

TOWARDS A DEEPER UNDERSTANDING OF SENIOR TOURISTS: CHALLENGES AND OPPORTUNITIES OF AN EMERGING MARKET SEGMENT

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Abstract:

The world's population is ageing with virtually every country in the world experiencing growth in the number and proportion of older people in the population (United Nations, 2015). The number of over 60s has risen by a third over the last decade, making this the fastest growing consumer segment (Euromonitor, 2017). This fast growth of the ageing population is set to become a major lead market for many and various sectors and makes this group a segment not to be overlooked. The market for senior tourists already represents a key economic segment. It has drawn increasing attention from researchers in the past decade (Patterson, 2006), with a growing recognition that they place travel and tourism high on the list of their priorities when they retire (Statts and Pierfelice, 2003; Balderas-Cejudo et al., 2016). Nevertheless, the travel industry has been criticized for failing to recognize the diversity of travel preferences required to attract, connect and market to seniors. This article provides an analysis of the literature on the socio-demographics of seniors, discusses different trends and shifts in their leisure behaviour, and draws implications for the tourism and hospitality industry. The literature presented in this review was identified through multiple sources including the use of a range of tourism databases and tracking citations from the research literature.

This paper aims to review these issues within the tourism and population ageing literature to ascertain (1) shifting trends in silver travelers and (2) how tourism providers need to respond to seniors changing needs and wants.

Keywords:

Seniors, tourism, hospitality, ageing, market segment.

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1. Introduction

Population ageing—the increasing share of older persons in the population—is poised to become one of the most significant social transformations of the twenty-first century, with implications for nearly all sectors of society (UN, 2015). Predictions from the United Nations indicate that by 2050, every fifth person on Earth (about two billion people) will be older than 60 years, a doubling of the 2013 figure (United Nations, 2013). The number of over 60s has risen by a third over the last decade, making this the fastest growing consumer segment (Euromonitor, 2017).

Never before has humanity seen such a development, i.e., a shrinking of the younger populations in almost all of the developed countries while at the same time a considerable ageing of its older residents (Meiners and Seeberger, 2010). The boundaries of old age continue to shift as we live longer and take better care of our health and wellbeing.

Rapid demographic ageing is not only a major societal challenge (in terms of public budgets, workforce, competitiveness and quality of life) but also a major opportunity for new jobs and growth, also referred to as the Silver Economy (European Commission, 2015). Following Richards (2003), tourism is one of the quintessential experience industries that Pine and Gilmore (1999) argue will come to dominate the economy in future. As a direct consequence of global ageing patterns, older travellers have become a significant proportion of annual total holiday spending (Sie et al., 2015). Seniors are increasingly being recognised as a significant group of tourists by both the private sector and academic researchers (Prideaux; Wei and Ruys, 2001).

This is partly due to a sizeable increase over the last decade in the number of older travellers, coupled with the expectation of even greater growth in the future (Boksberger and Laesser, 2009; Chen and Wu, 2009; Meiners and Seeberger, 2010; Sie et al., 2015). In recent years, both practitioners and researchers have acknowledged the importance of older adults as a significant market segment of the tourism industry (Paxson, 2009).

Hence, seniors represent one of the most important market segments in tourism (Patterson, 2012) and it interests the tourism industry because of its growing size and increasing participation in travel activities (Huber et al., 2018).

Tourism by seniors is substantial, such that people older than 60 years will likely have made more than 2 billion international trips by 2050 (United Nations, 2010), far more than the 593 million trips made in the early 2000s (Patterson, 2006).

Following conclusions on the European Summit on Innovation for Active and Healthy Ageing Final Report (2015), demographic change drives the emergence of a large and growing segment of the population / consumer market (the so-called "overlooked demographic") whose needs remain largely un-met. However, this market segment has been perceived in the tourism industry as relatively unattractive (Alen et al., 2017; Cleaver, Muller, Ruys, & Wei, 1999; González et al. 2009; Moschis, 1992; Szmigin and Carrigan 2001). Travel industry regards senior consumers as one large homogeneous market, which has been attributed to an inaccurate view of 'the elderly' (Cleaver, et al. 1999; Esiyok et al., 2018; Moschis, Lee, and Mathur, 1997; Neugarten, 1968; Pennigton-Gray & Lane, 2001; Szmigin & Carrigan, 2001) failing to recognize the changing needs and the diversity of travel preferences that are required to attract the senior travel market. As the result of poorly developed and marketed products this has created a cycle of disinterest on the part of many older people towards many services and products (Szmigin and Carrigan, 2001). Many travel businesses, marketers and different stakeholders are operating without deeply understanding the preferences, expectations and needs of senior travellers, with stereotypes visions on their behaviour when travelling for leisure.

In an era of fast-changing consumer profiles and behaviours, companies must strive for a thorough understanding of what consumers want, and are willing to pay for. It is of great relevance to understand new patterns of consumption, to rethink the services they provide, as well as matching shifting needs of seniors and accounting for these changes and challenges in a proactive way. This will not only provide exciting opportunities for further research with older populations but will also specify practical implications for public policy makers, industry practitioners and travel marketers as a whole (Patterson and Balderas, 2018).

2. Methodology

This paper provides a systematic review of the literature as a means of identifying, evaluating and interpreting research relevant on silver travellers and hospitality industry linked to seniors; it discusses different shifts in tourism behaviour and draws implications for the tourism and hospitality industry.

To classify, assess and interpret the existing studies, a systematic literature review was conducted in this study. Following guidelines proposed by Kitchenham (2004) and Ritchie, Lewis, Nicholls & Ormston (2013), the study was conducted in three stages, namely, planning, conducting, and reporting the review.

Systematic searches were undertaken using keywords of publications between 1994 to the present in an iterative search in multiple literature databases such as Web of Science, Scopus, EBSCO, Ovid, ProQuest, Elsevier and Dialnet. Databases were searched using a predetermined set of keywords, which were modified to reflect their findings and to ensure their relevance to this research. The main objective in this first step was to evaluate the progress of academic studies related to the tourism and hospitality industry and also to seniors' preferences, needs, expectations and their future behaviour and motivations. The next step was to classify the articles according to their central focus, aim/s and perspective/s and finally, to gain further studies and approaches, the researcher tracked further citations from the research literature on ageing, tourism and hospitality industry.

It is important to note that there has been a dominance on quantitative research in these studies (Nimrod, 2008) which was criticized by Patterson (2006: 40) who argued that researchers should further develop and apply qualitative methods that will enable them "to gain a better and more in-depth recollection and understanding of the actual trip experience". Sedgley et al. (2011) and Patterson (2006) called for not only the application of more qualitative methods to examine the full breadth of the subject but also for more cross-disciplinary enquiries, particularly in gerontology so as to provide meaningful insight into the lives of this population (Kazeminia et al., 2015).

The open and generative nature of qualitative methods allows for the exploration of such issues without advance prescription of their construction or meaning as a basis for

further thinking about policy or theory development (Ritchie, Lewis, Nicholls et al., 2013).

3. Seniors, tourism and the hospitality industry

3.1. Reviewing the definition of seniors

Some confusion exists over the definition of seniors both as a travel sector and as a market segment (Chen, 2009; González et al., 2009; Jang et al. 2009; Le Serre, 2008; Orimo et al., 2006; Patterson and Balderas, 2018; Patterson, 2018 and Prideaux, Wei, & Ruys, 2004). Following Orimo et al., (2006) conventionally "elderly has been defined as a chronological age of 65 year old or older, while those from 65 through 74 years old are referred to as "early elderly" and those over 75 years old as "late elderly".

Different age cut-offs had been previously used by several tourism researchers (some as young as 50 years of age) which has created confusion in the literature and over time, increasingly younger age groups have been categorised in research samples as 'seniors'. However, other research fields such as gerontology have been more consistent, considering only those who have reached the official retirement age of 65 years and older as seniors, and who were eligible for the Social Security Pension and Medicare in the USA (Patterson 2018). Concurring with Patterson and Balderas (2018), other researchers have defined older populations as two or more age groups comprising those aged 50 to 65 years, and those in their post-retirement age bracket of 65 years and older, the former being the most travelled age group (Dann 2007; Hong et al. 1999).

Besides, there have been various terms used in the literature that have been included within the general definition of older adults (Patterson & Balderas, 2018). These include older market (Carrigan et al., 2004); mature market (Shoemaker, 2000; Wang et al., 2007); 50-plus market (Silvers, 1997); senior market (Reece, 2004); maturing market (Whitford, 1998); and baby boomers (Gillon, 2004).

In any case, the current perception of 'old' is no longer perceived as solely relating to a person's chronological age as it has been found to be an unreliable

predictor of consumer behaviour or a person’s physical health (Ruys and Wei 2001). That is, there are substantial differences between a person’s subjective or ‘felt’ age and their actual birth certificate date or chronological age, which can be misleading in interpreting consumer decisions (Faranda and Schmidt 2000).

The first crucial step toward establishing a successful ageing society may be to review our current definition of elderly from various perspectives (Orimo et al., 2006)

3.2. Senior travellers, Tourism and Hospitality Industry: Facts, Evolution and Consequences Foreseen

There are good reasons for regarding the emergence of societies that have to grapple with the challenges of demographic maturity as evidence of successful development (Howse, 2014). Because older people are often stereotyped as part of the past, they can be overlooked in the surge towards the future (WHO, 2015). Harper (2014:2) stated that it is likely that “future generations of older adults will have higher levels of human capital – in terms of education, skills, and abilities- and better health profiles, and this will enable them to remain active, productive and contributory for far longer”

Research on the tourism behaviour of seniors is vital given the opportunities and challenges that come with the increased size of this market (Huber et al., 2018).

The scholarly literature has extensively examined older tourists and their travel behaviour, especially their travel-related activities, socio-demographic characteristics, preferences, and motivations (Anderson and Langmeyer, 1982; Bai et al., 2001; Balderas- Cejudo et al., 2016-2017; Esiyok et al., 2018; Huber et al., 2018, Guinn, 1980; Hsu, Cai, and Wong, 2007; Javalgi, Thoma and Rao, 1992; Jang, Bai, Hu, and Wu, 2009; Lee, and Tideswell, 2005; Lefrancois, Leclerc, and Poulin, 1997; McGuire, and Norman, 2005; Milman, 1998; Nimrod, 2008; Nimrod and Rotem, 2012; Kim, Woo, and Uysal, 2015; Patterson, 2006-2018; Patterson and Balderas, 2018; Shoemaker, 1989).

Numerous empirical studies of senior tourists have provided evidence of the positive impact that tourism experiences have on their quality of life (Uysal et al., 2016) and health (Ferrer et al., 2016; Gump and Matthews 2000; Sirgy et al., 2011).

Many scholars state that this generation of seniors will become the most significant consumer group of the coming decades, as they are considered the richest generation in the world (Meiners and Seeberger, 2010). Living longer, healthier and wealthier than previous generations makes this group one of the largest prospective market segments for the hospitality and travel industries, industries which are contributing significantly to the leisure sector (Chen and Wu, 2008; Horneman et al., 2002; Huang and Tsai, 2003; Jang and Wu, 2006; Pederson, 1994; Prayag, 2012; Reece, 2004; Shoemaker, 1989; Wang, Chen and Chou, 2007).

Older people are not only growing rapidly in absolute numbers, but have also become substantially healthier. In 1999, over 593 million international travellers were aged 60 years and over. This level of tourism activity accounted for approximately a third of the total amount spent on holidays in that year. By 2050 this figure is projected to grow to exceed two billion trips per annum (World Tourism Organisation, 2001). This increased propensity to travel will increase much more in the future due to a more active generation of seniors that will benefit from higher life expectancy, higher disposable income; improved health standards; a higher number of seniors that are used to travelling; and a change in attitude towards lifetime savings, disposable time and what it should be used for (Möller, Weiermair and Wintersberger, 2007).

Over time, the senior market have undergone considerable changes; from considering older people as a homogeneous market during the 80s, to the 90s with the acceptance of its diversity and complexity which have been emphasised in the consumer marketing literature (Moschis, 2003). Moschis stated that it had been less than 30 years since businesses began to recognise mature consumers as a market segment. Since the early 1980s, the older tourist market has been of increasing interest to researchers in the field of tourism marketing (Blazey, 1992; Javalgi et al., 1992; Nielsen, 2014; Shoemaker, 1989).

Many seniors are active, more independent, enjoy flexible schedules, travel in the off-peak season, take frequent and longer holidays, and outspend the youth market for

leisure activities (Baloglu and Shoemaker 2001; Huang and Tsai 2003; Nimrod and Rotem 2012). Many have the time to travel, are willing to spend a significant amount of their savings doing so (Fleischer and Pizam 2002), are experienced travellers and are now demanding products and services that specifically cater to their needs, preferences and interests (Patterson and Balderas, 2018).

Many senior travellers tend to travel longer distances and stay away from home longer than any other age cohort (Shoemaker 1989; Blazey 1991; Pearce 1999). The older generations are increasingly becoming attracted to undertake a variety of tourism experiences, wanting to experience and discover the world, and this is especially true of baby boomers (born between 1946 and 1964) who have been found to have different attitudes and lifestyles compared to previous generations of retirees (Moschis et al., 1997; Faranda & Schmidt, 2000; Patterson et al., 2016). Several authors point to the baby boomer generation as one that will introduce a profound change in the composition of markets in the decades ahead (Patterson et al., 2016; Prideaux et al., 2001:211). Following Patterson et al., (2016), baby boomers are now bucking the "blue-rinse brigade" stereotype, and openly rejecting the idea of growing old gracefully. As a result, tourism and hospitality operators need to avoid treating baby boomers as "older people" and appeal to their "forever young" attitudes.

As for the decision making process in regard to tourist behaviour, changes that are occurring through the evolution of communication and technology have been dramatic, creating many new opportunities as well as posing other threats (Buhalis, 2000).

According to Patterson and Balderas (2018), in regard to the future of senior travellers, they will have clearer ideas of what they want, making it more difficult to surprise them, and will demand 'personalised' and often exotic location offerings to meet their travel needs. Thompson and Thompson (2009) emphasized that the diverse and idiosyncratic mature market and marketing must be modified to adapt to an entirely different, more complex, and older consumer-based society (Chen et al., 2013).

In the coming decades ahead, we will see major shifts in the leisure and tourism environment reflecting changing consumer values, political forces, environmental changes and the explosive growth of information and communication technology (Dwyer et al., 2009).

4. Discussion

Senior tourism is changing. The unprecedented change in the demographic structure of the population is likely to see a shift in the market (Alen et al. 2012; Nedelea, 2008). Today's retirees are wealthier, better educated, more independent and freer from obligations than in the past (Martin and Preston, 1994), which means that older people are more likely to prioritise tourism (Staats and Pierfelice, 2003). Regarded as a homogeneous group by marketers, it is key to highlight that a number of researchers have stressed on the heterogeneity of senior tourists (González et al., 2010; Khan, 2014; Lehto et al., 2002; Mathur et al., 2006; Moschis, 1997; Nimrod, 2008; Reece, 2004; Shoemaker, 2000; Tung et al., 2011).

One of the biggest challenges that tourism industries and the hospitality sector face is the lack of information or knowledge to help understand what the future seniors will require and need. Being informed about this senior market segment is critical for marketers and providers, because senior consumers are heterogeneous and diverse in their needs and preferences as they experience various events throughout their lives (Moschis, 2003; Mathur, Lee, and Moschis, 2006). Reinvention and innovation in their services will be crucial, as well as personalisation will be a key factor to reach an evolving consumer. While senior travellers are already relatively active, the new generations of seniors to come are more likely to surpass them (Lohmann and Danielsson, 2001). And what we can be sure of is that the demand situation and people's patterns of consumption will change significantly (Meiners and Seeberger, 2010).

To achieve competitive advantage in times of rapid change, tourism stakeholders need to have a clear understanding of this direction of change, and its implications for business or destination management. In this context, the tourism and hospitality industry should benefit from all the opportunities provided, and the greater use of technology will enhance their products and services (Patterson et al., 2016).

All stakeholders will need to provide for the seniors' travel motivations, which includes safety and security, real customer service center, social interaction, memorable and more authentic experiences, cultural amenities, educational offerings and a desire for self-fulfilment.

Understanding the needs, wants and expectations of this growing demographic of seniors who are technologically more connected, healthier, richer and with more spare time than their previous generations should become a strategic priority for the sector.

Following Ferrer et al., (2015) most research recognises that healthy, active older people are more likely to engage in tourism and that by being active and enjoying a diverse leisure and social life through tourism is likely to improve health and wellbeing perceptions (Wei and Milman, 2002). With the rise of life expectancy, increasing attention has been paid to the importance of improving life satisfaction and the prospect of ageing well in the prolonged years, while enhancing wellbeing in later life has long been a policy and practice challenge (Meggiolaro and Ongaro, 2014). Even some authors describe the wish to depart for a holiday as a primary desire essential to the quality of life and as a psychological need to slip away from daily life pressure and/or boredom (Mélon et al., 2018; Richards, 1999).

Findings highlight that there are not only implications for the tourism and tourism industry. The fast increasing share of the ageing population is set to become a challenge and an opportunity also for an active and healthy ageing as senior tourism should be included in public health and wellbeing policy discourses on empowerment and inclusion, as it can contribute and help improving people's quality of life (La Placa & Corlyon, 2014, Bai et al, 2017).

As Tung et al. (2011) noted, the senior travel market is one of the most challenging for scholars to understand due to its inherent complexities. Accounting for the needs, expectations and desires of a mature market in a proactive way may contribute to innovative ways to address some of the gaps identified in the literature as it is the need to understand the wants of an ageing population; the need to expand knowledge of the trends underpinning tourism development and the need to analyze the effects of tourism as a strategy towards an active and healthy ageing.

In conclusion, as Tung et al. (2011) noted, the senior travel market is one of the most challenging for scholars to understand due to its inherent complexities. The approach described offers some insights into senior travellers in an attempt shed some light on this evolving and attractive market segment. Accounting for the needs, expectations and wants of this market may contribute to innovative ways to address some of the gaps

identified in the literature as it is the need to understand the wants of an ageing population; the need to expand knowledge of the trends underpinning tourism development and the need to analyze the effects of senior tourism as an strategy towards an active and healthy ageing.

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