Drop down list - all European countries]**
- b) Other, please specify...

5. **How did you book your car rental? [Single code, randomise]**
- Directly with the car rental company
 - Travel agent
 - Airline
 - Price comparison website (one site that compares prices from multiple companies)
 - Other, please specify...
6. **What method did you use to book your car rental? [Single code, randomise]**
- Internet (email/ website)
 - App (mobile/tablet)
 - By telephone
 - By post
 - In person
 - Other, please specify...
7. **What was the main reason you were dissatisfied with your car rental? [Single code]**
You can let us know about any other reasons in the 2nd column [Multi code]

Booking:

- Poor choice/ unable to book exactly what I wanted
- Lack of information
- Information given was unclear

Using the service:

- No record of my booking when I arrived
- Given a different size/ type of car to the one I booked
- Special requests not provided (e.g. child car seat)
- Poor standard of car (e.g. cleanliness, state of repair)
- Poor customer service
- Service not as described

Price and payment:

- Dispute over cancellation/ refund
- Additional charges that I was not expecting (e.g. for refuelling or damage to car)
- Total cost different to that agreed
- Other, please specify...

8. **Is there anything else you would like to tell us about the problem you experienced with your car rental? [Open]**

MODULE B: ACCOMMODATION

You previously mentioned you had a negative experience with accommodation; the following questions are about the problems you had.

If you had negative experiences on more than one occasion in the last 12 months just tell us about the time when you had the most problems.

9. **Which country were you staying in when you had problems with your accommodation?**
- [Drop down list - all European countries]**
 - Other, please specify...
10. **How did you book your accommodation? [Single code, randomise]**
- Directly with the service provider

- b) Travel agent
- c) Tourist office
- d) Price comparison website (one site that compares prices from multiple companies)
- e) Other, please specify...

11. What method did you use to book your accommodation? [Single code, randomise]

- a) Internet (email/ website)
- b) App (mobile/tablet)
- c) By telephone
- d) By post
- e) In person
- f) Other, please specify...

12. What was the main reason you were dissatisfied with your accommodation? [Single code]

You can let us know about any other reasons in the 2nd column [Multi code]

Booking:

- a) Poor choice/ unable to book exactly what I wanted
- b) Lack of information
- c) Information given was unclear

Using the service:

- d) No record of my booking when I arrived
- e) Different size/ type of room to that booked
- f) Moved to a different accommodation
- g) Special requests not provided (e.g. adjoining rooms, disabled access, baby cot)
- h) Poor standard of accommodation (e.g. cleanliness, state of repair)
- i) Poor customer service
- j) Poor standard of food
- k) Accommodation not as described

Price and payment:

- l) Dispute over cancellation/ refund
- m) Additional charges I was not expecting (eg: telephone or mini bar)
- n) Total cost different to that agreed
- o) Other, please specify...

13. Is there anything else you would like to tell us about the problem you experienced with your accommodation? [Open]

MODULE C: TRAIN TRAVEL

You previously mentioned you had a negative experience travelling by train in Europe; the following questions are about the problems you had.

If you had negative experiences on more than one occasion in the last 12 months just tell us about the time when you had the most problems.

14. Which country were you travelling in when you had problems with a train service?

If you travelled in more than one country choose the country that you spent the most time in.

- a) [Drop down list - all European countries]**
- b) Other, please specify...

15. How did you book your train travel? [Single code, randomise]

- a) Directly with the train company

- b) Travel agent
- c) Price comparison website (one site that compares prices from multiple companies)
- d) Other, please specify...

16. What method did you use to book your train travel? [Single code, randomise]

- a) Internet (email/website)
- b) App (mobile/tablet)
- c) By telephone
- d) By post
- e) In person
- f) Other, please specify...

17. What was the main reason you were dissatisfied with your train travel? [Single code]

You can let us know about any other reasons in the 2nd column [Multi code]

Booking:

- a) Poor choice/ unable to book exactly what I wanted
- b) Lack of information
- c) Information given was unclear

Using the service:

- d) Train delayed
- e) Train cancelled
- f) No record of my booking when I arrived
- g) Train service not as described
- h) Special requests not provided (e.g. specific seat or carriage)
- i) Poor standard of train (e.g. cleanliness, state of repair)
- j) Poor customer service
- k) Poor standard of food

Price and payment:

- l) Dispute over cancellation/ refund
- m) Additional charges that I was not expecting
- n) Total cost different to that agreed
- o) Other, please specify...

18. Is there anything else you would like to tell us about the problem you experienced with your train journey? [Open]

MODULE D: PLANE TRAVEL

You previously mentioned you had a negative experience travelling by plane in Europe; the following questions are about the problems you had.

If you had negative experiences on more than one flight in the last 12 months just tell us about the time when you had the most problems.

19. Which country were you travelling to when you had problems with plane travel?

If you travelled to more than one country choose the final destination of your trip.

- a) [Drop down list - all European countries]**
- b) Other, please specify...

20. How did you book your plane travel? [Single code, randomise]

- a) Directly with the airline
- b) Travel agent

- c) Price comparison website (one site that compares prices from multiple companies)
- d) Other, please specify...

21. What method did you use to book your plane travel? [Single code, randomise]

- a) Internet (email/ website)
- b) App (mobile/tablet)
- c) By telephone
- d) By post
- e) In person
- f) Other, please specify...

22. What was the main reason you were dissatisfied with your plane travel? [Single code]

You can let us know about any other reasons in the 2nd column [Multi code]

Booking:

- a) Poor choice/ unable to book exactly what I wanted
- b) Lack of information
- c) Information given was unclear

Using the service:

- d) Long queues at check in
- e) No record of my booking when I arrived
- f) Flight delayed
- g) Flight cancelled
- h) Plane service not as described
- i) Special requests not provided (e.g. specific seat or disabled access)
- j) Poor standard of plane (e.g. cleanliness, state of repair)
- k) Poor standard of food provided
- l) Poor customer service
- m) Luggage lost or delayed
- n) Luggage damaged

Price and payment:

- o) Dispute over cancellation/ refund
- p) Additional charges that I was not expecting
- q) Total cost different to that agreed
- r) Other, please specify...

23. Is there anything else you would like to tell us about the problem you experienced with this plane journey? [Open]

MODULE E: BOAT TRAVEL (FERRY, CRUISE)

You previously mentioned you had a negative experience relating to a boat trip in Europe; the following questions are about the problems you had.

If you had negative experiences on more than one boat trip in the last 12 months just tell us about the time when you had the most problems.

24. Which country were you in when you had problems with your boat trip?

If your boat trip covered multiple destinations, and you can't pinpoint where the problem occurred, just tell us the country that you spent the most time in [Single code]

- a) [Tick boxes - all European countries]**
- b) Other, please specify...

25. How did you book your boat trip? [Single code, randomise]

- a) Directly with the boat company
- b) Travel agent
- c) Price comparison website (one site that compares prices from multiple companies)
- d) Other, please specify...

26. What method did you use to book your boat trip? [Single code, randomise]

- a) Internet (email/ website)
- b) App (mobile/tablet)
- c) By telephone
- d) By post
- e) In person
- f) Other, please specify...

27. What was the main reason you were dissatisfied with your boat trip? [Single code]

You can let us know about any other reasons in the 2nd column [Multi code]

Booking:

- a) Poor choice/ unable to book exactly what I wanted
- b) Lack of information
- c) Information given was unclear

Using the service:

- d) Departure delayed
- e) Departure cancelled
- f) No record of my booking when I arrived
- g) Service not as described (e.g. didn't visit all destinations)
- h) Special requests not provided (e.g. specific cabin or disabled access)
- i) Poor standard of boat (e.g. cleanliness, state of repair)
- j) Poor quality of food
- k) Concerns about safety of boat
- l) Poor customer service

Price and payment:

- m) Dispute over cancellation/ refund
- n) Additional charges that I was not expecting
- o) Total cost different to that agreed
- p) Other, please specify...

28. Is there anything else you would like to tell us about the problem you experienced with your boat trip? [Open]

MODULE F: TIMESHARE OR HOLIDAY CLUB

You previously mentioned you had a negative experience or problem relating to a timeshare or holiday club; the following questions are about the problems you had.

If you had negative experiences on more than one occasion in the last 12 months just tell us about the time when you had the most problems.

29. In which country did you experience the problem?

Depending on the nature of the problem, this might be the country where you were approached by the timeshare/ holiday club representative, or the country that the timeshare/ holiday club you visited was located.

- a) **[Drop down list - all European countries]**

b) Other, please specify...

30. How long have you had this timeshare/ been a member of this holiday club? [Single code, randomise]

- a) Less than 1 year
- b) 1-3 years
- c) 3-5 years
- d) More than 5 years

31. How did you first make contact with the company that you bought this time share/ holiday club from? [Single code, randomise]

- a) The company contacted me in my home country (e.g. sent me an email, letter)
- b) The company contacted me while I was abroad/ on holiday (e.g. came up to me in the street or in my hotel)
- c) I contacted the company myself
- d) I can't remember

32. What was the main reason you were dissatisfied with the timeshare/holiday club during the last 12 months? [Single code]

You can let us know about any other reasons in the 2nd column [Multi code]

When you signed up:

- a) Pressure selling/ aggressive sales techniques
- b) Poor choice/ unable to buy exactly what I wanted
- c) Lack of information
- d) Information given was unclear

Using the service:

- e) Scam/ fraud e.g. property/ holiday did not exist
- f) Difficulty getting the dates I wanted for my holiday
- g) Service not as described (e.g. properties or locations)
- h) Special requests not provided (e.g. specific accommodation or disabled access)
- i) Poor standard of property (e.g. cleanliness, state of repair)
- j) Poor customer service
- k) Difficulty reselling – unable to resell timeshare e.g. property worth less than originally paid

Price and payment:

- l) Dispute over contract terms
- m) Dispute over cancellation/ refund e.g. could not cancel contract within cooling off period
- n) Additional charges that I was not expecting
- o) Total cost different to that agreed
- p) Other, please specify...

33. Is there anything else you would like to tell us about the problem you experienced with your timeshare/ holiday club? [Open]

MODULE G: PACKAGE HOLIDAY

You previously mentioned you had a negative experience relating to a package holiday in Europe; the following questions are about the problems you had.

If you had negative experiences on more than one occasion in the last 12 months just tell us about the time when you had the most problems.

34. Which country were you travelling to when you had problems with your package holiday?

If you travelled to more than one country choose the country that you spent the most time in.

a) **[Drop down list - all European countries]**

b) Other, please specify...

35. How did you book your package holiday? [Single code, randomise]

a) Direct with the tour operator

b) Travel agent

c) Price comparison website (one site that compares prices from multiple companies)

d) Other, please specify...

36. What method did you use to book your package holiday? [Single code, randomise]

a) Internet (email/website)

b) Using an app (mobile/tablet)

c) By telephone

d) By post

e) In person

f) Other, please specify...

37. What was the main reason you were dissatisfied with your package holiday? [Single code]

You can let us know about any other reasons in the 2nd column **[Multi code]**

Holiday booking:

a) Poor choice/ unable to book exactly what I wanted

b) Lack of information

c) Information given was unclear

d) Poor customer service from tour operator

Transport and accommodation:

e) Flight delayed

f) Flight cancelled

g) No record of my booking when I arrived

h) Special requests not provided (e.g. specific seat or disabled access)

i) Poor standard of plane (e.g. cleanliness, state of repair)

j) Luggage lost or delayed

k) Luggage damaged

l) Problems with transfers between airport and accommodation

m) Sent to a different hotel to that booked

n) Given a different size/ type of room to that booked

o) Special requests not provided (e.g. adjoining rooms, disabled access, baby cot)

p) Poor standard of accommodation (e.g. cleanliness, state of repair)

q) Poor quality of food at accommodation (if available)

r) Holiday not as described

Price and payment:

s) Dispute over cancellation/ refund

t) Additional charges I was not expecting (e.g. transfers, telephone or mini bar)

u) Total cost different to that agreed

v) Other, please specify...

38. Is there anything else you would like to tell us about the problem you experienced with your package holiday? [Open]

COMPLAINTS

Q39-Q43 'COMPLAINTS' - ASK ALL AT THE END OF EACH MODULE COMPLETED

39. Did you complain to anyone about the problems you experienced with your [pipe in service used]?

- a) Yes
- b) No

40. Who did you make a complaint to?

Please tick all that apply [Multi code]

- a) Directly to the company providing the service
- b) A trade association that the company I used was a member of
- c) Independent dispute resolution – e.g. an ombudsman, arbitration service or mediator
- d) European Consumer Centre (ECC)
- e) Another consumer organisation in my own country
- f) Friends and family
- g) Media e.g. TV, radio, newspaper
- h) Internet feedback e.g. public review site
- i) Other – please specify

41. How satisfied were you with the outcome of your complaint?

[Pipe in each organisation mentioned in Q41 – or add a 'not applicable' column]

	Not at all satisfied	Slightly satisfied	Satisfied	Very satisfied	Completely satisfied	Complaint still being dealt with
Service provider						
Trade association						
Independent dispute resolution						
European Consumer Centre (ECC)						
A consumer organisation in my own country						
Friends and family						
Media e.g. TV, radio, newspaper						
Internet feedback e.g. review site						

42. If you didn't complain directly to the service provider, why not?

Please tick all that apply. [Multi code]

- a) I want to but haven't had time
- b) I didn't know who to complain to
- c) It seemed too complicated/ difficult
- d) I didn't think that my complaint would be successful
- e) I didn't think that the service provider would respond well
- f) I wasn't sure about my rights as a consumer
- g) Other, please specify...

43. Is there anything else that you would like to tell us about the complaint you made or how it was handled? [Open]

OTHER SERVICES USED

ASK ALL

44. During the last 12 months have you bought or used any of the following services from a company based in a European country different to your home country?

Please tick all that apply **[Multi code]**

- a) Financial services – e.g. bank account, savings account, insurance
- b) Beauty services – e.g. spa, cosmetic surgery
- c) Health services – e.g. dentist, optician, doctor, surgeon
- d) Postal services – e.g. sent a letter or parcel from abroad
- e) Property services e.g. estate agent, letting agent, removal company
- f) Online shopping - e.g. electrical items, car, book, CD or DVD

GENERAL INFORMATION

ASK ALL

Before ending the survey we would like to know a little more about you.

45. Are you...?

- a) Male
- b) Female

46. Which of the following age ranges do you fall into?

- a) 18-24
- b) 25-34
- c) 35-44
- d) 45-54
- e) 55-64
- f) 65-74
- g) 75+

47. Do you consider yourself to have a disability?

- a) Yes
- b) No
- c) I'd prefer not to say

48. To improve our understanding of the problems that people experience when travelling in Europe we may want to contact you for more information. Would you be willing to be contacted by one of our researchers?

- a) Yes **GO TO Q53**
- b) No **[CLOSE]**

49. Would you be happy to be contacted by an English-speaking researcher, if a researcher that speaks your own language is not available?

- a) Yes – I may be contacted in English
- b) No – I do not speak English

50. Please provide your contact details. These details will be kept in confidence and only given to the researcher that contacts you.

14.3 ANNEX 3 - Sample Demographics

14.3.1 Gender

Around a third of respondents (34.3%) were female. Almost two thirds were male (62.7%). 3% declined to answer this question.

14.3.2 Disability

The majority of respondents (89.2%) did not have a disability. 7.4% said that they did have a disability. 3.3% declined to answer this question

14.3.3 Age

The base sample is well populated with middle to older age groups, and lacking slightly in younger age groups. This may not be surprising, considering the topic of the survey. It might be that younger people have fewer opportunities and financial resources to travel.

Only 13.4% respondents were under the age of 35. Just over half (50.9%) were aged 35-64 and 35.9% were aged 65 or over.