



# HORIZON 2022

TO BOLDLY GO WHERE DESTINATION  
EUROPE HAS NEVER GONE BEFORE

**9<sup>TH</sup> CULTURAL ROUTES ADVISORY FORUM 2019**

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# New market segmentation

## Demographic targeting is dead

Transition from predominantly demographic to behavioural and attitudinal.



### Demographics

Age, Gender, Location

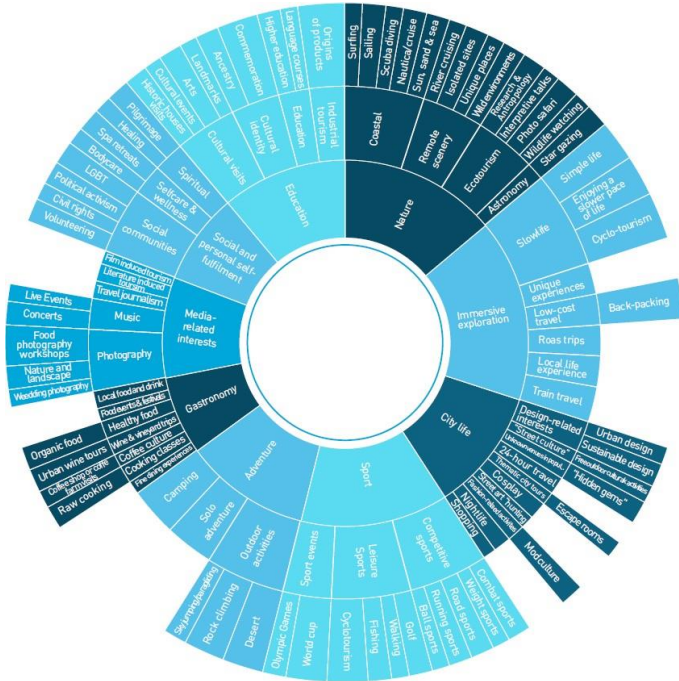


### Psychographics

Behaviours, Interests and Attitudes

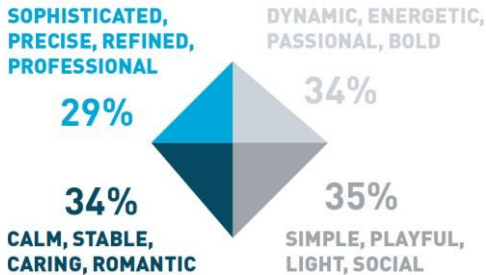
**Niche, passion-based markets**

# Mapping of passion groups

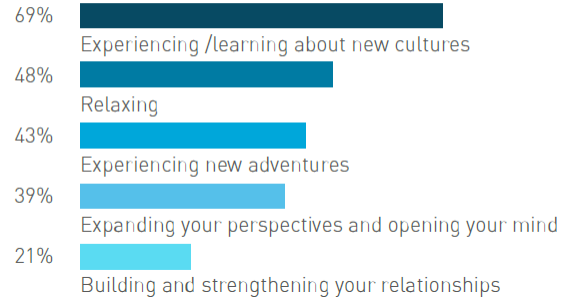


## EXPLORERS OF CULTURAL IDENTITY AND ROOTS LOVE TO LEARN ABOUT NEW CULTURES AND OFTEN COME FROM COUNTRIES WITH STRONG HISTORICAL TIES TO EUROPE

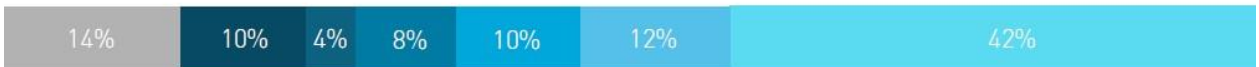
### Psychographic profiling



### TOP 5 MOTIVATIONS TO TRAVEL



### MOST ATTRACTIVE COUNTRY TO PURSUE YOUR INTEREST - REGIONAL AGGREGATE



● Other ● Asia ● Middle East ● Northern America ● Oceania ● South America ● Europe

## EXPLORERS OF CULTURAL IDENTITY AND ROOTS USUALLY OPT FOR A STAY LONGER THAN A WEEK AND PREFER TO TRAVEL IN THE SUMMER MONTHS ACCOMPANIED BY THEIR FAMILIES

### PREFERRED MONTHS TO TRAVEL



May 23%  
June 24%  
July 26%  
August 23%

### CHOICE OF ACCOMMODATION



### PREFERRED TRAVEL PARTNER



### AVERAGE LENGTH OF STAY



3-7  
nights  
20%

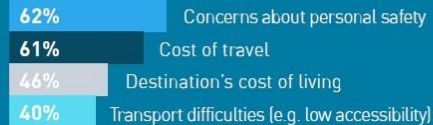


8-14  
nights  
59%



15-21  
nights  
12%

### FACTORS INFLUENCING THE CHOICE OF DESTINATION



### THE AVERAGE DAILY BUDGET per person is €170



Tourists from **Saudi Arabia, the United States and Brazil** allocate significantly higher amounts - €402, €300 and €208, respectively.

*Multiple-answer questions*

## CULTURAL EXPLORERS USE ONLINE SOURCES TO PLAN AND BOOK THEIR HOLIDAY, BUT ALSO SEEK ADVICE FROM FRIENDS AND RELATIVES

### SOURCES USED FOR TRAVEL PLANNING



The most popular online sources are **travel review websites** (e.g. Trip Advisor), **travel booking websites** and **social media**.

### THE TOP SOCIAL-MEDIA CHANNELS ARE



Facebook  
66%



Instagram  
53%



YouTube  
58%

### MOST POPULAR CHANNELS FOR BOOKING

#### FLIGHTS

Book an entire travel package through a travel agent

66%



Book directly with the airline

63%

Book via online platforms (e.g. Skyscanner)

54%

#### ACCOMMODATION

Book via online platforms (e.g. booking.com)

59%



Book directly with the accommodation provider

50%

Book via a travel agent

48%

*Multiple-answer questions*



# Strengths and weaknesses



- **Variety of passion-related experiences**
- **Hospitality and communication with locals**
- **Cultural and leisure offer**

- **Value for money of the experiences related to corresponding interest**