Silver Cyclists: Product Development for Seniors

Co-funded by the COSME programme of the European Union
Who are 'Silver Cyclists'?

Giving up old activities or taking up new (old) activities
Three questions

• How well received were the Silver Cyclist packages?

• What do Silver Cyclists want/need?

• Is this different from other cycle tourists?
Our approach

Review of the cycle tourism market

• Supply side:
  - analysis of websites
  - interviews with cycle tour operators

• Demand side:
  - survey of cycle tourists
  - interviews with cycle tourists
Analysis of websites

• 50 operator websites from Europe and US analysed for content, imagery, marketing and reference to silver cyclists

• No explicit reference to older age groups – instead phrases such as ‘holidays for all ages’.

• Operators differed in terms of:
  – Number and variety of destinations offered
  – Level of service and support
  – Variety and specialisation – e.g. some focused on more challenging holidays, others talked about relaxing, gentle tours
Imagery

Images show a mix of seriousness and ages
Interviews with tour operators

• From Denmark, Germany, Spain and the UK
• Different business models, including:
  - independent bike rental businesses
  - specialist cycle holiday business
  - regional tourism organisation
  - hotel owner
• Some focus on domestic market, others international (mainly German, British, Dutch and Scandinavian)
• Evident that love of cycling/wanting to live in area important motivation for many providers
Perceptions of tour operators

• Suitable infrastructure really important, especially traffic-free routes
• Type of infrastructure determines types of holidays provided (linear, circuits, days out, etc)
• Older market welcomed: generally pleasant customers, reasonably high spend, often longer in area and repeat visitors
• Luggage transfer important, not only attracts more customers, but allows them to ‘become ordinary’ tourists when they arrive at accommodation
• Directly targeting older customers not advised, just providing the product they appreciate will attract them (traffic-free, luggage transfer, information about route, relatively short stages, sometimes e-bikes)
Survey questionnaire

• Two online surveys are currently in operation
  – Survey ‘A’ for those who have cycled on holiday (Danish, English, German, Italian, and Spanish)
  – Survey ‘B’ for those in the third-age that haven't (English and Spanish)

• What follows are the interim results from Survey A only and respond to 2nd and 3rd questions

• Analysis will be complete on both surveys by the end of November and will be available on the Silver Cyclists website: silvercyclists.eu
Who has responded?

- 50/50 between the third-age group and the others
- More gents than ladies, especially in the 'other' group
- Third-age more likely to have been on a cycling holiday before
- 56% of both groups class themselves as "an experienced, regular cyclist". A further 30% of the third-age group class themselves as "an experienced, occasional cyclist", whereas 20% of the others class themselves as "an occasional cyclist"
- The third-age group are more likely to be working part-time or retired
Key findings

Which of the following influenced your decision to book this holiday?

Luggage transfer - Electric bikes - Groups - Guided - Self-guided - Own bike - Breakdown service - Hire bikes - Off road - Good accommodation - Sightseeing - Single rates
Key findings cont.

How important were the following when you chose this holiday?

<table>
<thead>
<tr>
<th></th>
<th>Other</th>
<th>Third-age</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature/Landscape</td>
<td>Very important/Important</td>
<td>Very important/Important</td>
</tr>
<tr>
<td>Fitness/Health</td>
<td>Fairly important/Important</td>
<td>Very important/Important</td>
</tr>
<tr>
<td>Joy/Pleasure in cycling</td>
<td>Very important/Important</td>
<td>Very important</td>
</tr>
<tr>
<td>Relaxation/Leisure</td>
<td>Very important/Important</td>
<td>Very important/Important</td>
</tr>
<tr>
<td>Time with friends or relatives</td>
<td>Very important/Important</td>
<td>Very important/Important</td>
</tr>
<tr>
<td>Culture/Visiting attractions</td>
<td>Very important/Important</td>
<td>Very important/Important</td>
</tr>
</tbody>
</table>
Other bits

• Majority of both groups have been on a cycling or walking holiday in the last five years

• If the holiday was not available
  - 70% would have gone elsewhere (still cycling)
  - 23% of 3rd age would have booked at another time
  - 17% of the others would not have taken a holiday
Interviews with cycle tourists

• Interviews with people who have recently been on a cycling holiday
• In terms of packaging holidays, interviewees generally:
  – Liked to do their own research and planning
  – Favoured more cycle friendly areas including infrastructure, motorist culture and being able to easily move bikes on trains
  – Would hire bikes rather than take their own if cost suited them
Interviews with cycle tourists

• Depending on circumstances (experiences sought and sometimes companions) sometimes people chose their destination primarily to go cycling, others would choose the destination and then cycle whilst there:
  — ‘It (...) depends on who I’m going with. If I go with my wife....it’s more...having something else around the area. She does a bit of cycling, but it’s having more warm weather, beaches and things like that. Whereas, if I go with friends...it’s the big mountains. (...) What I want to do is pick the area that I want to go cycling in first, and then book the area [whereas with my wife] I pick the area we want to go on holiday to, and then go cycling’
Interviews with cycle tourists

- Peoples wants and needs differ on cycling holidays
  - Some are infrequent cyclists who want to combine cycling with other activities
  - Others are looking for challenges.
  - Some people use the holiday to cycle more than they would normally

‘I’m a commuter cyclist. I enjoy cycling. I’ve not been on any long tours (...) I went round the Isle of Wight, I’ve done the canal from Bristol back to Reading, I took my bike to the Danube and did a few days along the Danube bike path last year, so I don’t know whether I would call myself a cycle tourist as such.’

‘We were looking to do some longer distances, challenge ourselves distance-wise. There’s hills there if you want them. (...) so it was building up fitness, challenging ourselves’
Conclusions

• Third-age cyclists are not so different from others - flexibility is the key
• They are already out there
• More experienced cyclists
• Cycling is a great way to experience a destination
• Longer trips, but shorter distances
• More likely to mix-and-match
Experiencing different cultures, cuisine, meeting people from that country, being able to navigate our way, the wonderful hotels that Eurobike had booked for us, socialising with friends and family.