	"Facilitating transnational low season tourism exchanges in Europe encouraging Senior Citizens to travel" 75/G/ENT/CIP/13/B/N03S01
Grant agreement	SI2.686645
Project acronym	ESCAPE
Project Title:	European Senior Citizens' Actions to Promote Exchange in tourism

Report on Senior Tourists needs and demands

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Contractual date of delivery: 31 January 2015



This report has been produced with the financial support of the Entrepreneurship & Innovation Programme 2013 of the European Union. The contents of this publication are the sole responsibility of the ESCAPE Consortium and can in no way be taken to reflect the views of the European Commission.

Contents

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Introduction

Demographic development is having a considerable impact on a broad set of aspects in the life of everyone. With the baby boom generation moving into older age bands, the older segment of the European population is growing significantly. Such a demographic change has direct consequences also on tourism demand and implications in the ways to adapt the touristic supply.

The European Commission has been active in encouraging as many people as possible to go on holiday through the "Calypso – Tourism for All" initiative which was addressed to the most vulnerable target groups. Based on this study, and the experiences developed through a number of Calypso projects, the seniors target group proved to have great potential: this segment of the population includes individuals who have leisure time, enjoy a better health, have a higher life expectancy and possess a greater spending power than previous generations.

Through the Programme "Facilitating transnational low season tourism exchanges in Europe encouraging Senior Citizens to travel", the European Commission has financed the ESCAPE project, which brings together 8 partners from 6 different countries to work on the enhancement of the existing tourist infrastructure and staff in the low season, facilitating as such transnational exchanges off-season by concentrating on the senior citizens market. The project covers the geographical area of Belgium, Bulgaria, Cyprus, France, Italy and Portugal.

ESCAPE focuses on the development and promotion of senior transnational exchanges in 5 European countries during the low season, namely in Bulgaria, Cyprus, France, Italy and Portugal. As such it will target, on the one hand, seniors from 55 years old and over, being individuals, groups or couples, seniors with difficulties to travel alone, seniors who share common interests and hobbies, seniors who want to increase their knowledge of cultural and heritage aspects of people from other countries, and seniors who are challenged to learn to use new technologies (e.g. tablets and smartphones, use of social media).

On the other hand, the project also focuses on tourism SMEs in the 5 target countries, in particular travel, tourist accommodation, catering and transport businesses who need to realise they can be part of the de-seasonalisation process and that it is a 2-way process on which they themselves can have a direct impact.

The present report unveils the results of a tailored questionnaire, aimed at gathering some basic needs and expectations of tourists aged 55+. The questionnaire, available as Annex I, has been translated into Italian, Greek, French, Portuguese and Bulgarian, in order to better reach the older population in Italy, Greece and Cyprus, France, Portugal and Bulgaria. AGE Platform Europe, leader of the task, took care of wide disseminating the questionnaire also beyond the borders of those partners' Countries.

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The questionnaire and data collection

The ESCAPE questionnaire was designed according to a twofold approach:

- Assessing already run surveys, such as the TOURage one[1], and the literature analysis, such as the ECT Snapshot on Travel Segment[2], and the draft report “Europe, the best destination for seniors” from European Commission’s Enterprise and Industry Directorate General[3].
- Addressing the targets of the ESCAPE project, aimed at gathering the needs and expectations of tourists aged 55+ in relation to tourism and touristic service, as a first step towards the establishment of tourist packages to be further developed by the project.

The questionnaire is mainly divided into two parts:

1. Demographic characteristics: covering basic questions on age and sex, retirement and marital status, education level and Country of residence.
2. Visiting factors: this section explored the usual length of holidays, the preferred travel destinations, the preferred season(s) for travelling, the travel organization, the source of information prior to travelling, the preferred modes of transports, and the importance of tourist themes, the interests, and key factors on infrastructure and facilities.

The questionnaire was designed to be easily filled in about 10, maximum 15 minutes, with 22 questions, mainly tick-box ones (some of them allowing multiple choices, when relevant), and a few open ones (e.g. on the Country of residence and the next country the respondent would like to visit).

The questionnaire has been available for 3 weeks and accessible on-line, as well as in paper version. An overview of the total replies divided by Country of origin follows hereafter:

COUNTRIES OF RESIDENCE (Open replies)

Italy	219
Portugal	163
Cyprus	156
Ireland	26

[1] Project “Developing Senior Tourism in Remote Regions” (TOURAGE), “*What are the needs of senior tourists in TOURAGE regions*?”, report of the results of the Questionnaire for local senior on tourism
[2] ETC Snapshot is a series of reports on select travel segments and markets prepared by the ETC, the European Travel Commission (http://www.etc-corporate.org/?page=about-etc) Executive Unit.
[3] European Commission, “Europe, the best destination for seniors. Facilitating cooperation mechanisms to increase senior tourists’ travels, within Europe and from Third Countries, in the low and medium seasons”, DG Enterprise and Industry

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Greece	26
Denmark- Faroe Islands	17
UK	10
Netherlands	8
Malta	8
France	51
Poland	7
Germany	4
Czech Republic	4
Sweden	3
Belgium	4
Lithuania	2
Brasil	2
Turkey	1
Spain	3
Slovenia	1
Hungary	1
Bulgaria	151
Austria	1
USA	1
Albania	1
No indication	34
	904

A total of 42 replies were not valid, as not complete (less than 50% answered replies).

The following paragraph illustrates the results for all questions, providing a more focused overview of the results coming from 904 questionnaires.

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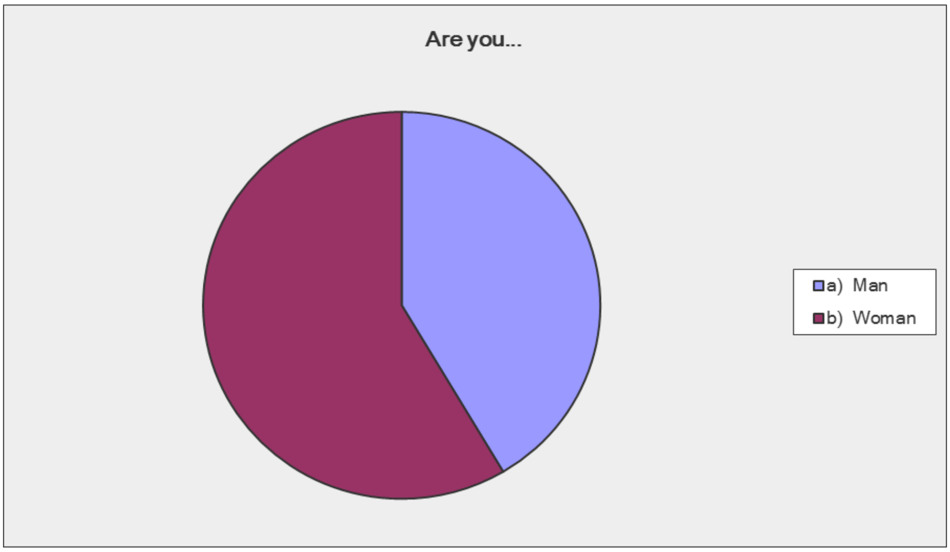
Overview of data

a) Demographic data

This paragraph presents questions and replies for each question, encompassing also highlights on the open questions, and combining replies coming from demographical data with visiting factors and preferences, for achieving more meaningful analysis.

Q1. Are you...		
Answer Options	Response %	Response Count
a) Man	41,5%	372
b) Woman	58,5%	525
	answered question	897
	skipped question	7

The majority of replies came from women (almost 60% of respondent, quite in line with the general population trend). It is hard to state the exact reason behind this (e.g. older women are quantitative more numerous than older men; older women are more active and respondent than older men; tourism is a sector where women tend to be more interested in, …), but it is important to state such an important data, in order to analyse whether there might be gender differences in the replies to further questions.



Q2. How old are you?		
Answer Options	Response Percent	Response Count
a) 55-60	34,2%	307
b) 61-65	24,5%	220
c) 66-70	19,6%	176

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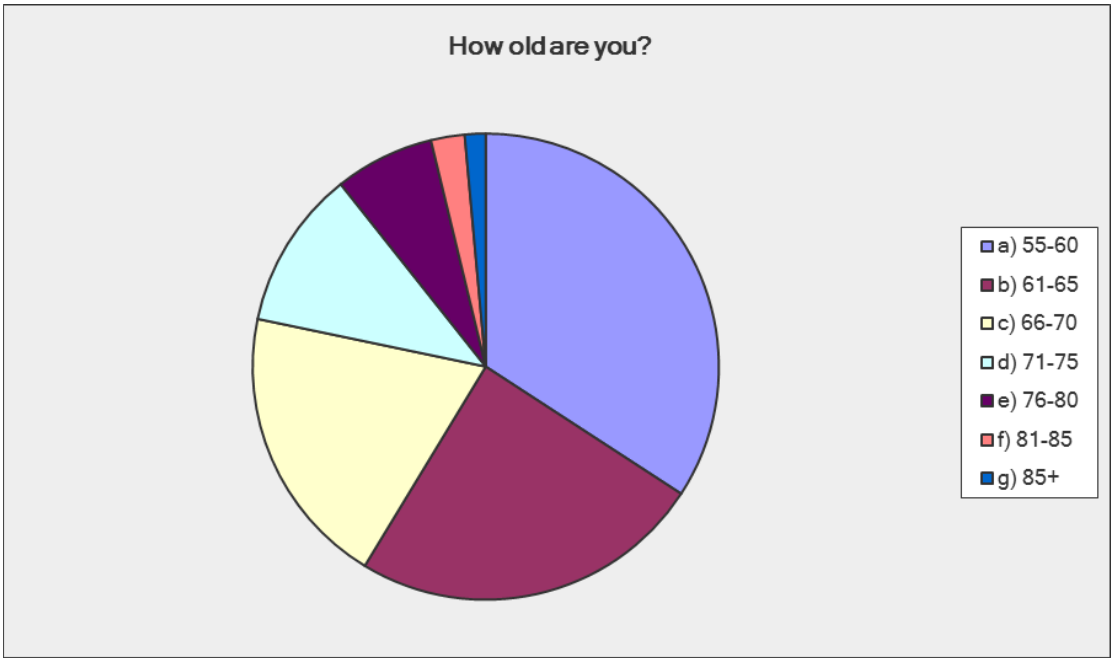
d) 71-75	11,0%	99
e) 76-80	6,9%	62
f) 81-85	2,3%	21
g) 85+	1,4%	13
	answered question	898
	skipped question	6

The most selected age range belonged to the younger cohort (55-60 years old), with an average age ranging around 66-75 years. Some 13 respondents belonged to the oldest range, aged 85+.



Q3. Are you retired?		
Answer Options	**Response Percent**	**Response Count**
a) Yes, retired full-time	32,6%	424
b) Yes, retired part-time	3,5%	45
c) no	29,0%	378
If yes: how long have you been on retirement?		455
	answered question	1302
	skipped question	10

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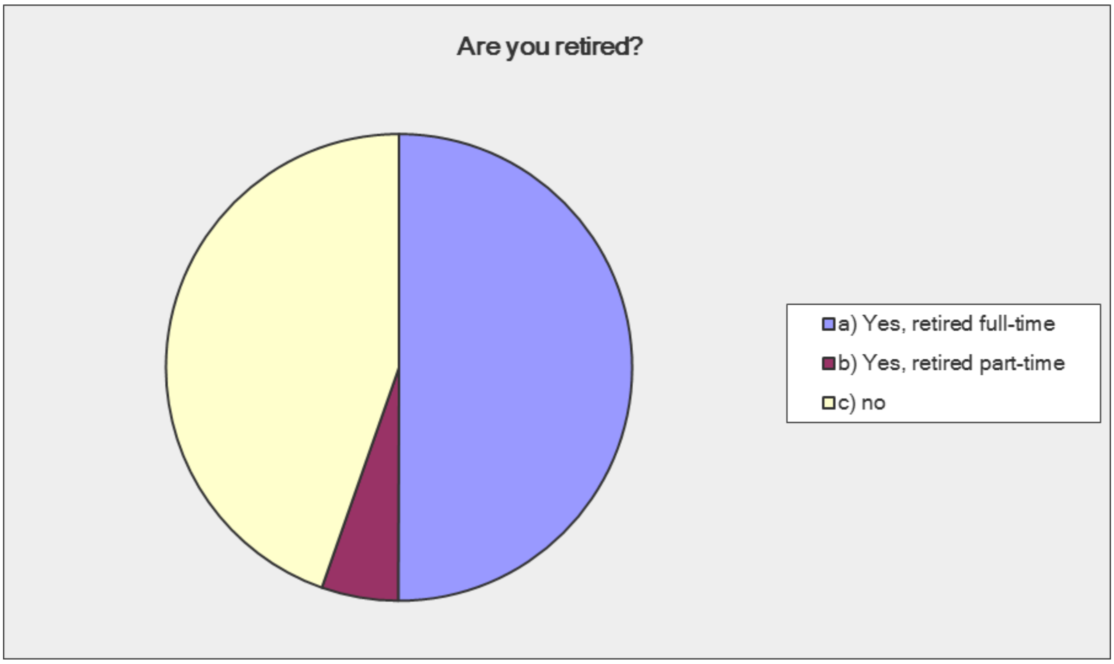
The majority of respondent declared being full-time retired people (36%), although the number of non-retired persons is right below this percentage (29%). If such a trend is confirmed across the Countries, it is interesting to state that this statistics differs in the Bulgarian replies, where the majority declared not being retired.

An open question asked for how long the respondents have been in retirement. Replies vary a lot, but on average it is for about 10 years.



Q5. On marital status: are you		
Answer Options	**Response Percent**	**Response Count**
a) Single	6,5%	58
b) Married / in a relationship	67,5%	603
c) Divorced	10,9%	97
d) Widow(er)	15,1%	135
	answered question	893
	skipped question	11

67.5% of replies belonged to persons in a couple. This result can be combined with Q14 on the preference regarding the travel mates: the majority of the replies enjoy the company of the partner (38%) and of relatives and friends (28%). The 20% of replies also like to travel in group with people they know (a very minor percentage enjoys going on holiday in group with unknown people; this discriminant was an interesting point to highlight).

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Q6. What is your level of education?		
Answer Options	Response Percent	Response Count
a) Primary Education (elementary school)	9,9%	88
b) Secondary Education (secondary school)	30,7%	273
c) Tertiary Education (university and post-graduate)	54,0%	481
d) Other (please specify)		48
	answered question	890
	skipped question	27

The majority of respondents have university or post-graduate degrees (54%), 30% of them have a secondary school degree. Such a result is a very positive one, showing that among the most respondent age-range (55-65), the level of education is among the highest. There is no evidence of the knowledge of a foreign language, and especially of English, among the respondents, but it is more likely that those with higher education level can rely on at least one additional language, thus coping with one of the most powerful barrier to travels abroad.

b) Methodological data

The questionnaire explored also various ways and means of travel and trips' organization to gather some relevant methodological insights.

When asked about the "company" for trips and holidays, the majority of the respondent opted for travelling with a partner, followed by the company of relatives and/or family members. About 20% of the replies like to travel in groups, but with known people, while very few opted for travelling with people never met before.

Q14. When on holiday, do you travel:		
Answer Options	Response Percent	Response Count
a) Alone	6,0%	52
b) With a partner	37,9%	329
c) With relatives / family	28,3%	245
d) With grand-children	4,6%	40
e) In group, with people I know	20,3%	176
f) In group, with people I have not met before	2,9%	25
g) Other (please specify)		53

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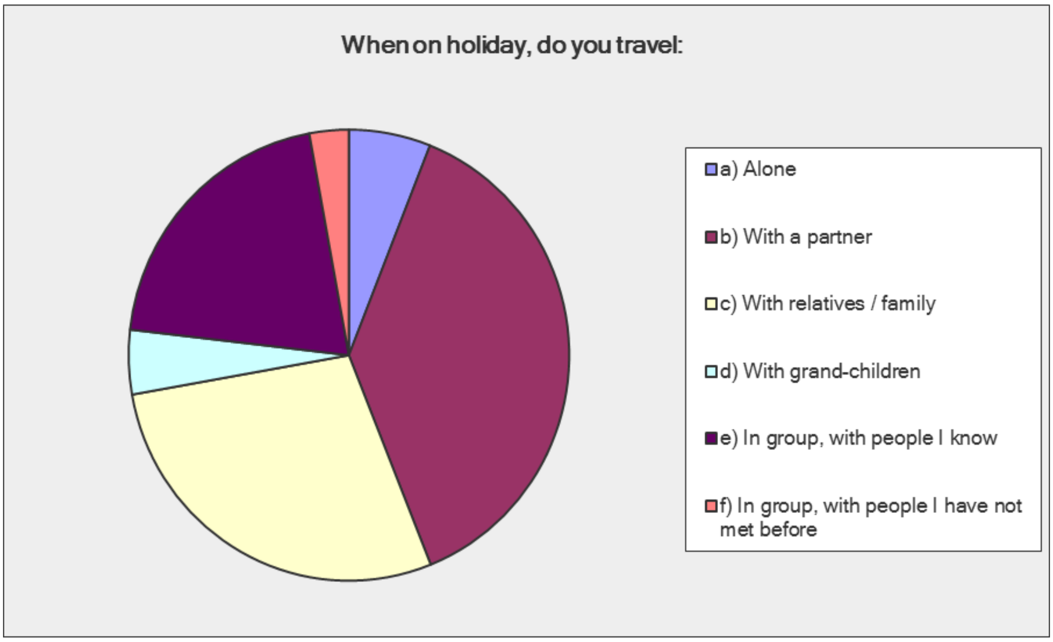
answered question	867
skipped question	37

The “Other” replies mentioned mainly a second choice, reinforcing the replies for c) “with relatives and family” and e) in group with known people.



Once questioned on the preferred destinations, here it is an overview of the replies gathered. This question can be linked with the open question no. 21 “which country did you visit last?”. When indicating “abroad” the majority of respondents opted for Spain, Greece, Latin America (especially Brazil), African countries, and Italy. Such a trend is more or less confirmed also by the replies to the open question no. 22 “What is the next Country you plan to visit”, although here Asian and Pacific destinations take over on Spain and Italy.

Q9. Where do you mostly travel?		
Answer Options	Response Percent	Response Count
a) Abroad	50,9%	448
b) In home country	41,7%	367
c) In your own region	7,5%	66
	answered question	881
	skipped question	23

51% of replies opt for travelling abroad; while still a good percentage (almost 42%) prefer to travel in its home country. The domestic tourism is an important component, but travels in own region is still not very popular or it may not be considered as “proper travelling” by the respondents.

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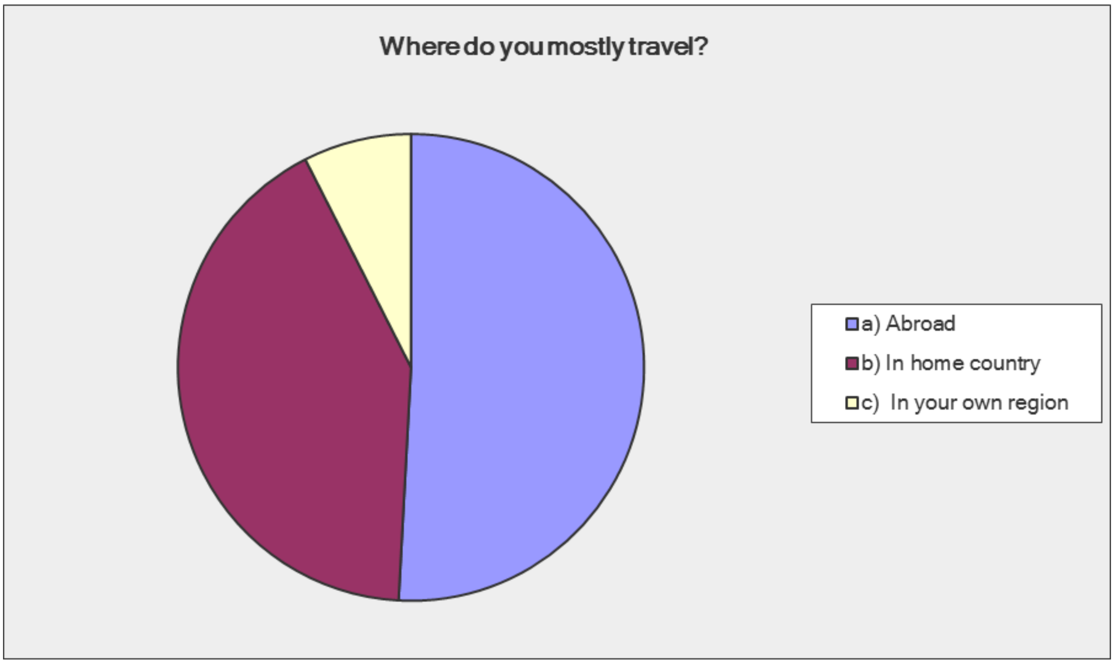

With regard to the average daily budget, the majority of respondents went for a budget limited to up to 100 Euros/ a day, excluding air tickets, while still a significant portion (almost 38%) opts for a slight higher budget, up to 300 Euros/a day.

Q7. What is your average daily budget while on holidays abroad (excluding air tickets)?		
Answer Options	**Response Percent**	**Response Count**
a) Up to €100 / day	55,7%	482
b) €101 - €300 / day	37,8%	327
c) €301 - €500 / day	4,0%	35
d) €501+	2,4%	21
	answered question	865
	skipped question	39

Such a reply can be coupled with the usual length of holidays, to become more meaningful. Most of replies went for a low-middle length (4-7 nights – 42,7%), with some 33% of replies opting for a longer length (8-13 nights).

Q8. What is the usual length of your holidays?		
Answer Options	**Response Percent**	**Response Count**
a) 1-3 nights	7,2%	64

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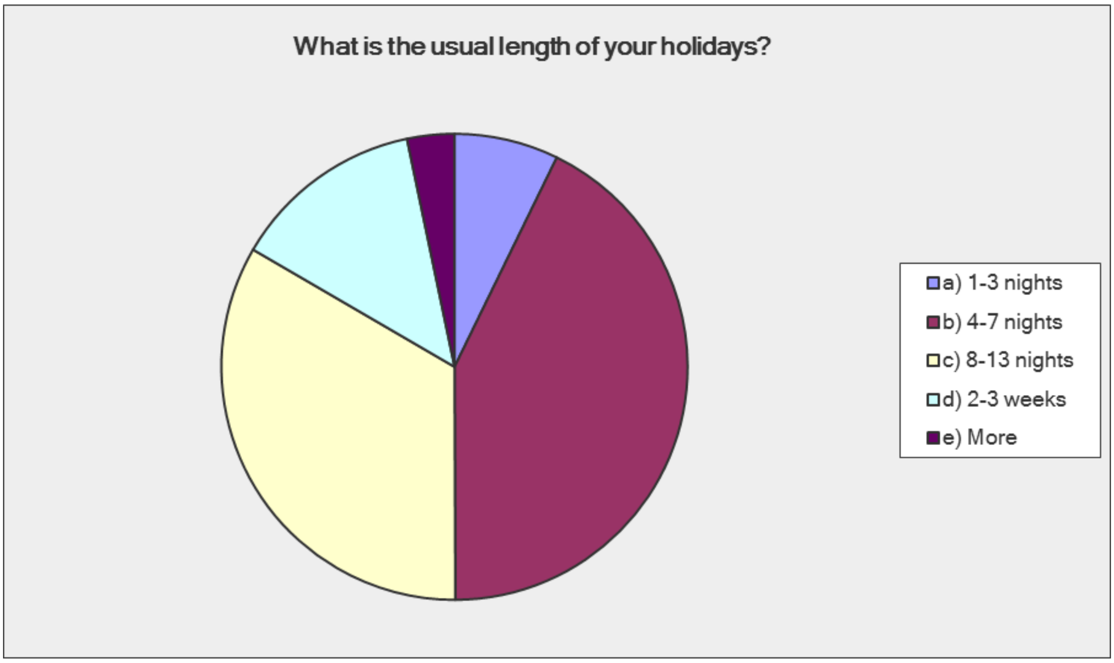
b) 4-7 nights	42,7%	378
c) 8-13 nights	33,4%	296
d) 2-3 weeks	13,3%	118
e) More	3,3%	29
	answered question	885
	skipped question	19



What follows is a very key question for ESCAPE, dealing with low season tourism. The majority of respondents prefer to have holidays in the summer (almost 37%), but a consistent percentage (almost 32%) likes to take breaks during the spring. Winter is not a very appreciated season, but autumn is not considered very negatively, as 16% of respondents opted for this season. Among the “other” replies, more than 100 replies, however, specified that winter and autumn are also good season for travelling, respectively with 26 replies in favour of winter and 68 of autumn out of 123 replies.

Q10. When do you prefer to travel?		
Answer Options	**Response Percent**	**Response Count**
a) Spring	31,8%	375
b) Summer	36,6%	431
c) Autumn	16,1%	190
d) Winter	5,0%	59

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Other (please specify)	123
answered question	**1178**
skipped question	**32**

With regard to the methodology in organizing trips, the following question tried to dig into this.

Q11. When you organize your holiday, do you prefer to:		
Answer Options	**Response Percent**	**Response Count**
a) Arrange only travel & accommodation	57,0%	510
b) Arrange an all-inclusive package (i.e. travel, accommodation, meals and tours)	37,4%	335
c) Other (please specify)		50
	answered question	**895**
	skipped question	**59**

In this category, the preferences go for the arrangement of travel and accommodation only.

Among the 50 specifications, the majority went for stating that the travel is self-planned and self-managed.

Interesting is an open reply, stating that when travelling in Nordic country, the respondent arranges only travel and accommodation, while when travelling elsewhere s/he opts for all inclusive packages. Likewise, another respondent specified that accommodation and travel arrangements depend on the type of holiday: all-inclusive for sunshine and relax, self-arranged for visiting cities.

Q12. How do you usually organize your holiday? (multiple answers allowed)		
Answer Options	**Response Percent**	**Response Count**
a) I organize it individually	50,9%	502
b) I rely on a travel agency	28,8%	284
c) I rely on organized travels (e.g. by older people associations, parish associations, ...)	20,4%	201
	answered question	**987**
	skipped question	**22**

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Holidays tend to be organized individually by almost 51% of the interviewed people. However a good percentage also likes to rely on travel agencies, as well as on travels organized by parish association or associations of other kinds.

In that respect, it is useful to link these replies with these following ones, showing that although parish and older people associations are helpful in the organization of trips, they are not among the top choices when more information is needed on the trip itself. In that regard, the respondents rely more on the exchange with relatives and friends, as well as in the internet, rather than in other tools, such as social media and even travel agencies.

The majority of open questions (“other” choice) mentioned that the choice really depends on the type of trip, the kind of destination and the partners of the trip. These main factors can help better orientate the choice, according to the replies gathered.

Q13. What are your main sources of information when choosing your holiday destination?		
Answer Options	Response Percent	Response Count
a) Relatives and friends	28,3%	291
b) Internet	25,2%	259
c) Social media	2,2%	23
d) Travel Agencies	15,2%	156
e) Guidebooks and magazines	10,9%	112
f) Associations (older people organisations, parish organisations, ...)	6,5%	67
g) Other (please specify an alternative or more options applying to your case)		121
	answered question	1029
	skipped question	40

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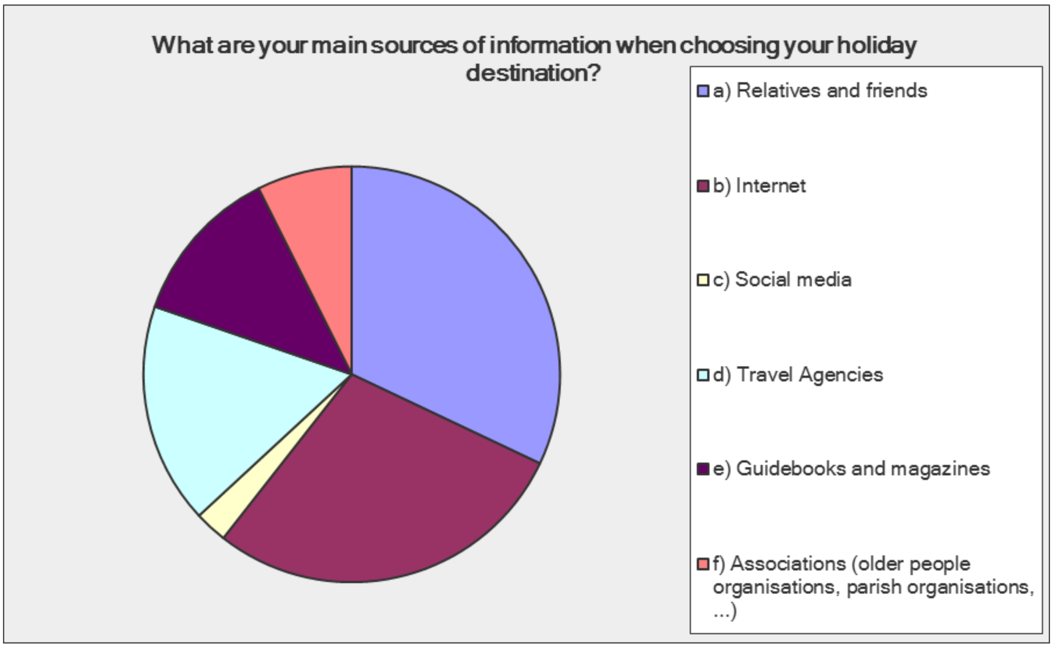

Among the preferred transport means is the plane, as the table below shows. The car is the second choice, but just for about 26% of the respondent. The campervan was cited among some of the respondent to the "other" choice, while others considered specifying that often it is a combination of various means and of what is available to reach the wished destination.

Q15. Do you prefer to travel by		
Answer Options	**Response Percent**	**Response Count**
a) Plane	40,0%	486
b) Boat	8,2%	100
c) Train	8,9%	108
d) Bus	14,4%	175
e) Car	26,3%	319
f) Bike	1,0%	12
g) Other (please specify)		15
	answered question	**1215**
	skipped question	**41**

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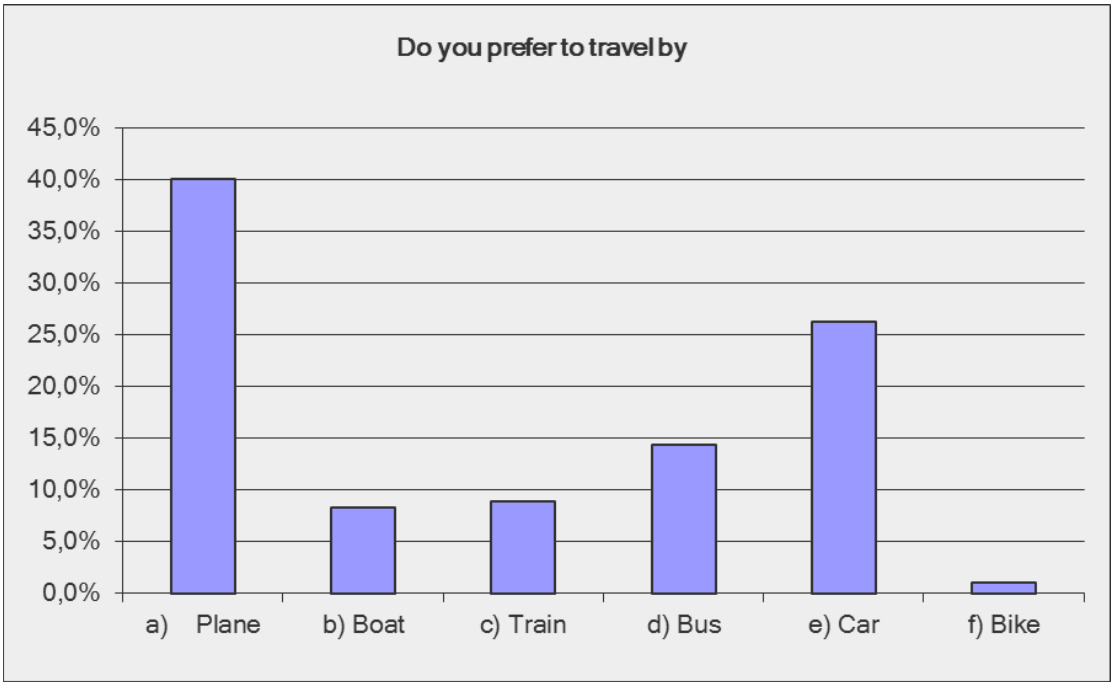


c) Rating preferences

Themes of special interest

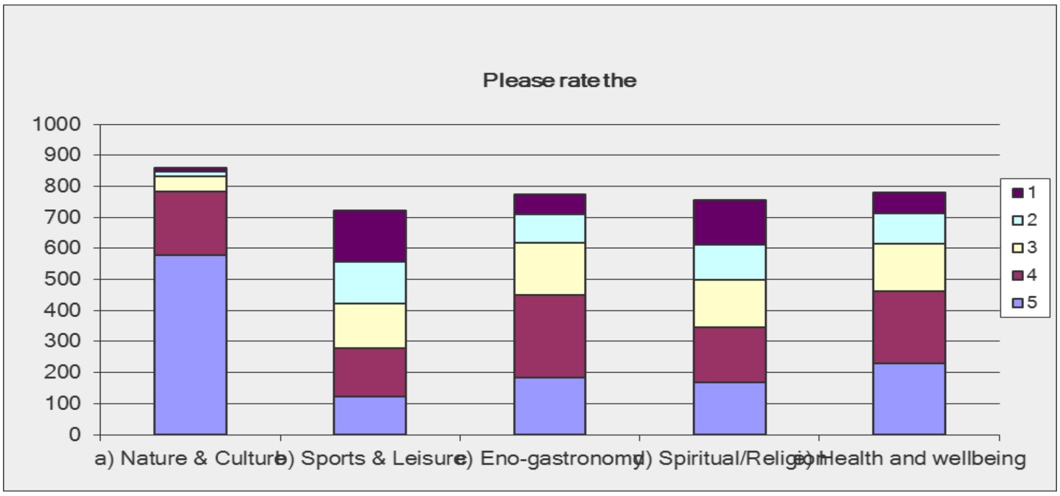
The closing questions aimed at understanding the importance of themes, activities and services by the respondents. Here follows a presentation of each reply, with the highlight on the most preferred options by tourists aged 55+.

Looking at special tourist themes, the majority of replies favoured the following themes: nature and culture (858 replies), followed by health and wellbeing (780 replies) and eno-gastronomy (774 replies). Digging into the various preferences, it emerges that "nature and culture" is a very important theme, and health and wellbeing scores between the rank 4 and 5. Eno-gastronomy also scores 4 (important), as well as the remaining categories. Having a look to the median and standard deviation's coefficient, natural and cultural options are confirmed as the most privileged.

Q16. Please rate the importance of the following themes when choosing your holiday destination, using the scale (1-5), where 1=not important and 5=very important Special Interest Tourism Themes: How important are these themes for you when choosing your holiday destination?

Answer Options	1	2	3	4	5	Response Count
a) Nature & Culture	12	14	48	205	579	858
b) Sports & Leisure	167	134	144	155	123	723

c) Eno-gastronomy	64	93	168	266	183	774
d) Spiritual/Religion	144	114	151	179	168	756
e) Health and wellbeing	68	98	153	233	228	780
f) Other (please specify)						15
					answered question	3906
					skipped question	35



When exploring the mean evaluation and the coefficient of variation of the gathered replies, it results that “nature and culture” receives a mean evaluation of 4,5, in the scale of 1 to 5, being clearly the most important theme, when people in the sample choose their holiday destination. “Health and wellbeing” and “Eno-gastronomy” have roughly the same relevance (with mean scores of 3,6 and 3,5, respectively). “Spiritual and religion” and “Sports and leisure” are less relevant, if we consider the whole sample (3,1 and 2,9, respectively). Although less important, generally, these two last themes are still very relevant, for a smaller group of people (46% of respondents rate “”Spiritual and religion” with a 4 or a 5; 38% rate “Sports and leisure” with a 4 or a 5).

When having a look to the same categories as perceived by different age ranges, it is possible to confirm the trend that sees natural and cultural themes as well important across the age groups, followed by health-related themes and eno-gastronomy. It is however interesting to note that spiritual and religious issues climb the ladder of importance as far as the age raised from 70 and beyond.

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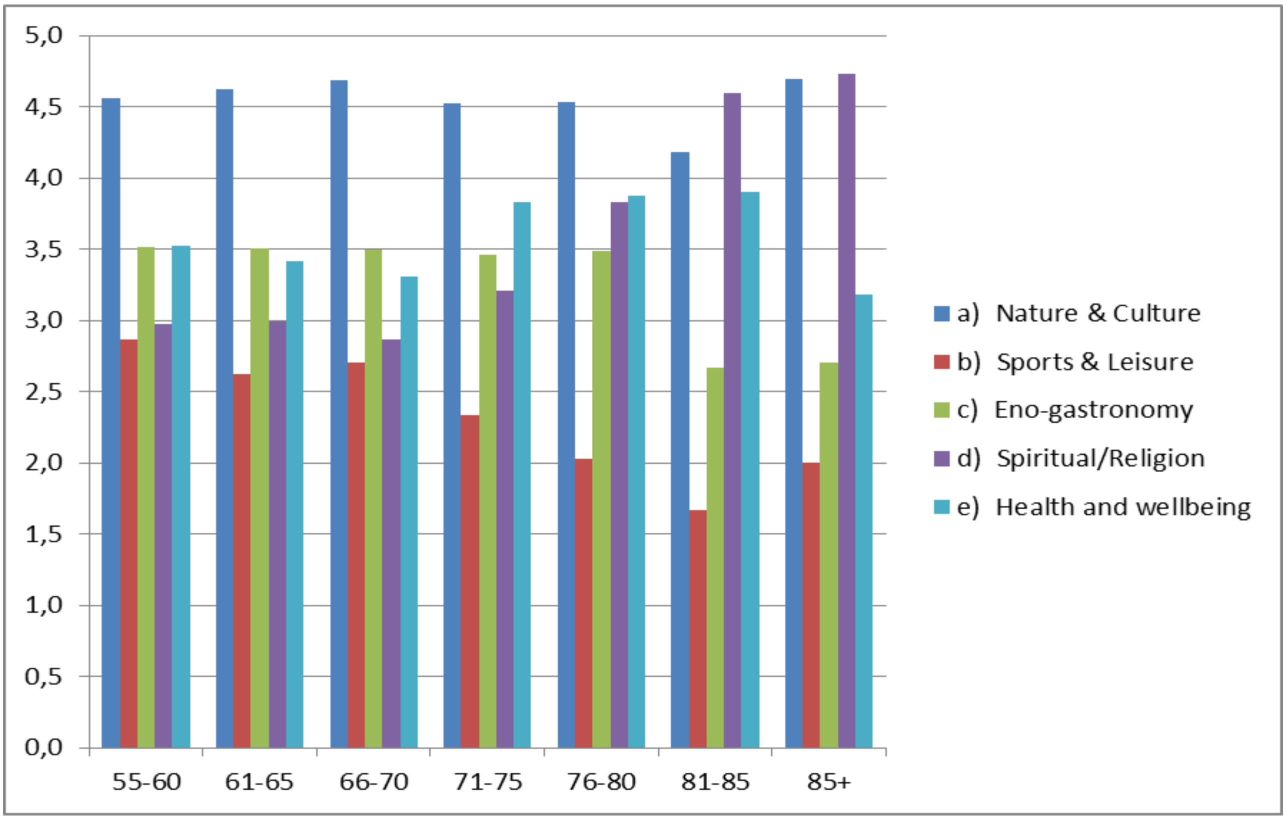

Ranking themes and preferences

Asked to rate the importance of sports and leisure activities while on holiday, the majority of respondents opted for hiking and swimming, which also gathered the highest preferences, while sailing, golf and yoga have not been rated as very important activities.

When looking at the means and standard deviations, none of the activities suggested receives a positive evaluation (above 3,0), when the respondents are asked about the interest on activities, while on holiday. All activities have a mean evaluation below 3,0. The only two activities that get close to a positive evaluation are swimming (2,9) and hiking (2,7). The rest of the activities receive a lower, and roughly similar, interest evaluation – with a mean score between 2,1 and 1,8.

Q17. Please rate your level of interest for the following sports & leisure activities while on holiday, using the scale (1-5) where 1=not interesting and 5=very interesting How interesting do you find the following activities while on holiday?

Answer Options	1	2	3	4	5	Response Count
a) Cycling	344	103	126	82	45	700
b) Diving	435	92	86	72	30	715
c) Hiking	262	105	136	131	141	775
d) Golf	407	89	93	75	49	713

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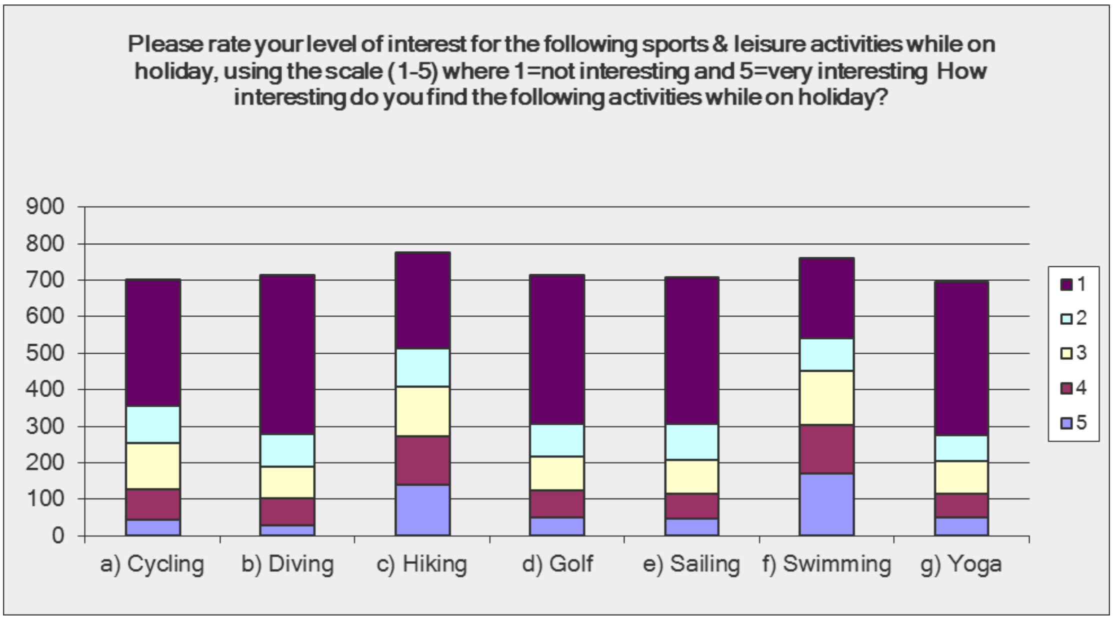
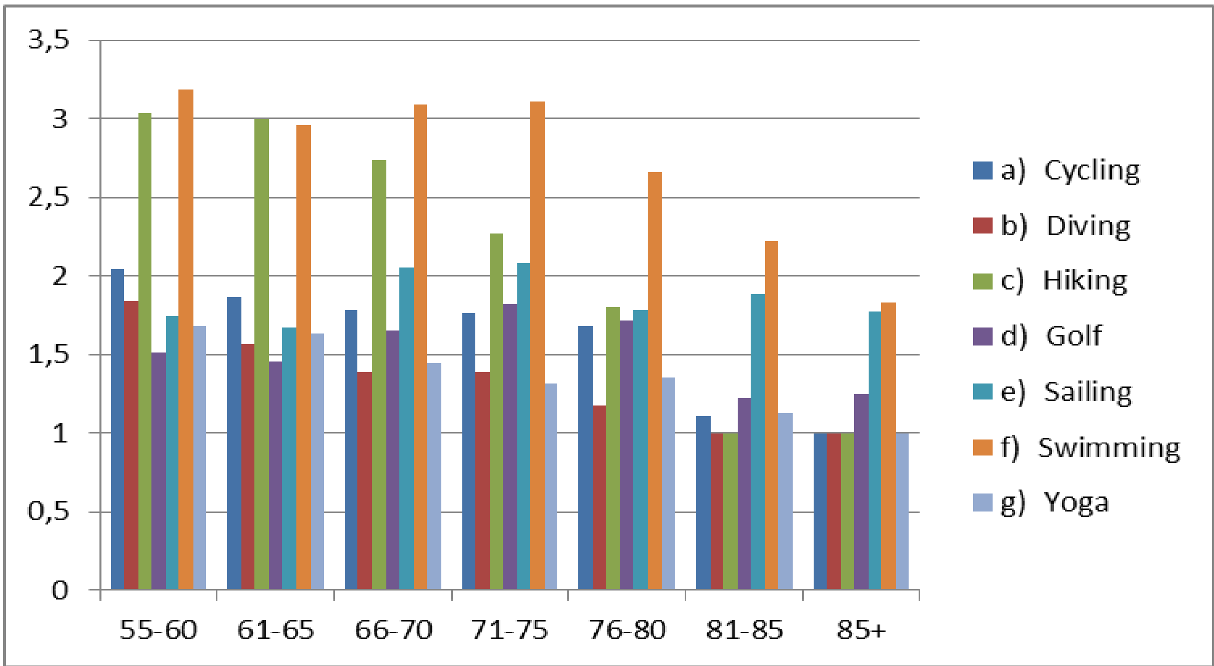
e) Sailing	401	100	93	67	47	708
f) Swimming	220	89	147	133	171	760
g) Yoga	419	72	88	67	49	695
h) Other (please specify)	26	38	50	36	82	232
					answered question	5298
					skipped question	80



When considering the eventual impact of age in the various choices, hiking and swimming are confirmed as the most preferred activities by the respondents aged 55-70. Hiking is still a loved sport among people aged 71-80, but in that age range the importance of sailing and golf improves, till the point when beyond 81 sailing and golf are even more important than hiking.



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Issues affecting choices

On the importance of specific factors, driving the choice of the holiday destinations, it emerged that the highest preferences are given respectively to:

1. The clean natural and cultural heritage sites.
2. The easy access to natural and cultural heritage site.
3. The affordable cost of the natural and cultural heritage sites.

Moreover, when combining ranking no. 4 and 5, it can be highlighted that the respondents pay attention to the provision of toilets and benches/chairs for resting if needed.

In line with the replies gathered via question no. 16, the category of sports and leisure was not so popular, being rated as not very important by the majority of respondents, in particular with regard to the variety of sports offered, the working time of the facilities, the access to facilities, the variety of sports events and the costs of sports and leisure activities.

Also when considering the means and standard deviations, the relevance of “nature and culture” is clearly confirmed (see Q16). The five most important factors are related with this theme: clean natural and cultural heritage sites (4,5), easy access to natural and cultural heritage sites (4,3), affordable cost of the natural and cultural heritage sites (4,3), provision of toilets and benches/chairs for resting (4,2) and the variety of cultural events (4,2). All other factors reach a mean evaluation of 4,0 or lower.

Conversely, the smaller importance of sports and leisure is also confirmed. The only activities who receive an evaluation below 3,0 are related to this theme: the variety of sports events (2,7), the variety of sports offered (2,7) and the working hours of sport & leisure facilities (2,8).

Q18. Please rate the importance of the following factors when choosing your holiday destination, using the scale (1-5), where 1=not important and 5=very important

Answer Options	1	2	3	4	5	Total
a) Natural and cultural heritage tourism: Clean natural and cultural heritage sites	7	9	59	199	490	764
b) Natural and cultural heritage tourism: Working hours of natural and cultural heritage sites	49	53	137	241	262	742
c) Natural and cultural heritage tourism: Use and availability of audio-visual media on-site	94	90	176	158	209	727
d) Natural and cultural heritage tourism: Guide services	37	55	164	214	275	745

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e) Natural and cultural heritage tourism: Easy Access to natural and cultural heritage sites	17	23	84	213	406	743
f) Natural and cultural heritage tourism: Provision of toilets and benches/chairs for resting if needed	29	32	87	218	381	747
g) Natural and cultural heritage tourism: Variety of cultural events	14	31	121	234	342	742
h) Affordable cost of the natural and cultural heritage sites	19	17	90	215	391	732
i) Sport & Leisure tourism: Variety of sports offered	196	107	137	173	75	688
j) Sport & Leisure tourism: Working hours of sport & leisure facilities	179	107	145	185	70	686
k) Sport & Leisure tourism: Access to facilities	162	95	141	197	108	703
l) Sport & Leisure tourism: Variety of sports events	196	108	143	161	78	686
m) Sport & Leisure tourism: Affordable cost of activities	151	70	114	170	163	668
n) Eno-gastronomy tourism: Variety of eno-gastronomy events	49	57	161	278	170	715
o) Eno-gastronomy tourism: Quality of offered activities	42	33	134	254	258	721
p) Eno-gastronomy tourism: Access to the activities	43	40	169	265	192	709
q) Eno-gastronomy tourism: Affordable cost of activities	40	28	115	246	290	719
r) Spiritual and religious tourism: Cleanliness of places (e.g. churches)	45	56	118	214	269	702
s) Spiritual and religious tourism: Visiting/Working hours	50	62	153	236	201	702
t) Spiritual and religious tourism: Guide services	59	71	171	204	189	694
u) Spiritual and religious tourism: Ease of access to sites	46	55	132	234	226	693
v) Spiritual and religious tourism: Variety of spiritual/religious events	74	95	168	190	167	694
w) Health and well-being tourism: Quality of services offered by specialised personnel (e.g. masseurs)	65	55	144	232	220	716

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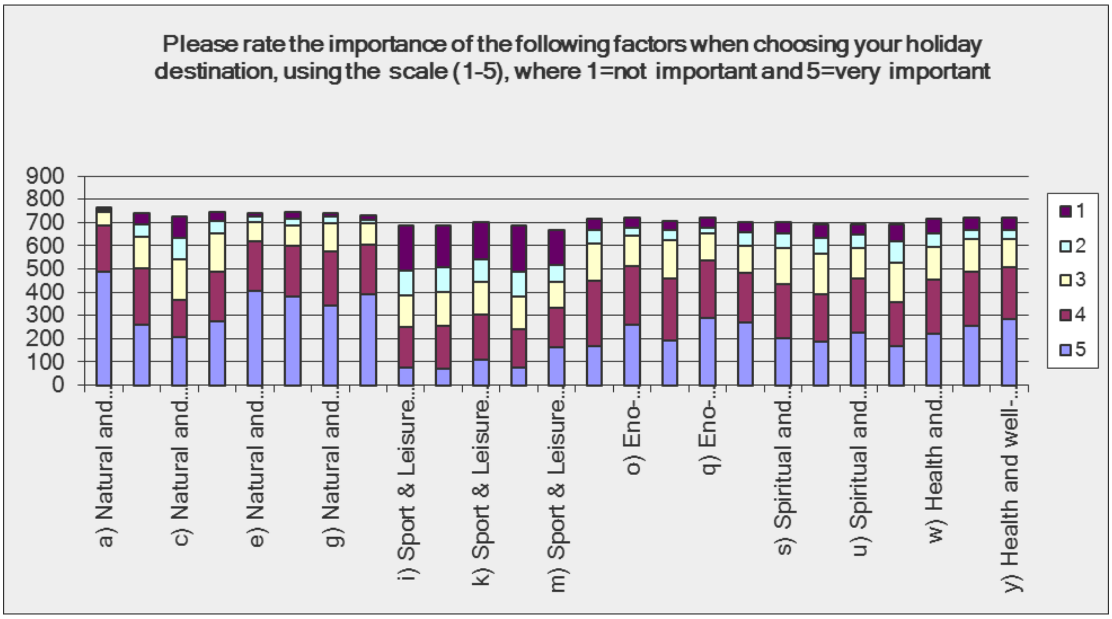
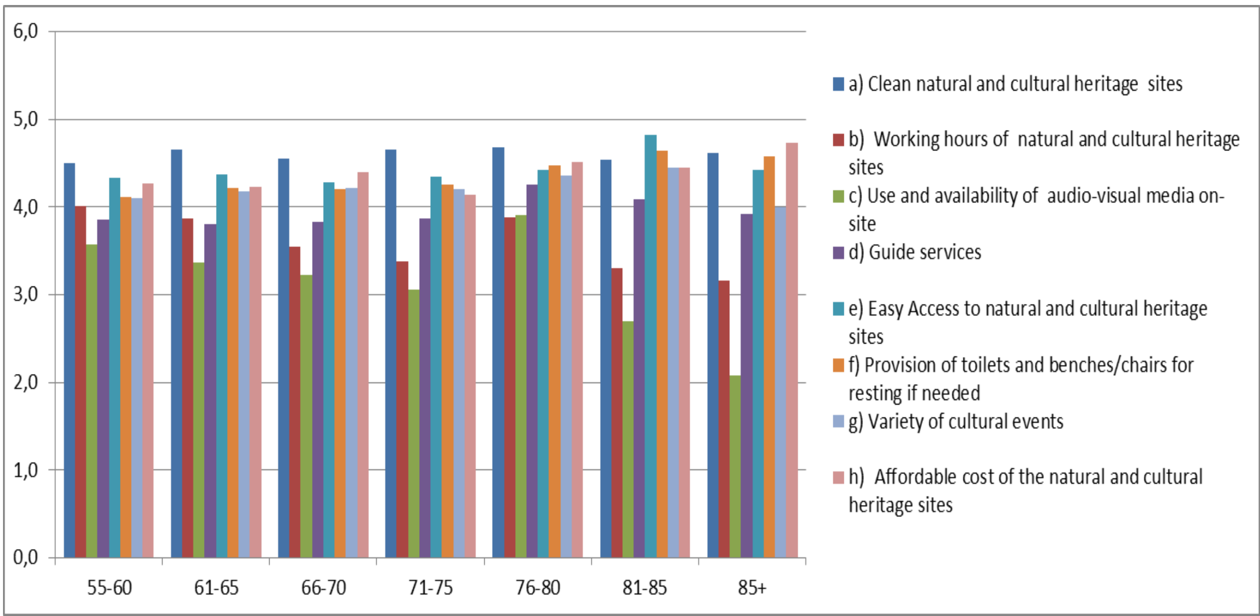
x) Health and well-being tourism: Quality of facilities and services	49	43	139	233	255	719
y) Health and well-being tourism: Affordable cost of services	55	35	122	223	286	721
z) Other (please specify)					2	2
				answered question	17880	
				skipped question	46	



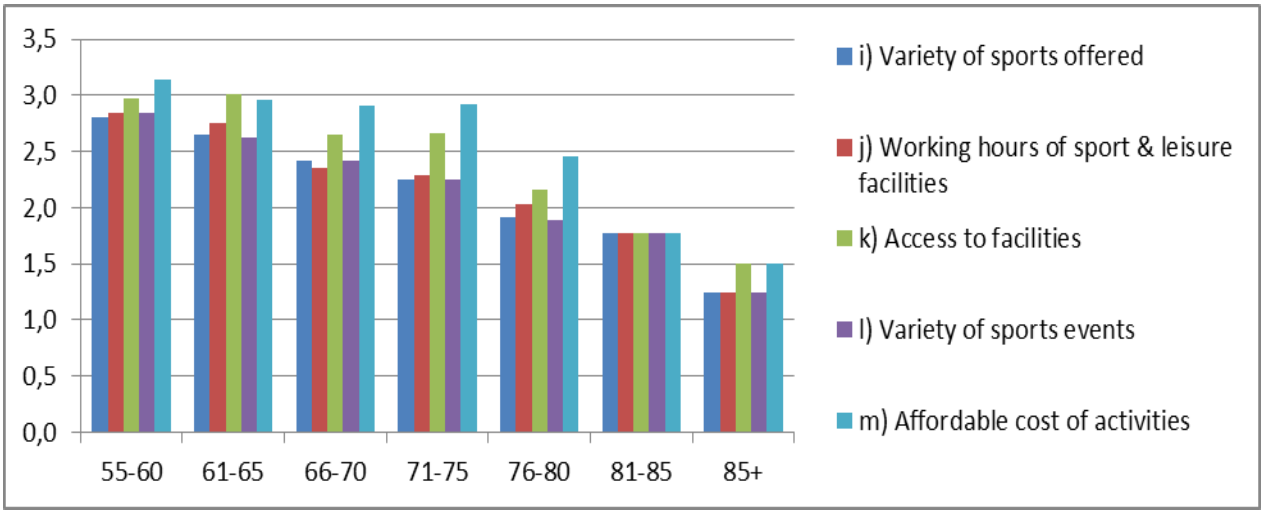
For an overview of the various choices on the ground of age, here follow various snapshots divided by macro-activities.

– <u>Natural and cultural heritage</u>: cleanness of sites and easy access to the site are important aspects across all ages, together with the provision of toilets and benching for resting, which even increases in the ranking as the age rises, as well as the importance given to the affordability of the sites. In the opposite direction, the

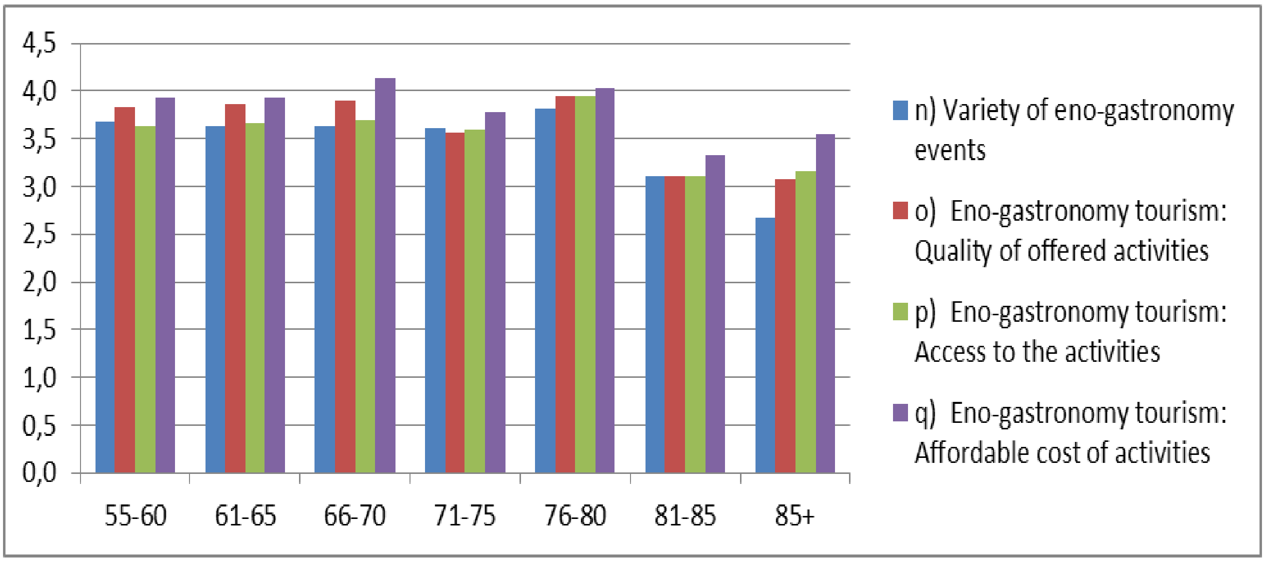


working hours of the sites and the use of audio-visual media on site decline as age rises.

– Sport and leisure activities: all items pertaining to sports and leisure activities have not been rated as very popular, and their importance tends to decline with the progression of age. In particular affordability issues related to sports and the access to facilities decrease in importance as far as the age of the respondents rises.



– Eno-gastronomy tourism: alongside with sports, this category has been averagely rated by the respondents. It can be noted that the importance of the access to activities increase until the age of 80 to decline afterwards. Affordability issues are particularly relevant for the cohorts younger than 80, as it happens for the variety of events, the quality and the access of activities. Generally speaking all the various categories become less and less relevant as age raises.



– Spiritual and religious tourism: with the raise of the age also the importance attributed to the various aspects of spiritual and religious tourism grows. Here it is an overview.

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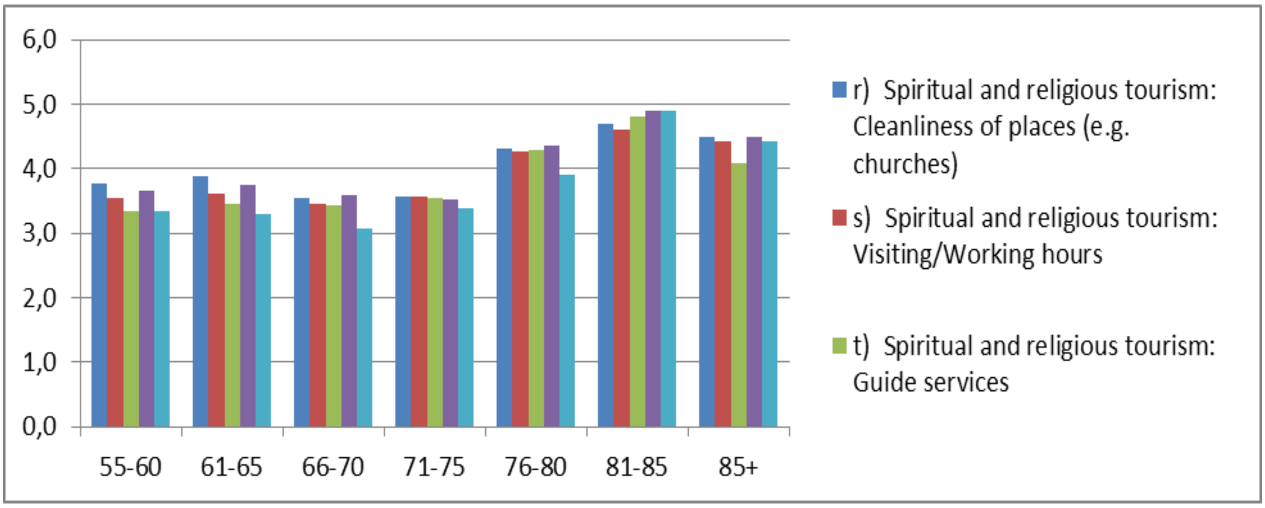
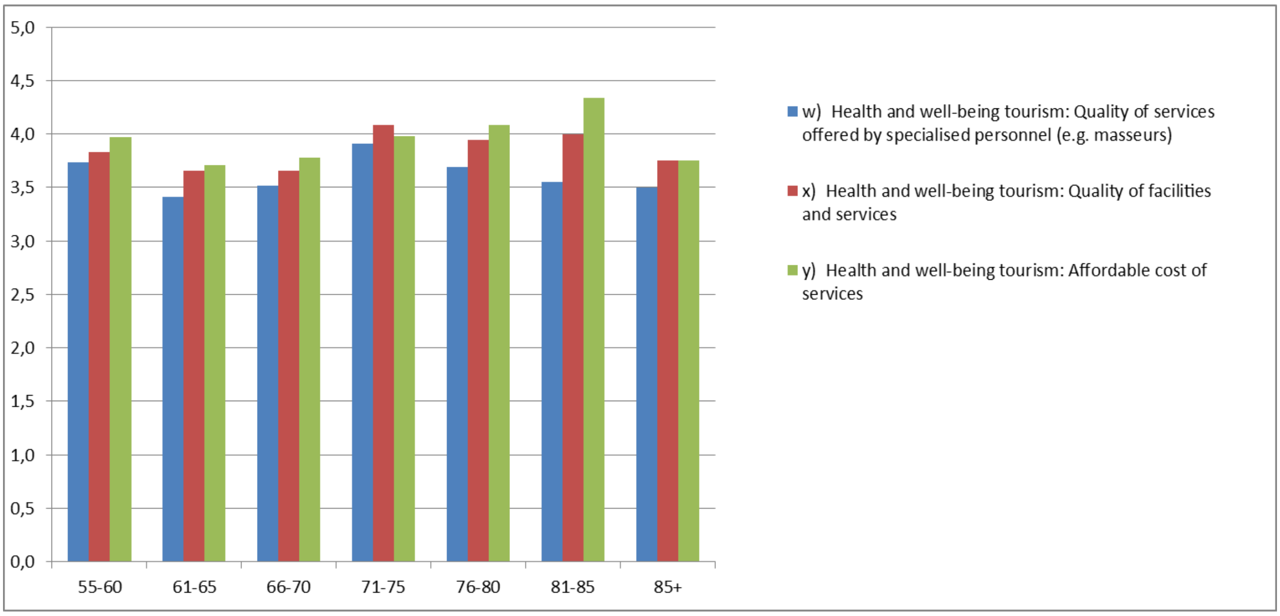


– Health and wellbeing tourism: for this last category it seems that the importance of the presence of specialised staff on well-being rather declines with ageing, while the attention to the affordability of the services increases with the years passing.



General touristic infrastructures

When asked to rate the importance of rather general factors and tourism infrastructures, the majority of the replies opted for:

- The natural environment
- Security
- The local culture

The hotel accommodation and cleanliness follow immediately in the ranking of the most important items, followed by the provision of local transportation, easy access and healthcare and medical services.

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At the bottom of the ranking, very little importance was given to the cottage accommodation, and especially to camping. Just above these categories, the opportunities for socialisation, the support of guides and the telecom service and the quality of airport service stand. Averagely important is the provision of direct flights to/from destination country.

When having a look to the means and the standard deviations' coefficients, security is considered as the most important (4,6), followed by natural environment (4,5), cleanliness (4,5), local culture (4,4) and hotel accommodation (4,4). Several other factors receive an evaluation above 4,0, suggesting that the set of factors considered by the respondents as important is vast, probably with a complex set of influences intertwining them.

Q19. Please rate the importance of the following issues: General factors and tourism infrastructure (1=not important and 5=very important)						
Answer Options	**1**	**2**	**3**	**4**	**5**	**Response Count**
a) Cuisine	23	24	121	298	333	799
b) Natural environment	4	7	50	231	517	809
c) Local culture	9	9	75	265	455	813
d) Hotel accommodation	18	5	72	270	439	804
e) Cottage accommodation	110	61	126	217	249	763
f) Camping	360	80	60	118	142	760
g) Security	8	9	45	189	539	790
h) Cleanliness	6	18	61	178	535	798
i) Availability of direct flights to/from destination country	30	50	148	242	326	796
j) Local transportation (including buses, metros and taxis	11	21	93	278	386	789
k) Easy access (accessibility)	6	22	91	251	406	776
l) Healthcare and medical services	13	22	112	208	437	792
m) Hospitality of natives and "street level experience"	16	17	119	281	361	794

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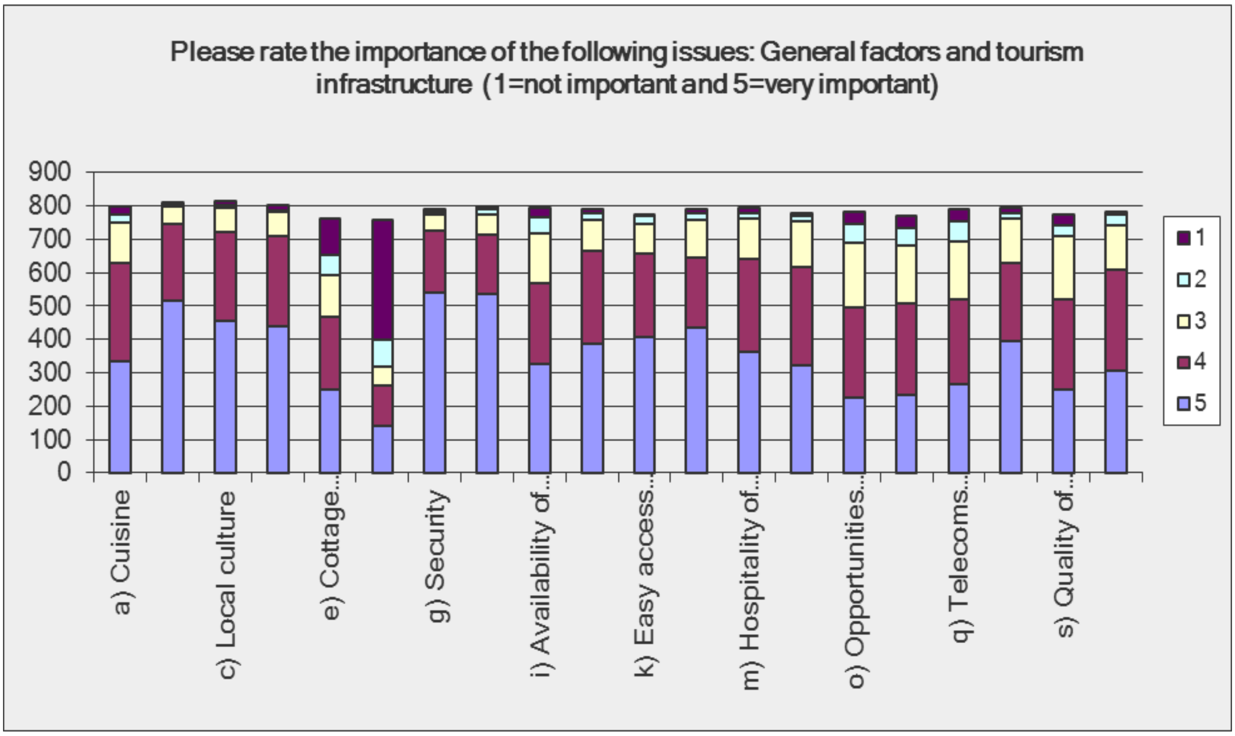
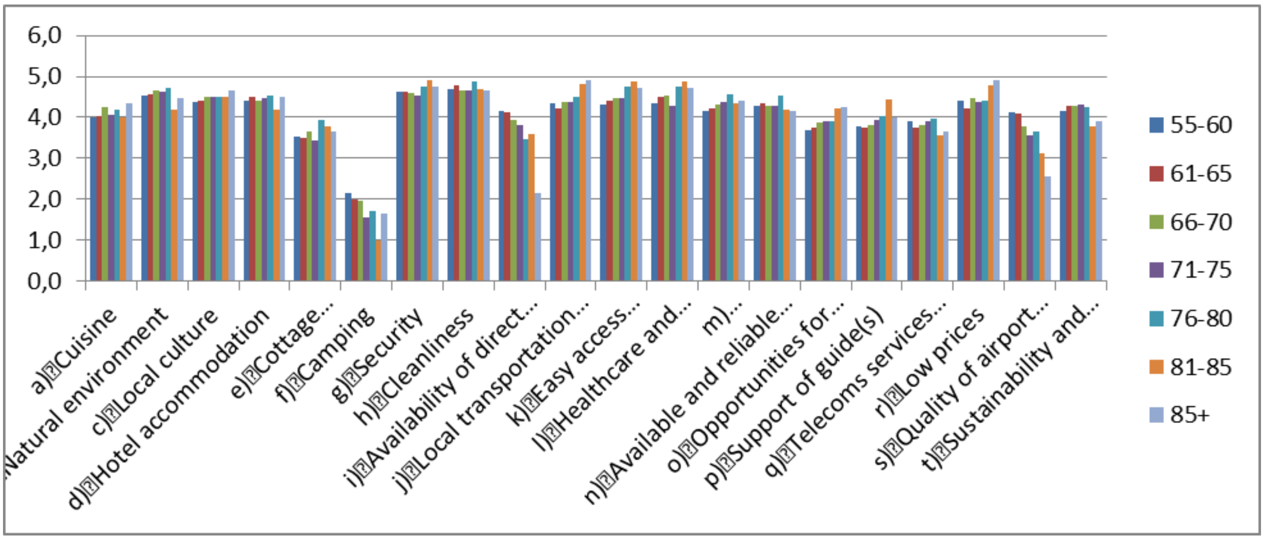
n) Available and reliable tourist information	6	16	140	295	321	778
o) Opportunities for socialization	35	56	195	270	226	782
p) Support of guide(s)	33	55	173	274	234	769
q) Telecoms services including internet	33	61	176	252	267	789
r) Low prices	13	19	132	233	396	793
s) Quality of airport services	31	35	188	271	250	775
t) Sustainability and environmental friendliness	8	31	135	301	307	782
					answered question	15751
					skipped question	59



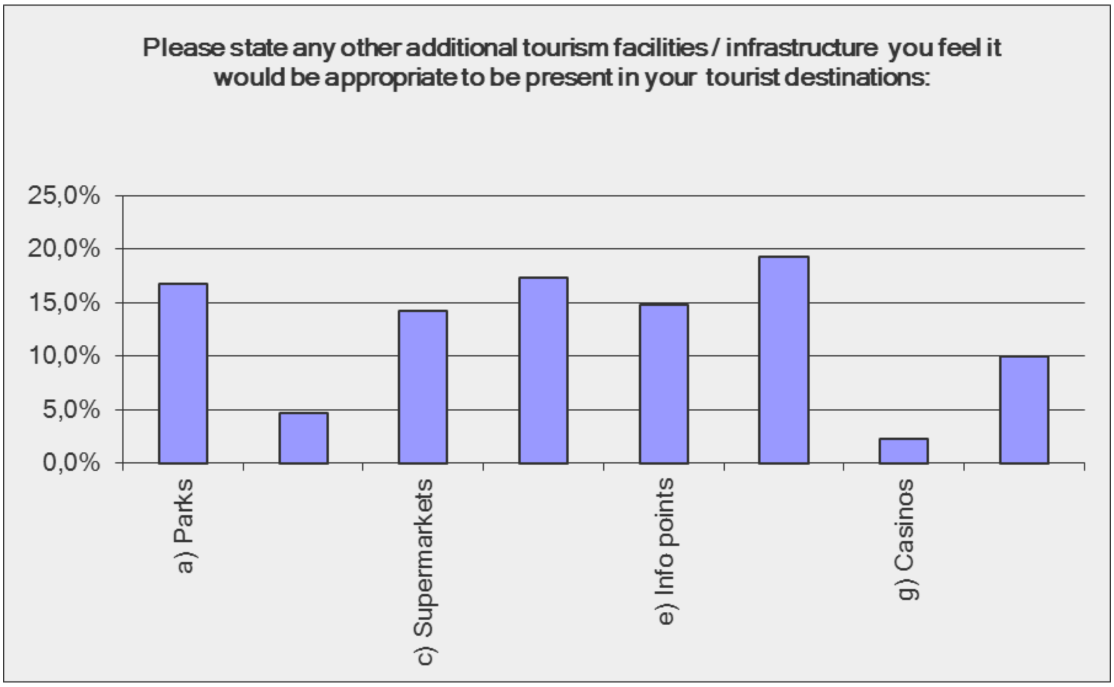
When exploring how such perceptions change with respect to age, it can be noted that local transportation, accessibility issues, health care and medical services, and low prices are categories whose importance tends to increase while ageing. On the contrary, camping services and the quality of airport services are items considered less and less important while the years pass.



When looking to any other additional tourism facilities and infrastructures that older tourists would appreciate being offered, the most chosen option was "toilets" (19.2%), followed by pharmacies (17.2%) and parks (16.7%). Casinos and marinas were not considered relevant by our sample.

Among interesting "other" options were playgrounds for children and museums.

Q20. Please state any other additional tourism facilities / infrastructure you feel it would be appropriate to be present in your tourist destinations:		
Answer Options	Response Percent	Response Count
a) Parks	16,7%	407
b) Marinas	4,6%	112
c) Supermarkets	14,2%	344
d) Pharmacies	17,2%	419
e) Info points	14,8%	360
f) Toilets	19,2%	467
g) Casinos	2,3%	55
h) Thematic experiences (e.g. in agro-tourism)	10,0%	242
h) Other (please specify)		24
	answered question	2430
	skipped question	74


Please state any other additional tourism facilities / infrastructure you feel it would be appropriate to be present in your tourist destinations:
25,0%
20,0%
15,0%
10,0%
5,0%
0,0%
a) Parks
c) Supermarkets
e) Info points
g) Casinos

Main findings

Older tourists are a very heterogeneous group, with needs and expectations very diversified, in relation to age, health conditions, social and familiar constraints (e.g. care duties) and economic status. Nevertheless our questionnaire allowed us to highlight some common patterns and preferences, especially concerning the age range 55-75.

Needs and expectations

No matter of their countries of origin or residence, or their education, the majority of the interviewed older tourists like to travel with a partner, with relatives or family members, as well as in groups with people they know.

They also appreciate to enjoy holidays with a budget up to 100€ a day, and prefer to take 4-7 nights breaks (42%), when possible, and also to extend the length up to 13 nights (33%).

With respect to seasonality, they prefer to travel in summer and spring and tend to be quite autonomous in planning and managing their travels, opting less frequently for all-inclusive packages, preferring to organise their holidays individually.

Relatives, friends and the internet seem to be reliable sources of information that tourists aged 55+ privilege when choosing their destinations. With regard to the preferred means of transport, it is the plane to be ranked in the number 1 position (40%), followed by the car (26%). Interesting enough, the provision of services in the airport was not considered a priority though.

Furthermore, seniors are open to travelling both abroad (51%) and within their own countries (42%), they don't expect to spend a lot of money, neither of time, no matter if retired or not.

When asked to rate the importance of themes, topics and activities, "nature and culture" are the preferred touristic themes, and our sample considers very important to have clean and easy accessible natural and cultural heritage site, as well as affordable ones. The natural environment is indeed very important, alongside with the local culture. Security and comfortable and clean accommodations are also relevant general factors having an impact in the choices of senior travellers.

Tourists aged 55+ have undoubtedly different expectations when travelling: the personal preferences and tastes also matters. Nevertheless it is possible to state that seniors appreciate and require security, clean and reliable sites and services, and better value for money, as well as they would like also to be ensured that toilets, pharmacies and supermarkets are available infrastructures in their tourist destinations.

The questionnaire did not investigate the major barriers to travel in older age, which are normally of financial nature and related to health-problems or care duties. Indeed this was a limit of this investigation tool: if on the one hand side, the need to restrain the questionnaire to about 20 questions made it rather popular and easy accessible for completion, on the other hand side, however, it prevented probably the consortium to investigate motivations for not travelling and hindering conditions, which would have complemented the more general picture. A choice was needed and it was decided to focus the questionnaire on the motivations and on the travelling methodologies, in order to derive possible expectations during the analysis' stage. The literature analysis which

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follows, however, sheds some lights on barriers to movements and older people's concerns when travelling.

Country-based insights

When having a look to some differences among Countries of residence, it was possible to note that:

- The majority of **Bulgarian people** belonged to a rather young cohort (aged 55-60) and are not retired (differently from the respondents from other countries); they prefer to travel by car (36%) and by bike (38%), rather than by plan, as reported in the questionnaires received by other countries.
  They also tended to rate as important (score 4) all of the themes presented in Q16, stating that also sport and leisure and spiritual, as well as religious aspects matters to them. These latter categories were not particularly popular among the replies gathered from other countries. Such a trend (the fact of considering important all choices provided) was also confirmed in Q18, where all replies were rated as important (score 4) in average.
  Furthermore Bulgarian respondents considered as important (again score 4) all the various factors listed in Q19. Last, with regard to Q20, they confirmed the general trend, which sees parks, supermarkets and info points as the most wished tourist facilities also for the Bulgarians, although they did not listed pharmacists among the top 3 choices.
- The majority of **French respondents** were on the other hand full-time retired and aged from 55 to 70. They prefer to travel by car and plane, confirming the general trend, as well as for their interest in sports and leisure activities while on holiday (Q17), except for hiking, rated as important (score 4) by the French, while it is not particularly relevant among the average replies gathered from other countries. Besides this, no other significant deviations could be reported from a country-specific perspective.
- Interesting preferences pertain to the sport activities while on holiday and their relation with the country of residence. It was possible to note that Italians rated as important swimming and sailing, which in average did not gather a high score; Similarly echoed some replies from Greeks and Cypriots, although for these latter respondents the trend is counter balanced by a consistent number of score 1 for both categories, so all-in-all it cannot be considered as much relevant for them.
- No specific trends emerged with regard to spiritual and religious activities, health and well-being and eno-gastronomic themes across the various countries. Compared to natural and cultural issues, such activities are considered as less important in average. In that regard, however, it can be noted that the Portuguese respondents made registered a more consistent number of positive replies (scores 4 and 5) in these less voted categories, compared to other countries.
- Last, on the preferred modes of transport, it is interesting to underline that **Portuguese people** included also the bus, besides the plane and the car, as a means to use on holiday. Likewise the train and the bus both appear in the replies of Italians, while the Greek and Cypriot people considered the boat, as well, which was not among the most recurrent choices in the other replies.

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Complementary comments

Besides this analysis, AGE Platform Europe gathered some other interesting insights from some of its members, complementing the width and the depth of the study. In particular, the following notes are worth being reported.

- Specifically on **security**, additional comments reinforced the aspect of accessibility and web-accessibility. There should be much more awareness for rules which matters accessibility, to the benefit of all generations, and especially of those suffering from any temporary or permanent disability. Security goes beyond the protection against pick-pockets, and airport security, and encompasses essential accessibility issues, both of the physical environment (entrances, accessible and open toilets, accessible lifts, accessible inter-modality,…) and the virtual one (accessible websites, available phone numbers of basic services for tourists, …).
- With particular regard to health **safety**, a comment targeted the controls on legionella. This shows that the attention of older tourists towards health related issues, and the need to go beyond the provision of pharmacies and the availability of doctors. Food safety cannot be neglected and more awareness must be raised.
- **Insurances** and premiums costs must also be considered. In some countries (the specific example came from the UK, but the situation is common across Europe) those costs are exorbitant and discrimination on the ground of age is a concrete risk. Action is needed to cope with such an issue, especially in the light of the elaboration of new and tailored tourist packages for senior tourists.[4]
- Despite the 38% of older tourists travel with their partner, and 28% of the respondents travel with relatives and family members, about 20% travel in groups. In practice, the majority of offers are meant for 2 persons sharing one room, resulting in an extra cost when opting for single rooms. Tour operators could be more aware of the fact that some older people may prefer a single room (for health reasons, for practical reasons …) and could consider some offers for people who prefer a single room.

On a closing note, the ESCAPE questionnaire asked also which countries have been visited last and which ones are among the next destinations of our respondent.

With regard to the first question, Greece is on top of the last visited destinations (above 90 replies), followed by Spain (79) and Italy (53 replies). Outside the European Union, African destinations and Latin American countries were particularly appreciated.

As far as the next countries to be visited are concerned, again it is Greece (84) to be the queen of destinations, followed by Italy (68), the UK (48), France (46) and Spain (44) in the top ranking. These countries are then followed by Latin American countries (Brazil above all) and Portugal (30 replies), the USA (27), Germany (25) and Bulgaria (22), Turkey (12), Switzerland (11) and Cyprus (10).

[4] AGE Platform Europe delivered a background note for a European Parliament Hearing "Unblocking the Anti-Discrimination Directive" on age-discrimination in access to financial services. Various examples of age limits and differentiated premiums in travel insurances are listed. The report is available online: http://www.age-platform.eu/images/stories/Background_document_anti-discrimination_directive_AGE.pdf

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Interesting insights and comparisons from other studies

Differences across generations

Various studies[5] confirm the trends and analysis reported in this deliverables. Taking a broader perspective, so to encompass **intergenerational comparisons**, it is interesting to read the results of this present work with the statistics and analysis that took into account the preferences of younger cohorts, as it is the case in the Eurobarometer study[6] on the preferences of Europeans towards tourism (2014).

As a matter of fact, the report highlights that older respondents are more likely to go on holiday in their country: "54% of people aged 55 and over plan to do this, compared with only 38% of 15-24 year old".

According to the Eurobarometer, "age seems to influence the **reasons to go on holiday**. Respondents aged 55 and over are more likely to mention nature (35%) as their main reason, compared with 15-24 year-olds (21%). Conversely, they are the least likely to go on holiday for the sun/beach (36% vs. 48%-53% for the other age groups). Younger respondents are the most likely to have gone on holiday to visit family/friends (38% of 15-24 year-olds and 40% of the 25-39 age group vs. 30% of 40-54 year olds and 33% of people aged 55 and over).

What follows here are other extracts from the Eurobarometer survey, suitable to raise further points of comparison and discussion around touristic preferences and ageing:

- the younger respondents are more likely to regard recommendations from friends, colleagues or relatives as important: 67% of 15-24 year-olds mention this, compared to 44% of those aged 55 and over. Unsurprisingly, the youngest respondents are also the most likely to mention social media sites (15% vs. 3% of people aged 55 and over). Respondents aged 55 and over are much less likely than younger respondents to mention Internet websites (28% vs. 52%-59% for other age groups), but are the most likely to mention tourism offices/travel agencies (22% vs. 16% of 25-39 year-olds).
- Respondents aged 15-24 and 55 and over (both 31%) were the most likely to have been on an all-inclusive holiday in 2013, while 25-39 year-olds (23%) were the least likely to have done so. Additionally, 15-24 year-olds were the most likely to have gone on a holiday where the services were purchased separately, whereas people aged 55 and over were the least likely (45% vs. 35%).
- People aged 55 and over (32%) are the most likely to have taken a holiday lasting more than 13 consecutive nights, with 25-39 year-olds (23%) the least likely to have done so. Conversely, 15-24 year-olds (53%) are the most likely to have taken a short-stay trip (up to three nights), while respondents aged 55 and over (44%) are the least likely to have done so.
- People aged 25-54 (63%) are the most likely to cite financial reasons, while those aged 15-24 (45%) are, surprisingly, the least likely to do so. 15-24 year-olds are the most likely to say they lacked the time (31% vs. 6% of people aged 55 and over), while the latter are the most inclined to mention personal/private reasons (39% vs. 16% of 15-24 year-olds).

[5] Cf. Bibliography
[6] Flash Eurobarometer 392- Preferences of Europeans towards tourism, report, February 2014

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- Respondents under the age of 25 are more likely to plan holidays lasting 4-13 nights (50% for 15-24 year-olds) than people aged 55 and over (34%). Similarly, people aged 55 and over are less likely to plan short-stay trips than other age groups (24% vs. 34-40%).

Additional patterns on senior tourism in Europe

About **seasonality**, it is interesting to mention a part of the study, carried out by the European Commission, DG Enterprise and Industry, on the economic impact and travel patterns of accessible tourism in Europe[7]. The report refers to people aged 65 and above only and states that this group in Sweden, Belgium and the UK is "less likely than average to travel over the summer holidays. In contrast, Swedish seniors are more likely to travel during the spring holidays, UK seniors over the winter holidays, and Belgian seniors off-season. In terms of most likely period for a holiday, three countries stand out for seniors: people aged 65 and over Belgian seniors are less likely than average to have stayed with family or friends in the past 12 months but more likely to have stayed in a rental house or flat, or in a spa or wellness resort."

On other, cross-cutting issues, such as **activities on holidays, shopping opportunities and barriers to tourism**, the report refers that:

- Seniors in the UK are more likely than average to use hotels or bed & breakfasts. Swedish seniors are more likely than average to have used a boat, ship or ferry to go to their destination or come back from it.
- Having a look to leisure activities while on holiday, "Swedish seniors are less likely than average to mention the following activities: sightseeing/walking around, natural visits, hiking/running, guided tours and shopping. Belgian seniors are less likely to mention natural visits and local events, and UK seniors hiking or running".
- With regard to the relationship with **travel agencies**, Swedish seniors are less likely than average to use a travel agency as their most important information source when preparing a trip, but more likely to use social media or their own experience. UK seniors are also more likely to rely on their own experience. In parallel, Swedish seniors are less likely to book their trips in person through a travel agency. UK seniors are more likely to say that booking through an institution or group does not apply to them and less likely than average to mention booking in person through someone they know.
- Looking into the importance of various items, "**shopping opportunities** are more important than average for Belgian and UK seniors. In contrast, Belgian seniors find the availability of services in a **language** you understand less important and UK seniors find the following items less important than average: health treatments, accessible tourist accommodation, and destination adapted to a specific group of people. No significant differences appear in terms of satisfaction with these items".
- Turning to **barriers**, "Belgian seniors are less likely than average to mention experiencing barriers with the following items: nature, how tourists are treated, general value for money, local culture and people, transport once at destination, and accessible locations. UK seniors are less likely to mention barriers with the

[7] European Commission, DG Enterprise and Industry, "Economic impact and travel patterns of accessible tourism in Europe" – final report, Service Contract SI2.ACPROCE052481700

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general value for money of the destination, information available before the trip, and the availability of information about accessible services".

- In terms of the importance of **building-related items**, "Belgian seniors find accessible parking spaces, mobility within the building and the ease of use of lifts more important than average. UK seniors are more satisfied than average with accessible toilet and bathroom facilities".
- With regard to the **accessibility issues and modes of transportation**, when asked which items could help on their trips, "Slovenian seniors are more likely than average to mention help to get on board, leave or change transport type induction loops, areas or equipment for children and menus for special dietary needs. Both Slovenian and Lithuanian seniors mention medical help more often, while Lithuanian seniors are also more likely to mention activities for specific groups of people. Irish, Lithuanian, Dutch and UK seniors are more likely than average to mention a wheelchair or scooter. UK seniors are also more likely to mention walkers, crutches or sticks, or induction loops. Belgian and Swedish seniors are more likely than average to select the 'None of these' option at this question. Belgian seniors who were satisfied with the accessibility of locations during their most recent trip give a below average score to their likelihood of going back to the same destination in future".

AGE Platform Europe's feedback allows complementing this latter point on accessibility, thanks to a set of consultations[8] and working groups' discussions run with older people's organisations around Europe.
Accessibility means to have access, on an equal basis with others, to the physical environment, transportation, information and communications technologies and systems (ICT), and other facilities and services in line with the UN Convention on the Rights of Person with Disabilities. European travelers and consumers face barriers to the free movement of accessible goods and services, especially due to poor regulation and/or implementation, and to differing individual initiatives of Member States when defining their own standards and regulating their own markets. This results in a general fragmentation that is less productive, less attractive for industry and less performing for the citizens and customers, especially when travelling across Europe.

- In some countries the main concerns relate to the lack of **accessibility of the public space and the built environment**. Public transport and inter-modality are among the major issues of concern, as seen above (difficulties in getting on board, safety in public transport, lack of help and assistance, ect.).

  Furthermore, despite the progresses in the field, public spaces' accessibility is still to be improved: bus or railway stations can be considered accessible in technical terms, but not in the practical ones, if the only lift available is not maintained properly or the public toilet is out of order.

  The build environment and its connection with transport modes and public spaces demands greater accessibility: the implementation of the concepts of design-for-all

[8] Accessibility Act : AGE contribution to the consultation, http://www.age-platform.eu/lastest-news-en-gb-6-1-2-3-4-5-6/1459-accessibility-act-age-contribution-to-the-consultation

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and age-friendly environments[9] in practice is a concrete way for greater accessibility, inclusiveness and an improved quality of life, tourism included.

- It is also very important to take into account the need for **seamless provision of services**. This concept is usually applied in the transport sector, meaning that door-to-door travel (including the timely provision of reliable information before and during the journey, information and assistance at stop-overs, etc.) should be made accessible. Alongside travels, seamless services should apply in other areas: having accessible lifts inside the building is very important for people with reduced mobility (PRM), but the continuity with outdoor spaces and neighbourhood facilities should be considered otherwise having an accessible lift will not improve the ability of PRMs to enjoy their right to free movement and to participate in society.

Ageless consumers' concerns

Last but not least, it might be relevant to highlight here some findings coming from consumers' and older people's organisation. It is of particular interest a report on European cross-border travel and tourism, gathering the learning from consumers' experiences and complains. The report, issued by ANEC - the European Consumer Voice in Standardisation, analyses some key areas where consumers of all ages are dissatisfied and experiencing problems. Such a contribution is complemented by AGE Platform Europe's work on age-friendly environments and on age discrimination in the access to the market and the financial sectors. In the light of the present work, and especially in the elaboration of the touristic packages coming next from ESCAPE, the following issues seem particularly important:

- ANEC reports 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". Considering that 26% of our respondents opted for the car when choosing a transport mean for their holidays, this comment is worth being underlined.[10]
- **Language** barriers makes communication difficult, states again ANEC: "in many cases problems relates to 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". The ESCAPE questionnaire did not go that far to investigate this issue; however language barriers may be a concrete hindrance for travellers, especially the older ones, which should not be neglected.
- Increased use of **review sites**: the ANEC report 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

[9] For more information on Design-for-All and Age-Friendly Environments: http://www.age-platform.eu/age-work/age-policy-work/accessibility and http://www.age-platform.eu/age-work/age-policy-work/age-friendly-environments/age-work/2322-afe-innovnet-join-our-growing-community-on-age-friendly-environments

[10] Besides, barriers to car rentals came up quite strongly also in AGE Platform Europe's General Assembly, in December 2014. For instance, people over 70 are not allowed to rent a car, even if they have a valid driving license; this is an age-specific concern.

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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, therefore it is important to pay attention to the way that they are set up and managed. "There is the potential for consumers and service providers to abuse the system with inaccurate or misleading information". Therefore it is relevant to keep in mind the organisation and management of those sites, among the other issues related to the provision of tourist services.

- 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".
- **Low awareness of consumer rights**: this 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 the report's 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".

Besides ANEC work on cross-border travel, AGE Platform Europe's activism against discrimination of the ground of age offers additional remarks to the barriers of movements within the EU faced by older citizens.

- AGE has identified a number of products "where upper age limits or denial apply, on account of the client's age, when asking for a quote for some essential financial products. Moreover, indirect discriminatory conditions such as sharp and disproportionate increases in premiums for people above a certain age, downgraded access to alternative products, reduced coverage, etc., have a negative impact on older people's access to basic services"[11].

  In some Member States "**insurance** companies deny access or charge excessive premiums to older citizens wishing to buy travel insurance to travel to other Member States. When asked to justify these differences of treatment, insurers claim that older people are at a higher risk of needing emergency medical treatment when travelling abroad compared to younger age groups. Within the European Union

[11] AGE Platform Europe, Background document for Hearing "Unblocking the Anti-Discrimination Directive" on age discrimination in access to financial services, March 2012: http://www.age-platform.eu/age-work/age-policy-work/anti-discrimination/age-work/1949-previous-work

however, citizens are free to travel to other Member States and their health costs, if they need emergency medical care when visiting another Member State, are covered through the coordination of statutory health insurance systems between Member States by the country where they are insured. It is therefore unjustified to claim that older people constitute a higher risk for insurance companies when they travel within the European Union".

With the world-wide population ageing, new approaches to insurance are needed. More people are living longer, healthier and more active lives: "refusing them products sends harmful ageist message and places unacceptable restrictions on people's lives"[12].

- Another important aspect that cannot be neglected is the **payment service**. This is an essential commodity for citizens and consumers. Older people, in particular the very old, often prefer traditional payment methods; differences, however, exist from country to country. For example "in France and the UK, cheques have long been the favoured mean to make payments whereas in other countries, such as Belgium or Finland, cash and electronic means of payment have been the main methods of money exchange for years already".
  As our societies become more and more digitalized, older people, like everyone else, wish to adapt to the changes and be able to benefit from what innovative solutions can offer. "Yet, many of them are faced with barriers that prevent them from using card, mobile and e-payments, mainly due to their lack of media literacy and poor ICT skills as well as the lack of accessibility e-payment devices and interfaces".
  Additionally, to ensure security, "some payment systems may require sophisticated passwords which can be hard for older people to remember, or may afford limited time to proceed with the various steps of payment, which is an additional source of stress and concern. Besides, the language used in the banking and ICT sector on the operation of these services is sometimes incomprehensible by older consumers not used to ICT terminology. Concerns over reliability and/or privacy may also deter older people from using e-payments facilities.
  Furthermore, it should not be forgotten that not every consumer has access to electronic means of banking, and some do not even have access to a basic bank account, debit card or credit card"[13].

As a result and not to aggravate the phenomenon of financial and digital exclusion, it is important to ensure that "electronic options do not exclude other modes of payment like bank transfers, cheques, cash payment etc. In a nutshell, a range of payment options should be available, accessible and user-friendly, affordable, efficient and secure and consumers should have the freedom of choice among various alternatives without being penalised".

[12] AGE proposes the development of an intra-EU travel insurance product without age limits using the same tariff as for other age groups (as health-related costs are already covered by the coordination of EU social protection systems) which would also be an interesting market for insurers given that due to the ageing population, older people are a growing section of the customers of insurance companies and there is a real potential for a silver economy in this field.
For further information: AGE Platform Europe, Background document for Hearing "Unblocking the Anti-Discrimination Directive" on age discrimination in access to financial services, March 2012: http://www.age-platform.eu/age-work/age-policy-work/anti-discrimination/age-work/1949-previous-work

[13] More information on "AGE response to the Consultation on Green Paper – Towards an integrated European market for card, internet and mobile payments". More examples can be found in the report, e.g. in the UK and in the Netherlands, a growing number of public and private providers of parking are only accepting payment by cards or mobile phones, with no option for paying by cash. This is a clear and unfair limit which affects especially older travelers.

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Based on feedback received from AGE members in the frame of the consultation on the European Commission Green Paper “Towards an integrated European market for car, internet and mobile payments”, the issue of interchange fees is also worth being highlighted for its relevance to travels:

- “The fees charged to consumers for card usage can vary widely between member states. However, an overarching problem in all members states is the lack of transparency about those fees: sometimes it is unclear to consumers what they are paying for and whether the amount they are being charged is justified and proportionate. In addition, fees like **interchange fees** are currently paid by all consumers no matter which payment method they choose. It is also questionable whether merchants should be allowed to charge consumers for making a payment, since accepting payment for goods and services is clearly an integral part of their business and not something that should be charged to the consumer as an add-on service”.

The relevance for the market and for the evolution of touristic packages is there: getting rid of these barriers (limits in insurances and car rentals, language barriers, review sites’ management, confusion on liability, non-accessible payment and e-payment services, unclear payment and interchange fees, on-line security concerns, etc.) will mean less administrative costs for industry and a larger market (growing number of older consumers).

Standardisation tools and dynamics are part of the process. The development of touristic packages could refer to the adoption of common standards in tourism, which would help mainstream electronic payments, encourage online and cross-border purchases and would enhance consumers’ confidence. Vulnerable consumers should be addressed in standardization procedures, taking into account both aspects of financial inclusion and accessibility. Their needs and priorities should be addressed and the choice of opting out from ICT solution should be considered, accepted and followed-up.

Last but not least, the adoption of a rights-based approach to service provision, in line with the Charter of Fundamental Rights of the European Union (especially with its art. 25 “Rights of the elderly” to dignity and independence in participation to social and cultural life, and art. 38 for high level of “Consumer protection”) is a compelling need and breakthrough, for senior tourism and beyond.

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ANNEX I

ESCAPE QUESTIONNAIRE

(ENGLISH VERSION)

What are your expectations and interests when you travel for holiday? If you are 55+, please take 10 minutes to reply to a few questions!

This quick questionnaire has been set up by the ESCAPE consortium with the goal of identifying the needs, expectations and interests of 55+ citizens in relation to the tourism/travel sector.

The results of this questionnaire will enable to build the most relevant tourism packages for European 55+ citizens.

We thank you in advance for your time and please do not hesitate to contact ilenia.gheno@age-platform.eu for any question!

PART A: Demographic Characteristics

1. Are you...

a) ❑ Man

b) ❑ Woman

2. How old are you?

a) ❑ 55-60

b) ❑ 61-65

c) ❑ 66-70

d) ❑ 71-75

e) ❑ 76-80

f) ❑ 81-85

g) ❑ 85+

3. Are you retired?

a) ❑ Yes , full-time

b) ❑ Yes , part-time

c) ❑ No

If yes: how long have you been on retirement? ....

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4. Country of Residence……………………………………………………………………

5. Are you...

a) ❑ Single

b) ❑ Married / in a relationship

c) ❑ Divorced

d) ❑ Widow(er)

6. What is your level of education?

a) ❑ Primary Education (elementary school)

b) ❑ Secondary Education (secondary school)

c) ❑ Tertiary Education (university, post-graduate)

d) ❑ Other – please specify ……………………………………

7. What is your average daily budget while on holidays abroad (excluding air tickets)?

a) ❑ Up to €100 / day

b) ❑ €101 - €300 / day

c) ❑ €301 - €500 / day

d) ❑ €501+

PART B: VISITING FACTORS

8. What is the usual length of your holidays?

a) ❑ 1-3 nights

b) ❑ 4-7 nights

c) ❑ 8-13 nights

d) ❑ 2-3 weeks

e) ❑ More

9. Where do you mostly travel?

a) ❑ Abroad

b) ❑ In home country

c) ❑ In your own country

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10. When do you prefer to travel? (multiple choices allowed)

a) ❑ Spring

b) ❑ Summer

c) ❑ Autumn

d) ❑ Winter

11. When you organize your holiday, do you prefer to:

a) ❑ Arrange only travel & accommodation

b) ❑ Arrange an all-inclusive package (i.e. travel, accommodation, meals and tours)

c) ❑ Other – please specify ……………………………………………

12. How do you usually organize your holiday? (multiple choices allowed)

a) ❑ I organize it individually

b) ❑ I rely on a travel agency

c) ❑ I rely on organisations (older people's organisations, parish associations, …)

13. What are your main sources of information when choosing your holiday destination?(multiple choices allowed)

a) ❑ Relatives and friends

b) ❑ Internet

c) ❑ Social media

d) ❑ Travel Agencies

e) ❑ Guidebooks and magazines

f) ❑ Older people associations, parish organisations

g) ❑ Other – please specify ……………………………………………………

14. When on holiday, do you travel:

a) ❑ Alone

b) ❑ With a partner

c) ❑ With relatives / family

d) ❑ With grand-children

e) ❑ In group, with people I know

f) ❑ In group, with people I have not met before

g) ❑ Other: …………………………………………………………………………

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15. Do you prefer to travel by

a) ❑ Plane

b) ❑ Boat

c) ❑ Train

d) ❑ Bus

e) ❑ Car

f) ❑ Bike

g) ❑ Other – please specify ……………………………………………..

16. Please rate the importance of the following themes when choosing your holiday destination, using the scale (1-5), where 1=not important and 5=very important

Special Interest Tourism Themes	How important are these themes for you when choosing your holiday destination?				
a) **Nature & Culture**	1	2	3	4	5
b) **Sports & Leisure**	1	2	3	4	5
c) **Eno-gastronomy**	1	2	3	4	5
d) **Spiritual/Religion**	1	2	3	4	5
e) **Health and wellbeing**	1	2	3	4	5

f) Other: please specify……………………………………….

17. Please rate your level of interest for the following sports & leisure activities while on holiday, using the scale (1-5) where 1=not interesting and 5=very interesting

Sports & Leisure Activity	How interesting do you find the following activities while on holiday?				
	1	2	3	4	5

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a) Cycling	1	2	3	4	5
b) Diving	1	2	3	4	5
c) Hiking	1	2	3	4	5
d) Golf	1	2	3	4	5
e) Sailing	1	2	3	4	5
f) Swimming	1	2	3	4	5
g) Yoga	1	2	3	4	5
h) Other (please specify) ……………………	1	2	3	4	5
i) Other (please specify) ……………………	1	2	3	4	5
j) Other (please specify) ……………………	1	2	3	4	5

18. Please rate the importance of the following factors when choosing your holiday destination, using the scale (1-5), where 1=not important and 5=very important

Factors	Rate the level of importance				
Natural & Cultural Heritage Tourism					
a) Clean sites	1	2	3	4	5
b) Working hours of sites	1	2	3	4	5
c) Use and availability of audio-visual media on-site	1	2	3	4	5
d) Guide services	1	2	3	4	5
e) Easy Access to sites	1	2	3	4	5
f) Provision of toilets and benches/chairs for resting if needed	1	2	3	4	5
g) Variety of cultural events	1	2	3	4	5
h) Affordable cost of the sites	1	2	3	4	5
Sports & Leisure Tourism					
i) Variety of sports offered	1	2	3	4	5
j) Working hours of facilities	1	2	3	4	5
k) Access to facilities	1	2	3	4	5
l) Variety of sports events	1	2	3	4	5

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m) Affordable cost of activities	1	2	3	4	5
Eno-gastronomy Tourism					
n) Variety of eno-gastronomy events	1	2	3	4	5
o) Quality of offered activities	1	2	3	4	5
p) Access to the activities	1	2	3	4	5
q) Affordable cost of activities	1	2	3	4	5
Spiritual & Religious Tourism					
r) Cleanliness of places (e.g. churches)	1	2	3	4	5
s) Visiting/Working hours	1	2	3	4	5
t) Guide services	1	2	3	4	5
u) Ease of access to sites	1	2	3	4	5
v) Variety of spiritual/religious events	1	2	3	4	5
Health and Wellbeing Tourism					
w) Quality of services offered by specialised personnel (e.g. masseurs)	1	2	3	4	5
x) Quality of facilities and services	1	2	3	4	5
y) Affordable cost of services	1	2	3	4	5

19. Please rate the importance of the following issues:

General factors and tourism infrastructure	(1=not important and 5=very important)				
a) Cuisine	1	2	3	4	5
b) Natural environment	1	2	3	4	5
c) Local culture	1	2	3	4	5
d) Hotel accommodation	1	2	3	4	5
e) Cottage accommodation	1	2	3	4	5
f) Camping	1	2	3	4	5
g) Security	1	2	3	4	5
h) Cleanliness	1	2	3	4	5

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i) Availability of direct flights to/from destination country	1	2	3	4	5
j) Local transportation (including buses, metros and taxis	1	2	3	4	5
k) Easy access (accessibility)	1	2	3	4	5
l) Healthcare and medical services	1	2	3	4	5
m) Hospitality of natives and "street level experience"	1	2	3	4	5
n) Available and reliable tourist information	1	2	3	4	5
o) Opportunities for socialization	1	2	3	4	5
p) Support of guide(s)	1	2	3	4	5
q) Telecoms services including internet	1	2	3	4	5
r) Low prices	1	2	3	4	5
s) Quality of airport services	1	2	3	4	5
t) Sustainability and environmental friendliness	1	2	3	4	5

a) **Please state any other additional**
b) ❑ Parks
c) ❑ Marinas
d) ❑ Supermarkets
e) ❑ Pharmacies
f) ❑ Info points
g) ❑ Toilets
h) ❑ Casinos
i) ❑ Thematic experiences (e.g. in agro-tourism)
j) ❑ Other (please specify): …..

20. Last country you visited …………………………………......

21. Next country you plan to visit …………………….................

State the reason…………………...

THANK YOU!

This questionnaire is anonymous. In case you would you like to be kept informed about the ESCAPE reports as well as the tourism packages we will develop in the next 12 months, please fill in your contact details below. All your details will remain confidential.

Name & Surname	E-mail address	Postal address

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