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Ka Yan, Little CHENG

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A STUDY OF TRAVEL BEHAVIOR, TRAVEL PREFERENCES,  
AND SUBJECTIVE WELL-BEING OF OLDER PERSONS IN HONG KONG

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LINGNAN UNIVERSITY

2007

A STUDY OF TRAVEL BEHAVIOR, TRAVEL PREFERENCES,  
AND SUBJECTIVE WELL-BEING OF OLDER PERSONS IN HONG KONG

by

CHENG Ka Yan Little

A thesis  
submitted in partial fulfillment  
of the requirements for the Degree of  
Master of Philosophy in Social Sciences (Sociology)

Lingnan University

2007

## ABSTRACT

A Study of Travel Behavior, Travel Preferences,  
and Subjective Well-being of Older Persons In Hong Kong

by

CHENG KaYan Little

Master of Philosophy

Demographic ageing of the population is now well established in Hong Kong and, as elsewhere, is raising increasing concerns about the basic needs and the well-being of older persons. Older individuals vary considerably and may try to enhance their well-being in different ways by a range of leisure activities. The gradually improving financial and physical status suggests travel as a potential leisure activity which might enhance individual well-being and quality of life of older persons.

Previous research about travel has mainly involved marketing and sociological perspectives. The market research to date for investigating customer values of tourism and typologies of tourists in sociological studies largely ignored the subjective, dynamic, and intangible components of consumption experience. These components, however, are important for understanding travel needs of older persons.

The aims of the current study were therefore to identify the characteristics of travel behavior and the main factors that contribute to a pleasurable trip of older persons to investigate travel preferences and travel needs of older persons. The concept of subjective well-being (SWB) which focuses on the positive affect, negative affect, and life satisfaction was found to be useful for understanding the conditions under which travel is desirable to older persons.

Two focus groups were conducted to provide insights for the initial design of an in-depth questionnaire survey of 25 older persons age over 60 or above. Inclusion criteria were that respondents would perceive themselves to be able to travel financially and physically before they completed individual face-to-face interviews. By purposive sampling, respondents were selected from urban areas in Hong Kong from sources including social organizations, the researcher's personal networks, a church, a university, parks, a shopping mall, and public areas in government

buildings.

After collecting and analyzing the data referring to principles of grounded theory, four patterns of travel behavior and outcome of travel regarding to individual well-being were found. Six aspects of travel preferences and nine factors which contribute to a pleasurable trip were identified. Travel needs of older persons were further investigated and implications for providing travel services for older persons to enhance their well-being were discussed.

## DECLARATION

I declare that this is an original work based primarily on my own research, and I warrant that all citations of previous research, published or unpublished, have been duly acknowledged.

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CHENG Ka Yan Little

August 2007

CERTIFICATE OF APPROVAL OF THESIS

A STUDY OF TRAVEL BEHAVIOR, TRAVEL PREFERENCES,  
AND SUBJECTIVE WELL-BEING OF OLDER PERSONS IN HONG KONG

by

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Master of Philosophy

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## **CHAPTER ONE**

### **INTRODUCTION:**

#### **AGEING, SENIOR LEISURE, TRAVEL, AND BEHAVIOR**

This introductory chapter will first highlight the increasing concerns over the quality of life of older persons due to the changing demographic structure in Hong Kong. The concepts of successful ageing and subjective well-being will then be introduced regarding to their relationship with quality of life. This will be followed by discussion of significance of understanding older persons' needs of travel and the limitations of existing literature. It is then argued that market segments in tourism have to be refined in order to understand the travel needs of older persons more precisely. It is then pointed out that travel preferences can be used for understanding how travel may relate to individual well-being. The concepts of travel behavior, motivation for travel and subjective well-being will then be introduced for investigating travel preferences and factors which contribute to a pleasurable trip for older individuals. Lastly, the objectives, the research questions, the significance and the organization of this study will be stated.

### **1.1 Background**

#### **1.1.1 Changing demographic structure of Hong Kong: demographic ageing**

The growing number and enlarging proportion of older population in Hong Kong result in the increasing concerns over the needs and the quality of life of Hong Kong older persons. Due to demographic ageing in Hong Kong, there will be a growing number and expanding proportion of older population. Different parties

including local government, political parties, and social associations pay more attention to the needs as well as the quality of life of older persons while researchers are interested in the social phenomenon related to this enlarging group.

Older persons as a significant portion of the population, like people at different ages, also pursue a higher quality of life by engaging in various leisure activities. Implied by the changing socioeconomic characteristics and gradually improving health status of older persons in Hong Kong, it is estimated that an increasing number of older persons will be able to select more varied leisure activities than before. It leads to questions to be answered: is travel a potential way to enhance older persons' quality of life? If so, what conditions are necessary?

### **1.1.2 Successful ageing: well-being of older persons**

Successful ageing is currently a central concept in gerontology. It is a term commonly used for studying ideal outcomes of ageing process (Bearon, 1996). There are a number of definitions of successful ageing. According to Gibson (1995), successful ageing refers to "reaching one's potential and arriving at a level of physical, social and psychological well-being in old age that is pleasing to both self and others" (p. 279).

The academic work on successful ageing and approaches of public policies reflected the interest and importance of desirable ageing process. It suggested that successful ageing is important for both older persons and the society as a whole. Therefore, it is significant to understand how older persons achieve successful ageing in order to enhancing their quality of life.

Subjective well-being (SWB) is an indicator of quality of life (Diener, Oishi, & Lucas, 2003; Kahneman, Diener, & Schwarz, 1999); more positive SWB implies higher quality of life. It is also pointed out that SWB has its own value in research for understanding and satisfying individual needs. Hence, in the current study, the concept of SWB was adopted to understand the travel needs of older persons. It helps us understand how the quality of life of older persons might be enhanced by satisfying their travel needs.

SWB can be related to many factors. Previous research has found that leisure is a factor that influences SWB (e.g. Gilbert & Abdullah, 2002). Moreover, studies have found positive impacts of leisure on individual well-being (e.g. Searle & Mahon, 1991, 1993). Some people perceive travel as a kind of leisure activity and agree that travel can be used for enhancing individual well-being, like other leisure activities.

Travel is commonly considered as a leisure activity. However, the relationship between leisure and travel is not very clear for comparing them in terms of their effects on individual well-being. Looking at past studies on the relationship between leisure and travel, it remains unclear whether travel is a leisure activity by nature. While some researchers have found that the conditions under which travel is a leisure activity were unclear (Iso-Aloha & Mannell, 1987), some have argued that the two concepts should not be regarded as separate phenomena (Carr, 2002). Since the boundary between the scopes of leisure and travel seemed not very clear, it is not possible to state with certainty, or “unambiguously” when and how travel would become a leisure activity.

Although the ambiguous relationship between leisure and travel did not allow this research project to conclude that travel is beneficial to SWB, previous studies suggested that travel causes some kinds of positive impact on travelers. For example, some studies have reported certain positive effects of travel on individual learning experience and some psychological aspects such as self development (e.g. Gibson, 2002; Roberson, 2003). These findings suggested possible positive effects of travel on SWB under particular circumstances. Therefore, there is a research agenda to investigate whether travel can bring positive effect on SWB and under what conditions it becomes a means for enhancing SWB.

### **1.1.3 The emergence of growing “silver market”<sup>1</sup> in tourism**

It is shown that travel abroad is a quite common activity among Hong Kong inhabitants. Furthermore, there has been an increase of outbound Hong Kong tourists in recent years. According to the data from UNWTO, there were 4,709,000 trips abroad of Hong Kong inhabitants in 2002. It was estimated that 70 in every 100 Hong Kong inhabitants went abroad. In 2003, the year in which SARS<sup>2</sup> occurred, the number of trips abroad decreased to 4,428,000, showing a decrease of 6% compared with 2002. The proportion was 65 per 100 Hong Kong inhabitants being involved in outbound tourism in 2003. The number of trips abroad in 2004 increased by 13%, reaching 5,003,000. This could be understood by 73 among every 100 Hong Kong inhabitants who went abroad. It was pointed out that a large proportion of

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<sup>1</sup> The term “silver market” is increasingly used as the standard for the older market or impact of older persons on the economy.

<sup>2</sup> Severe acute respiratory syndrome (SARS) is a viral respiratory illness. It was first reported in Asia in February 2003. Over the next few months, the illness spread to North America, South America, Europe, and Asia before the SARS global outbreak was contained. The World Health Organization (WHO) reported that 8,098 people worldwide were infected with SARS during the 2003 outbreak and 774 died among these. In the United States, 8 people were found infected and all of them had traveled to other parts of the world with SARS (Department of Health and Human Services, 2004).

Hong Kong inhabitants traveled abroad in the recent years. Moreover, it is estimated that the number of outbound Hong Kong tourists might increase in the coming years.

Another study showed a noticeable portion of older travelers among outbound Hong Kong travelers visiting the Mainland China. According to the statistics in the Report *Socio-economic Characteristics of Hong Kong Residents Making Personal Travel to the Mainland of China, 2006*, the total number of Hong Kong residents' outbound trips to the Mainland increased at an average rate of 8.6% per annum. 66% of all the trips to the Mainland were 43.4 million personal-trips with an increase of 8.3% when compared with 2005 (Census & Statistics Department, 2007). These data showed that it has been more Hong Kong residents to visit the Mainland China and self-guided travel is a popular travel mode among Hong Kong residents. It is estimated that this increasing trend will continue due to the closer economic ties between Hong Kong and the Mainland. Moreover, residents in the age group over or equal to the age of 60 were 15.3% of the total number of trips (Census & Statistics Department, 2007). Hong Kong older persons account for a significant proportion of the outbound Hong Kong travelers to the Mainland. This also suggests an increasing number of Hong Kong older travelers who will visit the Mainland in the future.

Travel is more or less an activity which demands physical and financial abilities and resources. This large proportion of outbound Hong Kong travelers and the gradual improvement in health status and financial status of older persons also indicated an increasing ability to afford travel and projected an increase of senior travelers in the future. As long as they can afford expenditure for travel, they might participate in tourism although there may be a great variation in travel expenditure. Older travelers, compared with other age groups, did not show a significant

difference in travel cost (Qu, Tang, and Zhang, 2004).

The life stage of older person indicates that older persons have a higher flexibility of time and thereby a greater tendency of travel compared with other groups in different life stages. Since many older persons are less constrained by job responsibilities after retirement, they probably have more free time. Their family responsibilities may reduce because their adult children have grown up and no longer need to be looked after. These suggest that older persons, compared with other age groups in different life stages, might have greater time flexibility for engaging in more varied leisure activities in daily life.

As indicated by the establishment of organizations providing travel services especially for older persons, silver market in tourism has been widely recognized in many countries. Although rarely seen among travel service providers in Hong Kong, many social associations and travel agencies catering for older travelers have already been established in many countries. For instance, SAGA is a tour operator which notably serves older travelers in the UK. They provide various travel options and discounts especially for older travelers. As mentioned before, the silver market as well as the market share of older travelers will continue to grow as estimated by the gradually improving financial status and health status. Thus, this proportion of market ought not to be neglected in tourism and the travel needs of older persons are worth investigating.

According to the data in these reports, the proportion of older travelers in the tourism market is not negligible. Given the trend of better financial and physical status of Hong Kong older persons and greater time flexibility for engaging in leisure

activities, older persons form a potential segment in tourism market. Hence, it is argued that silver market in tourism specifically (and tourism-related activities) has been drawing attention from different parties.

The travel need of older persons<sup>3</sup> has its own value in tourism research. Older persons are worthy investigating as an age group because of the characteristics of their life stage. As mentioned on p.6, the characteristics of life stage of older persons indicated that their needs of leisure might differ from that of younger age groups. As such, they could have different travel needs different from other age groups.

With more in-depth understanding of the travel needs of Hong Kong older persons, goods and services in tourism can be more accurately determined, produced and delivered. Hence, research on the travel needs of older travelers is useful for facilitating development of the tourist industry and enhancing quality of life by better satisfying older travelers' needs.

## **1.2 Research in tourism**

The travel needs of Hong Kong older persons have not been very well investigated in tourism research to date. Travel was found to exist long time ago and studies in tourism have been conducted in a range of disciplines such as anthropology, psychology, sociology, management and hospitality, studies of transportation, etc. Actually, the rapid growth of tourism research has been observed along with the increasing concerns over this more widespread phenomenon of tourism. In particular, studies in market research and typologies in sociological

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<sup>3</sup> The word "old" is differently defined in Social Gerontology.

studies have provided insights for understanding travel behavior. However, little is known about the travel needs of older persons. In the following sections, limitations of market research and typologies of tourists in sociological studies in understanding travel needs of older persons are discussed.

### **1.2.1 Limitations of market research in tourism**

The focus of many market studies on tourism has been on customer value (William & Soutar, 2000). Understanding customer value has been regarded as useful for developing marketing strategies which has been regarded as the determinant of customers' decisions and their purchasing behavior (e.g. Zeithaml, 1988; Sheth, Newman, & Gross, 1991b; Bolton & Drew, 1991).

With a clear picture of different values of the customers in the market, suitable marketing strategies can be adopted for targeting different market segments, leading to more desirable outcomes such as higher satisfaction of the customers and better allocation of resources and future development of goods or services.

#### ***Disorientation of customer value***

Although customer value can help us to understand the travel needs of individuals and what products or services are better used for satisfying their needs leading to pleasurable consumption experience in tourism, market studies have not proved very useful for understanding travel needs of individuals. The reasons lie in the two particular limitations of the approach for studying customer value.

First, the complexity of customer value has yet been understood in the market studies. Customer values of individuals were investigated by product-based measures of values such as utility, worth, reliability (e.g. Chang & Wildt, 1994; Sweeney et al., 1997). These studies tended to regard customer value as a trade-off between quality and price in a money paradigm (William & Soutar, 2000). This approach of investigating value construct of tourists is too simplistic for understanding service experiences (Schlechter, 1984; Bolton & Drew, 1991). William and Soutar (2000) criticized that the studies of customer values failed to probe into the nature of value. Research in marketing has lagged in the systematic investigation, explication, and measurement of the perceived value construct (Sinha & DeSarbo, 1998, p. 237).

Second, subjective elements of individual consumption experience in tourism have been overlooked in the market studies. Tourism is a human services activity, not merely a tangible and rigid product. Therefore, customer value of an individual should not be understood or studied by the service providers or other agencies only based on the functional attributes of products or services. Service experience is heterogeneous in nature (Holbrook, 1994). The construct of consumption experience of service industries is intangible, dynamic, and subjective (Boterrill & Crompton, 1996; O' Guinn & Belk, 1989; Jayanti & Ghosh, 1996). The consumption experience is also shaped by the interaction between the producers and the consumers, rather. Even though the functional attributes of a travel service remain unchanged, the consumption experience of different individuals can be different. In other words, different individuals may generate different degree of satisfaction from travel when the same service is delivered. Moreover, individual consumption experience may also be influenced by other external situational factors such as more accessible travel

services and therefore may change with time. Along this line, the subjective elements of individual experience of consuming travel services should not be neglected because of the dynamic nature of tourism.

The multi-dimensionality of customer value and subjective elements of individual consumption experience in tourism are limitations which hinder a comprehensive understanding of the travel needs of an individual.

### ***Limitation of methods adopted for market segmentation***

Another limitation of these market studies lies on the less refined market segments resulting from the method used for market segmentation. Market segmentation<sup>4</sup> is a commonly used for understanding the needs of different market segments in many tourism studies. There are several methods for market segmentations which involve different characteristics for segmenting the markets such as age, gender, socioeconomic status, health status, and living arrangement.

It is reasonably clear and uncontroversial that financial and health situations influence the travel behavior of an individual. Insufficiency in financial resources and poor health easily become barriers of travel. It is more difficult to travel for those who have too poor financial status or poor health status. An individual who travels or decides to travel, is probably someone who perceives their one's financial and physical status as appropriate or sufficient for travel.

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<sup>4</sup> "Market segmentation" is the identification of different divisions of the market based on some similarities of individual characteristics. It enables providers of goods or services to better satisfy needs of portions and identify potential consumers.

Among many market studies in tourism research, customer values of older persons were studied by segmenting travelers based on demographic or socioeconomic variables. These are significant personal factors with respect to travel. Undoubtedly, the findings provide us more understanding of their needs by taking these characteristics into consideration.

However, the market segments have not been sufficiently refined by more sophisticated methods of market segmentation. It is argued that methods of segmentation by demographic and socioeconomic characteristics are rather crude although they can be more easily managed (Swarbrooke & Horner, 1999).

In addition, it seems that possessing financial resources and good health are not in themselves sufficient criteria for an individual to travel; someone might not travel even though he/she can afford the travel expenditure. This indicates that travel might not have a simple direct relationship with age or socioeconomic status. Other factors such as personality may also be one of the determinants for travel. Older persons, in spite of their similar demographic or socioeconomic characteristics, may have various needs and perform differently in engaging in travel. Actually, some Western studies found that travel behavior among older persons differed from each other (e.g. Littrell, Paige, & Song, 2004; Shoemaker, 1989).

Many studies (e.g. Gibson & Lepp, 2003; Elsrud, 2001; Bello & Etzel, 1985) have found that factors other than age or socioeconomic status are related to customer values of travelers. Travel behavior, affected by customer value as mentioned, was related to other factors such as purchase intentions, past consumption behavior, lifestyle, and environmental characteristics (Gibson & Lepp, 2003; Elsrud,

2001; Bello & Etzel, 1985). Furthermore, Williams and Soutar (2000) pointed out that some factors of socio-psychological dimensions (e.g. prestige, social interaction, novelty, hedonism, etc.) interact with factors of traditional functional dimensions (e.g. perceived price, quality, benefits, risks, etc.) to shape individual value construct in a service industry. These suggested that customer value of older persons may be variously shaped by factors other than age or socioeconomic status. Therefore, segmenting the market by demographic or socioeconomic characteristics is not sufficient for understanding the customer values of older persons. Without investigating the possible factors shaping customer values, travel needs cannot be easily understood. Therefore, market research to date has not been very useful to understand travel needs of older persons due to the shortcomings of market segmentation by demographic and socioeconomic characteristics.

It has been argued that other factors could significantly affect customer value of older travelers. It is essential to consider factors apart from those characteristics. This suggests a room for further refinement of market segments in order to understand the travel needs of older persons more accurately.

In the current study, apart from demographic and socioeconomic characteristics, the factors which are possibly related to travel needs of older persons were therefore investigated. Those factors may be taken into consideration for refining market segments in tourism research (see Swarbrooke & Horner, 1999).

### **1.2.2 Limitations of typologies of tourist in sociological studies**

Numerous typologies of tourists have been developed in sociological studies

(e.g. Cohen, 1979; Leiper, 1979; Mo, Howard, & Havitz, 1993; Gibson & Yiannakis, 1992). Among most of those typologies, tourists were classified by their behavior regarding to travel. As mentioned above, travel behavior helps understand customer values and thereby travel needs. Nevertheless, some limitations of the typologies did not allow a comprehensive investigation of travel behavior. The limitations will be discussed under the following four aspects.

***“Descriptive” typologies and "overly reductionist" aspects of studies***

First, it is difficult to understand the travel behavior of an individual owing to the “descriptive” typologies. Swarbrooke and Horner (1999) noticed that many earlier influential typologies (e.g. Cohen, 1972) are not based on empirical data. Furthermore, these typologies were descriptive and not very helpful for understanding travel behavior (Swarbrooke & Horner, 1999). Without a clear picture of *actual* travel behavior, it is not easy to investigate their travel needs based on travel behavior.

In some studies, more recent typologies were developed based on empirical data (e.g. Perreault, Dorden & Dorden 1979; Dalen, 1989; Gallup & American Express, 1989). However, the reliability of studies in tourism has been doubted by McCabe (2005) who criticized that the studies omitted the inherent contextuality of tourists’ talk leading to "overly reductionist" categorization of tourists. He further argued that these studies did not extend far enough in a theoretical and empirical engagement with tourists' taken-for-granted use of language in interview accounts or in naturally occurring interaction. It caused ambiguities of data analysis in the studies. He pointed out weak association between typologies of ‘tourists’ and the actual category

constructions of tourist. Those studies are insufficient for investigating travel behavior because of the overly reductionist in nature.

### *Incompatible typologies of tourists*

Second, the incompatible typologies of tourists make it difficult to investigate and compare travel behavior of different individuals and thereby the differences in travel needs among individuals. Despite more or less similar typologies in terms of dimension for classification of tourists, different theoretical orientations were found among those typologies. Plog (1987) noticed there are a number of typologies with similar dimensions but various labels and he identified eight categories for classifying the typologies. i.e. “venturesomeness”, “pleasure-seeking”, “impassivity”, “self-confidence”, “playfulness”, “masculinity”, “intellectualism”, and “people orientation”. Lengkeek (2001) further argued that these typologies could not be easily compared owing to their different theoretical considerations.

Owing to different theoretical approaches, a tourist can be classified into several groups according to the typologies. However, it is difficult to obtain an integrated model or typology for investigating travel behavior. Hence, the difficulty in integrating the typologies or finding a position in adopting one among many explained the limitation of investigating travel behavior based on those typologies. It is also not quite possible to compare the travel behavior of different individuals and thereby the differences of travel needs among individuals.

### ***Possible alteration of travel behavior due to situational factors***

Furthermore, a number of influential typologies have been developed for more than ten years. Travel needs probably have been altering significantly along with the technological and informational advancements in tourism such as the Internet information, budget travel cruises and mass long-haul holiday markets.

### ***Insufficient knowledge about the effect of cultural factors on travel behavior***

Therefore, differences in cultural values will probably cause different travel behavior. It has been found for a long time that values are related to behavior (Kluckhohn, 1951b; Rokeach, 1973). The differences in values reflect differences in behavior; the similarity between values predisposes a similar way of behavior (Rokeach, 1973). Travelers, with different cultural values, will probably have different travel behavior. This argument is supported by a study focusing on the cross-cultural differences of the perceptions of travelers concerning the impact of political instability on tourism (Seddighi, Nuttall, & Theocharous, 2000). They found significant differences on the way that travelers perceive the impact of political instability on tourism.

Many typologies have been developed referring to tourists from other countries. The explanatory power of these typologies, nevertheless, was confined to other countries and therefore might not be applicable to Hong Kong. It is pointed out that a bias towards Europe and the USA is caused by the vast majority of typologies because of the location of the studies. The validity of those typologies is weakened for applying to all people in different countries due to ignorance of national and

cultural differences (Swarbrooke & Horner, 1999). For example, it has been contended that Urry's work<sup>5</sup> is not useful to study tourist experience in other places because the nature of social, cultural, and geographical settings of the tourism, being critical for understanding the tourist experience, can be very different from that in Britain or people in Europe (Perkins & Thrans, 2001).

Hong Kong is said to be a cultural mix of East and West. Hong Kong was a colony of the UK from 1841-1997 and cultural values of current Hong Kong older persons might partly affected by its cultures. However, the cultural values of Hong Kong people, among whom the majority identified themselves of Chinese nationality, probably are shaped by the traditional Chinese cultural values. A study on outbound Hong Kong travelers also reported the influence of cultural factors on travel behavior (Wong & Lau, 2001). Therefore, the existing typologies might therefore not be useful to understand the travel behavior of Hong Kong older persons who have cultural values different from that of "western" counterparts. Since there is little research about travel behavior and other relevant studies about Hong Kong older persons, it remains an area for further exploration.

To summarize the above limitations, the typologies are probably not quite useful for understanding the travel needs of Hong Kong older persons. The typologies of tourists included "descriptive" theoretical typologies developed at earlier stages and many others with various theoretical orientations. The typologies with different labels, in spite of more or less similar approaches, result in difficulties in integration for investigation and comparison. Furthermore, studies have been

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<sup>5</sup> It is a more recent influential academic work in tourism by John Urry. More details will be provided in Chapter 2.

conducted on Western societies. Differences in cultural values may also cause differences in travel behavior. Therefore, there may be a potential bias when the studies conducted among Western travelers dominated the realm of tourism research. Other factors such as technological advancement in tourism and information technology may also cause probable changes of travel needs.

This study, therefore, is designed to fill the research niche of travel needs of older persons in Hong Kong by considering multi-dimensionality in tourism, subjective components of travelers and factors other than demographic and socioeconomic status.

### **1.3 Understanding travel needs through travel behavior**

As mentioned on p.7, 10 and 13-14, understanding customer values by market segmentation helps understand the needs of various market segments and the differences in values reflect differences in behavior (Rokeach, 1973). Therefore, it is possible to understand travel needs of an individual through investigating one's travel behavior. The current study hence aimed at understanding travel needs of older persons referring to their travel behavior.

#### **1.3.1 The nature of travel behavior**

Although the concept of travel behavior can be easily found in the literature, there is no consensus on the nature of travel behavior. Among some studies, models or theories were developed based on travel behavior which was differently defined (Hoxter & Lester, 1988; Hallab, 1999; Reece, 2004). The concept of travel behavior

was related to behavior of decision-making such as selecting destinations or consumption of goods and services during travel. Therefore, variously defined concepts of travel behavior make it hard to investigate its nature and distinguish it from other activities in daily life. Uriely (2005) pointed out the blurred distinctiveness of travel from daily life experience and division for defining an individual as a tourist. Referring to the different conceptualizations of tourist experience in the studies of tourist role, typologies, authenticity, postmodern, and heritage tourism, it is not easy to obtain a well-defined concept of travel behavior in the previous studies. Therefore, this study tries to understand the concept of travel behavior through another concept, i.e. motivation for travel.

### **1.3.2 Understanding travel behavior through motivation for travel**

Travel behavior has long been viewed as a desire for satisfying individual needs (Pearce & Caltabiano, 1983; Botterill & Crompton, 1996). Many researchers have agreed that travel behavior is often motivated by the desire to satisfy various needs of individuals (Cohen, 1972; Crompton, 1979; Crompton & Lee, 1992; Dann, 1977, 1981; Oh, Uysal, & Weaver 1995; Yuan & Donald, 1990). The causal relationship between motivation for travel and travel behavior has also been supported by numerous studies in tourism (e.g. Reibstein, Lovelock, & Dobson, 1980).

Travel behavior, therefore, can be understood as a result of a desire for satisfying individual needs. In this study, travel behavior is investigated by motivations for travel. Therefore, travel needs can be studied by understanding the patterns of travel behavior of older persons.

#### **1.4 Understanding outcome of travel regarding individual well-being through subjective well-being (SWB)**

Unlike other more tangible goods, the quality of goods or services in tourism is less likely to be known or available before customers' consumption, especially for those aspects that can be provided only when the travelers are present in the destinations. As Swarbrooke and Horner pointed out (1999), travel behavior of different individuals can be very complex because of the involvement of other people including service providers. Referring back to p.9, the construct of consumption experience of service industries is intangible, dynamic, and subjective (Boterrill & Crompton, 1996; O' Guinn & Belk, 1989; Jayanti & Ghosh, 1996). Even though one has undertaken detailed considerations before purchase, the expectations about the quality of goods or service may fall short of the actual experience of an individual consumer. Therefore, the intangibility of the goods and services in tourism implies the possible discrepancies between travelers' expectations and degree of satisfaction of travel needs after consumption.

It has been pointed out that discrepancies between expectations with respect to travel and actual experiences may cause negative outcomes on individual well-being such as stress and health problems (Utecht & Aldag, 1989). In order to understand under what conditions travel leads to desirable outcome and satisfaction of older persons' needs, it is necessary to investigate the subjective outcome of travel regarding individual well-being after individual consumption of the goods and services in question, i.e. tourism.

To investigate the outcome of travel regarding individual well-being of older

persons, subjective well-being<sup>6</sup> (SWB) is a significant concept. The study of SWB may be understood by lay people as the study concerning *happiness* or *satisfaction* (Diener, Oishi, & Lucas, 2003). SWB is a broader concept than “affect”. SWB is less identified with pure emotions than with more comprehensive evaluations concerning the goodness or badness of a given states of affairs – i.e., the extent to which subjects consider that states to be desirable or undesirable (Kahneman, Diener, & Schwarz, 1999). Subjective well-being focused on how individuals evaluate their lives in affective aspect (the feeling of joy) or in cognitive aspect (life satisfaction or satisfaction with specific life domains) (Andrews & Withey, 1976). The cognitive component of SWB may involve life satisfaction in specific life domains including family, friends, home, interpersonal relationships, economic situation, job, leisure, neighborhood, self, services and infrastructure, health and nation (e.g. Gilbert & Abdullah, 2002).

According to Headey and Wearing (1992), subjective well-being (SWB) has both stable and changeable components. The level of SWB fluctuates when the effects of different factors interact with each other. They further illustrated the interactions by more stable “stock levels” and more unstable “psychic income flow”:

For most people, most of the time, subjective well-being is fairly stable. This is because stock levels (social background, personality traits, and social networks), psychic income flows (satisfactions and distress arising from life events in a particular time period) and subjective well-being (analogous to an individual’s wealth or net worth) is in dynamic equilibrium (p.49-50).

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<sup>6</sup> There are different definitions of subjective well-being (SWB). Diener, Oishi and Lucas (2003) defined SWB as “how people evaluate their lives—both at the moment and for longer periods such as for the past year. These evaluations include people’s emotional reactions to events, their moods, and judgments they form about their life satisfaction, fulfillment, and satisfaction with domains such as marriage and work” (p.404). The discussion of subjective measurement of well-being dated back to 1789. The components of individual well-being could be measured by interviews and questionnaires. More about this concept is mentioned in Chapter 2.

It can be seen travel is an activity which involves elements related to some individual specific life domains. Elements such as travel companions, financial expenditure, interpersonal relationships, and self identity are some elements of travel which may cause fluctuations of SWB of an individual.

It is possible to find out whether travel leads to desirable outcomes after older travelers' consumption since they are able to judge whether the outcome is desirable or not after they have experienced the "quality" of the goods and service in tourism. Through understanding what they are happy or unhappy with in their previous trips, which are the components of SWB, one may understand how a person judges whether travel is a desirable event and under what conditions it would be a desirable one. Hence, factors which contribute to a pleasurable trip for an individual can be deduced. For instance, if the respondent considers that travel is a desirable event provided that his or her family goes with him/her, we would know that it is a condition under which travel is desirable to the person. Since travel could be desirable or undesirable to different individuals even though the same type or quality of goods or services are provided, this additional information allows a more comprehensive understanding of the individual appraisal of older persons' travel needs.

To summarize the arguments of the position of SWB in this study, SWB is an appropriate concept for investigating outcome of travel regarding individual well-being and the reasons behind it. Since the same product or service in tourism

may generate different outcomes with regard to well-being among different individuals, it is necessary to probe into subjective evaluation of individuals. The concept of SWB, which comprises three components (namely positive affect, negative affect, and life satisfaction) is adopted in this study for understanding whether and why an individual older person experiences desirable or undesirable outcome in travel and what aspects of travel are more likely lead to the desirable outcome. Through understanding sources of happiness and/or unhappiness stemming from travel, it is possible to extract the factors which contribute to a pleasurable trip. The factors, hence, can be used to understand how travel may relate to SWB and travel needs of older persons.

In summary, based on the respondents' descriptions and explanations of travel behavior and outcome of travel regarding individual well-being, it is possible to understand which aspects of travel (travel preferences) are more important for older persons to satisfy their needs and extract the factors which contribute to a pleasurable trip. These data will allow us to understand the travel needs of older persons and how travel may relate to their SWB. Hence, it is possible to consider how travel may be used to enhance SWB of older persons and whether travel is a good option among different leisure activities for enhancing quality of life.

### **1.5 Objectives of the study**

To address this problem, this research aims to investigate the patterns of travel behavior of Hong Kong older persons, to investigate the outcome of travel regarding individual well-being, and to investigate the travel preferences and the factors which contribute to a pleasurable trip.

## **1.6 Research questions**

Stemming from the review of the literature (Chapter 2) and the thesis approach, four main research questions were posed:

1. What are the factors which contribute to a pleasurable trip to older persons?
2. What are the patterns of travel behavior of older persons?
3. What, if any, are the outcomes of travel regarding individual well-being?
4. For which aspects of travel do older persons have stronger preferences?

## **1.7 Significance of the study**

The study hopefully will contribute to practical and academic aspects.

### ***Theoretical advancements for social gerontology and practical advice in respect to senior tourism***

This study hopefully will enrich the knowledge of social gerontology by investigating the conditions under which travel allows one to enhance individual well-being in later life. Apart from the theoretical advancement which will be contributory to further research in this aspect of tourism, it is useful to achieve successful ageing in later life and contributory to the good of the older persons, their families and the society as a whole.

Older persons will also benefit from various aspects. If we know what factors will lead to pleasurable trips to individuals, older persons can choose the suitable

types of trips according to their travel preferences. Therefore, travel can be used as a more effective means for enhancing their SWB. For instance, suggestions can be provided for older persons about selecting among package tours or designing self-guided tours in order to gain a more pleasurable experience from travel. The implications of this study can help older persons to make better decisions about the forms and the degrees of engagement in travel. In a broader sense, not restricted to travel, they can also take these factors into account when they decide to participate in other activities to enhance their quality of life.

Apart from assisting older persons in decision-making of travel, this study may contribute to the formulation of policies by local government, social organizations, commercial interests and political parties for enhancing social welfare of older persons in Hong Kong. As mentioned above, many parties in Hong Kong are concerned about the well-being of older persons. This study will provide some insights for improving the quality of life of Hong Kong older persons.

### ***Practical advice and information for tourism and hospitality management***

As argued by Hallab (1999), it is essential to understand travel needs in different market segments. He further pointed out that a consumer-led orientation<sup>7</sup> was proved useful for providing a successful experience both for their clients and the providers.

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<sup>7</sup> A consumer-led orientation to the tourism business implies that officials' actions need to rely on a solid knowledge of their clients, their needs, wants, expectations, and behavioral patterns (Haywood, 1990). Such strategy demands that the design, development, and selling of products/services result in tangible results such as solving clients' problems and meeting their needs (Haywood, 1990).

Through this research, the needs of older persons in tourism will be better understood. The study sheds light on market segmentation of tourists by psychographic dimension<sup>8</sup> which is identified as a modern approach among various methods of market segmentation among many aspects of consumption (Swarbrooke & Horner, 1999). The factors identified in this research will help understand the travel needs of older persons in Hong Kong and hence provide insight for travel service providers to satisfy older persons' needs. Through formulation and empirical testing about the real needs of older travelers based on these preliminary findings, it is possible to understand what elements or aspects are crucial for providing a pleasurable consumption experience of goods and services in tourism.

Moreover, practical advice and information for tourism and hospitality management will be provided in this study. It may be used by entrepreneurs and tourism sectors to match the types of goods or services with senior travelers' needs more precisely by formulating more accurate and efficient marketing strategies. For example, travel agencies can design new package tours corresponding to the needs of senior customers. With more accurate marketing strategies, the competitiveness of the companies will increase accordingly.

## **1.8 Organization of the thesis**

This chapter, the introduction, has outlined the rationale behind this study. After highlighting the demographic changes of populations and growing silver markets, it has been argued that travel needs of older persons are not negligible. It is pointed out

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<sup>8</sup> Psychographic segmentation is based on the idea that consumption behavior is determined by their lifestyles, attitudes, opinions and personalities of people (Swarbrooke & Horner, 1999).

that the previous studies to date have limitations for understanding whether and how travel may satisfy the needs of older persons. Literature review revealed the research niche of understanding the travel needs of Hong Kong older persons. The focus of the current study has been stated by stating the research objectives and research questions. Significance of the study, divided into theoretical and practical levels, have been discussed.

Chapter 2 provides a review of the literature on studies on travel behavior, typologies of tourists, and issues related to leisure, travel, and well-being. In Chapter 3, the focus of the study is discussed and also the research design, which includes conceptual definitions of variables and the research methods adopted. Chapter 4 contains the findings from the research. Implications of the research findings will follow in Chapter 5. Finally, conclusions, limitations, and recommendations for further study will be discussed in Chapter 6.

## CHAPTER TWO

### A REVIEW OF THE LITERATURE ON SENIOR TOURISM

#### 2.1 Definitions

There have been a lot of controversies over the definition of an older person. The chronological age is commonly used for defining a person as an older person although there is no standardized criterion. The age of 65 mark the watershed of the transition from middle-aged adults to older persons in many Western countries.

“Tourism” is defined as a short-term movement of people to places some distance from their normal place of residence to indulge in pleasurable activities. It may also involve travel for business purposes (Swarbrooke & Horner, 1999, p. 4).

In terms of scope of tourism, different forms of tourism can be distinguished by traveling to, from or within the boundary of a country (UNWTO, 2006).

Inbound tourism involves the non-residents received by a destination country from the point of view of that destination;

Outbound tourism involves residents traveling to another country from the point of view of the country of origin;

Domestic tourism involves residents of a given country traveling within that country.

“Travel” is a concept which is often interchangeable with tourism (Goeldner & Brent, 2006). It represents all direct elements of travel. It includes such elements as transportation, vacations, resorts and any other direct passenger elements but not

limited to national parks, attractions, and auto use for any of the above purposes.

Although “traveler” and “tourist” are terms we are familiar with in everyday speech, they are not simple concepts. Horner and Swarbrooke (1996) raised some areas related to ambiguity of defining one as a “tourist”:

It does not encompass the lucrative field of business tourism where the main purpose of the trip is for work rather than play. We also have difficulty in deciding how far you have to stay away from home to be classified as a tourist (p.4).

The terms “tourist” and “traveler” were, until recently, used interchangeably to describe “a person who was touring” (Sharpley, 1994). However, nowadays, the two words mean different things. She argued that differences between the terms of “tourists” and “travelers”.

The term “traveler” is usually applied to someone who is traveling/ touring for an extended period of time, particularly back-packing on a limited budget. It contains a spirit of freedom, adventure, and individuality.

The word “tourist”, on the other hand, is frequently used in a rather derogatory sense to describe those who participate in mass produced, package tourism (as cited in Swarbrooke & Horner, 1999, p.84).

Boorstin (1992) distinguished “tourists” and “travelers” by their positions in an “active-passive continuum”. He contended that “travelers” are active pleasure seekers. They go strenuously to search for excitement while “tourists” are passive. They expect that interesting things would happen to them.

In this study, the concept of “tourism” is interchangeable with “travel” and the

concept of “traveler” is interchangeable with “tourist”. There are two reasons. First, no differences in meanings of the words were shown in Chinese. Second, it was found that the respondents in this study used the Chinese terms interchangeably during interviews.

The literature to date only provides limited understanding of the history of travel behavior. Swarbrooke and Horner (1999) pointed out the difficulties to trace the history of travel behavior. On one hand, travel behavior is complex in nature. On the other hand, the relatively little we can derive a history or chronology of early travel behavior by empirical data or artifacts. He further commented on the research conducted on the history of tourist:

Most historians of tourism have tended to focus on Europe, from the Greeks and the Romans to the railway and Thomas Cook in the UK. However, it is important to recognize that tourism has existed in other continents for centuries.

Even though the start of tourist behavior is still not clear, it is believed that some forms of tourism, visiting friends and relatives in particular, appeared in some countries other than Europe.

## **2.2 The development of research journals and studies in tourism**

Although some kinds of tourism appeared many years ago, this phenomenon mass tourism has only drawn wider concerns in academic scopes over more recent decades. The newly recognized research area is reflected from the sudden increase of publication of research journals and other studies in tourism within a relatively short period of time.

According to a book, *Tourism and Hospitality in the 21<sup>st</sup> Century* (Lockwood & Medlik, 2001), the first scholarly research journal in tourism was *The Tourist Review* which was the official publication of the *Association Internationale d'Experts Scientifiques du Tourisme (AIEST)*. 1972 was the year it was joined by *Annals of Tourism Research* in the 55<sup>th</sup> year of its publication, 1917. *Annals of Tourism Research* started publication in 1973. There were a relatively few new research journals in tourism.

Publication of the tourism research journals emerged in the late 1980s and in the 1990s. During that period to present, there is a growth of academic courses about tourism and research in tourism at universities. In 1999, there were some 50 refereed journals being published globally, focusing on broad area of hospitality, tourism and leisure research. It was then estimated that there were around 200 journal issues of journals in tourism per year (Lockwood & Medlik, 2001). As tourism is an issue under investigation in other different disciplines marketing, economics, psychology, sociology, anthropology, geography, and transportation studies, more journal articles with tourism as a focus are also published by research journals in other disciplines.

### **2.3 Successful ageing and theories of ageing**

Some people may link ageing and the inevitable decline of physical functioning and the loss of the ability to be productive (Butler & Schechter, 1995). However, it has been increasingly recognized that there are differences between “usual ageing” and “successful ageing”. Rowe and Kahn (1987, 1998) distinguished the two words. “Usual ageing” refers to ageing in which deterioration of normal functioning is caused by the amplified effects of internal ageing process due to external factors.

“Successful ageing” refers to ageing in which external factors do not necessarily cause decline of functioning. Rather, they have a neutral role or counteract the effects of internal ageing processes, resulting in little or no decrements in functioning.

“Successful ageing” was defined differently. Some of the definitions also involve the concept of “achieving well-being” in different aspects. Gibson (1995) defined “successful ageing” as “reaching one’s potential and arriving at a level of physical, social, and psychological well-being in old age that is pleasing to both self and others.” (p.279). Palmore (1995) referred it to a combination of “survival (longevity), health (lack of disability), and life satisfaction (happiness)” (p. 914).

Bearon (1996) reviewed the literature of successful ageing in gerontology and identified two approaches of models of successful ageing. One approach has involved schemas for successful ageing for ageing individuals who experience hardship such as poverty, rural resilience, poor nutrition, substandard housing, abuse, etc. He referred another approach to “strengths of aging” approach:

... (It) emphasized strengths and growth potential of aging individuals (Sullivan & Fisher, 1994). Presented as an alternative to the “loss-deficit” model of aging, this approach use such concepts as control or self-efficacy (Bandura, 1982), possible selves (Markus & Nurius, 1986), life enrichment, (Manheimer, 1994) and empowerment (Myers, 1990) to describe a lifestyle and stage of life characterized by self-actualization.

He also commented on the “strengths of aging” approach that it followed the approaches of activity theory and continuity theory:

Although somewhat similar to activity theory in its emphasis on action, and even to continuity theory in its developmental orientation, this “strengths of

aging” approach (or collection of related approaches) stressed the inner dimensions of experience and the key role of intrinsic motivation as the foundation for action and the source of resilience for individual as they age.

There are theories of social and psychological aspects of ageing. Some of the major ones are introduced below.

“Disengagement theory”, one of the first theories of ageing developed by Cumming and Henry (1961), stated that the gradual withdrawal and disengagement of people from their social roles is normal and natural response to ageing because of their reduced capabilities, interests, and societal disincentives for participation.

“Activity theory” suggested that it is necessary for people to participate in a full amount of daily activities in order to age most successfully (Lemon, Bengston, & Peterson, 1972).

“Continuity theory”, which has been viewed favorably in recent years, proposes that people age most successfully if they maintain their habits, preferences, lifestyles, and relationships from midlife to later life (Atchley, 1972).

#### **2.4 Relationship between travel behavior and motivation for travel**

As discussed in Chapter 1, travel behavior has been viewed as a desire for satisfying individual needs and the causal relationship existed between travel behavior and motivations for travel. Due to the different definitions of travel behavior and its complexity in nature, the motivation for travel is used for investigating travel behavior in this study.

Regarding research concerning motivations for travel, it has long been asserted that tourists are assumed to be both able and willing to articulate their travel needs (Pearce & Caltabiano, 1983). Travelers may be just like “scientists” who desire to discover what works for them during their travel in order to satisfy their own needs (Botterill & Crompton, 1996).

Motivation for travel refers to the set of needs which predispose a person to participate in travel (Pizam, Neumann, & Reichel, 1979). Many researchers have agreed that travel behavior is often motivated by the desire to satisfy such kinds of travel needs as gaining experience of novel destinations and cultures (Cohen, 1972; Crompton, 1979; Crompton & Lee, 1992; Dann, 1977, 1981; Oh, Uysal, & Weaver 1995; Yuan & Donald 1990). There may be a continuous influence of travel experience on one’s needs. It is pointed out that travel experiences may be used to stimulate some travelers to serve continuity needs (Zimmer, Brayley, & Searle, 1995). In this way, travel can satisfy not only one’s needs *during* the process but also *after* it.

The causal relationship between motivation for travel and travel behavior has also been supported by numerous studies in tourism. For example, the relationships among perceptions, affect, and behavior regarding to choices of transportation modes have been investigated and proved (Reibstein, Lovelock, & Dobson, 1980). It was found that attitudes and behavior mutually influence each other and affect mediates the impact of attribute perception on behavior.

## **2.5 Market research in tourism**

Here, the word "market research" refers to those studies which focused on consumer behavior defined by Horner and Swarbrooke (1996) as “why people buy the product they do and how they make their decisions”.

### ***Market research conducted on foreign older persons***

Many Western travel studies reported certain characteristics of travel patterns of older persons. The behavior of older travelers was often investigated by market segmentation by age. Some studies found that older travelers showed some similarities in travel behavior. For instance, older travelers mainly participated in spectator/recreational or social-engagement activities (e.g. Yu & Littrell, 2003).

Differences in travel behavior were found between different age groups. In a study on behavior of US senior and nonsenior travelers (Javalgi, Thomas, & Rao, 1992), differences were found between the two groups. The result has shown that travel purpose of the older travelers was more likely visiting friends and/or relatives. Positive correlation was found between age and the likeliness of adopting bus as a mode of transportation. Moreover, older travelers had a preference of purchasing services from travel agents including package tours and accommodation arrangements as their preparation prior to travel. Similar results were also found in earlier studies of consumption behavior of older travelers (Quiroga, 1990; Sheldon & Mak, 1987). Moreover, the time spent on preparation for trips has also been found to be inversely related to age (Newman, 1977; Runyon & Stewart, 1987).

However, some studies found variations in travel behavior of older persons. For example, a research conducted by Littrell, Paige, and Song (2004) investigated the differences in travel behavior among three groups of Caucasian senior travelers. The segmentation of the three clusters of senior travelers was based on their engagement of outdoor and cultural activities. The study turned out that senior travelers were involved in both types of activities. After identifying the variations among them, it analyzed the data by making linkages with age. According to the report, Cluster 1 was composed of active outdoor/ cultural tourists, being in the middle of the three clusters in age. Cluster 2 comprised those who showed interests in cultural activities and little inclination for outdoors or entertainment activities. This cluster was the youngest in average age. Finally, cluster 3 were moderate tourists who were the oldest of the three groups. They were those with the lowest interests in all kinds of travel activities among the others.

These studies reported the similarities and differences in travel behavior among older travelers. Market segmentation by demographic characteristics such as age is, as noted in Chapter 1, not a very useful method for understanding the travel behavior of older persons although it is more manageable. Moreover, those research findings suggested that travel behavior is affected by factors other than age. As also mentioned in Chapter 1, it has been contended that other factors such as cultural factors and some psychosocial factors may affect travel behavior. Changes may also occur due to external environmental factors related to tourism (e.g. technological and informational advancements in tourism, and greater accessibility of more varied travel services). It has long been argued that some potential factors influence travel behavior. For instance, personality, in Plog's study (1974, 1987) may also be a factor affecting travel behavior. More details of his study are discussed on p. 41-42.

As indicated by the differences in travel behavior, in spite of a narrower age range, individual older persons may have other different travel needs and thereby preferences for different aspects with respect to travel. Market studies which adopted market segmentation by demographic characteristics to investigate travel behavior have thus failed to provide a comprehensive understanding of customer values, which can be used for investigation of older persons' travel needs.

### ***Market research conducted on outbound Hong Kong travelers***

As mentioned in Chapter 1, differences in cultural values may relate to travel needs of older persons. Investigating travel behavior of individuals with different cultural values may not be useful for have a clear understanding of their travel needs. Therefore, the results of studies on outbound travelers in Western countries may not be applicable on outbound Hong Kong travelers.

Although tourism of Hong Kong has been developed for many years and is concerned by and associated with different associations like Tourism Broad and the local government, only a few studies have been conducted on outbound Hong Kong travelers while quite a number of studies were conducted on inbound Hong Kong travelers.

Like the findings of the studies conducted on Western travelers, some local studies also presented some differences in travel preferences between older travelers and other age groups. For example, Mok and Armstrong (1995) found that older travelers regarded cultural interests and scenic beauty as more important. Qu, Tang, and Zhang (2004) similarly found that older travelers expressed greater interest in

cultural factors and scenic beauty than did their younger counterparts. These age differences in travel preferences suggest that some similarities in travel preferences among Hong Kong older persons.

Previous studies have provided some insights into travel preferences of outbound Hong Kong travelers. In a study by Chu and Heung (2000), the aspects which were identified to be important for selecting travel agency included agency reputation, word of mouth, attitude of staff, value for money, and past experience. Another study found that safety was an important aspect for selecting destinations while local features such as entertainment, recreation, and cultural attractions were unimportant (Mok & Armstrong, 1995; Qu, Tang, & Zhang, 2004). These results showed that some preferences of consumption behavior in travel existed among outbound Hong Kong travelers. It suggested that travel preferences may also exist with respect to satisfaction of their travel needs.

It has been also pointed out that personality is one of the factors which are relevant to travel preferences. Based on Plog's (1974) psychographic continuum<sup>9</sup>, Qu, Tang & Zhang (2004) contended that outbound Hong Kong travelers were classified as "Near-Psychocentrics" who are comfort and safety-seeking, prefer a familiar atmosphere and have low activity levels.

Among a few studies on outbound Hong Kong travelers, there are several limitations in investigating the travel needs of older persons.

First, the studies that do exist have mainly aimed at finding the patterns of

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<sup>9</sup> More about Plog's study will be mentioned on p.41.

travelers' decision-making and consumption. Not many mainly studied the reasons behind respondents' preferences and how they were satisfied with their choices. For example, the study conducted by Mok and Armstrong (1996) found all-inclusive package tours as the most common travel mode and travel agencies as the most significant source of travel information among outbound Hong Kong travelers.

These findings are not very helpful to this research for understanding the travel behavior of outbound Hong Kong travelers, as researchers still cannot understand the reasons for their travel preferences and factors which contribute to a pleasurable trip. Same travel behavior among individuals may be resulted from some factors which affect their travel preferences. For instance, those who joined package tours might consider it as convenient for preparation prior to travel because their sources of happiness from travel is not from preparation for their trips. Some people among participants of package tours, however, may regard preparation for their trips as their sources of happiness from travel. Due to some other factors such as time constraints, they tended to join more time-saving package tours. Those two groups showed the same travel behavior (joining package tours) might have different reasons for their choices. Therefore, these studies are not very helpful to understand the reasons for travel preferences of older persons because the research findings did not distinguish those travelers with different travel needs.

Second, the research findings might only partially represent the situation of older persons. Those studies on outbound Hong Kong travelers were very limited, especially those on older travelers. Those studies were not conducted on older travelers and the proportion of older respondents was usually small in the sample compared with other age groups. The sample of a study by Qu, Tang, and Zhang

(2004), for example, included only about 12% of respondents age 56 or above while more respondents (about 31%) were aged between 18-25. Another study (Lo & Tam, 2004) which aimed at investigating travel preferences regarding to selection of package tours only include a very small portion of older persons in the sample. There was only 2.5% of a total of 200 respondents (i.e. 5 respondents) and most of the respondents were within the age range of 25-34 and 35-44. They comprised 41% and 31% of the sample respectively. The results of those studies might not represent the voice of older persons.

## **2.6 Typologies of tourists in sociological studies**

There are numerous typologies in sociology of tourists according to *styles* of travel behavior. Examples consist of the typologies by Cohen (1972, 1979), Plog(1974, 1987), and Smith (1989).

According to Cohen (1972, 1979), tourists could be classified into 4 categories, i.e. the organized mass tourist, the individual mass tourist, the explorer, and the drifter. The continuum of familiarity to novelty changes from the organized mass tourists to the drifters. The organized mass tourists tend to minimize the novelty of the host community by maximizing their familiarity of the home environment. Travel styles, which allow them to maintain a certain level of familiarity and security, are therefore preferred. These preferences may include all-inclusive package tours, air-conditioned indoor space and transportation, and fixed and well-planned itineraries with the presence or introduction of tour guides.

The individual mass tourists also prefer a familiarity of the environment similar

to the organized mass tourist. They tend to visit the scenery spots and accept the arrangements suggested by travel agents. The difference between the two groups is that the individual mass tourists tend to prefer less structured or itinerary-bound arrangements.

The explorers tend to take an individualized route but at the same time desire comfortable accommodations and reliable form of transportation. They are more open to the host culture with greater willingness to expose themselves to the local cultures.

The last group is drifters who do not show a desire of familiarity. They are willing to contact local people and experience the lifestyle of the host community. They do not stick to usual travelers' routes and may even avoid tourist attractions. They tend to be long-term travelers who try to keep their travel expenditure as little as possible.

Smith (1989) classified tourists into 7 kinds, namely, explorers, elite tourists, off-beat tourists, unusual tourists, incipient mass tourists, mass tourists, and charter tourists. These sub-categories form a continuum of tourists ranging from passive to active participation of local cultures. In between the most extreme groups, charter tourists, and explorers, are mass tourists. The range of travel behavior varies from tightly follow the arrangements of tour packages to request for discovery and new knowledge about the local societies.

Although these typologies involve the concept of travel behavior which helps understand travel needs, such typologies as Cohen's typology (1972, 1979) and

Smith's typology (1989) of tourists are not particularly helpful in understanding the actual travel behavior of Hong Kong older persons in this research. Not being developed from empirical data, these typologies have been criticized as too descriptive for understanding *actual* travel behavior (Swarbrooke & Horner, 1999).

Plog's typology (1974, 1987) of tourists, which was developed empirically, supported the relationship between travel behavior and personality. His typology could be referred as a psychographic model that relates to psychological characteristics (personality types) and behavior (travel choices) of the travelers. Plog proposed a dimension called "psychocentrism versus allocentrism". From the result of his study in 1973, he found the differences in psychological characteristics between travelers by plane and those by transport other than plane. Non-flyers were found to be generally anxious and feared many activities other than flying. They were also found to perceive less capability to deal with problems in their lives and to be less adventurous. Plog, using his dimension "psychocentrism versus allocentrism", describe non-flyers as more psychocentric individuals, meaning they are inclined to be inhibited, nervous, non-adventurous, and constricted. Contrary to psychocentrics, allocentric individuals were self-confident, more adventurous, and more successful in their lives. Besides, it is suggested that personality varies with travel role preference (Cohen, 1972; Frew & Shaw, 1999; Hoxer & Lester, 1987, 1988; Madrigal 1995; Plog, 1974) and perceived risk.

Plog's empirical study noted the influence of personality on travel behavior. In other words, people of different personality showed differences in travel behavior. It has been argued that people of different personality may generate different subjective outcomes of travel regarding to individual well-being even though the same travel

services are provided. Therefore, the factors which contribute to a pleasurable trip can be different among individuals with different personality.

One of the more recent influential work on tourists in sociology is by Urry (1990). He expressed his different views of "tourist" by proposing a newly formed kind of tourist, the post-mass tourist. His study of tourism, *The Tourist Gaze*, was found to have been influencing the later analytic work of tourism. Numerous writings and commentary based on his assertions in the book (Allen, 1991; Britton, 1992; Goodall, 1991; Hamilton-Smith, 1991; Leiper, 1992; Little, 1994; Mellor, 1991; Williams, 1992). Within the debate of the analytical usefulness of the tourist gaze, some raised criticisms against Urry's arguments of tourist experience (see Britton, 1992; Castaneda, 1991; Cloke & Perkins, 1998; Game, 1991; Hamilton-Smith, 1991; Veijola & Jokinen, 1994).

His assertion was inspired by analysis of the "medical gaze" by Foucault (1976). His argument is that the gaze can be used to interpret a whole way of life (Urry, 1992a). Through this approach, one can use the gaze to understand the historical development of tourism and the forms of what is observed and the ways of seeing it. He supported his argument by citing the development of tourism in Britain as an example. He linked the representations of particular places with tourists' practices associated with, and central to, the gaze (Cloke & Perkins, 1998). Urry (1990) noted that the tourist gaze is consistently changing because he regarded tourism marketing is a practice in which tourism marketers and operators are "an arrays of professionals" who attempt to "reproduce ever new objects of the tourist gaze" (p.133).

There are limitations to these classifications of tourists and other more recently developed typologies of tourists (e.g. Perreault, Dorden & Dorden 1979; Dalen, 1989; Gallup & American Express, 1989) in understanding subjective outcomes of travel regarding individual well-being. They have been criticized to be “overly reductionist” categorizations of tourists because the inherent contextuality of tourists’ talk was omitted (McCabe, 2005).

## **2.7 Positive effects of leisure on individual well-being**

Leisure has been found positively related to individual well-being due to its role of achieving and maintaining desirable psychological functioning. Numerous theories and models in psychology have been established to describe and account for the process. Referring to Iso-Ahola’s statement (1984, p.115) “At the core of one’s psychological functioning is the belief that he/she is able to undertake various tasks and activities and is capable of performing them successfully”, perceived locus of control and self competence are the chief elements to human functioning and living. Since leisure enhances psychological functioning by increasing perceived locus of control and self competence, it is beneficial to individual well-being.

The positive effects of leisure have been proven in many educational programs. Leisure has been put into practical use as an instrument for increasing sense of personal control and competence (Searle & Mahon, 1991, 1993). Leisure education has been found useful in enhancing quality of leisure experiences and life quality for many years (Brightbill, 1966; Datillo & Murphy, 1991; Dunn, 1981; Kaplan, 1979; McDowell, 1976). It is also pointed out that the same applies to therapeutic recreation programs as well (Austin, 1991; Peterson & Gunn, 1984). These earlier

findings have been followed by more recent leisure education designed with goals of enhancing independence and promoting greater control and competence (Bullock & Howe, 1991; Bullock & Luken, 1994; Mahon, 1994).

The importance of leisure to older persons is not less than that to other age groups. Moreover, older persons also desire leisure for satisfying their needs of personal control and competence. Many researchers pointed out the significance of leisure to older persons (Larson, Zuzanek, & Mannel, 1985; Larson, Mannel, & Zuzanek, 1986). Its importance can be explained by its enhancement individual control, freedom, and self-determination. It has been pointed out that the importance of leisure is the same in any positions of life stages (Langer & Rodin, 1976; Rodin & Langer, 1977; Schulz, 1976; Schulz & Hanusa, 1978). For this reason, leisure has been considered as beneficial to increasing personal control and competence which enhance individual well-being of older persons. Some studies also found positive effect of leisure on older persons' well-being (e.g. Iso-Ahola et al., 1995). Numerous researchers further pointed out that promotion of independent living is the ultimate goal of leisure education programs (Datillo & Murphy, 1991; Dunn, 1981; Tabourne, 1992).

Numerous research findings have showed a positive relationship between engagement in leisure activities and individual well-being on different aspects. The concept of leisure has been adopted in practice in educational programs and its positive influence on quality of life has been shown for years. It has been argued that there is no age difference in the importance of leisure and positive effect of leisure on individual well-being. It is also suggested that leisure enhances individual well-being by satisfying the needs of older persons in different aspects.

## **2.8 Possible relationships between leisure and travel**

Although there seems to be some similarities between leisure and travel, whether travel is a leisure activity remains as a question. Previous studies on the relationship between leisure and travel lack precision in stating the conditions under which travel is a leisure activity.

According to the theoretical framework proposed by Iso-Ahola (1982, 1984), travel can be a leisure activity with regard to motivations. Two motivational forces, seeking person/ intrapersonal rewards and escaping environments, simultaneously affect leisure behavior of an individual. It has been emphasized that two motivational forces are present for any leisure activities. Along this line, travel can be a leisure activity when it is motivated by the two forces: escaping of routine and stressful environments and seeking of recreational opportunities for certain psychological rewards (Iso-Ahola, 1983).

Contrary to this position, Iso-Ahola & Mannell (1987) asserted that it has yet to be concluded the conditions under which travel is a leisure activity. Their argument was based on the analysis of the nature of travel and leisure in three perspectives, namely "definitional", "post-hoc satisfaction", and "immediate conscious experience" perspectives.

On the other hand, it is sometimes pointed out that tourism and leisure should not be regarded as two separate phenomena. Carr (2002) investigated the relationship between the two concepts by critically reviewing the contemporary literature of pleasurable behavior. It was found that similarities existed between the underlying

influences that define how people behave during their experiences of leisure and tourism. This study thus argued that they ought not to be considered as separate phenomena.

To summarize, similarities in motivation were found in an earlier research study about the nature of travel and leisure (Iso-Aloha, 1983). It suggested the existence of certain conditions under which travel can be regarded as a leisure activity. Nevertheless, it is also argued that it is still not possible to state the conditions under which travel becomes a leisure activity (Iso-Aloha & Mannell, 1987). Another more recent study on the relationship between travel and leisure concluded that the two concepts should not be considered as separate phenomena (Carr, 2002). It is therefore still controversial to state the conditions under which travel is a leisure activity.

## **2.9 Positive effects of travel on individual well-being**

Evidence for the positive impacts of travel on individual well-being is to be found in the literature. Some studies have also suggested that individual needs could be satisfied by travel. SWB may be enhanced through travel as shown by the findings of the following theoretical and empirical studies.

Travel can be a means for reducing excessive stress or obtaining novelty (new experiences) and hence helping to restore the optimum level of psychological stimulations. It has been argued that travel is a means for adjusting the amount of stimulations obtained from travel and hence maintaining or restoring individual optimum level of stimulations. Some theoretical studies asserted that travel could be a way for relieving excessive stress resulted from overstimulation. Iso-Ahola (1983)

contended that not only those who desire to avoid their overstimulating life situations prefer travel, but also those who are understimulated in their personal/ intrapersonal world. Novelty, identified by Crompton (1979), is one of the two pull factors determining the destination choices. Choosing a tour with a particular level of novelty allows novelty seeker to attain one's optimal level of stimulation. Supporting this argument, a later research found that vacation preferences depend on the difference between the individual's optimal or ideal level of stimulation (a personality trait) and actual lifestyle stimulation experiences. Wahlers and Etzel (1985) thus suggested that traveling novel destinations is for stimulation underload whereas traveling familiar environment is for stimulation overload.

Some research studies have argued that travel is beneficial to psychological development, suggesting that travel is a potential activity leading to enhancement of individual well-being. Travel was viewed as a learning process which facilitates personal growth. Mezirow (2000) pointed out that travel increases self-confidence and strengthens self development by allowing individual to learn from managing negative situations during travel. He further explained that differences in language, limitation or patterns of spending money, identification of travel directions and certain locations, etc. are all miniature disorienting dilemmas. Overcoming these barriers allows travelers to gain transformative experience. This experience provides a context for critical reflection which was identified by Brookfield (1995) as a distinguishing characteristic of adult learning. It is further suggested that an adult's development is assisted by anything which causes individuals to develop a more inclusive or permeable point of view (Mezirow, 1991).

Some studies on older travelers also found positive effects of travel on older

persons' learning. In a study about leisure-travel patterns and meanings in later life, Gibson (2002) concluded that older persons who participated in leisure travel obtained educational and spiritual opportunities which became a significant portion of their lives. Some respondents were found to gain learning experience by knowing more about other cultures during the trips and researching in the library. Another study conducted by Roberson (2003), a few older persons who reported positive effects from their intensive travel experiences were interviewed. This qualitative research provided a detailed explanation for what older persons learnt and how they learnt from travel. The results showed positive effects of travel on several aspects of older persons' learning consisting of personal character, trust, the world, and home.

Nowadays, some organizations provided older persons with travel programs for educational purposes. These programs which are designed to be more suited for the older market segment. For instance, Odyssey Travel provides educational travel opportunities for people over 45 and aims at enhancing their well-being and quality of life. The programs are distinguished from more available package tours for the general participants by the theme or the concept of lifelong learning. The programs of Odyssey Travel are designed for satisfying older persons' continuous needs of acquiring knowledge.

To sum up, travel can be a learning process beneficial to personal growth as it can provide opportunities for critical reflection and development of a different point of view. Referring to the research findings and the establishment of organizations aiming at satisfying the travel needs of older persons, it is suggested that certain positive impacts of travel are present on individual well-being of older persons.

The findings of an empirical study support the positive relationship between travel and SWB(Gilbert & Abdullah, 2002). Their study was conducted to investigate the presence of differential levels of SWB between a group of UK outbound tourists and a control group who did not have a holiday to travel. Those respondents who traveled reported a significantly higher SWB than the control group. The two groups were asked to fill in two questionnaires at two different times. One group was asked to fill in the questionnaires before and after they took a holiday for travel for four-nights or longer outside the UK. Another group did not take a holiday to travel. The questionnaires were used to measure the three components of SWB, i.e. positive affect, negative affect, and life satisfaction.

The findings found significant differences between the two groups in terms of current effect, their global well-being (life as a whole) and in three specific life domains: family, economic situation, and health. The group who traveled appeared to be much happier with life as a whole, experience less negative or unpleasant feelings and thus enjoy an overall net positive effect or pleasant feelings. They are also happier with their family, economic, situation, and health domains compared to the control group. The study concluded that the anticipation of a trip has affected the respondents' SWB equilibrium.

## **2.10 No positive effects and possible negative effects of travel on individual well-being**

As a contrast to the positive impacts reported by some travel research, some studies did not find positive effects of travel on individual well-being. Milan (1998), for example, did not find a positive relationship between travel and psychological

well-being of older persons. It has been pointed out that travel may lead to undesirable outcomes such as stress and deterioration of health. According to Spradley and Phillips (1972), cultural differences in food, language, cleanliness, pace of life, recreation, standard of living, transportation, humor, intimacy, privacy, etiquette, and formality required considerable readjustment are identified to be stressors associated with travel. Similar results were reported in numerous studies. (e.g. Furnham, 1984; Pearce, 1981; Prokop, 1970).

Some previous research studies have suggested different factors which affect emergence and intensity of the negative influence of travel on well-being. Some studies have investigated the process through which a culturally different situation leads to subsequent psychological outcomes. As Beano and Ward (2005) pointed out, most studies have agreed that less familiar cultures are more stressful to the travelers and hence causes increased psychological adjustment problems (e.g. Babiker, Cox, & Miller, 1980). Negative psychological effects resulted from cultural differences involved in tourism are also found intermediated by the consistency between expectations and experiences. As long as the characteristics of the ideal and actual tours matches or the benefits "overwhelm" the expectations, positive psychological effects are resulted (Black & Gregersen, 1990). However, discrepancy between the two is found to be associated with negative influences such as increased stress and greater health problems (Utecht & Aldag, 1989).

### ***Summary of relationships among leisure, travel, and individual well-being***

Positive psychological impacts of leisure on individual well-being have been extensively supported by previous studies about the relationship between leisure and

psychological status. Although there has been some discussion about the relationship between leisure and travel, it remains unclear under what conditions travel has the same nature and functions as leisure. Moreover, some studies which have focused on the effect of travel on individual well-being have shown discrepancies. Some researchers have found positive effects resulting from travel while some have contended that negative effects are possible. The evidence of positive and negative effects of travel on individual well-being and findings of the positive relationship between travel and SWB among a very few studies have revealed a research niche of understanding the conditions under which travel leads to positive effects on individual well-being. Upon these research findings, the current study will fill in a gap in knowledge of the relationship between travel and individual well-being.

## **2.11 Possible factors related to travel needs of older persons**

Some studies on motivations for travel provide some insights into travel needs of older persons and how travel may satisfy their individual needs. In these studies, factors have been identified for explaining travel behavior and the process of making travel decisions. Some of these studies are not very relevant to the focus of this study, such as those on the process of decision-making in travel. However, they have been briefly mentioned here as the concepts involved are relevant to the findings including conceptualizations of data in this study.

It has been pointed out in Chapter 1 that travelers with different cultural values may have travel needs. The studies on outbound travelers of Western countries may not be quite applicable to Hong Kong outbound travelers due to some differences in cultural values.

The correlations between some cultural values and travel behavior were found among Chinese travelers (Wong & Lau, 2001). It suggested that cultural factors may affect travel behavior among individuals with different cultural values. The study identified four factors in Chinese travelers' cultural values as relevant to their travel behavior suggested that the effect of cultural factors operated in travel behavior. The study investigated the behavior of Hong Kong Chinese tourists when taking outbound group package tours and the underlying dimensions of Chinese cultural values. Four factors were identified in Chinese tourists' cultural values which were extracted from the Chinese Value Survey<sup>10</sup>. They are social integration, Confucian work dynamism, personal well-being, and moral discipline. Correlation was found between travel behavior<sup>11</sup> and Chinese cultural values. The result suggested certain relationship between cultural values and travel behavior.

Individualism-collectivism is a dimension on which cultural values can be compared. According to Hogg and Vaughan (2005), "individualism is societal structure and world view in which people prioritize standing out as an individual over fitting in as a group member. Collectivism is societal structure and world view in which people prioritize group loyalty, commitment and conformity, and belonging and fitting-in to groups, over standing out as an isolated individual" (p.627).

Traditional Chinese values have generally stressed collectivistic values over individualistic values. Hong Kong may be usually considered as a Chinese community and therefore Hong Kong people may show more collectivistic

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<sup>10</sup> The Chinese Value Survey (CVS) consists of 40 items of Chinese values. The categorization of these four items revealed the four dimensions of cultural variability.

<sup>11</sup> In this study, "travel behavior" was studied by a 22-item questionnaire describing general tourist behavior on group tours. The items were mainly extracted from Pizam and Sussman (1995) who adopted 20 items to describe the behavior of travelers during the trips such as interacting with other tourists, shopping, visiting places rigidly or loosely according brochures, etc.

characteristics than found among Western countries, for example, they may be more willing to accept hierarchical relationships than their Western counterparts. There may be differences in cultural values between Hong Kong's older people than people in previous studies and this might be reflected in dimension of individualism-collectivism.

Dann (1977) used two concepts, "pull" and "push" factors to explain travel behavior. "Push" factors refer to the factors that drive someone to satisfy their needs by travel. On the other hand, "pull" factors refer to the factors that attract someone to features of the destinations. The concepts of "pull" and "push" factors included different but possibly overlapping elements. More specifically, "push" factors which may be psychosocial factors internal to the individual explain the desire to travel (Bello & Etzel, 1985). Adopting Crompton's (1979) view, they include the need for relaxation, exploration, social interaction, and enhancement of kinship relationships among others. "Pull" factors identified by William and Zelinski (1970) included attractive elements related to the destinations such as climatic characteristics, scenic attraction, historical sights, and other destination characteristics.

It has been argued that "push" and "pull" factors not only may have some overlapping elements, but also certain interrelationships (Uysal & Jurowski, 1993). Another study by Oh, Uysal, and Weaver (1995) showed that individual *pull* factors are dependent on two simultaneous factors, i.e. individual motivations for attractiveness and considerations of the "pull" factors as motivators for seeking tourist experience.

Numerous factors or concepts were found to be responsible for travel behavior.

Intellectual curiosity and spirituality have been identified by Achkoyan and Mallon (1997) as primary motivations for travel among older adults. Gibson (2002) also found that factors related to travel including being interested in education, spirituality, gaining a sense of connecting with wider universe and searching for spiritual center. Enjoying time with grandchildren is an important reason for older adults' travel (Loverseed, 1993).

Crompton (1977) suggested a two-stage model to describe the decision-making process of travel. The model involved the roles of perceived situational variables and destination image. Destination choice behavior was determined by the interaction between destination image and perceived constraints such as time, money, travel ability, etc.

These factors, although they partially help understand travel behavior, are not sufficient for understanding what factors are important for satisfying older persons' travel needs nor how travel may relate to their SWB. Rather, some possible factors, which are relevant to travel needs of older persons, were therefore mentioned for further discussion and reference.

## **2.12 Subjective well-being (SWB)**

Subjective well-being (SWB) is today a familiar concept in many research areas, especially to do with older persons. Indeed, it has been examined over many centuries and defined in ethical, theoretical, political, economic, and psychological terms (Lewinsohn, Render, & Seeley, 1991). One definition of SWB is by Diener & Biswas-Diener (2000):

Subjective well-being (SWB) represents people's evaluations of their lives, and includes happiness, pleasant emotions, life satisfaction, and a relative absence of unpleasant moods and emotions. In other words, we gauge a person's evaluation of his or her life by his cognitive and emotional reactions.

Although many definitions, interpretations and applications of SWB can be found, the principal focus of SWB lies on how individuals evaluate their lives in cognitive aspects (e.g., life satisfaction or satisfaction with one's job) or affective aspects (the feeling of joy) (Andrews & Withey, 1976). These elements can be separated (for example, Lucas, Diener, & Suh, 1996). However, the interrelations among these components suggests that there is a higher order construct of subjective well-being (Kozma, 1996).

It is often noted that SWB is a broader concept than the psychological term "affect". Well-being, according to Kahneman (1999), is less identified with pure emotions than with more comprehensive evaluations concerning the goodness or badness of a given state of affairs – i.e., the extent to which subjects consider that state to be desirable or undesirable.

The discussion of subjective measurement of well-being can be date back to 1789. In Jeremy Bentham's (1789) classical utilitarianism, the concept of human well-being could be subjected to empirical measurement appeared as a main element of measuring individual utility. He regarded utility as the difference between pleasure and pain, and speculated that scientific inquiry might link these concepts to observable behavioral and/or physiological variables. More precise conceptualizations of Bentham's terms of "pleasure" and "pain" have been

substituted for by “positive” and “negative” affect in the contemporary behavioral science literature on what Kahneman et al. (1999) term “Hedonic psychology”. Larsen & Fredrickson (1999) referred positive affect to “interest, affection, humor, validation, and excitement/joy” and negative affect refers to “anger, belligerence, domineering, contempt, disgust, tension/ fear/ worry, sadness, whining, and defensiveness” (as cited in Brekke & Howarth, 2002, p.29). In a study by Gilbert and Abdullah (2002), the overall level of well-being was conceptualized as the extent to which positive affect predominates over negative affect.

As an operational construct SWB often comprises three components, i.e. positive affect, negative affect, and life satisfaction. Life satisfaction can be measured on two levels: global and specific life domains such as family, friends, home, interpersonal relationships, economic situation, job, leisure, neighborhood, self, services and infrastructure, health, and nation. These components can be measured variously by interviews and/ or questionnaires. Indeed, there are numerous scales for measuring components of SWB and below are some examples:

*For positive affect and negative affect: Braburn’s (1969) Affect Balance Scale and Affectometer 2*

Another measure, which is used for measuring the affective component of subjective well-being, is Braburn’s (1969) Affect Balance Scale. It is composed of five questions that assess pleasant emotions and five questions that assess unpleasant moods. A scale ranging from zero to five assesses the positive and negative affects.

Affectometer 2 is a 20-item scale developed by Kammann and Flett (1983).

Separate items (PA, NA) were used to measure the overall affection which is calculated from the difference between PA and NA.

*For global life satisfaction: Andrews and Withey's measure (1983) and the satisfaction-with-life scale by Diener et al. (1985)*

Using a Likert Scale type approach, an individual can use a scale from 1 (tremendously unhappy) to 9 (tremendously happy) to indicate his/her response to "how do you feel about your life as a whole?"

Another scale made up of 5 items was developed by Diener et al. (1985). Each respondent can indicate how far they agree with the statement of each item by a scale from 1 (completely disagree) to 9 (completely agree).

*For life satisfaction in specific life domain: Andrews and Withey's measure (1983)*

A multi-item measurement can be used to measure each specific life domain. Respondents are asked to use a scale of 1 (tremendously unhappy) to 9 (tremendously happy) to indicate their response to the multi-items for each specific life domain.

### ***The development of previous studies about subjective well-being***

According to Diener and Biswas-Diener (2000), there are three stages of studies on SWB. The first stage focused on describing and comparing the happiness of people in various categories, especially along demographic dimensions such as age,

sex, income, and education levels.

However, the differences in SWB among individuals can only be explained for a small amount by those external factors (Diener, Oishi, & Lucas, 2003). Personality traits have also been found to be linked with SWB. Moderate to strong correlations have been found between SWB and the traits of extraversion and neuroticism (Costa & McCrae, 1980). Diener, Oishi & Lucas (2003) contended that the relationship between personality and SWB might be oversimplified by extraversion and neuroticism. Some broader dimensions and narrower traits may also have a stronger correlation with SWB.

In the second stage, the validity of measures of SWB was investigated and the measures of SWB were improved. Furthermore, theoretical models of SWB were developed. Variables such as temperament, goal fulfillment, adaptation, and social comparison were incorporated in these models.

In the third stage, current researchers direct at exploring theoretical accounts of SWB that explicitly recognize the varying psychological processes that affect different measures, exploring theoretical models in terms of multiple measures and longitudinal designs (Diener & Biswas-Diener, 2000).

As mentioned in Chapter 1, some components of SWB have been found to be fairly stable while some are more likely to change over time. Headey and Wearing's (1992) explained stability and change of individual SWB by the interaction among different components including more stable components (e.g. social background, personality traits, and social networks) and less stable components (e.g. satisfactions

and distress arising from life events in a particular time period).

SWB fluctuates when one experiences some events which cause positive or negative influences on emotional status. It suggests that some events might cause greater or more frequent fluctuations of SWB when they occur more often and when they also affect other specific life domains. This also suggests that those events might cause the fluctuations of individual SWB at different times and impose a long lasting effect on one's SWB.

SWB is one of the three main types of indicators or measurements that have been developed of quality of life. They are economic indicators, social indicators and SWB. To understand a full range of the quality of life of a society, some argue it is necessary to use different indicators including economic, social, and subjective measures since the strengths and weaknesses of these approaches are complementary (Diener & Suh, 1998).

Economic indicators are fairly used to measure the life quality of societal members at national level in terms such as amount of goods and services produced by a society. The assumption is that increasing services and products produced by the society will contribute to a better life because rational human beings can choose what they desire through their own decisions.

Some researchers have, however, claimed that social indicators are better measures than economic indicators as these fail to reflect other important social welfare aspects which also affect quality of life. A low crime rate, an equitable distribution of resources, a long life expectancy, and human rights are supposed to be

present in a desirable society (Kahneman, Diener, & Schwarz, 1999).

SWB is therefore another approach and maybe more social and welfare oriented to define and measure quality of life. According to the SWB approach, one can obtain a desirable life when one is satisfied, and experiences frequent pleasant emotions and infrequent unpleasant emotions. The society will become “ideal” when all people are happy and satisfied and experience an abundance of pleasure (Kahneman, Diener, & Schwarz, 1999).

***Summary: limitations of previous research and research niche***

Previous research about travel has mainly involved marketing and sociological perspectives. Some market research has aimed to understand customer values by investigations of travel behavior and travel preferences of older persons. Numerous studies among these involve market segmentation by demographic and socioeconomic characteristics. However, these methods of segmentations were rather crude for understanding respondents’ travel needs.

Moreover, the investigation of customer values of travelers largely relied on functional attributes of travel products or services. Much market research to date has largely ignored the subjective, dynamic, and intangible components of customer values which can be closely related to satisfaction of individual travel needs. Studies to date have been insufficient for understanding how travel may relate to individual well-being.

Typologies of tourists in sociological studies have generally been overly

reductionist and have not reached the depth of showing the travel behavior of older persons and therefore may hide some factors related to satisfaction of travel needs. Moreover, other factors such as technological and informational advancements and availability of more varied travel services also suggested some possible alterations of travel needs.

The domination of research conducted on Western travelers and very few studies conducted amongst Asian older travelers also suggested a research niche of investigating the factors which contribute to a pleasurable trip for older persons in Hong Kong. Among a few studies on outbound Hong Kong travelers, only a relatively small proportion involved older respondents in the sample, so the research findings may only partially applicable on older persons.

The current study, therefore, tries to explore

- the differences in travel behavior among older persons and the characteristics of travel behavior of older persons as a group,
- the travel preferences which are the important aspects for satisfying older persons' travel needs, and
- the factors which contribute to a pleasurable trip which help understand how travel might relate to SWB of individual older persons.

## **CHAPTER THREE**

### **RESEARCH DESIGN AND METHODOLOGY**

The main aim of this research is to identify the various factors contributing to a pleasurable trip from the travel preferences of older persons. Based on open-ended guided descriptions of respondents' travel behavior, patterns of travel behavior were to be identified. Travel preferences were then to be deduced from the corresponding patterns of travel behavior. The underlying factors which contribute to a pleasurable trip were identified.

#### **3.1 Research methods**

##### **3.1.1 A qualitative approach**

In a wide range of disciplines, qualitative methods are increasingly adopted for providing insights for complicated issues. As Phillips (1998) pointed out, purely quantitative research methods may not provide a deep understanding of behavior. Qualitative methods are more appropriate for providing insights into complex behavior.

Despite the fact all respondents fulfilled the inclusion criteria of this study and were similar in terms of age, there might be other hidden elements which affect their travel behavior. In order to understand their travel preferences and the factors contributing to a pleasurable trip, it is significant to investigate the reasons behind their travel behavior (their decisions among travel options) and their feelings which might not be represented by a scale in a questionnaire. Moreover, it is necessary to

collect relevant data without restricting the respondents' answers.

Techniques such as focus groups for collecting qualitative data are valued for research in tourism and related areas of consumer behavior (Swarbrooke & Horner, 1999). Qualitative methods in general are regarded as important in tourism research because they can help explore possible hidden elements related to the phenomenon under investigation. Hence, they can provide insights for probing into the complexity of travel behavior whereas more quantitative approaches tend to be able only to describe patterns and statistical relationships.

The aspects under investigation in this study, travel behavior and outcomes of travel on individual well-being, can be complex and related to different, potentially unknown, factors. Qualitative methods are therefore suitable for identifying those potential elements related to travel behavior and outcomes of travel regarding to individual well-being. Open-ended questions and follow-up questions involved in qualitative methods are generally suitable for collecting the relevant data in this study.

Travel behavior, with ambiguities in numerous aspects in tourism research, is thus more appropriate for investigation by qualitative research methods. Hence, a qualitative research approach is chosen in the current study for collecting data through open questions in a semi-structured interview.

### **3.1.2 Focus groups and individual face-to-face in-depth interviews**

In this study, focus groups and individual face-to-face in-depth interviews were

used in pilot tests based on two main reasons. i.e. Richer data and more effective process of data collection.

Focus groups have a long history, originating in market research. Focus groups may be defined as “planned meetings of groups of people, who possess certain characteristics that provide data of a qualitative nature usually through a series of focused discussions” (Phillips, 1998, p. 32). Focus groups not only allow discussions which can help test if previous survey results are supported but also help identify the factors not included in the previous research. Moreover, focus groups involve fewer constraints on responses and allow respondents to give connections between travel choices. Hence, focus group is regarded as a useful method for finding the factors behind travel behavior and the implications of travel choices.

Due to the advantages of focus groups, they were used as a way to collecting initial data for this study. This is a typical use of focus groups, in the early stage of a project to establish information and derive background knowledge. However, there are advantages and disadvantages. First, some interviewees in focus groups are acquaintances; they can feel more or less free to express their thoughts and feelings. Second, more time can be saved when the respondents agree on the answers with each other or amend the answers provided by other members in focus groups. Therefore, focus groups can be an appropriate method for initial data collection for better ensuring that significant factors would not be missed. Moreover, the interaction among respondents helps cognitively stimulate each other and generate a broader and more detailed response, sometimes a consensus, although this is by no means essential.

Although it has been pointed out that focus groups may produce a “halo” effects, the data may be deviate from those collected in private settings. However, the data collected in this study was likely to be less subjected to this effect because the main subsequent data source for analysis was individual in-depth interviews.

Individual face-to-face in-depth interviews were used as the main source of data for the following four reasons.

First, in-depth interviews help obtain accurate personalized data in which respondents could demonstrate their subjective feelings. It is argued that travel preferences and individual evaluation of previous trips are highly subjective and can be very different among respondents. The absence of other respondents can thus minimize halo effects produced by others or location and therefore allows the respondents’ to express themselves and elaborate their answers freely with minimal normative pressure. Therefore, providing an intimate setting for the respondents to express their answers is crucial for reaching “deepest thought” of individual respondent especially related to highly personal aspects of travel.

Second, in-depth interviews allow respondents to have a greater involvement in the process of data provision. The deeper interaction between the interviewer and the respondents can help reveal affective and cognitive components of a pleasurable trip and thereby the corresponding factors. It is asserted that once the level of communication has reached this “depth”, respondents will reveal their true feelings, attitudes, and behavior (Bowling, 1997). Of course, it can be argued that too close a relationship developing can result in types of interview bias, in which respondents attempt to “please” the interviewer with acceptable answers. This has to be guarded

for and probably the risk is minimized in open-ended questions in this type of topic.

Third, individual interviews help to ensure confidentiality of the data provided by the respondents. Since personal travel issues could be sensitive to the respondents, an individual and face-to-face setting is a better method for investigating sensitive issue than a group method as confidentiality of data can be better assured.

Finally, personal interviews are a more effective method for collecting data when the respondents need longer time for completing the interview. In order to explore the factors underlying the behavior in question (“travel behavior” in the current study), follow-up questions can be asked. Hence, more time might be necessary for respondents to answer the questions. Unlike focus groups, individual interviewees do not have to wait until all participants have given their own answers and they need not feel constrained by the fear they are speaking too much or are wasting others’ time. Rather, each respondent is interviewed individually in in-depth interviews. This allows all interviewees to freely elaborate their answers without worrying the time constraints of other respondents.

Interview guides were used in both focus groups and individual face-to-face in-depth interviews. Open-ended questions were used as they allow both greater flexibility in collecting richer data since both interviewers and interviewees have the opportunities to clarify, elaborate, and explain the questions and answers during the data collection process. It is contended that situational factors generate different aspects of information provided by the participants. Interviewers are allowed to obtain richer data by asking more in-depth questions according to the answers given by respondents. This flexibility allows the researchers to modify the questions which

are usually quantified in formal survey questionnaires. Follow-up questions can be asked according to the information collected. Interactions between the interviewer and interviewees and researchers' observation of respondents' behavior are also useful for the researcher to identify some factors which are important but may not be included in the prior area of study. This method has special additional strengths in this research because of the particular aspects of travel, which may not be known at this moment, will become clearer until the respondents give their initial answers. Arguably, too, these face-to-face individual interviews might be deemed more acceptable by older respondents who could tailor their responses to time and emotions.

### **3.1.3 An inductive approach**

Since the patterns of travel behavior of Hong Kong older persons in Hong Kong are still unclear and desirable outcome of travel is subjective, this current study adopted an inductive approach<sup>12</sup> which avoids missing important elements underlying the issues. There are no preconceived theories of their travel needs and space is provided for respondents to describe their travel behavior and outcome of travel regarding to individual well-being. According to respondents' descriptions, elaboration and explanations, data were collected for analyzing the patterns of travel behavior and outcomes of travel regarding to individual well-being. This method avoids too "descriptive" and "over reductionist" results because the analysis conducted and models developed were based on empirical data. A deductive approach, on the other hand, is not suitable for exploration due to its failure to

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<sup>12</sup> An inductive approach follows the logical model called induction. By induction, general principles are developed from specific observations. Deduction is another logical model in which specific expectations of hypotheses are developed on the basis of general principles (Barbie, 2001).

provide the whole range of tourist voice, leading to a danger of ignorance of significant elements. An inductive approach is therefore considered to be a more appropriate method in this research.

### **3.2 Investigation of travel behavior and outcome of travel regarding individual well-being**

#### *Investigation of travel behavior*

As mentioned with explanations in Chapter 1 and 2, travel behavior will be investigated referring to motivations for travel. Geen (1995) defined motivation as the initiation, direction, intensity, and persistence of behavior. In this study, travel behavior of the respondents was studied by referring to these three dimensions, namely, initiation, direction and intensity, and persistence of motivations.

Open questions were used for guiding the respondents to describe their travel behavior to date. The initiation of motivation was measured by purpose(s) of their previous trips. The direction and intensity of motivation were measured by how they prepared for their previous trips and what activities they had participated in during previous trips. The persistence of motivation was reflected from the plans for future travel and response to a hypothetical situation. Respondents were asked whether they had any plans for future travel and the nature of the plans (if any) and how to deal with a gift of a free trip.

***Investigation of outcome of travel regarding individual well-being***

Outcome of travel regarding individual well-being were investigated by the sources of happiness and unhappiness from travel (if any) and the reasons behind were investigated by self-evaluation of respondents.

It is noted that these three components were either stated by the respondents when questions were asked or expressed when the respondents talked about their actions or thoughts with respect to travel. Table 3.1 is a table for summarizing the concepts involved and questions used for investigating travel behavior and outcome of travel regarding individual well-being.

Table 3.1 Investigation of travel behavior and outcome of travel regarding individual well-being

<b>Investigation of travel behavior and outcome of travel regarding individual well-being</b>		<b>Focus of guiding questions</b>
Initiation	Travel purpose	Why did you travel?
Direction and/or Intensity	Preparation prior to travel and participation in activities	How did you prepare for your previous trips? What activities did you join during your previous trips?
Persistence	Considerations for future travel	Do you have any plans for future travel? Why? How would you deal with the gift if you are given a free trip?
<b>Outcome</b>	Sources of happiness and unhappiness (if any)	What are you happy/unhappy about your previous trips?

### **3.3 Recruitment of the sample and data collection procedures**

A purposive strategy was adopted for recruiting respondents for data provision.

The inclusion criteria for respondents for data collection were as follows.

Respondents would be:

- in the age range of 60 or above,
- living in Hong Kong,
- perceived to be physically and financially able to afford travel and
- having been to areas out of Hong Kong.

#### ***Criteria for sample selection***

Many studies about older persons have also recruited samples based on the age of 60 or above. In the *Hong Kong White paper: Social Welfare into 1990's & Beyond*, an older person referred to a person above 60 of age. The official retirement age of public sector employees is 55 to 60. To determine whether a Hong Kong resident is eligible for social welfare for older persons, chronological age is also usually adopted as a criterion for consideration. For many social welfare services in the community for Hong Kong older persons, the age of the eligible users is 60 or above. In the current study, the age range of the respondents was therefore set as 60 or above.

As mentioned earlier, socioeconomic status can partially explain travel behavior but in itself it is not a sufficient criterion for travel to occur; travel behavior is not likely to occur among those who cannot afford the financial and physical demands of travel. In this study, several factors affecting travel behavior were controlled by

narrowing the variations in age, self-rated physical status and self-rated financial status. It is assumed that older persons are quite able to judge their health status and financial situation. Before conducting individual face-to-face in-depth interviews, screening questions were asked to ensure that the respondents fulfilled the inclusion criteria. If they did not fulfill the inclusion criteria, the respondents were excluded.

The criteria of “living in Hong Kong” and “having been to areas outside Hong Kong” were set with considerations with respect to cultural factors and distance of travel for defining a “tourist”.

Two initial focus groups were conducted for exploring the underlying factors influencing travel behavior and hence provided insights for initial design of the interview guide. An in-depth face-to-face interview was conducted with each individual respondent. The sample was chosen from several sources in urban areas. The sources of data included older persons from various social organizations, researcher’s personal networks, a university, a church, a shopping mall, a public park, and public areas of a Smart ID card center. Data also came from key informants including a tour guide and an experienced traveler. Table 3.2 outlines the distribution of geographical locations, the number of respondents, and the methods used for data collection respectively.

Table 3.2 The locations and distribution of participants in focus groups and interviews

Sources of data		Geographic location	Respondents	Method
Social organizations	1. Office of social councilor Mandy Chan Man-Ki	Tsz Wan Shan	9 older persons	Focus groups (4 and 5 persons per group) (pilot test)
	2. Buddhist Ching Hang Neighborhood Elderly Centre	Tsz Wan Shan	10 older persons	
Personal networks of the researcher		Ma On Shan, Yau Tong, Tsz Wan Shan	4 older persons	Face-to-face individual in-depth interview
A university		Tuen Mun	3 older persons	
A church		Cheung Sha Wan	3 older persons	
A shopping mall (Cityplaza)		Tai Koo	1 older person	
A public park		Tsz Wan Shan	1 older person	
Public area in a Smart ID card center (East Kowloon)		Ngau Tau Kok	3 older persons	
N/A		A university	One experienced traveler (Key informant)	
Office of a travel agency		Mong Kok	One tour guide (Key informant)	

The duration of each individual face-to-face in-depth interviews ranged from approximately one hour to two hours. Focus group lasted for one and a half hour to two hours. Interviews were conducted in Chinese and audio typed after obtaining the consensus from respondents. The recordings were transcribed verbatim for further analysis.

### **3.4 Conceptualizations**

#### *Destination*

Destination refers to a unit of geographic location which can be a country, a scenic spot, a building, or an area with certain characteristics. There is no confinement by dimensions such as size.

#### *Travel mode*

Travel mode refers to an objective measurement of transportation such as the type of vehicles (plane/boat) and the duration of the trips/ transportation.

#### *Travel style*

Travel style refers to the subjective measurement of transportation such as the pace of itinerary, comfort of the transportation, interest in/of the activities.

#### *Travel companion*

Travel companion refers to people who go to the destinations along with the older persons.

#### *Nature of activity*

Nature of activity refers to the classifications of the activities by the older

persons. The activities may be those included in a fixed itinerary for the participants of package tours or those which were not included in the fixed or planned itinerary and particularly mentioned or stressed by older persons.

#### *Intensity of participation in the activities*

Intensity of participation in the activities refers to the selection of travel options for more in-depth participation in certain activities such as adjusting the resources on participating in the activities or facilitating participation (such as extending the length of stay in the place, purchasing books for reference, bringing camera as instrument for recording and review, etc.)

### **3.5 Methods for data analysis**

The process of data analysis followed grounded theory approach which is often applied in qualitative studies. After interacting with the respondents in the focus groups, data from audio recordings were analyzed by a careful reviewing of the literature, discussions with my supervisors and academic colleagues, and detailed reading and rereading of the interview notes and transcripts.

The coding was conducted by reading through the transcripts to obtain “first impressions” of the content and then to code transcripts into different areas including travel purpose, preparation prior to travel, participation in the activities, considerations for future travel, sources of happiness, and sources of unhappiness. Under each area, the transcripts were then coded by main themes. These were destination, travel mode, travel style, travel companion, nature of activities, and intensity of participation in the activities. For each theme, sub-themes and

directional coding were inductively derived. The six main themes were categorized by “specifically stated” and “not specifically stated” by the older persons. The analytical framework below was constructed for analysis.

Table 3.3 The analytical framework developed inductively from the data

	Destination	Travel mode	Travel style	Travel companion	Nature of activity	Intensity of participating in the activities
Specifically stated						
Not specifically stated						

These concepts were gradually refined and combined across various interviews. The nature, dimensions, and the causal conditions emerged from the data formed the context from which the patterns of travel behavior, sources of happiness, and sources of unhappiness were achieved by repeated comparison among the categories.

### 3.6 Validity checks: triangulation

Triangulation<sup>13</sup> by source was used to enhance the credibility of the findings in

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<sup>13</sup> Triangulation is defined as a verification method that also enhances credibility of the findings and interpretations. Through comparing verbal, written, and observational self-reports, complex patterns and hidden meanings can be revealed. The two most common types of triangulation involve triangulation by different sources and triangulation by different methods. When data are triangulated by source (e.g. different stakeholders or groups), data are collected from different participants or participant groups; when data are triangulated by method, data are collected by different modes such as interview, written, observation, participant observations, focus groups, etc. (Lincoln & Guba, 1985).

this research. The credibility of the findings in this research was enhanced by triangulation by source. Apart from in-depth interviews with older persons, in-depth interviews were also conducted with key informants who were an experienced traveler and a tour guide. Focus groups were also conducted, giving three sources of data for the triangulation exercise.

## **CHAPTER FOUR**

### **FINDINGS FROM THE RESEARCH**

#### **4.1 Profile of the respondents**

Twenty-five successful personal interviews were conducted with older persons. The background information of the respondents was collected including age, education level, number of children, marital status, place of birth, number of years from retirement, and living in Hong Kong, self-rated financial status, self-rated health status, and destinations of travel.

The age of the 9 males and 16 female respondents ranged from 60 to 79. Many respondents had received no formal education whilst some had obtained several years of education and a few had achieved education level at college and postgraduate level.

Twenty-four respondents were married of whom 8 were widowed. One respondent was single. Most respondents have children and the numbers of children also varies. Most of them were born in Mainland China and residing in Hong Kong for more than several decades. Two respondents had not been hired for formal jobs and they were housewives. For the other respondents, some have just retired (2 years) while some have retired for a longer time (ranging from several years to more than 30 years). Most respondents rated their financial status and health status as “satisfactory” and “good”. There was one respondent responded with “fair” for financial status and health status respectively.

Respondents' destinations for travel showed a variety in distance. Most respondents had been to Mainland China (including Macao) but many respondents had also been to other Asia-Pacific regions including Japan, Korea, Malaysia, the Philippines, Singapore, Taiwan, Thailand, and Vietnam. Some respondents also visited farther afield places such as Australia, Belgium, Canada, Europe, France, Holland, South Africa, the UK, and the USA.

The background information of the 25 respondents is briefly described in the following paragraphs. The respondents are represented by a code which comprises the sex of the respondents and a number assigned. A general profile of the respondents is given on p.182-184. (Appendix V)

*Respondent 1: F1*

This lady, aged 67, had college level education. She is married and has two daughters was born in Mainland China. She has been living in Hong Kong for 20 years. She has been retired for 7 years. She rated her health status as good and financial status as satisfactory. She has been to Europe and Japan.

*Respondent 2: M1*

M1 is 73 years old. He has an education level of high school and has been living in Hong Kong for 61 years. He has married and has a son and a daughter. He has retired for 3 years. He perceived his financial status as satisfactory and his health status as good. He has been to Mainland China.

*Respondent 3: M2*

M2 is 67 and married. He obtained postgraduate level of education. His place of birth is Singapore. He has been living in Hong Kong for more than 30 years. He has retired for 8 years. He mentioned that he worked in the Hong Kong Kai Tak Airport and visited many places before retirement although those trips were relatively short compared with those after retirement. Being asked for the destinations of his travel, he responded with “Seven continents and five seas”. He perceived his financial and health status as “good”.

*Respondent 4: M3*

M3 was 66 years old. He is married and has a son and a daughter. His education is high school level. He was born in Mainland China has been living in Hong Kong for 42 years. He has retired for 9 years. He perceived his financial status and health status as satisfactory. He has been to Australia, Belgium, France, Holland, and Mainland China.

*Respondent 5: F2*

F2 aged 78. She received several years of formal education in primary school. She is widowed and lives independently. She has five daughters. She was born in Mainland China and moved to reside in Hong Kong for more than 60 years. She has retired for 30 years. She rated her financial status as “satisfactory” and health status as “good”. She has been to Australia, Mainland China, Russia, and the USA.

*Respondent 6: F3*

F3, 69, is married and has four daughters and two sons. She received no formal education. She was born in Hong Kong. She took the family responsibilities and did not have a formal job beside home. She rated “satisfactory” for both financial and health status. She has been to France, Japan, Korea, Mainland China, South Africa, Taiwan, and UK.

*Respondent 7: F4*

F4, aged 78, is married and has 3 children. She was born in Hong Kong. She have lived in Mainland China and returned to Hong Kong for 15 years. She retired 20 years ago. Her financial status and health status are “satisfactory”. She has been different regions in Mainland China.

*Respondent 8: M5*

M5 is 60. He was born in Mainland China and has been living in Hong Kong for 59 years. He is single. He received education in high school and some professional training in. He was a teacher in a secondary school before he retired two years ago. He perceived his status in financial and health aspects was “very good”. He has been to Mainland China.

*Respondent 9: F5*

F5 is 78 years old. She received no formal education. She is married and has

two children. She was born in Mainland China. She regarded her financial and health status as “satisfactory”. She has been to Mainland China.

*Respondent 10: F6*

F6 is 73. She has received no formal education. She is widowed and has five children. Her place of birth was Mainland China. She has been living in Hong Kong for 46 years and retired for 15 years. She rated her financial status as “satisfactory” and health status as “good”. She has been to Macao, San Francisco in the USA and Thailand.

*Respondent 11: M6*

M6 is 74. His education was at college level. He is married and has two children. He was born in Mainland China. He has been living in Hong Kong for 28 years. He has retired for 10 years. He rated his financial and health status as “satisfactory”. He has been to Canada, Macao, Thailand, and Mainland China.

*Respondent 12: M7*

M7, 73, is married and has two children. He received formal education in high school. He was born in Vietnam and moved to reside in Hong Kong many years ago. He has retired for 6 years. He perceived his financial and health status as “satisfactory”. He has been to Australia, Canada, Mainland China, and Vietnam.

*Respondent 13: M8*

M8 is 70 years old. He had not received formal education. He is married and has 3 children. He was born in Mainland China and has been living in Hong Kong for 60 years. He has been retired for 8 years. He rated his financial and health status as “satisfactory”. He has been to Australia, Macao, and Mainland China.

*Respondent 14: M9*

M9 who is 67 is married and has a son and a daughter. His place of birth is Indonesia and he has been living in Hong Kong for 34 years. His education level reached college level. He has been retired for 4 years. His financial and health status was perceived as “satisfactory”. He has been to Mainland China and the USA.

*Respondent 15: M4*

M4 is 74 years old. He received no formal education. He is married and has four children. Born in Mainland China, he was a resident in Hong Kong for 50 years. He has been retired for 6 years. He rated his financial status as “satisfactory” and health status as “very good”. He has been to Mainland China.

*Respondent 16: F7*

F7, 77, did not receive formal education. Her marital status is widowed and she has four children. She was born in Hong Kong. She was a housewife and did not have a formal job. She regarded her financial status as “fair” and health status as

“satisfactory”. She has been Mainland China, Philippines, and Vietnam.

*Respondent 17: F8*

F8 is 79 years old and married. She has no children. She was not formally educated. The place of her birth is Mainland China and she has been living in Hong Kong for more than 60 years. She has been retired for 9 years. She regarded her financial and health status as “satisfactory”. She has been to Mainland China, Malaysia, Philippines, Singapore, Thailand, and the USA.

*Respondent 18: F9*

F9, 79, is widowed. She has five children. She did not receive formal education. The place of her birth is Mainland China and she has been living in Hong Kong for more than 60. She has been retired for 12 years. She perceived her financial and health status as “satisfactory”. She has been to Canada, Mainland China, and Thailand.

*Respondent 19: F10*

F10 is 69 years old, married and has two children. She was not formally educated. She retired more than 10 years ago. She has been residing in Hong Kong for more than 50 years. She rated her financial and health status as “satisfactory”. She has been to Canada, Mainland China, and Thailand.

*Respondent 20: F11*

F11, 74, is married. She has five children. She was born in Mainland China and has been living in Hong Kong for more than 40 years. She received no formal education. She retired long time ago. Her financial and health status was satisfactory to F11. She has been to Mainland China.

*Respondent 21: F14*

F14 is 71 years old. She is widowed and has six children. She was born in Mainland China and has been living in Hong Kong for 42 years. She was not formally educated. She rated her financial and health status as “satisfactory”. She has been to Japan, Mainland China, Malaysia, Singapore, and Thailand.

*Respondent 22: F15*

F15, 64, was born in Mainland China. She has been living in Hong Kong for 50 years. She did not receive formal education. She is married and has four children. She retired 10 years ago. She regarded her financial status as “satisfactory” and health status as “fair”.

*Respondent 23: F16*

F16 was 72 years old. She was widowed and has four children. She was born in Mainland China and has been residing in Hong Kong for 49 years. She received 5 years of formal education. She was a housewife and was not formally hired in

younger days. She rated “satisfactory” for financial status and health status. She has been to Mainland China.

*Respondent 24: F12*

F12 was 76 years old. She is widowed and has two children. She did not receive formal education. She was born in Mainland China and has been living in Hong Kong for “many years”. She retired 10 years ago. She regarded her financial and health status as “satisfactory”. She has been to Macao, Mainland China, Philippines, and Taiwan.

*Respondent 25: F13*

R13, 77, was born in Mainland China. She has been living in Hong Kong for 47 years old. She is widowed and she has a son and a daughter. She received formal education for three years in primary school. She has been retired for about 10 years. She perceived financial status and health status as “satisfactory”. She has been to Japan, Mainland China, and Taiwan.

As discussed in Chapter 3, the data generated from the 25 interviews were analyzed as in terms of

1. patterns of travel behavior, outcome of travel regarding individual well-being,
2. travel preferences and
3. factors contributing to a pleasurable trip.

In section 4.2 to 4.4, findings are to be presented in the above sequence.

## **4.2 Four patterns of travel behavior and outcome of travel regarding individual well-being**

The respondents showed the four different patterns of travel behavior, sources of happiness and sources of unhappiness in general. Most of the older persons showed one of the four patterns in particular (Pattern I, II, III or IV). Two of the 25 older persons were found to show elements of partially of two patterns (Pattern II and IV). To illustrate each of the four patterns, discussions for each pattern will be divided into 6 areas which have been mentioned and explained in Chapter 3. They are respectively represented by sub-headings A) Travel purpose, B) Preparation prior to travel C) Participation in activities, D) Considerations for future travel, E) Sources of happiness, and F) Sources of unhappiness.

### **A) Travel purpose**

The respondents showed a variety of travel purposes including sightseeing, satisfying curiosity, gaining a sense of relaxation, broadening individual horizons, meeting friends and/or relatives, treasuring travel opportunities, satisfying past desires, responding to invitation, and “personality”.

### ***Pattern I***

Sightseeing is one of purposes for travel. Respondents in this pattern had a particular place for sightseeing prior to their previous trips. F1, for example, had a clear purpose to appreciate “beautiful” things in Paris.

*F1: Every time we went to a place, we had a strong objective. The objective is relatively strong. That time we went to Europe...I knew seven countries in Europe (but) I wanted to go to Paris in France mainly. There are many beautiful things in Paris...*

Broadening one's horizons was a purpose. As M2 mentioned, he regarded travel as a means for satisfying his curiosity. Through travel, he wanted to broaden his horizons.

*M2: Now, for that we go to travel, curiosity is one of the factors.*

Satisfying previous desires drove some respondents to travel. M2 and F1 mentioned that due to the limitations of their work and other activities before retirement, they had not had time to travel. Even though they could have traveled, their choices of destinations and travel mode were limited. After retirement, they could go to a place where they were interested but had not been able to visit in the past. In other words, only those things they had been unable to see were their interests of travel. M2 said that shopping was not his purpose for travel because he had already done a lot of shopping in the past.

*M2: The trips I went on before I retired, when I was younger, were shorter. One reason was the limitation of the time; the holidays in a year were limited. Therefore, the trips were more likely to be glancing... Since we have such amount of time and ability, we can arrange for some trips which we desired but we did not have the time and ability to go in the past...*

*F1: ...This was because we did not have time to go. In the past..., it's not possible to stay there for a long time. Now, after the tour left, we stayed there for another week.*

*M2: We don't go to a place especially for shopping...Now, we won't go to Japan for shopping intentionally. It's because shopping is something we have done a lot for many years. This is not one of our travel purposes.*

Gaining a sense of relaxation initiated travel behavior of members of Pattern I. Being asked the reasons for his past trips, M2 stated that he concentrated on those trips which were more relaxing to him.

*M2: After retirement, my trips concentrated mainly on more relaxing activities.*

*M2: I want to stress that my trips after retirement would concentrate on those things which are more “deluxe”, more relaxing, and more pleasurable.*

Killing time was not a purpose for respondents in this pattern. Although they had relatively more free time now retired, which allowed them to leave Hong Kong for a longer time, F1 mentioned that killing time was not a purpose of travel.

*F1: We won't travel only to kill time. Our motive for travel is very strong. I would ask myself, “What is the main purpose for my participation (in travel)?”*

## ***Pattern II***

Sightseeing was a purpose of travel for Pattern II members. M3 went to see the newly built hotel in Mainland China. The natural scenery in Mainland China attracted F2 to travel there.

*M3: Once Shenzhen Bay Hotel was built, I went there for two days.*

*F2: The scenery was beautiful so that I went there...*

Apart from sightseeing, broadening horizon was a reason for travel. M3 traveled with his children to broaden horizon while M6 wanted to understand more about local people's lives in Canada.

*M3: ... Bring them (my children) along to broaden horizon... After my children were born, I like going everywhere with them but the itineraries were short. Zhong Shan, Shen Zhen, Zhu Hai... Usually went to those places. Those trips lasted for two days only. It was because I did not have so much time. I had to work... For children, they didn't have so much time.*

*M6: ... I had a purpose. First, to see people's lives in Canada and social situation... which can be very broad as you know... Second, to see the environment of the country not just the "scenery".*

Satisfying curiosity was a reason to travel. As F2 mentioned she had been traveling since she was young. She was interested in visiting rural areas because they liked to visit those places where they had been to before.

*F2: ... In the past, I have a group of friends, about eight to ten... We have been to some rural areas in the past... Both of us were interested in it. We had not been there so we went to see it.*

Some also mentioned attending family activities and visiting relatives as their purposes for travel. M3 and M6 traveled to see their family members or relatives in the destinations.

*M3: ...It was because my son studied in Australia so that I went there for several times.*

*M3: ...On the other hand, visiting my relatives because my brother is living there.*

*M6: I also went to Canada to visit my sister because my sister lived there. So I went there and lived for more than four months.*

A member in Pattern II, M3 mentioned application for migration as a reason for travel.

*M3: It was because I tried to go there to see if it was possible to migrate there.*

Only members in Pattern II mentioned treasuring opportunities of travel to be one of their purposes for travel. They shared similar views that every opportunity for travel was precious and therefore one should take the travel opportunities. M3 foresaw that he might not be able to afford travel in the future because his health might decline as one ages. M5 thought that he would have felt regretful if he had not grasped the chance to travel. M6 regarded the world as a place worth exploring and therefore one ought to take the chance to travel the world.

*M3: At my age, I think those who can travel should travel because I found that some of my friends had many difficulties in walking... We might not be able to go (in the future) if we do not go when we have the opportunity. Haha...*

*M5: At that time, I think that... If I had not gone... had not traveled for once, I would feel sorry. So I went as far as I could.*

*M6: The world is so diversified in nature. It's worth exploring. As God created such a meaningful world and let us to manage it... and we can also appreciate it. It's really worth seeing around. On one hand, get the grace from God. On the other hand, one can understand the grand God.*

Some respondents regarded the fact that they traveled in the past as a result of their “personality”. M3 went to travel around during weekend when he stayed in Holland for applying for migration. He attributed his previous travel behavior to his “active personality”. F2 also explained her visit to rural areas by her “indomitable” personality.

*L: That means you wanted to apply for migration at that time but you also went there to be a tourist to look around...*

*M3: That's true. It was because I have a very active personality. Every Sunday, I went to everywhere... Due to my personality... Maybe I'm outgoing. I like going everywhere. Then whenever time and opportunity were available, my children went along with me to play.*

*F2: ... I also went to those more ancient places... Where I went to was the inner part of Yunnan called... Daughters' country (Nu Er Guo). It was a very old place...you did not have a place for bath. That's because of my indomitable personality... Not every older person is indomitable like me, right?*

### ***Pattern III***

A main purpose of travel for Pattern III members included visiting relatives (mainly adult children and siblings) or attending familial activities such as graduation ceremonies and weddings. There were several purposes mentioned by Pattern III members but meeting family members was identified as the main one. To M9, travel was just for visiting relatives instead of sightseeing. M8 thought that he traveled to Australia only because of the graduation ceremony of his daughter.

*M9: My travel was not for sightseeing... just visiting relatives... no sightseeing at all...For a (family) reunion. We hadn't seen each other for a long time...*

*M8: Actually, I didn't want to go to Australia at all... but it was because of the graduation ceremony of my daughter... (It's) necessary for me to go...*

Rather than satisfying certain personal desires, some members mentioned that their trips were initiated at the request of other people. M7 mentioned that he went to travel because of the invitation of his sibling except for those trips organized by the church. He further mentioned that the duration of visit was not long because of the desire to going back to Hong Kong.

*M7: I went to Canada on a self-guided tour... My sister very seriously told me to stay there so that I stayed there...My brother and my sister asked me to migrate to Canada and Australia. But I was not willing to do so. I would like to go back to Hong Kong at the end...*

*M7: I decided by myself... and there was an organized tour to Vietnam... It was organized by the church. People from the church and the priest went together...*

Although perceiving not a main purpose of travel, M7 took the chance to understand more about destination. Sightseeing was a purpose for travel but their principal purpose was not to “investigate the destinations”. “Investigation”, exploring the destinations deeply was not particularly attractive to M7. He thought that history could not be changed even though he had been able to explore more about it.

*M7: ...and, by the way, I went there to see the scenery around where they lived ...My travel was sightseeing in nature. Just see those scenic places. I didn't investigate other things at all. I don't care much about its history. That was unchangeable... when I arrived at there... I felt pretty good... (I) went around and see...*

*L: Would you research the history after visiting those places?*

*M7: ... Even after knowing the history... it was unchangeable... Travel is just for sightseeing... seeing those places... That means it aims at enjoying only.*

#### ***Pattern IV***

Fulfilling social expectations was a main reason for Pattern IV members to travel. Following the requests of their children, friends or relatives, F14, F7, and F8 decided to travel. They were asked by their children, friends, and her husband's friends respectively.

*F14: My children asked me to go. Otherwise, I would not travel alone.*

*F7: My friends said that they would go to somewhere and asked me if I would go or not. Then I said I would go, so that I went with them.*

*F8: After I retired, some friends of my husband asked me, “There will be a trip of 3 or 4 days. Would you like to go?” Then, I went with them... Usually, I traveled with them usually. If nobody goes with me, I won’t go.*

Satisfying previous desires initiated them to travel. As F8 and M4 said that they wanted to travel because they were unable to travel due to time constraint before retirement.

*F8: ... No time... because I didn’t have holidays on common holidays... I had holidays on Wednesdays...After retirement ... I followed them (her husband’s friends) to go...That’s because I had never traveled before. Sometimes, I wanted to go but nobody go with me... Later, those friend and center... not center... they don’t have it... center would not take older persons to go to the places such far away...*

*M4: When I was young, my previous work was so busy. In one year, I had only three or four days of holidays. The work I do was... On Sundays, I had to work. I worked in construction sites... On Sunday, I had to work late. So when other people had holidays, I didn’t have holidays. Now, I am retired... I just go to travel...*

## B) Preparation prior to travel

Regarding to preparation for travel, respondents showed differences in perceived importance of preparation, sources of travel information and amount of resources consumed.

### ***Pattern I***

Pattern I members further stressed the importance of preparing for the trips prior to departure. M2 mentioned preparation was essential for a safe and satisfying

trip. M2 regarded preparation prior to travel was important since collecting information about the destinations allowed him to avoid places with political danger or natural disasters which could affect his personal safety, to prevent experiencing disappointment, to prevent being cheated in travel and to reduce his family's worries about his safety, F1 also considered that preparation as very important because it let her know about the destinations so that she could choose to visit the most wonderful parts.

*M2: We also pay attention to current issues because we don't want to go to the countries where there is political danger... To travel anywhere, it is necessary to do certain amount of preparation. Otherwise, you will be very disappointed. Also, you will get more from the trip if you were well prepared. At least you know some travel agencies. You won't be cheated even though they wanted to do so. Right?*

*F1: It is necessary. It is a must to do preparation...If we have to go to ... a certain place, it is necessary to understand the situation and to see that place. Since it is the first time to travel, it is essential to find out the most wonderful thing, right? That is something I want to go. This job has to be done first.*

Preparation also included letting family members know the decisions of travel. M2 mentioned that it was important to do so because his family members were concerned about them and would worry about them if they did not know about their decisions.

*M2: These kinds of our trips must be discussed among our family members. No matter where you're going to, we will let our family know before we depart...As we have said, for older people who travel, family members... worry about us very much and are very concerned about us.*

They prepared by their trips by collecting travel information by themselves. They obtained the travel information from different sources of research such as

personal knowledge, self-guide tour books, the Internet, newspapers, travel agencies, and informants such as their friends and local people. F1 bought a tour guidebook when she went to Europe. M2 discussed with his wife and made travel decisions and regarded the Internet as a helpful tool for preparation.

*F1: Like us, we went to... For going to Europe, we bought a tour guidebook of Europe. Other than that, some told you how to "self-help".*

*M2: ... About how to arrange the itinerary, usually my wife and I discussed it together.*

*M1: I would discuss with my wife... because she knew more about which hotels are better... she has some friends who often travel... A few of them worked in the travel agents in the past... so they knew more about these things.*

*M2: Now, when we go to travel, I think that surfing the net is very important. Surfing the net is a method through which you can know where you want to go in advance. After searching for information, and based on our common sense, we would know... the freshness of the air there, living standard, etc. At least we would know much or less about these things.*

*M2: Usually, I do some planning before starting my trips. I don't decide to travel just because of learning about it from the newspaper. Usually I prepare for it. I would only select those package tours in which the types of itinerary matched their own preferences.*

The travel information of Pattern I members also came from travel agencies. If they found that they were interested in the itinerary of the tour packages, they would consider participating in them. Otherwise, they would rather not travel or select another ways to travel. For example, M2 would judge whether a package tour was desirable or not by considering its itinerary rather than the price only. If none of the travel options satisfied his criteria, he would rather give up the idea to travel and wait until another package tour which satisfies his criteria was desirable.

*M2: Actually, I'm not saying that we do not join package tours but we would not hurry to make a decision when we join a tour package. We would compare different tour packages. There are many tours going to the same destinations at the same time. If we join a tour package, we must not make a choice just*

*because of cheapness.*

*M1: ... I would look at the scenery spots listed in the brochure... For example, I went to the Great Wall in Beijing. There are many sections. I went to a section called "Water gate" because it has not been renewed... It was raw and I am interested in traditional things... Another section was... renewed. How could you see it (the original one)?*

*M2: ...And we're concerned about the route very much. Most importantly, the route does not involve some things that let us feel bored. We would not join those.*

*M2: ... If the information provided by the travel agencies does not satisfy our requirements, then we will not join them. Or if every travel agency is like that, then I would forget it and find another place or wait for another opportunity to go to those places we want to go and fulfill our requirements at the same time.*

Pattern I members spent more resources on searching for travel information.

M2 perceived that a lot of free time allowed him to do a lot of preparation before departure. To make his trip a "deluxe one", he spent more time on finding information related to the destinations in different aspects and the tour packages so that it assisted him to make travel decisions. Moreover, he considered preparation as "spiritual travel". Time spent on preparation was deemed worthy and the duration of preparation was sometimes longer than that of stay in the destinations.

*M2: Before I got on the ship, for I knew that I would like to go to the "Panama River", I surfed the Internet for information about the history, economy, commerce and other aspects related to Panama Canal. Then I went to every place in Southern America. I obtained some understanding before the trip in order to make it more fruitful. I could do this because I have a lot of time.*

*M2: ...Sometimes the time spent on preparing for the trips may be longer than the travel period. For example, for a one-week trip, I might spend more than ten days, a month or several months on collecting information before the trip. It's because we think that there are two types of trips... One is travel on a piece*

*of paper through books and computer or spiritual travel...*

## ***Pattern II***

Members in Pattern II did not spend many resources on preparation for their trips before departure. They spent less time on searching travel information to prepare for their trips. M3 made the decision to travel in a short time and generally did not find information about the destinations for most of his trips except one in which he wanted to visit his relatives at the destination.

*M3: No. The idea just came out at that time. I had time or it was convenient.*

*M3: I didn't find detailed information. Not at all. Haha...except that time to Hua Dong because I passed there to visit my relatives.*

The sources of travel information were less diversified for Pattern II members. They mainly based their decisions on information provided by travel agencies and their relatives in the destinations. M6, for example, got the travel information from the tour guide. M3 spent less time on preparation for his trips by joining package tours instead of self-guided tours. He regarded preparing for travel by oneself as time-consuming and further explained it by the convenience of joining package tours to travel.

*M6: The tour guide said we were now going to see the elephants. We went there and got to know that the elephants were so cute...*

*M3: ... Travel by joining package tour is more convenient for arranging transportation, scenery spots, and other aspects. If you travel by yourself, it would be much more troublesome... You had to find vehicles everywhere. It's difficult to control on the one hand. On the other hand, finding vehicles*

*everywhere is time-consuming since you aren't very familiar with them.*

Sources of travel information also came from adult children or local relatives. F6 relied on her daughter to make decisions. The relatives of M6 who lived in the destinations acted as their tour guides. They did not spend time to collect travel information by themselves and would make travel decisions such as selecting destinations based on the information provided by their relatives.

*F6: If they did not go with me, I didn't know how to go... They did ask me, "Mom, Where do you want to go? Japan is not suitable for you, Mom.' ... (I had) no opinion. You (My daughter) may go to anywhere you want... and suggest what places are suitable for me...*

*M6: ... because my sister can drive and she told me what the places were like... After she told me that, I would say, "How about going there?" And I decided where to go. Then my sister drove me there and I observed it directly. Certainly, if I don't understand something, my sister would explain it... as she had been living there for more than forty years.*

### ***Pattern III***

The sources of travel information principally came from travel companions, travel agencies, and social organizations. Travel decisions were either made by acquaintances or partly by themselves via discussion with their travel companions. M7 depended on his brother, who traveled with him, for travel information for designing their itinerary. M8 said the preparation of his previous trips was mainly based on organizations including the church, a trade union, and travel agencies.

*M7: I don't have the experience. At that time, my brother chose things for me and he also traveled with me.*

*L: And he would ask you... what you are interested in...*

*M7: Certainly.*

*M7: He (my brother) searched for all the information through the computer... where to go, where to walk, and everything... the information was also very comprehensive... and then we followed the printout of the places...*

*M8: I traveled to Mainland China by joining a tour organized by the trade union.*

M7 explained the choice of self-guided tours by different pace of itinerary and concern of health status of his travel companion. Although M7 noticed disadvantages of self-guided tours, he still regarded self-guided tours as a better option for them. He thought that the pace of itinerary of package tours was undesirable because it would be demanding to brother who was older than M7.

*M7: It was not like, as the old saying goes, "rushing ducks"... I cannot take care of myself... Young people are fast and you are slow. I would affect other people.*

*M7: At the same time, travel by road transport is uncomfortable... My brother told me (about that)... I was old and he was even older than me... it's not good to be like rushing ducks.*

M7 went to fewer places and perceived he had missed some desirable places as a result of choosing to travel on self-guided tours.

*M7: ...We could go anywhere we like to go. So, we did not go to a lot of places...There were advantages and disadvantages (of traveling by self-guided tours). The good thing is that one need not be rush. Even though I'm fine but my brother might not be able to do so. The bad thing is that we didn't know the good places to visit.*

## ***Pattern IV***

Among the members of Pattern IV, sources of travel information included travel agencies, comments of other people and personal knowledge. F7 made travel decisions based on her friends' comments and prices of package tours. M4 explained his participation in package tours by his language barrier and safety concern of his family. He further pointed out that having travel companions were better because they could take care of each other during the trips. Some respondents also consider package tour is a better choice due to safety concern.

*F7: I must ask other people before travel. "What package tours did you participate in?" Which were better? If they told me those better ones, I would join those tours then.*

*F7: ... Those cheaper ones must probably be not so good.*

*L: Why did you travel Mainland China by package tours?*

*M4: ... I don't know Mandarin... If I go by package tours, my children would be less worried... The problem would be great if I joined "outside"<sup>14</sup> tours... (because) most of them (the participants) were strangers... My children would feel worried (about me)... (My children would tell me) "Don't go to travel with strangers!"*

*M4: Both of us can take care for each other. (His friends and R44 himself)*

*F14: ... I felt more secure to travel by joining package tours.*

They did not spend a lot of resources on preparation for their trips. Even those who traveled by self-guided tours, they spent less time on finding travel information before departure. F11 who traveled by self-guided tours with her friends did not plan

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<sup>14</sup> "Outside" tours means the tours in which most of the participants were strangers to the respondents. In other words, the respondents knew all the participants of the tours they participated in.

their itinerary in detail. She mentioned that they made decisions of accommodation after arriving at the destinations.

*L: Did you find where to go and what to see at that time or before your departure...?*

*F11: No! We decided after we arrived at the destinations. We saw, walked, and ate at the same time...*

### C) Participation in activities

For participation in activities, the four patterns of travel behavior showed differences in the pace of itinerary, types of transportation, nature of activities, and intensity of participation.

#### ***Pattern I***

Pattern I members went sightseeing in particular places. M2 mentioned that he would only be curious about the cultures which were available in certain places. He said that he was only interested in those places where he could see something which give him pleasant feelings. M2 would visit in those places where there were “pleasant” things and no “unpleasant” things. To M2, places such as mass killing and “capital inn” gave him unpleasant feelings while beautiful scenery, fresh air, and unique cultures gave him pleasant feelings.

*M2: But what I mean by curiosity, we don't visit those places which impose an undesirable effect on our sight and perception... We would not go to some dirty places. We must not go (there), never consider (them)... I won't see some places where there were mass killing. We won't see those things. Beautiful scenery, fresh air, and unique cultures make us curious. Those, which can be appreciated, are one of our objects...*

*M2: ... I definitely would not stay in those called capital inn<sup>15</sup>... Capital inn is like a small drawer. It is very ugly. There is a bed inside and a light...*

Pattern I members avoided places where the environment was similar to that in Hong Kong. M2 avoided going to places where there were many Hong Kong people. He would prefer to go to see something which could not be seen in Hong Kong. He went to particular part of Japan so as to appreciate the natural scenery only available in Japan.

*M2: ... We definitely don't select... As I'm from Hong Kong and living in Hong Kong, I definitely won't go to the place where there are many Hong Kong people...I must go to see something which cannot be seen in Hong Kong...*

Pattern I members participated in certain activities which were perceived only to be available in the destinations. F1 did not intentionally try French cuisine when she visited France but she particularly went to Las Vegas to try French cuisine after being told the cuisine was characterized by its traditional style. M2 expressed his interest in seeing unique natural scenery of Japan rather than shopping.

*F1: We usually choose those with characteristics... Like in France, we didn't eat... intentionally went to eat French cuisine. We didn't because... we had to look at other things so we won't be able to... We went to Las Vegas. There was a France really created for travelers. The service was really good... We intentionally went there to eat. The entire format was according to that of France...*

*M2: ... We go to Japan perhaps to appreciate the snowy scenery... Perhaps I went to a certain city to see red leaves, natural scenery, and beach... and appreciate the special gardening of Japan.*

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<sup>15</sup> The meaning of "capital inn" is not clear to the researcher. Based on the explanation of the respondent, "capital inn" is an undesirable accommodation for travel.

Pattern I members took different kinds of vehicles for transportation and considered that a ferry was a better option among other available choices. They would select to take those vehicles or modes which they perceived to be comfortable. M2 mentioned that taking cruise ships or deluxe trains gave him pleasurable feelings so he chose to take those modes in his trips. F1 also expressed the view that she felt better to take a ferry to travel.

*M2: ... Why do we like travel by cruise ships? Because we felt physically and mentally comfortable... It gives us a fresh sense...*

*F1:... And in another trip... it was better as we took a ferry. How long was the trip by ferry? ... We took the airplane to Singapore and then took a ferry to California and then ... to the seashore of Southern Asia. We stayed in every place for a while at that seashore...After visiting there, we went back to the ferry. It should not be very hard if one traveled like this. Therefore, this is better... We took a rest once going on a ferry. It's better as we didn't have to walk around to find anything...*

Pattern I members generally took a less “hurried” itinerary. M2 chose to participate in package tours which were less “hurried” and avoided to travel like people who like to do shopping in Japan in a hurried way.

*M2: And I also participated in those trips which were not hurried. This is my travel style after retirement... Nowadays, many young people go to Japan. What do they do? They go there for shopping and then rush back. They travel in a hurry, just like going to a wet market. I definitely don't do that. But it doesn't mean that we don't go to Japan. I also go to Japan.*

*F1: Yes! It was better to go to a place directly. Like... that time (I traveled) to Japan... (We needed not) move to another hotel within three days... Going to Japan that time was more comfortable.*

Shopping was not attractive to Pattern I members. They did not regard

shopping as an important activity for them. M1 bought some food according to the advice of the tour guide. He found that it tasted not as good as the tour guide described. However, he regarded it was not an important thing for travel. F1 bought some souvenirs according to the tour guides' advice without her own preferences. She further explained that it was worth spending that amount of money for maintaining her emotional status.

*M1: Buying souvenirs is not very important. Certainly, I bought some preserved pork when I went to Jing Hua... I bought some... the tour guide told us that certain brands were better and we bought them accordingly... (Later I found that) It was not as good as he said. Those in Hong Kong is even better!... It doesn't matter for travel...*

*F1: ... Let think about it... You don't have to spend a lot but people earn the money for a living. Why let it affect my emotion? ... Every time I travel, I would... buy whatever they promoted. Moreover, they're relatively not expensive...I don't like to be disappointed. Those only cost a few hundred dollars. If I'm happy with it, it's fine. If I don't like them, just throw them away.*

She spent more resources in order to make a deeper exploration of the destinations. For example, F1 extended her trip and revisited a certain place after she knew that package tours did not allow her to do so. She further pointed out that she would not only “observe” during the trips but also “investigate” the aspect interesting to her.

*F1: ... Package tours visited it in a glancing way. Therefore, we stayed alone. We had traveled The Louvre<sup>16</sup> once before.*

*L: Another time?*

*F1: Another time, because we wanted to see it in detail...*

*F1: I concentrated on the artistic aspect. This is something with a very strong artistic sense... Besides observation, I also... investigate! Haha...*

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<sup>16</sup> The Louvre is a famous art gallery/ museum in Paris.

Follow-up questions about language barriers were asked in order to understand if there they perceived any such barriers when they traveled by self-guided tours. F1 thought they were capable to travel foreign countries and able to communicate with the local people. F1 agreed that English was necessary to overcome language barriers in non-English dominant places. However, one could also travel in foreign countries with just basic level of English and map reading skills. She illustrated this with her own experience. Without knowledge of Japanese and French, F1 could use gestures for communication when she visited Japan and France.

*F1: ...the places where we traveled were mainly English-dominant. Visiting English-dominant countries, I am basically okay (with it). I have no problem in listening to English so there is not a problem regarding to language.*

*F1: We don't know Japanese. However, referring to the present situation... because hey have to trade with foreigners...Japanese don't like speaking English ...they are very conservative. We found that Japanese and French are also like that but they are so friendly ... no matter they are able or not to speak English or willing to speak English. But you have to... like asking for a direction to the place I want to go, you can make some gestures. It's also fine for communication. I noticed about that... Certainly, it's not good to do so (visiting those places) if you don't know any foreign languages. If someone has a map and can communicate in English, they can communicate with you even in non English-dominant places.*

## ***Pattern II***

They participated in different kinds of activities, especially which they had not tried before. F6 said one-arm bandit was unfamiliar and interesting to her so she tried it. M3 and F6 tried different kinds of food.

*L: Gambling may not be attractive to you...*

*F6: I don't know those things... but I just go there to see and walk around... I tried a one-arm bandit before. (I) inserted several coins and pressed the button and several coins came out... Ha... I don't like gambling at all... but I just try it... those things not yet seen before!*

*F2: Yes, I like trying new things.*

*L: Then, if the activities are more... such as those of Disneyland, some mechanical activities or something like that. Would you like to have a try?*

*F2: I also tried it...*

*F6: Roaster Coaster... I wasn't afraid... The Observatory Tower in Macau is quite good... If looking downward, one can see the sea...*

*M3: Eating is also quite good...Eating the special food there. Trying anything.*

Some members in Pattern II were especially interested in certain activities in travel. Taking pictures was a meaningful activity in travel to M6, M3, and F2.

*M6: For any travel, I must bring a camera...*

*M3: I'm relatively interested in taking pictures because it reserves a lot of memories. I can recall the situation at that time. If there is not a picture, recalling is much more difficult.*

*F2: ... Just want to take some pictures for seeing them again in detail...*

Although taking pictures were not an activity included in the package tours, it was an important activity for some respondents in this group. M6 and M5 would like to take their cameras with them and had preferences for certain kinds of pictures taken in the trips. They took different kinds of pictures. Apart from the “typical pictures”, they had their own preferences of pictures taken in the trips.

*M5: If I take pictures, I must not take postcard-like pictures because I would never take those pictures as well as they (professional photographers) can, right? I would not take a picture of a tower more beautiful than they do.*

*Although I did take pictures but I like taking those pictures like... maybe a street or even a city or a street in a village, with a man in the middle. It doesn't matter there are one or two people but its proportion to the whole picture is very small. That means it is not very great... That is the kind of pictures I like most... I might take pictures secretly...*

*M6: The pictures taken depend on the personal interest. I took... some pictures of scenic spots... but what particularly interesting to me were those with characteristics, for example... the elephant performance...*

During the trip, some members found some places which they did not regard as scenic spots. M5, for instance, planned the itinerary prior to departure. However, he did not visit all the places according to the planned itinerary. He further pointed out that he would visit both “scenic spots” and “non- scenic spots” but he was particularly interested in less “developed” places because he thought he could learn more about the characteristics of local people. He also enjoyed wandering in the destinations.

*M5: Theoretically, there was one... I knew the itinerary in general...I might not follow it practically ...I did not go to the places as planned, for example, I went to Beijing and Inner Mongolia but finally I did not go there.*

*M5: ... I would go to those popular scenic spots... but I also like going to small streets and alley because only in those places one can feel the characteristics of local people...Not so artificial. Use Macao as an example. Where I like is not “Tai Sam Ba”. What I like most is visiting those old districts not yet developed. I would not go to shopping districts. That means those places with the life styles in several decades ago but not those filled with modern styles... Usually, they're not places chosen by tourists.*

*M5: ... I would walk slowing in those places and then find a raw restaurant for a sit. Rest for a while and walk again...*

To M6, observation was a main component of his trips. He said that he would

use observation and ask questions related to the destinations. He tried to understand the destinations by observation and even had contact with the local people. M6 said that he asked a local people about his salary in order to understand the differences between the destinations and his living place. He talked about the tax system as one of the characteristics he found from the social infrastructure in Canada.

*M6: The main method is by direct observation...*

*M6: I asked the Second chef in person... For the main chef is the highest position, he was the second one. The post isn't low at all... His final salary is \$12, 000 Hong Kong dollars but for my son who also works as a second chef has a salary of 15, 000... I have a conclusion that... not many people work so hard in Canada... that... Canada "nourishes the lazy" ...*

Shopping was not an important activity to them.

*M5: ... The most important things must not be shopping! Shopping is at the lowest rank. If there is a top-ten ranking, shopping should not be ranked in the top ten. Although I would buy souvenirs, it is not a very important thing.*

*F6: I rarely buy things. I don't like shopping. For something which I haven't seen before, sometimes, I would buy some if I like.*

*M3: Shopping is relatively less.*

*F2: ...Shopping isn't important ...*

Eating and places for staying were not important for many members in Pattern II. F6 did not demand for food and tried different kinds of food at the destinations. M5 regarded eating was not important for travel. F2 considered that she had no problem for food and did not feel that the food did not match her taste.

*L: Would you like different food of other places?*

*F6: I also like it. Eating buffet is quite good... When I ate buffet, I 'm not picky and I ate everything.*

*M5: The content of the trip... Having two meals... If I wanted to have two meals... why do I have to go there to have two meals? Four hours would be spent on that transportation. That means it only remains several hours. Why do I have to go to so far away to eat?*

*F2: Eating is not a problem...*

*F2: I don't have problems of eating.*

*L: That means you won't feel that it did not match your taste.*

*F2: I won't.*

*L: I see. As you said you like special thing. You don't mind the food. How about the places for staying? Would you mind?*

*F2: It doesn't matter.*

Some members in Pattern II considered that taking different kinds of vehicles was part of their journey. They did not feel uncomfortable with the types of vehicle used for travel. F2 neither felt uncomfortable nor troublesome even though she took a long flight to reach the destinations. F6 even said she did not have jetlag even though she went to farther away places. M3 traveled around by train although he was not familiar with the rail system in Holland. He thought that would not cause a problem due to his ability to identify the directions.

*L: That means... you won't feel uncomfortable even the flight lasted as long as more than ten hours...*

*F2: I didn't feel troublesome or hard... I'm rather indomitable...*

*F6: I don't feel dizzy to travel by plane. I'm not adverse to take a plane.*

*L: Not feeling dizzy on a plane? How about jetlag?*

*F6: Not at all... After arriving there, I didn't feel sleepy at all!*

*M3: Yes, many questions are not answerable to me... Like the trains in Holland, separation is possible at any time. There are many routes for some trains.*

*Perhaps (that's because) I studied Civil Engineering, I'm relatively confident... regarding to identifying the directions.*

*L: Sense of direction?*

*M3: Sense of direction. (When) I passed by a place, I would particularly pay attention to the nearby objects. Therefore, I can usually recognize (them) if we I go there once.*

A member in this pattern, M5, mentioned a more important thing regarding to transportation mode. M5 thought the important thing was the process in which he would not feel bored. He pointed out that the duration of transportation would not cause problems to him. However, he considered that taking a vehicle which was the lack of “interesting thing to look at” was undesirable to him. M5 regarded a 24-hour journey as acceptable if he could meet new people, while a 4-hour bus was undesirable as if he could see “nothing”. By contrast, taking a vehicle from which no desirable scenery could be seen and in which no people he could meet would make him bored.

*M5: ... Not because of tiredness but... Traveling by bus for long... That is to say you don't have anything to look at. On the bus, unless you traveled by those trains like the Siberian trains in Europe... You have something to look at. You would be able to look at different people and events. Those one-day trips going to Guangdong... Who (I would) look at? Who could you look at in a bus? What scenery could you look at? Those two hours would be very boring! You almost want to die so I don't like it. That is to say... the length of the trip... Not because I think that those two hours were long but the four hours would be boring.*

Furthermore, M5 mentioned that the length of his trip depended on some situational factors such as availability of tickets or his emotional status at that time. His major consideration was not the length of a trip or destinations to be visited. Rather, he regarded it is important to have a sense of relaxation and not to feel bored during the trips.

*M5: More flexible... It was not necessary to force myself to be so nervous. That's because I considered travel is a relaxing thing but not a hard thing.*

*M5: The length of a trip is not the cause of a boring trip. Rather... I considered that it is long as I feel it boring. If I considered that it is long but not boring, I can accept it.*

*M5: ... I would think about how long to stay after arriving there. Also, there were problems of transportation. Sometimes the tickets were not available because China was not that open at that time. So, it would depend on the situation and the emotion at that time... whether I would stay longer or not...*

### ***Pattern III***

They did participate in all kinds of activities in the trips without mentioning come certain activities being more important to them. M7 participated in different activities including religious activities, taking pictures, sightseeing, and trying different food. M8 took a few pictures and visited museums and art gallery during the trips.

*M7: That means a “worshiping pilgrimage” with brothers in the church. We went to Vietnam on a pilgrimage...*

*L: Did you take pictures?*

*M7: Sure. There were special activities in travel... seeing the old buildings and special things... historical things... not particular at all.*

*M7: I also like eating... but not in a deluxe way... the level of food was average... and I'm not picky either. I eat everything. Especially at my age, I can't eat too much meat, oily food or things like that. I also control my diet sometimes ... Excellent food isn't necessary. Even if it's provided, it's not necessary.*

*M8: (I) visited museums... an art gallery with my daughter... taking a few pictures...In fact, I don't like taking pictures at all...*

#### ***Pattern IV***

Pattern IV members participated in all activities in general. They were not averse to certain kinds of activities. F16 said she went to different places with her relatives and they mainly focused on sightseeing and eating.

*F16: To everywhere... to Disneyland... I followed my relatives to go there... I have many relatives... in San Francisco...*

*F16: ... (We) usually go viewing natural scenery and eating... some cuisines... which I don't know what they're called... are very delicious...On the observatory tower in Macau, (I) saw the whole view of Macau...*

Pattern IV members did not have certain requirements with respect to catering. F7 and F16 ate what was provided for them during travel. F7 expressed that she liked trying any kinds of food. F16 mentioned that she did not have much consideration eating particular types of food during travel. Moreover, she considered that demand for food was “not necessary” to her because she was a vegetarian.

*F16: I also like buffet a lot... because I'm not picky...*

*F7: I haven't considered eating special things. In addition, I now eat... vegetables in recent years. I don't think about what to eat at all.*

*L: I see. That means you do not require the vegetables to be delicious. The most important thing is...*

*F7: No. But I just think that it is not necessary to demand so much with regard to travel.*

Pattern IV members did some shopping and they purchased mainly for friends

or relatives as souvenirs. M4 engaged in shopping and sometimes purchased some goods for his acquaintances and his adult children.

*F16: I rarely go shopping... I don't like shopping... sometimes, I bought those things which I had not seen before... In Macau, I bought some almond biscuits and egg rolls as souvenirs...*

*M4: More or less... If they (the goods) are interesting or for someone as souvenirs... Knowing what my children like, (I) will buy some...*

F11 found a place for accommodation on the way. She did not find a place in particular for staying.

*F11: Those hotels were not so good. They were just somewhere to stay.*

*L: I see. That means you won't demand high-class services.*

*F11: We won't demand that much.*

#### D) Considerations for future travel

Regarding to considerations for future travel, respondents showed differences in considerations about travel purpose, destinations, transport modes, nature of activities, and availability of travel companions.

#### ***Pattern I***

Members in Pattern I had plans regarding to their future travel. They mentioned their intention to travel and also their purpose of travel such as visiting certain destinations and participating in certain activities in the destinations. M2 and F1 wanted to revisit Tahiti and Hawaii respectively to see the alterations of the places.

*M2: Yes. In the near future, I will go to travel. That place... Now is 2006. The last time I went there is in 1973. I may go there this year or in the beginning of the next year. I worked in Tahiti in the South Pacific Ocean in 1973,74. Now, I want to go there again. Last time it was in 1973. That means 33 years ago. Now, I want to go there again.*

*F1: ... Another reason is that we went to Hawaii several years ago and I still want to see it again.*

F1 mentioned that she would be able to participate in a cultural activity being held in May every year in Blackpool.

*F1: ... I also want to go to the United Kingdom. I wanted to look at that... In May Latin dance held every year. The standard is very high. In May every year, someone who wins the first ten positions is regarded as very good. I want to see the competition of such a high standard.*

She further explained why she was interested in this cultural activity.

*F1: ... I have been practicing Latin dance over the years. I have just passed the examination as a middle-level professional instructor. Now, I'm preparing for an examination as a high-level professional instructor... Then, regarding what I'm learning... Now, I have been participating in competitions...*

F1 also wanted to go to Las Vegas even though she had been visited there before. She indicated that she would like to try gambling after she learnt that it was a place famous for casinos.

*F1: I also wanted to go to Las Vegas again, haha...*

*L: To eat French cuisine?*

*F1: No no. I want to see it. Last time I went there... For one thing, we didn't know how to play that kind of... gambling... because we're not interested in it. I didn't even try playing a slot machine... Other people were also amazed that we didn't go to casino (in Las Vegas)... Haha... Many people also went there...it was a must to try the poker. We didn't even go there at all. Yes, I want to try it.*

*Just try it. Let's try a slot machine! I think that... Last time we went to Macau, we tried and lost several hundred dollars... Now, if I go to Las Vegas... how about spending several hundreds on gambling? If I lost, I will also be able to try it.*

A member in Pattern I, F1, further pointed out she was able to travel without financial constraints but it did not implied that she would be likely to travel. She would only spend money on “valuable” things. She would allocate her money carefully and would not spend on those things which are not “valuable” to her.

*F1:... As... we spend money... not recklessly!*

F1: We spent on those “valuable” things. For those things which are not “valuable”...I'm very frugal. Haha... I'm so frugal but we have no problem from economic perspectives. We don't have problem... We travel but we do not squander.

Being asked how to deal with a free gift trip, Pattern I members in general indicated that they would traveled with their spouses. They also specify that they would only travel with their spouses.

*M2: I would travel with my wife if both of us were free. If not, I would give it to my relatives or friends.*

*F1: ... It must be a gift for two people. It is meaningless to go travel alone.*

## ***Pattern II***

Being given a free trip as a gift, Pattern II members made use of it in general without raising other considerations.

*M3: Certainly I would go myself. Ha!...*

Regarding to future travel, some members in Pattern II showed their thoughts regarding purposes. Both visiting new places and revisiting the old ones were desirable for F6 as she regarded there would be changes even after a short time. RM3 said he would choose to visit his relatives living in America and Canada and M6 desired to visit Suhang to see the environment he had not been to previously.

*F6: Sometimes... revisiting there is also good... Things are different every year.*

*L: Would you like to go to places where you haven't been to?*

*F6: Of course.*

*F6: For the next time... they said they wanted to go with me when they're back... They said they would go to... (I) don't know which hotel is newly built... They'll go there with me.*

*M3: For now, I would choose to visit the region of America and Canada.*

*L: Why?*

*M3: There are relatives.*

*M5: Maybe I would go to Suhang region because I have not been to there before. It's because the place was described widely among poets... to feel... they ways poets used for describing it and to observe the environment practically. For I have visited some of the other areas in Mainland China already.*

They wanted to try new vehicles as well. M3 would like to try taking a ferry to travel as he had not traveled by ferry before.

*M3: The best is taking a ferry. I had no opportunity to take a ferry... It is common to take a plane...*

M6 preferred to travel by less expenditure. He pointed out that financial status constrained him to travel farther places.

*M6: It is more suitable for short-term trips as I don't want to cause great*

*burden to my sons. As I mentioned before, my saving was not much after I bought the house. If I go to a long trip, I would have to ask my sons for money. I don't want to do that.*

*L: So, for short trips, you would think that you can afford it, right?*

*M6: Right.*

### ***Pattern III***

Some members in Pattern III did not have plans for travel. For those who had plans for travel, they had a specific purpose of travel and sometimes other considerations of their future trips such as time and other activities. As some respondents said, their purpose of travel was to meet family members and joining family activities. M9 said he would go on a trip for attending wedding of his daughter but he did not have any current plans for it. Although his might not stay in Australia for a long time, M8 desired to revisit Australia in order to see his daughter.

*M9: Now, I don't have any plan... My daughter is getting married... I'm going to participate in her wedding ceremony. Now, I don't have a lot of plans... (I'm not interested in travel very much.*

*M8: Maybe I will visit Australia again because my daughter is still staying there... It (My trip) would not be long... about one week... (as) I won't adapt to the environment.*

Some said that they would travel by the free gift. They might not go to the free trip due to some possible factors such as time clash with other activities. M7 said that whether he would travel depended on other factors such as no time conflict with other activities. Otherwise, he would rather give it to other people.

*M8: I would use it to travel with my wife... both of us have free time now...*

*M7: Sometimes, it depends on many other things... (such as) time and other*

*things... One may not be able to travel just by saying to travel...*

*M7: ... If I can go, I must go certainly... Maybe something hinders it or conflicts with other things. I would rather give it to other people.*

They did not have a plan for future travel. They were not eager to go to visit particular places. M7 and M8 did not have ideas about the destinations. According to M7's response, it revealed that previous travel experience was the reason for less eagerness to travel. M7 attributed his lack of travel plan of visiting somewhere to his experience of travel.

*M8: Now, I haven't planned anything for travel.*

*L: For destinations, you would not have a preference...*

*M7: No special selection ... At this moment, I can't think of anywhere I would like to go...It's also because I have already traveled before...*

Some respondents revealed their unwillingness to visit certain destinations as they expressed their security concerns about those places. M7 considered that it was unsafe to visit Mainland China because of the perception of poor transportation and medical care services. M8 regarded protecting personal belongings was important for visiting Mainland China.

*M7: Also, up to this moment, I thought... that the Chinese government is not doing a good job with respect to medical care... and security as well... not very generous to people... Many older persons also have the same thoughts... Older persons, due to their age, are more likely to get sick. It's a natural phenomenon. If an emergency happens and they need to go to A & E without money... that would be bad. A life could be lost...*

*M7: ... Going to Mainland China, in my opinion, by plane or bus is relatively dangerous. Needless to say, I've only seen this from the reports... on TV...there are often reports of accidents.*

*M8: If someone goes to Mainland China, one should pay attention to safety.*

*Robbery is common in Mainland China. Handbags... Everything may be robbed!*

Some members were concerned about the duration of the trip.

*M9: Two weeks is too long.*

#### ***Pattern IV***

Members in Pattern IV considered other factors such as availability of travel companions and other activities including family duties and religious activities when they decided to join the free trip. For example, F7 regarded a travel companion as essential for travel because she had vision problems. F11 said she would refuse the gift as she had the responsibility of taking care of her grandchildren and if the time overlapped with that of her religious activities on Sundays.

*F7: If I needed to go alone, I would not go for sure.*

*L: That means it is very important to go with someone.*

*F7: Definitely... my sight is not so good now. I would not dare go alone... Now you give me a gift and let me travel. If I have to go alone, I would rather not go.*

*F11: On Sunday, what do I do? I won't go anywhere. I go to the church for a service on Sundays.*

They did not have plans for future travel. As F11 said, she would wait until she completed her family duties. (i.e. taking care for her grandchildren) F7 said that she was not thinking of traveling in the near future. In addition, she would go to travel if her friends asked her to go.

*F11: (Even I have) a lot of time, I have to look after my grandchildren. I depend on my children for a living. Then, I ... We have to help each other. She works and I have to look after my grandchildren so I ... Well... When my*

*grandchildren grow up, I will also travel...*

*F7: Haha... I don't think about where to go...*

*L: No planning?*

*F7: If people ask me if I will go somewhere sometime, I will say that I will go. You may call me up to go. I don't mind.*

Another consideration of future travel is availability of acquaintances as her travel companions. F11 considered that traveling with acquaintances was better. She thought that she would offend strangers more easily if she traveled with strangers rather than acquaintances. Furthermore, F11 regarded the difficulties during the trips such as getting lost could be overcome by having travel companions.

*F11: ... Going with friends is more pleasurable. If you go with unfamiliar people... it's more difficult to communicate... One has to be careful when talking. Sometimes, I'm afraid that I might offend other people. It won't happen if going with acquaintances. I respect you and you respect me. It doesn't matter.*

*F11: ... We went together. It didn't matter (even though we got lost). We had a map.*

Pattern IV members did not mention specific or desirable destinations and transport modes for future travel. F8 and F14 mentioned that a *long* trip was not desirable and closer places were better options.

*L: If you can choose the destinations, would you choose places nearer or further away?*

*F7: It doesn't matter...*

*L: How about farther places such as North America?*

*F8: Those are not okay. Those take ten days for transportation... Those places were too far away... I won't go those places...*

*F14: Now, my physical ability is not as good as before... (so) it's not good to travel farther places. Traveling closer places is fine.*

## E) Sources of happiness

The respondents gained pleasurable feelings from travel in general. They provided a range of reasons for accounting for their sources of happiness including understanding more about the destinations, enhancing social relationships and gaining a sense of relaxation and refreshment.

### ***Pattern I***

They felt happy when they perceived cultural differences between their living places and the destinations.

*F1: ... When they (Western countries) are compared with ... us... Eastern (countries)..., there are many different styles such as questions, hobbies. It's very interesting. I think it's very interesting... when we were in Paris... (I saw that) coffee shops there were different from in Hong Kong... especially the building blocks on the top were quite interesting...*

The sources of happiness of M2 came from the perceived alterations of a destination or people at different times.

*M1: ... I thought visiting there twice was quite good... if one went there before and after reconstruction... because I could know what it was like in the past (before reconstruction) and at this moment... (It's) a new feeling...*

*M2: ... Visiting a place forty years ago and visiting the same place after forty years... The most unforgettable thing is the changes. Everything is different... Very unforgettable, haha... In the past, we might have a meal in a place at thirty cents but now at three hundred... The difference lies on that. Sometimes, I'm so amazed. Visiting old places is something that makes us very amazed. Oh, things are really different. It's very unforgettable. Or... I had*

*similar feelings with respect to materialistic aspect. How about in the aspect of character? I knew this person in the past. Both of us were young people. We now see each other. We have also become old. So it is a very unforgettable thing.*

*M2: ... I found out the reality of the people there. Hearing about it is not comparable to seeing it. I expected the things to be very cheap but they were so only on the advertisement. In fact, the things were so expensive.*

A member in Pattern I, M1, explained sources of happiness by his interest in understanding more about the history of the destinations.

*M1: ... visiting to the rural places is my interest. Also, (I) could understand more about history... (by) seeing the those old things.*

Escaping from the undesirable environment of Hong Kong was also a source of happiness. F1 enjoyed slower lifestyle of the destinations and pointed out that the lifestyle in Hong Kong was not desirable for her.

*F1: Another thing is that the rhythms of some places are totally different from that of Hong Kong if you go out to travel somewhere now.*

*L: I see. You are saying that the rhythm of life in Hong Kong is too fast...*

*F1: Yes, too fast. It seems that the motivation is very strong too. They finish what they have to do in a while... They go to that place if they have to buy the things. They don't have a sense of enjoying that moment. I'm here at this moment. How can I enjoy it with that of my... They aren't like that...*

Enhanced social relationships were part of F2's happiness from travel. She regarded some activities in the trips was desirable because it brought about social satisfaction. For example, the "atmosphere" of eating French cuisine enhanced her relationship with her husband.

*F2: It requires two hours for eating a French meal...you and we usually don't eat like that but the atmosphere in that place is so romantic letting you enjoy*

*the taste of the food. We also enjoyed it. It's very meaningful... because of the atmosphere in that place. It enhances the relationship among friends, the relationship between a couple...*

## ***Pattern II***

Local natural environment gave the members in Pattern II pleasurable feelings.

F2 and M6 were happy with the weather and the scenery in the destinations.

*F2: The weather was good. Although it was a desert, it wasn't too hot. It was quite cold during winter. It wasn't very cold.*

*M6: ... also the topical climate was attractive to me.*

*M6: Parts of the attractive things were the scenery...*

Understanding more about the destinations and experiencing cultural differences are the sources of happiness. As M5 pointed out that “the reality” of the people and the “characters” of the places were attractive to him. He felt happy when he interacted with the strangers in the destinations and took pictures of the places in the trips. A source of happiness of M3 was from observation through which he could find the differences in construction. After tasting the food in the destinations, M6 and F2 were surprised by the taste of the local food. M6 felt interested about the cooking method of fruits and its wonderful taste. He gained pleasurable feelings not merely from the taste of the delicious food but also from the surprise due to unexpected standard of the food sold at a relatively low price and the difference in taste between the fruits sold in Hong Kong and Thailand despite they were produced from the same origin. Pleasurable feelings of M6 and F6 also came from the cultural performance by the local people and a visit of scenery spot which was shown in the films respectively.

*M5: ... What attractive to me is... the different characters of every city or village... and the people encountered during the trip... For example, I meet passengers A or B, I might talk to them for a whole night... about stories... my own experiences... and say good bye the next day... I love that... feeling.*

*M5:... very happy... whatever their body shapes are or even my photographic skill might not be very good, I also like them very much.*

*M3: India is very ugly compared with Middle East... Those... were so beautiful. All are carpeted.*

*F2: Yes, much more rural. But sometimes the food was very delicious. The fish was tasty because of the clear water in the pond. The fish was very tasty... and so was the lamb.*

*M6: ... I tried...kind of barbecue... What did they roast? It's banana! The bananas were peeled. The peels were just beside and they roasted the banana... That was possible! Haha...*

*M6: Curry crab. They are not very expensive but the curry was really good. They are not available in Hong Kong... Curry shrimps... the large shrimps... Also, one more thing surprising me was those mangoes sold on the street... so tasty...that I had not eaten before... and also the durian. These two things are available in Hong Kong and even from Thailand but I had not tried such delicious fruits. Haha...*

*M6: Before departure, I knew that we would eat those things but we didn't know the mangoes and durian were much more delicious than that in Hong Kong. Those produced locally were more delicious when eating there... and they became less delicious after being transported to Hong Kong. This is so surprising!*

*M6: ...Some special entertaining performance or its cultures... maybe also ... those gender-benders ... Why could the men be even more beautiful than women?*

*L: Knowing the social phenomenon about the places... is a source of satisfaction for travelers, right?*

*M6: Yes, it is worth traveling for this!*

*F6:... That's real! The houses were really destroyed... A lot of places... the whole area on the hill belonged to it. Those houses captured in films were really destroyed...*

M5 further explained the sources of his happiness. He contended that the differences between the destinations and his living places in many aspects gave him a “new feeling”. This exposure to new environment caused happiness which might even constituted a long term effect to M51.

*M5: The custom is different. It brings about a new feeling. ... When you went to the place, you would... feel something different from that in your living environment. Even the language you speak is different.*

*M5: When you see something new... you would feel... When you see more and more, you would have a feeling of “no pity for the whole life”...*

A sense of relaxation was a source of happiness. M6 felt happy when she got rid of the things in mind when she traveled and M3 expressed his satisfaction by relieved stress and relaxation once he left his living place.

*M6: I'm happy... Going out and forgetting all the things at home... Some people said what are worth visiting? “They are the same.” And I said, “ (They are) different every year! There is improvement, right? Just like Chinese restaurants, they are different every year!*

*M3: I found that I was so happy once getting on the plane and getting on the ferry. I don't have stress anymore.*

*M3: It's very relaxing because you would have stress even though you take a rest for a few days. But once leaving, the mental state wholly changes.*

A sense of freedom was a source of happiness. M5 were pleasurable when he felt free due to an expanded personal space while traveling alone. He further pointed

out that this feeling was even greater than that obtained from cultural exposure. The freedom referred to the relief for social constraints perceived in his original place. He perceived that the social constraints disappeared when he traveled as the local people would not consider some behavior as strange but Hong Kong people would.

*M5: This (cultural exposure) was the second one. Actually, I like... the time when I was given space. So, I like traveling alone. Sometimes, even I went with my friends...a period of time or space was also available for both of us. Like he slept till ten, I get up at eight. Then I would have two hours free time. I go out for a walk alone. Then I would feel very comfortable in those two hours. I don't have any worries and even think of my hassles in daily life.*

*M5:... No constraint. I think Hong Kong people don't accept it easily... don't easily accept that you get close to a crowd of children. But you would not feel strange there...*

Some Pattern II members felt happy about enhanced social relationship with travel companions. Some even distinguished different kinds of satisfactions from traveling with different people.

*M3: I think travel is different. It would be more interesting if one travels with friends. If one travels with family, it would be warmer...*

Enhanced social relationship was a source of happiness but it was limited to travel companions. Apart from feeling happy about enhanced social relationship with their travel companions, a member in Pattern II, i.e. M5 mentioned that meeting new friends also brought about pleasurable feelings to him but he would not regard it as a “by-product” and dependent on chance. He thought that it was possible to develop social relationships during the trips but he did not expect them to be long-lasting. It suggested that meeting new people brought happiness for M5 but it was not considered as a purpose of travel or main sources of happiness.

*M5: To meet new friends... I'm...likely to meet new friends but these new friends might not be very long lasting. Maybe they are only transient, right?*

*M5: It could be counted as one... but it is not so important. It's not a special thing I would demand.*

Most respondents in this group stated no experience of disappointment from travel. M6 perceived that there were the problems in the destinations but this did not affect his emotion. Failure to visit the scenic spots as scheduled did not upset them. M5 mentioned that he would not feel unhappy when he failed to visit a certain promised destination.

*M6: As a traveler, nothing made me disappointed...There were problems of living in some destinations such as Guilin but those things were not important to me.*

*M5: Even if there is somewhere I desire to go to but I could not finally go there or, say, I want to go to a museum or a place but it is closed on that day of the week, I would not think that it is a very great loss. I would not say... "Oh, I couldn't go there... I must go to that place...I would not feel unhappy because I could not go there. It doesn't matter. If I could not go to that place, I could go to another one. It is not a problem.*

### ***Pattern III***

They were happy with all the activities in the trips in general. To M9, the sources of happiness of travel was from a combination of "all activities" in the trips. He regarded travel as an activity which brought pleasures to all the people.

*M9: We were happy with ... all the activities. One must feel happy about travel...Last time, we went to Chicago and Los Angeles.*

In addition, M9 mentioned the conditions under which he felt happy about travel. He regarded travel as a pleasurable thing only when he traveled with his family.

*M9: Going with my family...going together would be a happy thing. As for going with strangers... sometimes I joined package tours, I didn't know some of them and I seldom talked to them.*

*M9: How could travel be interesting if you go alone? It could not be interesting. I don't have much interest in that (travel alone) at all..*

*M9: Travel is a happy thing only when one travels with family. Going to travel alone is meaningless.*

Happiness, however, did not come from a specific aspect. Members in Pattern III did not have certain aspects they especially felt happy with. The pleasurable feeling came from more understanding about the destinations. M7's happiness came from visiting new places, exposure to cultural differences, the beauty of natural scenery and buildings with religious characteristics.

*M8: (Travel) is for knowing more about the place although the places might not be better than Hong Kong.*

*M7: ... Get to know more... (It was) because I had not been to those places. Being able to go there was certainly a happy thing.*

*M7: I like the fresh air in Canada and Australia. The food was fresh and so were the meat and vegetables. Those aspects were pretty good.*

*M7: I was very happy to go on a pilgrimage. Wow, so beautiful... like some people went to the church of Notre Dame in Paris. Wow! The grand construction...The building of the style (were) quite pretty... (Those were) in Italy... Haha... I felt so happy...Ha... because I had not been there before.*

*M7: ... That was not limited to religious buildings. Even I go to elsewhere*

*(without religious buildings), I will also be happy if the places are beautiful.*

#### **Pattern IV**

Sources of happiness of Pattern IV members came from enhanced social relationship with travel companions. F11 felt happy because she could chat with her friends on the journey. She considered travel as meaningless if her travel companions were strangers.

*F11: Walking with several old friends and chatting together were happy things.*

*L: ... Have you met those old friends for a long time?*

*F11: ... Both of us were colleagues in the past.*

*L: I see... So both of you (R51 and her travel companions) had known each other for a long time. If they did not travel with you, would you travel?*

*F11: I won't go then.*

*L: That means you're quite happy to hang out with acquaintances.*

*F11: Yes. If I went with unfamiliar people, without knowing each other, it would be meaningless.*

They also felt happy about natural beauty and the buildings in the destinations. F7 felt happy and comfortable when she saw the Buddha and natural scenery in Mainland China. F7 felt satisfied with the arrangements of the previous package tours because the accommodation was good.

*F7:... If you imagine... going to a temple with people, you can worship the Buddha and see the scenery. Then you will feel very happy and very comfortable.*

*F7: I went to Pu Tuo Shan, Wu Tuo Shan with my friends and some masters so that he accommodations were quite good. But those trips to Guilin, needless to say, must be package tours. And I was lucky too. Those tour packages were also satisfactory.*

## F) Sources of unhappiness

Most of the respondents did not feel unhappy about their previous trips in general. A few respondents in pattern I, II, and III raised some sources of unhappiness in their previous trips.

### *Pattern I*

M2 experienced disappointment occasionally. The sources of unhappiness he mentioned was the misleading and inaccurate information about destinations.

*M2: ... wrong information was provided.*

*L: That means the introduction and information...*

*M2: Misleading.*

*L: So that it caused...conflict between actual outcomes and individual expectation.*

*M2: Yes, definitely. Those are some things encountered no matter by older persons or young people...*

Even though some expectations were not met during the trip, this might not cause unhappiness for F1. When she went to Las Vegas and expected to watch an opera. However, she did not feel unhappy even though she could not see it very clearly due to the far distance from the stage.

*F1: ... This should not be persisted. In the beginning, you... The first thing is to play. Travel is for playing. That is to say, to use the atmosphere of others to influence ourselves. And owing to a lot of causes, the objectives cannot be achieved. Like that time we went to Las Vegas. There was an opera...called Carmen... At that time, we wanted to buy front row tickets. In the end, the tour we participated in went to buy tickets. At last, people had already reserved the tickets we wanted. We can only buy those in the rear area. That is different. It's hard to watch and also ...the precious thing... But regret? No regret. I went*

*there from far away but watched other things. I also hoped to see that but it should not influence my feelings. It doesn't matter. It is always possible to watch this kind of opera in the future. Then, I watched it in Hong Kong.*

### ***Pattern II***

A respondent, M3, felt unhappy when he joined certain tour packages which were dominated by undesirable activities and felt he was cheated by unscrupulous trading methods.

*M3: Disappointed... Sometimes package tours are disappointing...*

*L: Why?*

*M3: This refers to some shopping tours.*

*M3: Many were cheap. We went to Hainan for four days, two week ago. The tour fee was HK\$900 only but it was really about two thousand and one hundred per person. Apparently, the tour fee was nine hundred. Actually, many things were excluded. Then we had to pay other fees as requested.*

*L: ... That means the methods used in those tours organized by travel agents made you feel... very dissatisfied.*

*M3: A little bit dubious ... Those methods used by businessmen for trading were ... quite unscrupulous.*

### ***Pattern III***

They did not experience unhappiness in travel. Going to a place where he could not adapt to the life did not cause unhappiness to M7. He considered that a long trip was not desirable for him but he thought he might be able to get used to the local environment if he stayed for a longer time. M8 thought that he did not experience unhappiness perhaps because he stayed in the destinations only for a short time so that the undesirable things did not appear.

*M7: After living there (Canada) for a month, I was eager to leave because I didn't get used to it... For example, it was necessary to go to places by*

*vehicles and these places were far away. I was in a house all day long. Only when they (my relatives) went out you could go outside for they had to work. So, I didn't get used to that. Perhaps I would if I lived there longer. That would be another situation.*

*L: If so, after living there for a month, you could not adjust to the life there that quickly...*

*M7: So I... decided to go back to Hong Kong.*

*M7: About my trips to Australia and Canada, I was not disappointed. It (Leaving that place) was only because I didn't get used to the life there... I don't like trip which lasted for such a long time.*

*M8: No unhappiness... as a traveler, nothing made me unhappy...I might not notice those desirable things within a short period (of staying in the places)...*

#### ***Pattern IV***

Pattern IV members did not experience unhappiness in their previous trips. F7 further explained the most important thing of travel was to have certain people traveling with her. F11 said that she would not feel unhappy if she failed to visit certain places because opportunities of visiting the same place were available in the future.

*L: Oh, I see. As you said, nothing made you disappointed. That means nothing was disappointing to you... How about... poor food in the temple during travel?*

*F7: No... Those in charge of the temples decided where to go and... Going with them was already a very happy thing.*

*F11: I didn't think of that. I can go there again when there is a chance. I think like this way... I would not think about why I couldn't go there...I can go there someday when there is an opportunity. Thinking like this...*

*F11: ... We discussed together. We could not go there. Let's go there another day. So, we would gather several for us to go together.*

The following tables summarize the characteristics the four patterns of travel behavior and outcome of travel regarding to individual well-being. (Table 4.1, 4.2, 4.3 and 4.4)

Table 4.1 Pattern I

<i>Travel purpose</i>	Sightseeing (in particular destinations), satisfying curiosity, satisfying previous desires, gaining a sense of relaxation, not killing time
<i>Preparation prior to travel</i>	Preparation regarded as important, adoption of more sources of travel information and more resources spent
<i>Participation in activities</i>	Stayed in accommodation of “high” quality, took “less hurried” modes of transport, avoided seeing things available in Hong Kong, only participated in activities in which they were interested and sometimes extended the period of staying
<i>Considerations about future travel</i>	Possessed ideas for future travel and some plans in certain aspects of the trips such as destinations, activities, and time
<i>Sources of happiness</i>	Understanding more about the destinations and experiencing cultural differences, changes of the destinations at different times, slower rhythm of life and enhanced relationship with travel companions
<i>Sources of unhappiness</i>	None for some members (even though sometimes expectations were not met) while some members occasionally experienced disappointment due to inaccurate travel information provided

Table 4.2 Pattern II

<i>Travel purpose</i>	Sightseeing (in destinations with natural scenery), satisfying curiosity, broadening horizons, attending family activities and visiting relatives, applying for migration, treasuring opportunities of travel, and taking part in activities as a result of “personality”
<i>Preparation prior to travel</i>	Fewer sources of travel information used, fewer resources spent, package tours preferred
<i>Participation in activities</i>	More diversified regarding to types of destinations visited, transport modes taken, activities participated in during the trips, more involved in certain activities with personal interests, more flexible itinerary but not altering it for visiting particular destinations or participating in particular activities
<i>Considerations about future travel</i>	Possessed ideas for future travel and some plans in certain aspects of the trips such as destinations, transport mode, and activities
<i>Sources of happiness</i>	Nice weather of the destinations, understanding more about the destinations and experiencing cultural differences, gaining a sense of “new”, relaxation and freedom, enhanced relationship with travel companions, meeting new friends (but not a purpose of travel)
<i>Sources of unhappiness</i>	None for some (even though sometimes expectations were not met) and some members experienced disappointment due to perceiving inaccurate travel information from and unscrupulous practice services of some travel agencies

Table 4.3 Pattern III

<i>Travel purpose</i>	Visiting friends or relatives, attending family activities, responding to the invitations of relatives or friends, and sightseeing
<i>Preparation prior to travel</i>	Sources of travel information principally from travel companions or travel agencies, less involvement in preparation, chose a less “hurried” itinerary
<i>Participation in activities</i>	Not avoided particular activities but might not participate in all kinds of activities, would not extend the period of staying for deeper “investigation” about the destinations, activities, etc.
<i>Considerations about future travel</i>	No current plans for future trips and dependent on other factors such as other activities and safety of destinations, no preferences for particular aspects except one member who would joined his daughter’s wedding ceremony held in foreign countries
<i>Sources of happiness</i>	Enhanced relationship with travel companions (acquaintances only, not other participants of the package tours or strangers), fresh air, and food in the destinations, visiting new places (not from participating in particular activities)
<i>Sources of unhappiness</i>	No experience of disappointment (even though some members felt they were not able to adjust to the local lifestyle)

Table 4.4 Pattern IV

<i>Travel purpose</i>	Responding to the invitations of relatives or friends and satisfying previous desires
<i>Preparation prior to travel</i>	Few sources of travel information, fewer resources spent
<i>Participation in activities</i>	Did not avoid particular destinations, did not participate in particular activities and regarded accommodation, catering, and other activities such as shopping as not important for travel
<i>Considerations about future travel</i>	No current plans for future trips and dependent on other factors including other activities and availability of acquaintances as travel companions
<i>Sources of happiness</i>	Enhanced relationship with travel companions and with tour guides for some members
<i>Sources of unhappiness</i>	No experience of disappointment

The four patterns of travel behavior and outcome of travel regarding individual well-being were compared and the principal characteristics can be highlighted in the table below. (Table 4.5)

Table 4.5 The principal characteristics of four patterns of travel behavior and outcome of travel regarding individual well-being

	<i>Characteristics</i>	<b>I</b>	<b>II</b>	<b>III</b>	<b>IV</b>
<i>Travel purpose</i>	Sightseeing	*	*	*	
	Satisfying curiosity	*	*		
	Gaining a sense of relaxation	*			
	Broadening individual horizons		*		
	Meeting friends and/or relatives		*	*	
	Treasuring travel opportunities		*		
	Satisfying past desires	*			*
	Responding to invitation			*	*
	“Personality”		*		
<i>Preparation prior to travel</i>	Sources of information	More	Fewer	Fewer	Fewer
	Resources consumed	More	Fewer	Fewer	Fewer
<i>Participation in activities</i>	Diversity	Lower	Higher	Lower	Lower
	Depth	Higher	Lower	Lower	Lower
	Selectivity	Higher	Lower	Higher	Lower
	Selection based on nature	*			

	Selection based on “depth”	*		*	
		( <i>sufficient</i> for exploration)		( <i>not too long</i> )	
<i>Considerations about future travel</i>		Destinations, activities & time	Destinations, transport mode & activities	Other activities & safety	Availability of travel companions
<i>Sources of happiness</i>	Enhanced social relationship	*	*	*	*
	Broadened horizon	*	*	*	*
	A “new” feeling		*		
	A sense of freedom		*		
	A sense of relaxation	*	*	*	*
	Meeting new people	*	*		
<i>Sources of unhappiness</i>		No, some members (Occasionally when perceived inaccurate travel information)	No, some members (Occasionally when perceived inaccurate travel information)	No	No

### 4.3 Differences in travel behavior

Referring to the four patterns of travel behavior and a comparison of the principle characteristics (Table 4.5), differences in travel behavior were found. Despite inclusion criteria for the survey required the respondents to be similar in terms of health status and financial status, main differences in travel behavior were identified from initiation, direction and intensity, and persistence of motivation. For the initiation of the previous trips, the differences appeared in the diversity in the purposes. For the direction and intensity, differences appeared in the perceived importance of preparation for travel, sources of travel information, resources spent for preparation before the trips, pace of itinerary, types of transportation, nature of activities, and the intensity of participating in the previous trips. For the persistence, differences were present in purposes, destinations, transport modes, and nature of activities. (Table 4.6)

Table 4.6 Differences in travel behavior

<b>Motivation</b>	<b>Focus of questions</b>	<b>Differences in travel behavior</b>
Initiation	Travel purposes	Nature of purposes
Direction Intensity	Preparation prior to travel and participation in activities	Perceived importance of preparation, sources of travel information, resources spent on preparation, pace of itinerary, types of transportation, nature of the activities, and intensity of participating in activities
Persistence	Considerations for future travel	Purposes, destinations, transport modes, nature of activities, and availability of travel companions

### 4.4 Travel preferences of the members of the four patterns

Based on those differences in travel behavior and explanation for the outcome of travel regarding to individual well-being, six aspects were found to be related to

respondents' preferences regarding to travel. They are destination, travel mode, travel style, travel companion, nature of activities, and intensity of participating in the activities. The table below listed the differences of the four patterns and six aspects of travel preferences. (Table 4.7)

Table 4.7 Differences in the four patterns and six aspects of travel preferences

<b>Differences in travel behavior and outcome of travel regarding individual well-being</b>	<b>Six aspects of travel preferences</b>
Nature of purposes	destination, travel mode, travel style, travel companion, nature of activities, and intensity of participating in the activities.
Perceived importance of preparation, sources of travel information, resources consumed for preparation, pace of itinerary, types of transportation, nature of activities, and intensity of participation	
Purposes, destinations, transport modes, nature of activities, and availability of travel companions	
The explanations for sources of happiness and unhappiness	

As mentioned in Chapter 3, data provided by each respondent were analyzed by the six aspects of travel. Preference of a respondent is present when the response with respect to the aspects of travel is specifically stated. For instance, there deemed to be a preference with respect to destination when one specifically states certain places as targeted places for travel. Some did not specifically state certain destinations/ mode of transportation as their preferences but stated a criterion for their considerations and selection (allowing them to gain a sense of novelty). In that case, they showed travel preferences with respect to *travel style* but not *destination* and *travel mode*.

With the analytical framework on p. 75, data from the respondents in the four patterns were analyzed to obtain the following result. The table below showed the aspects on which the respondents of each pattern specified their preferences with aspect to each of the six aspects of travel. (Table 4.8)

Table 4.8 Travel preferences in six aspects among the members of the four patterns

	<b>Destination</b>	<b>Travel mode</b>	<b>Travel style</b>	<b>Travel companion</b>	<b>Nature of activities</b>	<b>Intensity of participating in the activities</b>
<b>I</b>	*	*	*	(*)	*	*
<b>II</b>			*	*		(*)
<b>III</b>	*		*	(*)	(*)	*
<b>IV</b>		*		*		(*)

\* represents preference in the aspect of travel

(\*) represents preference in the aspect of travel under certain conditions

The preferences for *destinations* were present among Pattern I and III members. They would select particular places for travel according to their criteria. There are no preferences for *destinations* among Pattern II and IV members. Some Pattern II members had some criteria for selecting places for travel but they did not use to them to exclude certain options while Pattern IV members had no criteria for considerations of places for travel.

*Travel mode* is important to Pattern I members. They specified certain modes of transportation for travel. Pattern II and III members did not specify certain *travel modes* as their preferences. Pattern IV members mentioned their aversion to certain modes of transportation for travel.

Preferences for *travel style* are present among Pattern I and III members. They also preferred “objective-orientated” trips although their travel purposes differed from each other in terms of “destination-specificity” and “person-specificity”. Referring to a preference for exposing to the unfamiliar environment, Pattern II members was found to have a preference for a *travel style* of “pursuing novelty” while Pattern IV members who did not show a travel preference in any *travel styles*.

*Travel companion* was a travel preference among Pattern IV members but not Pattern II members. Pattern I and III members showed a preference for travel companions under certain conditions. Pattern I and III members had a preference for *travel companion* depending on their travel purposes.

Preference for *nature of activities* was present among Pattern I members while Pattern II members have a preference for certain types of activities in the trips but they do not use these criteria to determine whether they would participate in the activities in the trips. Pattern III members had a preference for *nature of activities* when those activities are relevant to their travel purposes. Such preferences were not found among Pattern IV members.

Finally, the preferences for *intensity of participating in the activities* in are found among Pattern I and III members. Pattern I preferred a deeper exploration of or participation in the activities. Pattern III members, however, preferred a shorter duration for participating in the activities. Pattern II and IV members had such a travel preference which depends on other factors including situational factors of the destinations, personal emotional status, and preferences of their travel companions.

#### 4.5 The factors which contribute to a pleasurable trip for the members of the four patterns

According to the travel preferences of the four patterns, the factors which contribute to a pleasurable trip of corresponding patterns were identified. (Table 4.9)

Table 4.9 The factors which contribute to a pleasurable trip of the four patterns

<i>Factors</i>	<b>I</b>	<b>II</b>	<b>III</b>	<b>IV</b>
Achieving personal objectives	*			
Broadening horizons	*	*	*	
Overcoming past travel barriers	*		*	*
Grasping travel opportunities		*		
Responding to social expectations			*	*
Gaining destination-specific social satisfaction		*	*	
Gaining non-destination-specific social satisfaction		*		*
Gaining a sense of relaxation	*	*		
Gaining a sense of novelty		*		

\* represents the presence of the factor which contributes to a pleasurable trip for the corresponding pattern

The nature and the meanings of these factors will be explained as follows.

##### *Achieving personal objectives*

Pleasurable feelings came from achieving individual objectives. The respondents had some specific objectives of their trips and they gained pleasurable feelings from travel by achieving their objectives. Their objectives were often destination-specific. In other words, they could only be achieved in certain

destinations such as viewing the natural scenery of a particular destination or participating in some cultural and social activities which are only available in the particular destinations. These objectives were “personal” because individuals’ objectives differ from each other due to individual factors such as hobbies, knowledge, skills, life history, etc. It does not mean that, however, they did not gain pleasurable feelings from travel when they could not achieve their goals. This is one of the factors contributing to a pleasant trip. Other factors may also contribute to the sources of pleasure from travel.

### ***Broadening horizons***

Pleasurable feelings came from a deeper understanding of the destinations in various aspects including the cultures, the scenery, and the people affiliated with the destinations. Respondents felt pleasurable when appreciating the natural scenery of the destinations or knowing more about the lifestyles of the local people. These elements are affiliated with the destinations and they might alter more or less at different times. There could be different methods by which the respondents broadened their horizon, namely, collecting information prior to departure, observation, and participation in certain activities during the trips and collecting information after the trips.

### ***Overcoming past travel barriers***

Pleasures in these circumstances came from overcoming past travel barriers. Due to some travel barriers, some people were not able to travel in the past. For example, they were constrained by work or family duties before retirement. The

limited holidays or leisure time did not allow them to travel easily. After their travel barriers have been removed, they could do what they had not been able to do in the past. They gained pleasurable feelings from overcoming travel barriers by participating in travel (or for a longer duration of trip) which they had been unable to do in their younger days.

### ***Grasping travel opportunities***

Pleasurable feelings came from grasping travel opportunities. This is a more future-oriented aspect than fulfilling past desires. Those who foresee the potential travel barriers in the future would be triggered to travel soon or shortly. They think that their travel opportunities are limited and not sufficient so they should seize the present chances to travel. Some respondents who value travel opportunities so much that they regard travel companions as less important for travel. They tend to gain more travel opportunities by avoiding spending time on preparation for their trips and joining package tours for travel.

### ***Responding to social expectations***

This refers to pleasure obtained from responding to the expectations of other people. These people are usually their relatives and family members in particular. The respondents gained pleasures from satisfying the expectations of other people. Travelers perceive that there is an expectation about travel on them and their travel behavior is a response according to the expectations (going to travel in those cases). Satisfying other expectations is a factor causing pleasurable feelings for travel.

### ***Gaining destination-specific social satisfaction***

Pleasurable feelings came from satisfaction from social interactions with the people affiliated with the destinations. Those people present in the destinations were acquaintances of the older persons. Due to geographic distance between older persons and their acquaintances, older persons had to travel in order to meet their acquaintances and participate in activities with them. This is a destination-specific factor because those being visited have either migrated to, or stayed in the destinations due to other reasons such as study. They are constrained by other factors such as insufficient time so older persons whose time is usually more flexible would travel. Pleasurable feelings from travel come from social satisfaction through interacting with their acquaintances.

### ***Gaining non-destination-specific social satisfaction***

Pleasures came from satisfaction through social interactions and enhanced social relationships with travel companions. This is a destination-specific factor because they were not staying in the destinations. They went along with the older persons throughout the trips.

### ***Gaining a sense of relaxation***

Pleasurable feelings came from a sense of relaxation. Travel provided older travelers with a sense of freedom in different ways. For example, some people gained a sense of relaxation when they left the familiar environment and/or were

relieved of the responsibilities or worries about daily life. For some older travelers, a sense of freedom also came from selecting among alternatives of destinations, travel modes, travel styles, and activities, etc. according to their interests or transient emotions in their trips.

### *Gaining a sense of novelty*

Pleasurable feelings came from a sense of novelty. This group felt pleasurable when they were exposed to new elements in the destinations. The unfamiliar elements gave them new stimulations which contributed to pleasurable feelings. These new stimulations were not only available in certain destinations so the desired stimulations were not destination-specific. Anything, which was not available in the familiar environment to the traveler, could be considered as “new”.

**CHAPTER FIVE**  
**IMPLICATIONS OF THE RESEARCH FINDINGS**

**5.1 Implications of the findings**

5.1.1 Theoretical implications

5.1.1.1 An inductive model of travel behavior

The four patterns of travel behavior suggested a model of two dimensions, namely, specificity of destination and specificity of person, forming four patterns of travel behavior. These are Destination-specific and Non-person-specific, Non-destination-specific and Non-person-specific, Destination-specific and Person-specific, and Non-destination-specific, and Person-specific.<sup>17</sup> Most older persons showed the characteristics of travel behavior of a particular pattern. A few, however, showed a combination of two patterns of travel behavior. This indicates that it is possible to understand travel behavior of Hong Kong older persons by degree of affiliation with the four patterns. (See the schematic representation on p. 150)

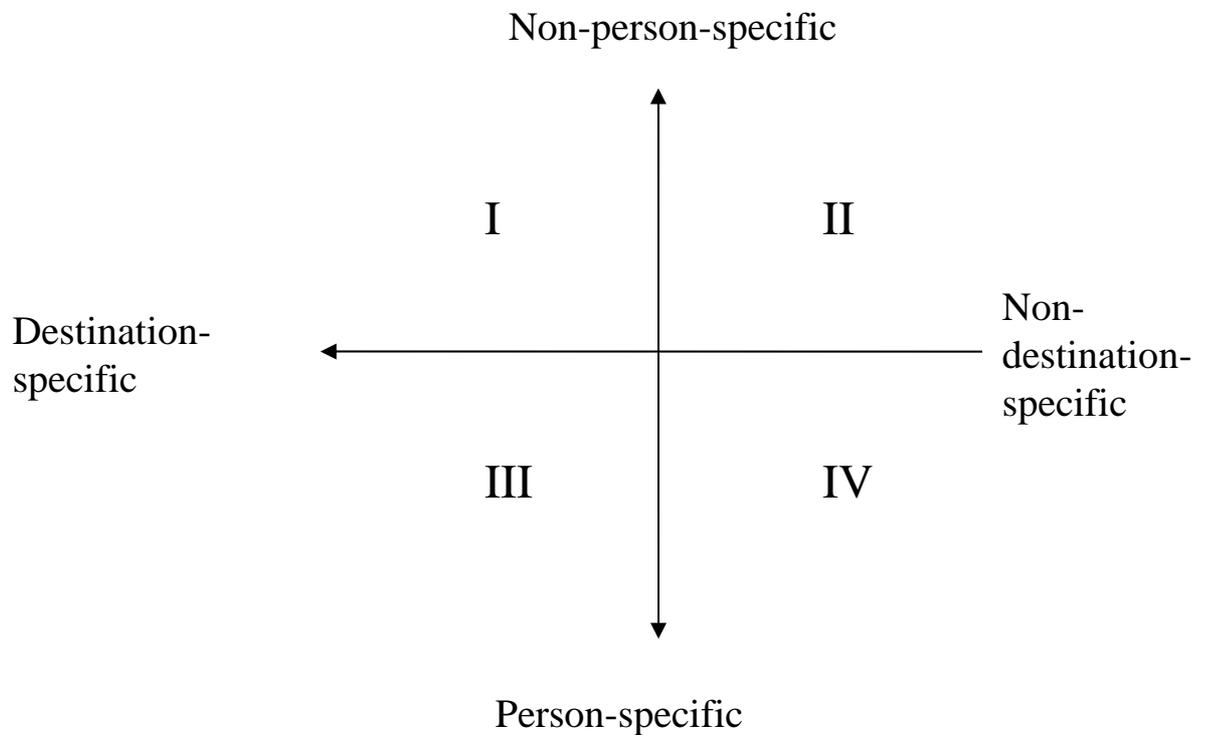
Although the older persons were similar with respect to age, differences in travel behavior of older persons were nevertheless found. This finding agreed with the assertion of Swarbrooke and Horner (1999) that market segmentation by demographic characteristics is rather too crude for understanding the travel behavior of older persons.

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<sup>17</sup> “Destination-specific” refers to the extent to which travel of an individual is related to a destination while “person-specific” refers to the extent to which travel of an individual is related to certain person/people.

Upon knowing with which pattern an older person affiliates, it is possible to better understand people's travel preferences and the factors which contribute to a pleasurable trip. For those older persons who are found to affiliate with more than one patterns, it is possible that they have travel preferences of both patterns they affiliate with. However, it is also possible that they had travel preferences for neither. In other words, travel preferences of those people are less clear than those who affiliate with any one of the four patterns.

A schematic representation of the model  
induced from the four patterns



#### 5.1.1.2 Travel as a means for achieving successful ageing

Referring to the findings, travel can be used as a means for achieving successful ageing. This research provided some insights for older persons' inner dimension of experience and the role of intrinsic motivation. Findings indicated that gaining social interactions and achieving personal goals could be intrinsic motivations for travel. Along this line, travel can be used as a means for successful ageing because, as mentioned in Chapter 2, "strengths of ageing" approach of successful ageing stressed intrinsic motivations are the foundation for action and the source of resilience for ageing individuals.

The result is in line with activity theory. Activity theory stresses that it is necessary for older persons to age successfully by engaging in various types of daily activities. To some respondents, travel provided an opportunity for them to participate in different activities throughout the process of travel. They mentioned pleasure from travel by referring to a range of activities which were related to their daily lives. The *activities* included the collecting travel information prior to travel, discussing arrangements related to itineraries and accommodations and participating in different activities during travel with their acquaintances, and sharing among their friends or relatives after travel. These suggested that travel is an activity which involves some elements of their daily lives and may be used for facilitating successful ageing.

The result is also concordant with continuity theory which states that successful ageing occurs among people who maintain their habits, preferences, lifestyles, and relationships from midlife to later life. Although the focus of this study is not the

role of travel to an individual within a period of changes of life stages, the result suggested travel could be a means for maintaining their habits, preferences, lifestyles, and relationships in different ways. For example, travel provides an opportunity for older persons to continue learning, to keep up a certain level of physical activities, and to maintain social relationships with others. This implies that travel is an option for assisting older persons to reach successful ageing by maintaining their habits, preferences, lifestyles, and relationships.

#### 5.1.1.3 Major travel needs of the four patterns

In the following sections, the travel needs of older travelers who particularly affiliate with one of the four patterns will be described. It is noted that members of each pattern had different needs which could be satisfied by travel but travel was better suited for satisfying a particular aspect of their needs. In other words, those were their needs which travel was more likely to satisfy than other needs of the individual. Those needs, being referred to “major needs of travel” in later parts, will be highlighted in the following paragraphs.

It is noted that travel might also satisfy the needs of older travelers other than their major travel needs; the older travelers affiliated with different patterns also gained pleasurable feelings from satisfaction of other needs. However, other needs being satisfied were regarded as “bonus” which was not major or expected with respect to travel.

***Pattern I: Needs for achieving destination-specific goals***

The major needs of travel of Pattern I was to achieve destination-specific goals which included going to certain destinations for sightseeing in certain destinations and participating in cultural activities. This finding is inconsistent to some of the results of some earlier studies on Hong Kong travelers. Safety was important for selecting destinations but local features such as entertainment, recreation, and cultural attractions were unimportant (Mok & Armstrong, 1995; Qu, Tang, & Zhang, 2004). Safety was a concern for travel among some respondents. However, Pattern I members seemed to express their travel preferences regarding destination when they mentioned local features of the destinations as reasons for their travel behavior and sources of happiness.

They were not averse to spend time on preparing for their trips and tended to adopt less hurried travel style and travel mode. They perceived that it was more likely to satisfy their major travel needs by more preparation, longer duration of travel, and revisiting certain destinations. The outcome (i.e. whether travel brought about pleasurable feelings for them) was positive in general. They regarded travel allowed them to achieve their goals in their previous trips and they felt pleasurable with regard to travel. They also tended to use travel as a means to satisfy their needs in the future such as seeing the changes of the environment and meeting people affiliated with the destinations, and participating in certain destination-specific activities.

### ***Pattern II: Needs for non-destination-specific novelty***

Pattern II members' major need of travel was seeking novelty from travel. For this group, "novelty" is an element in travel leading to pleasurable feeling. They obtained a sense of "new feeling" from travel from understanding more about the destinations by visiting newly developed scenery spots, obtaining information about the destinations from the tour guide, observing daily lives of local people of the destinations, etc. The contrast between the environment of their living place and the destinations led to a perception of cultural differences and a sense of "new feeling". Travel allowed them to gain a sense of relaxation by retreating from the familiar living environment. Novelty, which is considered by Williams and Soutar (2000) as a psychosocial factor which shapes individual value construct in service industry, is only found relevant to travel needs of Pattern II members. This supported that satisfaction from travel is subjective and customer values of tourists are shaped by some psychosocial factors.

Unlike Pattern I members, preparing for the trips prior to departure, following the scheduled itinerary, extending period of stay in the destinations, revisiting the destinations were not necessary for them to obtain pleasurable feelings from travel. It is because their major travel need is not destination-specific. They could satisfy their needs for novelty even though the trips did not have destination-specific characteristics such as certain duration of the trips, nature of activities during the trips, providing detailed information about the destinations, etc. On the other hand, participating in some activities which were not destination-specific also satisfied their needs of "new feeling" such as taking photos in various destinations. Extending trips for visiting certain destinations was not necessarily pleasurable for them and

strictly following the scheduled itinerary might even hinder them to obtain a sense of relaxation.

It implied that travel is a more desirable option among other activities because it is more likely to satisfy their needs for novelty. Furthermore, the “breadth” of travel (i.e. visiting those they have not been to) is more desirable than the “depth” of travel (i.e. deeply exploration about the destinations) for members belonging to this pattern.

***Pattern III: Needs for destination-specific social satisfaction***

Pattern III members’ main travel needs is social satisfaction from enhanced destination-specific social relationship. Travel is a means by which they can meet the persons affiliated with the destination. Since the persons were geographically separated from Pattern III members, travel was essential for them to overcome the geographic distance in order to participate in the destination-specific and person-specific activities (e.g. weddings and graduation ceremony) and person-specific activities (e.g. family union). It suggested that travel is regarded as an essential means for satisfying their needs of enhancing social relationship with the persons affiliated with the destinations. Their need for travel depends on the intensity of destination-specificity and person-specificity of their travel.

Although their major travel needs is destination-specific due to the affiliation of the persons with the destinations, visiting certain destinations do not necessarily satisfy their needs. It is because visiting certain scenery spots might not enhance their social relationships with the persons. Preparing prior to travel, following the

scheduled itinerary, extending period of stay in the destinations, revisiting the destinations are not necessary for them to obtain more pleasurable feelings from travel. Pleasurable feelings come from their social interactions with the persons. It indicates that the desirable mode of travel for older persons of this pattern is destination-specific. Needs for travel can be satisfied provided that the person being visited is affiliated with certain destinations. It suggests that future travel is a means for satisfying their needs if there is a geographic distance between the older persons and the persons being visited.

***Pattern IV: Needs for non-destination-specific social satisfaction***

Pattern IV members' major travel needs is to enhance social relationships with travel companions who are not affiliated with certain destinations. They are usually acquaintances. Travel can satisfy their major travel needs by providing opportunities of enhancing social relationship. Through preparation for the trips, participation in different activities during the trips and sharing among each other after the trips also provide them with opportunities to enhance their social relationships with their travel companions. The sources of pleasure from travel might be partly explained by collectivistic cultural values which prioritize group loyalty, commitment and conformity, and belonging and fitting-in to groups.

Similar to members of Pattern II and III, itineraries with certain destinations, certain kinds of activities and certain intensity of participation are not likely to be the sources of happiness in travel. It suggests that travel can be a means for satisfying their major travel needs but might not be regarded as an essential means; other activities which can satisfy those needs will also bring pleasurable feelings for

them.

Travel sometimes might not always satisfy the needs of the four patterns. However, travel might not cause unpleasant feelings or disappointment when their travel needs were not satisfied in their previous trips. Moreover, some respondents mentioned that they would alter their travel behavior in order to obtain more pleasurable feelings or avoid unpleasant feelings of travel. For example, they would avoid joining package tours which did not match their pace of itinerary, pay more attention to the information provided by the travel agents, avoid participating in some undesirable activities in the package tours, etc. According to some respondents, other factors might also account for unpleasant feelings such as unsatisfactory services and insufficient time for adapting to the local environment of the destinations.

#### 5.1.1.4 Sources of pleasure: more than consumption of tangible goods

It is likely that older persons' pleasurable feelings obtained from travel did not only come from tangible goods. Although they purchased tangible products during their trips, their pleasurable feelings were not merely from consumption of tangible products. As many respondents said, shopping, even though may be argued as a kind of sightseeing, was neither an enjoyable activity nor their main source of happiness in travel. This indicated that tangible goods did not give the respondents pleasurable feelings from travel as shopping is more for purchasing tangible goods. Furthermore, the goods they bought during the trips were not for themselves; they were usually gifts or souvenirs for friends or family. None of the older respondents mentioned purchasing goods as their main purpose of travel or their sources of happiness even

though price, quality, and benefits might be attractive. Some respondents were even adverse to shopping-dominated trips or shopping areas. It seemed that older travelers did not feel unhappy even though they did not buy certain tangible goods to take home after travel. These suggest that merely tangible products in travel did not satisfy their travel needs by providing them with pleasurable feelings.

On the contrary, older persons' pleasure from travel revealed its intangible element. The respondents almost all expressed the view that they gained their pleasurable feelings from increased knowledge about the destinations, broadened horizons, enhanced social relationships with friends and family, etc. These elements are characterized by their intangible nature. Travel provided them with pleasurable feelings more than material satisfaction. For instance, many respondents mentioned they are happy with increased knowledge about the destinations. This source of happiness, labeled as "broadened horizons" in the current research, could be obtained during preparation for their trips, joining activities in the trips and self-learning after the trips. It suggested that the respondents felt happy with some intangible elements during the process of travel. This finding showed some similarities with the results of some previous studies. Some factors related to travel were found including intellectual curiosity, spirituality, gaining a sense of connecting with wider universe, and searching for spiritual center (Gibson, 2002; Achkoyan & Mallon, 1997).

This is congruent with the contention that part of the satisfaction from service industries is intangible, dynamic, and subjective, rather than merely from traditional functional dimension (price, quality, and benefits). The finding is concordant with Holbrook's (1994) argument for heterogeneous nature of service experience. The

value of a product or service is subject to personal interpretation and judgment. In other words, the same trip has different values to different customers. Moreover, the amount of pleasurable feeling obtained by an older person cannot be estimated by calculating prices or quality of tangible goods. To provide a pleasurable trip for older travelers, it is essential to understand and consider the intangible components of travel leading to pleasurable consumption experience.

#### 5.1.1.5 Barriers to travel

In this study, various barriers to travel for the older respondents were found including perceived risks of safety, unwillingness to increase financial burden of family, time clashes with other activities, etc. Regarding to these travel barriers, the results seemed consistent with two-stage model suggested by Crompton (1977) for describing the decision-making process of travel. The model involved the roles of perceived situational variables and destination image. Destination choice behavior was determined by the interaction between destination image and perceived constraints such as time, money, travel ability, etc. The persistence of travel behavior was closely related to the barriers perceived to travel. If they perceived some travel barriers and yet saw no methods for removing or minimizing them, their intention to travel would be lowered. The barriers are discussed as follows.

Different alternatives were adopted when they perceived that there were travel barriers and they could satisfy their travel needs by other methods. For example, Pattern I would wait for another package tour which would match their travel preferences or even went there by themselves rather than changing their travel preferences, because their goals of travel could only be achieved when perceived

trips matched their travel preferences. For Pattern II members, their travel need is to gain pleasure from novelty. Therefore, it is possible that their needs can be satisfied whatever the destinations, travel mode, travel companion, nature of activities, and intensity of participation were. If they perceived certain barriers to travel, they would adopt other travel modes to satisfy their travel needs. For example, they would go on a relatively short trip when they had limited holidays. They would visit other places when they could not follow the planned itinerary instead of visiting there another time. For Pattern III members, their travel barrier was the geographic distance between the older persons and those people they met. When those people at the destinations, who are usually adult children and relatives, did not travel, this barrier could not be removed by other means. For Pattern IV members, some saw travel barriers such as perceived health risks and personal safety. They would adopt other methods to satisfy their travel needs such as finding travel companions, or avoiding activities which they perceived to be potentially harmful to them, or by replacing travel by other social activities.

Confidence in travel appears to moderate the effects of travel barriers on travel behavior. Although some perceived barriers or potential risks to travel, they could overcome them and engaged more in travel. As implied from the findings, they were more confident in travel due to travel-related knowledge and reduced perceived risk due to possessing travel companions.

Knowledge may reduce the travel barriers perceived. Some respondents who perceived travel barriers dared not travel, fearing being unable to communicate in the local language while some would travel even though they perceived the same barrier. The latter respondents had more confidence in travel due to greater

travel-related knowledge.

Moreover, travel companions could reduce the travel barriers perceived by some respondents. Some respondents' decisions to travel were determined by the availability of travel companions. It was explicit that their perceived risk of travel would be reduced when they said they would only travel with acquaintances due to their concern about personal safety.

Considering a wider scope, some barriers might be universal to travelers at all ages. Financial constraints, for example, are not only present among older travelers. Obviously, expenditure on travel is flexible; one may select the goods and services in tourism by considering one's financial ability. Future older persons are less likely to be restricted by financial constraint on travel because of the gradual improvements in health and financial status of the older population in Hong Kong. In addition, those who have more flexible schedules after retirement can choose to travel in the "off-peak" season which allows them to travel at lower costs and sometimes in less crowded conditions.

Older persons in the future will be probably more capable of travel due to an increase in education levels and literacy on average. More educational opportunities will be available in the future and it is estimated that older persons will have a higher education level than present cohorts. This gradual increase in education levels of older persons implies that they will have a higher English standard and more computer knowledge, etc. It is more likely that they would be able to search for travel information by themselves. In addition to the greater ability in communicative skills, they will have a greater confidence in traveling to foreign

countries. Moreover, it is becoming easier and more convenient for them to travel when Hong Kong SAR passports are becoming more widely accepted by other countries such as the USA and EU when visa policies have been relaxed.

The greater the skills for tailoring their trips according to their travel preferences, the more the older respondents will be likely to satisfy their travel needs. They might also develop an interest in travel by gaining pleasurable experience from travel. Therefore, older persons will have one more option of pleasurable leisure activities.

#### *Restoration of Hong Kong people's confidence in travel*

Although safety concerns may hinder the desire for travel or become travel barriers for some Hong Kong people, the confidence in travel of Hong Kong people has been gradually restoring from the practices in tourism by some foreign countries. Many countries have been inputting resources to their inbound tourism, especially after the setbacks of the Asian financial crisis and SARS outbreak. For example, destinations in the Asia and the Pacific region tried to attract tourists by their prompt implementation of promotional campaigns. Those practices helped build up confidence in travel by reducing their psychological travel barriers and encouraged Hong Kong older persons to travel overseas.

#### **5.1.2 Marketing and management implications**

As implied from the influence of different factors on older persons' satisfaction from travel, the following section considers the possibilities of these insights for

contributing to future development of travel services.

### ***Pattern I***

For older persons who have an inclination to pursuing destination-specific goals in travel, it is important to provide accurate travel information such as information of the destinations and activities, degree of participation in activities, the detailed arrangement of accommodation, etc. Source of information can be provided by different means, for example, user-friendly websites on the Internet, information centers, a consultant or a department of travel information in travel agencies, more detailed information on request by travel agencies. They will consider these useful as they can use it to judge the relevancy of the trip to their goals; they can have a more appropriate expectation based on more accurate travel information provided. Furthermore, greater flexibility in service provision is important. More options for accommodation, itinerary, and timetables that are suitable to, or sensitive to, the need of older persons are also helpful for providing a pleasurable trip for older persons of this Pattern.

### ***Pattern II***

A pleasurable trip for older persons in this pattern is one which gives them a sense of refreshment by providing new travel experience. Any new component of travel would be attractive to them including new transport mode, newly developed scenery spots, activities which they have not tried, etc. As mentioned before, they do not feel preparation for their trips to be a pleasurable activity. They do not mind spending less time on preparation and consider package tours are thus more

convenient options. Therefore, travel agencies may continue to look for new components in designing tours with more novelty. Moreover, a sense of freedom can be provided by more flexible itineraries. For instance, a package tour may provide some free time for individual exploration by older persons themselves.

### ***Pattern III***

Those older persons affiliated to this pattern do not have strong preferences about travel except for wanting a relaxing travel style. Their pleasurable feelings from travel were derived from enjoyment of social relationships with their acquaintances. Therefore, package tours which provide most of the preparation they need are attractive to them. In designing a package tour for them, it should be noted that the focus is on the opportunity for them to have more social interaction with their acquaintances while the nature or depth of participation in activities are not very important.

### ***Pattern IV***

Establishing or maintaining social networks among older persons will facilitate their intention to travel of this group. Travel companions occupy a significant position for the older persons in this pattern; availability of appropriate travel companions is the determinant of their decisions to travel. As the majority of respondents prefer travel with “appropriate travel companions”<sup>18</sup>, they will not be restricted to travel owing to lack of travel companions. If there is an association

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<sup>18</sup> There is not a clear meaning of “appropriate travel companion”. Some said they could be old friends, relatives, adult children, and even people with similar travel interests.

developed for linking them with each other, perhaps providing certain types of bonus to attract them, it is possible to link them together by providing them with more opportunities to meet travel companions. Moreover, some strategies can be developed for targeting those whose travel intention is lowered by psychological barriers of safety. For instance, information on the medical services at the destinations could be made explicit. Another possibility is employing medical professionals for medical support for the tours. Their presence for providing immediate medical treatment will reduce the perceived risks of travel.

### **5.1.3 Implications for government policies**

#### *Reducing travel barriers by relaxation of visa policies in other countries*

Relaxation of visa policies also helped reduce practical travel barriers. For some areas, especially South-East Asia, noticeable relaxation of visa policies was introduced. There was further implementation of the ASEAN visa-free zone for ASEAN nationals. Many countries have also been relaxing their immigration policies. For example, The Philippines relaxed its visa policy for Chinese visitors. India had an experimental visa-on-arrival scheme for foreign tourists of 16 nationalities, while the Maldives allowed a free 30-day visa on entry for all nationalities, conditional on satisfying their immigration requirements (UNWTO, 2006).

The Hong Kong Tourism Board (HKTB) can cooperate with official tourism departments of other countries for waiving tourist visas or simplifying the procedures of application for Hong Kong residents. Such practice, as separate

bilateral deals in 2004 and further in 2005 and subsequently have been greatly attracting more Mainland tourists to travel Hong Kong, and may encourage more Hong Kong older persons to travel outside the SAR.

### *Facilitating intergenerational tourism*

The government can facilitate the involvement of older persons in outbound tourism by implementing promotional campaigns and even providing financial subsidies for older persons to travel. More Hong Kong people have more leisure time after the implementation of “five-day working week” in government bodies and some commercial organizations. This has allowed more Hong Kong employees to have leisure time for travel although of course this does not directly affect older retired people. Local government can, through the mass media or other social associations, promote the concept of intergenerational tourism. This will provide another option for adult children to express filial piety to their older parents and enhance intergenerational relationships in the family. As noted by some respondents, they seldom travel out of Hong Kong by joining tours organized by social organizations. To date, local tours are available in many non-profit social organizations. However, probably limited by financial resources, these organizations find it difficult to organize tours to farther countries. Therefore, government may subsidy the financial expenditure of older persons to engage travel or some social organizations which organize long-haul package tours. The basis for this could be to encourage active and successful ageing older population and more healthy older population. In addition, specially focused non-profit groups for older persons (such as ODYSSEY in Australia) may be established in Hong Kong.

**CHAPTER SIX**  
**CONCLUSIONS, LIMITATIONS, AND**  
**RECOMMENDATIONS TO THE STUDY**

**6.1 Concluding remarks**

Older persons behave differently with regard to travel. They are not a homogenous group whose travel behavior can be understood and represented by market segmentation by age. Based on the different patterns of travel behavior of older persons, this study found differences in six aspects of travel preferences of older persons, i.e. destination, travel mode, travel style, travel companion, nature of activities, and intensity of participating in the activities. They gained pleasurable feelings from travel under different situations, supporting that consumption experience in travel is dynamic, subjective, and intangible.

From older persons' accounts for their travel behavior and sources of pleasurable feelings from travel, nine factors were identified as contributing to a pleasurable trip of older persons. They are achieving personal objectives, broadening horizons, overcoming past travel barriers, grasping travel opportunities, responding to social expectations, gaining destination-specific social satisfaction, gaining non-destination-specific social satisfaction, gaining a sense of relaxation, and gaining a sense of novelty.

These factors also help understand the individual needs of older persons. It was found that older persons in each pattern differed from each other in their travel needs, i.e. the major needs which can be satisfied through travel. They are needs for

achieving destination-specific goals, needs for non-destination-specific novelty, needs for destination-specific social satisfaction, and needs for non-destination-specific social satisfaction. Travel is a potential a means for satisfying older persons' needs and providing pleasurable feelings. It suggested that travel could be one of the leisure activities which help enhance SWB and achieve successful ageing.

As suggested by the explanation of travel behavior by the respondents, some barriers to were found. Travel barriers included perceived limitations of financial and physical status for long-haul trips, perceived risks of personal safety, and lack of travel companions. Confidence in travel and possessing travel-related knowledge seemed to moderate the effect of these travel barriers on travel behavior.

Various factors such as gradually improving health and financial status, more confidence to travel owing to increased travel-related knowledge, more accessible travel documents, and further relaxation of visa policies also implies reducing travel barriers and projects a increasing tendency of outbound travel of older persons in the future. Therefore, travel services providers should notice this potential silver market of Hong Kong outbound tourism and consider these factors contributory to a pleasurable consumption experience for individual older person.

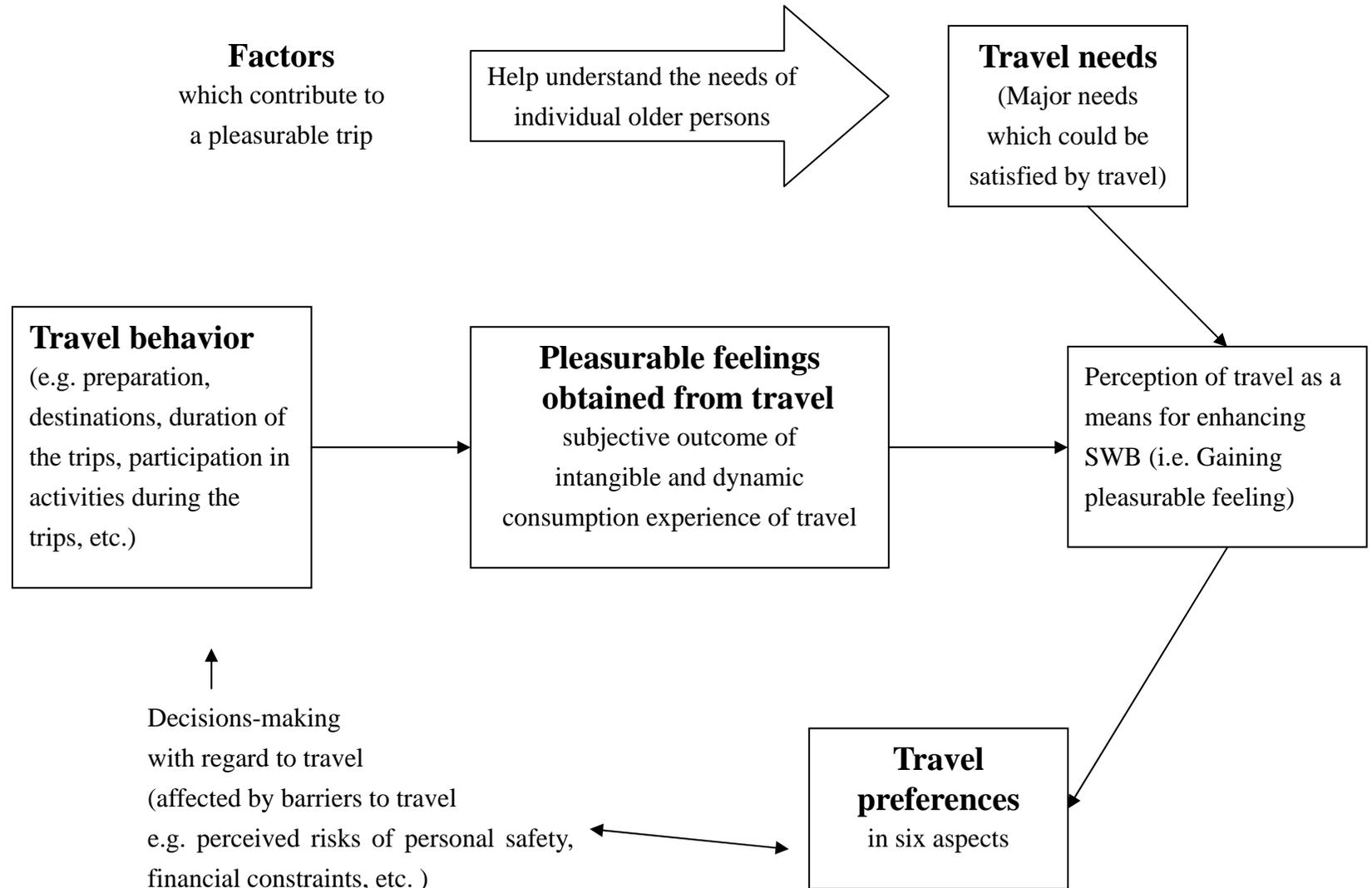
As concluding remarks, the factors identified to be contributory to a pleasurable feeling obtained by older persons in travel help understand their travel needs. Upon their perception of travel as a means for satisfying their needs, they were triggered to travel and presented their travel preferences in six aspects. Their travel behavior, however, was also affected by perceived barriers to travel because these travel

barriers were related to their decision-making in different aspects of travel such as preparation, participation in the activities during the trip and the duration of the trips, etc. Therefore, due to the interactions between travel barriers and travel preferences, older persons had different patterns of travel behavior. Travel brought pleasurable feelings to older persons in general. Moreover, their pleasurable feelings obtained from travel were found to be a subjective outcome of intangible and dynamic consumption experience of travel. It suggests that older persons might change their perceptions of travel as a means of gaining pleasurable feelings and thereby different travel behavior in the future. (A schematic representation is given on p. 170)

## **6.2 Limitations to the research and recommendations for further study**

As in any small-scale research, this research was conducted only on certain small portion of Hong Kong older travelers. This study excluded those Hong Kong older persons who did not fulfill the inclusion criteria. Those might be older persons who have not traveled outside Hong Kong or perceive themselves financially and physically less capable of travel are not under investigation in this study. Hence, the result obtained in this research only sheds light on a certain portion of Hong Kong older population. Further research may investigate the travel phenomenon of the other portions by broadening the criteria for recruiting sample. For instance, the focus of further research may be on the readiness of travel for enhancing quality of life or promoting healthy ageing of older persons who are less able to travel.

**Concluding remarks of the relationships among the factors, travel needs, travel preferences, travel behavior, pleasurable feelings obtained from travel (A schematic representation)**



Second, the small sample size of the research will lead to a limited generalizability of the data. The result obtained in this research could not be used, for example, for understanding the travel preferences of other Hong Kong older persons even with a similar background (those who also fulfill the criteria of sampling). Rather, it provided a base for deeper research on key features of travel patterns and travel needs of Hong Kong older persons. It is possible that an older person who fitted the selection criteria would not show the characteristics of the patterns identified in this research. It is also possible that one might affiliate with two or more patterns, implying the different combinations of affiliation. Therefore, quantitative research could perhaps now be conducted to have a higher generalizability by drawing a representative sample.

Third, the results might not be as applicable to future cohorts of older persons, even in Hong Kong. As mentioned in the introduction, the physical and financial status of older persons have gradually been improving. Moreover, travel barriers for older travelers will diminish owing to increasing education levels, financial resources, knowledge, more convenient procedures for travel, etc. These changes project a considerable potential “silver market” in tourism and alterations in travel needs among older persons in the future. Future studies are suggested to investigate whether there are continuing changes in the travel behavior, travel preferences or other well-being and travel-related issues under the changing conditions and whether those changes influence pleasure gained by older persons from travel.

## Appendix I

### Interview Guide (In-depth face-to-face individual interviews with older persons)

#### Travel Behavior, Travel preferences, and Subjective well-being of Older Persons in Hong Kong

*(English translation; interview conducted in Chinese)*

Place of interview: \_\_\_\_\_

Sources of data: \_\_\_\_\_

Time of starting interview: \_\_\_\_\_

Time of ending interview: \_\_\_\_\_

Duration of interview: \_\_\_\_\_

#### **Introduction**

*I am, Little Cheng, an MPhil postgraduate student in Social Sciences at Lingnan University. I am conducting a research project about travel of Hong Kong older persons. Thank you for sparing your time in this interview to express your thoughts about travel.*

#### **A. Research objective**

We hope that this research will give valuable insights into the travel needs of older citizens in Hong Kong. As well as being in academic study, we hope that in the long run we will be able to give advice to the relevant organizations to enhance the well-being of our older people.

#### **B. The importance of your participation in this interview**

You are an older person in Hong Kong so that you can let us know the thoughts older persons with respect to travel.

### **C. Assurance of confidentiality of data**

All the information you provided for this research will be kept confidential.

### **D. Request for audio recording and note-taking**

For the purpose of future reference, I would like to have an audio record of the interview if you agree.

### **Part A: Background information**

1. Name: \_\_\_\_\_
2. Sex: Male / Female
3. Age: \_\_\_\_\_
4. Place of birth: \_\_\_\_\_
5. Education level: \_\_\_\_\_
6. Marital status: \_\_\_\_\_ (Single/ Married/ Widowed/ Separated)
7. Number of children: \_\_\_\_\_
8. The time of living in Hong Kong: \_\_\_\_\_
9. Financial status (self-rated): \_\_\_\_\_
10. Health status (self-rated): \_\_\_\_\_
11. Do you think that you can have financial and physical abilities to travel places outside Hong Kong? Yes/ No

*There are no right or wrong answers for the following questions. You may answer them according to your own case.*

### **Part B: Exploratory questions and follow-up questions**

#### *I. Initiation of motivation*

1. Where did you travel outside Hong Kong in the past? Why?
2. When did you travel?
3. How long did you travel?
4. Who made the decision to travel? Why?

*II. Direction and intensity of motivation*

5. How did you prepare for your previous trip? Why?
6. What activities did you join during your previous trips? Why?

*III. Persistence of motivation*

7. Do you have any plans for future travel? Why?
8. If you receive a free a week cruise journey, how would you deal with it?  
Would you travel by it? Or would you give it to other people?

*IV. Sources of happiness and unhappiness*

9. Do you have anything you feel happy regarding your previous trips? (if any)  
Why?
10. Do you have anything you feel unhappy regarding your previous trips? (if  
any) Why?

## Appendix II

### 訪問指引 (深入訪談; 長者)

#### 香港長者的旅遊行為、旅遊喜好及主觀感受

(英文翻譯; 訪問以中文進行)

訪問地點： \_\_\_\_\_  
資料來源： \_\_\_\_\_  
開始訪問的時間： \_\_\_\_\_  
結束訪問的時間： \_\_\_\_\_  
所需時間： \_\_\_\_\_

#### 簡介

訪問員的自我介紹：我名叫小小，是嶺南大學社會科學系哲學碩士學生，現正進行一項有關長者旅遊的研究。多謝您撥冗參與是次訪問，並表達您的想法。

#### 甲、研究目的

本調查希望透過此研究了解香港長者的旅遊需要，更期望此研究於學術研究上有所貢獻，長遠期望能為相關機構提供意見，以提升改善長者福利事務水平。

#### 乙、您參與是次訪問的重要性

由於您是香港長者，所以您能讓我們知道他們如何表達對旅遊的感受和看法。

#### 丙、保密資料的保證

您在是次訪問中所提供的資料將不會公開。

#### 丁、徵求錄音的同意

若您同意，我將會錄下訪問內容，方便日後作參考用途。

## 甲部：背景資料

1. 名字：\_\_\_\_\_
2. 性別：\_\_\_\_\_
3. 年齡：\_\_\_\_\_
4. 出生地點：\_\_\_\_\_
5. 教育程度：\_\_\_\_\_
6. 婚姻狀況：\_\_\_\_\_ (單身 / 已婚 / 喪偶 / 分居)
7. 子女數目：\_\_\_\_\_
8. 在香港居住的時間：\_\_\_\_\_
9. 經濟狀況(自我評估)：\_\_\_\_\_
10. 健康狀況(自我評估)：\_\_\_\_\_
11. 您認為以您的經濟狀況和健康狀況是否能夠到香港以外的地方旅遊？  
是 / 否

以下問題沒有對或錯的答案，請您根據個人情況回答以下問題。

## 乙部：初探問題及後續問題

### I. 旅遊動機的起始

1. 以往您曾到訪哪個香港以外的地方旅遊？為甚麼？
2. 哪個 / 些旅程在何時？
3. 哪個 / 些旅程有多久？
4. 誰作出去旅遊的決定呢？為甚麼？

### II. 旅遊動機的方向及強度

5. 您如何準備以往的旅程？為甚麼？
6. 在旅程中，您參與甚麼活動？為甚麼？

### III. 旅遊動機的持續性

7. 您現在是否正在計畫去哪裡旅遊呢？為甚麼？
8. 假設您獲得一個免費的豪華郵輪一周之旅，並可選擇任何目的地，您會如何處理它呢？您會自己去旅行或送給別人？為甚麼？

### IV. 對以往旅程的感受

9. 對於以往的旅程，哪些東西令您愉快？(如有)為甚麼？
10. 對於以往的旅程，哪些東西令您不愉快？(如有)為甚麼？

## Appendix III

### Interview Guide (in-depth face-to-face individual interviews with an experienced traveler/ a tour guide)

#### Travel Behavior, Travel preferences, and Subjective well-being of Older Persons in Hong Kong

*(English translation; interview conducted in Chinese)*

Place of interview: \_\_\_\_\_

Sources of data: \_\_\_\_\_

Time of starting interview: \_\_\_\_\_

Time of ending interview: \_\_\_\_\_

Duration of interview: \_\_\_\_\_

#### **Introduction**

*I am, Little Cheng, an MPhil postgraduate student in Social Sciences at Lingnan University. I am conducting a research project about travel of Hong Kong older persons. Thank you for sparing your time in this interview to express your thoughts about travel of older persons in Hong Kong.*

#### **A. Research objective**

We hope that this research will give valuable insights into the travel needs of older citizens in Hong Kong. As well as being in academic study, we hope that in the long run we will be able to give advice to the relevant organizations to enhance the well-being of our older people.

#### **B. The importance of your participation in this interview**

You are an experienced traveler and you have been living in Hong Kong for a long time (or a tour guide and serving older travelers in Hong Kong). Therefore, you can provide us with a deeper understanding about the thoughts and feelings of Hong Kong older persons with respect to travel.

### **C. Assurance of purpose of data collection**

All the information you provided in this interview will be used for research only.

### **D. Request for audio recording and note-taking**

For the purpose of future reference, I would like to have an audio record of the interview if you agree.

### **E. Exploratory questions and follow-up questions**

#### *I. Initiation of motivation*

1. Where do older persons usually/ like to travel outside Hong Kong? Why?
2. How long do their trips usually last for?
3. Who are the decision-makers of the arrangement for their trips usually?

#### *II. Direction and intensity of motivation*

4. How do older persons prepare for their trips? Why?
5. What activities do older persons join during their trips? Why?

#### *III. Persistence of motivation*

6. What do you think about the differences in travel preferences between older persons nowadays and those in the future? Why?

#### *IV. Sources of happiness and unhappiness*

7. Is there anything regarding travel making older persons happy? (if any) Why?
8. Is there anything regarding travel making older persons unhappy? (if any) Why?

## Appendix IV

### 訪問指引 (深入訪談; 資深旅行家/ 旅行團領隊)

#### 香港長者的旅遊行為、旅遊喜好及主觀感受

(英文翻譯; 訪問以中文進行)

訪問地點： \_\_\_\_\_  
資料來源： \_\_\_\_\_  
開始訪問的時間： \_\_\_\_\_  
結束訪問的時間： \_\_\_\_\_  
所需時間： \_\_\_\_\_

#### 簡介

訪問員的自我介紹：我名叫小小，是嶺南大學社會科學系哲學碩士學生，現正進行一項有關長者旅遊的研究。多謝您撥冗參與是次訪問，並表達您對於長者旅遊的想法。

#### 甲、 研究目的

本調查希望透過此研究了解香港長者的旅遊需要，更期望此研究於學術研究上有所貢獻，長遠期望能為相關機構提供意見，以提升改善長者福利事務水平。

#### 乙、 您參與是次訪問的重要性

由於您是在港居住多年的資深旅行家/ 為香港長者服務的旅行團領隊，所以您能讓我們更深入了解香港長者對旅遊的感受和看法。

#### 丙、 資料用途的保證

您在是次訪問中所提供的資料將只作研究用途。

#### 丁、 徵求錄音的同意

若您同意，我將會錄下訪問內容，方便日後作參考用途。

## 戊、 初探問題及後續問題

### I. 旅遊動機的起始

1. 長者通常到訪哪個香港以外的地方旅遊？為甚麼？
2. 他們的旅程通常多久？
3. 旅程的安排通常由誰決定呢？

### II. 旅遊動機的方向及強度

4. 長者通常如何準備他們的旅程？
5. 在旅程中，長者通常參與甚麼活動？為甚麼？

### III. 旅遊動機的持續性

6. 您認為將來的長者和現今的長者對於旅遊方面的喜好有否不同？為甚麼？

### IV. 對以往旅程的感受

7. 您認為旅遊有甚麼東西令長者愉快？(如有)為甚麼？
8. 您認為旅遊有甚麼東西令長者不愉快？(如有)為甚麼？

**Appendix V General profile of the respondents**

Code <sup>19</sup>	Sex	Age	Education level	No. of child-ren	Marital status	Place of birth	Years from retirement	No. of years of living in HK	Financial status (self-rated)	Health status (self-rated)	Destination of travel
<b>Pattern I</b>											
F1	F	67	College	2	Married	Mainland China	7	20	Satisfactory	Good	Europe and Japan
M1	M	73	High school	2	Married	Mainland China	3	61	Satisfactory	Good	Mainland China
M2	M	67	Postgraduate	<i>Missing</i>	Married	Singapore	8	>30	Good	Good	“Seven continents and Five Seas”
<b>Pattern II</b>											
M3	M	66	High school	2	Married	Mainland China	9	42	Satisfactory	Satisfactory	Australia, Belgium, France, Holland, and Mainland China
F2	F	78	Primary school	5	Widowed	Mainland China	>30	>60	Satisfactory	Good	Australia, Mainland China, Russia, and the USA
F3	F	69	No formal education	7	Married	Hong Kong	N/A	N/A	Satisfactory	Satisfactory	France, Japan, Korea, Mainland China, South Africa, Taiwan, and UK
F4	F	78	<i>missing</i>	3	Married	Hong	>20	15	Satisfactory	Satisfactory	Mainland China

<sup>19</sup> M = Male respondent  
F = Female respondent

						Kong						
M5	M	60	High School	0	Single	Mainland China	2	59	Very good	Very good	Mainland China	
F5	F	78	No formal education	2	Married	Mainland China	<i>missing</i>	<i>missing</i>	Satisfactory	Satisfactory	Mainland China	
F6	F	73	No formal education	5	Widowed	Mainland China	15	46	Satisfactory	Good	Macao, San Francisco, and Thailand	
M6	M	74	College	2	Married	Mainland China	10	28	Satisfactory	Satisfactory	Canada, Macao, Thailand, and Mainland China	
<b>Pattern III</b>												
M7	M	73	High school	2	Married	Vietnam	6	Many years	Satisfactory	Satisfactory	Australia, Canada, Mainland China, and Vietnam	
M8	M	70	No formal education	3	Married	Mainland China	8	60	Satisfactory	Satisfactory	Australia, Macao, and Mainland China	
M9	M	67	College	2	Married	Indonesia	4	34	Satisfactory	Satisfactory	Mainland China and U.S.A.	
<b>Pattern IV</b>												
M4	M	74	No formal education	4	Married	Mainland China	6	50	Satisfactory	Very good	Mainland China	
F7	F	77	No formal education	4	Widowed	Hong Kong	N/A	N/A	Fair	Satisfactory	Mainland China, Philippines, and Vietnam	
F8	F	79	No formal education	0	Married	Mainland China	9	>60	Satisfactory	Satisfactory	Mainland China, Malaysia, Philippines, Singapore, Thailand, and U.S.A.	
F9	F	79	No formal	5	Widowed	Mainland	12	>60	Satisfactory	Satisfactory	Canada, Mainland China, and	

			education			China						Thailand
F10	F	69	No formal education	2	Married	Mainland China	>10	>50	Satisfactory	Satisfactory		Canada, Mainland China, and Thailand
F11	F	74	No formal education	5	Married	Mainland China	“long time”	>40	Satisfactory	Satisfactory		Mainland China
F14	F	71	No formal education	6	Widowed	Mainland China	15	42	Satisfactory	Satisfactory		Japan, Mainland China, Malaysia, Singapore, and Thailand
F15	F	64	No formal education	4	Married	Mainland China	10	50	Satisfactory	Fair		Mainland China
F16	F	72	5 years	4	Widowed	Mainland China	N/A	49	Satisfactory	Satisfactory		Mainland China
<b>Respondents showing characteristics of more than one patterns (Patterns II and IV)</b>												
F12	F	76	No formal education	2	Widowed	Mainland China	>10	“many years”	Satisfactory	Satisfactory		Macao, Mainland China, Philippines, and Taiwan
F13	F	77	Primary three	2	Widowed	Mainland China	about 10	47	Satisfactory	Satisfactory		Japan, Mainland China, and Taiwan

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