



## A STUDY OF TRAVEL MOTIVATIONS OF SENIORS TOURISTS

## Tourism

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## ABSTRACT

Over the past decades, leisure travel has become increasingly popular in older segments of the world population, as a consequence of global factors such as a rise in life expectancy, improved health conditions, a higher disposable income, and increased availability of discretionary time in retirement age. Consequently, researchers have become more interested in studying the motivations for travel of seniors. A number of questions may be raised or have been addressed in the recent past: What are the main factors explaining the travelling choices of seniors? Are their travel motivations different from the ones of the younger population, which have been widely studied in the past? Are geographical differences in terms of motivations comparable between different age groups? Why is senior tourism a topic of particular interest with regard to Asia? In order to answer such questions, in this paper, we provide a review of the literature on the travel motivations of seniors. On the basis of articles published between 1988 and 2015 on the topic, we provide a qualitative and meta-analytic assessment of past findings, by investigating the dimensions of travel motivations most frequently employed in past seniors surveys. Finally, we discuss a research agenda for further analysis of senior travel motivations and for the integration of this branch of travel research within the wider framework of senior tourism analysis and management.

## KEYWORDS

Travel Motivations; Seniors; Literature Review.

## 1. INTRODUCTION

Over the past decades, leisure travel has become increasingly popular in older segments of the world population, as a consequence of global factors such as a rise in life expectancy, improved health conditions, a higher disposable income, and increased availability of time in retirement age due to changes in family structure (e.g., the increase in empty-nesters). Consequently, age aspects of tourism have received a great deal of attention in social science research. Early studies – especially on senior tourism and on travel life-cycle – can be found, amongst others, in Lawson (1991), Blazey (1992), Oppermann (1995), Zimmer *et al* (1995), Hong *et al* (1999) and Faranda and Schmidt (2000). The effects of age on tourism behaviour has increasingly become a focal point of research in the past decade, now that the signs of an ageing society become more visible. Examples of recent studies on the tourist pattern of seniors can be found in Reece (2004), Moschis and Ünal (2008), Nimrod (2008), Nyaupane *et al* (2008) and Boksberger and Laesser (2009). It turns out that market segmentation – across age groups and thus in relation to the life cycle of tourists – is an important handle for understanding differences in tourist behaviour. Understandably, because of the rising relevance of the senior tourism market segment, more researchers have grown interested in studying the motivations for travel of senior citizens, so to understand how to shape adequate policies, both in private and public contexts. It is not surprising that most of such studies focus on marketing issues or are published in marketing-oriented journals: the relevance of a growing segment of travel demand poses operative and long-term planning questions related to supply strategies in travel and tourism, for both private and public stakeholders. In particular, knowledge of senior tourists' motivations may facilitate the choices of destination managers and tour operators in terms of horizontal differentiation or simply in terms of the variety of the touristic product. Senior tourists form a specific market segment, with more emphasis on quiet, culture, environment, climate, quality of life and accessibility (including walking and public transport facilities).

While travel motivations have been widely analysed for the general population (see, e.g., Cha *et al*, 1995; Hanqin & Lam, 1999; Jang & Cai, 2002), contributions which focus on seniors are much more limited (for a recent review, see Patterson, 2006). Studies are available in which, among other factors, age was found to mitigate financial constraints to travel (Alegre *et al*, 2010), or where mature age has been shown to affect the willingness to travel negatively and tourism expenditure positively (Bermiñi & Cracolici, 2015). Still, senior travel motivations, in particular, have been largely neglected in the past. Nonetheless, a number of questions have been – and may still be – raised in this regard, such as: What are the main factors explaining the travelling choices of seniors? Do their travel motivations depend on the definition of 'senior'? An intriguing question is also: why is senior

tourism a topic of particular interest with regard to Asia? The latter question does not only stem from many Asian studies on senior tourism, but also from the fact that cruise tourism in Asia is a rapidly growing market segment for seniors (see, e.g., Chen *et al*, 2015).

To address various above-mentioned questions, we review in this paper the literature on the travel motivations of seniors. Our objective is to shed light on the recurring characteristics and findings of studies in this particular literature, in order to uncover possible factors explaining the heterogeneity in the obtained results. It is customary, when investigating senior travel motivations empirically, to develop and administer a survey, and to subsequently analyse the collected information by means of multivariate analysis (data reduction) techniques like factor analysis or cluster analysis, in order to obtain synthetic travel motivation dimensions, or to categorize the respondents into internally homogeneous groups. We review all available past studies that have provided such analyses. In particular, we first provide a qualitative systematic assessment of the findings of 29 studies published between 1988 and 2015 on the basis of their characteristics, by discussing the dimensions of travel motivations most frequently found and highlighting the main critical points in the literature. We define and focus on, five main dimensions: culture and nature; experience and adventure; relax, well-being and escape; self-esteem and ego-enhancement; socialization. On the basis of the above points, we provide a preliminary meta-analysis and discuss statistical evidence on how the study characteristics drive their results. We conclude by pointing to the dimensions in which further efforts are needed, and to how this strain of research can be integrated into a wider theoretical and applied research framework concerning senior tourism and its related policies.

## 2. Characterizing the Senior Travel Motivations Literature

## 2.1. Classification of Studies

Through systematic search procedures and 'snow-balling' processes, we have been able to identify 29 studies in which the travel motivations of senior tourists have been investigated from an applied perspective, and making use of factor analysis or principal components analysis. In our systematic typological comparison, we review these 29 studies on the travel motivations of seniors. In particular, we focus on studies providing factor-analytical results in order to identify the seniors' main travelling drivers. More studies exist employing cluster analysis, and therefore providing a different perspective. They are not considered, in our paper, since they cannot be matched with the ones using factor analysis. The typical study analysed here is structured as follows: (i) in most cases, a specific aspect of interest or approach pertaining to travel motivations is identified and discussed (such as gender issues, quality of life, or tourism via specific transportation means); (ii) a questionnaire is developed as the basis for empirical evidence; (iii) the

questionnaire is administered to a group of seniors, either during a trip (e.g., in You & O'Leary, 2000) or at senior facilities (e.g., in Le Serre *et al*, 2013). As it may be expected, due to obvious differences in the questionnaires employed, the studies analysed to provide a multitude of identified factors, which are given subjective interpretation and naming by the respective authors.

The applied scientific literature provides a rich array of attempts to classify the travel motivations of seniors. Several years back already, Guinn (1980) provided a five-class taxonomy, with the main motivation drivers being: rest and relaxation, family and friends, physical exercise, learning experience, self-fulfilment and accomplishment. Later contributions provided similar classifications; for example, Snepenger *et al* (2006) found four core motivations (personal seeking, personal escape, interpersonal seeking, and intrapersonal escape). Traveller segmentation (by means of cluster analysis techniques) was also employed in multiple studies (see, e.g., Wang *et al*, 2008; Ward, 2014). Le Serre *et al* (2013) recently pointed out how research on senior travel motivations in Western countries generated similar results in a number of separate studies (while suggesting that differences with Asian – Chinese to be precise – motivations could exist).

A major distinction that should generally be made for travel motivation studies is the one between push and pull motivations. Push motivations pertain to the individual's needs and desires. As such, they are internal (or intrinsic) drivers, 'yielding the satisfaction of emotion- dominant values' (Carneiro *et al*, 2013). They are intangible, 'general and non-destination- specific attributes' (Le Serre *et al*, 2013). As such, they represent the 'true' travel motivations based on individual needs and are the dimension of motivations on which most of the literature has focused over the years. On the other hand, much fewer studies have focused on pull motivations, most typically when a specific interest in supply characteristics of destination risk factors or travel impediments are of interest. Indeed, pull factors are external, cognition-related attributes, which could be tangible or not, and are perceived by the potential tourist as existing at the destination. On the basis of the above discussion, we choose to focus, for comparative reasons, on push motivations only, discarding 'pull' factor-analytical results, which are provided in 8 of the 29 studies considered in a meta-analytical comparison.

The studies analysed in this paper have been published over a period of about 25 years, going from 1988 (Hawes, 1988) to 2014 (Chen & Shoemaker, 2014; Ward, 2014), to still forthcoming ones (Woo *et al*, 2015). Seniors of various nationalities (USA, Europe, Asia and Australia) have been interviewed in the studies, either while travelling or on the basis of preliminary questions on their travelling experience, or, as in several cases, without any screening procedure rather than the sole age.

## 2.2.DEFINITION OF SENIOR

Connected to the above issue is the actual definition of 'senior'. The studies surveyed here employ various age thresholds for selecting their sample of seniors. In 12 out of 29 studies, a minimum age of 50 (the lowest in the literature considered) is used, which provides a rather broad definition of 'senior', which is far from being consistent with the idea of retired individuals enjoying tourism in their newly gained free time. The samples of a considerable number of studies are therefore heterogeneous in the characteristics of the interviewees, mixing those who could alternatively be defined as mid-age individuals/workers with individuals who are retired or close to retirement. For instance, Chen and Wu (2009) use a sample of 50+-year-olds, which includes about 50 per cent of retired individuals, while in Sangpikul (2008a) retirees account for about 39 per cent of the sample. In Bai *et al* (2001), factor-analytical results are compared for three samples (from Japan, UK and Germany), which contain rather different shares of retirees, amounting to 23, 54 and 43 per cent, respectively. Only three studies (Jang *et al*, 2009; Carneiro *et al*, 2013; Woo *et al*, 2015) employ only individuals aged at least 63 or 65, which can be thought to be relatively homogeneous internally. In particular, Woo *et al* (2015) interview only retired seniors. Additional exceptions are Nimrod and Rotem (2010), who, despite interviewing seniors aged 50 or more, have a sample made up entirely of retirees. The samples of two more studies (Clever *et al*, 1999; Wang *et al*, 2008) include mostly retirees.

On the other hand, some authors actually focus on the age factor while analysing travel motivations of seniors. Clever Sellick (2004) focuses on cognitive age, while Sangpikul (2008a) shows that the share of

retirees included in the two clusters resulting from an analysis of US travellers to Thailand is different (43% vs 24%) and that, more generally, occupations significantly differ between the two clusters. Hawes (1988) carries out a factor analysis for his entire sample as well as by age group (50–54, 55–59, 60–64, 65–69, 70+), but unfortunately reports incomplete results in the latter case and does not interpret the emerging factors. Similarly, Norman *et al* (2001) focus on the differences between neo-mature (aged 50–65) and veteran-mature (aged 65+) respondents, but only provide factor-analytical results for the pooled sample, analysing their findings ex-post on the basis of various subsamples. They find that age alone is not enough to identify homogeneous senior tourist clusters. Finally, Chen and Shoemaker (2014) focus on analysing whether travel motivations within the same cohort but at different life cycles (i.e., different ages) significantly differ. They find that a hypothesis of invariant travel motivations cannot be rejected, while the opposite result is found with regard to perceived barriers to travel.

Overall, the literature on senior travel motivations does not appear to explicitly consider, aside from the few cases documented above, problems related to a precise or uniform definition of 'senior', and in particular to his/her working status (active vs inactive). The brief review by Sie *et al* (2015), in which aspects related to cognitive age and inter-cohort differences are discussed, represents one of the few exceptions in this regard.

## 3.Senior Tourism: A Panorama

The world population is showing signs of an unprecedented change. First, the next decades will be a period of drastic population increase on a worldwide level, to the extent that by the year 2050 the total world population may amount to more than 9 billion people (see Lutz *et al*, 2014). Next, the population rise shows a highly skewed distribution, with a rapid increase in Asia, Africa and Latin America, and a stable (or even declining) population volume in Europe, North America and some Asian countries (e.g., Japan and China). And finally, the structural ageing process means worldwide that the senior cohorts in all demographic profiles will rapidly increase.

In many countries, this ageing population will not be a poor or impoverished part of the population, but a 'healthy and wealthy' cohort. Against this background, senior tourism may be expected to assume a prominent position in domestic and international tourism. In general, tourism is an economic sector that is on a rising edge, but with more seniors, it seems plausible that tourism is becoming an even more important economic sector in the future.

It goes without saying that the new cohort of 'senior tourists' prompts important research and policy challenges. On the empirical side, it is clear that the current ambiguity on 'seniors' has to be clarified; are we talking about 50+ years old tourists, 'mature' tourists, retired tourists (with different retirement ages in different countries)? Furthermore, it would be important to know the gender balance and the educational profile of senior tourists. This also implies that the system of tourism satellite accounts (TSA) needs urgently an update towards the needs of the emerging senior tourist markets.

It is obvious that the rising importance of the tourism sector – as a major export industry in many countries – calls for an improvement in empirical data on volumes of international tourism, origin-destination patterns, gender, age, education, and so on. Clearly, in order to develop informed policies, the motivations of senior tourists would need more empirical investigation as well, based on systematically and consistently composed and administered survey data, especially from a multi-country perspective. Our meta-analytical results show that some factors such as temporal trends or the nationality of the seniors, lead to different travel preferences, suggesting that these differences should be acknowledged and carefully taken into consideration. Parameters to be addressed in particular are: distance travelled, healthcare facilities and cultural amenities.

It has also been argued that the world population will increasingly be a mobile population, with a rise in temporary and structural international migration (see Lutz *et al*, 2014). One of the consequences of the 'age of migration' is also a rapid rise in international tourism (see, e.g., Gheasi, 2015). The causal mechanisms involved with the tourism-migration nexus call for solid applied research on the interwoven linkages between cross-border tourism and foreign migration.

Finally, it has become clear from our comparative analysis that senior

tourists are by no means standard tourists. They have specific preferences and motivations codetermined by their age (and related attributes), such as the 'pensionado tourism' in climatologically favourable places (see Ridderstaat, 2015). A logical policy consequence of such diversity is to call for targeted investments, in tourism destinations, based on data collection and in-depth analysis of senior motivations and constraints, for example in terms of health care, cultural facilities, accessible amenities, or walking facilities. It seems plausible that the next decades will show a remarkable rise in the importance of senior tourism, especially in the light of their spending capacity. Long-term seasonal senior tourism is on a rising edge so that the need for destination competitiveness prompts the supply of client-oriented facilities for senior tourists.

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