

Driving Factors for Tourism

The emerging market of the elderly

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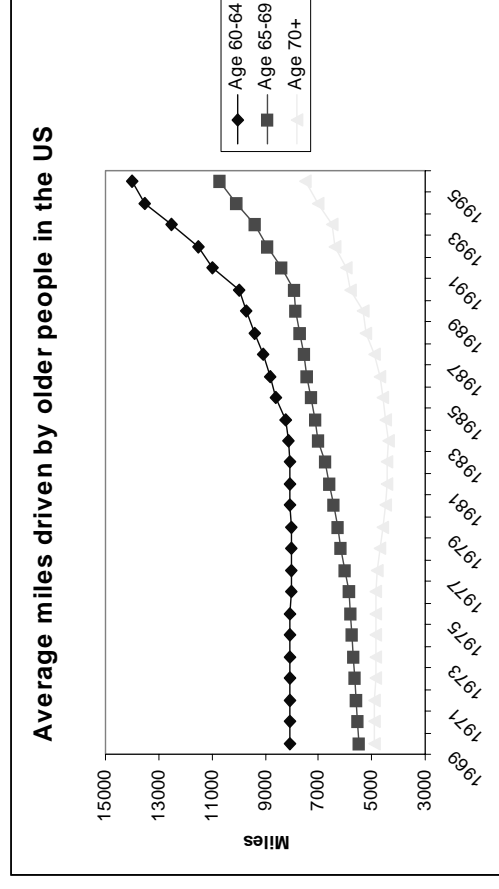
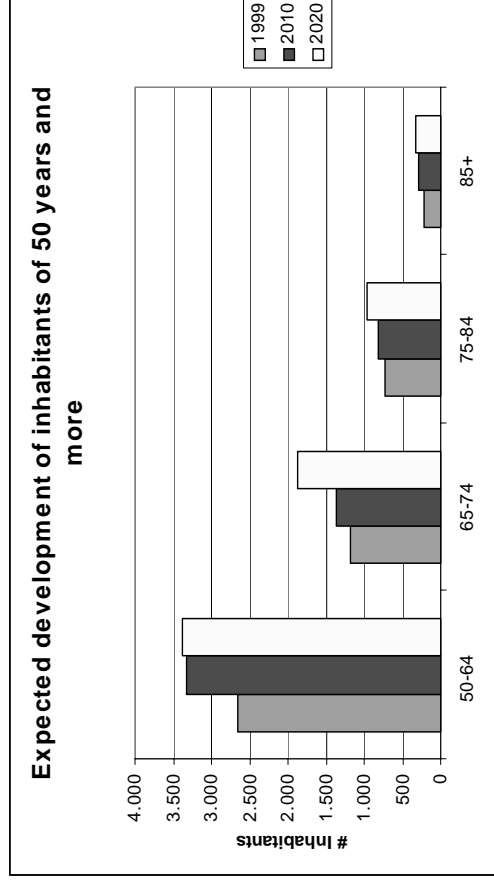
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The future senior

- **In 2020 40% of Dutch population is 50 years of older**
- **Higher welfare level**
- **Healthy**
- **Increasing car dependency**
- **Much unknown:**
 - Housing location?
 - How will they spend their time?
 - Behavioral change?
- **The senior goes on vacation, but where and how?**



Research into the future market of senior tourism

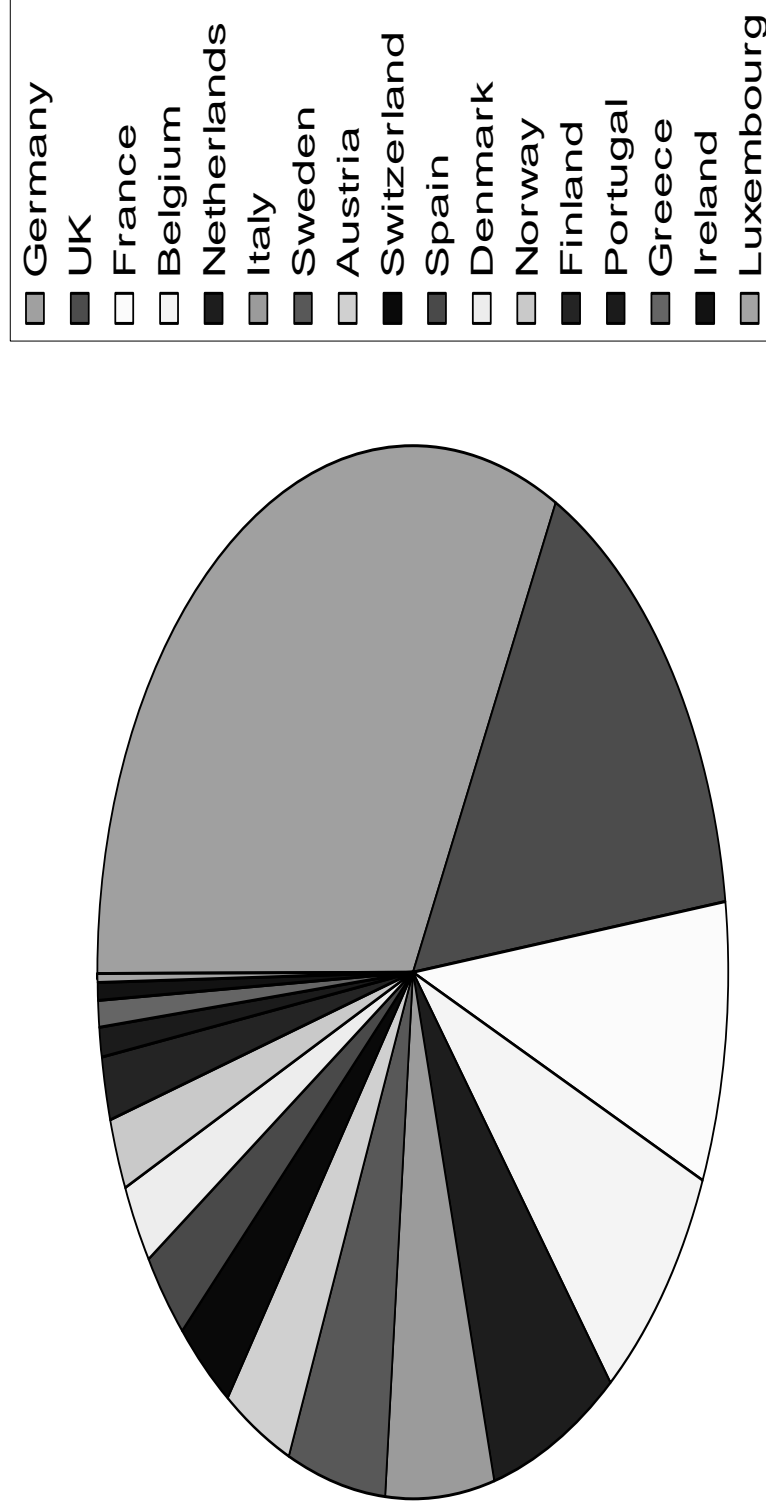
- **Background**
 - Dutch tourism industry is not prepared on specific needs of senior tourism
 - What kind of services/products should be offered
 - Netherlands Board of Tourism asked TNO to investigate the potential of the elderly tourist niche market
- **Use of several existing surveys**
- **We used the TOERMODEL forecasts expenditures of foreign and Dutch tourists for the NL**
- **Econometric model**
- **Study was performed in 2000**

Characteristics of the European senior (55+) on vacation

- **Several times a year**
 - Age group 55-59: 2.4 holiday trip a year
 - Age group > 75 years: 1.3 times a year
- **International trips: 0.45 per year**
- **Journey time on average 10,4 days (average 12.4)**
- **in July, August, September and in spring**
- **60% travels with partner**
- **Pre-booking**
- **Two-third sleeps in middle and high-class hotels**
- **On average same spending (€2000 per holiday)**

**25% of all holiday trips are international trips
5 countries (Germany, UK , France, Belgium and the
NL) account for 71% of all international holiday travel**

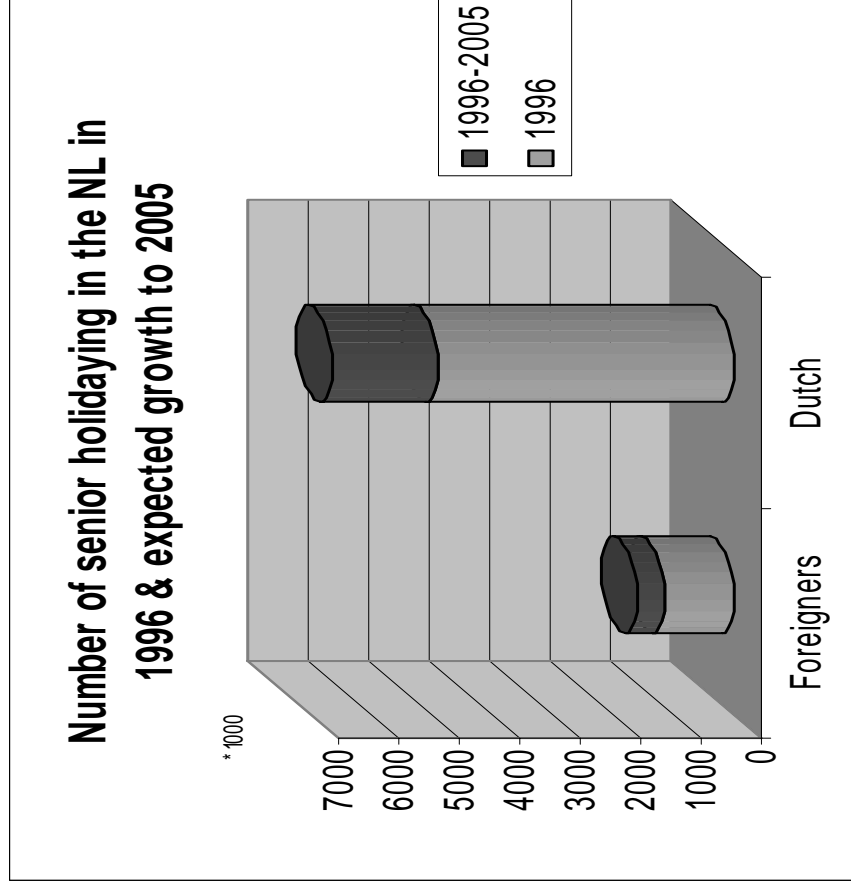
International travel by European seniors



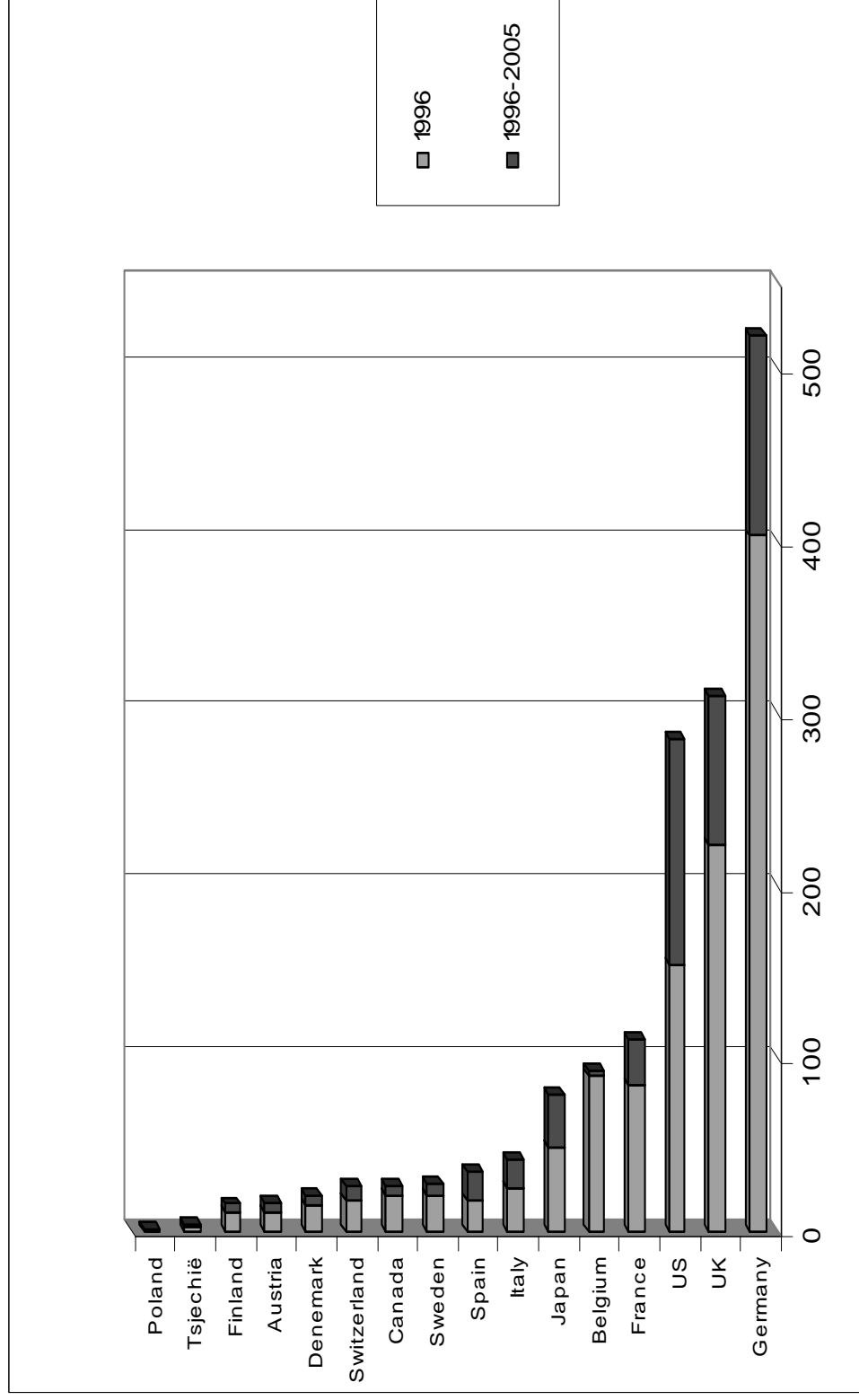
The market within the Netherlands

- Dutch Seniors account for 10 million holidays per year, approximately two-third were taken in the NL
- **Growing market:**
 - Since 1987 onwards strong growth
 - Growth of national trips stronger than international trips
 - Total market grows with 36% (1996-2005)

- **Share of foreign seniors on Dutch market is 19% and rising (21% in 2005)**



Number of foreign senior citizens visiting the Netherlands in 1996 & expected growth to 2005:



How to prepare (or make use of) this emerging market

- **The senior tourist doesn't exist. Four phases:**
 - Phase 1: No children on the holiday
 - Phase 2: Retiring turns the time factor on its head
 - Phase 3: Sickness and ill health become a limiting factor
 - Phase 4: Loss of partner influences travel behavior
- **Seniors do not want to be seen as old and different to younger tourists**
- **For the tourism industry the senior market offers great opportunities**

Conclusions & Challenges

- **Tourism demand of the future has to deal with the needs of the elderly.**
- **Senior market is the fastest growing market within tourism (more volume & more buying power)**
- **Social challenges:**
 - How to stimulate sustainable behavior?
 - Impact on transport flows??
 - Increasing car use on long distance
 - Competition air, rail car