TOURIST BEHAVIOUR IN RETIREMENT
A life course perspective

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Research context: Ageing Europe and UK

• From 2010 to 2060 - EU:
  - 65+ ↗ 17.4% to 29.5%
  - 80+ ↗ 3 times to 12%

• Pressure on pensions and health care systems

• Social policies promoting active and responsible ageing
Functional Activity over the Life Course

A Life Course Approach to Active Ageing

- **Early Life**: Growth and development
- **Adult Life**: Maintaining highest possible level of function
- **Older Age**: Maintaining independence and preventing disability

Disability threshold

- Rehabilitation and ensuring the quality of life

Source: Kalache and Kickbusch, 1997
Tourism and responsible ageing – Underlying hypothesis

Retired people ➔ Market potential ➔ Tourism

Wellbeing benefits

www.exeter.ac.uk/business-school
Two objectives

- Effects of retirement on tourist behaviour?
- Significance of holiday-making for retired people and their wellbeing?
Scope of research project

Life Course Analysis of Retired People and their holiday taking

Stage of intervention responsible ageing

Process of intervention – social marketing
<table>
<thead>
<tr>
<th>Lifecourse</th>
<th>Years</th>
<th>Destinations</th>
<th>Important Activities</th>
<th>Important meanings</th>
</tr>
</thead>
<tbody>
<tr>
<td>Married</td>
<td>1961</td>
<td>Austria (Package)</td>
<td>-</td>
<td>Rest and Relaxation, VFR, health/wellbeing, Family time</td>
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<td></td>
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<td>Wales (VFR)</td>
<td>Visiting different landscapes</td>
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<td>Scotland</td>
<td>Sightseeing cultural activities</td>
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<tr>
<td>Son</td>
<td>1966</td>
<td>Canada (VFR)</td>
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<td>Daughter</td>
<td>1967</td>
<td>Canada (VFR)</td>
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<td>Canada (VFR)</td>
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<td>Scotland</td>
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<td>1991</td>
<td>No holiday</td>
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<td></td>
<td>1992</td>
<td>Wales (VFR)</td>
<td>-</td>
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<tr>
<td>House move to Bristol</td>
<td>1998</td>
<td>Florida</td>
<td>Rest/relaxation, Sightseeing</td>
<td>Wellbeing</td>
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<td>Norway (Cruise)</td>
<td>-</td>
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<td>Switzerland (package)</td>
<td>Adjustments due to medical issues</td>
<td>Health constraints</td>
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<td>Germany (Package)</td>
<td>George (82) and Jane (76) – Middle class</td>
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<td>Black Sea Cruise</td>
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<td>Austria (Package)</td>
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<td>Hungary (Package)</td>
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<td>Scotland (VFR)</td>
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<td>2009</td>
<td>Multiple holidays all by coach at</td>
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</tbody>
</table>
Tourism in post-retirement

- Centrality of tourism, Weiss (2005) essence of retirement
- Nimrod (2008) increased opportunity

- Increased constraints (Blazey, 1992), negotiating mechanism (Hubbard and Mannell, 2001)

- Continuity aspects (Nimrod, 2008)
We are interested in your views…

What has retirement meant for you?
How tourism and recreation may affect wellbeing

<table>
<thead>
<tr>
<th>Category</th>
<th>Studies</th>
<th>References</th>
</tr>
</thead>
<tbody>
<tr>
<td>Satisfaction with tourism services and experience</td>
<td>41 studies</td>
<td>e.g. Neal, Uysal &amp; Sirgy 2007</td>
</tr>
<tr>
<td>Recovery experience</td>
<td>22 studies</td>
<td>e.g. de Bloom et al., 2010</td>
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<tr>
<td>Meaningful situations and events</td>
<td>2 studies / Recent approach</td>
<td>e.g. Moal-Ulvoas &amp; Taylor, 2014</td>
</tr>
<tr>
<td>Multi-sensory and relational experience in specific settings</td>
<td>6 studies</td>
<td>e.g. Willis 2015</td>
</tr>
<tr>
<td>Recreation</td>
<td>53 studies</td>
<td>e.g. Hartig &amp; Staats, 2011</td>
</tr>
</tbody>
</table>
Ageing, tourism and wellbeing - Activities
Ageing, tourism and wellbeing - Setting
Ageing, tourism and wellbeing – The tourist

- Attitude toward innovating in holiday-making
- Levels of positive emotions before going on holiday
Methodological design

- Survey
- Oral histories
- Life Course
  - Statistical analysis
  - Narrative analysis
Survey – 5 sections

General wellbeing

Wellbeing through tourism

Tourist behaviour in pre-retirement

Tourist behaviour in post-retirement

Social demographic information
Approach to wellbeing in the survey

**WELLBEING THROUGH TOURISM**

- During the holiday
- Before the holiday (organization)
- After the holiday (memories, souvenirs)

**WELLBEING THROUGH TOURISM**

- Positive emotions
- Engagement / Involvement
- Relationships (positive)
- Meaning
- Achievement

Positive psychology

**GENERAL WELLBEING**

PERMA profiler (Butler & Kern, 2016)
5-point scale

**Approach to wellbeing in the survey**

Agreement with propositions
5-point scale

When I am on holiday, I...
Sample = 220 respondents

139 females (64%)
78 males (36%)

CURRENT MARITAL STATUS
N = 219

- Married (50%)
- Single (13%)
- Divorced (14%)
- Widow (23%)

Respondents per age category
n = 217

- 55 - 64 years old (11%)
- 65 - 74 years old (56%)
- 75 - 84 years old (25%)
- 85 plus (8%)

Respondents per life phase
n = 217

- Late adulthood (66-80) (68%)
- Late late-adulthood (81+) (16%)
- Transition middle to late adulthood (aged 55-65) (16%)

A vast majority of the sample combines state pension with another scheme
Sample – Past occupations

Past occupations grouped into 7 categories (n=214)

- Professionals, Managers, and Proprietors: 144
- Associated Professionals: 7
- Administrative and Protective Occupations: 27
- Skilled Trades and Similar Occupations: 7
- Sales and Customer or Personal Services: 15
- Elementary Occupations: 9
- Homemakers: 5

PAST OCCUPATIONS GROUPED INTO 4 BASIC CATEGORIES (N=214)

- Highly skilled and proprietors: 67%
- Skilled occupations: 26%
- Elementary occupations: 4%
- Homemakers: 3%
Wellbeing of the sample

General perception of happiness (n=171)

- Not at all: 1
- Slightly: 6
- Somewhat: 10
- Moderately: 102
- Completely: 52

Overall score - PERMA dimensions (n = 152)

- Very low: 0
- Low: 6
- Neither low nor high: 19
- High: 110
- Very high: 17

Score on perceived health (n=193)

- Very low: 4
- Low: 20
- Neither low nor high: 41
- High: 90
- Very high: 38

Feeling lonely (n=220)

- Completely: 12
- Moderately: 25
- Somewhat: 32
- Slightly: 44
- Not at all: 107
Wellbeing of the sample Vs national survey

**General sense of happiness - our data**
(n=171)

- 36% Low
- 4% Medium
- 5% High
- 55% Very high

**Global score on wellbeing - our data**
(n=171)

- 71% Low
- 6% Medium
- 20% High
- 3% Very high

**Happiness – national survey**
ONS, APS – Retired (n=85,930)
April 2012 - March 2015

- 6% Low
- 20% Medium
- 71% High
- 3% Very high

**MEANS**

Our data – general sense of happiness: 8.3/10
global score Wellbeing: 7.4/10
APS – happiness of retired people: 7.7/10
Continuity as a general trend of our survey

Example of frequency of longer and short holidays

Slight difference but NOT statistically significant (based on Wilcoxon signed-rank test)
We are interested in your views…

What about the duration of your longer holidays?
Has it changed after retirement?
Why?
Significant changes found for 14 variables out of 37
(based on Wilcoxon signed-rank test)

<table>
<thead>
<tr>
<th>Variables (frequency of holidays with/to)</th>
<th>Trend</th>
<th>Statistical significance</th>
<th>Effect</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eating &amp; drinking as a main holiday activity</td>
<td>↘</td>
<td>High</td>
<td>MEDIUM</td>
</tr>
<tr>
<td>Destinations visited in childhood</td>
<td>↘</td>
<td>High</td>
<td>SMALL TO MEDIUM</td>
</tr>
<tr>
<td>Destinations Europe (except UK)</td>
<td>↘</td>
<td>High</td>
<td></td>
</tr>
<tr>
<td>Destinations never visited before</td>
<td>↘</td>
<td>High</td>
<td></td>
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<tr>
<td>Physical activities</td>
<td>↘</td>
<td>High</td>
<td></td>
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<tr>
<td>Coast</td>
<td>↘</td>
<td>High</td>
<td></td>
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<tr>
<td>Urban activities</td>
<td>↘</td>
<td>Medium</td>
<td></td>
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<tr>
<td>Mountains</td>
<td>↘</td>
<td>Low</td>
<td></td>
</tr>
<tr>
<td>Countryside</td>
<td>↘</td>
<td>Low</td>
<td></td>
</tr>
<tr>
<td>Camping-caravanning on longer holidays</td>
<td>↘</td>
<td>High</td>
<td>SMALL</td>
</tr>
<tr>
<td>Hotels and B&amp;Bs on short holidays</td>
<td>↗</td>
<td>Medium</td>
<td></td>
</tr>
<tr>
<td>Hotels and B&amp;Bs on longer holidays</td>
<td>↗</td>
<td>Low</td>
<td></td>
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<tr>
<td>Camping-caravanning on short holidays</td>
<td>↘</td>
<td>Low</td>
<td></td>
</tr>
<tr>
<td>Self-catering on longer holidays</td>
<td>↘</td>
<td>Low</td>
<td></td>
</tr>
</tbody>
</table>
We are interested in your views…

What comes to your mind when one speaks of « holidays with eating and drinking as a main activity »?
Relationships between frequency of longer holidays after retirement and other variables

**NO RELATIONSHIP**
- Most social demographic variables
  - Gender,
  - Past occupation
  - Type of pension
- Self-perception of health

**RELATIONSHIP**
- Perceived importance of holidays in post-retirement life (high significance)
- Marital status (Low significance)
  Only Married Vs. Divorced
- Life phase (Low significance)
Regarding frequency of short holidays after retirement

**NO RELATIONSHIP**

- Most social demographic variables
  - Gender
  - Marital status
  - Past occupation
  - Type of pension
- Self-perception of health

**RELATIONSHIP**

- Perceived importance of holidays in post-retirement life (high significance)
- Life phase (Low significance)
Meanings of tourism in post-retirement

• Giving positive meaning to retirement-driven social changes
  ‘When people retire they don’t have the prestige, they’re not an important person.’ Cathy (64) Tourism was viewed as a potential antidote for this loss of status following retirement, by escaping these feelings of lost positions.

• Coping with health issues – negotiating mechanisms
  ‘We do less sightseeing now, with John in a wheelchair it depends how far I can push him. (…) When we were in Budapest we’d go off after breakfast, we are slow, we don’t rush. I can’t do what I used to. It’s not the barriers to taking a holiday, it’s barriers to what we can do when we get there. When we go on cruises they have trips that are organised or graded according to activities’ Mary (64) and John (70)
Regarding frequency of holidays with physical activity after retirement

**NO RELATIONSHIP**
- Most social demographic variables
  - Gender
  - Marital status
  - Past occupation
  - Type of pension
- Life phase

**RELATIONSHIP**
- Self-perception of health (high significance)
- Perceived importance of holidays in post-retirement life (medium significance)
We are interested in your views…

What does holiday-making mean to you in your post-retirement life?

Do you find holidays are a way of finding meaning in life? If so, how? Is such meaning associated with any type of holiday?
Relationships between general sense of wellbeing and tourist behaviour in post-retirement

- **Frequency of short holidays** (medium significance)
  - Less than 1 holiday per year Vs. having more holidays
  - Effect: small to medium

- **Frequency of longer holidays** (small significance)
  - Less than 1 holiday per year Vs. having more than 3 holidays per year
  - Effect: small to medium

- **I often share my holiday memories with others** (medium significance)
  - Strongly disagree Vs higher degrees of agreement
  - Effect: medium to high
Perceptions of tourism contribution to wellbeing

“When I’m on holiday, I…” (5-point scale, strongly disagree – strongly agree)

Results in line with the findings of other researchers:

- I feel I am away from my daily routines *(Agreement - mean: 3.83)*
- I feel I am away from my worries *(Agreement - mean: 3.29)*
- I feel anxious more often than at home *(Disagreement - mean: 3.77)*

Results different from those of other researchers:

- I feel cheerful more often than at home *(Neither agree nor disagree - mean: 3.04)*
- I lose track of time more often than at home *(Neither agree nor disagree - mean: 3.07)*
- I lead a more meaningful and purposeful life than at home *(Disagree - mean: 2.70)*
In pre- and post-trip phases

**Before a trip**

**Enjoying spending time organising next holidays**

- Strongly disagree: 5.6%
- Disagree: 14%
- Neither agree nor disagree: 23.8%
- Agree: 41.1%
- Strongly agree: 15.4%

**After a trip**

**Feeling joyful when remembering past holidays**

- Strongly disagree: 1.9%
- Disagree: 5.1%
- Neither agree nor disagree: 23.7%
- Agree: 58.6%
- Strongly agree: 10.7%

**Often sharing holiday memories with others**

- Strongly disagree: 5.1%
- Disagree: 18.5%
- Neither agree nor disagree: 29.6%
- Agree: 40.3%
- Strongly agree: 6.5%
Limitations

- Possible bias in the participation in the study – Highly skilled occupations
- Income not part of the questionnaire
- Pre-retirement phase: reliance on memory
- Some reluctance to answer question on sense of happiness – 171 respondents (78%) out of 220 answered this question
Summary

• Much continuity between pre- and post-retirement
  ➡️ Suggests intervention may have to come before retirement
• Deteriorating health and negotiating mechanisms
• Relationships between frequency of holidays and sense of happiness
• Importance of escapism
• For some, pre- and post-trip activities associated with positive emotions
• A complex phenomenon - further investigation using qualitative methods
  ➡️ How individuals process opportunities offered by tourism
THANK YOU

What about you…
Do you have any question for us?
Please feel free to ask.