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## Introduction

The present document presents an overview of the outcomes of a preliminary survey issued by the EUROSEN - Europe for Senior project. It provides both the country-specific highlights and general needs and expectations that people aged 55+ have and expressed in the framework of the project, thus paving the way to the definition of tailored solutions taking into account the peculiarities of the EUROSEN local contexts.

The questionnaire was translated into Italian, Slovenian, Romanian and German, and circulated in paper version and as hyperlink for on-line completion (in Italy and the EU). The paper-version questionnaires proved to be very effective especially in Romania and Slovenia, while the replies gathered by AGE Platform Europe were especially expressed through the on-line questionnaire.

The consortium tried to reach also respondents not used to compile questionnaires, not used to travel a lot, and not acquainted with languages, in order to provide a composite overview and voice the needs and expectations also of those seniors normally less involved in tourism and in European projects.

Carried out during the summer of 2016, the questionnaire gathered altogether 780 replies:

- 253 from Italy
- 203 from Slovenia
- 75 from Romania
- 36 from Austria
- 213 from all over Europe (including the above mentioned countries).

Its outcomes has shaped the definition of the tourism concept by EUROSEN (presented in D3.1), as well as that of cluster of local culture in the project (deliverable D2.2), suitable then to inform the Tourism Quality Certification and the sets of trainings planned by the project.

## Overview of the results from Italy

The Italian respondents belong to the **age range 55-75** in majority, with a high school and secondary school degree (and 23% of the sample having obtained a university degree). With respect to the knowledge of languages, Italians do less well than other European colleagues, with 46% of the sample not being able to interact in a foreign language. Nevertheless they love to travel also outside the Italian borders, although Italy is the preferred holiday destination. It is then not a surprise if discover and culture are the driving reasons for holidays (47%).

With regard to seasonality, **summer time is still the favourite** season (66%), followed by spring (55%), for normally a trip that lasts from 4 to 13 nights (71%). The majority of the sample prefers to organise their holidays individually (57%), but about 37% of it relies on a travel agency and 30% on organisations, such as parish organisations, senior associations, or others. The journey is rather a tailored one (61%), rather than a standard tourist package (39%). Among the favourite **source of information are relatives and friends (45%), and internet (44%)**, followed by travel agencies (33%), guidebooks and specialized magazines (28%) and senior or parish associations (28%). Social networks are not very well exploited as a source of information.

The travel companion is important, and the most of respondents prefer to **travel with relatives (47%) and with people they know (44%)**, and with a partner (26%). The replies shows that **nature (82%) and culture (70%)** are mostly searched by the sample (scored with 4 and 5), followed by local eno-gastronomy (66%, scored with 3 and 4), and health and well-being (59%, scored with 3 and 4). When asked about their interest in combining the visit of well-known cities with time spent in smaller towns and villages in the nearby, the proposal is appreciated by the majority of the sample (85%), with the majority loving to attend a show of local music and dance, but not to be directly involved in it. The respondents' replies are rather scoring the proposed actions with a vote of 3 out of 5, but the replies stating that they are not interested in them (scored with 1 and 2) cannot be neglected, as sometimes predominant (e.g. people do not seem interested in sharing traditions and stories with local people -42%- or in preparing dinner with them -52%-).

Activities such as **visiting a local farm or a shop, and going around with local people are much appreciated**, with the majority of the sample stating that it would be interested in spending part of their holidays like this (respectively 73% for the farm, 68% for the local shop and craftsman shops, and 89% for wandering with locals). The cooking lesson and the experience of local dishes was average welcome, with 38% of the sample not liking the idea (score 1 and 2), 26.5% approving it in between (score 3) and 35% appreciating it (score 4 and 5).

Among some free comments provided by the participants, several of them expressed their appreciation for the new form of tourism proposed by EUROSEN. Three persons indicated a preference during the holidays to interact with younger local people rather than to stay

with the seniors of the visited country. The willingness to spend time with youngsters, such as grandchildren, is confirmed also with respect to the favourite partners for holidays.

## Overview of the results from Slovenia

The Slovenian sample was filled in by a majority of women (74%), covering the age range 55 - 65 (51%) and 66-75 (38%), mostly having a diploma from high school (54%) or secondary school (20%) and living in a couple (60%). With respect to the knowledge of languages, **more than 80% of the sample knows a foreign language** and there were 162 people (82%) speaking from 1 to 4 different languages! English, German and Croatian are among the most widespread languages known from the selected sample.

In line with other countries, the usual time length for holidays is 4 to 7 night (42%) and from 8 to 13 nights (31%), which is time used **mainly to rest and relax (41%), to take care of health and wellbeing (18%), to have fun and leisure (17%) and to go for discovery and culture (15%)**.

Summer time is still the preferred season (33%), but **autumn is almost as much appreciated (31%), followed by spring (29%)**.

When planning their holidays, the respondents tend to use less than one-month time (36%) and from 1 to 3 months (32%), and the majority of them organize their trips autonomously (54%), while 32% rely on a travel agency. The result is that holidays for the Slovenian interviewed seniors are rather a tailored journey (57%) than a holiday package (43%). With respect to the Italian respondents, however, **travel agencies are the most consulted source of information (27%), followed by relatives and friends (26%) and internet (26%)**. Again in comparison with the Italian colleagues, specialized magazines and guidebook are less frequently consulted in Slovenia.

Again differently from the answers gathered from the Italian survey, the Slovenian respondents privilege a **holiday with a partner (44%)**, rather than with relatives and in groups, as well as they prefer to reach their destination **by car (59%)**, rather than by plane (22%). The average daily budget, on the contrary, does not surprise, as it is in line with the responses gathered from all the surveys in different countries, confirming the lowest budget (50€-100€/day) as the preferred one.

Once asked about the desired free time during their holidays, the respondents opted for a timeframe of around 2 to 4 hours a day (33%), or at least one hour (28%), while about 24% do not seem to need some time off, and 15% of the sample would rather go for the whole morning or the whole afternoon. With respect to the mode of transport, people prefer to walk (40%) and move by car or van (40%).

With regard to the mode of payment, **cash is the most loved method (51%)**, followed by the card (38%). This data is also interesting to compare with the results from other

countries, where it has been assessed that the payment by card is the most appreciated one.

**Nature** is confirmed being the preferred topics chosen to select a destination (64.85%), together with **health and wellbeing** (64.75%), **which is a rather new data compared with the surveys carried out in other countries**. Local culture and art are also considered very important for the 44% of the sample, followed by sport and leisure (31%), which is another data that is new across the responses collected throughout Europe. Enogastronomy is rather well taken into account, with 66% of the sample considering it as an important theme steering the choice for a destination (sum of scores 4 and 5). Spirituality, on the other hand, confirm the trends met elsewhere, not being perceived as an important theme for choosing the holiday destination for more than 40% of the same (sum of scores 1 and 2).

Digging into the actual potential interests of tourists, replies highlight that there is great willingness to enjoy the local landscape, and interact with people (80% of scores 4 and 5), especially to visit local shops and exhibitions (67%), as well as local farms and being explained local products (54%) Cooking known dishes to the hosting partners is not among the preferred activities, as only 38% of respondents appreciate it a lot (scores 4 and 5). On the other hand, though, when asked if they want to learn how to prepare a typical dish with their hosts, 47% of the sample shows a good or very good interest in the proposal.

It is nevertheless important to state that this latter part of the questionnaire was not completely understood by a good number of respondents, and answers were not always completed, thus making such an analysis less accurate, but still interesting for the project.

### Overview of the results from Romania

Overall it can be stated that in Romania, specifically in Horezu region, there is a particular interest for this new form of tourism that EUROSEN project wants to propose. More precisely, as shown above, **there is a great interest in spending time in small villages to experience the traditional life and to socialize with locals** and moreover, in having a local kitchen lesson or carrying out different activities such as visiting local shops or exhibitions of typical handicrafts or going around and enjoying the local landscape or attending a show of local songs and music or watching a traditional dance show. This is also strengthened by the fact that **“local culture/art” as a theme for choosing a holiday destination ranked second after “nature”**.

The demographics of the respondents (55+) is quite ordinary, a little more women than men (in accordance with the total population of the region), two thirds of the respondents being in the 55 – 65 year age range, many of them with high school degree and the majority of them living with husband/wife or partner. The knowledge of a foreign language was a special pattern captured in the demographic analysis. Thus, a little more than half

indicated the knowledge of a foreign language (among these French ranking first followed closely by English). However, if going in more detail, one can observe that more people declared that they understand a certain language rather than to speak that language, which is quite normal.

As already mentioned an important part of the respondents referred to tourism and travelling patterns. In this regard it is important to wrap up some specific characteristics presented below.

So, even if overwhelmingly there is a first choice for spending holidays in Romania, almost half of the respondents declared also the preference of spending holidays abroad in a European country. The **usual length of holidays is predominantly less than two weeks**. Regarding the reason of journey, with relevance for our project, is the fact that **culture as a main reason to travel ranked second after “rest and relax”**. Usually, people like to travel during summer (almost two thirds of respondents stating this preference). Romanians do not plan too long in advance their holidays, with one third of our respondents planning the holiday less than one month in advance and 27% of respondents between one and three months in advance.

Predominantly, there is a preference for the **individual organization of holidays** but at the same time a considerable part of replies (39%) opts for organised trips, especially from organizations such as older people’s associations or parish associations. **Tailored journey** is preferred by most of respondents. **Internet** is the main source of information when choosing a holiday destination.

There is a preference for **travelling with a partner**. A strong preference (70.7%) for using airplane when transferring from home to destination could also be observed. Regarding the average daily budget while on holidays abroad, the sample prefers to spend less than 50 euro. Walking is the most preferred way to move around for Romanian tourists. **Payments by cash** are the rule among Romanians while card (credit/debit cards) is used by fewer respondents (15.3%). One can say that the participants in our survey were rather healthy persons since they do not require medical surveillance and three quarters of them had no dietary needs when travelling.

When enjoying their holidays, the respondents prefer **visiting local shops or an exhibition of typical handicrafts**, thus experiencing how local craftsmen work (by 41 responses). The second activity rated as being “very important” was “Interacting with local people and share with them traditions, habits and discover communalities” (37 responses) and the third was that “Going around and enjoying the local landscape, meeting people and interact with them to understand how they live” (36 responses).

Least attractive activities seemed to be: “Visiting a local farm and be explained local products and take part in daily activities directly with the farmers” (only 23 respondents considered this as being “very important” and 9 respondents as being “important”), “Cooking yourself some dishes of your country and eating them combined with typical foods of the visited region in a dinner with the local people” (only 23 respondents considered this as being “very important” and 7 respondents as being “important”) and

“Not only by attending the shows but also being involved together with the local people and singing / dancing in a very informal way” (only 26 respondents considered this as being “very important” and 3 respondents considered as being “important”).

### Overview of the results from Austria

All of the 36 participants were Austrians, 67% of the sample was female and 33% male. The majority of respondents (53%) are between 66 and 75 years old. The majority of those who were surveyed (56%) have completed a secondary school, 28% finished elementary school, 11% high school and 5% University, they live with partner (64%), alone (25%) and with their relatives -son, daughter, grandchildren etc. (11%). 66% of the respondents cannot speak another language besides German. They report that they need someone who helps them, when they have to interact with foreign people and that they prefer to spend their holidays in Austria, followed by other European countries. The duration of holiday does not innovate with respect to what stated by other countries, with the preferred range covering 4 to 7 nights, and if possible going beyond until 13 nights.

The main reasons for travelling are **discovery and culture (50%)**, **rest and relax (44%)** as well as leisure and fun (33%). The seniors prefer to travel in the **low seasons autumn (75%) and spring (56%)**. Summer and winter are not as important for vacation. This is quite an innovative reply in the landscape of answers received, as summer and spring were the favourite seasons for travelling in the other surveys, except from the Slovenian replies, where autumn has the almost same relevance than summer, although it is not predominant.

The 36 Austrian respondents prefer to plan their holidays one to 3 month in advance, in line with the other replies from the other countries, while quite differently from the others, the Austrian survey showed that the majority of the interviewed seniors **(58%) relies on organizations (like older people’s associations, parish associations, etc.)** for organizing their vacations, as well as they organize their holidays **individually (53%)**. Travel agencies are used to organize holidays (28%) with a percentage that is rather similar to what stated in Slovenia and in Italy.

Quite surprisingly, the main sources of information are **older people associations or parish organizations (67%)**. Also travel agencies (39%) and relatives and friends (33%) are important. Internet, guidebooks and specialized magazines are not that relevant, in contrast to what reported in other countries, while social media are confirmed at the lowest rank also among the Austrian respondents.

Seniors prefer to travel in a **group with people they know (61%) or with their partner (61%)**. In contrast to what reported in Italy, the respondents are less interested in spending their vacation with their relatives/family/grandchildren; like other countries, though, they

are not much interested in going for holidays with a group with people they do not know or alone

The majority of respondents prefer to travel to the destination via **van (69%)**, with the airplane (56%) and the car (36%). The train was less important and the boat has not been chosen by anyone. The option of the van is also innovative, as less chosen in the replies gathered from other countries. On the contrary, there is no surprise for the preference for low budget (50-100€/day).

The vast majority of respondents like to have between **two and four hours of free time** in order to relax at the hotel or to go around alone. Interestingly, almost one third replied that they do not need free time at all, because they enjoy being involved in the common program of the group. A small number of respondents stated that they need at least one hour of free time or the whole afternoon/ morning

Once the tourists have reached the destination they prefer to move around **via train (58%)** and **by foot or walking (42%)**. Also the car or van is an option as well as the bike. The choice of the train is also rather innovative with respect to what seen so far.

The vast majority prefers to pay for their services in **cash (58%)**. However, also payment by card (credit card, debit card etc.) and bank transfer have been chosen.

Nature and culture are confirmed to be driving topics also among Austrian respondents. Their data do not differ much from the results gathered from the other surveys, a part from the latter two categories: religious theme, sport and leisure theme. In the Austrian case, indeed, there is a slightly increased interest (more score 4 and 5, which means "important" and "very important", especially for religious topics) than what reported in the other countries, where the majority of responses were rather rated with score 1 and 2 (meaning not important).

On the seniors' interest in combining the visit to well-known cities with time spent in small, nearby villages, the respondents showed high interested (in average 4,03 of 5 points) in combining the visits. As confirmed by the other surveys as well, watching, attending traditional dance show and local music, and cooking together are not conceived as very appealing, getting the lower score.

## Overview of the results from other countries

The composite sample of **Belgians (60%), Romanian (12%), Irish (7%), and other Europeans (Czech, English, Italians, Dutch, ...)** who replied to the questionnaire represent rather equally both sexes, mainly belonging to the age range 66-75 (49%) with the younger cohort representing 34% of the sample (55-65 years of age).

The question on the education reveals that the majority of the surveys have been filled in by people with a degree from high school (45%) and even university (28%). This has been

mirrored in the replies related to the ability of interacting in another language, and it emerged that 57% of the respondent feel comfortable at least with one foreign language.

Travel abroad (81%) in the EU is very well ranked, while the internal (national) trip ranks below (50%) and the international travel reaches the third place (35%). The preferred length of stay is 8-13 nights (43%) and 4-7 nights (29%), followed by 2-3 weeks by 16%. Only 6% opts for more than 3 weeks.

For the majority of the 153 respondents, holidays are meant for **discovery and leisure (73%)**, followed by relax and rest (54%) and some funny activities (28%).

With respect to seasonality, nowadays the interviewed senior prefer to travel in **spring (79%) and autumn (72%)**, and summer following in the third position<sup>1</sup>.

The majority of the respondents prefer to organise their trips autonomously, and to opt for a tailored trip (59%), rather than a holiday package (41%), getting informed mainly from the internet (69%), guidebooks and specialised magazines (41%), travel agencies (38%) and friends and relatives (34%), for travelling normally with the partner (70%) and in group with known people (45%).

**The time to get relaxed is very important:** the majority of respondents want to have at least 1 hour (30%), and between 2 and 4 hours (29%), if not more (16%). Almost one fourth of the sample enjoys staying with the group without the need for a pause alone.

Once they have reached their destinations, the interviewed tourists prefer especially to move by foot, walking (46%) and by car/van (33%). And payments are privileged by card (69%), followed by far by the payment by cash (23%).

Confirming trends and opinions emerged in other surveys and studies, nature and local culture share the top positions in the interest of tourists aged 55+. Eno-gastronomical reasons for travelling are also important, but less relevant, whereas spiritual activities and sport and leisure seem not being very attractive at all (especially the spiritually-led tourism).

When asked about options combining the visit of well-known cities with time spent on smaller villages, getting to meet the local cultures and traditions, the majority of the respondents seemed very in favour of experiencing the genuine life of little villages and **get to meet the locals** (about 61 people of respondents appreciate this, and 31 appreciate this very much).

**Visiting a farm, local shops and interacting with local people** are also enjoyed activities, in particular these latter ones, with about 60 people wishing to visit local shops and 96 people wanting to wander around and get to know local people (sum of scores 4 and 5). On the other hand side, cooking traditional dishes and being directly involved in dance stages have been less welcomed, with consistent amount of scores 1 and 2.

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<sup>1</sup> Multiple choices were allowed for this question on seasonality.

## Summary of findings on senior tourism

The questionnaire's replies can provide a number of data whose analysis can be tailored on the specific queries of the research. In the case of the EUROSEN project, the questionnaire's main findings can be summarised as follows.

**Seasonality still matters.** With respect to what highlighted in the ESCAPE questionnaire<sup>2</sup>, where summer time was the favourite season, **autumn and spring** have been listed among the preferred seasons for travelling by the majority of the respondents, with the exception of the Italian respondents, who opted for summer time in majority (66%).

The interviewed sample prefers to organise their holidays individually, but travel agencies and organisations, such as parish organisations, senior associations, or others are also considered as a reliable sources of information and help in planning. The fact that people aged 55+ prefer to organise autonomously their holidays is confirmed also by the **preference for tailored holidays**, rather than standard tourist packages, and this transversally across countries.

Despite very widespread stereotypes, internet is also very well used by the respondents to search for information and planning the trips. Relative and friends are mostly appreciated as source of information, but the web competes well with them, ranking then travel agencies, guidebooks and specialized magazines below in the ladder (especially in Slovenia). **If internet is an appreciated tool, on the contrary social networks are not very well exploited as a source of information.**

With respect to the activities that people appreciate to carry out while on holidays, across countries it emerged that there is great willingness to enjoy the local landscape and get to know the local culture. In particular, people seem to like **visiting a local farm or a shop or exhibitions, and going around with local people**. The cooking lesson and the experience of local dishes was however average welcome, alongside with the direct interaction in local dances or singing experience, which are very important elements for EUROSEN to be taken into account.

The conclusions provided by the EUROSEN survey must be coupled with the results of the ESCAPE survey, conducted at the end of 2014. Its results and trends, available on-line<sup>3</sup> in the "*Report on Senior Tourists' needs and demands*", have been confirmed by this current work. In particular it showed that 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. Besides, older

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<sup>2</sup> <http://www.age-platform.eu/policy-work/news/escape-project-publishes-first-results-older-travellers-preferences> and <http://www.escape2europe.eu/documents>

<sup>3</sup> <http://www.age-platform.eu/policy-work/news/escape-project-publishes-first-results-older-travellers-preferences> and <http://www.escape2europe.eu/documents>

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

With respect to seasonality, the ESCAPE survey showed a preference to travel in summer and spring, which has been modified by the EUROSEN results, more inclined to travel in autumn and spring. ESCAPE confirmed that travellers 55+ tend to be quite autonomous in planning and managing their travels, opting less frequently for all-inclusive packages, preferring to organise their holidays individually.

When asked to rate the importance of themes, topics and activities, “nature and culture” are the preferred touristic themes, and the ESCAPE sample considered very important to have clean and easy accessible natural and cultural heritage sites, 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.

For more insights on the country-specific highlights, covering Bulgaria, France, Greece and Portugal, as well as on additional patterns and studies on senior tourism, the EUROSEN team invites to read the ESCAPE [Report on Senior Tourists' needs and expectations](#) and its [main findings](#).

To complement the picture emerging from the EUROSEN questionnaire, the French Ministry for Economy, Industry and Informatics issued an economic study (February 2016<sup>4</sup>) portraying the French senior tourists in 2014, with a focus on people aged 62+. The paper reveals that about a third of all French tourists belong to that age range, travelling a lot in August and September (the figures for both months are equal, showing that there is a preference also for low season tourism), for about 4-7 nights and a total daily cost of 400 EUR per person. This cost equals about 55€/night. Such a low cost for nights has been attributed to the more frequent choice of forfait/packages where hotel rooms, meals and some transports are included, as well as the choice of taking holidays in September rather than in high season. Last, it seems these senior tourists privilege cultural activities rather than shopping, sports and entertainment parks.

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<sup>4</sup> [http://www.entreprises.gouv.fr/files/files/directions\\_services/etudes-et-statistiques/4p-DGE/2016-02-4Pages-51-tourisme-seniors.pdf](http://www.entreprises.gouv.fr/files/files/directions_services/etudes-et-statistiques/4p-DGE/2016-02-4Pages-51-tourisme-seniors.pdf)

## Relevance for EUROSEN' Clusters of Local Culture

When drawing the main conclusions for the EUROSEN project, partners agreed in the following highlights. The survey confirmed the **acceptance of the interviewed seniors of the new tourism concept promoted by EUROSEN** i.e. the combination of famous destinations with less known locations (question 24).

Countries	Positive scores ( 4 or 5 i.e. very important / important)	Negative scores (1 or 2 i.e. not important or of low importance)
Italy	59%	15%
Slovenia	72%	10%
Romania	87%	4%
Austria	80%	10%
EU-wide survey	61%	9%

The **language** problem in the interaction with foreign visitors remains an issue but it can be overcome since in the groups at least 1/3 of people speak another language (34% of people in Austria, 46% in Italy, 56% in Romania and 82% in Slovenia).

Among the themes proposed by EUROSEN, **nature and culture** are considered important everywhere; in the same way religion and sport/leisure are not so interesting topics for justifying a travel. A specific attention has to be paid by the CLCs to the theme of health / wellness that – a part from Italy – was ranked among the first 3 positions.

Nevertheless it is not clear if the emphasis to health has to be considered as a request of health-related travels (e.g. travels for thermal treatments) or as the request to organize the travel in a safe way by taking into account the frequent health problems the seniors could have.

Ranked themes per country	Italy	Slovenia	Romania	Austria
Nature	1st	2 <sup>nd</sup> (85%)	1st	1st
Culture / Art	2nd	3rd	2nd	4th
Eno-gastronomy	3 <sup>rd</sup> (48%)	4 <sup>th</sup> (67%)	4th	3rd
Health	4 <sup>th</sup> (46%)	1 <sup>st</sup> (87%)	3rd	2nd

Religion	6th	6th	5th	5th
Sport / Leisure	5th	5 <sup>th</sup> (59%)	6th	6th

The answers to the question related to the preferred activities during the holiday represent probably the most important input for the CLCs: on the contrary of a general expectation, the interviewed **seniors seem reluctant to a too active involvement** (e.g. dancing / singing together with the local people or contributing in the preparation of an “international dinner”)

Activity	Italy	Slovenia	Romania	Austria
Watching a dance show	5th	3rd	5th	6th
Attending a show with local music	4th	4th	4th	7th
Singing and dancing together with the local people	8th	7th	8th	8th
Contributing to the preparation of a dinner	7th	8th	7th	5th
Interacting with the local people and sharing stories	6th	6th	3rd	3rd
Visiting a local farm	3rd	5th	6th	4th
Visiting local shops / exhibitions of typical handicrafts	2nd	2nd	1st	2nd
Going around, enjoying the landscape and interacting with local people	1st	1st	2nd	1st

The message for the EUROSEN project is then the following:

- During their holidays, seniors like to do what tourists do typically i.e. going around, enjoying the landscape, shopping;
- There is a moderated interest for interacting with the local people and sharing with them stories (this interest is higher in Austria and Romania);
- Other activities such as attending a show of local music or local dance, visiting a local farm have different levels of acceptance but in general they are not considered as the best way to spend the time when being in a foreign country;
- For sure the majority of seniors do not like to be personally and actively involved in singing, dancing or cooking.

When preparing the visit programs and the tourist packaged, the CLCs have to take into account these outcomes.

## Designing the itineraries

Although EUROSEN, according to the call, is oriented towards transnational travels, the offer by the local tourist operator (TO) must include also **national travels** preferred by the majority of the seniors (53% of all respondents). To assure a **touristic flow as high and continuous as possible**, it is essential to keep high the commitment and the interest in the CLC and the domestic tourists can cover the periods of no show from travellers coming from abroad.

The data of the survey about the length of the travels let emerge that trips from 4 to 13 nights are to be privileged (72% of all respondents), and offers equivocal interpretations. However travels of a **length around one week** well justify the effort of organization and displacement. Of course the week could be extended mainly if the holiday includes beyond the travel also a stay in pleasant resorts.

The interviewed travellers privilege a mix of culture and relax (63% of all respondents) which strongly suggest to **cut the times of transfer in favour of stays** (“see less but see better”). The relative majority of seniors prefers from 2 to 4 hours of daily relax during the trip (33% of all respondents). **2 hours minimum of relax could be a reasonable solution for most of the itineraries designed by the TOs.**

The favoured periods of travelling by seniors meets the priorities of the call (**spring and autumn** sum to 58% of all 780 preferences) but the programs must **include also summer** offers (29%), due to the necessity to favour the highest flow towards the CLC.

An encouraging statistic for the EUROSEN project relates to the limited time for planning (58% of the travels are planned not earlier than 3 months) which presents a **chance to realize the first EUROSEN travels** before the end of the co-financed period of the project. The reduced times of planning are favoured by the large prevalence of people who choose to self-organize the itineraries (48%). If we combine this answer with the number of people travelling together, we must conclude that the TOs (Tour Operators) must **design with priority programs for singles-couples-small groups “assisted-not-accompanied”**, which prevail in front of more numerous groups (62%).

**Flight (27%) and car (own? 41%)** are the most preferred means of transport to get to the destinations, and it looks like leaving a limited space for the bus (13%). However, the choice by the TOs of the means of transport must be compatible with the limits of cost, stated below 100€ a day (80%). The preference to go around walking (50%) encourages the **cultural visits** of the destinations.

## Designing the communication and promotion of itineraries

The survey let emerge that seniors search for information in **internet (24%)**. The outcome of the survey offers a breakdown of the most effective mix of communication channels to take into consideration for the promotion.

The limited time for planning (58% of the travels are planned not earlier than 3 months) points out the immediate relevance of a **promotion oriented to the final customer**

(B2C). To the same extent, the trend of seniors to self-organize their journeys autonomously (48% of the total sample) confirms that the promotion must be not only directed to the Associations and TOs (B2B) **but also to individuals**, final consumers.

Last, the preference for tailored travels (62%) rather than for touristic packages, drives the communication towards itineraries pre-designed but with **a message of a flexible offer** able to be customized according to the clients choices.

### **Welcoming and entertaining in the Cluster of Local Culture (CLC)**

Both the welcoming and entertainment programmes offered by CLC and the visits to the most famous destinations must take into account the themes preferred by the seniors who show various modulations of interests:

- About 42% of the total sample like the kitchen lessons
- Most of the interviewed people prefer to visit, assist, interact with local people
- Few respondents like to participate to dances and songs (8%) and show how to cook their own specialties (9%).

It invites the CLCs to:

- Add to the above activities also **other original, “different” experiences** enjoyable in their places
- Exploit the local monuments of industrial archaeology, solutions to enrich, defend and/or **protect the territory and improve the life**
- Stress out the **storytelling of the events** representative of their life and culture, past and present
- Adequate and finalize the descriptions uploaded into the website and included in the **messages of communication**

Among the activities of the CLC must be developed, those preferred by the seniors are: moments of **immersion into the nature (24%), artistic and cultural experiences (20%), eno-gastronomic tours (16%), enjoyment of moments of wellbeing (20%)**. The CLC must plan **entertainments for singles-couples-small groups (62%)** in a profitable way (e.g. defining days/hours in the week to gather more people to attend the show of the CLC). It stresses out the relevance of a **mix of tourists from far away and from the neighbouring territories**.

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