



## Senior travel from Europe

Europe's growing senior citizen population makes this a promising source market. Seniors are healthier and wealthier than previous generations and are more flexible in terms of travel periods than other groups. They are especially interested in experience holidays that combine nature, culture, soft adventure activities and encounters with locals. The interest of seniors in derived products such as spa and wellness treatments is also expected to increase.

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## 1 . Product description

Across Europe, the share of seniors among the population is growing significantly. In this study, 'senior' refers to people over 65 years of age (who are mostly retired). These [senior tourists account for more than 20% of European leisure travel](#), illustrating the importance of this group.

### Health and safety measures

Health and safety are particularly important to European senior tourists. At home they are generally used to high safety and security standards and they expect the same level when travelling. The importance they attach to safety tends to increase as they grow older.

Like most European tourists, senior tourists often inquire about the safety of their destination. Especially safe driving can be a concern. They want to know the qualifications of their drivers and how/when the equipment is tested. Unclean rooms and a lack of (or faulty) smoke detectors are an annoyance at the destination. This might result in bad reviews after the holiday.

### Tips:

- Pay attention to general safety measures. For example, tour operators should check

vehicles and equipment regularly and hire experienced guides who know the area well. Accommodation establishments should have safety measures in place, such as smoke detectors, fire extinguishers, emergency exits, first-aid kits and 24-hour medical assistance.

- Show the outcomes of safety checks and licences to your clients.

## Political stability

Safety is important to European tourists, especially because some developing countries are politically unstable. Senior tourists tend to avoid unsafe areas, such as areas with political unrest. Most commercial tour operators don't offer holidays to countries that their Ministry of Foreign Affairs has declared unsafe. This has previously led to a drop in tourism arrivals in countries such as Mali, Egypt and Kenya.

### Tips:

- Keep potential customers updated on changes in the safety situation in your area. You can do so through your website and your staff, for example. Be open and honest in your communication: explain which areas are safe or where safety might be an issue. Your customer has plenty of information sources too.
- Share safety experiences from customers on your website. Let them write about how safe they felt, because tourists value the experience of other travellers.
- If your region is 'unsafe', commercial tour operators will most probably not go there. In this case, focus on volunteer organisations and individual travellers. Check your country's current safety status at the website of the Ministries of Foreign Affairs of your target countries ([Ireland](#) and the [United Kingdom](#), for example).

## Unique experiences

Today's senior tourists are more experience-driven than previous generations. They like to be active, learn, discover and enjoy new experiences. Another key to engaging senior tourists is to appeal to their senses. They tend to find a travel experience that incorporates taste, touch, smell and/or sound more memorable.

### Tips:

- Offer unique experiences, for instance by combining adventure, nature and culture with educational components and contact with locals. For example, a cultural walking tour that includes a visit to a local community.
- Engage senior tourists in the lives of local seniors; let them interact with locals.
- Include culinary components, visual arts or musical elements to help create unforgettable experiences.

## High levels of quality

European seniors are more experienced and more sophisticated tourists than previous generations. They tend to be increasingly quality-conscious and demanding. Examples of quality requirements for tourism services providers are personalised and 24/7 services, friendly staff, clean, secure and well-maintained facilities, comfortable rooms and beds, and varied and healthy meals.

### Tip:

- Take the quality requirements of senior tourists into account in your product development. Other travel groups also value many of these requirements, which is an extra advantage.

## Good accessibility

Older tourists generally have higher demands in terms of accessibility than other demographic segments. This is because they generally have more minor disabilities. Seniors with mobility limitations, for example, actively seek hotels with ramps and lifts.

### Tips:

- Accommodation providers should provide facilities for seniors, such as ramps and handlebars in toilets, ground floor rooms, lifts and assistance with luggage. Provide information regarding these facilities, but do not generalise. Visit Britain provides some [simple, low-cost changes to benefit you and your visitors](#).
- Tour operators should include transfers in their product offering, such as door-to-door transport.
- For more information, see our study on [accessible tourism](#).

## Medical facilities

Health concerns are likely to increase with age. Senior tourists often inquire about the availability of medical facilities at their holiday destination. This information will make them feel more secure about travelling away from local health services.

### Tips:

- Make sure that information about healthcare and medical emergencies is readily available for both senior tourists and tour operators.
- Have 24/7 English-speaking medical assistance available, as well as basic medical equipment such as first-aid kits.
- Use the available medical provisions to promote your product among senior tourists. For example, Kenya and Tanzania have a flying doctor service for both locals and tourists. They use this in their marketing to reassure tourists about medical care.

## Package travel

Senior tourists are keener on package travel than younger age groups. The main reason for them to choose a package holiday is that they find package tours more reliable. Many senior tourists require detailed information. They want a structured schedule that tells them what they are going to do and when. They also generally prefer to travel in groups of 20-25 persons, as they like to meet other people and feel more secure in a group.

### Tips:

- Partner with European tour operators who can sell your products/packages for you. They know their customers very well and can help you to fine-tune your products.
- Offer package tours with flexible modules that enable seniors to compose a package according to their own needs and preferences.
- Offer a detailed description of your product/itinerary.

## Language

Tourism services providers are expected to have good English language skills. Depending on their European home country, some senior tourists prefer to have guides that speak their own language. This also increases their trust in you. German senior tourists, for example, strongly prefer German-speaking guides.

### Tips:

- Make sure that local guides have good English language skills.
- Explore the possibility of offering guides that speak the language of your European target market.

## Traveller profile

European senior tourists generally:

- are more willing to spend money on travel
- are looking for new experiences and are willing to pay a higher price for them
- are able to enjoy longer holidays as they have fewer work or family commitments
- prefer to travel outside of the peak season, saving money and avoiding crowds
- spend more time planning their trip than younger age groups
- frequently use word-of-mouth information to make decisions
- use more traditional media than younger travellers, such as newspapers and television

However, needs and motivations may differ among European senior tourists. Where some travel for rest and relaxation, others travel to undertake physical activities or to learn about other cultures.

### Tips:

- Target senior tourists to extend seasons and create a more stable income.
- Use both online and traditional media, like newspapers, television and magazines for

seniors.

- Develop specific niche products for the senior travel market, such as cycling, culture, wellness, cruises or culinary tourism.
- Offer flexible travel packages that contain optional modules with different types of activities and accommodation, at different price and comfort levels.

## Longer seasons and longer trips

Because senior tourists aren't necessarily bound to school holidays, their travel seasons are longer than those of younger tourists. While younger tourists mainly travel during the peak seasons in July-August and December, [European seniors do most of their travelling in the 'shoulder seasons'](#) from March to June and from September to November. Around 40% of overnight stays spent by European senior tourists are in May-June and September, considerably extending the peak summer season.

In addition, European senior tourists generally take longer trips than younger age groups (seven versus five nights). Although this can partly be explained by the fact that they are more likely to travel within their country and/or stay at a holiday home they own, this is a considerable difference.

### Tips:

- If you wish to extend your peak summer season, target senior tourists.
- Offer attractive deals and itineraries for senior tourists, especially outside of the peak seasons.

## 2 . Which European markets offer opportunities for senior citizen tourism?

The number of seniors is increasing rapidly

[About a fifth of the European population is 65+](#), amounting to nearly 100 million seniors. Between 2007 and 2017, this share increased by 2.4%. This development is projected to continue over the next few decades.

### Senior participation in tourism

[Around half of all European seniors participate in tourism](#), compared to 62%-69% of younger age groups. Of these European senior travellers, almost half take at least one international trip per year. Among those not participating, health reasons are the most reported reason to stay at home.

Among European senior tourists, [those aged between 65 and 74 travel relatively much](#). This segment is responsible for 15% of European leisure tourism nights, while making up 12% of the population. For tourists aged 75+ the opposite is true: they make up 11% of the population but generated only 7.0% of European leisure tourism nights. This is most likely due to health reasons increasing with age.

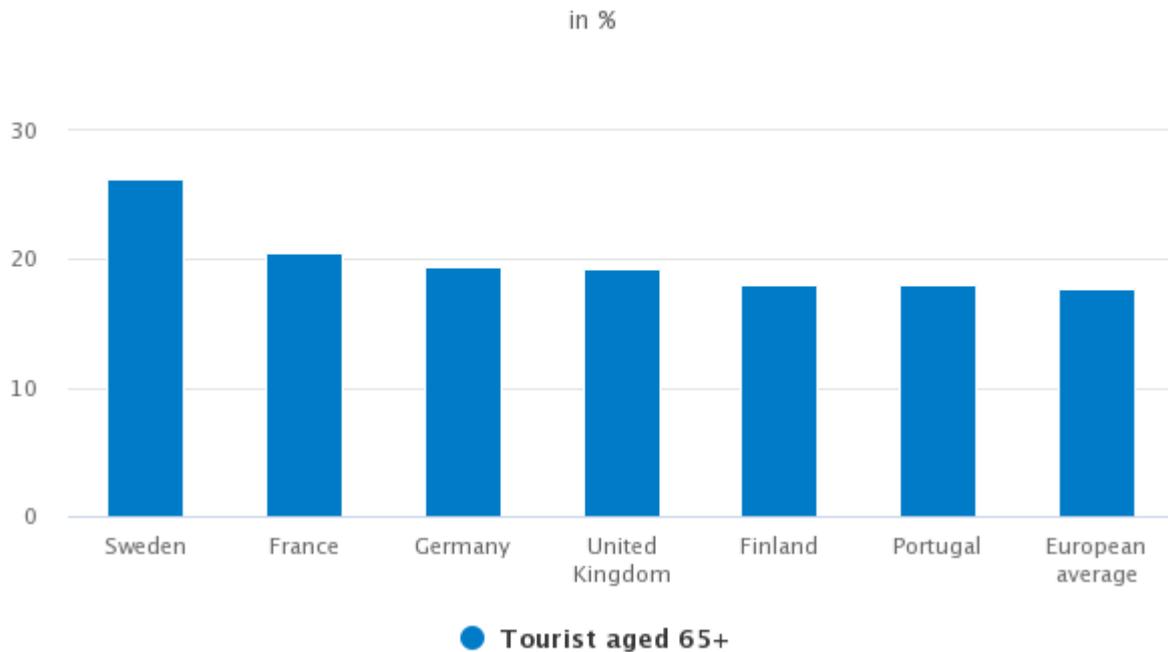
### Tips:

- Focus on 65 to 74-year-old European senior tourists in particular.

- If you choose to include tourists aged 75+, make sure to increase your comfort levels and medical provisions accordingly.

## Northern and Western Europe are promising markets

Figure 1: Share of travellers aged 65+ in the tourist population per country 2014\*



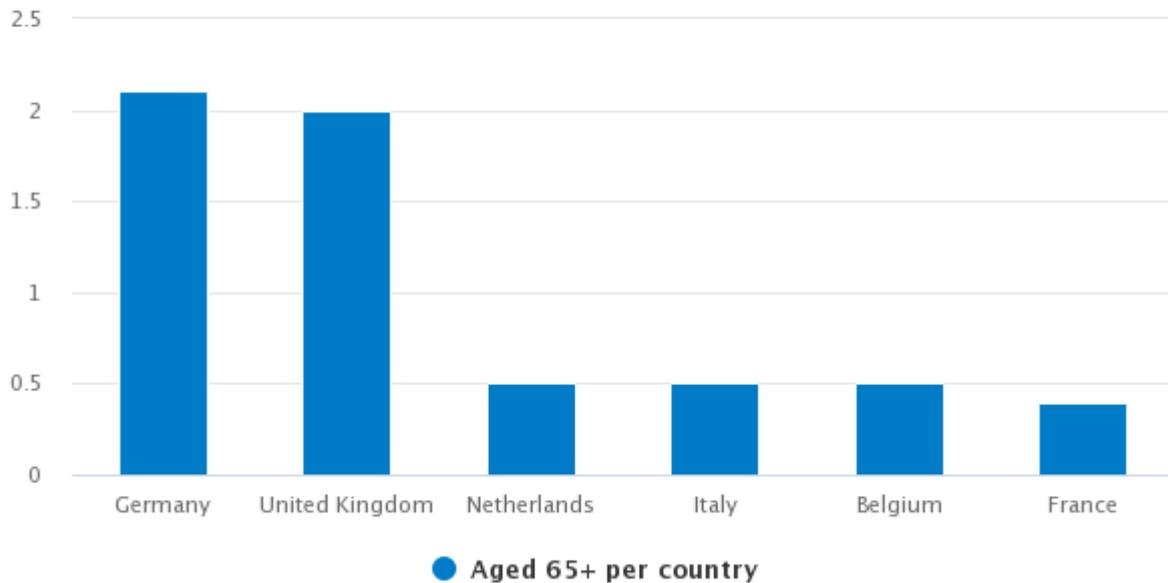
Source: Eurostat

\* Update planned for 2020.

Senior citizen tourism participation varies considerably across Europe. It is particularly high in Nordic countries like Sweden and the large Western European markets. In most Eastern European markets however, relatively few seniors travel. The share of senior tourists is below 10% in Bulgaria, Lithuania and Slovakia, while the share of seniors in the populations of these countries is 16-23%.

Figure 2: Number of tourists aged 65+ per country

in million



Source: Eurostat

The diagram shows that the market is largest in Germany and the United Kingdom, with more than 2 million senior tourists each, followed by the Netherlands, Italy and Belgium with around half a million senior tourists each.

### Tip:

- Focus on Northern and Western European countries, as the participation of seniors in tourism is relatively high there. Germany and the United Kingdom are particularly interesting.

## Senior citizen incomes are highest in smaller markets



Seniors in Northern and Western European markets generally have higher incomes than those in Southern and Eastern Europe. Especially in smaller markets such as Luxembourg, Switzerland and Norway, the average senior income is considerably higher. This makes seniors in these markets more likely to be able to afford long-haul travel. Their tourism expenditure is also expected to be higher.

Switzerland, Denmark, France and Austria are particularly interesting. With around 300 thousand to 400 thousand senior tourists each (in 2014) and a relatively high average senior income, these source markets have good potential for senior citizen tourism. Unfortunately, Norway's senior citizen tourism participation rates are unavailable for comparison.

### Tips:

- Consider targeting seniors in smaller European markets with relatively high senior citizen incomes as well.

- Study your options in Switzerland, Denmark, France and Austria.

For more statistics on European source markets and destination countries, see our study about [European demand for tourism in developing countries](#).

### 3 . What trends offer opportunities on the European market for senior citizen tourism?

#### Growing demand for health and wellness tourism

Demand for health and wellness tourism among European seniors is expected to grow strongly in the coming years. This is a result of the ageing population and rising costs of health treatment and insurance in their home countries. There are three major driving forces behind this growth: saving time (because of waiting lists in the country of origin), saving money (if treatment costs are lower abroad) and the unavailability of treatments in the country of origin.

Not all treatments are medically necessary. Some seniors also want to undergo light (non-invasive) medical surgery, such as Botox treatments. India is a leading destination for health and wellness tourism. It has highly educated medical professionals, it is cheap, treatments are often covered by insurance and there are no waiting lists. Eastern European countries such as Romania and Hungary are also popular.

#### Tips:

- Develop health and wellness tourism packages for seniors. For example, combine spa or (light) medical treatments with accommodation, activities and transfers. Also offer partner packages, as most health and wellness tourists travel in pairs.
- Offer competitive prices for health and wellness tourism. Travelling to your destination for a health or wellness treatment should be worthwhile in terms of cost savings.
- If you don't want to specialise in health and wellness tourism, compose packages for seniors with optional health and wellness modules.

#### Seniors are looking for more adventurous holidays

European seniors are healthier than ever and have a more active lifestyle than previous generations. This is also reflected in their holidays. They are increasingly interested in soft adventure activities: light physical activities combined with interaction with nature or cultural learning. Examples of soft adventure activities are hiking, cycling and snorkelling. This trend is expected to continue in the coming years.

#### Tips:

- Include optional light physical activities in your packages for senior tourists such as walking, hiking or cycling tours. Also offer enrichments like archaeology, history or culture.
- Make sure your adventurous tours and activities are suitable for senior tourists, but don't patronise them. For example, offer comfortable seats and/or regular breaks. Also make sure your guides are medically trained to provide first aid care if necessary.

## Family travel

Families increasingly go on holidays together. Within this trend, multi-generational travel with grandparents, parents and children is also becoming more and more common.

Traditionally, most families used to stay in one resort or destination within their own country or within Europe. Nowadays, families are looking for more adventurous holiday activities further away that they can share and enjoy together, such as going on a safari. Increasingly popular long-haul destinations for family travel include Borneo, Costa Rica, Morocco, Sri Lanka and Thailand.

### Tips:

- Adapt your product to accommodate travel by multiple generations. For example, accommodation providers could offer family rooms and organise entertainment for children, parents and grandparents. Tour operators could develop family-friendly travel packages.
- Demonstrate your understanding of the diverse needs of multi-generation parties in your marketing activities.
- For more information, see our study on [explorative tourism by families with children](#).

## Increasing use of online research

European senior tourists increasingly research and plan their trip online. [24% of European 65 to 74-year-olds used the Internet for travel and accommodation services in 2017](#), compared to 9% in 2007. In Northern and Western European markets this share is considerably higher, up to 66% in Luxembourg. This is expected to increase further.

To gather information and share experiences, seniors use:

- peer review sites, like [TripAdvisor](#) and [Zoover](#)
- travel forums, like Lonely Planet's [Thorn Tree forum](#) or TripAdvisor's [Senior Travel Forum](#)
- [social media](#), like [Facebook](#)

### Tips:

- Maintain a strong Internet presence and online marketing strategy, including on Facebook.
- Use photos and videos to bring your story alive. For more information, watch this [webinar series on visual communication in adventure travel](#) by the Adventure Travel Trade Association (ATTA) and Libris.
- Use current customers as ambassadors for your company and area. Encourage them to share their experiences and visuals on Facebook, write blogs and review your company.
- For more information, see our [10 tips for online success with your tourism company](#).

For more information, see our study about [European tourism market trends](#).

## 4 . What requirements should senior citizen tourism comply with to be allowed on the European market?

For general tourism requirements, see our study on [what requirements your services should comply with to attract European tourists](#).

In addition, there are some voluntary standards for the more adventurous kinds of senior citizen tourism.

### Voluntary adventure tourism safety standards

For more adventurous experiences, three ISO standards support safe adventure practices: [21101](#), [21102](#) and [21103](#). Additionally, some countries have their own voluntary standards. For instance, [BS 8848](#) in the United Kingdom.

#### Tips:

- Study the ISO standards on adventure tourism. Use them to enhance your safety performance.
- Check for possible voluntary standards in your target markets.

## 5 . What competition do you face on the European market for senior citizen tourism?

Developing countries in Asia are the most popular among European tourists, with a 52% market share. Turkey is the leading developing country destination by far. It is also a popular destination among seniors, both because of its sun and beaches and because of its rich history, culture and nature. Other popular developing country destinations for European seniors are Thailand and Bali (Indonesia).

In their search for new experiences, European seniors are expected to increasingly visit less known developing country destinations. For example, industry experts have noticed a growing interest among senior tourists in Latin American countries. Long-haul destinations are especially popular during the winter period, as many European seniors want to escape the cold weather at home.

#### Tips:

- Intensify your promotion for the winter period.
- Add sun and beach modules to travel packages as an add-on. Senior tourists from countries with cold winter months especially appreciate this.
- In your marketing activities, highlight the unique, authentic experiences that senior tourists will obtain with your product offering. Differentiate this experience from the experiences they can find elsewhere to distinguish yourself from competitors.
- Join forces with other tourism stakeholders in your country. Positive country branding is key to increase awareness of your destination, so you need to involve both your local public and private sectors.

For more information, see our study on [what competition you face on the European outbound tourism market](#).

## 6 . Through what channels can you get your senior citizen tourism products on the European market?

### Selecting smaller specialised tour operators

Smaller European tour operators specialised in senior citizen tourism or your destination offer the best opportunities.

You can identify relevant tour operators via trade associations, events and databases, such as:

- [ECTAA](#) - national associations of travel agents and tour operators per European country.
- [ITB](#) - annual tourist trade event, March, Berlin.
- [Top Resa](#) - annual tourist trade event, September, Paris.
- [World Travel Market](#) - annual tourist trade event, November, London.

Examples of tour operators specialised in senior citizen tourism are [Tour Vital](#) (Germany) and [Saga](#) (United Kingdom).

### Senior clubs

Some European senior tourists are members of senior clubs or communities. These clubs may offer trips for their members and can therefore be an interesting trade channel. An example of a senior community is [Age UK](#), an online community for British senior citizens, with a section dedicated to travel and lifestyle. There are also special interest organisations, such as various [European senior golf associations](#).

#### Tips:

- Use senior citizen clubs to promote your product.
- Advertise in magazines or on websites dedicated to seniors.

### Generating direct sales

European senior tourists increasingly book their holidays directly with service providers at the destination. To increase your chances of direct sales, you can promote your product on (senior) tourism websites/portals.

For instance:

- [Getting On Travel](#)
- [Senior Travel Expert](#)
- [Silver Travel Advisor](#)

For an overview of the trade structure for tourism, see our study on [the channels and segments of the European tourism market](#).

## 7 . What are the end market prices for senior citizen tourism products?

Tourists have many destinations and types of holiday to choose from. This makes tourism a relatively price-sensitive and competitive industry. The price of a long- haul trip is determined by three factors:

1. The exchange rate between the currency of the country of origin and that of the destination

country.

2. The costs of transport to and from the destination country.
3. The price of goods and services the tourist consumes in the destination country.

European tour operators are not open about the purchasing prices of their tourism products. According to industry experts, their margins vary between 10% and 25%. Prices of holiday packages vary widely as they depend on a lot of factors, such as:

- availability
- destination
- modes of transport
- travel period
- number of travellers
- length of stay
- type of accommodation
- activities included

### Tips:

- Check which countries have cheap direct flights to your destination, for instance at [Skyscanner](#). This gives you a competitive advantage in those countries.
- You can compare prices for senior citizen tourism products via portals like [Silver Travel Advisor](#).

Tourism Council WA has some useful [on-line tools for pricing tours and accommodation](#). These help you determine the break-even point and ideal retail price of your tourism product.

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