RAPPORTEUR GROUP

EU Low Season Tourism Initiative Board

EULSTIB

FINAL REPORT

JÄMTLAND HÄRJEDALEN Turism

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Summary

This report focuses on the tourism and hospitality industry by discussing its current status as well as future potential and effects on economic growth and job generation. Since this is the final report to conclude EULSTIB initiative (EU Low Season Tourism Initiative Board), a special emphasis is given to the issues of tourism seasonality. Furthermore, as the EULSTIB initiative has focused on senior travellers as an important market to develop the low and medium seasons, critical discussions and recommendations in relation to age friendly tourism are presented.

The main overall finding is that building skills and competence at SME level, in a bottom-up perspective, is key for boosting tourism development in the industry. By focusing on strengthening SME's own abilities to raise their quality and provide for the market, sustainable and long-term industry effects are enabled. A suggested method for working with this is by using effective business training programmes.

There is a big interest among different stakeholders and levels to learn from each other for the purpose of working smarter for better business. EU with its longterm commitment has been positively contributing to create these platforms for better cooperation to increase the possibilities for building knowledge and sustainable development.

Findings related to the role of the EU and its initiatives for tourism development are that a clarification of assignments is needed as well as identifying obstacles and how to eliminate them. A stronger focus on facilitating for the industry is suggested together with a ensuring that EU financial programmes better correspond to actual market behaviours and to what is truly needed for the industry.

The question of whether to promote EU as a single destination towards long-haul markets or not is also highlighted, suggesting that the diversity of all EU states should be promoted rather than communicating homogenity, and that this is most successfully done by the industry itself and its existing platforms that the tourists are already using rather than by new ones developed at EU level.

Regarding future EU projects and initiatives within tourism seasonality (or tourism in general), better learning processes from previous projects and intercommunication between ongoing ones are requested. Finally, a conclusion regarding age friendly tourism is that it should be developed with better knowledge about the senior market and its diversity, with the basic starting point of always targeting and understanding tourists by interest rather than age.

The methods used to reach the conclusions in this report are collection of information from relevant reports and articles, interviewing participants of the EULSTIB initiative as well as representatives of previous projects within seasonality and age friendly tourism and listing best practice.

Part I

1. Introduction

1.1 Starting Point

The starting point for this report is the EU's Growth Strategy, Europa 2020, launched in 2010 with the objective of creating smart, sustainable and inclusive growth in European member regions.

The report is centred around employment, but further expands on R&D, education, social inclusion and poverty reduction, whereby the hospitality industry is implicated, largely due to its direct and indirect effects related to employment.

EU2020 has a number of joint initiatives, so called "Flagships" or engines for boosting growth and employment. These initiatives are coordinated on both a national and European level, when combined, aid in reaching the objectives and goals that were laid out. These flagships, which we have seen as a base for this report, are identified as:

1. Digital agenda for Europe
2. Innovation union
3. Youth on the move
4. Resource efficient Europe
5. An industrial policy for the globalisation era
6. An agenda for new skills and jobs
7. European platform against poverty

1.2. Problem

Destinations in the EU are traditionally seasonal, whereby the peak season occurs over a few short, intensive periods of each year, which accounts for the majority of the destinations SME's annual revenue. This, in turn, creates a problem of a low year-round rate of employment in the SME's and subsequently results in an insecure labour market, lower tax revenues and lower economic growth on regional level.

Potential: A customised selection based on a potential target group during low and mid seasons, allows for a pro-longed touristic season, a greater number of year round employees and ultimately, higher tax revenues.

Mission
Collect the outcome of the EULSTIB Action Group's 2015-2016 work. The final report will include know-how, best practice and policy/business recommendations at a EU level, in order to increase the demand over the low season. As a result, improving the competiveness of regional tourism as a whole. The report will be utilised as a reference document for guiding future European policy making and public/private investments in the tourism and hospitality industry.

1.3. Aim

The report will describe, analyse and highlight the tourism and hospitality industries current status, yet discussing future potential with a focus on the low and mid seasons, with the holistic aim of creating improved conditions for smart, sustainable and inclusive growth.

Limitations: The scope of the report builds on the focus areas of the EULSTIB-board.

1.4. Objectives

1. Gather knowledge and provide an overview of current and planned age-friendly tourism related products, initiatives and policies in Europe, giving priority, but not limited to those planned to support tourism in the low-medium season.
2. Identify best practises and promising transnational products where low season tourism can create new jobs and economic growth, while helping to address the ever-present challenge of seasonality.
3. Assess and provide an estimation of the potential size of tourism demand for the low-and shoulder season from Europe and other relevant source markets, in terms of current and future volumes through 2025, in terms of tourist arrivals and nights, and their impact on jobs and economic growth potential.
4. Develop policy and business (mainly to SME's) recommendations at EU level regarding how best to extend the low season, taking advantage of, among others, of age friendly tourism.

1.5. Outline of the report

The report is divided into two parts. The first part (chapters 1-7) focuses on outcomes and recommendations, while the second part (8-12) is for deeper understanding and includes trends, statistics and information about previous and current projects and initiatives.

2. Background

2.1. Seasonality in the tourism and hospitality industry

The tourism and hospitality industry is a diversified sector, creating both direct and indirect effects from a growth based perspective. According to the UNWTO, the accepted international definition of tourism is as follows: *"Tourism comprises the activities of persons traveling to and staying in places outside their usual environment for not more than one consecutive year for leisure, business and other purposes."*

The hospitality industry has long been associated with seasonal fluctuations; whereby tourists travelled primarily during their traditional holiday periods. But over time, travellers have also categorised their trips into private and business trips. In correlation to the traveller, the destinations themselves experience particular trends over the year regardless of the total visitor numbers; different visitor groups have varying travel patterns, varying spending habits, trip length, goals and trip expectations. These trends equate to the fact that tourism is a demand driven industry and that the behavioural habits can be connected to trends and are able to shape the industry.

The concept of seasonal patterns are consistent, but vary greatly in character in Europe, where traditional summer mass market destinations traditionally experience short, intensive peak seasons between June-August, before heading into there low season for the rest of the year. In contrast, the more traditionally winter orientated destinations experience their peak season from Christmas through to Easter.

There are, however, several destinations that early on managed to attain a balanced year round trend of visiting tourists, these being typically larger European cities, not dependant on weather, but on their unique attractions, culture and shopping that attract inbound tourists.

Regardless of seasonal structures, the afore listed problem creates distinct difficulties in the attempt in gaining smart, sustainable and inclusive growth.

The discrepancy in seasonal variation makes it hard to generate the necessary financial prerequisites for year round employment, with revenues being locked to certain periods and the base for year round employment simply does not exist. This in turn leads to difficulties in recruiting the suitable skills for the positions available, particularly within the academic level, whereby the above mentioned problem creates both uncertainty and a lowered interest in relevant education and employment.

2.2. “PESTEL” analysis

Using the EU2020 as a starting point and to be able to further understand and formulate the best conditions for continued growth in the hospitality industry, the “PESTEL” model[1] will be utilised in categorising the problems that affect the hospitality industry not only today but also in the future. These five factors are:

- Political
- Economical
- Technological
- Ecological
- Legal

The PESTEL model is a strategic analysis tool used to identify macro-factors that affect companies. The analysis is used to study the external factors in a SWOT analysis.

[1] http://pestleanalysis.com/what-is-pestle-analysis/

Each respective point highlights a macro perspective on the current status in each area but also provides a broader perspective on each factors effect on the hospitality industry.

Political: The political situation in Europe and the rest of the world affects our travelling habits, both directly and indirectly and in some instances are responsible for a complete halt in travelling. The past few years' events, such as terrorism, have negatively reduced travelling, at least in the short term. At the same time though, political decisions at country level can create demand in tourism, particularly when it comes to safety and security, or visa regulations, which can affect traveller's choices of destinations. Another aspect of the political factor, which affects the hospitality industry, centres on employment and seasonality. Seasonality creates an uncertain labour market, which in turn creates social and economic insecurity, leading to social exclusion and reduced tax revenues.

Economical: Following the financial recession from 2007-2008, the recovery in the financial market has had mixed results. The recovery has had varied results on the macro vs. micro level, as a result of the different types of government stimulus measures that were utilised to kick-start the private economies consumption. We believe that this has had a positive effect on the hospitality industry, but of course varies from one currency to the other. This exchange value also affects destination attractiveness towards budget savvy travellers. In the face of the economic and social priorities of 2016-2017, the commission's aim is for the destination countries to increase investment, accelerate structural reforms and investment and continue to pursue responsible fiscal policies. This presents a platform to provide specific recommendations to the economical policy in the European Region, in bringing forward the common challenges in the region as well as the national planning aspects.[2]

Technological: The hospitality industry was one of the first industries to be affected by digitalisation. The ways in which tourists searched for information, booked trips and shared their experiences with each other changed fundamentally. The shift has seen product ranges that were once governed by providers to today, shifted to the consumer that actively chooses and thus develops new products and destinations. Coupled to the digitalisation phenomena is the fact that both private and business travellers today demand a high level of digital accessibility, which requires a well-developed infrastructure. This demand for digital access is experienced on both urban and peripheral environments, which in itself is a challenge for sustained and developed attractiveness. Digitalisation and new technology has also made it possible for people to share experiences and create value in new ways. Entirely new channels of communication has opened for B2B (Business to Business) and B2C (Business to Consumer), but at the same time experienced direct evaluating of experiences by consumers that business owners can no longer control.
Today's societal values are increasingly directed towards sustainability, which centres on the concept of shared resources. This can and should be used as a powerful driver of the new-shared economy.

Ecological: Depletion of the earth's natural resources is high on the agenda across all levels of planning, particularly on the individual travellers. This plays a particularly important role in the hospitality industry, as international travelling carries extensive costs on transport and environmental impacts.
While budget airlines has lowered the personal costs for travel, consumers have become more demanding of carriers to take responsibility for their environmental impact. This may eventually lead to higher fares, alternative fuels and other measures to reduce environmental costs.
The ecological perspective is also today one of the most important triggers for a consumer, sometimes higher than price. Acting in a responsible ecological manner is therefor a strategic path for a nation and destination to be more successful.

Legal: The EU and National Level both have the legal means to affect the growth and development of the hospitality industry. Taxes, Value Added Tax (VAT) and levies are examples of how legislation affects development and its effects on SME's.
This sector also varies depending on member nations, meaning that conditions for SME's in the EU differs greatly. Inasmuch, this also affects our competitiveness against other competitive

[2] http://ec.europa.eu/economy_finance/eu/index_sv.htm

destinations, where for example travel patterns against the "tax-exempt" areas can either be seen as a threat or a potential opportunity.

2.3 +55's as a possible target group to solve the problem?

The EU Commission has identified the +55 age group as a potential target group to reduce the fluctuations in seasonality, due to varying reasons, such as reduced dependency on travelling over traditional school holidays and so forth. Alternative names for this target group are the "baby boomers" [3] (those born between 1946-1964), WHOPS (Wealthy, Healthy, Older People), mature consumer or Senior Tourism.

The reasons identified behind this selected target group are based on the fact that their children have moved out of home, that they have gone on pension and no longer are controlled by traditional peak holiday periods. These travellers also have the opportunity to travel during quieter periods that often coincide the lower prices. While these assumptions prove to be correct, the challenge lies in evaluating the +55's as one coherent, single target group. The challenge behind this is that the target group is comprised of individuals with different interests, physical capabilities, travel habits and economic conditions.

While it may initially pose as a challenge to increase traveller numbers during low to mid seasons of this market group, it is no different to formulate a strategy for any other particular target market, stemming out of the needs based strategy for target groups.

2.4. Competence and qualitative values in the industry

One of the challenges faced when it comes to strategies and objectives in the hospitality industry, is that successes are measured in quantitative values, i.e., more beds, more guests, more reasons to travel. An alternative thought in measuring the quantitative values should be to shift focus in the qualitative values, i.e., better beds, better guest satisfaction that help us in our development, better reasons for travel that aid a destination and prevent exploitation for future generations. This change in mind-set is needed today in order to make a lasting difference in the future of travel. "You cannot do today's job with yesterday's methods and be in business tomorrow." (author unknown).

An important identified focus area to enable sustainable and qualitative growth in the tourism industry is to build competence for the right stakeholders. Therefor, skills and competence (what, for who and how) is a recurring point of discussion in this report. The quickest and easiest road to success in alleviating the concept of low-mid seasonality is to line up the right stakeholders with the right skill sets, for the relevant target groups with the appropriate product offering and to find the right partners to make business happen.

We therefore want this report to present the challenges and opportunities of the tourism and hospitality industry, as a tool for on-going, year-around growth and to present trends that are relatable to for destinations. The report can be used as a means to focus on completed, on-going and planned initiatives, to present "how to" examples and to focus on the competence required and the need to be permeated and strengthened at all levels of operation and management.

[3] https://en.wikipedia.org/wiki/Baby_boomers

3. Critical reflections on current and previous projects and initiatives

Later in this report, a list of previous and current EU initiatives and projects dealing with seasonality and age friendly tourism can be found. Even though this list might not be fully exhaustive, it clearly reflects the EU's strong commitment to this issue and the importance that it has been given. Also, many good results have come from all the previous initiatives and projects and are still to be expected from the current and planned ones. However, we would like to highlight a few critical conclusions related to this overview, which will also be tied back to later in the report.

Importance of "intercommunication" between projects and effective usage of previous project results
The array of projects includes similar themes, objectives and actions while also being implemented simultaneously in the same time period. The projects also follow each other chronologically. This means that the same concept risks being done concurrently, but in different geographical areas, but also that once a project is finished, another one starts without clearly enough building on the results from a previous one. A suggested approach would be to better ensure that future projects build on previous ones and learn from previous results. Also, we propose that the EU design their future project calls so that they focus on continuation and development from previous project results in order to move forward.

Targeting the senior market in a better way (or not at all?)
Many of the above listed projects do not seem to fully respect the heterogeneity that exists within the senior segment. Accessibility, for example, becomes a major theme in these projects, not respecting that many seniors nowadays are very active and looking for more challenging activities and experiences. Targeting seniors and creating special products and packages for them can also be problematic, as many seniors do not want to be pointed out or addressed depending on their age. Quite contrary, many wishes to travel on the same terms as anyone and might be repelled by products specifically created for the +55 market group. Our suggestion is, in accordance to research findings presented in Chapter 9, to not create age friendly tourism projects targeting this market as a homogenous group and rather to understand the expectations and needs of the mature market as individuals and their travel locations rather than the segment itself. Future initiatives should define specifically which kind of seniors they are targeting, find the right channels to reach them and also cooperate with this group.

Actions to better correspond to markets behaviours
A call to a project often requires that participants from several different Member State forms a project group and creates transnational products, websites and platforms based on numerous themes. While this transnational cooperation might be good to encourage, transnational tourism products do not always correspond well with what the market actually demands. Different countries also have very different conditions. Also, most tourists today, regardless of age, would probably not use EU platforms and websites when browsing holidays, but rather use established platforms such as booking.com, hotels.com, tripadvisor.com or travel agents. Tourism products, developed in some of the above mentioned projects, are communicated through the project websites, which is normally not a natural channel for tourists while browsing holidays. Also, to include flexibility in project calls, as with the case with the research on senior needs that was required to go through senior organisations, even though a big part of the target group do not engage in these type of organisations. These kinds of requirements run the risk of limited project results.

Implement actions at the right levels
Financial means from the EU in these kinds of projects tend to be granted to organisations, DMO's, etc. However, the stakeholders that needs to profit most from being strengthened and would contribute most to growth and development are the tourism SME's. Creating meaningful actions and strengthening the tourism SME's should be the core theme in all projects, as this is most often where the tourism consumption takes place. This issue is discussed further in *Chapter 4: Business training for improving tourism in the off-peak season*.

EU initiatives to support (not compete with) the tourism sector and its SME's

Creating new tourism products, packages or tourism websites at EU level might sometimes nearly compete with what the tourism private sector and its SME's already are doing. To eliminate risk, we suggest to:

1) Promote experience and knowledge exchange between relevant actors. Involve private commercial entities that already deal with this segment (specialized entities or companies, OTAs, low-cost carriers) – they have the "real" information about preferences and behaviour of this segment.
2) Consult and strengthen local tourism SME's.

Project time frames

Proper formulation and adaptation of time frames of projects will help in ensuring that the objectives can easily be reached and correspond with seasons to enable effective market tests and collect feedback from users. Project lenghts could, for example, be set according to project activities with a certain flexibility in mind to not hinder the project results, rather than a "one size fits all" regulation around project time frames.

4. Evaluation summaries

To collect feedback and recommendations for the future, questionnaires have been sent out to action group members of the EULSTIB initiative as well as representatives of four previous projects of tourism seasonality and age friendly tourism (ESCAPE, Senior Rail Travel Project, SenTOUR Connect and SenGor – Seniors go rural). Here below, short summaries of the findings will be presented. A full summary of the EULSTIB evaluation can be found in Appendix 1, as well as the full questionnaire template to the previous projects within seasonality and age friendly tourism in Appendix 2 (although then called *current* projects since they were not completely finished by the time of the invitation of the questionnaire).

4.1. EULSTIB initiative

All Action Group participants of the EULSTIB initiative were invited to respond to a questionnaire, with the purpose gathering feedback regarding the work that has been carried out and to gain knowledge of all participants' experiences to enable future improvements of similar initiatives. The results are hard to generalise due to low response rate, but the following conclusions can be made:

- The participants have overall appreciated the conferences with its discussion topics and networking opportunities, but suggests improvement on organisation and structure.
- The objectives of the initiative could have been better defined. Some think they were well defined at first, but became less clear by the end of the initiative. The definitions of the tasks of the action groups were regarded as somewhat more clear, but the work and the communication, involvement and organisation within the groups were lacking.
- Most participants do not think that their action groups have finished their tasks at all. Given recommendations for facilitating this were more private sector involvement, more meetings, better leadership, structure and financing the work of the experts.
- The most successful results are regarded to be the repository of documents, networking opportunity, collaboration and exchange points of views on the concept of seniors.
- Recommendations for reaching better results are for example more support from the commission, linking with other EU projects, more focus on innovation and use of technologies, less discussion, clear lines of work and guidance.

4.2. Previous projects within seasonality and age friendly tourism

Project representatives from four previous projects of tourism seasonality and age friendly tourism, all finished in 2016, were asked to share their most successful results, problems that occurred and future recommendations for similar initiatives. Descriptions of all four projects commented below can be found in chapter 12.

ESCAPE
The most successful results are regarded as the established business cooperation among five tour operators in Bulgaria, Cyprus, France, Italy and Portugal, all focusing on senior tourism during the low season (through the ESCAPE tourism packages and the signing of a Memorandum of Understanding among them). Also, the development of ESCAPE Club criteria (applicable on senior-friendly tourism businesses), the created/increased awareness on business prospects of senior tourism (especially during the low season) and recruitment of senior-friendly tourism businesses and attractions (i.e. ESCAPE Club members) are considered as successful results. If the project had more time than 18 months, the project representative estimates that they would have time to actually *implement* and *put into practice* the links/synergies they had managed to set up with other EC funded projects in the area of senior tourism. A longer project duration (30-36 months) is suggested for future similar initiatives.[4]

Senior Rail Travel Project
The most successful results are regarded as the launching of new products for seniors. With Interrail Tours, the Interrail Pass, has for the first time been included in tourism packages especially

[4] ESCAPE Project representative. E-mail interview 2016-04-19.

designed for the needs of the senior target group. Interrail Premium Pass is another product resulting from the project, which is designed for more independent senior travellers. Good success was achieved in the cooperation with numerous partners from surrounding European countries. Even after the project's conclusion, the cooperation continues. Certain aspects have influenced the project's results negatively (these unfortunately could not have been altered). Two main issues are highlighted: Firstly, the Interrail product is complex. It involves more than 30 partners and there is a certain technical background to issue passes and especially seat reservations to be respected. Secondly, the time frame was quite short considering that we had to approach third parties, such as potential benefit or distribution partners. Without these restraints, the project's results could have been better. However, since the consortium will continue to work on the project also after its official end, especially the issue of finding partners in a restricted time frame will be solved. As future recommendations, the representative highly recommends cooperation with seniors, respecting however that the target group is heterogeneous. This means that similar initiatives should define exactly which kind of seniors they are focussing at and cooperate with exactly this segment.[5]

SenTOUR Connect
The most successful results from the project are the quality criteria checklist for SME's, the senior Tourism network, knowledge Centre on Senior Tourism, the practical experience for seniors of the packages and the discussions and advices before and while they are traveling. To achieve even better results, the possibility to also commercialise the products is mentioned, but this was also not an objective of the project. The project period was not adapted on the development-evaluation and organising the packages in low season, but this has been resolved by extending the project for 5 months during the low season. The evolution of the eCalypso platform is another difficulty that occurred during the project (B2B to B2C and another not yet specified direction during the project), which has been resolved by a new better website with links to eCalypso. As recommendations for future similar initiatives, the project representative mentions learning from the existing projects, create a knowledge centre with the existing project partners that already worked on items and finance the help they procure to new projects.[6]

SenGor – Seniors go rural
The most successful results are regarded as the guidelines for product development, promo material for both clients and micro-SME providers, the website, the "Silver Suitcase" logo as a registered trademark with possibility to be a future generic label together with the cooperation between the four parallel projects (common meeting and event in Florence, Feb 2016). To gain even better results, the period for implementation and testing should have been longer. The delayed start of the project changed the testing period to a less favourable period of the year. The research on senior needs was only conducted through members of senior organisations, as was part of the requirements of the call. However such organisations are not covering the full spectrum of travellers in this the age group, which is regarded as a limitation both for research results and also for practical testing at a later stage. Difficulties that occurred during the project period were that one partner from the side of senior organisations left the project, complicating the involvement of the target group. Also, as mentioned before, the fact that individual, fit seniors (target) do not participate in senior organisations, and are not reached through this communication channel. The timing of the actions after the delayed start was also a difficulty, as well as that the international travel for this age group still requires a longer pre-planning period than dealing with the younger generation. As recommendations for future similar initiatives, the project representative highlights more focus on technical (information, surveys etc) aspects of senior-friendly tourist offers and products, followed by dissemination and implementation through training, technical assistance, repository of tools and examples, expert pool, etc. Also, to involve private commercial entities that already deal with this segment, either specifically (specialized entities or companies), or having seniors as relevant part of their clientele (OTA, low-cost carriers) – they have the "real" information about preferences and behaviour of this segment. Insisting in experience and knowledge exchange between relevant actors (projects, stakeholders, target group, destinations) is also a future recommendation.[7]

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[5] Senior Rail Travel Project representative. E-mail interview 2016-04-18.
[6] SenTOUR Project representative. E-mail interview 2016-04-20.
[7] SenGor project representative. E-mail interview 2016-04-23.

5. Business training for increased and improved sustainable tourism in off-peak season

5.1. Improving the tourism offer by business training for SME's

There are two main conclusions that can be drawn from the work within the EULSTIB initative regarding improvement of quality during off-peak season with the offers towards the senior market.

The first is that knowledge and training are regarded as key aspects in terms of improving the quality of the tourism offer. Knowing the behaviour, needs and preferences of the target groups, as well as how to accommodate for them, become the fundamental base of how to strategically compose and promote tourism supply. Business training is identified as an important method for disseminating and using the gained knowledge about the markets.

The second conclusion is that knowledge and training should be implemented from a bottom up perspective, identifying the SME's as the key players in the industry, subsequently they become the main target group for business training. The role of SME's within the tourism industry is crucial in terms of visitor's perception of quality, since they are the main suppliers in the tourism chain, providing the services that the tourist will request during their holidays. Ensuring appropriate and updated knowledge and skills among tourism SME's is therefore seen as an important aspect of improving the overall destination offer.

5.2. Ensuring training for SME's all through the service chain

Most holidays include interaction with a number of service providers. One single experience of poor quality service is enough to lower the guest's overall perception satisfaction from the entire trip. From a destination development point of view, ensuring excellent quality levels and service all through the service chain is therefore crucial. This also creates and inter-dependence between tourism SME's. This might be even more in question when developing off-peak season tourism that is often characterised by less overall access to service.

When proposing business training as a tool to improve the overall tourism quality – in off-peak as well as peak season - it must be performed in as many businesses as possible that deals with tourist interaction. Tourism training initiatives tends to focus around big operators like chain hotels and airlines even though tourists interact with a number of other businesses (mostly SME's) while on holiday. Business training can instead advantageously be encouraged and arranged from a destination point of view rather than lying in the hands of a few individual businesses separately.

One method at hand to identify the tourism service chain is the concept of geographical, linear and thematically destinations. Geographical destinations are used in this sense as defined by their geographical borders, promoting all products within the area under the same trademark (e.g. Paris or Tuscany). Linear destinations are shaped by linear itineraries (e.g. Cruises or TranSiberian Railway) and thematical destinations by a specific theme that connects different geographical points of interest (e.g. sports or wine). In this sense, the destination and its companies are defined by the activities the tourists wishes to engage in during their holiday. The most important products that compose the destination can be grouped and, if suitable, undergo a general tourism quality business development programme together, focusing on hostmanship, accessibility, sustainability or other general themes. Grouping similar businesses in more niche-oriented business development programmes (like restaurants or accommodation services) has also proved success.

5.3. Common features of good business training programmes

This list summarises the common features of successful business training programmes within tourism, elements that can be seen in most programmes presented in Annex 1. This list can be seen as a guideline on what makes a good programme:

- They are **based on the guests and their behaviours, needs and preferences.** Only after mapping this, methods and strategies on how to accommodate for them in the best way and keeping business one step ahead can be carried through. This knowledge comes from collaborating with research institutes or keeping up to date by other methods.

- They aim at providing the SME's with **relevant skills, knowledge and tools to enable them to take their own business development and competitiveness in their own hands.**

- They have a high degree of **interaction**, including the businesses in the process, discussing in groups, and exchanging experiences in contrast to just being about listening to lectures and reading books.

- They focus on a **wide range of development areas**, operatively and strategically, aspects while attracting and communicating with potential guests, how to create a physically better environment as well as how to better host them once on site and manage customer care once they have left.

Five examples of good business training programmes are presented in Chapter 12.

6. Communicating the tourism and hospitality products.

6.1 Europe, the world's no 1 tourism destination

In June 2010, the European Commission adopted a framework policy titled; 'Europe, the world's No. 1 tourist destination – a new political framework for tourism in Europe'. This framework set out a new strategy and action plan for tourism in the EU. Four priorities for action were identified in this framework that can subsequently be found in the EULSTIB roadmap.

It is therefore important to keep the concepts, arguments and approaches separate when talking about communicating destinations and products in Europe. The vision of; "Europe - the World's No. 1 tourist destination" should not necessarily be seen the same as a joint framework of travel reasons, but rather as a strong platform that operators can optionally use to put their respective reasons for travel, in relation to a strong export destination. Simultaneously, European societies often mistakenly mention Asia and the US as one destination. Yet on the other hand, we know the stark differences in the culture and nature it is between the Nordic countries and the Balkans. So in the same way in gathering travel reasons to order to showcase the richness of a destination, one also runs the risk in trying to be something for everyone, and not just for those who want to visit us. "If Your Content Marketing is for Everybody, It's for Nobody" is a phrase used in communication and showing the difficulty of using Europe as a brand, to communicate tourism marketing.

Another aspect of this concept, is that the majority of trips undertaken in Europe stem primarily from European countries, in which Europe as a destination brand, does not exist. However, when looking to other continents and their respective travel markets, the term "Europe" is used as a travel destination. Therefore, since Europe is seen as one destination, rather than compromised of numerous destinations, it is therefore difficult to communicate that brand.

With that said, the conclusion is that developing brands for geographical areas experience challenging realities in their marketing. We have a quick and transparent consumer-driven communication, with marketing that are dominated primarily through digital channels. To work with Europe as the platform together with the diversified travel reasons (such as USP), effective and smarter communication channels can be used to increase touristic growth over low- and mid-season. Since the Commission highlighted the focus area of Europe's top tourist destinations, numerous spin off activities has been undertaken, such as the marketing campaign – "Whenever you're ready", Publication – "Europe - a thousand different stories", and the Commissions recommendation of simplification of Visa rules[8]. We could also se the work done by European standardization organization for increased accessibility in ICT as important groundwork for "age-friendly" related travels.[9]

6.2 Existing stakeholders and initiatives

It is also important to keep in mind the planned, on-going and completed initiatives listed in Chapter 2, that prioritise the work within Europe as a tourist destination. Apart from these afore mentioned activities and results, there has already been activities carried out on the various markets with the goal to increase growth in the tourism industry. Numerous stakeholders, such ETOA (European Tourism Association), are one of the foremost trade associations for tour operators and suppliers in Europe. The ETOA organise a variety of events that sell Europe to the world and can be carried out if demand and supply are matched, when it comes to a mature audience or other target groups.

[8] http://ec.europa.eu/growth/sectors/tourism/promoting-europe/index_en.htm

[9] http://www.etsi.org/news-events/news/754-new-european-standard-on-accessibility-requirements-for-public-procurement-of-ict-products-and-services

Furthermore, numerous charter companies realised the early potential of adapting to the increasingly seasoned mature traveller and guest. These charter companies over the years have both offered hotel stays that cater for the mature traveller, offer relative promotions and special accommodation for multi-generational travellers and offer clear benefits during low season travelling.[10]

The question therefore is whether the goal of communicating Europe as a holistic destination really is the best point of view to take? International travellers select Europe as a destination, not only from an economical perspective, but selected in its entirety as a destination as its motivational factor, not one determined by its administrative boundaries.

6.3 Good examples of communication/marketing

Destination Europe is already well established in global markets and its value is in its diversity, not in any supposed homogeneity or singularity of one single country. While it is meaningful to talk about European culture and lifestyle etc., this does not translate to destination or product promotion with exceptions. For example, some companies may market variations on 'Grand Tour of Europe'. This does not imply that Europe is being marketed as a single destination.

It is also important to view the purpose and actions of the various destinations National Tourism Boards. It's important to note how these NTB's work with their specific mission and collaborate with others stakeholders. This is particularly important when looking at third world markets, where joint promotion and packaging often is successful. This, together with travel and visa regulations, makes it easier to visit more countries during the chosen holidays. To collaborate with other NTO´s, requires a knowledge and acceptance in seeing how a countries success can be achieved by cooperating with the neighbour country, rather than be seen as its biggest competitor. The concept is called ”co-compete” and is seen as a way of viewing the strength in a diversified portfolio and subsequently a better guest experience. A good example of this is Icelandair, which offers on the same flight ticket a stay up to a week in Iceland, on your way to/from a destination. [11]This means that it is easy to go from the US and have a stop-over in Iceland on the way to any of their 28 European destination and be able to have a longer stay, with the same flight ticket in Iceland. The action is seen as good practice both in product development and communication/marketing.

A further example of this good practice of cross-boarder cooperation within Europe is the ”The Balkans” where Albania, Kosovo, Macedonia, in joint partnership, have started to work together in their communication and product innovation the region.[12] In this initiative, the countries are operating the distribution chain directly together, from education and business training for SME´s, inviting the leading media groups for fam-trips and organising B2B workshops globally. [13]

6.4 The one who knows the customer wins the most

Reverting to previous discussions that everything hinges on the best knowledge of the guest the saying goes – ”the one who knows the customer wins the most”.
This poses major challenges when the tourism industry consumers have early on adapted in new way to communicate, making it necessary to add knowledge of entrepreneurs continuously in order to keep up the ability in communicating with the guest. This is particularly so as we return to the need for skills development for entrepreneurs. It does not mean that it is the companies themselves who should manage its communication in all situations, but it takes knowledge to even understand the need to make use of partners and expertise in the communications field.

[10] http://www.etoa.org/
[11] https://www.icelandair.us/flights/stopover/?pos=US&lang=en
[12] https://www.youtube.com/watch?list=PLM8bF6fy45lAsHwR_M0vxPE4qSkLNLU3L&v=l55YjMpvtzc
[13] https://www.adventuretravel.biz/events/adventureweek/balkans/

Since communication for the tourism industry largely takes place through social media, guest experiences become transparent and become highly consumer-communicated. For companies, it is important to be where the guest already is, which has given great development for OTA and other business models, in an entirely new way, are able to handle booking behaviour and payment. Today, many travellers begin their journeys without having any pre-booked accommodation or transport, but do it along the way as they travel. For companies, this means a lot of uncertainty and difficulty in planning for staffing and purchasing.

Guests are also demanding the ability to communicate in real time with suppliers, which poses difficulties for small businesses, which are normally in the middle of a delivering there respective products. A disappointed guest today reaches larger numbers of potential guests through social channels, which in turn, can lead to catastrophic consequences for small business if something goes wrong from a customer's perspective. It therefore requires great understanding of guests experiences communicating, for every entrepreneur needs to deliver their message, yet at the same time how to handle any mistakes effectively when the todays consumers have less patience and the ability to move on to the next provider.

6.5 Recommendations for communication

We can try to ensure communications in Europe as a communicative ecosystem in which different stakeholders and levels has its role and purpose. If we start in a bottom-up perspective, we have compiled the following recommendations on how to successfully work with communication:

Recommendations for the SME level
As an entrepreneur in the tourism industry, it is important to know who your guest is and where they seek information. If a small business owner tries to reach the same level of international communication as larger companies, they run the risk of quickly getting lost in the crowd. SME's need joint efforts with those who also have the same guest market base and work together. It can be from a thematic perspective, target group or geographically, for example, two identical bike rental companies are not competitors until the day the guest decides which company they want to hire from. The entrepreneur can today, with smart and relatively simple means reach their guests through social channels. With the right message at the right time, SME's can cost-effectively reach a large group of stakeholders with precision, when offering the right preferences. As an entrepreneur, SME's should consider the following simple tips:

- First and foremost – formulate who is the guest, the driving forces for the guest experiences and where do they look for travel inspiration ideas? To know this, SME's should take the chance to ask their guests with simple questions or surveys, to gauge as much information as possible about the guests.
- It is important to assess the communication on the basis of a whole and to find a common thread, for example, how the guest will found out about the destination/product, booking, on-site, but to also enquire what happens after the visitor experience, such as feedback, new offers, etc.
- See who else is in the communication system, such as other similar entrepreneurs, destinations or regions. Remember that it is smarter to put money into joint marketing efforts, rather than buying singular adverts. A small business is seldom enough reason for a specific trip.
- To assist in segmentation / selection of communication. Bear in mind that for a digital agency to be able to help with a effective selection requires a "need to know" about a guest/market that is wanted to reach.
- Jettison the generics, in other words - ignore all buzzword expressions in communication that everybody else uses. [14]

Recommendations for regional and national level.

- Identify obstacles that make it difficult for the guest to reach the experience and focus on solving it. A powerful approach is to be a guest on his own destination, or alternatively employ "mystery shoppers" to see what does not work.

[14] http://www.rogerbrooksinternational.com/2011/06/02/jettison-the-generic%E2%84%A2/

• Most stakeholders today have well-developed web platforms and social media channels, but it is still challenging to understand how, as a guest gets from A to Z or where the best stops are on the walking tour. This applies even more so, when working with the mature audience, when the degree of limitation associated towards motivation determines where and how they travel.
Vague information, information was not clear regarding availability, requirements etc. can rapidly lead to decreased guest satisfaction. The challenge in this area is usually to supply the information by locals who live and work at the destination, where many questions remain unanswered, as they are self-evident to those who live there.
• Collaboration with other regions, according to guests wishes to create a stronger attraction.
• Focus on interests rather than the market, where people today increasingly prefer to socialize with people who share the same interest rather than geographic origin.

6.6 Communication challenges

Communication phenomenon has changed rapidly over the past 20 years, which nowadays it is the guest who decides what is communicated, how a brand is perceived and owners of trademarks and travel reasons in their ways to handle this phenomenon in varying ways of success.

The rules of the game before search engines were the ubiquitous tool to select the destination, when tour operators could create an image through a travel brochure, and word of mouth has long since passed. The mature generation are nowadays completely comfortable with the increased digitized world, using it to keep in touch with children and grandchildren. However, the degree of digitization varies largely in the world today, which is growing in importance, with those who have previously not travelled have a greater propensity to do so, due to better financial situation. With this in mind, a destinations role for tour operator remains important, as a secure supplier of composite travels.

The research publication ”Seniors' travel constraints and their coping strategies” describes the difference in the travel behaviours of a guests at a mature age, in comparison to the youth market. The main difference comes down to the fact that this consumer market lives in the knowledge that life is finite and that this removes the driving force for long-term goals, which are more quantitative rather than qualitative. The mature traveller gathers experiences that are here and now, where as material purchases do not carry same weight. These mature travellers also have less interest in meeting new social contacts, choosing rather to spend time with those they already know, or in many ways share the same perspective. This is an important aspect to carry in communication strategies towards the mature guest, particularly within product development. Within communication it is important to lift factors of accessibility and convenience frequently, as key parameters regarding the mature traveller. In a future perspective, it is therefore highly important to include it in the communication of travel reasons, and to use the existing platforms mature guests already use, such as TripAdvisor.

Immense changes have occurred since the inception of social media in the communication chain and today new tools for marketing are constantly being invented. Regardless, Word of Mouth (WOM) has long been one of the most important channels for successful communication. The big changes with the digitalisation is that today, WOM has become digital and accepted by viewers who messengers do not know, but share the same values and preferences. This has lead to the information being acknowledged and accepted as an ok source for reviews and advice. [15]

For businesses, it has become critically important in placing digital communication at forefront of marketing and communication, rather than using analogue communication in the means to spread information. The most important and common digital tools available is the smart phone, with communication messages being adapted to be in order to be delivered, understood and managed through the mobile screen. Customers are growingly demanding seamless solutions, being able to switch between different screens and applications. Business counts to being where the consumer is, let the consumer do your communication, and of utmost importance for the consumer; free wi-fi

[15] https://www.researchgate.net/publication/277304941_CURRENT_TRENDS_IN_MARKETING_COMMUNICATION_AND_THEIR_APPLICATION_TO_TOURISM

and network access. Communication is abuzz with digitalisation, online marketing, content marketing, social media etc but to get there, one needs to start with why. Regardless of the age group targeted, the need to find the reason why are they travelling is paramount. For all stakeholders within the any sector, the "why" needs to be very clear. This is the reason why demand is driven by "what you do" and also why the guest will want to visit. [16] As a strong tool within communication, this strengthens the "why factor" in building people driven brands. Where both citizens and guests together can create a brand as they see it, and also why tourists will choose to visit it. In this way the brand has a bottom up perspective with a strength revolving around real values. [17]

[16] https://www.startwithwhy.com/

[17] https://www.linkedin.com/pulse/harnessing-power-people-media-inspired-iceland-da%C3%B0i-gu%C3%B0j%C3%B3nsson?trk=prof-post

7. Results, policy recommendations and priorities for action

The main results and recommendations, both derived from the work that has been carried out within the EULSTIB initiative, as well as this report, can be summarised by the following 10 points:

7.1. Define the EU role and assignments of tourism development initiatives

The tourism industry comprises of a wide range of public and private stakeholders, directly or indirectly, connected in some way or another, to the tourism phenomena. The EU for the most part, has a supporting, developing and legislating function in relation to this industry, and the role regarding targeting specific issues within the industry, like seasonality for instance, could probably be more effective if clarified. The results from this report indicates that this role should focus on strengthening initiatives that gives the industry tools, methods and skills to ”help itself” and create long term effects that lasts once the projects have finished. The EU should not take the role to operate initiatives that intrude on activities that are better done by the industry itself, for example, marketing, product development, B2C websites, etc. The EU should rather focus on supporting the industry within financial means for business training, research and other initiatives that enables these activities.

7.2. Better learning processes between different initiatives and control of what has been done before

As discussed in chapter 2, a better system of learning from previous project results, before starting new ones would maximise the potential of new initiatives. Furthermore, when several similar projects are implemented at the same time, inter-project learning and communication between the projects is crucial in order to ensure a good exchange of experiences. Reinventing the wheel over and over again will not lead to the desired tourism development.

7.3. Focus on facilitating for the industry rather than supporting individual initiatives

Identifying and focusing on the tools, infrastructure, methods, structural changes etc. that are needed to facilitate the tourism industry, and not support individual initiatives, is an important factor in order to move forward and counteract tourism seasonality. The EU should, by focusing on relevant issues, support the conditions for SME’s to operate and improve their businesses, rather than create competition by supporting individual products, networks, platforms, websites, etc.

7.4. Identify the biggest obstacles and focus on solving them

The EU should, in cooperation with the industry, identify the biggest obstacles (legal, economical, social, etc.) of improving tourism flows in the low and medium season and give priority on solving these obstacles. Areas where the EU could make a difference, are for example, within the Shengan and VISA-area, creating easier means to travel to and within the area for third world countries. Supporting new innovative solutions for travelling within European countries, tax-reduction and accessibility regarding transport, such as train and air-transportation would make huge strides in this obstacle. Creating a safer travel experience, not just by increasing security rules, is a better means than merely adapting to the security risk.

7.5. Make the “best practice” easily accessible for the stakeholders.

One motto within communication since the digitalisation is – you need to be where your guest is – is easily applied to how we should work with best practice within the EU. The best practice, initiatives and innovative ideas need to be presented where the stakeholder that could learn from it already is. One of the crucial actions for a report of this nature, is to get the right people targeted with the right information, i.e., accessible information in the right channels. In all initiatives listed, a solid implementation plan for spreading the results and interaction with the stakeholders needs to be presented and managed. Furthermore, implementation needs to be done on local, regional and national levels, not on a European level. This needs to be adjusted to different stakeholders. Otherwise the best practice mostly risks to stay is within the inner circle of well-known EU-stakeholders.

7.6. Target and understand tourists by interest rather than age

Trying to understand and target seniors based on their age as a common ground has proven to be an ineffective approach. Seniors are as heterogeneous as any other age group and should rather be targeted as individuals based on their interests. While this group is still shown to provide important potential for smoothing out seasons, future initiatives should be designed from a better understanding of this segment. In addition, many seniors do not wish to engage in tourism especially designed to be age friendly, but rather participate in tourism on the same conditions as anyone (which might require higher levels of accessibility, comfort and safety, but does not necessarily have to be communicated as ”age friendly”).

7.7. Separating problems and solutions

A common misunderstanding seems to be the mix-up of problem-solution when discussing tourism seasonality. Low/medium season is to be regarded as the problem (resulting in uneven levels at the labour market, preventing a stable economic growth etc.), which has lead to numerous different possible solutions, rather than stimulating more travelling within the senior segment. This should be more clearly defined at the EU-level.

7.8. When to promote Europe as a single destination and when not to

This report has mainly geared towards the avoidance of promoting Europe as a single destination. The conclusion is mostly derived from three reasons: Firstly; that long haul markets desire to travel to *specific* destinations/countries in Europe, and do not mentally regard Europe as a single destination. Secondly, a great part of the travel in Europe is made *within* Europe, travelling between countries and regions. Thirdly, the strength in European countries as tourism destinations lies within its diversity, not similarities, and therefore is the factor that should be highlighted and communicated. Regardless, Europe should still work as a political destination, cooperating around different subjects as described before, facilitating structures and improve conditions for tourism where common interests exists.

7.9. Ensure that EU financial programs focus on what is truly needed

Future project calls around tourism development are estimated to create more positive effects, if they are more clearly built upon the actual needs of the industry and/or the market. Subsequently, they should focus on benefitting the right levels (see point 10) and strengthening the relevant stakeholders. Supporting initiatives that, for instance, creates transnational products or web-based B2C platforms that do not correspond with what the market actually wants or needs, will not create the desired significant and long-term effects. The same can be said, for example, collecting best practice – they will most likely not reach the SME’s who actually needs to read them, but stay in reports with different organisations, public stakeholders, DMOs, etc. By designing the EU financial programs within tourism geared towards strengthening SME’s own skill sets and expertise, a long term effect can be enabled where they get the right tools to take responsibility for their own success and growth.

7.10. Focusing on strengthening the SME’s own skills and expertise

Enabling the tourism SME’s themselves to develop and sharpen their businesses is, as a result, from this report considered a key success factor for industry growth. This bottom-up perspective where development starts from below is regarded as important to stimulate true motivation among the SME’s and gain long-term effects. The best method for doing this is considered to be by supporting business training programmes, networks, mentor programmes, etc. that focus on the actual needs and behaviours of tourists, that are innovative and future-oriented, research-based and are able to catch and motivate tourism SME’s. Furthermore, business development from a broad range of different areas is needed, for example market communication, product development, sustainability, accessibility, profitability, customer knowledge and how to effective.

Part II

8. Trends & Behaviour of the 55+'s

8.1 The mature consumer

When talking about the older population of travellers, it is important to bear in mind that they don't necessarily look or behave as traditionally thought of. The older generation of today can be classed as a "mature people", whereby they often talk about the third golden age, as a group of people with more energy, physical health and a stable economy that prioritizes continued mental and physical wellbeing.

The mature consumer is also estimated to be a sizable market, according to Euromonitors international data, the global population of 65+ is estimated to be around 626 million individuals in 2016, out of the global population of 7.3 billion. Characteristics of the consumer behaviour portrays this market as those who have retired from work, have the financial possibilities to travel, perhaps become entrepreneurs, working with hobby-related activities or advancing their retirement age. Of course to potential varies regarding for financial assets. However, it is a consumer that creates opportunities for the industry, where a number of individuals have already taken advantage of the potential of targeted offers and promotions. It is important to understand the diverse needs of this target group, whose needs and wants vary greatly from one individual to the next. Many of the older generation have high standards in their food and cultural experiences and it is of utmost importance to understand the desires linked to perceived good deals. The same applies with convenience, as age-friendly trips often involve long bus transportation methods or other types of sedentary guidance. This may be of best of intentions to be arranged to see as much as simple as possible, but equally pose a threat of a disappointed guest.

One clear feature, is that the mature population prioritizes and selects destinations that aid their economical resources to last longer. In addition to many well-paid pensions, there is a big group that do not have the same financial ability as others, and as a result choose to stay in places where the money lasts longer. This leaves an imprint of the economy, in terms of consumption as a whole, but also becomes apparent in the hospitality industry.

Previously, the digital acceptability of the mature generation has been an obstacle that has demanded that the industry needs to work in alternate ways to in the goal of reaching different audiences. The current trend clearly shows a digitally inclusive behaviour, where the Internet and social media have become a natural way even for the mature generation to keep in touch and plan their everyday life and leisure. An important aspect of this is that digitization means many elderly people now have an opportunity to better themselves, creating a greater acceptance in society, as it increases security and availability to friends and family. This development also means that the hospitality industry, in its application to the mature generation, must increasingly make available and assure the quality of their digital presence, at the same time have the information as an integrated part of product innovation. [18]

8.2 Adventure tourism

One area that continues to grow and build on its sustainable development of the tourism industry, is the so-called "adventure tourism". This type of tourism can in its simplicity, be seen as the opposite of mass tourism in its contribution to sustainable development from several aspects, notably social, environmental and economical factors. The UNWTO, in cooperation with ATTA (Adventure Travel Trade Association) has produced a report on what adventure tourism is, how it economically affects host destinations and in many ways contributes to preserve nature and culture, rather than exploit it. Which is usually the traditional concern for growth in the tourism industry. From a seasonal perspective, this segment is particularly interesting, since it mainly occurs outside the mass

[18] Euromonitor International, Top 10 global consumer trend for 2016, Daphne Kasriel-Alexander

touristic flows and destinations. Today, there is no exact definition of adventure tourism in UNWTO's literature, but the Adventure Travel Trade Association (ATTA) definition of adventure tourism is: a trip that includes a minimum of two of the following three elements: physical activity, the natural environment, and cultural immersion. Taleb Rifai, the UNWTO's Secretary General said

 "For companies and destinations, adventure travel attracts visitors outside of peak season, highlights the natural and cultural values of a destination, thereby promoting its preservation, helps differentiate the destination against the competition and creates resilient and committed travellers."

One of the most important aspects when we value the tourist industry's profitability is also to see how much of the money spent actually lands into the local economy. The United Nations Environment Programme (UNEP) has produced statistics showing that in most 'all-inclusive packages "mass tourism packages will put about 80% of the spending for flights, hotels and other international companies, from an estimated US $ 100, only 5 US $ of what is left, remains in the visited destination, a figure that varies between different places in the world. Based on an overview ATTA did in 2014, a total of 65.6% of the spent money of a trip, remained in the visited destination from an adventure package.

Adventure tourism is often based on local conditions, culture, nature and the local population. The result is then that tourism to the destination is more likely to strengthen the various aspects of sustainability. On the economic side, it is a marked difference in the amount of consumption that is actually left in the visited destination, this in turn means that the increase to employment and the social aspect is strengthened, but also affects the cultural aspect, as this is a chance that showcases a genuine and uniqueness of that location.[19]

8.3. Medical & health tourism

Another form of tourism with relevance for the older generation is medical or health tourism. This phenomena occurs when people travel with the intention of receiving some form of medical treatment, which can be anything from dental care to cosmetic surgery. Often, patients from more developed countries travel to less developed countries to access cheaper medical care, which is largely helped by cheap flights and internet sources of information.[20]

The availability of medical treatment (hospital, health center or similar) also holds relevance for age friendly travel as an important aspect of safety and accessibility. When choosing destination or hotel, existence of, or distance to, a health care facility might for some be a crucial element, especially for those with diseases or other health concerns.

As one example of a future growing segment where you take the mature generations demands regarding medical and health care in mind is "The GERAS project" in Cyprus, where they will set up a healthy ageing community, focusing on the 55+ generation as a place of part time or permanent residency, in a fully serviced environment, with a Greek village character.

In order to bring a social community effect to the village, GERAS offers medical, care and healthy ageing services as a ground foundation for attracting residents/guests. [21]

8.4. Seniors travel constraints

The article "Seniors' travel constraints and their coping strategies" presents a model for how different types of limitations and levels of tolerable constraint affects the mature traveller's choice of activities and destinations. Firstly, it showcases not only how to travel to the destination but also on the actual location. This affects both how we both work with accessibility of the experience,

19 http://cf.cdn.unwto.org/sites/all/files/pdf/final_1global_report_on_adventure_tourism.pdf
20 https://www.oecd.org/els/health-systems/48723982.pdf
21 Dr. Uwe Klein, Health Care Strategy Int.

product development and also communication towards the target group. In terms of communication towards the guest the choice of images and expressions plays a substantial role, whereby it is in the viewer's eye to be able to identify itself with the people in the picture. This in particular, poses a challenge, in that the mature audience becomes more difficult in many ways to achieve, since few people want to identify with an older audience.

From a product development perspective, it is important that the product owners understand the need to always be one step ahead with information, not to expose the guest of insecurity and / or uncertainties regarding different experiences. Examples such as the wrong information about the clothing requirements to participate in various activities, or guided tours unavailable in a guests own language are common reasons for the mature audience experience dissatisfaction, when they feel it´s limitations. Basically we will return, however, to the main problem but also the most important parameter - with the right information and knowledge of the guest / consumer supplier can adjust and provide the desired product.

9. Research focusing age-friendly and low season tourism

Tourism is often mentioned when discussing a regions future growth and development. Big potential is seen in the growing group of elderly travelling as well as in developing low season tourism. Also in tourism research have these factors been addressed. Below is an attempt to shed light on previous research focusing on age-friendly and low season tourism. The objective is to give some general knowledge and perspectives to facilitate recommendations in order to increase the competiveness of tourism during low to mid season destinations.

9.1 Age-friendly tourism

A considerable body of empirical evidence has been accumulated regarding the importance of travelling in later life. Researchers have explored a wide range of topics, such as understanding the travel decision-making processes among the elderly, comparing the travel behaviours of elderly tourists with those of younger tourists, identifying subgroups within the elderly market segment and investigating the effect of travel experience on elderly life satisfaction.

Over the past decades, models of active and successful aging have emerged in many countries as the foremost policy responses to challenges related to an aging population. Tourism is conceived as an important component in the quest for active living in later life. Research has shown that significant psychological and physical benefits can accrue from traveling. As life expectancies rise and large population concentrations enter their retirement years, accommodating the elderly is becoming a more and more significant factor in various businesses in the hospitality industry.

A growing number of elderly people are seeking active, fulfilling and adventurous travel experiences upon retirement. The tourism and hospitality industries have the potential to serve this lucrative market and make significant differences in the quality of their lives. In fact, movements related to aging have emerged. In many countries, the tourism industries have been seeking ways to ensure that their infrastructure and products are accessible to the elderly, and that they can enjoy the destinations with equity and dignity. To help cities become more “age-friendly,” the World Health Organization (WHO) in 2007 prepared a document called Global Age-Friendly Cities: A Global Guide. In recent years, specific tourist products targeting the elderly have been developed, such as medical and wellness tourism and root-searching tourism. Although the elderly constitutes a large and constantly growing market with significant buying potential, tourism offers for this age group are relatively limited due to its heterogeneity (i.e., differences in social economic status, health conditions, needs and interests, and travel experiences). This diversity may also explain the different conclusions from travel, leisure, and hospitality studies on the elderly population.

Kam Hunga and Jiaying Lub have in the *International Journal of Hospitality Management* (2016:53, pp 133–144) published a state-of-the-art article named *Active living in later life*, where they make an overview of aging studies in hospitality and tourism journals. During the last three decades they conclude that six of the main tourism journals have published altogether 52 articles focusing tourism and elderly. The articles define the elderly as slightly different, but is foremost based on the traditional chorological model using calendar years to measure age. It suggests 60–65 years old as the transition into late adulthood, and 65 years old and over as the age at which one is qualified to receive benefits according to laws. The main conclusion from most studies is the significant market size and purchasing power as well as demographic growth and forecasts of the elderly. It is also stated that this population demonstrates a strong purchasing power and that their consumer behaviours differ from other groups on the travel market.

One has to bear in mind that the group of elderly is not a homogenous group. Several researchers have suggested that the vacation-taking behaviour of the elderly market can be segmented into the 55 to 65 group, and the above-65 group, based on their income and health. In addition to age, other factors have also been used to segment the elderly groups, including reasons for travel, constraints, satisfaction and past travel experience.

A comparison aiming to show similarities and differences between elderly and non-elderly travellers concludes that older residents are generally as favourably disposed to tourism as their younger counterparts and they appear to enjoy many of the same events as the general population. No unusual facilities are required with the exception of those related to health. Furthermore, common type of pleasure trip taken by both groups is to visit friends and relatives. Also expectations regarding hotels, food and transportation are about the same. It is also stated that satisfaction with restaurant service is more important for the mature group than for the non-mature group, and thus mature consumers tend to be more loyal than others. To sum up the comparison; older travellers are in most ways just the same as other travel groups.

In conclusion, understanding aging in the tourism and hospitality contexts can be achieved in two directions: the elderly as an individual traveller and the elderly as a homogenous segment on the travel market. Based on the last decades tourism research it is logical, and strategic, to develop age-friendly tourism thinking about elderly as a rather heterogeneous group that has expectations and needs more strongly understood based on elderly as individuals and their travel locations rather than the segment itself.

9.2 Low season tourism

Seasonal variation in demand is a reality for most tourism destinations. Seasonality has long been recognized as one of the most distinctive features of tourism, and after the movement of people on a temporary basis, may be the most typical characteristic of tourism on a global basis. The phenomena has frequently been viewed as a major problem for the tourism industry, and has been held responsible for creating or exacerbating a number of difficulties faced by the industry, including problems in gaining access to capital, in obtaining and holding full-time staff, for low returns on investment causing subsequent high risk in operations, and for problems relating to peaking and overuse of facilities. Conversely, it has also been blamed for the under-utilization of these resources and facilities, often preventing tourism being accepted as a viable economic activity in many areas. It is not surprising, therefore, that considerable efforts have been made by both public and private sectors to attempt to reduce seasonality in destination areas through a variety of approaches.

Seasonality in tourism represents a key topic in academic literature. The topic has been studied for decades by several authors, as well as by policy makers of the tourism sector. In the case of tourism, seasonality can be defined as the temporal imbalance in the phenomenon of tourism, which may be expressed in terms of dimensions of such elements as numbers of visitors, expenditure of visitors, traffic on highways and other forms of transportation, employment and admissions to attractions. The number of tourists – that is, the arrivals or the presence of tourists – is a measure of the quantitative dimension of the demand, while their expenditures measure the economic value of the demand for the tourism destination. We can distinguish different causes of seasonality in tourism: natural causes, which are beyond the control of decision-makers (climatic factors such as temperature, sunlight, rainfall), and institutional causes, a combination of religious, social and cultural factors, which are partially under the control of the decision-makers (i.e. the schedule of school holidays or the planning and scheduling of festivals).

Seasonality has economic effects in terms of private and social costs that usually largely exceed the few benefits. The private costs are paid by each of the agents involved: private producers, final consumers and workers. Private producers (i.e. hotels, restaurants) yield a lower return on the capital invested if their investments are tailored to the peak-season demand, suffering from a high level of under-exploited capacity and fixed costs in the off-seasons. The final consumers of the destination, both tourists and residents, pay higher prices for any kind of product and service they buy in the peak season. The workers of the tourism sector typically accept seasonal jobs, without the usual protection required by labour contracts, and long periods of unemployment. However, under certain circumstances, tourism seasonality can produce some private benefits, for example, in rural areas, where tourism and agriculture are complementary, and in any destination where the rate of unemployment is high and the opportunity-cost of labour is low.

The social costs of seasonality concern local public utilities (i.e., water supply, waste management and traffic management) that, because of peak-season tourism congestion, cause dissatisfaction in residents and in tourists alike. Social costs are also tied up with the pressure of tourism on the environment that could be unsustainable for the destination if it overcomes the carrying capacity of the site, and can cause irreversible damage for present and future generations. On the contrary, in the case of really strong attractions (e.g. Paris, Venice or Barcelona) that usually do not suffer from seasonality but experience very high tourism pressure throughout the year, seasonality could bring some benefits because in the off-seasons the local communities could take a break, as it were, from tourists.

The empirical literature on the economic determinants of tourism seasonality looks at both the demand and the supply side. Empirical research, using official data on arrivals, identifies tourists' income, price (relative price and exchange rate for foreign tourists) and substitutes prices as determinants of the seasonal variation of the demand. Other determinants, like consumer characteristics and preferences, social and cultural interests, are mentioned; some of these characteristics (e.g., age, provenience) have been studied by several researchers.

Large disparities in visitor numbers and revenue for many attractions require innovations in product development and market diversification outside the peak tourist season to maintain adequate levels of turnover. For others, tough management decisions about the cost effectiveness and desirability of operating through the off-peak where demand is insufficient often result in partial or even complete shutdown. While a shutdown period may be planned by lifestyle entrepreneurs, others may seek to remain open throughout the low season. For policy makers and marketers, a supply of attractions open through the season helps in attempts to address seasonality of demand through marketing destinations in more innovative ways to new and existing markets, and thereby stabilise or grow regional economies.

10. The tourism industry – effects, statistics and seasonality

10.1. Estimated Effects on Labour Market and Economic Growth

“International tourism reached new heights in 2015. The robust performance of the sector is contributing to economic growth and job creation in many parts of the world. It is thus critical for countries to promote policies that foster the continued growth of tourism, including travel facilitation, human resources development and sustainability” said UNWTO Secretary-General, Taleb Rifai.[22]

This infographic, spread by the UNWTO and probably familiar to most professionals in the tourism industry, provides a clear idea of why tourism matters in the world economy.

Although these figures might appear already high, a lot more is still to expect in the coming years regarding the significance of tourism in terms of labour market and economic growth worldwide. [23]

10.1.1. How to Define Economic Impact of Tourism

The economic impact of tourism can be defined in different ways. For this report, the WTTC methodology of total contribution, taking both direct, indirect and induced impacts into account.

Definitions as described by WTTC (following information quoted from the report *Travel & Tourism Economic Impact 2015 World*[24])

Direct Contribution
The direct contribution of Travel & Tourism to GDP reflects the ‘internal’ spending on Travel & Tourism (total spending within a particular country on Travel & Tourism by residents and non-

[22] http://media.unwto.org/press-release/2016-01-18/international-tourist-arrivals-4-reach-record-12-billion-2015
[23] http://media.unwto.org/content/infographics
[24] https://www.wttc.org/-/media/files/reports/economic%20impact%20research/regional%202015/world2015.pdf

residents for business and leisure purposes) as well as government 'individual' spending - spending by government on Travel & Tourism services directly linked to visitors, such as cultural (eg museums) or recreational (eg national parks).

The direct contribution of Travel & Tourism to GDP is calculated to be consistent with the output, as expressed in National Accounting, of tourism-characteristic sectors such as hotels, airlines, airports, travel agents and leisure and recreation services that deal directly with tourists.The direct contribution of Travel & Tourism to GDP is calculated from total internal spending by 'netting out' the purchases made by the different tourism industries. This measure is consistent with the definition of Tourism GDP, specified in the 2008 Tourism Satellite Account: Recommended Methodological Framework (TSA: RMF 2008).

Total Contribution
The total contribution of Travel & Tourism includes its 'wider impacts' (ie the indirect and induced impacts) on the economy. The 'indirect' contribution includes the GDP and jobs supported by:

- *Travel & Tourism investment spending – an important aspect of both current and future activity that includes investment activity such as the purchase of new aircraft and construction of new hotels;*
- *Government 'collective' spending, which helps Travel & Tourism activity in many different ways as it is made on behalf of the 'community at large' – eg tourism marketing and promotion, aviation,*
  administration, security services, resort area security services, resort area sanitation services, etc;
- *Domestic purchases of goods and services by the sectors dealing directly with tourists - including, for example, purchases of food and cleaning services by hotels, of fuel and catering services by airlines, and IT services by travel agents.*

The 'induced' contribution measures the GDP and jobs supported by the spending of those who are directly or indirectly employed by the Travel & Tourism sector.

10.1.2. The 2015 Example

To make the estimated future effects relatable, here is a quick report on 2015's statistics regarding travel and tourism contribution to world GDP and and employment:

- The direct contribution to world GDP by travel and tourism was USD2,2 trillion. The total contribution, including indirect and induced effects, was USD7,2 trillion (almost 9% of total GDP). The sectors total contribution to world economy grew 3.1% this year, which is faster than the wider economic growth of 2.3%.
- Travel and tourism directly supported 108 million jobs. Including indirect and induced employment, the sector supported 284 million jobs, or 1 of 11 of all jobs in the world. Total contribution to employment grew by 2.6% this year.[25]

10.1.3. Estimated Future Effects – A Forecast to 2025

- The direct contribution of travel and tourism to GDP is forecast to rise by 3.9% pa, from 2015-2025, to USD3,593.2bn (3.3% of total GDP) in 2025. The total contribution in 2025 is forecast to rise by 3.8% pa to USD11,381.9bn (10.5% of GDP).
- Travel & Tourism direct support to jobs is forecast to rise by 2.0% pa to 130,694,000 jobs (3.9% of total employment) in 2025. Including jobs indirectly supported by the industry, this is expected to rise by 2.3% pa to 356,911,000 jobs in 2025 (10.7% of total).[26]

[25] http://www.wttc.org/-/media/files/reports/economic%20impact%20research/2016%20documents/economic%20impact%20summary%202016_a4%20web.pdf

World	2014 USDbn[1]	2014 % of total	2015 Growth[2]	USDbn[1]	2025 % of total	Growth[3]
Direct contribution to GDP	2,364.8	3.1	3.7	3,593.2	3.3	3.9
Total contribution to GDP	7,580.9	9.8	3.7	11,381.9	10.5	3.8
Direct contribution to employment[4]	105,408	3.6	2.0	130,694	3.9	2.0
Total contribution to employment[4]	276,845	9.4	2.6	356,911	10.7	2.3
Visitor exports	1,383.8	5.7	2.8	2,140.1	5.6	4.2
Domestic spending	3,642.1	4.7	3.7	5,465.0	4.1	3.8
Leisure spending	3,850.2	2.3	3.3	5,928.8	2.5	4.1
Business spending	1,175.7	0.7	4.0	1,679.0	0.7	3.2
Capital investment	814.4	4.3	4.8	1,336.4	4.9	4.6

[1]2014 constant prices & exchange rates; [2]2015 real growth adjusted for inflation (%); [3]2015-2025 annualised real growth adjusted for inflation (%); [4]'000 jobs

10.2. Tourism Statistics

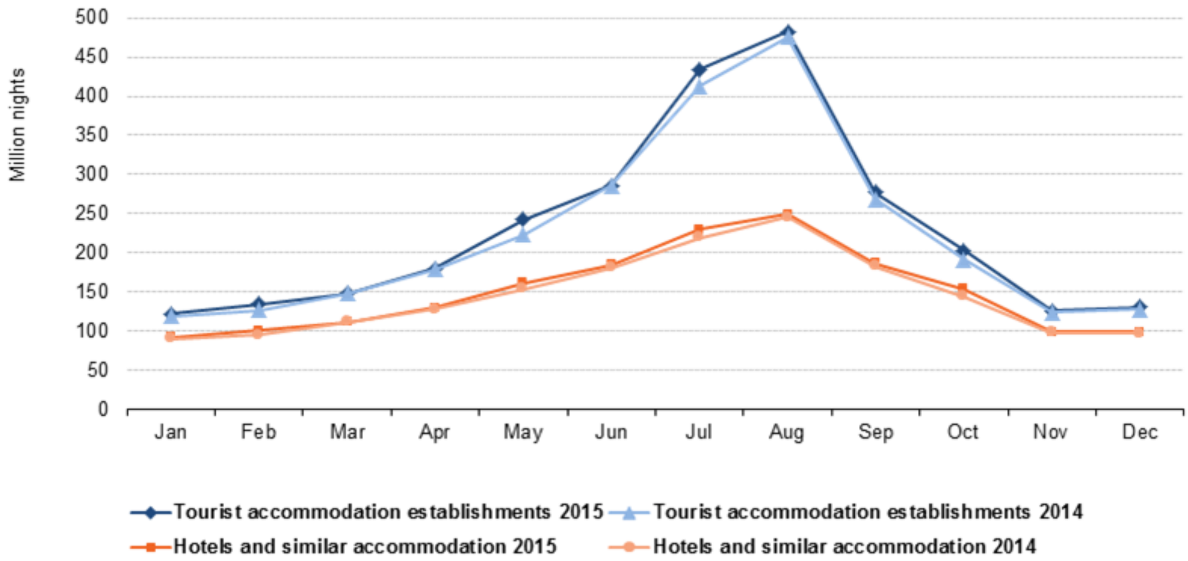
10.2.1. International Arrivals

International tourism arrivals grew by 4.4% in 2015 and reached a total of 1.184 million. This means 50 million more tourists compared to 2014 travelled to international destinations around the world. Arrivals in Europe 2015 reached 609 million, a growth of 5% compared to 2014.

"2015 results were influenced by exchange rates, oil prices and natural and manmade crises in many parts of the world. As the current environment highlights in a particular manner the issues of safety and security, we should recall that tourism development greatly depends upon our collective capacity to promote safe, secure and seamless travel. In this respect, UNWTO urges governments to include tourism administrations in their national security planning, structures and procedures, not only to ensure that the sector's exposure to threats is minimised but also to maximise the sector's ability to support security and facilitation, as seamless and safe travel can and should go hand in hand".[27]
(UNWTO Secretary-General, Taleb Rifai)

10.2.2. EU Statistics

Graph 1: Nights spent at tourist accommodation establishments in EU28 during 2015 and 2014:



Graph source: Eurostat[28]

This information indicates that the demand of tourist accommodation establishments in EU member states generally has a peak during the summer months (June-September). It also shows a general growth of nights spent between 2014 and 2015. This growth is also stated country by country in the following table, and also that EU in total experienced a growth of 3.2% 2014-2015.

Table 1: Nights spent at tourist accommodation establishments, January to December 2015 and January to December 2014

	January to December 2015		January to December 2014		2015/2014 change (%)	
	Tourist accommodation establishments(1)	Hotels and similar accommodation	Tourist accommodation establishments(1)	Hotels and similar accommodation	Tourist accommodation establishments(1)	Hotels and similar accommodation
EU-28(2)	2 765 922	1 795 696	2 679 479	1 741 632	3.2	3.1
Belgium	38 151(b)	18 962(b)	32 606	19 008	:b	:b
Bulgaria	21 398	19 655	21 698	19 983	-1.4	-1.6
Czech Republic	47 246	34 445	42 947	31 687	10.0	8.7
Denmark	30 811	15 020	29 647	13 780	3.9	9.0
Germany	378 991	272 511	367 054	263 393	3.3	3.5
Estonia	5 782	4 747	5 809	4 806	-0.5	-1.2
Ireland	:u	:u	:u	:u	:	:
Greece	96 030	74 466	95 116	73 952	1.0	0.7
Spain	422 065	308 237	403 722	295 344	4.5	4.4
France	413 602	208 226	402 246	201 894	2.8	3.1
Croatia	71 348	22 173	66 125	21 004	7.9	5.6
Italy	384 980	259 686	378 176	255 252	1.8	1.7
Cyprus	14 266	14 264	13 715	13 690	4.0	4.2
Latvia	4 110	3 374	4 158	3 308	-1.2	2.0
Lithuania	6 557	3 613	6 465	3 543	1.4	2.0
Luxembourg	:u	:u	2 868	1 699	:	:
Hungary	26 905	20 855	26 054	20 072	3.3	3.9
Malta	8 916	8 674	8 784	8 535	1.5	1.6
Netherlands	103 604	41 554	100 882	39 975	2.7	3.9
Austria	113 366	87 266	110 441	85 311	2.6	2.3
Poland	71 234	38 805	66 580	35 649	7.0	8.9
Portugal	55 527	48 891	55 310	47 672	0.4	2.6
Romania	23 442	19 746	20 230	17 317	15.9	14.0
Slovenia	9 899	6 583	9 223	6 232	7.3	5.6
Slovakia	12 111	8 361	10 780	7 308	12.3	14.4
Finland	19 778	16 113	19 801	16 003	-0.1	0.7
Sweden	54 715	33 909	52 280	31 074	4.7	9.1
United Kingdom	:u	:u	296 966	179 242	:	:
Iceland	6 711	4 120	5 490	3 287	22.2	25.3
Liechtenstein	112	91	132	110	-15.4	-16.9
Norway	31 653	21 666	30 314	20 435	4.4	6.0
Switzerland	:	35 628	:	35 695	:	-0.2
Montenegro	11 055	2 856	9 554	2 682	15.7	6.5
FYR of Macedonia	1 640	1 242	1 519	1 084	8.0	14.6
Serbia	6 619	4 373	5 954	3 858	11.2	13.4
Turkey	:	:	:	128 504	:	:

(1) Tourist accommodation establishments include groups 55.1, 55.2 and 55.3 of NACE Rev.2 (cf. Methodological notes).
(2) EU-28 aggregate for 2015: estimated for the purpose of this publication.
"b" - break in time series.
":" - data not available.
"u" - low reliability.

Table source: Eurostat[29]

[28] http://ec.europa.eu/eurostat/statistics-explained/index.php/File:Evolution_of_the_number_of_nights_spent_at_EU-28_tourist_accommodation_establishments,_January_to_December_2015_and_January_to_December_2014_(Million_nights).png

10.3. Measuring Seasonality in Tourism

10.3.1. A Selection of Indicators

At this stage, there is no uniform system of measuring seasonality patterns that is applicable on all kinds of destinations. There are, however, some different indicators at hand. Here, a selection of the most used indicators that have proven effective will be presented:

Arrivals (or Departures)
Fluctuations in arrivals is a way of describing a destination's seasonality patterns. The higher the variation of demand between different periods, the higher the seasonality (provided that businesses holds full availability all year round). Number of departures can also describe tourism seasonality in terms of variations of demand. By looking at the departures, domestic or outbound in a specific area (EU for instance), one can gain knowledge of travel patterns – when people actually take trips. This information does, however, not automatically coincide with seasonality on the supply-side, as residents might travel outside the measured area and also since arrivals from outside the measured area are not counted. Measurements of arrivals or departures are usually related to transportation (arrivals/departures at airports for example). This does however not take non-commercial transportation (private cars for instance) into account.

Nights Spent
Nights spent at tourism accommodation establishments is another way of measuring seasonality patterns. This does, however, not take non-commercial accomodation into account as tourists staying with friends and family, neither it is possible to count accommodation nights mediated at the accommodation C2C-market, such as couch surfing.

Pricing
Measurements and comparasions of prices (of accommodation, transport or other tourism-related businesses) over periods of time in a destination can provide an estimation of tourism seasonality periods. High prices indicates peak season (high demand) while low prices indicates low season (low demand). Prices are set high in peak season to benefit on the high demand, maximising revenues, while providing discounted prices during low season to stimulate demand.

Business Economic Indicators
Variations of demand can also be described by looking at tourism-related businesses' turnover or earnings between different periods. As the business' pricing might differ between different periods, this does however not automatically correspond to numbers of visitors, but still provides a fair idea of levels of demand.

Availability
Businesses tend to limit their opening hours or close their services completely during low season to avoid the risk of not covering their costs due to low demand. By looking at overall differences in service availability over time, an estimation of seasonality can be made.

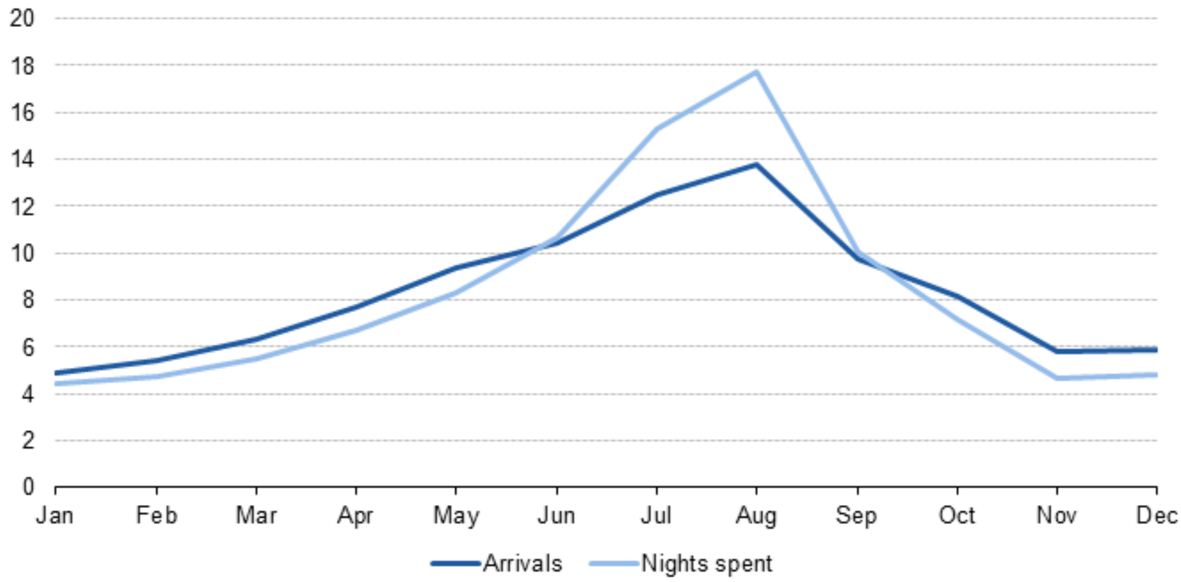
10.3.2. Seasonal Variations of Tourism Demand in the EU

The following graphs (nr 2-7) from Eurostat[30] illustrates the seasonal varations of tourism demand from 2014 in different EU countries. The statistics are here based on arrivals and nights spent in tourist accommodation establishment as method for measurement. However, seasonality in accommodation establishments turnover also correlates well with the occupancy, see graph 3. Graph 2 shows that the tourism demand in Europe is generally highest in the summer months of

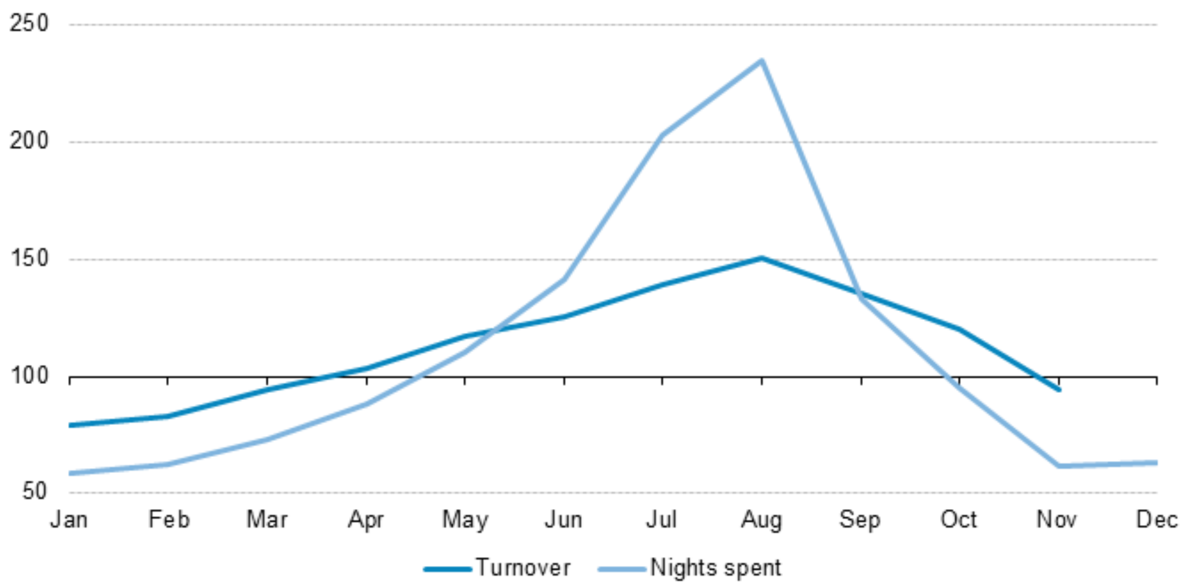
[29] http://ec.europa.eu/eurostat/statistics-explained/index.php/File:Nights_spent_at_tourist_accommodation_establishments,_January_to_December_2015_and_January_to_December_2014_(Thousand_nights).png
[30] All graphs: http://ec.europa.eu/eurostat/statistics-explained/index.php/Seasonality_in_the_tourist_accommodation_sector

June, July of August, peaking in the end of July/beginning of August. Graph 4, 5 and 6 shows seasonality patterns of countries with low, medium and high seasonality respectively, while graph 7 shows an example of a bimodal pattern with summer and winter peak. All figures demonstrates the complexity of seasonality and the local differences that applies in the EU. At an even more local level, for example in a city, variations of demand could differ between weekdays and weekends, creating a weekly seasonality. All this comes to show that while discussing tourism seasonality on an EU level, one must respect the local differences and not assume that all destinations generally are struggling with their visitors levels in a similar period. To include an even more extreme example, graph 8 shows the seasonality pattern from one specific winter destination.

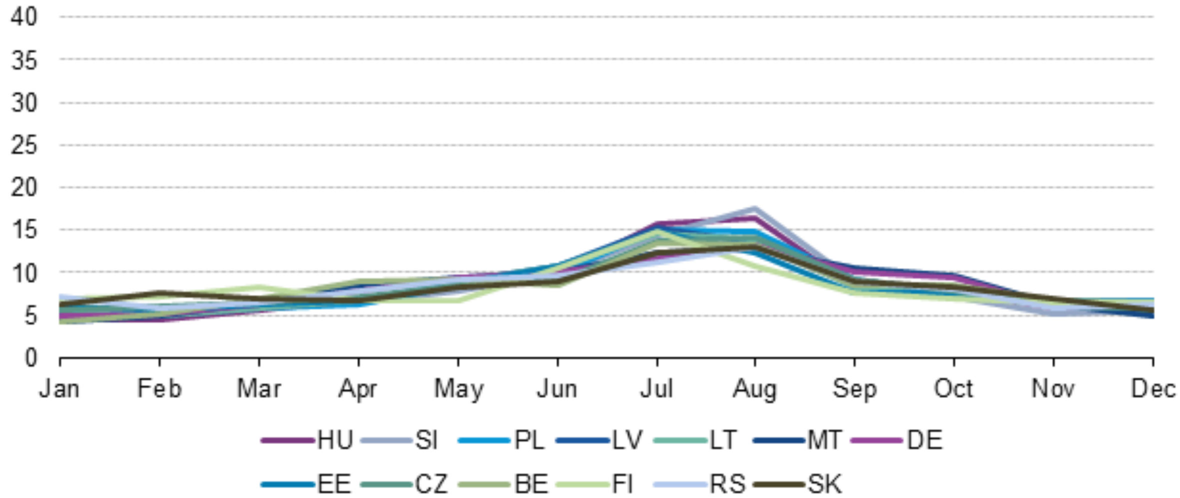
Graph 2: Monthly distribution of the total number of arrivals and nights spent at tourist accommodation establishments, EU-28, 2014, (%)



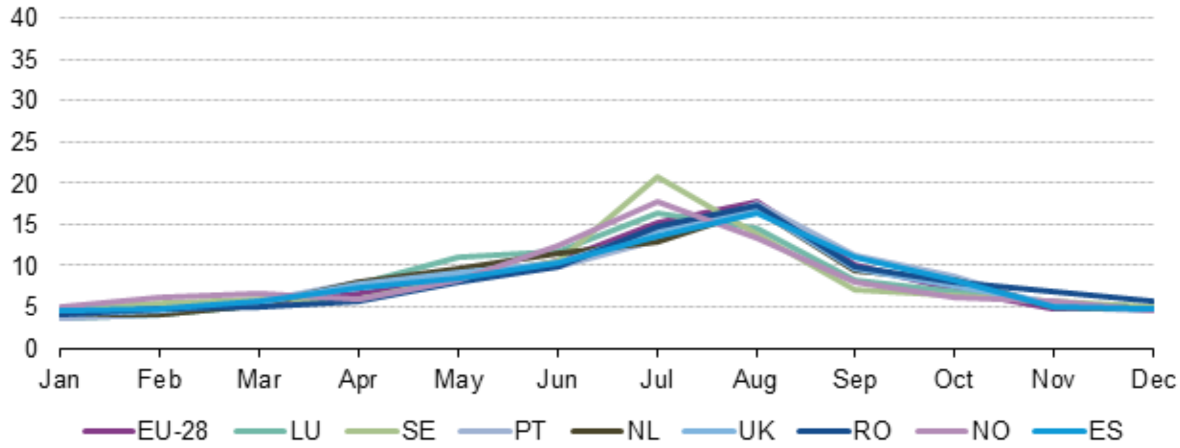
Graph 3: Monthly working day adjusted turnover and montly nights spent att tourist accommodation establishments.



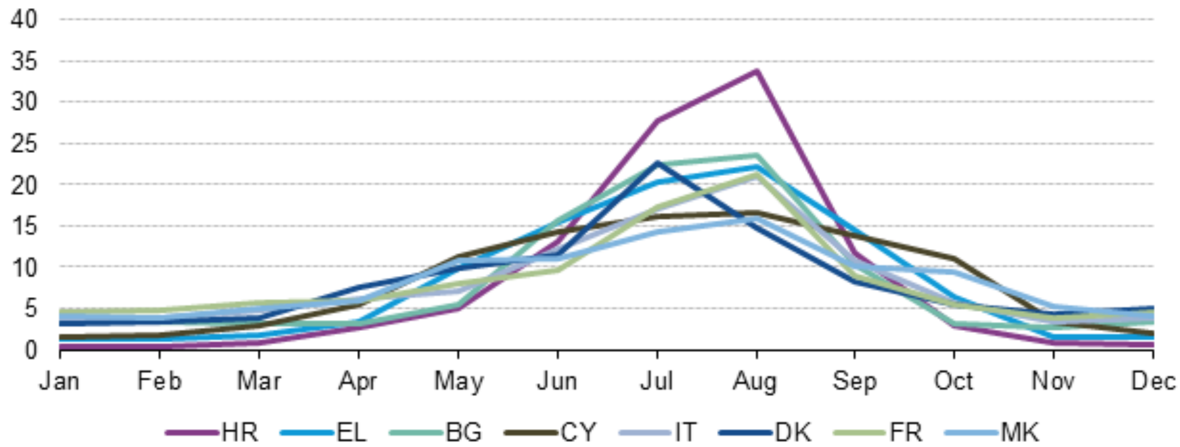
Graph 4: Monthly distribution of nights spent in tourist accommodation establishments (countries with low seasonality), 2014, (%)



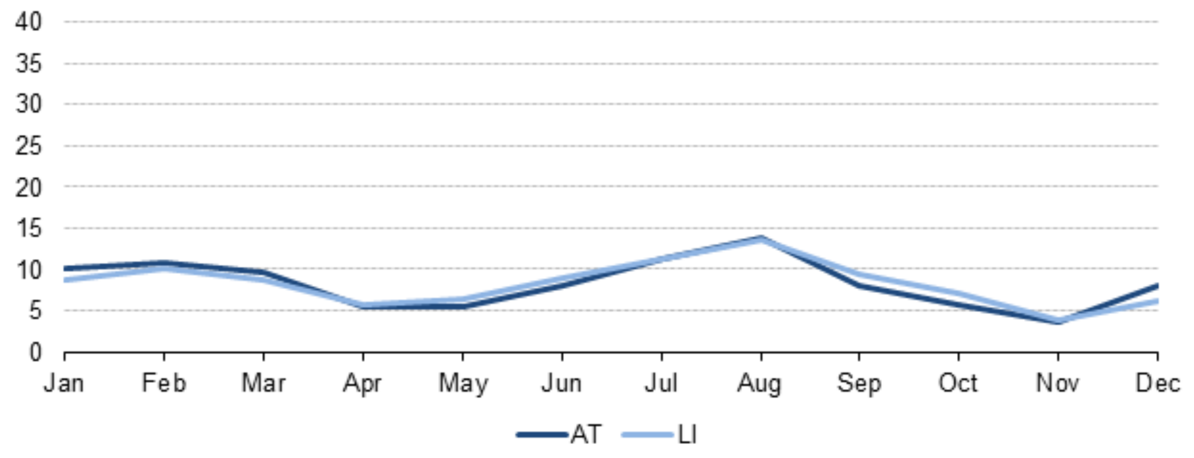
Graph 5: Monthly distribution of nights spent in tourist accommodation establishments (countries with medium seasonality), 2014, (%)



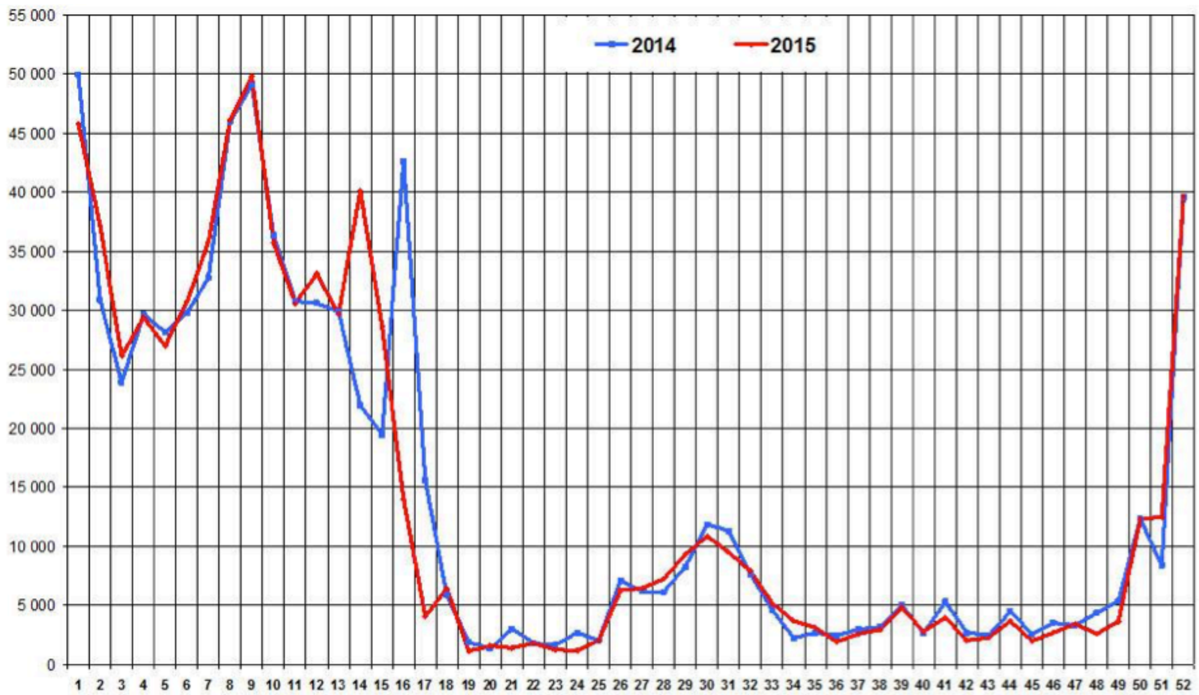
Graph 6: Monthly distribution of nights spent in tourist accommodation establishments (countries with high seasonality), 2014, (%)



Graph 7: Monthly distribution of nights spent in tourist accommodation establishments (bimodal pattern with summer and winter peak), 2014, (%)



Graph 8: Weekly distribution of nights spent in tourist accommodation establishments in 2014 and 2015 in a skiing resort. [31]



10.4. Estimated Potential of Tourism Demand in Low and Medium Season

10.4.1. Age-friendly Tourism during Low and Medium Season

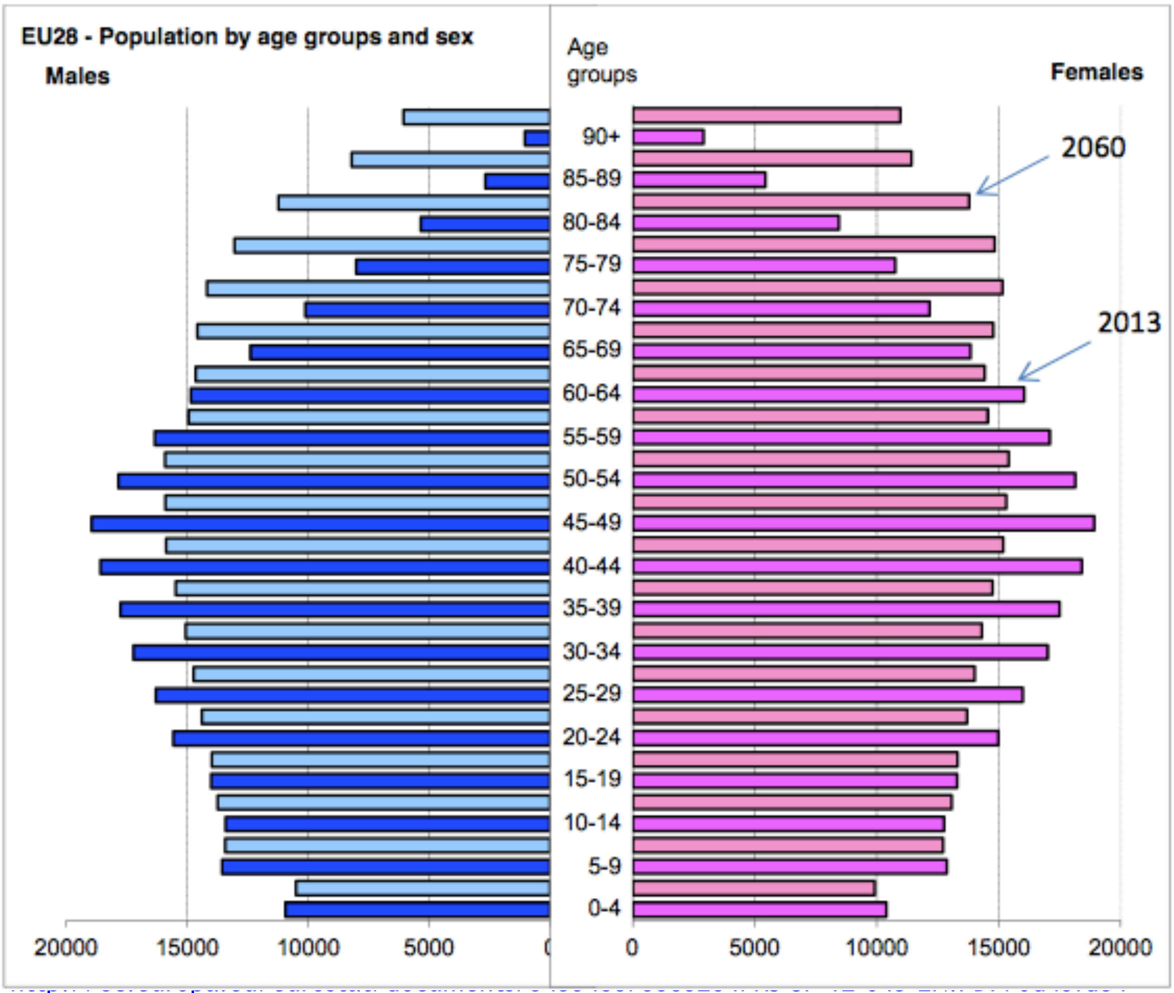
Tentatively, potential tourism demand in low and medium season can be discussed from two different perspectives. The first one is by potential demand from market segments that generally

[31] file:///Users/user/Downloads/%C3%85res%20utveckling%202000_2015%20%202016-04-13%202.pdf

are more available to travel off-peak season, such as seniors and youths. The second is demand on activities or motivations-for-travelling that are not season-bound, such as medical-, religious-, business-, cultural- and shopping tourism. In this report, as stated earlier, focus is mainly on the first perspective and in particular the senior market.

As previously described, seniors constitute a market than inholds potential in smoothing out seasonality in tourism, since they have resources in terms of both time and money to travel off-peak season. More to that, the interest of travelling among seniors is growing, something that has not least been confirmed by the participants in the EULSTIB initiative. This is also prooved in a study from 2012, made by Eurostat, showing that seniors in Europe, aged 65+, spent a third more on tourism in 2011 compared to 2006. Notably, this was also a period of financial crisis that affected the tourism industry, and the number of tourists decreased during this period of time in all age groups, except from +65, which instead had a growth of 10%. Still, a relatively low share of the 65+ participated in tourism during these years (46% compared to 52% of the population in general). This might mean that this age group still has important growth potential.[32]
The fact that seniors are expected to constitute a much bigger share of the total population in the future is also a reason to target this segment in tourism to ensure future economic growth. According to Eurostat EUROPOP2013 data, the EU population is by 2060 projected to be slightly larger, but much older than now. The proportion of young people (aged 0-14) is projected to almost remain constant by 2060 in the EU28 area (approximately 15%), while those aged 15-64 will become smaller (from 66% to 57%). The +65 group will on the other hand become much larger, from 18% to 28% and the share of the +80 group will increase from 5% to 12%. This population ratio is also described in graph 9, by Eurostat:[33]

Graph 9: EU28 Population by age groups and sex



d6ad-4584-a800-2ac868f17e0c?version=1.0
[33] http://ec.europa.eu/economy_finance/publications/european_economy/2014/pdf/ee8_en.pdf

But do seniors want to travel in the low and medium season? In the previous mentioned ESCAPE project, an attempt to reply to this question was made. A tailored questionnaire was carried through in order to gather some basic needs and expectations of tourists aged 55+. 904 tourists from over 20 contries replied to this questionnaire, and one question was about in what season they preferred to travel.[34]

Q10. When do you prefer to travel?		
Answer Options	**Response Percent**	**Response Count**
a) Spring	31,8%	375
b) Summer	36,6%	431
c) Autumn	16,1%	190
d) Winter	5,0%	59

Even though summer was the most preferred season (almost 37% of respondents), travelling in spring was nearly as appealing (almost 32% of respondents). As discussed before, tourism seasons differ a lot locally, but seen from a general EU perspective, where peak season generally occurs in the summer months, the information that many seniors actually wishes to travel during spring (autumn not appearing so badly either) can be seen as encouraging.

10.4.2. Forecasting Tourism Arrivals in General

According to UNWTO's report *Tourism Towards 2030*, the number of international tourist arrivals worldwide is expected to increase by an average of 3.3% a year over the period 2010 to 2030 (2.3% in Europe). In absolute numbers, international tourist arrivals will increase by some 43 million a year, compared with an average increase of 28 million a year during the period 1995 to 2010. At the estimated rate of growth, international tourist arrivals worldwide are expected to reach 1.4 billion by 2020 and 1.8 billion by the year 2030. International tourist arrivals in the emerging economy destinations (such as Central and Eastern Europe) will grow at a double rate (+4.4% a year) of that in the advanced economy destinations (2.2.% a year).[35]

10.4.3. Planned Initiative: Silver Economy Study

A deeper study on the potential of the "silver economy" is planned to be implemented in March to February 2017. This study will:

- Provide an **estimation of the potential size** of the European Silver Economy from now until 2025 in terms of markets, economic growth potential and GDP impacts.
- Provide an overview of current and planned Silver Economy related **initiatives** in Europe.
- Develop **ten most promising cases** within the European Silver Economy where innovation can create new jobs and economic growth, while helping to address the societal challenge of demographic change.
- Develop **policy recommendations** at EU level regarding how to best grow the European Silver Economy.

[34] http://www.age-platform.eu/images/ESCAPE_Needs_and_expectations_FINAL.pdf
[35] http://www.e-unwto.org/doi/book/10.18111/9789284416899

11. Overview of previous, current and planned initiatives

11.1. Current projects and initiatives

11.1.1. Tourism Destinations Crossover (DiscOver55)

The project targets four areas: Montepisano (Italy), Lake Saimaa (Finland), Vulkanland (Austria) and Izola (Slovenia), all susceptible to attract a stable international flux of senior travellers in the near future also in low and mid season. Based on the ex-ante assessment and SWOT analysis performed prior to proposal submission, the project DiscOver55 intends to build an innovative transnational tourism product for European senior audience. The indicators to be used to assess the four destinations will be chosen from the E.T.I.S. (The European Tourism Indicator) System of the European Commission. The common theme for the four destinations is “Water for Wellbeing”.

11.1.2. EDEN55plusNW

Developing the network of tourism products for seniors – building a cooperation along the tourism value chain for EDEN destinations in partner countries for EDEN destinations in partner countries for more competitive and sustainable growth (EDEN55plusNW)

The project EDEN55plusNW aims to upgrade the excellent networking concept of small, diverse, rural EDEN destinations in EU countries. The tourism product Transnational Mobility Model for Seniors in Pilot EDEN Destinations with the slogan “Slow down to feel the life in EDEN destinations” connects four neighbouring countries and five pilot EDEN destinations in Austria, Slovenia and Croatia and will develop four cross-border tourism products which will be tested by two groups of seniors from Italy. The main focus is to design suitable cross-border tourism products in pilot EDEN destinations for seniors 55+ (women and couples) to increase tourism flows in low/medium seasons in pilot (and later on in other) EDEN destinations by removing obstacles along the tourism value chain and increasing investment opportunities for the tourism industry, SME’s and businesses in Europe and on the international level.

11.1.3. Europe for Seniors (EUROSEN)

The proposal develops the senior tourism in low season according to the needs, stressed by the senior citizens, for a cultural tourism of socialization. The central theme of the trips lies In the researching of their own roots and the connections with the others’ experiences in the framework of the common European identity.

The senior visitors meet the senior hosts in “minor” destinations with touristic potential, organized in Clusters of Local Culture, where they have a full immersion into a relational, thematic, participative, experiential tourism linked to the territory identity and values. The CLC are included into itineraries connecting major destinations, designed by tour operators, but develop themselves a capacity of touristic services.

Comments by project representative
The most important results that the project representative wishes to gain from the implementation of the project are that non-touristic territories will become touristic destinations, organised in Clusters of Local Culture where the senior tourists meet the senior hosts and the local community and have a full immersion in the local culture. Also that senior groups start to travel out of season visiting not only major destinations but also the CLC and that touristic SME of the CLC improve their international action. The tourism SME’s at minor destinations will benefit from the project by improving their ability to deal with international tourists. The project differentiates from previous projects by, for example, taking care not only of the needs of senior tourists but also those of the hosting seniors. Also, the hosting seniors lead the organization of the Clusters of Local Culture and create and revamp activities and performance, participated by the guests, taken by the local

heritage, documented and explained. This framework will explicitly enhance the local identity of the territory and its above expressions. The promotion of the packages, including both famous destinations and CLC, are promoted towards the senior associations and the Tour Operators specialized in seniors' travels of Europe, thanks the contacts of AGE platform which is an associations gathering hundreds senior associations in Europe.[36]

11.1.4. FOREVER YOUNG! (FY)

"Forever Young!" will enhance transnational mobility by designing routes and products, based upon local cultural UNESCO heritage (immaterial and material such as oral traditions, monuments, Mediterranean dietary etc.) in association with the promotion of local typical food and beverages in order to provide an unique learning experience: "living the culture".

11.1.5. Enjoying central European gardens and parks (GARDEN ROUTE)

The central aim of the project is to develop new transnational tourism product for senior citizens (any person over 55 years old) who are looking for a tranquil place to relax and take some time out in green spaces where nature is perceived to invigorate the body and the soul. The beautiful parks and gardens of Europe are a great way to offer that through mixture of history and leisure. The product will enrich the cross-border tourist offer and facilitate tourism flows especially during medium seasons in the EU, stimulate the competitiveness of the local SME's, improve public and private transnational cooperation among actors along the tourism value chain and help improve the living conditions of the local populations. The Garden Route will run through 4 central European countries. The current project will bring together relevant stakeholders from cross-border regions along the route in Slovenia, Austria, Hungary and Croatia.

11.1.6. Improving senior tourism on small medium lakeside towns in Europe (LAKtive Tourism)

Creation of a specific tourism product focused on senior target groups (over 55) travelling in low/medium season to small lakeside towns. The package will be developed tailor-made for each destination, based on a basic concept and enriched with several special collateral activities. The LAKtive Tourism project will be proposed and developed in 6 towns situated on beautiful lakes representing 5 European countries (Italy, Rome, Slovenia, Ireland and Spain).

11.1.7. Please Let Enjoy A Seniors Experience (PLEASE)

Seniors aged 55 to 70, who are already retired and living off a pension are available to travel in low-medium season. The new touristic offer provided by the project will be organized in terms of sharing economy, according to the project requirements but respecting the customers expectations, except for international transfer, that will be provided through standard air carriers. The Senior target will also be trained to experience the self booking activity on the web, becoming the "Maker" of its own touristic product. The project will be carried out in 5 EU Countries (Italy, Spain, Greece, Bulgaria, Malta).

11.1.8. Senior ENhancing Intangible and INTERgenerational in Europe during the low season and medium season (SENINTER)

The project SENINTER proposes the creation of a slow and sustainable tourism product targeted and adapted to the seniors travelling with their grandchildren during the low and medium season in Europe. The children are preferably less than 6 years old, which means that they are quite free to

[36] EUROSEN Project representative. E-mail interview 2016-05-12.

travel. The seniors are preferably retired in order to travel out of the high tourism season which means that they are from 55 years old and more.

11.1.9. Seniors on Reciprocal Tourism (SORT)

SORT refers to the abbreviation of the Seniors on Reciprocal Tourism title. It concerns a multilateral project with 8 EU partners from 7 countries of South Eastern Europe. The central idea is to design, trial, evaluate, document, diffuse and valorise a new touristic package and service for tourists over 55 years old. The main objective is to facilitate the mobility of the elderly towards the partners' local communities by giving them the properties of a wanderer-guest, as well as of a volunteer. Within project framework partners will elaborate different local hosting programs for seniors and for the local community, will test them in pilot applications and will assess and evaluate the results. Finally they will develop a guide containing the description of the whole process.

11.2. Previous projects and initiatives

11.2.1. The Europe Senior Tourism Programme

(*This part is mostly derived from the "Assessment report on the economic and social impact of the "Europe senior tourism project, 2014,-2015".*[37])

The Europe Senior Tourism programme follows the European Commission's line of work in regard to tourism, as evidenced by the various parallel initiatives that have been developed within the scope of the Commission.

The Calypso Preparatory Action was launched in 2009. The aim of this initiative was threefold: to facilitate access to tourism for the disadvantaged sectors of society, to fill in the gaps that occur in the months in the low season, and to promote the concept of European citizenship through tourism exchanges. The target groups were seniors and retirees, young people, disabled adults and families with social difficulties. Calypso was implemented through several actions. After a call for proposals, awards were granted to ten projects with different models of bilateral and multilateral exchanges supporting and promoting travel for the Calypso groups outside the high season. Another major project funded by the EC was the B2B e-Calypso platform (www.ecalypso.eu), a web platform to facilitate transnational tourism exchanges, particularly in the low season. Created in 2013, it groups the organisations/institutions involved in travel management for the Calypso groups with accommodation providers. It is also a hub offering the agents of European social tourism publications, good practices, news and general information on social tourism.

In May 2012, the Commission launched the pilot phase of the Senior Tourism Initiative, with which it sought to define the framework conditions to improve transnational travel outside the high season for seniors in Europe. The aim is to promote tourism outside the tourist peaks so as to stimulate economic growth and employment in Europe and contribute to the competitiveness of the industry. The European Commission has identified seniors and young people as groups that can travel easily during the low season and therefore represent an opportunity for the sector. Three calls for proposals have been developed within the scope of this initiative: the first in 2013, with four projects (only for seniors); the second in 2014 (seniors and young people); and the period for the submission of projects for the last closed in June that same year (seniors and young people). In 2015, the call "Supporting Competitive and Sustainable Growth in the Tourism Sector" was also launched, including the themes increasing tourism flows in low/medium seasons for seniors and youth target groups. The awarded projects will start during 2016 and are described in this chapter under "2.2. *Current projects and initiatives*".

The Senior Tourism Initiative also included the preparation of the report entitled "Facilitating cooperation mechanisms to increase senior tourists' travels within Europe and from third countries in the low and medium seasons" based on which an action plan was developed, and after

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[37] SEGITTUR, *Assessment report on the economic and social impact of the "Europe senior tourism project, 2014-2015*, p. 8-10.

consultation with the public and private sector, the European Union Low Season Tourism Initiative Board (EULSTIB) was set up for the period 2015-2016. This body is responsible for defining the roadmap and ensuring the orientation, coordination and monitoring of the activities carried out within the framework of the action plan in close collaboration with the Commission. The committee was formed by experts selected from governments, the private sector, the European industry, the academic sector and civil society.

In June 2015, the EC held “Workshop on low/medium season tourism for seniors and youth in Europe” in Brussels. Aimed at promoting the exchange of points of view and good practices between public and private European actors, the meeting also discussed the opportunities for the senior and youth sectors, and the attractiveness of international markets (China, Brazil and the United States) in relation to the challenge of seasonality in tourism.

In February 2016, the conference ”Europe: The best destination for seniors” was organised in Firenze, Italy, where the projects ESCAPE, Senior Rail Travel Project, SENTour Connect and SenGor were presented (see descriptions below).

11.2.2. ESCAPE

The “European Senior Citizens’ Actions to Promote Exchange in tourism” (ESCAPE) project brings together 8 partners from 6 different countries who have joined forces with the view to work on the enhancement of the existing tourist infrastructure and staff in the low season, facilitating as such transnational exchanges off-season by concentrating on the senior citizen market, those falling in the 55+ age range. The project covers the geographical areas of Belgium, Bulgaria, Cyprus, France, Italy and Portugal proposing a partnership of eight organizations whose activities and services provided include the field of tourism and senior citizens interests. The ESCAPE partners propose innovative and sustainable transnational tourism packages for travellers over 55 years old, in order to increase tourism flows in Europe off-season, and promote Europe as a continent of attractive, quality and safe destinations all year round. Around 10 such packages will be developed and pilot tested covering transnational exchanges between Bulgaria, Cyprus, France, Italy and Portugal.[38]

11.2.3. Senior Rail Travel Project

The Senior Rail Travel Project aims to facilitate pan-European mobility of mature travellers by rail, by developing innovative and sustainable tourism packages that are tailor made for the target group and their needs. The project follows customer focused “Service Design” approach that analyses a given problem from the customer’s perspective, observing and interpreting their needs and behaviours, in order to transform these into potential future services. Based on this, Interrail Tour travel packages have been developed including all elements of the travel journey, from mobility by train all over Europe, to accommodation and cultural offers.[39]

11.2.4. SenTOUR Connect

The SENTour Connect Project, created under the Call for proposal for facilitating low season travel for seniors, is built to develop sustainable solutions for the tourism industry in multiple destinations suitable for the full scope of potential senior travellers, regardless of their travel experience. The objectives are to study and develop mechanisms supporting transnational stakeholder cooperation, improve tourism seasonality patterns across Europe, create innovative and sustainable transnational tourism packages for seniors and strengthen public-private partnerships.[40] The work packages includes investigate and exchange knowledge and product development, package development and

[38] http://escape2europe.eu/escape-project
[39] http://www.interrail-tours.com/about
[40] http://www.ecalypso.eu/steep/public/section.jsf?id=132

eCalypso integration and training, package/pilot exchange tests and assessment and promotion and dissemination of European Tourism as an asset to European citizen participation.[41]

11.2.5. SenGor - Seniors go rural

The project focus on defining a generic Operative Model to generate and market products based on individual arrangements that facilitate transnational tourism flows of seniors in low season to rural micro- and SME's and their destinations. In order to create tangible or bookable products, they need to be specified in detail for every concrete implementation. Flexibility of the Operative Model to define any kind of tailor-made tangible products is intended, the project includes several of such pilot product implementations.

The Operative Model consists of two transnational components that establish a common framework for generating real products:
(1) Guidelines for a "Senior-friendly" product accreditation "Seniors Go Rural. This accreditation, with a content agreed and supervised by the representative transnational organisations EuroGites and AGE Platform, sets specific criteria for rural tourism hospitality services and destinations to receive Seniors. It is complemented by Guidelines for rural tourism businesses on the preparation of products that are adequate to senior needs.
(2) Operative Systems for promotion, sales, and clearing such as off-season voucher, discount / club card, or similar. The accredited senior-friendly products will be made accessible for Seniors by means of agreements that regulate promotion, sales, and payment in a homogeneous way across Europe. They will have the format of framework agreements; for practical application, these framework agreements will always require a separate specific adaptation to be closed between affiliated organisations of AGE and EuroGites. However, homogeneous basic procedures and rules are always maintained across Europe and for all implementations.
The complete Operative Model – from definition to implementation – is a B2C solution, based on the direct responsible involvement and self-regulation of the interested parties. The Public Administration participates at the side of beneficiaries (through social support to senior organisations), or at the receptive side (NTOs and DMOs) in the setting up and running of the system. [42]

Silver suitcase
A product development guideline for rural tourism products aimed at active seniors +55 was made in the project. This was developed from a rural tourism product criteria, discovered by a feasibility study, made within the project with special attention to low-season requirements. To promote and sell the products, the "Silver suitcase" member card was developed. This system is based upon agreements between rural tourism service providers and a rural tourism marketing organisation, where Senior Tourism Organisations can distribute the cards to their individual seniors. The operative model of the card is specially designed to motivate and support senior low-season travel.[43]

11.2.6. AGE-platform

AGE Platform Europe is a European network of more than 150 organisations of and for people aged 50+ representing directly over 40 million older people in Europe. AGE Platform Europe was set up in January 2001 following a process of discussion on how to improve and strengthen cooperation between older people's organizations at EU level. Membership is open to European, national and regional organizations, and to both organizations of older people and organizations for older people.

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[41] L. Gobin, SENTour Connect Project: https://www.google.se/url?sa=t&rct=j&q=&esrc=s&source=web&cd=2&ved=0ahUKEwi_zrH4gdLMAhUCKpoKHWpPCaYQFgglMAE&url=http%3A%2F%2Fec.europa.eu%2FDocsRoom%2Fdocuments%2F6909%2Fattachments%2F1%2Ftranslations%2Fen%2Frenditions%2Fnative&usg=AFQjCNFEu7vGu_XCNFjiPM2pNX-JIZJKnQ&bvm=bv.121658157,d.bGs
[42] http://www.celotajs.lv/cont/prof/proj/SenGoR/Sengor_eng_active.html
[43] http://www.celotajs.lv/cont/prof/proj/SenGoR/Results/Sengor_product_guidelines_EN_FINAL.pdf

11.2.7. TOURage

The project has grown out from the idea that although Demographic Change brings many challenges it can also bring opportunities to the regions. Tourism is one of the fastest growing industries in Europe and relatively remote regions have both a lot of unexploited and unknown development potential in this regard. The project seeks to identify good practices on developing tourism possibilities for growing segment of elderly travellers.

The results gained in this collaboration will be essential instrument to communicate to the rest of Europe the means by which "The Senior Tourism Model" can be created and enhanced and also what kind of tools can be used to improve Regional Senior Tourism Policies. The overall objective of the project is to enhance regional economy by the means of senior tourism development and to support active and healthy ageing. The project aims to enlighten the responsible personnel of regional authorities, decision-makers and politicians in the field; its challenges and benefits, its future and trends and above all good practices exchanged and deployed.[44]

11.3. Planned projects and initiatives

11.3.1. The Silver Economy

The silver economy, is an on-going study that will be presented in the beginning of 2017. The main objectives of the report is to provide an estimation of the potential size of the European Silver Economy in terms of markets, economic growth potential and GDP impacts from now until 2025. The report will present an overview of current and planned Silver Economy related initiatives in Europe. Its planned that these projects shall develop ten promising cases within this economy, where innovation can create new jobs and economic growth. Finally they shall develop policy recommendations at EU level regarding how to best grow the European silver Economy. The study is being carried out by Technopois Group, Oxford Economics and CBased.

[44] http://www.tourage.eu

12. Good practices of business training programmes

In this report, five examples of good business training programmes will be presented. The selection of presented programmes is made to show examples that have proven successful as well as being a diverse mix (both geographically and thematically). Needless to say, there are many more at hand and a listing of more good business programmes can also be found in Annex 1, but this list is meant to give an idea of the wide range of suitable programmes. Businesses are recommended to consider what kind of training is needed to improve their quality and search for suitable local alternatives.

12.1. Kurbits Business Development program, Sweden

Kurbits is a national business development program, specially adapted for the hospitality industry. The program process spans a 6-month period, with one meeting per month, under the guidance of a specially trained process leader. Meetings are held in a workshop format, alternating new information with inspiration, cases and tools. External speakers and experts are also invited to the meetings to share their knowledge and experience. Between meetings, each participant receives personal coaching on-site at their respective businesses and work with concrete tools to help them put words into action. Kurbits was developed in 2008 by The Regional Development Council of Dalarna County in cooperation with the University of Dalarna and the Swedish Travel and Tourist Industry Federation (RTS).

For more information: http://www.kurbits.org/en

12.2. AdventureEDU, Adventure Travel Trade Association, International

AdventureEDU provides training for governments, associations and individual companies seeking to deliver the best adventure travel experiences in a safe and sustainable practice. The program focuses on areas such as who is today's adventure traveller, what recent changes in the adventure industry mean for businesses and destinations, how to improve the quality and safety of adventure travel experiences, how to assess resources and construct distinctive adventure travel experiences, how to manage adventure tourism business risk, how to create the best online and offline marketing strategies for adventure businesses and how to bring public and private partners together to foster a thriving market. Training is offered by in-destination training, expert designed online courses, partner training programs and educational webinars.

For more information: http://www.adventuretravel.biz/education/adventure-edu/

12.3. Q Label, Belgium

A programme to drive up standards and performance in the hotels, restaurants, attractions and leisure businesses along the Flemish coast. To ensure that standards and performance levels continue to be pushed up in the long term, a key group of business coaches are trained – a team of hospitality and tourism professionals from across Belgium – to run and administer the scheme. The results have been impressive – by July 2014, over 150 tourism businesses had been awarded the prestigious 'Q Label' quality standard and the scheme continues to go from strength to strength.
For more information: http://www.westtoer.be/nl/q-label

12.4. Authentic Bulgaria

A development project that has the potential to build entrepreneurial skills and simultaneously, provide a suitable market response to the (latent) demand for alternative tourism products. Authentic Bulgaria is a network of quality certified independent hotels, guesthouses and bed and breakfasts throughout Bulgaria. The initiative is funded by USAID (United States Agency for International Development) and currently has some eighty fully assessed members. Assessment for the allocation of a quality mark (bronze, silver or gold, with the possibility of also being awarded a rose for distinction) is based on seven criteria that include amenities, customer service, cultural aspects and business skills. Though there is scope for development, the network also offers a degree of business support/ skills development for owner-managers.

For more information: www.authenticbulgaria.org and
http://www.oecd.org/cfe/tourism/40239549.pdf

12.5. Age Friendly business recognition programme, Ireland

A Quality Model for improving both economic prosperity of retail and tourism businesses as well as improving the quality of service for older adults. The National Business Recognition Programme is aimed at local businesses in counties where the Age Friendly Cities & Counties programme is currently in operation.

Its aims are to:

- Recognise the efforts and improvements made by local business to provide more Age Friendly services and products
- Facilitate local businesses to further tap into an existing and growing market segment
- Share and collate online 'best practice' learned for wider dissemination

We envisage its implementation will ensure a lasting legacy of business lead initiatives that will improve the lives of older people. It's relatively easy to make your business age friendly. Most age friendly practices are low or zero cost and can mean a big difference in your bottom line. Simple changes such as making your business easier to find, enter, move around in and make purchases in are good for your customers and better for your business.

Businsses who advertise themselves as Age Friendly Business, are letting older people know that they value their custom and are committed to serving them. Businesses who join the Age Friendly Business community can learn how to attract and retain this powerful customer base.

For more information: http://agefriendlyireland.ie/resources/af-business/