

The European market potential for babyboom tourism

By 2025, the baby boomer generation will account for 20% of the European population. Compared to other generations, baby boomers have more time and money, and the desire to travel at different times of the year. During their travels, they seek new experiences, participate in active holidays, which may also include sightseeing and discovering new cultures. Germany, the United Kingdom and the Netherlands offer the main European source markets. Baby boomer tourism flows are expected to remain low in 2020 and 2021, because of their susceptibility to COVID-19, which provides an opportunity for operators to use this time wisely and put effort in developing new products for this target group.

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1. Description of the target group

The baby boomer generation consists of people born between 1945 and 1960 (or between 1946 and 1964), who will be between ages 55 and 75 in 2020. A large part of this group has already retired from the workforce. Their main reason to travel is to spend more time with friends and family, but other important reasons for them to travel include relaxation, social interactions, physical exercise, maintaining health and well-being, nostalgia, learning and excitement. [Cruises](#) and family visits remain popular among this generation, however, they also show interest in authentic experiences and [getting to know locals](#).

Baby boomers attitudes, habits and formation differ from other generations in many ways. For example, they prefer communication by telephone, while generation Y (those born roughly between 1981 and 1995) prefers text or social media — for more information, read [our study on generation Y tourism](#). Figure 1 provides an overview of the characteristics of different generations.

Figure 1: Characteristics per generation

Talking a different language					
Formative experiences	Millennials (born 1981-1995)	Baby boomers (born 1946-1964)	Generation X (born 1965-1980)	Generation Y (born 1981-1995)	Generation Z (born after 1995)
	Maritime upbringing Social skills Respect for family Different gender roles - particularly for women	Cold War Swinging London Rough holidays Youth culture Newspapers Family orientation	Fall of Berlin Wall Reagan/Dukakis Techniques Love Aid Early mobile technology Discrete values	Internet Social media Invention of Key Mobile TV Google Earth	Economic downturn Social networking Mobile devices Cloud computing Web 2.0
Percentage in the workforce	3%	33%	35%	29%	Employed in either part-time jobs or apprenticeships
Attitude toward career	Join the firm	Organizational careers are defined by employees	"Portfolio" careers - leaving professions, not to employees	Digital entrepreneurs - work with organizations	Multitaskers - will move seamlessly between organizations and "work-life" networks
Signature product	Automobile	Television	Personal computer	Feature smartphone	Google glass, 3D printing
Communication media	Formal letter	Telephone	E-mail and text message	Text on social media	Hand held communication devices
Preference when making financial decisions	Face-to-face meetings	Face-to-face mostly but increasingly will go online	Online - would prefer face-to-face if time permitting	Face-to-face	Solutions will be digitally created/verbal

Source: [Barclays](#)

Table 1: Examples of activities baby boomers enjoy and operators that offer them

Activities	Examples
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Social and spiritual activities such as art galleries, cultural experiences or sporting events	Jeremy Holton offers painting holidays in Thailand, which include art immersive accommodation, a gallery of local art, oil painting workshops, among other activities.
Water-related activities, ocean cruises , river cruises	Aqua Expeditions offers small-boat luxury river cruises in Peru, Cambodia and Vietnam.
Sports activities that may include tennis, jogging, golf, aerobic activities, etc.	Golf Breaks organises golf holidays to South Africa, Thailand and other countries.
Active relaxation, wellness experiences, etc.	The Sanctuary by Pure Yoga offers a meditation space near the Hong Kong airport.
Sightseeing on their own, touring with locals, community-based tourism , etc.	Heritage Tours of Saint Lucia offers trips in close collaboration with local communities.
Culinary activities	Tripaneer offers culinary vacations in Africa and the Middle East.

Baby boomers prefer holidays in areas with mild climate. They like good quality services and amenities, and mostly travel during spring and summer because of the nice weather. They avoid travelling in the winter and fall and when cities are busy with families and children. At the same time, they often do not need to take advantage of a long weekend or specific vacation period, such as school holidays, taking mostly long-haul trips. This offers opportunities for operators in destination countries farther away from Europe. Hotel and motels remain the preferred accommodation for baby boomers during their travels because they offer more safety and comfort. In terms of transportation, baby boomers favour planes first, then cruise ships.

Baby boomers are generally wealthier and have more free time than other generations, so they can travel in the off season. When they book a trip, they choose a means of transportation based on their health. Despite being relatively wealthy, baby boomers search for special offers because budget is a determining factor in their travel choices. In most cases, this generation makes use of the loyalty programmes of airlines, hotels, travel companies and cruises to get offers, as well as because these programmes offer incentives for future bookings, such as good rewards with every purchase. They are not budget travellers; baby boomers spend more than double in accommodation than millennials. Baby boomers like to spend money on getting a local experience, as well on customised tours.

Baby boomers prefer to book their trips months in advance. They usually have a bucket list with places and new things they want to experience. Many of them enjoy the actual travel planning process. For this reason, they rely on online travel agencies rather than other resources. Baby boomers have become more confident using social media in the last few years, especially Facebook, the most popular among this age group. They also spend time reading online articles and blogs as sources of information, they shop for services and products

online, which expands their travel options. Smartphones are essential travel item for a lot of baby boomers during their trips abroad. They also appreciate easily accessible websites, which they can use to book their holidays themselves.

Tips:

Create a user-friendly website that is easily accessible, with complete information and quality content where the booking processes are smooth. Read [our study on how to operate successfully online as a tourism company](#) and [our study on how to implement online payments](#).

Make sure to have well trained, guest-focused, knowledgeable and hospitable staff to interact with guests and provide personalised holiday experiences.

Focus on the safety and comfort that includes barrier-free design and access, unsophisticated design rooms.

Target specific niches within the baby boom market, which is very diverse. Examples of these niches include the [multigenerational tourism market](#) and the market for [solo travel](#), which targets tourists who do not travel as a couple. Explore the potential of local cultures by focusing on products like [river cruising](#), [soft adventure trips](#) and [wine and food travel](#).

Offer your services via online travel agencies and European tour operators, as well. Read more about this in [our study on finding buyers in the European tourism market](#).

2. What makes Europe an interesting Babyboom market?

Baby boomers in Europe are generally wealthy and enjoy travelling. Boomers worldwide [travel an average of four to five times per year](#) for leisure purposes. In Europe specifically, this number is even higher.

By 2025, the generation born between 1946 and 1964 will account for 20% of the European population. In 2018, [the EU counted more than 7.5 million outbound tourists aged 55–64](#), which is equivalent to 10.7% of this age cohort in Europe.

The outlook for the baby boomer travel market was very good, given [the growing trend of baby boomers going travelling](#). However, we estimate that the COVID-19 pandemic will shrink the market significantly, also hindering our ability to estimate how it will develop going forward. The overall European outbound tourism market [is expected to shrink by 39% in 2020, then recover almost fully in 2021](#). These estimates obviously depend on the duration and impact of the pandemic.

We expect the COVID-19 pandemic to hit the outbound baby boomer tourism market harder than other age groups, because older people are more vulnerable to the virus' more serious complications. We also expect this market to take longer to recover, especially for long-haul destinations. When travel is considered safe again, we expect the baby boomer market to recover at a high pace. Baby boomers are eager to travel and want to do so while still in good health. Therefore, the opportunities for this market can mainly be seized in the long term.

Tips:

Use the lull caused by the COVID-19 pandemic to create new tourism products. To learn more about how to do so, read our report on [how to start developing your tourism products](#).

Target the domestic and regional baby boomer markets first, meaning try to attract travellers from your within your country or region. The European baby boomer market will take at least a few years to

fully recover, and your business needs to stay active during this time.

Read our study on [how to respond to COVID-19 in the tourism sector](#) to learn more about what you can do if your company is affected by the pandemic.

Offer products that include opportunities for family time and active relaxation, such as cooking classes, spa treatments, wildlife photography and yoga classes.

Offer your guests a seamless pre-travel experience, for example, taking pre-arrival requests.

3. Which European countries offer most opportunities as a Babyboomer market?

Germany, the United Kingdom, the Netherlands, Italy and Belgium offer most opportunities as source markets for baby boomer tourism in Europe. Belgium and the Netherlands are relatively small markets but consumers in these markets show more willingness to travel than in other countries.

People older than 55 made up 32.8% of the total EU-28 population in 2017. Italy was the EU country with the highest percentage of residents older than 54, with more than one-third in this age category. However, only a small percentage of Italian residents in this age category travel abroad. Ireland had the smallest share of people aged 55 and older among EU countries: 24.7%. The share of people aged 55 and older in the EU is expected to climb to 40.6% by 2050, at which point Portugal is expected to become the EU country with the largest percentage of seniors in its population, followed by Italy, Bulgaria and Lithuania.

Table 2 below provides indicators for outbound baby boomer travellers per European country. These numbers were collected before the COVID-19 outbreak, so they are now certainly much lower. Nevertheless, they offer an interesting insight into the relative importance of different European markets.

Table 2: Number of outbound travellers per year aged 55 and older per European source country, 2018.

	Population aged >54 in thousands	Percentage of the population aged > 54	Number of outbound travellers aged >54 in thousands	Percentage of the population aged 55-64 that participates in outbound tourism	Percentage of the population aged 65 and above that participates in outbound tourism
Germany	29,508	36%	4,001	17.6%	10.8%
United Kingdom	20,106	30%	2,766	17.9%	12.7%
Netherlands	5,608	32%	1,205	25.1%	20.4%

Italy	21,680	36%	1,021	7.8%	3.0%
Belgium	3,630	32%	848	29.4%	23.2%
Switzerland	2,652	31%	784	34.5%	28.7%
Poland	11,991	31%	707	7.5%	5.0%
Sweden	3,220	31%	650	17.8%	18.1%
France	21,598	32%	641	2.9%	3.1%
Spain	14,908	32%	540	5.3%	2.8%
Denmark	1,835	32%	518	36.5%	22.7%
Austria	2,826	32%	450	18.4%	14.4%
Norway	1,528	29%	181	10.5%	17.2%
Czechia	3,358	32%	162	7.2%	3.3%
Slovenia	697	34%	159	32.4%	15.3%
Hungary	3,166	32%	150	7.3%	3.0%
Portugal	3,587	35%	135	4.8%	3.0%
Ireland	1,211	25%	134	11.4%	10.8%
Slovakia	1,574	29%	117	11.7%	3.2%
Greece	3,726	35%	97	3.9%	1.8%
Lithuania	950	34%	94	20.1%	2.4%
Finland	1,916	35%	75	4.2%	4.2%
Croatia	1,425	35%	66	6.4%	3.6%
Latvia	653	34%	49	10.5%	5.6%
Bulgaria	2,436	35%	40	2.3%	1.1%
Cyprus	238	28%	38	20.1%	13.3%

Romania	6,091	31%	37	1.0%	0.3%
Malta	150	32%	32	33.3%	15.0%

Source: [Eurostat](#)

Germany

With approximately 82 million citizens, Germany has the largest population in the EU. The country also has the largest GDP in the EU, and fourth in the world: €3.3 trillion equivalent to €50 thousand per capita. The COVID-19 pandemic is [expected to shrink](#) Germany's GDP by 7% in 2020, but it is expected to grow 5% in 2021.

In 2017, German residents made 10 million trips to developing countries, spending on average €2,500 on their summer holidays, which is approximately 25% above the European average.

Table 3: Long-haul destinations for trips originating in Germany, 2017

Destination	Percentage of long-haul trips
North America	23%
South East Asia	18%
Africa	14%
Caribbean	11%
Latin America	11%
India	8%
Australia and New Zealand	6%
Middle East	5%
China	4%

Source: [Reiseanalyse](#), 2020

To attract German tourists, you need to offer sufficient information. These travellers tend to read a lot before visiting a place. Like most Europeans, they are direct in their communication, and are well known for their tendency towards organisation and punctuality.

Table 4: Preferences of German babyboomers concerning holidays

Types of holidays	Relaxing 61% Visiting family 37% Sightseeing 33 % Activity-based vacation 20% Romantic getaway 13%
Are interested in feeling pampered	73%
Seek cultural experiences	67%
Take a longer holiday compared to other generations	11.4 days
The plane is the main means of transportation when going on holiday	52%
The favourite accommodation type is the hotel	63%
Plan their trips at least one year in advance	32%
Choose their destination in advance	40%
They are not influenced by social media	78%
Online travel agencies are the main planning resource	61%

Source: [Expedia](#)

United Kingdom

With a population of 66 million and a gross domestic product of €2.3 trillion, the United Kingdom is the fifth largest economy in the world and the second in Europe. With a GDP per capita of €44 thousand per year, the British have less to spend than the Germans. Due to the COVID-19 pandemic, the British GDP is [expected to shrink](#) by 6.5% in 2020, then grow 4.7% in 2021. The UK officially left the European Union on 1 February 2020 (Brexit), but the country remains in the EU common market, under the same EU rules, during a transition period that goes until 31 December 2020. At this moment, it is still unclear what will happen afterwards, as the EU and the UK negotiate the post-Brexit terms.

Although the British economy is smaller than Germany's, British travellers have a higher preference for destinations in developing countries than German travellers. British travellers spend on average €2,100 on their summer holidays. Turkey (1.6 million trips), Thailand (1 million trips) and India (1 million trips) are the [most important developing country destinations](#) for British travellers, who tend to speak only English and no other foreign language.

Table 5: Preferences of British baby boomers concerning holidays

Types of holidays	Sightseeing 61% Relaxing 51% Visiting family 45% Romantic getaway 22% Activity-based vacation 12%
Are interested in having various activities on their trip	77%
Seek cultural experiences	70%
Take a longer holiday compared to other generations	9.4 days
The plane is the main means of transportation when going on holiday	61%
The favourite accommodation type is the hotel	67%
Plan their trips at least one year in advance	20%
Choose their destination in advance	41%
They are not influenced by social media	82%
Online travel agencies are the principal planning resource	42%

Source: [Expedia](#)

Netherlands

Among EU travellers, those from the Netherlands show the highest willingness to travel to developing countries on a per capita basis, according to UNWTO data that indicates that almost one out of every five trips (18.3%) originating in the Netherlands had a developing country destination in 2017. The Dutch GDP per capita is €50 thousand, one of the highest in Europe. Due to the COVID-19 pandemic, [the IMF expects the Dutch GDP to shrink](#) by 7.5% in 2020, and grow 3% in 2021.

Most Dutch travellers prefer to purchase services and compose their long holidays (>13 days) themselves (61%). A high percentage of Dutch travellers book their holidays online via commercial services, such as tour operators, airline companies, etc. (44%). The preferred accommodation for the Dutch on their long holidays is paid commercial accommodation, such as in a hotel, B&B, cruise, or youth hostel (55%). The decision-making process is mainly informed by recommendations from friends, colleagues and relatives (47%).

Dutch baby boomers [take longer holidays than Dutch millennials](#), as they generally have more spare time. Baby boomers spend on average 14% more money on their holidays when they travel abroad. Dutch baby boomers are also more concerned about sustainability during their holidays than millennials, as 19% of baby boomers consider sustainability important, compared to 14% of millennials.

Table 6: Key statistics on attitude of the Dutch towards tourism

Preferred accommodation:	For trips of 13 nights and longer: paid commercial accommodation such as hotel, B&B, cruise, youth hostel, etc. (37%), or a campground, in a tent, motorhome, caravan or holiday village (34%) For trips between 4 and 13 nights: paid commercial accommodation (53%)
Most popular types of holiday:	For trips of 13 nights and longer: package travel, except all-inclusive (61%) For trips between 4 and 13 nights: package travel, except all-inclusive (58%)
Most popular destination regions with developing countries:	Asia and Oceania (5%) Caribbean, Central and South America (4%) North Africa and Middle East (3%)
Most popular booking method:	Online commercial services, such as tour operators, airline companies (44%) Online commercial services, private housing individuals (27%)
Most important reasons to return to the destination:	Natural features, such as landscape, weather conditions (53%) Quality of accommodation (32%) Cultural and historical attractions (31%)
Most important primary reasons to return to the destination:	Natural features such as landscape, weather conditions (34%) Quality of accommodation (14%) Cultural and historical attractions (11%)
Most important information sources for decision-making:	Recommendations by friends, colleagues, and relatives (47%) Websites collecting and presenting comments, reviews and ratings from travellers (46%) Personal experience (29%) Websites run by service provider or by destination (26%)

Region of residence:	Rural area or village (43%) Small or mid-size town (34%) Large town or city (23%)
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Source: [EU, 2016](#)

Italy

Italy has a population of 60 million and a GDP per capita of €30 thousand. The COVID-19 pandemic hit Italy severely. The Italian GDP is [expected to shrink](#) by 9.1% in 2020, then grow by 4.1% in 2021. Italian travellers prefer culture above nature, and have a relatively [high preference for discovering new cultures](#): 34% see this as an interesting activity during holidays, according to IPSOS. Compared to travellers from other European countries, Italian travellers do not plan too far ahead.

Belgium

Belgium's population is 11.5 million and the country's GDP per capita is €38 thousand. Approximately four out of every five Belgians go on a holiday [at least once a year](#). For Belgian travellers, recommendations from family and friends, as well as online sources, are the main factors in deciding where to go. Approximately 60% of the Belgian population speaks Dutch, another 40% speak French, and at least 1% speak German. In addition to those, most Belgians are also able to speak either English or German, or both.

When Belgians go on a long holiday (>13 nights) they prefer package deals (except all-inclusive) or to compose their package themselves, staying in a commercially run accommodation (both a share of 38%). These are preferably booked via online commercial services, such as tour operators, airline companies, etc., excl. private housing from individuals: 38%. For these holidays, commercial accommodation, such as at a hotel, B&B, cruise, youth hostel, etc., is the most popular type of accommodation (55%). When preparing their holiday, Belgians most often rely on recommendations from friends, colleagues, and relatives (51%).

4. Which trends offer opportunities or pose threats in the European baby boomer tourism market?

The baby boomer tourism market is changing. A large part of this target group demands more luxurious trips and spend more money by bringing their families on multigenerational trips. In line with younger generations, baby boomers increasingly seek active vacations or book a cruise.

Luxury travel

Luxury travel targets people who want to pay a lot more for out-of-the-ordinary travel experiences, including elite and exclusive opportunities. Typical luxury travel experiences include extra sophistication and glamour.

Many baby boomers want to explore smaller, less touristic locations, yet authentic destinations, such as a luxurious trip to the Galapagos Islands. Places off the beaten path, such as Madagascar and the Cook Islands, as well as less-visited regions of common destinations like China and India are more attractive in this segment.

See the two examples of best practices below:

- For inspiration into luxury safari trips, check the products offered by [Journeys by Design](#), which include opportunities for travellers to contribute to conservation and community projects, which gives tourists a sense of purpose for their trips.
- Peru Hop offers [private city tours of Lima](#) and the archaeological site of [Huaca Pucllana](#). Personalisation enhances the unique selling points of trips, adding value to your products.

Tips:

Focus on customising your guests' experiences. Collecting information on travellers before their arrival may help in crafting unique experiences that meet their needs and wishes. For more information on how to create a product that fits what your clients expect, read our report on [how to develop your tourism product](#).

Create unique experiences by combining individual services and increasing the level of comfort. Baby boomers are looking for unique experiences, but because they are older and generally have more money than other travellers, they need more comfortable beds, silent rooms and easier transportation.

Offer 360° videos and pictures to help your guests visualise your accommodation and activities. See, for example, the [Atlantis Dubai virtual tour](#).

Multigenerational travel

According to tripping.com, multigenerational travel has become a major travel trend because it allows grandparents, children, and grandchildren to travel together and share experiences that create travel memories. Baby boomers have been exploring this type of vacation, since one of their primary reasons for travelling is to spend time with their families.

Examples of best practices in multigenerational travel include:

- Kenya's [Off the Beaten Path](#) offers [family-focused activities](#), such as visiting a local school, touring an elephant orphanage or feeding giraffes at The Giraffe Centre in Nairobi.
- [Quasar Expeditions](#) offers multigenerational vacations in jeep safaris around Patagonia.
- Home-sharing platforms such as Airbnb are known for providing [accommodation suitable for large families](#).
- Located on an island in Panama, the [Sweet Bocas](#) eco-retreat offers several activities for families.

Cruise tourism

Cruises have become a popular holiday option among baby boomers, offering them the opportunity to visit several places during one vacation. An emerging trend in the European cruise market is river cruising, which requires lower investments and are more sustainable than sea cruises. The cultural experiences on offer and the slow pace of travel on river cruises are very appealing for baby boomers.

Examples of best practices in river cruises include:

- [Pandaw river cruises](#) explore the rivers of Southeast Asia and Myanmar.
- [Aqua Expeditions](#) focuses on cruises on the Amazon River, but it also has plans to enter the Asian market of the Mekong River between Vietnam and Cambodia.

Active travel

Baby boomers are more active at ages 65 and older than the generations that came before them. For this reason, some of them prefer active holidays that may include intense hiking or trekking, for example. However, many travellers in this age group are interested in simply spending time outside observing wildlife. Another popular activity among these travellers is cycling, so many tour operators provide e-bikes for tourists.

Tips:

Start with a small-scale business focusing on exploring the authenticity of your area, and the

uniqueness of the local culture.


Read our study on opportunities in [the European cruise tourism market](#).

Read our study on [opportunities in the European multigenerational tourism market](#). Although this market offers many opportunities, it also is a hard market to supply, because of the obvious difficulty in catering to the varying demands of different generations at the same time.


This study has been carried out on behalf of CBI by [Molgo](#) and [ETFI](#).

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