Between Past, Present and Future – Implications of Socio-demographic Changes in Tourism

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Abstract

This paper discusses the possibilities and limits of today's tourism industry analyses regarding the predicted future travel behaviour on the basis of socio-demographic changes. Based on a written survey of German-speaking visitors of a destination in Switzerland, the results support the thesis of cohort-specific travel behaviour. The highlighted changes shall serve as a source for the development of a more diversified supply structure in tourism directed to the mature customer.

1   Between Past, Present and Future

In the year 2050, every fifth person in the world, according to estimates of the United Nations , will be over 60 years old and every sixth person will be over 65 years old (UN 2001). Responsible for this development is the double demographic ageing process (Boksberger & Laesser 2008). On the one hand, the percentage of older people increases because the baby boom generation (the post-WWII high-birthrate generation) had fewer children than their parents. On the other hand, the number of older people increases because of higher life expectancy. The great challenge in tourism lies in the awareness of these demographic changes, their implications for the travel behaviour and their lasting effects (Reece 2004, Nickerson 2000). In order to be able to to quantify and qualify this development, neither assessments of the purchasing power and travel intensity nor traditional segmentation such as "65", "senior citizens/elderly", or "golden agers" are sufficient to cover this trend. In fact, due to the rapid socio-economic developments, every generation now makes its own age and travel experiences under different societal circumstances. With the active participation in the everyday life, senior citizens have not only increasingly become travel enthusiasts but also more discerning and sophisticated in their demands toward the travel experience (Javalgi et al. 1992, Chesworth 2006, Hornemann et al. 2002). There are also tendencies that the demographic ageing of the population is offset by the increased socio-cultural

youthfulness of senior citizens (Höpflinger 2005). Many elderly persons nowadays demonstrate a more "youthful" behaviour than previous generations. This trend is closely linked to the developments in economic wealth and the improved socio-political protection of superannuation and comparable schemes. Consequently, tourism research is called upon to generate reliable knowledge and data about the implications of these socio-demographic changes on tourism.

According to the general principles of market research, the approach is clear: If we want to assess how consumption changes when society ages, the group of over 50-year-olds has to undergo closer scrutiny. Do the same principles also apply to tourism or do the conclusions reached today about 50-year-old tourists only reveal very little about the shape tourism will take for mature travellers in the future? Basically, tourism research distinguishes between cohort-specific travel behaviour and age-specific travel behaviour (Lohmann 2007). In the former case, seniors travel in a similar manner to the middle-aged (this is supported by the social learning theory, see Bandura 1977) which would allow for a prognosis based on current travel analyses of 50-year-olds. In the latter case, the travel behaviour of older and younger people is different (this is supported by the lifecycle theory, see Rapoport & Rapoport 1978) which would also allow for a prognosis based on current travel analyses of 70-year-olds.

In order too test these two hypotheses of tourism market research, this paper presents the results of a relevant study and thus supports the discussion with empirical data.

2   Method

The data was collected in 2006, in the German-speaking part of Switzerland, from people whose details are stored on a database of a tourist destination. The survey was conducted using a written questionnaire and mainly comprises questions about individual travel behaviour. Following a promising trial with students, the questionnaire was designed to question people about their current travel behaviour as well as about their travel behaviour ten years ago and their predicted future travel behaviour in ten years time. To ensure the results of the survey were representative, the questions were oriented towards the Swiss travel and tourism market (Bieger & Laesser 2005). The questions also allow for multiple entries that may be ordered according to priority. With a response rate of 37.2 %, an overall sample size of N=701 was achieved. From the overall sample size, persons between 50 and 60 years old (n=141) and persons between 70 and 80 years old were selected. The sample shows the following socio-demographic characteristics and subjective assessments of their own health status by the respondents.

The analysis conducted was based on the frequency of the entries and is listed in the following tables. To test the two hypotheses, the percentage changes for the 50 and 70 year age group with reference to the cohort-specific travel behaviour

Table 1. Socio-demographic characteristics of respondents

		50-60 n=141	70-80 n=45
Sex	Female	46.1%	20.0%
	Male	53.9%	80.0%
Marital Status	Single	15.6%	11.1%
	Married/Life Partner	76.6%	84.4%
	Widowed	3.5%	6.7%
	Family with Children	27.7%	0.0%
	Family with Grandchildren	0.7%	0.0%
Gross Annual Household Income in Swiss Francs	< 70,000	19.1%	40.0%
	70,000 - 90,000	24.1%	31.1%
	90,000 - 130,000	33.3%	15.6%
	> 130,000	22.7%	6.7%
Health Status	Be Fit and Healthy	74.5%	62.2%
	Have Chronic Health Problems	12.1%	6.7%
	Be Overweight (BMI >25)	14.9%	11.1%
	Have Asthma or other Allergy	7.1%	4.4%
	Be Diabetic	0.7%	4.4%
	Have Cardiac and Circulatory Troubles	5.0%	15.6%
	Be Walking Impaired	1.4%	0.0%
	Be Hearing Impaired	1.4%	6.7%
	Be Visually Impaired	2.1%	4.4%
	Be under great Stress / Feel Depressed	6.4%	0.0%
	Need regular Medication	14.2%	46.7%
	Need regular Medical Treatments	7.1%	15.6%
	Suffer any Medical Condition	3.5%	8.9%

"ten years ago", "now/today" and "in ten years" have been itemised and added up in the respective columns. For the calculation of the age-specific travel behaviour, the percentage change of the 70-year-olds "ten years ago" was added to the 50-year-olds "in ten years" according to the same method.

3   Results

The analysis of the motives for travelling shows that "enjoying scenery and nature", "seeking rest and relaxation" and "having time for family, partner, oneself" are the most important reasons in both age groups, as well as "exercising/ sports" and "doing something for your health" that show an opposing development.

Considering the differences in percentage of the absolute value of entries, the analysis reveals a difference between the cohort-specific travel behaviour of 16.56% and the age-specific travel behaviour of 27.50%. From this, it may be concluded that the structure of reasons for travelling consolidates with age and tends not to change later in life. The smallest percentage changes (added difference) in the sample examined, the reasons for travelling are the most stable parameters of travel behaviour.

Table 2. Travel motivation

Travel Motivation	Ten Years Ago		Now/Today		In Ten Years	
	50-60	70-80	50-60	70-80	50-60	70-80
Exercising/Sports	13.7%	11.3%	11.2%	9.4%	8.9%	8.0%
Enjoying Scenery and Nature	15.9%	23.2%	18.2%	23.5%	17.4%	23.2%
Seeking Rest and Relaxation	13.6%	11.9%	14.9%	12.9%	14.9%	15.9%
Sightseeing	5.5%	7.2%	4.8%	4.7%	4.8%	3.6%
Sunbathing and Swimming	9.0%	3.0%	5.9%	1.8%	5.3%	0.7%
Enjoying Gastronomy	6.2%	5.9%	7.0%	8.8%	6.8%	10.1%
Experience History and Culture	7.5%	8.3%	8.8%	10.0%	9.7%	9.4%
Health (Fitness, Wellness, etc.)	3.1%	4.2%	5.7%	5.9%	8.9%	8.7%
Interacting with People/Socialising	1.8%	3.0%	2.9%	3.5%	3.1%	2.9%
Shopping	1.3%	0.0%	1.0%	0.0%	0.2%	0.0%
Having Time for Family, Partner, Oneself	14.3%	10.1%	12.0%	11.2%	11.2%	13.0%
Learning/Broaden One's Horizon	7.3%	10.1%	7.3%	7.1%	7.9%	3.6%
Others	0.7%	1.8%	0.3%	1.2%	0.8%	0.7%

Regarding the question of the preferred type of travel, "holidays in the country-side/ in the mountains" and "winter holidays in the snow" are central to the re-spondents. "Lake or beach holidays" have experienced the most marked decline. The analysis of type of travel (18.35% vs. 24.54%) also supports the hypothesis of the cohort-specific travel behaviour.

Table 3. Type of trip

Type of Trip	Ten Years Ago		Now/Today		In Ten Years	
	50-60	70-80	50-60	70-80	50-60	70-80
Lake or Beach Holiday	17.6%	9.4%	12.3%	4.9%	12.2%	4.3%
City Break	13.9%	13.0%	14.1%	13.2%	14.4%	9.7%
Excursion by Car/Bus/Coach/Rail	7.9%	10.8%	9.3%	12.4%	10.0%	12.9%
Trip on Cruise/Boat/Yacht	1.9%	5.1%	2.4%	4.1%	3.9%	3.2%
Holdiays in the Countryside/in the Mountains	17.8%	21.7%	19.3%	23.9%	18.1%	27.9%
Spa and Wellness Holidays	2.6%	1.4%	5.6%	4.9%	9.2%	7.5%
Winter Holiday (Snow)	22.5%	21.0%	19.5%	18.2%	15.9%	16.1%
Winter Holiday (Sun and Beach)	3.7%	3.6%	2.6%	5.8%	3.7%	4.3%
Event Trip (Concert, Sport, etc.)	2.8%	3.6%	4.4%	3.3%	3.4%	3.2%
Visiting Friends and Relatives	5.6%	5.8%	7.0%	4.1%	5.9%	5.4%
Special Family Occasion (Wedding, etc.)	2.6%	1.4%	1.6%	1.6%	1.6%	2.1%
Others	1.3%	2.9%	2.0%	3.3%	1.6%	3.2%

Consequently, the same approach was used to examine the details of the booking process, starting with the favourite travel destination, the choice of transport and hotel category and finally the booking of the trip itself.

The analysis of the favourite travel destination illustrates that Switzerland was the most popular travel destination of the respondents ten years ago, today and also prospectively in ten years time. The dominating position of this travel desti-nation results in a marked difference (19.75% vs. 30.10%) in favour of the cohort-specific travel behaviour.

Whereas the sample showed a general tendency towards an increase in travel by train to the travel destination, the analysis highlighted a marked decline of 62.2% to

Table 4. Choice of destination

Choice of Destination	Ten Years Ago		Now/Today		In Ten Years	
	50-60	70-80	50-60	70-80	50-60	70-80
Switzerland	64.5%	75.6%	75.2%	88.9%	68.1%	86.7%
Neighbouring Countries	21.3%	1.3%	14.9%	2.2%	9.9%	2.2%
Rest of Western Europe	2.8%	2.2%	4.3%	4.4%	3.5%	2.2%
Eastern Europe	2.8%	6.7%	2.1%	2.2%	0.7%	2.2%
Africa	1.4%	2.2%	1.4%	2.2%	3.5%	2.2%
USA/ Canada	1.4%	4.4%	4.3%	2.2%	3.5%	2.2%
Central and South America	1.4%	2.2%	0.7%	2.2%	1.4%	0.0%
Middle and Far East	2.1%	2.2%	0.7%	2.2%	1.4%	2.2%
Asia	2.8%	2.2%	3.5%	2.2%	2.1%	2.2%
Australia/New Zealand	0.7%	0.0%	0.7%	0.0%	2.8%	2.2%

Table 5. Means of transport

Means of Transport	Ten Years Ago		Now/Today		In Ten Years	
	50-60	70-80	50-60	70-80	50-60	70-80
Private Vehicle/Rental Car/Mobile Home	66.7%	62.2%	65.2%	51.1%	51.8%	26.7%
Train	19.9%	17.8%	27.7%	40.0%	31.9%	57.8%
Airplane (scheduled or charter flight)	10.6%	13.3%	7.1%	8.9%	9.9%	2.2%
Bus/Coach	6.4%	4.4%	7.1%	4.4%	9.2%	2.2%
Motor Bike/Scooter	1.4%	0.0%	3.5%	0.0%	2.1%	0.0%
Others	1.4%	2.2%	1.4%	2.2%	0.7%	2.2%

Table 6. Type of accommodation

Type of Accommodation	Ten Years Ago		Now/Today		In Ten Years	
	50-60	70-80	50-60	70-80	50-60	70-80
Hotel *+**	5.1%	2.0%	2.2%	2.1%	1.9%	2.5%
Hotel ***	19.7%	24.8%	22.9%	26.1%	20.9%	25.0%
Hotel ****	13.2%	17.8%	21.6%	25.0%	24.1%	26.3%
Hotel *****	3.2%	4.0%	3.8%	4.2%	4.7%	3.8%
Motel/Guest House/Inn/B&B	5.1%	12.9%	6.3%	12.5%	8.2%	10.0%
Own Holiday House/Apartement	7.7%	5.9%	6.3%	3.1%	7.9%	3.8%
RentalHoliday House/Apartement	27.1%	16.8%	23.8%	16.7%	20.9%	16.3%
Camping (incl. Tent, Caravan)	9.4%	3.0%	3.4%	1.0%	3.2%	1.2%
Youth Hostel	3.2%	4.9%	4.1%	3.1%	2.6%	3.7%
Private Accommodation (VFR)	6.1%	7.9%	5.7%	6.2%	5.4%	7.5%

26.7% in the use of private vehicles as the preferred means of transport for 70-year-olds. Although the results of the added changes of 32.25% to 36.30% support the hypothesis of cohort-specific travel behaviour, the calculated difference is the smallest in the entire analysis. Consequently, the choice of means of transport may be regarded as a mixture between cohort- and age-specific travel behaviour.

Contrary to the much-discussed polarisation in the accommodation sector, the analysis results of the accommodation categories show a concentration on three- and four-star hotels. Especially four-star hotels are experiencing an increasing popularity among the 50-year-olds. The calculated difference between the cohort-specific travel behaviour (17.40%) and the age-specific travel behaviour (26.79%) confirms the first hypothesis.

Table 7. Travel booking

Travel Booking	Ten Years Ago		Now/Today		In Ten Years	
	50-60	70-80	50-60	70-80	50-60	70-80
Tour Operator	16.1%	22.0%	15.1%	14.1%	14.1%	16.1%
Travel Agency	31.9%	25.0%	20.6%	18.3%	21.6%	19.6%
Local Tourism Organisation	14.8%	5.9%	19.0%	16.9%	17.0%	14.3%
Carrier/Transport Company	4.9%	10.3%	7.9%	9.9%	7.9%	8.9%
Accommodation Provider	27.8%	32.3%	30.9%	35.2%	30.3%	35.7%
Others	4.5%	4.4%	6.3%	5.6%	9.1%	5.4%

In view of the increasing travel intensity of elderly people (Boksberger & Laesser 2008), booking and the question of efficient information and communication have become the focus of attention. The results demonstrate the increasing importance of direct booking of accommodation. There has also been a noticeable decline of 8.95% in bookings through travel agents in the last ten years. This can probably be ascribed to the increasing experience in travelling and global interconnectedness. Therefore, the analysis of the way in which a booking is made supports the cohort-specific travel behaviour (17.43% vs. 31.65%).

4   Implications of Socio-demographic Changes in Tourism

In the last few years, socio-demographic changes, and with it the increase in the number of mature travellers exhibiting altered travel behaviour, have attracted wider interest in the tourism industry. Analogously, the baby-boom generation, especially due to their enthusiasm for travelling and increased competence as travellers, has become a focus of attention in tourism research (Chandler & Costello 2002, Litrell et al. 2004). The implications of the results of this analysis for the tourism industry are discussed below.

In accordance with Danielsson and Lohmann (2003), it can be assumed that travel behaviour ceases to change or changes only very slowly or insignificantly after reaching a certain age. The findings of this study have confirmed the hypothesis of the cohort-specific travel behaviour. A gradual tendency towards higher levels of comfort and service quality has also been observed (Sund & Boksberger 2008). Only when choosing a means of transport, age-specific behaviour has been observed. The stress-free and comfortable utilization of a transport system is therefore more important than mere cost and time effectiveness. Especially when choosing a means of transport, mature travellers place high demands on quality and safety. A systematic focus on the maturer population in tourism requires an appropriate closed mobility chain (accessibility and disability-friendly facilities on transport systems, accommodation facilities, barrier-free access to other tourist facilities and services) and closed information chains (visual and acoustic orientation aids, service and information facilities).

In general, it has to be stressed that knowing customer demands is essential for planning a target group aligned service and product range for the future. Even regarding the segmentation of the group of mature travellers, the tourism sector is still in need of more detailed insights (Boksberger & Laesser 2008). Undoubtedly, mature travellers should not be viewed as one homogenous group, but should rather be divided according to different interests or activities, such as well-being, art and history, gastronomy, or according to their health (Shoemaker 1989, Horneman et al. 2002, Fleischer & Pizam 2002).

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