



EUROPEAN COMMISSION  
ENTERPRISE AND INDUSTRY DIRECTORATE-GENERAL

Service Industries  
Tourism Policy

# “Europe, the best destination for seniors”

## “Facilitating cooperation mechanisms to increase senior tourists’ travels, within Europe and from third countries, in the low and medium seasons”

### Draft report

*This Report is the outcome of a brainstorming exercise with a pool of experts representing main EU senior tourism stakeholders, aiming at developing low and medium seasons tourism flows for this segment at European level. The objective is only to set up the framework for further recommendations. No binding commitment has to be undertaken from this Report.*

#### 1. INTRODUCTION

All European countries are facing a similar demographic trend<sup>1</sup>. The *Baby Boom* generation is reaching the oldest age bands and the share of the elderly is significantly increasing. Currently more than 128 million citizens in the European Union are aged between 55 and 80 years, representing about 25% of the total population<sup>2</sup>. This demographic development is having a considerable impact on the increase of the tourism demand. Consequently, it is necessary – for both the public authorities and the private sector - to design medium and long-term strategies to anticipate and react upon in the most competitive way.

<sup>1</sup> This particular trend is a constant worldwide, The 60+ age band is expected to reach 1.3 billion people by 2030, an increase of 600 million units from 2010. The share will move up to 16% from 11% in 2010 -UN Department of Economic and Social Affairs, *World Population Prospects: The 2012 Revision-* (see Annex I)

<sup>2</sup> [http://epp.eurostat.ec.europa.eu/statistics\\_explained/index.php/Population\\_structure\\_and\\_ageing](http://epp.eurostat.ec.europa.eu/statistics_explained/index.php/Population_structure_and_ageing)

Approximately 41% of European citizens in the 28 Member States have never travelled outside their national borders while 7 out of 10 seniors undertake exclusively domestic trips. This situation could be inverted by undertaking actions involving public administrations, industry and civil society at European level, with a view to facilitating and promoting senior tourists' travels between European countries and also from third countries to Europe, in particular during the low and medium seasons. Thus, there is a huge potential on increasing productivity on tourism infrastructures and resources.

Developing the initiative “**Europe, the best destination for seniors**” is in line with the Communication “*Europe, the world's No 1 tourist destination a new political framework for tourism in Europe*”<sup>3</sup> and by the strengthening – as explained in the present Report - the competitiveness of the tourism sector will also contribute to the objectives of the Europe Strategy 2020<sup>4</sup>.

Moreover, this initiative will positively:

- Encourage **economic growth**;
- Stimulate the creation of **longer-lasting employment opportunities** in the tourism sector, by making it possible to extend jobs beyond the respective peak seasons;
- Capitalise Europe as a **safe and secure destination**, where riskless free movement is a very important asset for seniors;
- Increase seniors' **wellbeing and quality of life**;
- Enhance the **European citizenship** and common identity;
- And in particular, **extend the tourism season** in European countries.

Indeed, tackling the issue of seasonality is a constant challenge for the European tourism. The distribution of nights spent in the 28 Member States by foreign tourists in 2012 presents a significant high concentration during the central months of the year, with a peak season in July-August accounting for 33% of all nights in one average year. As an overall EU average, two medium seasons in May-June and September-October account respectively for 20% and 18% and two low seasons in November-December and January-February concentrate merely 4% to 5%, with only a few notable exceptions among Member States (e.g. Austria as a winter sport destination). The comparative analysis of seasonality across the EU leads to identifying seasons which are low for all Member States. Actions aimed at reducing seasonality would thus be in the benefit of the EU as a whole<sup>5</sup>.

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<sup>3</sup> COM (2010) 352 final – 30.06.2010 [http://ec.europa.eu/enterprise/sectors/tourism/files/communications/communication2010\\_en.pdf](http://ec.europa.eu/enterprise/sectors/tourism/files/communications/communication2010_en.pdf)

<sup>4</sup> COM(2010) 2020 final - 3.3.2010 <http://eurlex.europa.eu/LexUriServ/LexUriServ.do?uri=COM:2010:2020:FIN:EN:PDF> - Facilitating tourism flows of senior tourists would stimulate one of the main objectives of the European Strategy 2020, facing the problem of unemployment, by alleviating the inactivity of tourism infrastructures and professionals during long periods. Indeed, the potential of the tourism industry is only used at 50% or 60% of its total capacity (according to the National Institute for Tourism Statistics (IET) “Spain in Europe. Tourism Behaviour of EU Residents”) and tourism GDP could be increased by 25% minimum without expanding plant capacity.

<sup>5</sup> The difference between peak and low seasons (282 million nights) gives an idea of both the importance of the issue of seasonality for EU28 and the effort that needs to be done to level out seasons.

Seasonality impacts negatively a destination's economic fabric, as well as its socio-cultural and ecological environment. From a microeconomic perspective, the major problem is linked to the underutilization of facilities which results in a loss of profits and investments. This is especially relevant for the accommodation sector, for which short-term responses to changes in the demand level are difficult to put into action. From a macroeconomic perspective, congestion of primary/mainstream public places and infrastructure are the most frequent drawbacks. The tourism supply need to adapt business operations to seasonal variations is reflected in the creation of short-term and precarious jobs, with consequent increases in unemployment during the off season. Lastly, seasonality also implies a negative impact on the demand side (e.g. negative externalities on the environment, caused by the pressures on existing infrastructure or the use of environment and natural resources during peak periods).

The great potential of the senior target group soothing the negative impacts of seasonality will be better explained in the next chapter.

## **2. THE PURPOSES OF THE REPORT**

This Report is intended to be a practical document providing existing knowledge base of the senior tourism market, with a particular emphasis on the seniors' main characteristics, the tourism product development, the opportunities offered by thirds markets, along with the governance and financing opportunities. Different gaps in areas and studies which need to be better analysed are also highlighted.

The Report's overall objective is to set up recommendations for strategic actions, supporting European coordination and promotion mechanisms to facilitate and increase low and medium season flows of senior tourists, within Europe and from third countries, identifying the role that different actors might play in their implementation.

These recommendations are addressed to public authorities and institutions (governments, tourism organisations, tourism promotion agencies, etc...) the industry and private stakeholders of the tourism sector (tourism promotion agencies, tourism business associations, senior organisations...) but also to other stakeholders who can contribute to the strategic development of the senior market segment at national, regional or destination level. Nonetheless, the Report may also be useful for individuals and enterprises operating in the tourism sector and willing to contribute to the development of this market segment.

More generally one of the strategic objectives of this report is also to bring tools for decision-making process enabling the implementation of adequate, affordable and sustainable solutions for the benefit of users but also institutions in charge of elderly issues (DG CONNECT).

The Commission services have prepared this Report with the support of a pool of experts with and extended experience in senior tourism, as a result of a long-lasting preparatory work and a number of different initiatives.

Since 2009, the Commission has been deploying efforts to relieve the pressure in peak periods and extend the tourism season. Through the Calypso initiative<sup>6</sup>, it facilitated transnational exchanges in the tourist low seasons for specific disadvantaged target groups<sup>7</sup>.

From 2012, the Commission has focused more extensively on the senior group (Calypso+). In May 2012, Vice President Antonio Tajani asked the EU Ministers in charge of tourism for their support of an ambitious action for encouraging senior citizens to travel in Europe. As a result, two workshops were held in Brussels with EU Member States and the industry to gather ideas on how to reinforce the promotion of senior tourism in Europe and attract senior tourism from third countries. Consequently, in June 2013 it launched the first Call for Proposals dedicated to senior tourism and will co-fund during 18 months the implementation of 4 projects from September 2014, setting up and/or strengthening public and private partnerships at European, national and/or regional levels, with a view to facilitating transnational tourism exchanges for seniors in the low season within Europe.

Moreover, following a public questionnaire<sup>8</sup> launched in September 2013 addressed to the main stakeholders across Europe, covering 23 Member States, Turkey and 6 EU Associations, more than 95% of the respondents expressed their willingness to participate in a common European programme to increase senior travel flows. Similarly, up to 305 stakeholders had responded to the survey "*A vision for the future of tourism*" which ran from 6 December 2012 until 21 March 2014. The analysis of the results shows that seasonality appears to be one of the 4 main causes of negative economic impacts on the tourism industry. Indeed, repositioning senior tourism appeared as main opportunity for businesses so senior tourism could be a positive response to seasonality negative effects.

The overall result of these activities clearly shows a broad consensus in EU Member States to support the initiative of fostering senior tourism. Indeed, some Member States are already active in this field, while others are ready to take action. It is therefore necessary to pursue the efforts and to engage tourism authorities and stakeholders, both at national, regional and private level, towards stronger and more concrete public-private partnership initiatives.

On this basis, a strong commitment –revealing an active participation in different workshops and the contributions of the pool of experts above mentioned- has been made by several stakeholders representing the public and private sector to support the flagship initiative, "*Europe, the Best Destination for Seniors*", by building upon actions undertaken at transnational, national and regional levels, as well as by facilitating the exchange of good practices between public and private stakeholders.

As an Annex to the Report, an Action Plan illustrates 4 sets of actions to be undertaken in the medium (up to 2016) and long term (up to 2020) in order to reach two concrete objectives:

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<sup>6</sup> During its three-year period as a Parliamentary Preparatory Action (2009-2011) and one additional year under the CIP Program (2012), the Commission co-financed 9 projects, a study, and supported the creation of a web platform ([www.ecalypso.eu](http://www.ecalypso.eu)), which facilitates the match of demand and supply in all the Calypso target groups, enhancing a tourism for all. More information about Calypso at: [http://ec.europa.eu/enterprise/sectors/tourism/CALYPSO/index\\_en.htm](http://ec.europa.eu/enterprise/sectors/tourism/CALYPSO/index_en.htm)

<sup>7</sup> seniors, youth, people with disabilities, families with low income

<sup>8</sup> The questionnaire addressed Member States, the industry, as well as associations, federations and other organisations working in the senior field, aiming at mapping existing actions and projects for senior tourists and assessing whether possible transfers or take up of these projects could be used to increase senior tourism flows at a larger scale, underlying some good practices and key elements for success.

- (1) The first concrete objective will be to **increase the volume of cross-border trips** undertaken by seniors during the low and medium seasons in all EU Member States, by 10% by 2020. In this sense, the growth rate for the cross-border/transnational tourists' trips undertaken during the low and medium seasons should be higher than the growth rate for trips undertaken during the peak season.
- (2) The second concrete objective will be to **reduce the degree of seasonality in all EU Member States until 2020**. In this sense, monthly cross-border/transnational tourists' trips should be more equally distributed across seasons.

### **3. SENIORS TOURISM MARKET: REALITY, OBSTACLES, CHALLENGES AND GOOD PRACTICES**

For the purpose of this Report, “seniors” are meant in a broader sense and refer to persons over the age of 55 years (inclusive).

All over the world, societies are rapidly changing, shaped by declining fertility rates, the lengthening of life expectancy, urbanization and migration. The rise of the “silver economy” will generate a non-negligible impact on world societies/economies”. Such an unprecedented demographic change poses new economic, political and regulatory challenges that affect the society as a whole. In the tourism sector, demographic changes primarily impact on the characteristics and relative importance of travel segments, with a domino effect on the types of tourism products, services and the activities seniors engage in while away from home. Along with challenges, demographic change will also bring new opportunities for the tourism sector.

In general, seniors in retirement ages have more spare time and are willing to spend it on tourism. It is commonly accepted that they are often healthier and wealthier than in previous generations in many European countries; in general, researches show an increase in savings and assets with fewer financial commitments, especially in the early years of retirement. They tend to be increasingly quality conscious and demanding, particularly committed with safety, responsible and sustainable services and infrastructures. Nevertheless, there are also seniors with less purchasing power and seniors with health problems. In fact, seniors are rather a heterogeneous group of individuals with different needs and motivations. As underlined in the introduction, data show clearly that only 3 out of 10 senior European citizens travel abroad. Therefore there is clearly a high potential for increasing the number of travels undertaken by this segment of the market.

More significantly, seniors are more flexible in travel patterns and off-peak seasons offer advantages that appeal senior travellers, such as less congested facilities and lower prices. Indicators suggest that Europe shows the highest potential as source of senior travellers, due to the volume of its elderly population and the increasing penetration of travel among them<sup>9</sup>. Hence, senior tourism offers a great opportunity to overcome the negative impacts of seasonality, provided that they are offered what they look for and what they need. Therefore it is important to design measures for all different segments of senior tourists who compose this very heterogeneous market segment.

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<sup>9</sup> See detailed data relevant for market research in Annex 1.

This implies a deep knowledge of the senior tourism segment and therefore a sound analysis of this market. There is a growing need to improve knowledge about this segment with extensive European research (to be addressed, among other actors, by the forthcoming virtual European Tourism Observatory and the European Travel Commission), so that European tourism sector is able to respond to the constantly growing demand, both for individuals and for groups, and market's transformation and consequently contribute to fostering the flows of senior tourists and create more job and growth.

The analysis should include, inter alia:

- **Statistical data on seniors** who do not travel or have never travelled outside their national borders and the reasons behind this choice.
- **Trends on the kinds of products and services** seniors are looking for. It is also crucial to define their preferences in terms of travelling and holidays, including destinations, ways of transportation, security, health issues and recreation activities.
- **Data on seniors' income levels**, especially on pensions. More precisely, it is pertinent to find out how much seniors are spending on their basic needs, whether they are willing to spend on travelling and how much they are able to spend.
- The **existing barriers that hamper some seniors to travel**. Some of those economic and socio-cultural barriers have been identified, such as language, lack of information, transportation, general travel and organizational conditions, age discrimination, health care and emergencies, accessibility, travel insurances, financial reasons and lack of attractive and professionalised supply. The relevance of such barriers on international travels should be assessed through research activities.

The collected data together with the already gathered knowledge would help better define this segment of the market, their preferences and socio-demographic characteristics, so that public authorities can adopt decision which duly take into account their interests while tourism businesses and destinations should be able to customise their offer and attract more potential customers.

For instance, recent research<sup>10</sup> has already provided evidence of a positive relationship between tourism and elderly's self-perceived health and functional capacity, demonstrating that tourism can be used as a strategy to promote healthy and active ageing contributing to limit the number of dependent elderly people. A prerequisite for smooth implementation of this strategy is to ensure actual accessibility to tourism activities and facilities.

Actions have not to be started from scratch. A sound knowledge base already exists as well as a number of significant initiatives and good practices.

Within the framework of the Calypso preparatory action, several researches were conducted on the travel habits, preferences and constraints of the senior target group. This knowledge base on the demand side could be utilized for the development of dedicated products.

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<sup>10</sup> See in particular: Carretero, S.; Ferri, M. and Garcés, J. (2012). Accessible Social Tourism as a Social Policy Strategy for healthy Ageing: The Relationship Between Tourism and Functional Health in older Adults. In Minnaert, L.; Maitland, R and Miller, G.: Social Tourism: Perspectives and Potential. Routledge. <http://www.routledge.com/books/details/9780415523783/>

The Report on “*Enhancing the Competitiveness of Tourism in the EU: An Evaluation Approach to Establishing 20 Cases of Innovation and Good Practice*”<sup>11</sup> analyses concrete examples of good practices aiming at promoting transferability and taking-up in the field of tourism, assisting other countries and regions in the development of similar approaches. Five projects were focused on the extension of the season and the diversification of the tourist services supply of tourist. Some elements of these projects could be replicated targeting senior tourists.

Moreover, up to 50 respondents to the public questionnaire mentioned above reported on actions in the field of senior tourism, but almost the majority of these activities result to be short-term ones and a very few had 100% exclusively private financing. Thus, exchanging experiences and good practices, learning and planning cooperation schemes on a European level would facilitate further development of this tourist segment.

Indeed, a European database on senior tourism studies can complement these researches. This database might also include studies on specific tourism product niches that are particularly relevant for senior tourists.

As means to improve the efficiency of the initiative, a similar analysis to seasonality can be referred to as to the justification used to select best practice examples that fit the specific characteristics of each destination's seasonality.

On the other hand, existing good practices could be a source of inspiration for innovative solutions and means to overcome barriers and obstacles and ensure the possibility to travel for all. For example, low and medium seasons discounts and special offers under the initiative of the tourism industry, could be offered to tackle financial issues and facilitate transnational trips. Similarly, to overcome language barriers, organized group travels, guided by trained professionals could be a solution. There is also a lack of centralized information regarding tourism services for seniors, and the use of ICT could help, providing knowledge, training and increasing seniors' use of internet and social media (booking on-line, e-ticketing, e-commerce...). It is also important for the tourism industry to adapt, as much as possible, to the orientations on accessibility, even taking into consideration the limited economic possibilities of certain businesses to adapt their infrastructure. On that point, an important dimension remains the identification and the implementation of cost-efficient business models regarding the use of IT-oriented solutions in the field of ageing. Specific knowledge (Technolage project/Business Model Canvas<sup>12</sup>) has already been acquired by DG CONNECT that could be useful to ensure smart decision-making in the selection of IT-oriented solutions.

More senior-friendly innovative and inter-modal transport solutions should be developed for both individual travellers and groups. Information on health care and emergency should be easily available for both customers and travel agencies, including clear information on the rights of the EU citizens in other EU country. It is also relevant to point out that the service providers shall be stimulated to launch more off-season recreational offers designed in the light of preferences of the target group with the involvement of senior organisations in the product design and development process, business-to-business, and business-to-consumer. After an assessment of those practices a sort of Senior Tourist Good Practice Decalogue could be compiled and disseminated.

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<sup>11</sup> [http://ec.europa.eu/enterprise/sectors/tourism/documents/studies/index\\_en.htm#h2-4](http://ec.europa.eu/enterprise/sectors/tourism/documents/studies/index_en.htm#h2-4)

<sup>12</sup> <http://www.aal-europe.eu/technolage-final-study/>

## **4. ELEMENTS OF THE SENIOR TOURISM PRODUCT**

### **(1) Tourism for All: European Accessibility**

A serious commitment and investment in the field of accessible tourism offers a great potential for senior tourism development. The Commission has launched three major studies on demand, supply and training/skills requirements related to accessible tourism services in Europe, which were presented in Brussels on 6 June 2014 and will be online soon. The results show that this market is expected to become more important by 2020, in particular given the steep growth of the elderly population and its potential economic impact. According to the study on demand, more investments in accessible tourism would increase the direct economic contribution generated by services addressed to senior tourists to a level of between 240 and 270 billion €.

Accessibility is required for people with physical, sensory and cognitive disabilities or other specific requirements. Therefore, accessible tourism experiences should be ensured by appropriate services throughout the tourism supply chain, on the principle that tourism is a fundamental social right for all. In order to achieve this goal, it will be essential to take into account the physical setting of the tourism resources, the customer care necessities and the dissemination and the promotion of accessible tourism offers. Tourism has to be inclusive and socially sustainable, in order to benefit all tourists, businesses and destinations. The tourism industry and its stakeholders must share responsibility for implementing or supporting programmes and actions that ensure access for all. On the one hand, business needs support by European, national and local authorities to do so. On the other hand, the whole sector also needs support in terms of knowledge transfer and innovation. Training and consultancy services are needed to raise awareness about tourism for all. Networking, clustering and building partnerships are also vital to foster innovation and development.

In that sense, the suppliers require greater support at the level of destinations and regional/national authorities to maximise the potential of their efforts. Further initiatives are also required at European level, for example to improve the quality and delivery of vocational training in tourism accessibility. Indeed, the experiences of “*Tourism for All*” programs at national level provides a valid framework to remove the barriers that prevent seniors from travelling and to promote the rights of people with disabilities (especially with reference to the UN Convention on the Rights of Persons with Disabilities-UNCRPD, Art. 30<sup>13</sup>). However, the initiatives undertaken within the framework of “*Tourism for All*” are not transnational.

We must acknowledge that any matter of accessibility must refer also to all types of travelling and mobility impairments, such as organisational challenges, social obstacles, language barriers and information channels, not forgetting the financial and social responsibility impediments. For example, volunteering could be a good claim to motivate senior travels abroad.

### **(2) Quality Recommendations**

It has been underlined that generally seniors tend to be increasingly quality conscious and demanding. Thus, the quality of the tourism offer has to be considered in the product development. To this aim, diverse quality criteria for tourism services shall be collected and examined through the existing good practices, as it has been the case of the informal

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<sup>13</sup> <http://www.un.org/disabilities/convention/conventionfull.shtml>

questionnaire launched on September 2013. In that case, a draft list of general quality principles or non-binding recommendations on senior tourism could be drawn, gathering existing quality schemes from the different stakeholders. A quality strategy suited to the needs of seniors based on market research could be developed if there is clear evidence of the support of a strong European critical mass of stakeholders.

### **(3) Transports**

The access to tourist destinations and sites of interest shall be facilitated via sustainable, comfortable and affordable means of transport. Intermodal cooperation shall be facilitated, by encouraging for instance intermodal transfers, in order to reach destinations, to provide door-to-door quality and eco-friendly services or to complement European green initiatives such as Cycling, European Greenways or other Cultural Routes. Group tourism and tourist coaches are very much relevant in the particular case of the senior group and shall be promoted as an integral part of environmentally-friendly urban mobility planning. Likewise, senior-oriented initiatives shall be undertaken by train, boat, cruises and airplane industries. Indeed, air connectivity and the assessment on airports using spare capacity in the low-season, along with the study of those transport facilities (harbours, rail stations, airports, cities...) that could be sustainable for these kinds of services, shall also be highlighted.

### **(4) New and innovative products**

The economic potential related to the 'silver economy' in Europe is based on the fact that the retired pensioners of the *Baby Boomer* generation are used to consume and will actively seek out information for themselves, often refusing to be defined by their age group. Similarly, lifestyle defined in the previous periods of their life will remain in their senior age. Moreover, the whole process becomes highly dynamic especially in the field of expectations about products, experience and the way to organise holidays.

Thus, tailored-made senior innovative product development shall be facilitated (as it was the aim of the Senior Call for Proposals by the European Commission launched in June 2013). Suppliers shall be stimulated to develop thematic senior-oriented tourist offers, such as cycle tourism for seniors, always considering the dynamics of trends and seniors' preferences. The creation of more services and tourist activities, including individual and group tourism, is a necessity at the destinations during the low and medium seasons. Moreover, innovative products should be designed and implemented in the perspective of quality, safety and responsible tourism. Innovation (shall) incorporate and emphasize a marketing of sustainability (e.g. awareness-raising activities for a responsible and sustainable tourism), including local products, natural and cultural heritage preservation, cooperation and integration in the host societies, contribution to local wellbeing and local economic development. It is particularly important to take into account the many regions which are outside the main and biggest touristic destinations (islands, mountain, sparsely populated, border and other remote regions), in order to include them into a European mechanism to secure full development potential. To reach those goals, co-operation between travel agencies, transportation enterprises and accommodation shall be a priority.

Access to ICT is also essential when we refer to innovative products. It is important to ensure that seniors are not excluded from the online world and indeed the social media environment. This could be achieved by creating of a multilingual online one-stop-shop information platform, which could gather, maintain and offer regularly updated information regarding all aspects of travel arrangements for both senior customers and business suppliers; for example, enhancing the role of existing platforms such as the e-Calypto platform could also be a very good step in this direction.

The use of ICT is closely linked with the connectivity dimension. In that respect, adequate connectivity policies are essential to ensure technical smooth running of IT-centred solutions (platforms, IT networks, most electronic tools,), but are also crucial to secure data sharing between all parties involved (users, private companies, public institutions, but also families, carers).

The use of ICT could be also enhanced through the development of training schemes for tourism professionals providing services to senior people. Similarly, easy access to healthcare systems and emergency assistance could be developed through information systems and new technological applications, providing facilities to the emergence of a new dynamic subsector (health tourism) which can help tourist destinations struggle the overreliance on a short tourist-intensive season.

One more innovative example to increase tourism flows in low seasons, could be the stimulation of tourism stakeholders to jointly develop programmes offering advantages to seniors, such as the concept of a *European Senior Card*. The European Commission could facilitate this cooperation between public and private actors at different levels for the development of special discount cards for seniors, which may positively affect the participation of this segment in individual and group tourism offers. The idea would be to facilitate special agreements for seniors, usually between senior associations, the private sector and destinations, in order to identify the beneficiaries of such agreements and decide on various funding concepts and sources at the same time.

Another dynamic way of fostering the abovementioned actions could be the establishment of an annual European award, dedicated to innovative business practices and tourism destinations policies that promote out-of-season and senior tourism.

## **(5) Synergies with other European Initiatives**

The potential of finding synergies with national and European good practices and initiatives for product development has been fully reiterated in this Report. In order to attract senior tourists, cooperation among different actors needs to be a priority and the existing public and private partnerships (networks, strategies, political, institutional and financial structures...) must be capitalised and further developed.

Therefore, synergies with European initiatives can be foreseen, like with the European Innovation Partnership on Active and Healthy Ageing<sup>14</sup>, the European Capital of Culture<sup>15</sup>, the Cultural Routes<sup>16</sup>, the Greenways<sup>17</sup>, eCalypso<sup>18</sup> and other transnational programmes and policies in the EU framework (e.g. Macro-regional strategies, twinning policies between cities, and European Neighbourhood Policy-mainly in boarder regions-). Similarly to the proposal of an annual European award, the EDEN programme<sup>19</sup> could concentrate on senior tourism for its next Call for Proposals in 2017.

## **(6) Branding development**

A European brand strategy could be developed and implemented to be used by companies and destinations that follow the quality principles or criteria identified for seniors. The strategy would define the objectives and identify the different assets of the project following the ERASMUS example: active ageing, transnational exchanges or European citizenship, along with the different products under this brand umbrella. The Commission, public authorities, regional and national tourism organisations, ETC and other public and private players with European brands and labels (e.g. EURAIL Group) may work on a joint promotion strategy. ETC plans to include experiences for seniors in its new communication concept for its revamped portal “VisitEurope.com”.

Creation of a communication and a creative platform to brand Europe as the best destination for seniors both high and off-peak season period would be a measure to implement through the ETC’s portal “VisitEurope.com” and/or within private projects as the e-Calypso platform.

## **(7) Developing recreation in off-peak season matching offer and supply.**

It is often the case that touristic attractions are closed in off-season. It is thus highly important to put in place a clear policy on product development. All-weather infrastructures and a good mix of open all year products for the senior group are essential. It is also important to go on developing a common booking system at the EU level. In that sense, business-to-business clouds and platforms, especially eCalypso, operational from July 2013, and TOURISMLink<sup>20</sup>, which promotes the integration of tourism and digital markets, should be encouraged in a senior-oriented perspective.

Many national/regional senior organizations and associations (shall) be included into this European initiative. It is recommended to create a data base or a network of these senior tourism organizations and associations. There is also a need to develop a thematic senior tourist offer, rating it by special needs, preferences, requirements and complexity.

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<sup>14</sup> [http://ec.europa.eu/research/innovation-union/index\\_en.cfm?section=active-healthy-ageing](http://ec.europa.eu/research/innovation-union/index_en.cfm?section=active-healthy-ageing)

<sup>15</sup> [http://ec.europa.eu/culture/tools/actions/capitals-culture\\_en.htm](http://ec.europa.eu/culture/tools/actions/capitals-culture_en.htm)

<sup>16</sup> [http://www.culture-routes.lu/php/fo\\_index.php?](http://www.culture-routes.lu/php/fo_index.php?)

<sup>17</sup> <http://www.aevv-egwa.org>

<sup>18</sup> [www.ecalypso.eu](http://www.ecalypso.eu)

<sup>19</sup> [http://ec.europa.eu/enterprise/sectors/tourism/eden/index\\_en.htm](http://ec.europa.eu/enterprise/sectors/tourism/eden/index_en.htm)

<sup>20</sup> The action aims to improve ICT adoption by SMEs in the Business to Business tourism industry, to improve the competitiveness of the tourism industry, by enhancing business relationships between source markets and destinations, and to facilitate the connection of SMEs to the global digital value chain through the development of simple, low-cost, easy to use, and interoperable solutions. (<http://www.tourismlink.eu/>)

## 5. INTERNATIONAL DIMENSION

In addition to all promotion activities at the EU level, an analysis of the different senior profiles in key long-haul developing markets such as Brazil and China, as well as the lessons learned from developed markets such as the United States, allowed conducting a market research with a broad international perspective<sup>21</sup>. In the current state of the question, it is possible to propose pilot cooperation mechanisms with Brazil, China and the United States, which could facilitate future developments and cooperation with other third countries. Initiatives on tourism for all to enhance senior exchanges like the INATEL Foundation's between Portugal and Brazil must be encouraged and extended to a wider European perspective.

Along with those innovative initiatives at international level, it is also important to study the international potential of existing national senior-oriented actions. Providing former international initiatives, developed travel itineraries could now be promoted with a concrete orientation to the individual and group senior tourism.

Moreover, the European Commission will promote, in cooperation with ETC, the EU as a single destination for seniors in long-haul markets.

Through the adoption of the legislative proposal amending Regulation (EC) No 810/2009 of the European Parliament and of the Council of 13 July 2009<sup>22</sup> establishing a Community Code on Visas (Visa Code), the Commission is modernizing the visa provisions, while offering further facilitation to legitimate travelers with a view to achieving a smarter common visa policy. This is absolutely mandatory to increase the attractiveness of the EU for senior tourists. The proposal is in line with the Commission's communication "Implementation and development of the common visa policy to spur growth in the European Union"<sup>23</sup>, and the need to ensure greater consistency with the growth objectives of the Europe 2020 strategy.

The international cooperation on senior tourism in low and medium seasons (shall) be based on the promotion of existing International Agreements with third countries (Brazil<sup>24</sup>, China<sup>25</sup>) as well as sectorial agreements (e.g. the Inter-bus Agreement on International occasional coach tourist services).

## 6. GOVERNANCE

To help reaching the abovementioned goals, the main way must be to create governance mechanisms which should be coordinated at European level, aiming at fostering the flows of senior tourists during low and medium season. Indeed, according to the survey "a vision for the future of tourism", better governance in the tourism sector at European level would have a potential impact on this initiative.

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<sup>21</sup> General figures on overseas markets by specific countries (United States and Brazil) are shown in Annex 1.

<sup>22</sup> OJ L243, 15.09.2009, p. 1. <http://eur-lex.europa.eu/LexUriServ/LexUriServ.do?uri=OJ:L:2009:243:0001:0058:EN:PDF>

<sup>23</sup> COM(2012) 649 final of 7.11.2012.

<sup>24</sup> Joint Declaration between the Minister of Tourism of the Federative Republic of Brazil and Mr. Antonio Tajani, Vice-President of the European Commission, on the "50.000 tourists" pilot experience to strengthen tourism flows between Brazil and Europe, signed in Sao Paulo, on 4 October 2010.

<sup>25</sup> Joint statement from the European Commission and the National Tourism Administration of the People's Republic of China on cooperation in the field of sustainable tourism (19 July 2013)

In that sense, public-private partnerships and triple helix models<sup>26</sup> could be supported at regional, national and European levels. It is important to always have all relevant stakeholders involved in the processes and the participation of private sector should be enhanced and encouraged.

At European level, a “steering board” is also necessary to develop, monitor and coordinate the specificities of each given project, as well as encouraging pan-European tourism offers. Members of that board could represent both the public and the private touristic sectors, and the European Commission. The creation of similar monitoring commissions at regional and national levels is also welcome. The support to initiatives should be flexible, with public, private or mixed actions. As for the criteria to support a project, wide trans-nationality and transferability as well as good practices, shall be taken into account.

An “*EU Senior Tourism Initiative Board*” (EUSTIB) could be therefore set up in order to help the Commission coordinate the abovementioned activities and to drive monitoring. Continuous assessment of the activities is a key issue for the success of this strategy. The establishment of quantitative objectives mentioned in chapter 2 of this Report in a medium and large terms are very clear measurements of the development of the activities on senior tourism. Furthermore, the evaluation of activities could be further explored through the analysis of the Report on the exchange of good practices mentioned in chapter 3. Indeed, that Report sets out how the project applies evaluation disciplines to the process of identifying and characterising ‘good practice’ (Relevance and coherence; effectiveness; efficiency; sustainability; utility & European value added)<sup>27</sup>.

With regard to promotional activities, private organisations and public authorities should develop a multi-level approach. Tourist services for senior citizens at all levels exist and are also numerous. They often remain isolated and are not sufficiently promoted within the supply chain. In that sense, the support to tourism offices, tour operators, industry organisations and senior organisations is a key element. That support should particularly focus on establishing EU-wide orientations on installations, services and products which are adequate for senior tourism. Multi-level public-private partnerships mechanisms should also permit awareness-raising campaigns among stakeholders, and allow trainings to professional staff, public clerks, administration officers and social servers in general. These trainings could be mainstreamed/financed by other EU policies and European Commission’s programmes, especially ESF and Erasmus+.

Awareness and guidance should also come from the institutional level, so the support of public government authorities must be enhanced, at national (NTO), regional (RTO) and destination and local (DMO and equivalent institutions) levels. That way, the transnational initiatives undertaken at the level of stakeholders could be oriented by public authorities in voluntary schemes, regarding elements like criteria, operative mechanisms or mobility planning. The ENP countries could also be included within these working patterns. In the first stage, collaboration would be established with those stakeholders willing to collaborate, and the rest of stakeholders should eventually follow the movement.

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<sup>26</sup> The Triple Helix concept refers to an interaction between governments, universities and industry. It comprises three basic elements: (1) a more prominent role for the university in innovation, on a par with industry and government in a knowledge-based society; (2) a movement toward collaborative relationships among the three major institutional spheres; (3) in addition to fulfilling their traditional functions, each institutional sphere also “takes the role of the other” performing new roles.

<sup>27</sup> [http://ec.europa.eu/enterprise/policies/industrial-competitiveness/monitoring-member-states/good-practice/index\\_en.htm](http://ec.europa.eu/enterprise/policies/industrial-competitiveness/monitoring-member-states/good-practice/index_en.htm)

Most significantly, European networks and clusters shall be involved in the processes, for these wider organisations are more likely to support senior tourism policies. While the policies are undertaken at the local destination level through platforms like DestiNet or NECSTouR, other transnational sectorial structures can be useful, such as Rural Development Networks, EDEN Networks or City Tourism. The Enterprise Europe Network will support business and innovative partnerships among tourism SMEs through the Sector Group on Tourism and Cultural Heritage. Likewise, some thematic clusters have a strong interest in cooperating on senior tourism, as it is the case for hotels, group tour organisers and coach companies, spas or cultural travel agencies. Private or semi-private organisations (e.g. AGE, trade organisations like HOTREC, EuroGites, IRU or EUFED, commercial organisations like OTAs, airlines or tour operators) should also be encouraged in monitoring, promoting, and communicating the initiative among their members, as well as involved in the aspects of product development, communication, marketing and sale of senior tourism. Their actions would depend on the objectives, guidelines or statutes of each stakeholder.

## **7. FINANCING**

Financing is a key question when it comes to investments in senior tourism. It is essential to be able to identify the opportunities offered by European Funds so that both public and private stakeholders can access to these funds, either directly in the form of co-funding for projects as a result of specific calls, or indirectly by using the other EU financial instruments available. In addition, it should be a priority to determine who would finance the different projects and cover the risk of industry's operations. To this aim, it could be useful to prepare a list of best practices, including inputs from regional and local authorities and from the industry when dealing with financing special senior products. That list would also identify some good examples of EU-funded projects related to tourism that have been co-financed by different funds and programs. Existing knowledge of the EU Commission must be shared to support decision-making process in that field.

As regards to EU financial instruments, tourism projects must comply with the specific objectives and requirements of these different funds and programs. Most of the aids will be managed by the EU Member States. Tourism has not been included as such among the 11 investment priorities for the future Cohesion Policy for the period 2014-2020. Nevertheless, Regions shall still deploy efforts to support the inclusion of tourism under the different Thematic Objectives to achieve smart, sustainable and inclusive growth and employment.

It is also essential to call the attention of the EU Member States and its Regions on the importance of including national and regional policies, specifically oriented to senior, low and medium season tourism activity, amongst their priorities within the Partnership Agreements and Operational Programs in accordance with the respective National Strategic Reference Framework (NSRF). If they are not included, there will be no possibility to request funding for supporting these tourism projects at a later stage (2014-2020).

A guide for funding opportunities for 2014-2020 will be available online in October 2014<sup>28</sup> to provide easy and complete information on funding programs for tourism projects. This information should be practical, clear and include details on who, how and when to apply, so that the interested parties are well prepared to handle the application process. In this sense, the opportunities offered by Rural Development/EAFRD, European Regional Development Funds/ERDF, European Social Funds/ESF Cohesion funds / European Maritime and Fisheries Funds/EMFF, are especially relevant. Indications on actions and examples of tourism projects funded within the framework of the EU were included in the presentations of the Info Day on EU funding opportunities for tourism, held on 20 March 2014 at the European Commission<sup>29</sup>. In addition, the analysis of the Operational Programs for supporting tourism activities is also essential to understand the opportunities as well as to facilitate a wider dissemination of the information among stakeholders at a later stage.

Other funding opportunities come from the Program Horizon 2020 (e.g. innovative e-health, accessibility, anti-ageing and IoT<sup>30</sup> projects) and the European Territorial Cooperation programs (which include funding for tourism projects and consider cross border or transnational tourism development as a main priority).

## **8. THE ROLE OF THE EUROPEAN COMMISSION**

The Commission will politically support this strategy by providing strong coordination and dissemination activities through the development of specific communication activities, with the concrete support provided by ETC in the following areas:

- Promoting EC initiatives for seniors on its ETC new portal VisitEurope.com,
- Promoting initiatives for seniors in long-haul markets through its ETC network and Operation Groups.

The European Commission would also encourage the dissemination and promotion of the off-season senior tourism activities at the main European and international tourism events. Within this scope, the Commission would consider supporting the establishment of an annual business-to-business meeting platform focusing on senior tourism, including off-season, which could provide an excellent opportunity for the different senior tourism stakeholders to exchange best practices and showcase the growing importance of the senior tourism market in Europe.

Co-financing support to senior tourism projects would be enhanced through a dedicated Call. In the summer of 2014 (indicative date) the Commission foresees to launch the second Call for Proposal on seniors aiming at the extension of seasonality, with a particular inclusion on youth, as a pilot phase, financing 1.8 M€ allocated from the COSME Program.

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<sup>28</sup> (The link to the publication of the guide will be provided here)

<sup>29</sup> [http://ec.europa.eu/enterprise/newsroom/cf/itemdetail.cfm?item\\_id=7252&lang=en&title=Info%2DDay%3A%2DEU%2Dfunding%2Dfor%2Dtourism%2D](http://ec.europa.eu/enterprise/newsroom/cf/itemdetail.cfm?item_id=7252&lang=en&title=Info%2DDay%3A%2DEU%2Dfunding%2Dfor%2Dtourism%2D)

<sup>30</sup> The Internet of Things (IoT) is a scenario in which objects, animals or people are provided with unique identifiers and the ability to transfer data over a network without requiring human-to-human or human-to-computer interaction. IoT has evolved from the convergence of wireless technologies, micro-electromechanical systems (MEMS) and the Internet.

Besides the coordination on tourism opportunities through the financial instruments, the Commission has been also very active in the coordination of cross-border activities from different DGs whose activities have direct or indirect impact on tourism. In this sense, the European Innovation Partnership on Active and Healthy Ageing coordinated by DG SANCO in close connection with DG CONNECT, includes, as concrete actions, to develop ICT framework for accessible social tourism, to promote tourism as a strategy for active and healthy ageing and to gather evidence based guidelines on tourism and leisure activities<sup>31</sup>. DGs JUST, EMPL, REGIO, RTD, MOVE, EAC, CONNECT and ENTR would be invited to take part in this cross-sectorial initiative since a “silver economy” inter-service group is exploring collaboration possibilities.

In February 2014, the Commission presented a new strategy to enhance coastal and maritime tourism in Europe. The strategy should help to drive forward coastal and maritime tourism, a key sub-sector of tourism and largest maritime economy activity, and to fully exploit its potential. Synergies with senior tourism will be analysed within the implementation of the strategy.

Indirectly, some EU legislative acts could have a potential impact on senior tourism. For instance, it is important to mention the advantages of the Directive on Cross-Border Healthcare, which provides health services reimbursements for tourists in all the EU member states according to national legislations, respecting National Insurance Services. Similarly, the “Citizens Program”<sup>32</sup>, is a clear example for senior-related funding projects through twinning programs, coordinated by DG EAC. Furthermore, in July 2013, the European Commission made an important step towards improving the protection for holiday makers by modernising EU rules on package holidays, so as to respond to fundamental changes occurred in the travel market which could affect among other, the senior travel behaviours<sup>33</sup>

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<sup>31</sup> [http://ec.europa.eu/research/innovation-union/pdf/active-healthy-ageing/d4\\_action\\_plan.pdf#view=fit&pagemode=none](http://ec.europa.eu/research/innovation-union/pdf/active-healthy-ageing/d4_action_plan.pdf#view=fit&pagemode=none)

<sup>32</sup> <http://eacea.ec.europa.eu/citizenship/>

<sup>33</sup> Since the adoption of the Package Travel Directive (90/314/EEC) in 1990, the travel market has greatly evolved: citizens have increasingly taken a more active role in tailoring their holidays to their specific requirements, notably by using the internet to combine travel arrangements rather than choosing from ready-made packages out of a brochure.