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WHO CANNOT AFFORD ONE WEEK ANNUAL HOLIDAY? AN INSIDE LOOK AT EUROPE: SOCIOECONOMIC DETERMINANTS AND IMPLICATIONS FOR SOCIAL POLICIES

Abstract: This paper aims to show through a cross-country comparative analysis if, and to what extent, the inability to afford paying for one week annual holiday away from home in European countries, is associated with specific household socioeconomic characteristics. Such evidence would help central and local governments to define those economic and social goals which should be given more attention in social policies on tourism.

Keywords: Social tourism, social policy, households, Europe.

1. Introduction

The right to rest and leisure is recognized by the Universal Declaration of Human Rights (1948)¹ and by the Constitutions of several European countries, a right achieved after strong trade union struggles. The turning point for the acquisition of such rights took place with the introduction of paid leave in industrialized coun-

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The present work is a summary of the whole thesis in Analysis and Management of Tourism Activities and Resources - Project Evaluation - Methods & Techniques - Faculty of Economics - Sapienza University of Rome discussed by Valentina Brosio and supervised by Prof. Isabella Santini.

¹ Art. 24 - Everyone has the right to rest and leisure, including reasonable limitation of working hours and periodic holidays with pay.

tries, which, had already been granted in England since 1871, and was officially recognized by the International Convention of Geneva 52, in 1936², subsequently providing a significant incentive for the development of the tourism sector.

The availability of free time, however, appears to be a necessary but not a sufficient condition for making trips and holidays, which are also conditioned by people's economic status and by any constraints of mobility resulting from specific physical disabilities.

All actions to remove these barriers are part of the activities promoted by Social Tourism, a sector based on the principles of belonging, sharing, solidarity and rights, and it pays specific attention to relational aspects, socialization, and the environment.

According to the European Economic and Social Committee³ and to the International Bureau of Social Tourism (BITS) – which has recently changed its name to International Social Tourism Organization (OITS-ISTO)⁴ – a social tourism activity must meet three requirements: 1) a partial, or total, economic incapacity to exercise the right to vacation must be ascertained; 2) a public or private institution promotes actions to reduce or remove impediments; 3) the actions must be guided by the principles of sustainability, accessibility and solidarity.

Social tourism can therefore be interpreted as “a right and a social work, physically and economically accessible even to people who for various reasons cannot exercise the inalienable right to holiday” (Dall’Ara, Montanari, 2005) and must encourage both public and private institutions proposals that provide access to

² Holidays with Pay Convention, 1936 (No. 52) *Convention concerning Annual Holidays with Pay* (Entry into force: 22 Sep 1939) Adoption: Geneva, 20th ILC session (24 Jun 1936) - <http://www.ilo.org/dyn/normlex/>.

³ The European Economic and Social Committee (EESC) is a consultative body of the European Union. Committed to European integration, the EESC contributes to strengthen the democratic legitimacy and effectiveness of the European Union by enabling civil society organizations to express their views at European level (see for details <http://www.eesc.europa.eu/>).

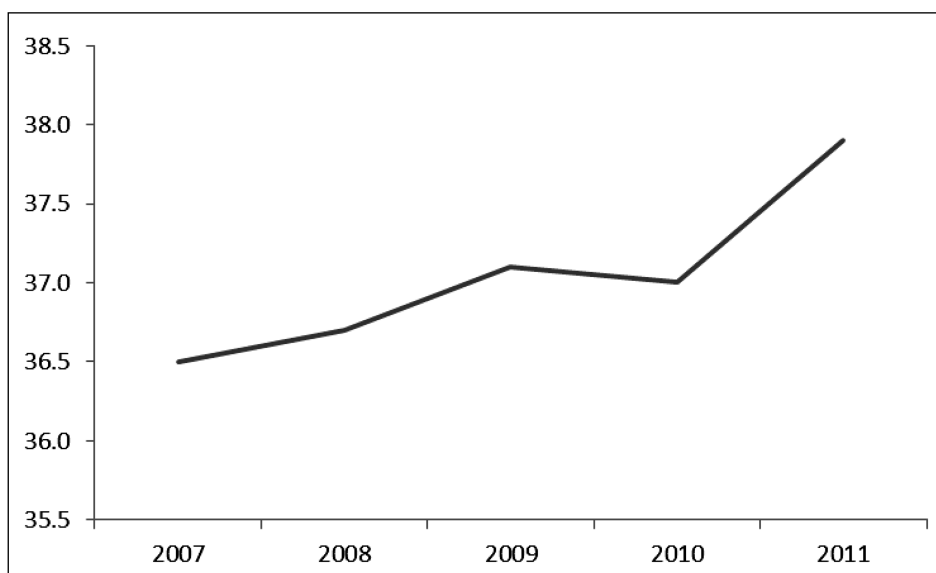
⁴ The International Social Tourism Organization, initially created under the name International Bureau for Social Tourism (B.I.T.S.) in 1963, is an international non-profit association, whose aim is to promote access to tourism for all, and more particularly for low-income population groups, young people, families, senior citizens and disabled people. With its worldwide network of members, the ISTO is nowadays considered the true world organization of social tourism. ISTO members include associations, trade unions, cooperatives, private organizations, as well as public authorities in charge of tourism.

travel and holidays to disadvantaged social groups and disadvantaged individuals, such as: 1) economically disadvantaged households; 2) the elderly and retired; 3) the disabled; 4) young people.

Social Tourism is a rapidly emerging sector in Europe and in several countries (cfr. France, Belgium, Spain, Portugal, Italy) is part of public policy. Implementation forms vary among countries but necessarily also according to the changing economic conditions.

In 2011, 36,7% of european (UE27) households, a total of 190 million persons, could not afford a holiday away from home and since 2007 this percentage has gradually increased with a significant leap ahead in 2010 when the economic crisis hit all the European countries (Figure. 1).

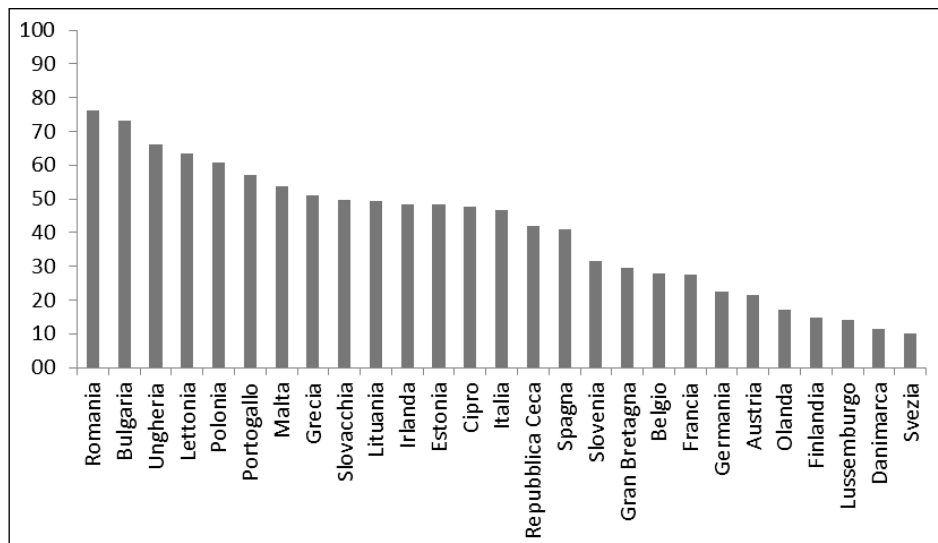
Fig. 1 - Inability to afford paying for one week annual holiday away from home UE27 (as % of total population).



Source: EUROSTAT.

Moreover, this percentage differs significantly between countries (Figure. 2) as the inability to afford paying for one week annual holiday depends on a variety of socio-economic and environmental factors.

Fig. 2 - Inability to afford paying for one week annual holiday away from home - UE-27 2011 (as % of the total population).



Source: EUROSTAT.

This paper aims to show through a cross-country comparative analysis if and to what extent the inability to afford paying for one week annual holiday away from home in European countries is associated with specific household socioeconomic characteristics and environmental factors. Such evidence would help central and local governments to define those economic and social goals which should receive more attention from social policies on tourism.

In order to pursue this aim a multiple correspondence analysis (MCA) is carried out. The empirical analysis is based on the 2011 EU-SILC survey.

2. Data and methodology

A multiple correspondence analysis (MCA) is carried out on 217.340 sample units (households) from the 2011 cross-sectional EU-SILC survey,⁵ so as to depict the main associations between

⁵ EU-SILC is the Eurostat project on Income and Living Conditions, which involves all the 27 European countries. EU-SILC is the reference source for com-

the variable *Inability to afford paying for one week annual holiday away from home*⁶ (set as supplementary variable together with the variable *Country*) and three sets of active variables (20 in all with 88 categories) describing, respectively:

- 1) the respondent socioeconomic characteristics⁷: age, gender, marital status, education, employment status, branch of activity;
- 2) the household socioeconomic characteristics: tenure status, dwelling type, household type, equivalized disposable income, poverty indicator, financial burden of housing cost, ability to afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day; ability to afford an unexpected required expense; ability to make ends meet;
- 3) some dwelling and environmental characteristics which point out possible households poor living and economic conditions: leaking roof, damp walls/floors/foundation, rot in windows frames or floor; dwelling too dark; too much noise in the dwelling from neighbors or from outside (traffic, business, factory); pollution, grime or other environmental problems in the local area such as smoke, dust, unpleasant smells or polluted water; problems of crime, violence or vandalism.

A complete list of all variables is provided in the appendix (Table A1, A2, A3).

parative studies on income distribution, poverty and social exclusion at european level (Santini, De Pascale, 2012a, b) with the purpose of monitoring household economic and social conditions for context aware planning of economic and social policies (Clemenceau et al., 2006). EU-SILC provides two types of data, cross-sectional and longitudinal over a four-year period (EU-SILC uses a four-year rotational design). These data were available under the Eurostat research contract EU-SILC/2011/18.

⁶ It corresponds to the question *Can your whole household afford to go for a week's annual holiday, away from home, including stays in second dwelling or with friends/relatives?* and its categories are No and Yes.

⁷ Respondent's socioeconomic characteristics are included as active variables to take into account the features of the person who answers the household questionnaire on behalf of the whole family, and, in particular, the question on the inability to afford paying for one week annual holiday away from home.

3. Results

The variability explained by the first principal plane of MCA is around 50% (computed with the correction formula due to Benzécri, 1979).

The results of the MCA show that in Europe the inability to afford paying for one week annual holiday away from home is associated with at least two aspects:

- 1) the household economic conditions;
- 2) the age of the respondent.

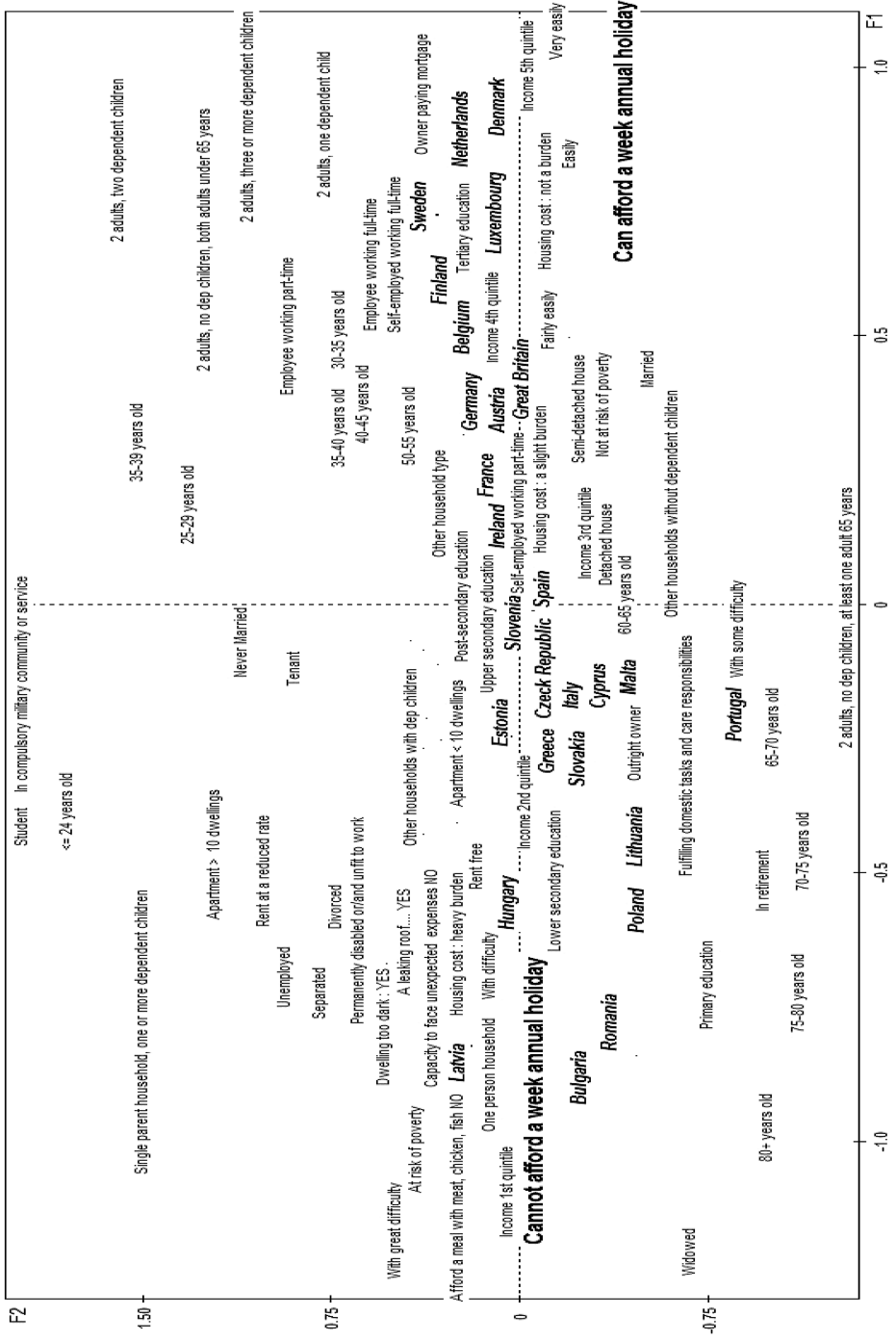
The household economic conditions go through different variables such as household disposable income and living conditions, tenure and dwelling type, some respondent's socioeconomic characteristics (i.e. education, employment status), as clearly shown by the first factorial axis (see Fig. 3). As a matter of fact, the inability to afford paying for one week annual holiday away from home prevails in small size and severely deprived households with low equivalized disposable income and poor living conditions, whose respondents are mostly less educated and not economically active (retired, fulfilling tasks and care responsibilities, unemployed, student).

The age of the respondent which decreases as the second factorial axis coordinates increase (see Fig. 3). The respondent is the household member aged 16 and over, responsible for the accommodation.

The above results can help to identify suitable tourism policy strategies.

As a matter of fact, social tourism actions in countries where households with the inability to afford paying for one week annual holiday away from home prevails (on the left side of Fig. 3) should move along two different directions. In particular, in countries such as, for example, Latvia, Hungary and Estonia, where low levels of economic well-being and young respondents (aged between 16 and 24, unemployed or students) prevail (left upper quadrant), youth social tourism actions are recommended. Youth tourism is a relevant sector as it faces an important social challenge. Youth tourism is social in the sense that it creates jobs and in the meantime provides the opportunity to relax, which is especially important for underprivileged

Fig. 3 - Multiple correspondence analysis: projection of active and supplementary variables on F1 and F2.



youths. From this point of view, holidays can be a means of integration. It has been observed that in cities, where youth holidays had been organized, juvenile delinquency diminished. This is obviously a major challenge: giving young people access to holidays and travelling – for the good of the entire community. In countries such as, for example, Portugal, Lithuania, Poland, Greece, Italy, where poor household economic well-being, but also old respondents (aged 65 or more, retired or fulfilling tasks and care responsibilities) prevail (left lower quadrant), social tourism actions for old people are recommended. More specifically, senior tourism and accessible tourism for the poor, healthy or ill, uneducated, physically active and passive, fast aging and slow aging. A complex market due to the diversified consumer needs and demands.

4. Conclusions

This paper aims to show if and to what extent the inability to afford paying for one week annual holiday away from home in European countries is associated with specific household socioeconomic characteristics and environmental factors. Such evidence would help central and local governments to define those economic and social goals which should receive more attention in social policies on tourism.

In Europe the inability to afford paying for one week annual holiday away from home is associated with at least two aspects:

- 1) the household economic conditions;
- 2) the age of the respondent.

The analysis allows us to identify two specific directions of social tourism policies: youth and senior/accessible social tourism which has an important role in achieving health and well-being benefits; the encouragement of social interaction; the broadening of experience and the widening of horizons; the development of independence and the strengthening of family relationships. Successful development of social tourism in Europe fully depends on the activity of policy makers, local government, social and volunteer associations and tourist operators and on their ability in mutual cooperation.

APPENDIX

Tab. A1 - Respondent socio-economic characteristics.

Label	Variable name	Categories
<i>AGE</i>	Age	< 24 25-29 30-34 35-39 40-44 45-49 50-54 55-59 60-64 65-70 74-74 75-80 80+
<i>GEN</i>	Gender	Male Female
<i>MST</i>	Marital status	Never married Married Separated Widowed Divorced
<i>EDU</i>	Educational qualification	Pre-primary education Primary education Lower secondary education Upper secondary education Post-secondary education Tertiary education
<i>EMP</i>	Employment status	Employee working full-time Employee working part-time Self-employed working full-time Self-employed working part-time Unemployed Pupil, student, further training, unpaid work experience In retirement or in early retirement or has given up business Permanently disabled or/and unfit to work In compulsory military community or service Fulfilling domestic tasks and care responsibilities Other inactive person
<i>BRA</i>	Branch of activity	Agriculture Industry Construction Wholesale retail Transport and storage Hotels and restaurants Information and communication Financial and insurance activities Real estate, renting and business activities Public administration, defense, social security Education Health and social work Other Not working

Source: EU-SILC 2011.

Tab. A2 - Household socio-economic characteristics.

Label	Variable name	Categories
<i>TST</i>	Tenure status	Outright owner Owner paying mortgage Tenant or subtenant Rented at a reduced rate Provided free
<i>DTY</i>	Dwelling type	Detached house Semi-detached or terraced house Apartment or flat < 10 Apartment or flat with 10 or more
<i>TYPE</i>	Household type	One person household 2 adults both adults < 65 years 2 adults at least one adult ≥ 65 year Other without dependent children Single parent and ≥ 1 dep chi 2 adults one dependent child 2 adults two dependent children 2 adults and ≥ 3 dep children Other households & dep children Other type
<i>HDI</i>	Equivalent disposable income	1st quintile 2nd quintile 3rd quintile 4th quintile 5th quintile
<i>POI</i>	Poverty indicator	Not at risk of poverty At risk of poverty
<i>HCO</i>	Financial burden total housing cost	A heavy burden Somewhat a burden Not burden at all
<i>MEA</i>	Can your household afford a meal with meat, chicken, fish (or vegetarian equivalent) every second day?	Yes No
<i>UNE</i>	Can your household afford an unexpected required expense (amount to be filled) and pay through its own resources?	Yes No
<i>ABI</i>	A household may have different sources of income and more than one household member may contribute to it. Thinking of your household's total income, is your household able to make ends meet, namely, to pay for its usual necessary expenses?	With great difficulty With difficulty With some difficulty Fairly easily Easily Very easily

Source: EU-SILC 2011.

Tab. A3 - Dwelling and environmental characteristics.

Label	Variable name	Categories
EF1	Do you have any of the following problems related to the place where you live ? (Leaking roof. Dump walls/ floors/foundation/ rot in windows frames or floor)	Yes
		No
EF2	Is your dwelling too dark. meaning is there not enough day-light coming through the windows?	Yes
		No
EF3	Do you have too much noise in your dwelling from neighbors or from outside (traffic. business. factory)?	Yes
		No
EF4	Pollution. grime or other environmental problems in the local area such as smoke. dust. unpleasant smells or polluted water	Yes
		No
EF5	In your local area are there any problems of crime. violence or vandalism?	Yes
		No

Source: EU-SILC 2011.

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Riassunto: La presente nota si propone di evidenziare attraverso un'analisi comparativa cross-country a livello europeo per quali motivi le famiglie non si possono permettere almeno una settimana di vacanza all'anno e se questi varino tra paesi. Tale evidenza potrebbe aiutare i governi centrali e locali a definire gli obiettivi economici e sociali cui le politiche in materia di turismo dovrebbero prestare maggiore attenzione.