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Extending tourism marketing: Implications for targeting the senior tourists' segment

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Abstract: *The continuous monitoring of market trends is one of the most important roles that marketing scientists and practitioners should fulfill. Tourism is significantly affected by major demographic, cultural and economic trends. In the last few years there is considerable debate on the radical demographic changes taking place around the globe and one of the main issues arousing in many developed and developing countries is this of ageing population.*

Keywords: Market segmentation, senior tourism market, ageing population, market targeting, destination marketing organisations.

JEL Classification: L83, M1, O1

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1. Introduction

Almost 20 years ago, Lago and Poffley (1993) had predicted that “...the time window present to 2010 is essentially the last opportunity for the hospitality industry to prepare for the onset of a truly aged society”. Later on, Caballero and Hart (1996) had noted that the crisis that mass tourism resorts faced could be partly attributed to “their manifest incapacity to respond to the new demands placed on them by this market-conscious, experienced, well-traveled tourist of the twenty-first century, who demands value for money and more than just mindless hedonism”.

Indisputably, the continuous monitoring of market trends is one of the most important roles that marketing scientists and practitioners should fulfill. As tourism is significantly affected by major demographic, cultural and economic trends, this responsibility becomes crucial for destination marketers and other tourism marketers. In the last decades, there is considerable debate on the radical demographic changes taking place around the globe with ageing population being one of the main issues arousing mostly in developed and at a lesser but important extent in developing countries. These changes have already created severe impact on the nature of tourism demand and are expected to shape the future of tourism offerings.

To show how important the lucrative over 50 years old market is for tourism marketing organizations, tourism experts estimate that, in terms of sheer numbers, the over 50's market exceeds the Chinese market (Source: Tourism Intelligence International). Glover and Prideaux (2009) go a step further and predict that the dominance of the baby boomer generation will continue to be a factor in the design and supply of tourism products and services for several decades.

Nowadays, it is therefore not surprising that the tourism industry has recognized the market potential of older people and tourism research has tended to focus on developing competitive business and marketing strategies to target these consumers (Sedgley et al., 2011). Destination Management Organizations (DMO's) have started to realize the great potential of the senior tourists' market and tailor their tourism products and marketing mix accordingly. In the same line, tourism intermediaries, such as tour operators and travel agencies, design and offer attractive and customized tourism packages for the “experienced and well-traveled” senior tourist.

This paper presents basic facts concerning the senior tourists' market and provides a review of the relevant program named “Europe Senior Tourism” of the Spanish government.

2. Ageing society and tourism: the facts

Forecasts estimate that the number of people over 60 years old will constitute 22% of the world's population by 2050 (Magnus, 2009). In many countries, the increase in life expectancy combined with the continuous fall in birth rates constitute the segments of senior consumers and tourists growing both as a percentage and absolute number. According to the "United Nations - DESA" (2009a, pp. 16-17) the median age is projected to increase by about 10 years over the next half century while the ageing index (i.e. ratio of people more than 60-year-old to children younger than 15) is projected to triple over the same period (2000-2050).

Moreover, in the more developed regions, the population aged 60 or over is growing at the fastest pace ever (at 2.0 per cent annually) and is expected to increase by 58 per cent over the next four decades, rising from 264 million in 2009 to 416 million in 2050; in the developing world the population aged 60 or over is projected to increase at rates far surpassing 3 per cent per year over the next two decades and the number of older persons is expected to rise from 473 million in 2009 to 1.6 billion in 2050 (Source: United Nations – DESA, 2009b).

The phenomenon appears more intensely in certain countries: Japan ranks first in terms of percentage of people over 60 years old (29.7%), followed by Italy (26.4%) and Germany (25.7%); overall, in 44 countries the relative percentage is above 17.8%, with USA and Russian federation being included in this group (U.N., DESA, 2009a). The issue of population aging is starting to emerge even in fast developing economies, such as China and Taiwan, since the average life expectancy has increased significantly (Jang and Wu, 2006).

According to a report of the Commission of European Communities (2009), demographic ageing is a major issue for the European Union and comes as result of two factors: a) significant economic, social and medical progress and b) a number of simultaneous demographic trends, such as the decline in fertility and the increase in life expectancy. It is interesting noting that between 1960 and 2006 there has been a rise of 8 years in the life expectancy of European citizens and between 2006 and 2050 it is expected to increase by a further 5 years.

Although the consequences of the above-mentioned facts have already started to become obvious, the impact is expected to be more severe in the mid and long term future.

2.1 Senior tourism market characteristics and market segmentation

Given that there is no consensus concerning which age group should be considered as senior travelers, the need for a common definition of the senior traveler seems apparent (Littrell et al, 2004). Most commonly, the lower boundaries to distinguish a senior person from a non-senior are 50 or 55 years of age (e.g. Shoemaker, 1989; 2000; Javalgi et al., 2002; Moschis et al., 1997; Muller and O' Cass, 2001; Kim et al, 2003). Another option is proposed by Whitford (1998) who used the phrase "maturing market" to include pre-seniors, i.e. those 50 to 64 and seniors, i.e. 65 and older.

According to another view, chronological age, despite its widespread use, has been shown to be a poor discriminator of older consumers and travellers, since age per se is not a very good criterion to use due to the great deal of variability in aging (Moschis et al., 1997). Factors such as the health status and the degree of social orientation seem to have a major social impact for mature consumers (Moschis and Mathur, 1993). Patterson (2006) also recognizes that while two people may share the same birth date, there are more important parameters shaping the behaviour of each individual, such as health, psychological well-being, socio-economic circumstances, social and family situation, gender etc.

Consequently, the term "subjective age" may seem more appropriate to depict and explain differences between consumers of the same biological age. According to Muller and O' Cass (2001), subjective age is "*an aspect of the self-concept that emphasizes how one feels, irrespective of one's chronological age*". Also, named as "self-perceived age" or "cognitive age", it seems to be a more robust segmentation and positioning criterion: the development and promotion of new tourism products for the older travellers require knowledge of their subjective ages (Muller and O' Cass, 2001). Findings from the retail industry also acknowledge the growing importance of the older segment and confirm the need to use "perceived age" rather than chronological age in determining marketing strategies becomes more intense (Myers and Lumbers, 2008). Subjective age can be a valuable tool also for designing successful tourism services and appropriate communication messages.

Tourism studies referring to the senior market are not a recent phenomenon; the first studies had already been published since the decades of 80's and 90's (e.g. Anderson and Langmeyer, 1982; Shoemaker, 1989; Goeldner, 1992; Lieux et al, 1994; Farana and Schmidt, 1999; Prayag, 2012). Despite the existence of early evidence that the seniors' market is not homogeneous (e.g. Shoemaker, 1989; Horneman et al., 2002), tourism marketers tended to treat senior consumers as a homogeneous segment. For example, the American senior traveler has been described as a sophisticated and experienced user of travel services, who views travel as an opportunity to escape from daily routines, to stimulate their senses, and as providing a chance for social interaction (Harsseel and Theobald, 1995; Alen et al., 2014).

Hudson (2010) also notes that the fragmentation and occasional contradictions of literature on marketing to seniors and particularly to baby boomers could be partly attributed to the heterogeneity of the market. Consequently, further research is necessary in order to understand and profile its different sub-segments. According to the view of Sedgley et al. (2011), older

people are a diverse group of complex individuals just like any other demographic category; though in their case the sizeable age range that tourism researchers tend to use when classifying someone as 'old' compounds this heterogeneity. Cleaver et al. (2000) suggest that tourism and hospitality marketers need to tailor offerings to each sub-segment of the senior market because different psychological needs, values, and concerns drive their consumer behavior in the tourism marketplace. In any case or definition width, the heterogeneity of the elderly market offers numerous opportunities for the marketer to profitably serve them (Visvabharathy and Rink, 1984).

The evolution and main trends followed in tourism segmentation studies have been noted in the segmentation of the mature tourism market as well. Following the traditional research stream in segmentation studies, initial attempts to segment the senior market were based on pure demographic criteria, such as age and family status (e.g. Javalgi et al., 1992; Callan and Bowman, 2006). Bone (1991) reviewed 33 segmentation methods for the mature market, a high percentage of which used income, discretionary income, and/or affluence level for distinguishing among segments. According to the same study, other important segmentation variables identified included health, activity levels, discretionary time and response to others.

Psychographic criteria have also been used for segmenting the senior tourist market (e.g. Lieux et al., 1994; Mathur et al., 1998; Backman et al., 1999; AbuKhalifeh & AlBattat, 2015). One of the earliest market segmentation studies was conducted by Shoemaker (1989), who used travel benefits to segment elderly Pennsylvanians and identified three submarkets. A subsequent study of the author (2000) produced confirming results concerning these three clusters. Other studies put emphasis on travel motivation, as it represents a crucial parameter in explaining travel preferences and behavior. Hagan and Uysal's study (1991) identified as influential motivators of the U.S. seniors the opportunities for socialization, exposure to novel situations and escape from stressful daily life. Boksberger and Laesser (2009) segmented Swiss senior travelers on the same basis and proposed the existence of three clusters, two of which partially represent a life cycle concept. Cleaver et al. (1999) tried to discover how underlying travel motives and values could identify distinct senior tourism market segments and resulted in seven travel-motive segments.

Studies covering the motives of senior tourists are in most cases based in national scale samples. For instance, Hsu et al (2007) proposed a model of tourism motivations for Chinese seniors that consisted of two main components: a) external conditions, e.g. societal progress, time, health and personal finance and b) internal desires, e.g. improving well-being, escaping routines, socializing and personal reward. Jang and Wu (2006) recognized 'knowledge-seeking' and 'cleanliness and safety' respectively as the most important push and pull motivations of Taiwanese seniors while "novelty seeking" proved to be a major travel motivation factor for them (Jang et al, 2009). Sangpikul (2008) identified three push factors (novelty and knowledge seeking, rest and relaxation and ego-enhancement) and four pull factors (cultural and historical attractions, travel arrangements and facilities, shopping and leisure activities and safety and cleanliness) in the motives of Japanese seniors. Fleischer and Pizam (2002) focused on the tourism constraints of Israeli seniors, proposing that they mainly derive from income and health restrictions.

The tourism activities have also been used as an important criterion for segmenting the mature market (e.g. You and O'Leary, 2000; Nimrod and Rotem, 2010). Sellick (2004; Kim et al., 2015) used the concept of activities-age, a measure of cognitive age related to the age a person identifies with while enjoying travel activities, to discriminate between travel-motive segments of the Australian senior market. Moreover, tourism activities in relation to the shopping behavior of U.S. senior travelers have been studied by Littrell et al. (2004). Lehto et al. (2001) used travel preferences to segment the market of French older tourists, resulting in three sub-segments.

Some other segmentation criteria have been combined. Horneman et al. (2002) profiled Australian senior travelers according to a combination of demographic and psychographic characteristics and proposed the existence of six segments, differing in terms of holiday attractions, travel motivations, and information sources used when planning and choosing a holiday. Other authors have studied senior tourism in relation to parameters such as the housing type and distance (Reece, 2004) and quality of life (Dann, 2001). Such studies provide useful information and insights for tourism marketers.

2.2 Implications and challenges for tourism marketing

Nowadays it is considered a fact that population ageing is expected to have several marketing implications for all industries. One of them is that the characteristics of older generations are likely to become more predominant and consequently consumption patterns are affected dramatically. Many authors have predicted that a new era was going to begin from 1996 and onwards, when the first baby boomers would turn 50 years old (Moschis et al, 1997; Leventhal, 1997; Hudson, 2010; Chen and Shoemaker, 2014). This new era was expected to constitute one of the greatest marketing movements that would last over 30 years and that would have major influences on business strategies. In this vein, Glover and Prideaux (2009) note that *"...as the baby boomers retire, their demand patterns and preferences will grow in significance and will strongly influence the future structure of tourism product development"*.

As older consumers may differ substantially from other market segments, these differences are expected to be transformed to well specified marketing implications: older consumers may differ in their product needs, media habits and even in the way they process information (Visvabharathy and Rink, 1984). For instance, there is evidence that as baby boomers grow older,

they demand the same type of products as before, but the product features need to be adapted to their new position in the life cycle, new family situation and older age (Glover and Prideaux, 2009).

The market segment of senior or older tourists can be easily considered as an ideal target for tourism marketers, not only because of its current size and purchasing power, but also because of demographic and social forecasts that it will continue to grow in numbers (e.g. Schröder and Widmann, 2007; Gabor, 2015). Additionally, the senior market is a promising target due to the time flexibility of seniors after retirement (Jang and Wu, 2006). The latter characteristic has an important marketing implication: the mature travel market can constitute a market able to attenuate seasonal imbalances of tourist destinations (Neves, 2008).

Quite apart from the quantitative characteristics of senior travelers, additional qualitative parameters should be carefully considered. Today's seniors diversify in nature from previous generations of seniors. On average, they are more affluent and better educated; they have richer life experiences and perhaps less health problems (Zimmer et al, 1995). They are also likely to be more active and independent and have more interests and travel experiences compared to older people in the past. It has also been proposed that they place tourism high in their priorities (e.g. Statts and Pierfelice, 2003; Le Serre and Chevalier, 2012) and that they have a relatively large share of discretionary money which they are willing to spend on travel (Patterson, 2007).

All these factors should be considered for the design of appealing tourism products and respective communications, pricing and distribution strategies. Until recently and despite the important academic interest in the older consumer segments mainly in the U.S.A., older consumers had been largely neglected or ignored by the marketing community, which mostly concentrated on younger markets (Swayne and Greco, 1987; Long, 1998; Carrigan and Szmigin, 1999; Szmigin and Carrigan, 2001; Zafiroopoulos et al., 2015). Most of the ageing research is US-based; America is considered to have responded quickly to ageing consumers while European business and academics have followed at a slower pace (Thompson and Thompson, 2009).

But this is beginning to change and more studies concerning senior consumers and tourists come to light. Hudson (2010) puts emphasis on the marketing perspective by exploring consumer trends and appropriate marketing communication tools for mature travelers; he finds that travelers of the baby boomer generation are looking for authenticity, spiritual and mental enlightenment, nostalgia, convenience and spontaneity, all packaged in a safe, customized, healthy, green wrapping and delivered with great customer service. The author suggests that in order to connect with them, marketers should emphasize youth, use nostalgia, show how to improve boomers' lives, provide detailed information, promote the experience, and use a variety of media. Moreover, if we accept that in the aging consumer marketplace word of mouth appears to be the primary advertising medium (Leventhal, 1997), it is easy to imagine how valid this should be in the case of travel and tourism services. Indeed, word-of-mouth communication seems to be the key element in influencing elderly people's decisions about their preferred holiday destinations (Fall and Knutson, 2001; Patterson, 2007).

3. Responding to senior tourism markets

3.1 Destination marketing organisations' practices and approaches

In our days, leading FMCG companies, such as Procter & Gamble, L'Oreal and Unilever, plan and implement proactive strategies based on market trends by launching products and campaigns that address to the mature and -on average- more affluent segments of the market. In parallel, several advertising companies are currently beginning to use older models in their tourism and travel advertisements (Patterson, 2007). Certain DMO's and tourism intermediaries also seem to realize the challenge and seize the opportunity to attract senior tourists, by offering special tourism packages. An integrated marketing mix is implemented in this attempt, with customized services to meet the needs of ageing consumers, special positioning, promotional and advertising strategies, appropriate pricing and distribution strategies.

Hongsranagon (2006) studied the potential of Thailand to target Japanese mature tourists, concluding that Japanese seniors constitute a valuable niche target market. Neves (2008) studied the attractiveness of Portugal as a tourist destination by mature travelers and proposed that the study of the attractiveness of a destination should be backed up by models that include, among other aspects, customization criteria for a better understanding of the consumption habits of the modern mature traveler. Shopping destinations have also been suggested to be extremely attractive for the mature market (Littrel et al., 2004; Bai et al., 2001).

There are many tourism intermediaries taking an active role to meet the needs of this segment. For example, ElderTreks (www.eldertreks.com) is a travel company established in 1987 and designed exclusively for tourists over 50 years old who seek adventure travel experiences. Another example of an active travel agency targeting the senior market is "Kavaliero Viajes" (www.kavaliero-viajes.com) which offers tailored made tourism packages for travelers over 55 years old to many attractive European destinations, such as Greece, Cyprus, Spain, Portugal and the U.K.

It seems that destination marketing organizations insist on primarily focusing on broad geographic targets or specific tourism products (e.g. wine tourism, ecotourism, medical tourism, golf tourism, wellness tourism) rather than designing and implementing marketing strategies tailored to the needs of senior tourists. An examination of recent destination marketing

plans available at the web confirms the above view. There are few DMO's that clearly state their intention to target seniors as a distinct segment and prepare a well-planned marketing mix to achieve this goal. Spain is one of the destinations blazing trails in the field. Though, in this case the benefits of DMO's and tourism destinations extend beyond the obvious revenue increase: the opportunity to prolong the tourism period, tackle seasonality issues, increase employment and better handle yield management are major motives to pay attention to the senior market.

The year 2009 was an important milestone for tourism in Europe: the "Calypso" Preparatory Action Plan was approved by the European Parliament with an objective to promote the development of social tourism initiatives amongst the member states of the EU. This initiative of the European Commission is named "Calypso" after the Greek sea nymph who for seven years played host to the war-weary Odysseus on her island. "Calypso" aims at promoting tourism in the low season, combating seasonality whilst having a social benefit and simultaneously enhancing the European citizenship by providing tangible opportunities to improve mobility, self-fulfillment, socializing and active learning for seniors.

The Calypso preparatory action seeks to support specifically 4 target groups, one of which with high potential are the citizens over 65 years of age or pensioners. Until 2010, 21 EU and candidate countries have signed up and six workshops have been held across Europe to study good practices and build a common strategy. Moreover, an expert group composed of public and private sector stakeholders has been set up to assist the European Commission with Calypso's implementation.

One of the "Calypso" projects that was awarded by the European Commission is the "SOWELL" project (Social tourism Opportunities in WELlness and Leisure activities), which was coordinated by Région Midi-Pyrénées, France. As mentioned in the project proposal, the SOWELL project aims at fostering the development of sustainable social tourism during low season periods in the sector of wellness and leisure-spa activities for seniors and young people. As spa tourism mostly addresses a national audience who is already used to taking part to this activity, the SOWELL project seeks to extend wellness practices to a European public as well as to categories of the population who do not generally have access to this type of tourism either because of lack of information, suitable offers or financial resources.

3.2 A best-practice case: The Spanish "Senior Travel 55+" initiative

The Europe Senior Tourism (EST) program is an all-inclusive program offering European citizens over the age of 55 the chance to spend their holidays in Spain during the off-peak tourist season, i.e. autumn, winter and spring. The Spanish government and the governments of the regions of Andalusia, the Balearic Islands, and the Region of Valencia subsidized part of the cost and thus, the program is offered at discounted prices. The proposed destinations include Ibiza, Majorca, Costa del Sol and Costa de la Luz. With the use of press ads, promotion through authorized tourism agencies in each of the target countries and the aid of social networks and with the promise of "active holidays", these Spanish destinations have already attracted an important number of senior tourists, mainly from Greece, Italy and Poland. The EST program constitutes a useful and effective tool to handle seasonality, reinvigorate economic activity and prolong the tourism period, critical issues for most Mediterranean destinations.

Segittur (Spain's State-run Company for the Management of Innovation and Tourism Technologies) has chosen to use social networks as the most personal and innovative way to bring the EST project to the attention of potential customers. The campaign was therefore focused on Facebook and Twitter, and its primary aim was to attract European tourists over the age of 55 to Spain during the winter season. Another of the goals pursued by the program is to tackle one of the serious problems experienced by the tourism industry: its seasonal nature.

In terms of outcomes, the EST pilot program increased the number of tourists from markets which were new for Spain in winter. The second edition of the EST program took place afterwards offering the chance to European senior citizens to commonly share experiences with other seniors in an environment designed for "active aging". The only requirements are to be over 55 years old and be a resident in the following European countries: Slovakia, Holland, Belgium, Poland, Italy, Austria, Greece, Portugal, Denmark, France, Czech Republic, Rumania, Bulgaria and Ireland. Younger travelers may also access this special package, as long as they are escorted by at least one senior who meets the two above mentioned requirements. Future editions of the EST program will seek the integration and participation of the remaining countries that make up the European Union (www.visiteurope.com).

4. Conclusions

Changes in the characteristics of tourism demand can create clear market advantages for the destinations that are willing to adapt their offerings to the tourism needs of each generation group. The potential of the seniors' market for stable or even increasing growth is a very promising element (Horneman et al., 2002) and as Green (2005) estimates, tourism businesses targeting ageing population with an effective marketing strategy are going to be monetarily rewarded.

First of all, to cater to the diversity of needs of the seniors' market, a more comprehensive understanding of travel behavior is necessary in order for tourism products and services to be tailored to match preferences for travel and gain market advantages (Horneman et al., 2002; State and Nedelea, 2008). Market research and continuous monitoring of the trends in the seniors' market can provide a solid basis for market success. Secondly, the senior market should be regarded as a distinct target group for tourism marketers, who should prepare and execute customized marketing plans for seniors. According to our view, more emphasis should be put by DMO's to this segment. Strategic marketing planning can be a valuable tool for tourism stakeholders to prioritize this truly promising market.

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