



## Research article

# Business and third sector organisations, ageing and the silver visitor economy: An untapped opportunity?

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## 1. Introduction: an ageing world and the visitor economy

Ageing populations have emerged as a global problem for governments and societies [1,2]. Few studies have moved from a largely negative narrative focused on the ‘ageing problem’ [3] to a more positive framing of older people as participants within the economy with consumer demands that offer significant opportunities for businesses, including the visitor economy [4]. Instead, much of the health-focused research, emanating from interdisciplinary studies in gerontology [5], views ageing as a constraining influence on human behaviour. In this respect, ageing presents a wicked problem [6] as a societal issue with significant complexities [7], lacking conceptual clarity in how it is defined, perceived and approached as a critical global challenge.

Critical gerontology research [8] questions this wicked problem conceptualisation by critiquing the assumption that older people are a burden on society, offering a more positive lens through which to view ageing. From a business perspective, ageing populations represent a consumer group with considerable potential, as the term *silver economy* denotes, as time for leisure increases in later life [9]. Yet, as the paper argues, to fully recognise the potential contribution of the silver consumer to the visitor economy, arguably the world’s largest economic sector [10], businesses need to recognise the complexity of ageing and the heterogeneous nature of this group to nurture this market opportunity. To date, much of the research on ageing and the visitor economy has been demand-led (i.e. focusing on what consumers want and do) rather than on supply-side issues (e.g. how businesses perceive ageing and its potential). While older age groups have disposable income that the sector could attract, a disjoint is apparent with regard to supply-led business activity. As Barclays [11] demonstrated, this creates a paradox where only 5 % of visitor economy businesses recognise the importance of an ageing demographic despite contributing 20 % to turnover. This paradox is unpacked further in this paper to gauge how businesses define and conceptualise ageing, and to demonstrate changes that could create a positive narrative of ageing for the visitor economy sector. Commencing with a review of the complexities in the interdisciplinary research on ageing and the limited connection to the visitor economy, the paper develops a broad research-led framework based on a qualitative exploration of emerging issues from a range of visitor economy stakeholders. The findings explore implications for businesses and the management of the visitor economy as ageing consumers become a more dominant market segment.

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## 2. Literature review

### 2.1. Ageing and its interdisciplinary analysis: implications for the visitor economy

Ageing has received considerable attention from disciplines that contribute to the study of gerontology, including demography, which highlights the scale and scope of the issues currently facing many countries worldwide as outlined in Table 1. As UNDESA [12] states ‘population ageing is a global phenomenon: virtually every country in the world is experiencing growth in the size and proportion of older persons in their population’. An ageing population refers not only a larger number of older people but also increased life expectancy. In the UK, for example, one-third of children born in 2020 may expect to live to the age of 100 [13] illustrating the effect of expanding life expectancy and longer leisure lives [14]. Globally, similar demographic change is forecast over the next 30 years, an issue already highlighted as needing an urgent shift in business and service orientation within economies such as China, France [15] and the USA [16,17] and one from which the visitor economy is not immune.

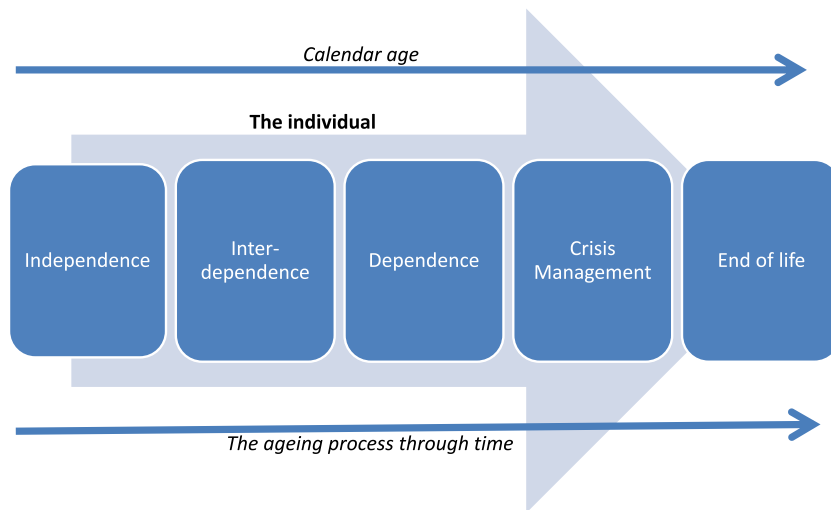
Ageing is characterised in a multitude of ways within social science, science and the humanities, creating highly specialised sub-areas of ageing-focused research, many of which do not interconnect when new areas, such as business research, are introduced. Scholars acknowledge two contrasting paradigms associated with how ageing is theorised and approached, and which impact and shape the research agendas and philosophical approaches used to analyse ageing. The positive view of ageing is based on narrative approaches to ageing from a life course perspective, often arguing that it is an opportunity for the individual to live and age well [20]. This paradigm has seen further development with the impetus from initiatives around age-friendly practices to enable people to remain active in later life [21]. By implication, engagement with the visitor economy is about supporting ageing well, allowing individuals to achieve happiness, fulfilment and meaning in their life [22] and so it has a positive contribution to make. Conversely, more negative analyses create a narrative around the problem of ageing for many developed and developing societies as Table 1 illustrates. This position is premised on lack of preparedness in global society for growing proportions of ageing people in the population which will significantly impact how services and infrastructure will need to be designed to become more age-friendly [23]. Ageism is a further strand of this negative narrative [24], which is embedded in the language, behaviour, institutions and organisations in society that reinforce negative stereotypes of the ageing population, which marginalise the ageing population and places barriers to ageing well [25]. In spite of an increasing amount of leisure time [26,27], physical and perceived barriers to accessing the visitor economy exist [28]. These barriers are almost always examined from the consumer perspective [29] and, to date, no studies related to the visitor economy have identified how businesses may directly or indirectly exclude or overlook certain elements of an ageing population through their perception, behaviours and attitudes. Other key debates associated with ageing at a global scale include the effect of an ageing population structure on the economy, compounded by a shrinking younger labour force (upon which the visitor economy is particularly dependent – [30–32], and by implication a potentially declining tax base to support an ageing population [33].

Cross-disciplinary analysis of ageing as a concept demonstrates that defining old age as a later stage in the life cycle is problematic and lacks clarity and consistency. This is important from a business perspective given the way organisations market their products using age-related classifications to target consumers [34–37]. The term ageing is often conflated with retirement and calendar age definitions do not correspond with the perception of when older age begins. Many definitions of older age start at age 50 or 55 and represent mid-life to older life, with the WHO, for example, using the period after 60 as the beginning of old age. There is broad agreement within gerontological research that biological age and calendar age is not necessarily the same thing [38]. Seeking to define old age, whilst biologically inevitable, is dependent upon the way different societies socially construct and perceive old age. One facet of socially constructed meanings of old age relates to the roles which older people play in society, especially the physical and psychological decline that reduces the ability to participate in activities, such as work. The result is that old age has been seen as synonymous with retirement (see an early study [39]) and leisure time in retirement has been seen as paradoxical because the time is available but there is a period of diminishing physical activity through time [40] although there may be exceptions to this [41,42]. But the expansion of life expectancy has also made ageing a more contested term, challenging the declining activity level hypothesis as it increased life expectancy is adding more complexity for individual experiences of ageing. As a stage in the life course, ageing now extends from mid-life (i.e. early to mid-50s) to much older life (over-80s) in many developed nations (Fig. 1) building on the notion of ageing as an inevitable process that starts at birth (Fig. 2). Potentially up to half an individual’s life may now be defined as ageing. Clearly, these changing demographics will create a range of positive opportunities and more negative challenges for many sectors of

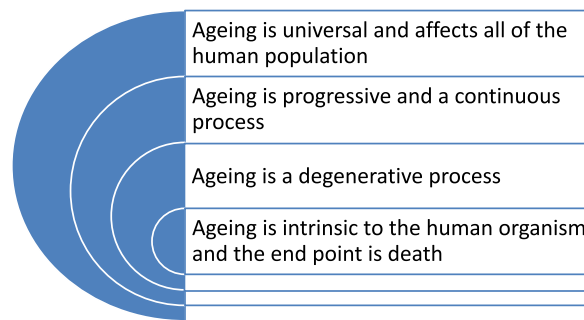
**Table 1**  
Illustrations of the scale and scope of the world’s ageing population.

- In 2019, 703 million people were over the age of 65 years globally; by 2050 this is expected to double to 1.5 billion.
- The proportion of over 65-year-olds increased from 6 % in 1990 to 9 % in 2019 and it is forecast to reach 16 % by 2050
- The number of people over 80 years of age is forecast to triple
- The proportion of the population aged 65 or over is higher than the 0–14 age group in most European countries, as well as some Asian countries, most notably in Japan, which has the highest proportion of people aged over 65 globally.
- Population ageing in Japan (termed *kōreikashakai*, 高齢化社会) saw the number of over 65-year-olds surpass the number of children in 1997.
- In Japan, if present trends continue, it will be seen as a declining population dropping from 127 million in 2019 to 107 million by 2040, with the over-65 age group comprising 40 % of the total population by 2055.
- In the UK, under 18-year-olds are outnumbered by those aged over 60
- In Italy 13 % of the population comprised children under 14 years of age and those aged over 65 years of age numbered 23 % in 2019.

Sources: Based on Reference [13], Reference [18] and Reference [19].



**Fig. 1.** The stages of ageing. Source: Author, developed from Frankel’s model as cited by Knazze B.V., Laaraviere M., Curry Y., Senior Services Division. 2023 Program Portfolio and Strategies, City of Chicago, 2023. [https://www.chicago.gov/content/dam/city/depts/fss/supp\\_info/SeniorServices/SeniorServicesDivision-BK.pdf](https://www.chicago.gov/content/dam/city/depts/fss/supp_info/SeniorServices/SeniorServicesDivision-BK.pdf).



**Fig. 2.** Ageing as a processSource: Developed from Strehler (1962).

society, not least the visitor economy at a global, national, regional and local level. At the very least, the visitor economy will have to adapt products and services to changing markets, potentially making their offer more accessible and heterogeneous in terms of its appeal to different age groups. Whilst the *ageing as a problem* narrative persists as part of the wicked problem conceptualisation, for the visitor economy ageing as a growing opportunity has remained largely overlooked.

**2.2. The silver visitor economy and its economic potential**

A growing range of academic and consumer analyses suggest that the ageing population has a considerable untapped economic potential [43]. The *silver economy* comprises those aged 50 or over as a broad consumer segment, offering significant opportunities as well as challenges for the visitor economy [44–46]. Measurements of the value of the silver economy are many and varied, dependent on age parameters, geography, and wealth variables. For example, the size of the European silver economy is estimated to be worth €5.7 trillion by 2025 [47]. In the UK, the Office for National Statistics (ONS) [48] reported that the over-50 age group comprised 76 % of the country’s financial wealth. By 2030, over 27 % of the UK population will be over the age of 65, a group that spends around £145 billion per annum. Within that group are people with accessibility needs as well as those affected by cognitive decline. People with dementia and their carers had disposable income of £16.5K per household per annum in the UK, worth some £11 billion per annum in 2014 and expected to have increased to £23 billion by 2020 if businesses found ways to adapt and meet their needs [49], with a further rise to almost £34 billion by 2040. Yet, as Nesta [50] suggests, ‘many older adults report frustrations that companies selling products to them don’t treat them like the intelligent and discerning consumers they are ... This growing and unmet demand is creating an opportunity for innovative products and services that empower older adults to continue to lead independent lives and play an active role in society’. Similarly, Age UK [51] report that older consumers often feel marginalised and invisible, because they are not the market that businesses want to nurture.

Recognising the importance of the ageing population for governments, organisations and businesses, the Global Coalition on Aging (GCOA) established the High-Level Forum on the Silver Economy in 2019, with an inaugural conference in Helsinki in partnership with

the Finnish Government. One of the five powerful ideas promoted by this event is to reconceptualise ageing which "... requires a societal shift, led by global institutions, government, business, and individual commitments to ending ageist stereotypes" [52] in the recognition that "... ageing and longevity are transforming the landscape for business and government alike". The call for new transformative approaches is mirrored in current thinking around the world, most notably in the World Health Organisation's (WHO) Decade of Healthy Ageing initiative with a shared global focus on collaboration and action to enact transformative change, address ageist stereotyping and improve well-being. The visitor economy also has an important role to play in creating age-friendly visitor environments that serve the needs of an ageing population [53] recognising that this will become a dominant market segment. A core feature of an age-friendly environment is the need for accessibility, a focus of attention for those managing spaces and experiences in the visitor realm. While accessibility is not solely the domain of older age [54], the likelihood of having enhanced needs for mobility, sensory and other health conditions increases with older age. An accessible visitor economy is a legal requirement for public spaces and business premises across much of the world and an essential part of an industry offering hospitality to customers through an equal offer to visitors with or without a disability [55].

The ageing population has been recognised as a potential driver of economic growth [56–58] an argument that has been reinvigorated in the post-covid recovery of the visitor economy [59]. Pre-pandemic, Barclays [60] predicted growth in spending by older customers in the tourism sector. This was to be fuelled by a market of people with significant travel experience throughout their lives. Direct spending on tourism in the EU by people aged over 65 was valued at €66bn per year [61], and €109bn per year in the over-50 age group. Such figures suggest a strong economic rationale for focusing on ageing and the visitor economy to sustain and develop business activity at the same time as addressing and satisfying larger scale consumer demand brought about by population dynamics, as well as pandemic business recovery. However, the EC et al. study [62], in an evaluation of a number of sectors, identified that the tourism sector needed to review silver tourism given that not doing so may stifle demand and people may travel less. The EC et al. [63] argument was that this is not simply about marketing initiatives but requires investment in new strategic opportunities, including age-friendly destination approaches and a societal shift at a macro and micro scale. This represents an emerging ideology with significant currency in policy and strategy that embodies the adoption of age-friendly practices that recognise the ageing demographic. Age-friendly approaches are becoming pervasive in the public and voluntary sectors worldwide and can be dated to the impetus advocated by WHO [64] and a considerable body of knowledge has developed [65] adding a further justification for this study.

### 3. Framing the research problem: towards a better understanding of ageing and the visitor economy nexus

We argue that a more holistic approach to ageing that utilises concepts such as the *stages of ageing* (Fig. 1) promotes a better understanding of how ageing intersects with the visitor economy in the context of the expanding life span. This approach requires a reconnection of interdisciplinary literatures to understand ageing people's lived experiences within a visitor economy setting that does not artificially separate their world into tourism and leisure [66]. This paper posits that a degree of substitution may well occur between tourism and leisure that is better framed by embracing a more gerontological-informed approach, as advocated in other studies [67,68] but which has failed to transform the study of ageing and tourism to date. Despite a proliferation of research on tourism and ageing in recent years [see the reviews [69–71]] there is a heavy demand-side focus (e.g. the consumer) as highlighted earlier, ranging from quantitative analyses of ageing markets (see Ref. [72]), tourism preferences [73], motivations and lived experiences [74], through to specific country studies. There has been little in-depth analysis of supply-side issues (i.e. businesses) to understand organisations views on why participation in tourism activity declines with age. By framing older age as a process (Fig. 3), the aim of this paper is to examine issues that may both constrain and facilitate how an ageing population engages with the visitor economy. This paper argues that we need to move beyond conceptualising the tourism-ageing nexus through social innovation [75], arguing that the silver economy should be mainstreamed and not treated as a niche, health-oriented approach, which can appear condescending although well-intentioned. OECD [76] argued that many models of the ageing-economy nexus are outdated with older people viewed as lacking agency [77]. We investigate ageing and the visitor economy through the lens of businesses and organisations that offer travel services to ageing people including changes that have been made or are planned to business practices and services in this sector. Through qualitative interviews, we explore how visitor economy businesses and organisations may start to adapt to the needs of an ageing population to gain a deeper understanding of the factors that facilitate and constrain the activities of older people. Table 2 also

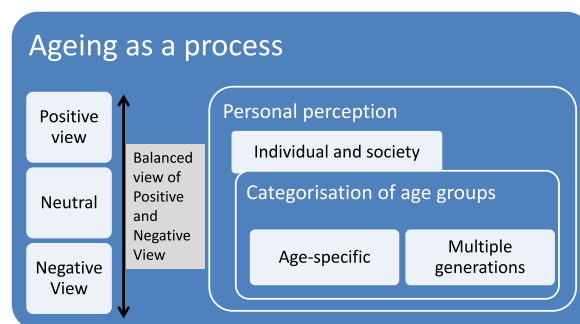


Fig. 3. Views of ageing.

**Table 2**Justification for the Study: *The research gap and contribution to knowledge.*

Current academic endeavours in examining the ageing-visitor economy nexus reveal five key reasons to undertake this study:
(1) Many of the studies of ageing and tourism tend to make assumptions about the consumer market as being homogenous in terms of the over-55 demographic, with surveys focusing almost entirely on active ageing travellers/recreationists who can be classified into segments or groups depending on their specific characteristics (e.g. Ref. [78]). The economic value of the broader ageing population is rarely acknowledged in terms of different stages of ageing.
(2) The stages of ageing as a concept are largely overlooked and numerical age tends to be used as a surrogate to describe ageing and participation (the exceptions being [79] and [14], who used the life course concept).
(3) Participation by ageing people in the wider visitor economy is premised on the argument that older people have sufficient financial resources and are time flexible, which helps to address off-peak and seasonality in time and space. This fails to understand the growing heterogeneity of people in different stages of ageing along with the impact of specific determinants of participation such as income, health or access that remain poorly understood.
(4) Barriers to participation in the visitor economy tend to be overlooked and the voices of non-participants are rarely heard leading to a failure to understand how visitor activity is either constrained or why there is limited engagement with tourism, the exception being studies of social tourism interventions directed at specific excluded groups [80].
(5) Theoretically questionable models have been adopted and promoted at a state level to engage the population with initiatives such as <i>active ageing</i> [81] and <i>healthy ageing</i> <sup>a</sup> [82,83] as a state response to ageing, which fails to engage with excluded groups. This leaves non-participation a topic that remains in the 'too hard basket' for researchers because accessing these households is problematic.

<sup>a</sup> Healthy ageing as a concept is predicated on engaging older people to participate in physical activity that is deemed to be beneficial for helping ameliorate the onset of some health problems and to benefit mental and physical health.

provides a more detailed justification for the study to illustrate the wider contribution to knowledge that the study makes.

Therefore, based on Table 2, the purpose of this study is to challenge existing thinking on the way ageing has been analysed to recognise the temporal dimensions, the life course, and the stages of ageing to better understand ageing as a process and the hard-to-reach populations who do not necessarily engage in tourism [84,85]. By understanding the complexity of the ageing population and their interactions or non-interactions with the visitor economy, the sector may be better enabled to understand, manage and plan for a shifting demographic. The implications for the individual, the visitor economy, destinations and society illustrate the challenges and opportunities that this will pose, as well as support the overwhelming case that all members of society have the fundamental right to participate in a civil society regardless of age.

The objectives of the study were to: (a) identify how ageing was perceived by respondents to understand the complexities associated with categorising people as aged; (b) understand the types of changes which businesses may need to make to accommodate an ageing population; (c) examine the challenges of communicating and working with ageing consumers and, (d) the extent to which dementia was perceived as an issue which business practices might need to better understand. The latter objective was included as dementia has emerged as a growing global challenge and is now recognised as a concern for visitor economy businesses [86]. This is because, in some countries, dementia is now the principal cause of death among the over-65 age group, displacing heart disease as the main cause of mortality [87], so the relationship between ageing and visitor behaviour is relevant for visitor-facing businesses. With these issues in mind, attention now turns to the methodology developed to approach the research problem.

#### 4. Methodology

The research was designed as an exploratory study to scope out business and organisation awareness, perception and experience of factors affecting older people's engagement with the visitor economy, particularly in terms of the distinct stages of ageing. There remains a persistent weakness in visitor economy research associated with supply-side issues [88]. The research focus has shifted towards tourism supply chain management as opposed to more business-focused assessments of experiences and interactions with facets of ageing. For this reason, the study also sought to gather evidence of the level of awareness and impact of whether business practices were age and dementia-friendly [89]. A qualitative approach was selected because the existing research on the visitor economy, in the main, had adopted a market-oriented approach [90], typically using positivist research methods to test hypotheses around ageing consumers. By examining a mixture of tourism businesses catering to the 'ageing market' and those organisations that work with older adults, typically in a third sector setting [91], it was possible to access their supply-side experiences of older residents as clients and consumers. This was deemed valuable because conventional survey methods were likely to be ineffectual in exploring the richness of experiences across different organisations. The research aimed to scope out the broad framework of how businesses and third-sector organisations perceive ageing and the implications for business strategy and operations across a wide range of providers and advisory groups. It was not the intention to provide a market report of the existence of a silver visitor economy in the context of specific countries but to explore supply-side issues at a general level to draw out commonalities. While the study started from a UK perspective, it was not intended to undertake a wholly UK-based study acknowledging the wider European initiatives on scoping the silver economy. Of less interest were country-specific issues or the limitations of a geographic perspective in favour of broader overarching aspects of how an ageing population interacts with the tourism sector. This type of approach has been adopted in other qualitative exploratory studies in tourism (e.g. sustainability of tour operators) and is not viewed as a limiting factor but as a mechanism to explore issues from a broad perspective. However, the size and geographical distribution of the sample was focused towards the UK with a number of non-UK organisations that could potentially offer a different dimension to ascertain whether the issues transcended national borders.

The research method was designed to listen to the participant by promoting an open-ended conversation through a semi-structured interview with a critical perspective of the challenges older people faced. This involved understanding ontological issues associated

with how reality is shaped by knowledge, perceptions and experiences of ageing and interactions with the visitor economy. By embedding this study in a more gerontological-focused frame of reference, conditioning factors that affect the ageing population (e.g. mobility, health, loneliness, well-being) are recognised rather than simply making generalisations about a consumer market that spans over 40 years. Such an approach, arguably, will advance knowledge and help develop more relevant conceptual and theoretical underpinnings in an area that will continue to assume a more central position in visitor economy research.

Potential participants were identified using the key informant technique (i.e. those who have access to a wide range of knowledge about their organisation or the community) to identify a range of key businesses, service providers and organisations. The sampling frame used comprised an initial scoping exercise of the Europe-wide organisations that provided travel services or advice specifically to ageing populations in both the commercial and third sector, which yielded around 200 organisations. 50 were initially contacted and 20 agreed to participate in the study. The characteristics of the participating organisations are detailed in [Appendix 1](#). The selection criteria fell into two domains: those businesses or organisations that primarily operated within a national setting and those that operated globally to provide a more international perspective. Given that the data collection took place at the height of the COVID-19 pandemic, this was deemed a reasonable response rate in view of the type and availability of participants with the knowledge and experience relevant to the study. The participants who agreed to participate were largely senior managers within their organisations ranging from Chief Executive/Director/Manager and one senior consultant. As [Appendix 1](#) shows, many of the participants had worked for over 10 years in their role, with many working longer. Participants provided informed consent in all cases and gave permission to record interviews. The interviews comprised a series of questions that promoted the opportunity to talk and explore themes and issues, which created an open and frank discussion. These questions were developed from previous studies of ageing and dementia, expanding the gerontological concepts of ageing, its meaning and the types of issues (e.g. communicating and managing older people in the visitor economy) together with more in-depth analyses of the challenges facing the visitor economy (Anon). All responses were provided assuring them of anonymity and not attributing organisational names to the responses. The range of questions ([Appendix 2](#)) illustrates the focus of each interview, which commenced with a discussion of the term ageing and then moved on to aspects of organisational practice. Areas covered included the organisation's main business, the organisational relationship with older people, perceptions of changing demands and trends, marketing and communication practices, the experience of people travelling (including multiple generation family groups), and the likely changes expected in the tourism market in the next 5–10 years. In addition, a series of questions on dementia-friendly business were included to explore knowledge of this area within the visitor economy. Participants were invited to be interviewed online but this was not always possible and so if they wished to complete a written version of the semi-structured interview schedule was designed to collect the same information. Interviews typically lasted from 45 min to an hour in duration and a total of 79,272 words were transcribed from 16 interviews and a further 6000 words from the 4 emailed surveys. Data saturation was reached with regard to the core questions with no new ideas expressed at around 17 interviews, thus undertaking further interviews was unlikely to develop the depth of knowledge any further. However, interviewing stopped at 20 interviews. The interviews took place January–March 2021.

A pragmatic approach was adopted towards the research process, seeking to develop a more international focus, as the COVID-19 pandemic had created challenges for undertaking country-specific studies with differential experiences of lockdowns in time and space, staff who were furloughed/no longer employed and organisations that had closed meaning activity in the visitor economy was suspended. By broadening the range of participants to identify key organisations in an international setting, it was possible to move beyond a single country-based study and overcome the limitations imposed by COVID-19. The organisation types comprised a major visitor attraction in England, tour operators in the UK, USA, Russia and Ukraine who work with ageing markets, a healthcare organisation, and charitable organisations that performed a policy and lobbying role nationally or globally for either a specific age-related issue (e.g. a health condition) or a charitable body with a national, regional and local remit that represents and provides services for ageing people. In total, 12 organisations in the UK, 4 in the European Union, 2 in Russia, 1 in Ukraine and 1 in USA were interviewed (see [Appendix 1](#) for the profile of participant organisations and organisational activity). All organisations were major stakeholders in tourism and leisure for older people. Unfortunately, the study was completed prior to the outbreak of the armed conflict between Russia and Ukraine so the results from these two countries need to be read in the context they were collected as opposed to the current conflict. While this data could have been removed from the dataset, it was deemed appropriate to leave it in-situ because the focus of the analysis was on broad themes across countries rather than country-specific trends and patterns, or ways of doing business in specific country contexts.

#### 4.1. Data analysis

As the study sought to gain insights and meaningful knowledge on participants' experiences, Thematic Analysis was selected as a technique, following the steps of data familiarisation, generating initial codes, searching for and reviewing themes and defining the themes [92]. The process commenced with two researchers undertaking several in-depth readings of each transcript and grouping key issues on each question [93]. Transcripts were subject to open coding based on emergent themes. Axial coding to refine groupings of issues in relation to interview narratives and confirm relationships between categories was then applied to highlight the primary issues. Selective coding was then applied to look for patterns in the data and possible connections between responses [94]. Selected codes which helped identify these themes were derived from this detailed reading of the text as opposed to using simplified key words to search for phrases or comments. From the codes, several themes were identified from the interviews which were guided by the research objectives and included: the meaning of ageing, how businesses communicated with consumers and the digital divide, the role of advertising and imagery in product and service promotion, challenges in interacting with ageing people and consumers, dementia and the visitor economy and engaging with an ageing demographic. Short quotes were extracted to provide supporting evidence of the

themes and to also represent a range of views. This follows the approach suggested by Creswell [95] and Merriam [96]. In the following section, where possible, data is presented in tabulated form as well as in the text to assist with a more granular analysis of the characteristics of the participants and their views and at length for the purposes of the peer review process.

## 5. Research findings and discussion: key themes and issues

### 5.1. Understanding the concept and meaning of ageing

The interviews commenced with a contextual question seeking to understand what the term ageing meant to participants and the organisation within which they worked. This was important because ‘age is an important part of how we see ourselves and how others see us’ [97]. In the context of this study, this question is also important as attitudes to ageing and ageism are a form of discrimination institutionalised within organisations and internalised by individuals [98,99]. There are also broader debates on the implications of ageist attitudes and how these may create negative stereotypes and imagery that impact the well-being of older people [100]. Furthermore, as Freeman et al. [101] concur, ‘throughout the course of a person’s life, beliefs about ageing are formed and shaped by personal experiences and broader societal attitudes’. This was also a useful means by which to see if participants as practitioners recognised the negative and positive perspectives towards ageism and the importance of awareness-raising of ageing among visitor economy businesses. This question created a wide range of perspectives that can be best categorised as shown in Fig. 3, which broadly concurs with the literature on how ageing is viewed. For the visitor economy, this has important implications since negative ageing stereotypes may reflect societal attitudes and need for interventions to improve practice. Viewing ageing as a process and the categorisation comments illustrate that the broader grouping of people by age belies multiple generations within the group and so through time, organisations will need to cater to and adapt their services to this more diverse range of generational needs. The views of ageing are also important in the way in which the visitor economy seeks to communicate with older people. It was evident that charities and NGOs perform an important support and advocacy role as well as supporting engagement with the visitor economy and in terms of reaching out to large numbers of older people, as illustrated by the following quotation, which highlights the diversity of the ageing population which comprises:

‘... 2 or 3 generations of age. So people of 60 are vastly different to people of 80.’ [R1].

As another respondent indicated, once policymakers recognise the value of the ageing population, it starts to raise awareness of the silver economy, where

‘the older person is also a person with purchasing power, who could create employment or drive the economy by consuming products and services. But also the need to adapt our structure of products and services to the fact that we do have larger proportion of older persons.’ [R13]

This then raises the question of how can the visitor economy learn from the experiences of these organisations to communicate and target older people?

### 5.2. Communicating with an ageing population: the digital divide

Research on ageing has seen a growing focus on how organisations have embraced technology as a tool to communicate with a greater range of people through the growth of the internet and web 2.0 [102]. As Choudrie et al. [103] observe, access to smartphones, as one example, is important in helping reduce social isolation and, for the visitor economy, it provides an accessible tool to engage more fully with different customer segments. Choudrie et al. [103] and a considerable grey literature on ageing, suggests how companies treat the over-50 age group as consumers where the interactions range from being ignored or overlooked, patronised (through inappropriate marketing/advertising), to being stereotyped with ageist imagery. Realising the potential to engage meaningfully requires businesses and organisations to understand how to communicate with the large scale of older people that comprise the silver economy.

Studies such as van Dijk [104] have questioned the equity of access to new forms of technology through both access to the means to purchase and operate devices (i.e. the cost of ongoing contracts) and then the training and expertise to use it. Van Dijk [105] refers to the ‘haves’ and ‘have nots’ of access to digital media and the growth of a digital divide between different groups in society. Research on digital divides at the European level found that of age, education, gender and income, age creates the greatest disparity in adoption of technology [106]. As the WTTC [107] highlighted, 85 % of households in developed countries had access to the internet compared to only 15 % in the developing world a feature illustrated by the following quotation:

‘... in the English-speaking world, in the Nordic countries and in Scandinavia, people, even elderly people tend to be more digitalised and more savvy and more practised. It’s harder in markets such as southern Europe, and eastern Europe, not to mention the developing countries. So there is ... a disparity, a difference in access to the internet, which is the main means we use to communicate and therefore it’s more difficult to reach people in certain countries ...’ [R14]

The digital revolution is premised on the notion that diffusion of the technology will eventually become relatively ubiquitous and yet in terms of the stages of ageing, the diverse age range means that some generations are embracing technology (e.g. the baby boomers) while others are excluded. Thus, some people may be overlooked by not having access to or usage of technology. Inequities do exist in access to information on the visitor economy offer if a large proportion of its communication is targeted through online

communication. Whilst the digital revolution has made communication through this medium mainstream for many groups, others have been bypassed by these developments. For the visitor economy, there are key points in the life cycle such as retirement, the onset of an illness or the impact of bereavement where businesses have opportunities to tailor their products and services if they can reach the market. Many of the participants outlined their reliance upon social media and the internet (e.g. email) to connect with older people who were 'connected' or were joining the digital revolution, but a range of other valid forms of communication also remained significant for these groups including: face to face contact, telephone, paper-based information, word of mouth and advertisements within the community. As the following quotation suggests, these communication forms will vary by the stages of ageing as

*'For people who have sensory impairment and that tends to be people in their 70s, so the onset of things like, for example, deafness or eyesight problems is more common in the over 70s, then you need to have more face-to-face time, you need to think more about the level and way in which you communicate ... By the time you get to people in their 90s almost always it's going to require face-to-face involvement.'* [R1].

while in the case of social media

*'... so Facebook friends you can have 700 but you don't have necessarily connection with all those people ... [but] ... as a Social Worker I have observed that three is the optimum number in a friendship, little groups of three work particularly well ... we provide free opportunities for people to get together, have exercise, have coffee, things like that where they can make their own friendships ...'* [R1]

Interestingly, the experience of a major visitor attraction was that social media was a key medium but only one of a wide range of tools they used to reach the widest possible consumer base, including the ageing consumer as:

*'... growing numbers of people that age fall into the category which I'm sure you've heard of, silver surfers, who have endorsed a) the internet, and b) certain forms of social media ... we send messages out via Facebook, and Facebook is quite a strong one in terms of getting messages through to people ... so for example when we ... couldn't open, we did that across all channels. We did it on the internet, on our website, we also did it on a mailing to people who are known supporters or people who've asked for information ... also via Twitter and via Facebook and also put stuff on Instagram as well. So we communicate with them in a variety of means but a lot of the traditional means of communication with some PR techniques.'* [R2]

Other participants re-emphasised the importance of personalised communication, for example,

*'... because we are a human service business, I think it's really important that the manager of my sites pick up the phone and talk to people.'* [R4]

reinforced by the importance of

*'face-to-face contact ... that's incredibly important, more important than ever now because so many services are not providing in-person contact. We communicate in writing, so we have lots of lovely materials that go out, often enlarged so that people can see them but really positive things that individuals can read.'* [R9]

Face-to-face and personalised contact also performed another role in breaking down social isolation and as a step towards engagement in the visitor economy as:

*'We also work in the community to support those who are the most isolated, so no friends or family, or very little social contact, to provide them with the wraparound support to improve their socialisation, and reduce the negative effects that loneliness can have ... So we communicate with people face-to-face, over the phone, via email, text message, and if it's trying to get new clients and get the word out there then that would be a targeted marketing approach based on using various different elements, targeted leaflets, targeted magazines, targeted surgeries, you know, going to places where we know they will go.'* [R10]

More specifically in terms of the digital divide, several participants referred to this either in an indirect manner without talking about the digital divide explicitly or as several participants did, directly as

*'... there is a big digital divide which we've tried to get the xxxxxx authority and other public bodies to recognise that there's a large number of people who you can't reach through the internet, you can't reach by email, and therefore you need to be doing more printed material and to do phone calls, or at least have phone lines that work for people to access information, and possibly through radio'* [R15]

and the implications for business are that:

*'... loads of people fall through the cracks, loads of people are missed and do not get that information. So there is a digital divide there, there really is a digital divide, because we can't send something out to the whole UK population of 66 million people, we just can't, you know, it would be cost prohibitive and a waste for most people. So, yeah, there is a digital divide there, and that's probably our biggest challenge'* [R3]

whilst for addressing the digital divide, a wider range of factors exist, as

*'... older people who aren't digitally literate and fear that they're being left behind ... we have to recognise that there are some older people who like don't want a smartphone or can't afford one or, you know, don't have WI-FI and indeed it's not even just a case of finances, the broadband infrastructure in XXXX is quite patchy so there are areas of the country still that don't have good WI-FI access.'* [R18]



and the most apt summary was offered:

*“It is still challenging and more difficult in COVID time, because of the digital exclusion in this group.” [R11]*

So, for organisations targeting an ageing consumer requires a greater effort than is probably expended on the under-50 demographic to position how they communicate with much harder to reach consumers given the digital divide.

### 5.3. Advertising and imagery

One of the key challenges with communicating with an ageing demographic, as Nesta [108] found relates to avoiding ageist stereotypes to portraying them in a sympathetic non-patronising manner if they want to engage people at different stages of ageing. Asking participants about how they approached this issue, a range of responses highlighted the underlying rationale for image selection and the type of imagery they used to demonstrate how they advertised their services. In the following example, the emphasis was on people as:

*‘I think [we] just use stock images. And there were so many younger people in those that it was quite alienating for our customers, who are mainly older. So we have a sprinkling of people of different ages, but most people are our demographic, which is older, older people. So, ... you are talking, 60, 65 plus ...so the images you’ll see would be older people ... it would tend to be a couple of people together. It might be family members, like somebody with their kid or grown-up kid.’ [R3]*

Other participants indicated that their emphasis was on active people and activities as:

*‘... we feature photos of people in our age demographic. We do a combination of all of the above [passive images, activities, groups, couples]: group shots, solo shots, active (like hiking) and more passive (like sitting at a table). We offer a huge range of experiences, so we have a lot to represent.’ [R6]*

*‘They’re doing an activity. We’ve got a strapline of learn, laugh, live I think, if that’s the right order, I’m not quite sure. And so it’s people enjoying activities mostly.’ [R4]*

In contrast, another participant indicated the focus in their advertising was on place as

*‘I think that first of all pictures of private beaches, private villas, really give good advertising for ageing people.’ [R8]*

These responses must be understood in a broader context of how the imagery of older people needs to be constructed and the impact it has. As Bradley and Logino [109] suggest, age is a mask that conceals a person’s identity, and many older people see themselves as younger than their calendar age (also see [110,111]). Yet advertisements with older people, according to Bradley and Logino [112], often use stereotypical images that portray older people in a negative manner that diminish the hook of the advertisement to engage the target market. Issues such as frailty or dependence as opposed to independence are conveyed which reinforces negative stereotypes. Such imagery may create a disincentive to engage with a product or service and in some instances may be deemed discriminatory. This is a clear challenge for organisations in dealing with ageing consumers and we now turn to some of these challenges in more detail.

### 5.4. Challenges in interacting with ageing people and consumers

Participants reported a wide range of issues associated with the challenges of working with ageing people and these were grouped into several themes with illustrations of each theme represented in Appendix 3. These themes illustrate that making generalisations about an ageing demographic such as the over 50, 55 or 65 age group obscures the stages of ageing that are particular to the individual as well as their personal circumstances. One participant indirectly highlighted the leisure paradox [R1] and the impact on leisure time which connected well with the issue of ageing and the future workforce requirements of the visitor economy that has begun to attract attention among researchers [e.g. see Ref. [113]] as they realise that the dependence upon a youthful workforce is changing. There are numerous strands to this debate, as Appendix 3 shows. First, as R15 suggested, ageist attitudes to recruiting ageing workers remain a consistent problem within the recruitment industry. Second, as R1 illustrated, with the removal of the compulsory retirement age in many countries and reduced pension benefits due to increased life expectancy as well as working longer through personal choice (instead of full-time retirement), more people are employed on a part-time basis. As the visitor economy has a dependence upon zero-hours contracts and part-time workers, and other sectors like the event sector which make considerable use of older volunteers, these issues are of greater significance. Conversely, working part-time or volunteering also provides a greater pressure on the available leisure time as the leisure paradox mentioned by R1 above noted.

Yet one particular issue which various studies of ageing and the future workforce requirements point to is employee well-being and health issues, particularly the growing incidence of dementia with an ageing workforce or those with caring responsibilities for people with dementia (e.g. [114,115]). Issues associated with cognitive decline and changes to work performance in a sector that is people-facing and built upon customer interactions may require greater thought to be given to how the issue is accommodated among what will potentially become a more ageing workforce. Conversely, those not working and/or those no longer in the workforce may experience issues of isolation and connection with others (as suggested by R1). Therefore, the greater connection with people through social activities built around the visitor economy may provide a greater grounding to their views and perceptions of the world to

address that isolation. This requires, as participants identified, a greater emphasis on communication with older people through digital and more traditional forms of communication at a strategic level and in operational settings as R20 highlights.

Encouraging participation also involves the provision of suitable adaptations for leisure and tourism activity in terms of holidays and day trips (R1) particularly planning for disability that has many synergies for the provision for ageing travellers. But this does not account for the groups of people excluded through poverty that impacts upon the digital divide (R17, R18) and potentially exclusionary environments such as care homes (R19) with potentially less resource deployed to the stages of crisis and end-of-life in the life cycle. Again, this reveals the diversity of needs even within one organised group of travellers (R1) where the example of someone with dementia required an elevated level of staffing and attention. One solution often advocated is the development of multi-generational holidays stimulated by filial duties as Heimtum's [116] analysis of taking holidays with ageing parents highlighted as 'filial duty thus changes across the life course. Major transitions occur when parents' health declines and when one parent dies. Death and changes in an ageing parent's health, particularly with a resultant role reversal, put extra pressure on some of the participants, who slowly felt "locked into" filial duty during holidays' [117]. Even so, as R1 illustrated, the experience of a destination may equally be exclusionary where the ageing traveller is unable to access the destination in the same way as the other people in their party. This may be compounded by other accessibility issues at specific accommodation. Alongside these requirements, attractions such as R2 acknowledged the importance of high-quality visitor infrastructure, such as toilets and cafes, as a necessary element of the product and experience.

### 5.5. Dementia and the visitor economy

With the growing significance of dementia as a major cause of death [118] as R2 suggested (Table 3) and the growing numbers of people with the condition, participants were asked about their perceptions and views of the visitor economy and how far it had transitioned towards becoming dementia-friendly, building on existing studies such as Klug et al. [119] and VisitEngland [120]. As the first stage of developing a more dementia-aware visitor economy is being aware of the issue, R10 typified many comments where there is a failure to understand the diversity of the condition. As R18 observed, the issues arose around awareness and accessing places and transport. In one instance, R19 argued that more dedicated facilities are needed to cater for this market, but the underlying perception of fear (R15) created concerns about catering for this market. Despite this, some participants did feel it was on businesses' radar (R2). Following this up by asking about how proactive the visitor economy was towards this issue, several participants pointed to the need for training and awareness-raising (Table 4) which is broadly consistent with the findings from Connell et al. [121] in their study of

**Table 3**  
Dementia and the visitor economy: Is it an issue?:

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I think there is kind of like a negative typecast around, you know, dementia, and I've seen this time and time again ... it's a complicated disease because there's so many different variants, you know, and although there are the main common types, you know, like vascular and Alzheimer's, it's still all these other variants, and we still support people with Lewy bodies, other kind of more rarer types of the disease, and so their symptoms are very different, you know, we have some that are really inhibited in terms of their behaviour so they come out with wildly inappropriate things, and that can be really shocking to somebody who's now aware [R10]
I wish that more providers could be more aware of the needs of persons with dementia and be better able to provide firstly environments that are safer but also more inclusive of persons with dementia so that, you know, that's one of the aims of the XXXX Network which is to generate this kind of sense of it's totally okay if you're in a public space to see somebody who might well be living with dementia and ... with somebody else, you know. So I think certainly we have to become much, much better at being inclusive of and sensitive to the needs of both persons with dementia themselves but also their family members or indeed ... if they have professional carers. And also recognising that ... there are differing forms of dementia and so it's not always Alzheimer's, it's not always about short-term memory loss, you know ... I think we all as a society need to become better ... not without its challenges but no ... I don't think that persons with dementia should be denied these opportunities ... as the same with ... accessing public spaces, accessing public transport and ... accessing leisure and relaxation opportunities [R18]
I don't, and that's because they don't face it. I think they will not permit or enable their markets to encourage people with dementia to join in because they can't cope with it, so it's almost a barrier. But my view is, why can't people with dementia go to a hotel by the seaside and stay there for the weekend? Why can't we have specific dementia hotels in the same way that we have specific dementia care homes, you know? Cruise ships, what's the average age of a person on a cruise ship? It must be into their 70s ... more and more people are living longer, more and more people are getting dementia, why can't we have little silo areas on a cruise ship for them to go on and enjoy? But the secret is, you need to have able bodied people with them to support and care for them ... often that can be the family member as long as they have their form of release [R19]
I think that therefore there is a great fear of it. And it's a fear not only of what they might do to themselves, but then, of course, the insurance impact on them, you know, and how expensive will it be for us to provide appropriate support? And I think that's based, as well, in a way dementia paranoia is sort of an extension of ageism, you know, to another level [R15]
I am not sure that so many people know about dementia [R12]
I think it's on everyone's radar simply because not very many attraction owners and operators are very, very young. They are usually in their 40s or 50s. The people who are at the top of the tree and the directors are 40, 50, 60 and they must be aware of it because of all of the research which is coming out whereby dementia is becoming the big killer. It's no longer heart disease which is the big killer, it's all the mental diseases, so Parkinson's ... dementia per se [R2]
I don't even think they [do] ... most people wouldn't even know what it is [R3]
for us taking people on day trips ... the people with dementia, now we have a ratio, we only take like one person with dementia to every 10 people that haven't got dementia because we're watching them in case they wander off and making sure they're having a good time and they're not anxious about where they are or if they decide to try and go home ... all of these things are things that you need to think about ... the challenge is dementia competent. But then the question is, why are you doing this, are you doing this for you or the person and sometimes it's worth accepting that the nature of the disease is such that familiarity is more comforting to someone than taking her for this trip somewhere else. It might well be that taking them to a beach or something is something that they will get great enjoyment out of but again, it's very much one-to-one and it's hard for industry perhaps to cater for that person, the 3 h on the train or the coach to get them to the seaside resort [R1]
I don't think they see it at all, I am going through the different hospitality organisations and experiences that I have seen ... I can't say I've seen any demonstration of alertness or awareness of seniors [R5]

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**Table 4**

Is the sector proactive towards dementia?

Absolutely not. The only ones I've seen is ... it's not tourism, really, but it's the entertainment industry, would be cinemas ... Could you imagine taking somebody with dementia through ... Stansted Airport, it would be an absolute nightmare. And there's no adjustments around that at the moment, it would be so overwhelming and confusing. So I think there's a lot to do, but I do think there's a market for it [R3]

You see people about taking the mental, mentally needs people to the seaside and things, you see a lot more of that than you do elderly people [R19]

I think lots of people are just too scared, you know. I think one of the most isolating things for family members of somebody living with dementia and indeed the person living with dementia can even just be at the basic level of your neighbours, that people get embarrassed about, think "oh God, she won't remember who I am, oh I know what I'll do, I'll cross the road so I don't have to meet her", you know, that kind of attitude so, and I think that's where it needs tackling. So XXXX is an initiative about ... addressing that at a community level, you know, so, and sort of, you know, to understand that dealing with someone who lives with dementia sometimes all that's needed is giving the person a little bit more time just to process what's going on [R18]

simply starting by educating your staff, if you've got ten staff and you give them awareness training on dementia, and there's so much good content out there [R5]

this café [in Australia] was entirely started by people who had a diagnosis of dementia, and didn't have anything to do with their age, some of them were quite young, but they were all dementia sufferers, and it was fantastic, the way simple hints and tips that they gave, but that was a thriving business and they advertised it was dementia-friendly, and so by people with dementia. And it was full all the time, because people do want to care, and people you know, there are millions of people who are a bit afraid that their husband or their wife has dementia and they don't take them to where they used to take them in case they embarrass themselves [R5]

we did look at this about four or five years ago, that we would provide training to companies, and we would give them an accredited mark to say that this is the kind of, this is the training accreditation that your organisation has achieved. But to roll it out on the scale that we needed to it'd just be too involved based within the resources that we had at our disposal. But ... that kind of standard I think is something that they could aspire to ... So I think they'd probably use a, once they understand the benefits of doing that, and once they're more informed maybe they can realise the value of having such an accreditation in the same way that they have like investors in people, you know, it could be that they are, you know, established dementia champions, Alzheimer's Society we also work with them, they were going to roll this out, Dementia Champions, Dementia Friends, and that has made ... steps in the right direction. But ... it wasn't enough, but I think it was decided to be quick and easy so people would just sign up to it as a gateway to learn more about dementia, so I get a strategy and I think it worked to a degree, but to move to the next level and have something more formal as a formal recognition, that they are Dementia Champions, or they are Dementia Friends, you know, that is something that needs to happen [R10]

Scotland's visitor attraction sector. With regards to the process of transitioning towards a more dementia-friendly visitor economy, R10 argued that a kitemark/training accreditation may be a way forward, which is not dissimilar to the approach by the Alzheimer's Society in creating dementia-friendly businesses [122]. A more probing question around whether their organisation or business was dementia-friendly generated an interesting series of responses from several participants who clearly separated the two stages that need to be met in becoming dementia-friendly: first, to become dementia-aware and then dementia-friendly once appropriate training had been embedded in the organisation (R19, R2, R3, R18) with other organisations wishing to pursue this direction (R15) with one (R10) being an exemplar as a lead body and provider of care and training.

To promote greater dementia awareness among visitor economy businesses, the participants were able to identify the market opportunities this offers. Table 5 identifies some of the key points, for example, a national awareness scheme was advocated (R2) along with new product development to tailor services and experiences to people with dementia and their carers (R8, R19) as well as the opportunities, such as developing off-peak season offers for this group which other studies of ageing (e.g. Ref. [123]) and dementia (e.g. Ref. [124]) have highlighted. However, one respondent (R18) highlighted the importance of approaching ageing and dementia from a different perspective – in an age-friendly manner. This was framed in terms of one country's successful Age-Friendly national programme where improvements to the built environment help everyone, not just an ageing population, when the principles of Universal Design are introduced (see Fig. 4). But how should these issues be communicated to businesses and organisations in the visitor economy?

**Table 5**

Is your organisation dementia-friendly?

I think you have to be dementia-aware in the first instance and then you adapt your organisation to be dementia-friendly. You need the awareness first, before you know how to be friendly [R19]

I think we're a mixture. We're certainly dementia-aware and I would like to think we're dementia-friendly as well [R2]

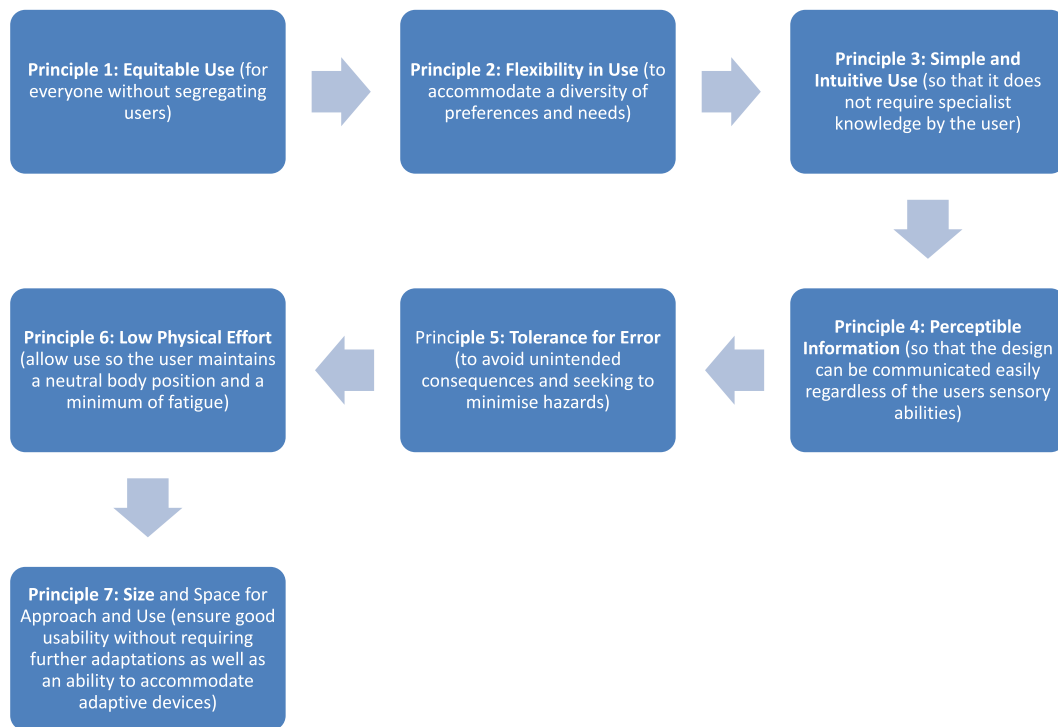
it's such an issue with an aging population. And then, although not all the staff have been trained to the same level, we do have a lot of expertise, and people know where to get the expertise from ... so definitely dementia-aware, probably dementia-friendly. But, again, we could do more and we'll need to do more as the population continues to age ... [R3]

We work with dementia travel companies. Our MD has attended dementia training with Age UK [R7]

I think so, I think we are, we're one of the lead providers for dementia support, so we provide a lot of support specifically to people with MCI and dementia and we ... work closely with Alzheimer's Society and the Admiral Nurses, and the memory clinics; we provide training on dementia, we produce literature and information on dementia, and we work with carers who look after people with dementia. So and we're on the Dementia Strategy Board, and ... we employ the strategy locally. So I think that in terms of where we're placed and what we do in the world of dementia, I think we're one of the kind of key players in terms of influencing the strategy and delivering support [R10]

to be formerly part of that dementia-friendly perspective is something that we want to do, but we can't do it until after Covid. I was affected by the fact that I met the Head of Campaigning for Dementia UK and was very impressed by the toolbox that they ran in the training, and their whole thing about getting a million champions, and I'd like to take that to the next level. But we can't do anything, really, until Covid has finished [R15]

We certainly strive to be very dementia-aware ... it's not our niche market at all, it's not our niche population that we work with but, and I guess one of our messages is challenging the stereotype that older age means dementia ... [R18]



**Fig. 4.** Principles of Universal Design

Source: Developed and simplified from the Centre for Universal Design <http://universaldesign.ie>.

### 5.6. Engaging with an ageing demographic

Table 6 outlines a number of the responses on this issue. As R3 illustrated, many of the baby boomers have a considerable social capital built up in previous experience of travel and so the expectation to be able to travel exists already. Some participants (R2) highlighted that this was good business practice to recognise people as revenue, with precise market opportunity data (R19, R7, R9) as illustrated earlier in the paper by CEBR [125] and VisitEngland [126] to reach the business sector. Who should promote this was seen as a joint responsibility of the public sector and trade bodies, through partnership working (R6), a feature which Connell and Page [127] highlighted in terms of the dementia-readiness of visitor destinations which might be accompanied by tax incentives to embed this in business practice.

Asked about the likely future development of ageing as a major theme for the visitor economy, several participants identified the immediate opportunities which the ageing market offered to a post-COVID recovery as untapped potential in line with the Barclays [128] report. Other participants recognised the growing scale of the ageing market in the next 5–10 years (R8, R14) and in the case of dementia, the demand for short breaks could expand (R1) (Table 7).

## 6. Implications for managing ageing and the silver visitor economy

It is evident from the depth of the interviews and themes that emerged that the stages of ageing provide an important framework in which to examine the implications of ageing for managing the visitor economy. If one extrapolates the stages of ageing and draws together some of the strands from the published literature and the participants' views, it is possible to draw a number of implications for the silver visitor economy. First, from the perspective of remaining *independent*, developing Universal Design principles in visitor environments will help to help older people maintain independence and access in both leisure and tourism environments, as highlighted by AARP [129]. There is an important crossover between two paradigms that could contribute to this greater independence, namely the dementia-friendly and age-friendly practices [130]. Unfortunately, there is no integrative framework or clear connection between these two separate movements to combine and focus their efforts in destinations and localities to advocate a more age-informed approach.

Both of these movements promote the need for audits of visitor environments to ensure their principles are implemented as suitable adaptations (e.g. step-free access), which in many cases are very similar. In the case of age-friendly programmes, there is some evidence globally that these are beginning to embed in leisure settings such as parks, open spaces and urban environments [131,132] and local neighbourhoods. However, we are at an embryonic stage of creating age-friendly environments for the visitor economy with Universal Design principles at the heart of the agenda. The significance of these debates is that these represent much larger societal and community agendas that are beginning to influence the visitor economy to help promote greater independence among an ageing

**Table 6**

How to communicate this issue to businesses?

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it's a case of getting people on side ... they are a form of revenue, that's what businesses are always interested in, but also it's part of their social care responsibilities ... You feel far better as a business knowing that you can and want to welcome people in that way and it's also very good PR value as well showing that you are able to do that. It just needs to be communicated [R2]

I think you've got to sell it on, it's within the context of age as well, you've got to say, "This is the number of people who could take up your offers. This is the amount of money that they've got available to spend. These are the limitations that they're currently facing and the frustrations they're facing. These are the myths that you need to overcome if you're going to have a decent business and marketing plan. And if you get in there first, mate, you're going to make a killing. Whereas, if you stay on the outside you're going to watch as a key market grows and you don't". And at the moment, I think hospitality is going to be, and tourism is going to be really, really looking for every possible way they can maximise their income given what's happened to them over the last year. So they should be in a more, you know, open minded, susceptible approach. That said, a lot of the chief executives in the, and ... middle managers are young core age group, late 20s, in their 30s, and it's very difficult changing those ingrained perspectives [R15]

some of it's got to be Government-led and also probably through some of the trade bodies, just to think of this as an opportunity ... so it's trying to show that there's an economic case as well as a human case. [R3]

think if you gave a tax incentive to a business where they could demonstrate that they've given education on a yearly basis to all their crew on dementia awareness, and that took 0.5 % of a tax amount of whatever, I think you would find it very, very well taken up ... the need to push dementia-awareness, and dementia-acceptance, and with some financial support, and I don't think it needs to be large amounts to get people onboard [R5]

Partnering with organisations that have that experience [R6]

By pointing out the financial benefits to the companies [R7]

we've got to be clear about how it relates to them ... some people in those businesses might have direct personal experience which helps, and I think that Alzheimer's Society do a fantastic job in some of their communications, but I think it's got to be really sold on the basis that this is how it affects you, this is why ... you've got to get invested in this. And I don't think that's easy to do because it's so different, like so for instance banking, before Covid when people used to go into bank branches, they should really be primed and trained to recognise dementia and be aware of it, more formally, because you know, a lot of the people that they are becoming, that are coming in, that may forget their details, or may struggle, they may be experiencing the early stages of dementia, or cognitive impairment [R9]

Well I think an awareness that something as simple as ... if you're the till operator and somebody seems to be a bit slower ... this may well be somebody living with dementia and give the person time ... if you encounter somebody who maybe might be looking at bit lost for instance, let's just say a shopping mall or on a street, I think very often the first instinct is to call the police as a way of helping, whereas that might end up being a very frightening experience for the person living with dementia, whereas if more of us could literally just say "right, I'm going to just stay here with you for 10 min and see, you know, for instance if you are able to respond to the situation or is there somebody I can call, you know, like a family member ... ?" I think it could be something quite basic [R18]

I think you have to develop your strategy and what you mean by dementia-friendly. Because there's a flipside to this, if you say you're dementia-friendly, then you may discard people from joining your travel company or whatever it is, because they don't want to be with people with dementia. So I think you have to be very careful and promote that that's something you can provide. But at the same time, you can also provide non-dementia needs. So you can't flip it from one to the other because you might put people off. But I think they have to develop and initiate products or activities or care that will look after specific needs, and then promote that accordingly [R19]

I think it's ... down to the training of the staff. I mean I'm sure you've had bad experiences in hotels or receptionists or cleaners or whatever and it, so can you imagine that for somebody with any sort of disability, how they would feel? So it's about the training but it's not just about the training about that one person on reception, it's about training the whole staff down to the cleaner. Absolutely. It's everybody and it's about the ethos of the management and it's about just thinking about that person could be your grandma, your granddad, think how they would feel. It's about getting back to the very basics of ... they've come on holiday, it's the first holiday they might have had for a number of years and we want to make it special, and there might be some challenges but it's really about awareness and understanding, and training [R20]

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**Table 7**

Impact of covid and future for ageing consumers five years ahead post-covid.

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Well if they're smart they will recognise that what people, or most age groups are experiencing during coronavirus and these years is loneliness, the social isolation. And if they are smart they will focus on the sociability of their product, of their tourism event, whatever it is, how people can re-join the human race [R5]

I think everything will change in five and ten years ... we've got more online opportunities to order special services for our tourist ... market [which] will be adapting much more to the ageing groups [R8]

we're seeing, for example, early onset frailty among the people that we're looking after, there's less interest in diet, they're certainly not taking any exercise and mentally they're less stimulated. So I do think we will have, for example, some people perhaps with worse health [R1]

So although people with dementia are often physically fit, they're easily disorientated in new places and certainly people do live longer with dementia ... than they were doing in the past ... I think for actual hotel, you know, going away for a week for 10 days, something like that, demand is not likely to increase dramatically, mainly because older people ... they don't feel comfortable going away for a really long time, they want their own beds, they've got aches and pains, they've got various medical appointments to be attending but I think ... the short break market has some potential [R1]

People have expectations about still being able to travel. You know, people who are going to be 75, 80, 85, ... they have the confidence to do it, they're a generation that is used to travel. And so I think there will be an expectation. And, I think ... [with] equality legislation, people expect to have the adjustments in place, the right support in place. I think we've always got an ever growing customer expectation, it runs ahead, every single year ... And I think, actually, probably, you know, with the current recession, which I know is coronavirus-related, you know, probably people of working age and younger people are going to have less money to travel. So probably [the] tourism sector is going to actually want to target people who haven't been really badly economically impacted through this. And that's going to be people who are retired, on pensions, may have built up more savings [R3]

if you're going to be attractive to older people, I think you have to have a wide range of options. So, from ... self-catering ... to people doing package holidays ... I think it's an enormous growth opportunity and it should be something that should be done in partnership between, I think, the travel industry, people like Airbnb, but also government agencies, to try and specifically target older people. But, if you're going to do that, then it's down to the public sector to be providing inclusive facilities. So an absolutely key one whenever you have any conference with older people is, are there accessible, cle3Wan, safe toilets? Because being able to go to the toilet if they're going on long walks, you need to have that facility. Are the ways you can walk or cycle, are they safe and are they looked after? [R14]

I think people will be more accepting of dementia and ... environments may be built that are more dementia-friendly and more inclusive within the neighbourhood. And some countries already do that ... But people are now coming to accept dementia for what it is, and I think we will make things more integrated as people know how to, and will learn how to react with somebody that has got dementia. So I think we might see a bit more integration [R19]

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demographic. The practical implications for the visitor economy are in how some localities (and thereby destinations) have attempted to create age-friendly business schemes [133–135] to engage the ageing visitor. But these are based on a checklist model of compliance with acceptance into a scheme badged at the business premises. This is still somewhat ad hoc in its geographical distribution in countries with each locality pursuing its own agenda as opposed to a national scheme with uniformly agreed benchmarks on age-friendly business practices. In some cases, dementia-friendly sits alongside these schemes or is a surrogate for being more age-friendly but further research is needed on the interconnections between these schemes [136]. Ensuring channels of communication for these developments and products and experiences are communicated remains important, especially where poverty limits the range of opportunities for socialising in the local visitor economy.

Second, the stage of *interdependence* seems to have been overlooked in the visitor economy, exemplified by the case of dementia where carers and people with dementia are one important market among many other situations where illness creates a growing interdependence. Yet in the initial stages of dementia, minor adaptations and improved marketing, communication and awareness training for businesses may yield greater market opportunities. But as one respondent reported in the case of sight loss, grouping all the people in one hotel with people of the same conditions was not mainstreaming provision and permitting access based on wider choice. Third, in the case of *growing dependence*, improved planning, with greater recognition and support for third sector organisations would certainly help with their inroads into leisure and holiday trips for groups that have a growing range of dependencies arising from poor mobility, cognitive decline and other conditions that have remained under the radar. It remains a market that has largely been characterised in Europe by coach holidays with an organised itinerary. Addressing social and potentially mental health issues by using leisure and tourism to address the growing social isolation that some older people face, as indicated by participants, has an important cost-benefit payback by reducing interactions with healthcare settings for non-health needs. It is at this point that many cases of

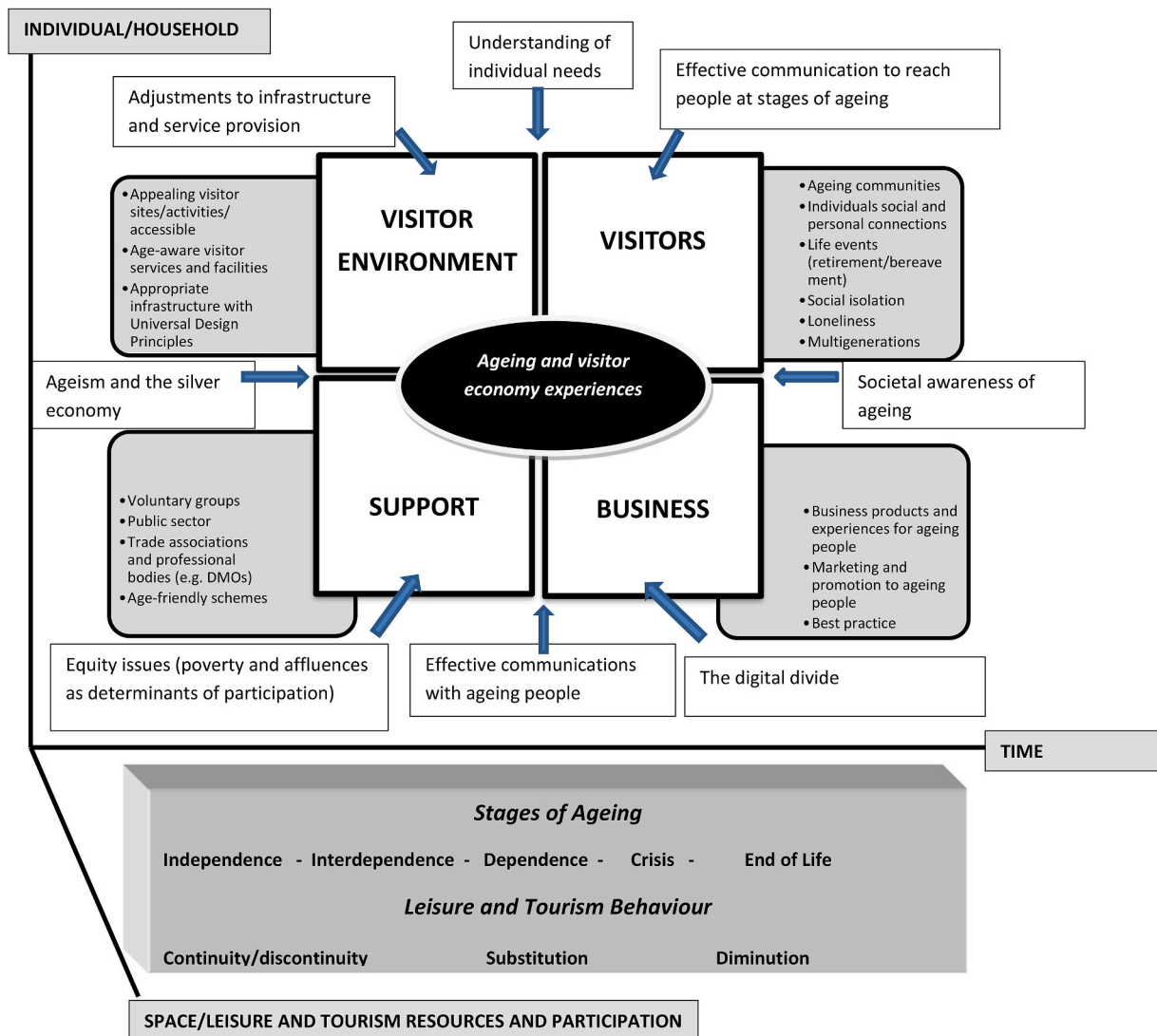


Fig. 5. Themes associated with the ageing-visitor economy nexus

tourism substitution may occur, especially where a partner has died or family is no longer nearby, with many third sector organisations providing greater levels of support to ageing people in these settings. Developments such as linking the visitor economy more clearly to social prescribing through signposting opportunities, especially as frailty and health conditions increase dependence [137] may promote enhanced well-being [138]. Effective social prescribing may help to prolong the dependence stage with appropriate support mechanisms by enabling people to live at home longer. The fourth stage, that of *crisis* where dependence transitions into an inability to remain independent at home with assistance, often triggers the myriad of public and third sector organisations to look at the most suitable options from sheltered accommodation to 24-h care in an institutionalised setting (e.g. care home). Whilst tourism and leisure in these settings are largely overlooked, as the interviews demonstrated and other studies confirm [139,140], leisure lives are not completely removed but diminish, although as one respondent noted, cost pressures had seen this activity restricted in recent years in care settings. Whilst tourism is potentially substituted by leisure at this point, the extent of leisure and the nature of the interactions with the visitor economy remain unclear but may still have potentially valuable relationships to be nurtured. In the final stages – *end of life*, some studies have highlighted a trend towards assisted suicide overseas or death in hotels [141]. Whilst death remains a largely taboo subject, as a rite of passage and for the visitor economy, it represents an opportunity where funerals and wakes are a celebration of life within a commercialised setting and indirectly it induces leisure and tourist travel to attend the event. Visiting cemeteries and sites of burials is also a significant activity and a trend which developed after the First World War with Thomas Cook offering battlefield tours to visit such locations [142] and now expanded with a focus on celebrities and fandom.

Analysis of the interview data created several themes as illustrated in Fig. 5 that correspond with the stages of ageing and the market opportunities that ageing will offer the silver visitor economy. Fig. 5 seeks to simplify the complex amalgam of themes, where the focus is on the various interconnected themes that will help create visitor economy experiences across the stages of ageing. Whilst some themes indicate the types of actions needed by businesses to overcome divisive societal trends (e.g. ageism, effective communication to all groups) the four quadrants that intersect with the visitor economy (visitor environments, the potential and actual visitors, businesses and their experiences and support from within and outside of the visitor economy) demonstrates the challenge of making a step change towards the agendas raised by ageing. Recognising the various stages of ageing as opposed to calendar age approaches and the life course helps us to begin to understand that ageing is going to require a major rethink around how the visitor economy reaches out to its potential customer base, what it offers and how it communicates an offer tailored to specific needs. It is also going to require age-friendly schemes now in development globally to connect with the visitor economy if it is to move away from a dependence upon the active ‘independent’ ageing traveller and those for whom current access arrangements encourages participation [143].

## 7. Conclusion

This study challenges thinking on how ageing is conceptualised, based on the views of businesses and organisations in the visitor economy, by introducing the notion of the stages of ageing. By introducing and adopting a more multidisciplinary approach inspired by gerontological research the paper places ageing centre stage as a principal challenge for the visitor economy. It helps validate the scope and scale of the ageing challenge that will affect business. In terms of the objectives of the paper, for the first objective, we have indicated that ageing is viewed in a wide range of ways by the participants and so the stage of ageing helps to add more clarity in categorising older people as a demographic. For the second objective, we identified the types of changes which businesses may need to make to accommodate an ageing population, with a clearer alignment to the different stages of ageing and the opportunities this may offer. For the third objective, we highlighted the major challenge for businesses in the medium used to communicate and engage with ageing consumers. For the fourth objective, we identified the underlying engagement narrative for groups with special needs such as those with sight loss and dementia and how they are perceived and the types of changes to business practices that may be required. At the same time we highlighted tensions in how the public and third sector may help broker these changes due to the competing policy frameworks of dementia-friendly and age-friendly.

From the results and discussion, we have demonstrated that ageing spans a broad range of perspectives and as this is a largely exploratory study, it identified a number of operational and strategic issues that communities and destinations will need to understand. The interconnections are summarised in Fig. 5. By adopting the visitor economy paradigm, we have shown that tourism and leisure are interconnected within the lens of ageing and further research needs to explore the continuity/discontinuity [144,145] substitution and diminution model from the perspective of consumers. The study challenges assumptions about digital technology as the panacea to connect with an ageing demographic compared to younger generations. Adopting an ageist approach which allocates anyone over 65 to this demographic simply reinforces the issues which the Barclays [146] report acknowledged in the failure to understand the silver economy.

The example of dementia demonstrates how one theme within this heterogeneous demographic is not being adequately served by the visitor economy and this may well be multiplied by each other health condition that is situated in the interdependence or dependence stage [147]. Not only are societal attitudes still demonstrating ongoing signs of ageism, which training and education will need to address as society ages further, but the visitor economy is recognised as a key potential contributor to breaking down social isolation and loneliness for ageing people as it facilitates human interactions [148,149]. The leisure paradox is also being refined as people work past normal retirement age with consequences for how businesses understand the early stage of retirement. The notion of social prescribing [150] and the visitor economy may well prove to be a fruitful line for further inquiry as studies on mental health, positive psychology and the value of holidays in reducing depression and anxiety among an older population could certainly be a testbed for seeing the visitor economy developing a more mainstream contribution to quality of life rather than as a short-term hedonistic activity. This is likely to offer future opportunities for the creation of social enterprises [151,152] to create business opportunities to target ageing people to help them age and live well, especially if they can help overcome the major challenge of loneliness in older age [153–157], which is an under-researched feature of the visitor economy. This may also help businesses realise

the hidden potential of the ageing demographic throughout the different stages of ageing with its economic potential, helping overcome the leisure paradox and engaging a wider section of society to overcome societal marginalisation. The visitor economy businesses are often located in landscapes and sites, such as blue or green spaces, which are perceived or can be constructed as therapeutic landscapes [158], a feature that is often overlooked by visitor economy businesses.

The study also acknowledges how older age groups may be more challenging to reach, as well as identifying an underexplored area - how the third sector operates with the visitor economy, expanding upon Turner et al. [159]. As the study was conducted during a lockdown, with furlough schemes and closure of businesses, we adopted a broad sampling frame to ensure that the study was not entirely based on the experience of one country. The paper does have some limitations in this sense as it was not possible to approach a larger pool of operators for interview at a time when businesses were not running to operational norms. In an attempt to view the topic through a wider lens, some biases in the range of countries we were able to access are acknowledged. Nevertheless, thematic analysis identified a reasonable degree of consistency in the way older people as tourists were viewed across countries. As this was only a scoping study, a more wide-ranging quantitative study examining the themes developed in this study in a transnational context, may help strengthen the findings and their wider implications. Furthermore, studies at a nation specific level would help to tease out the distinctive qualities of particular markets within demographic, business and consumer contexts.

Despite these limitations, it is clear from the analysis of future perspectives of ageing that there is considerable scope for market development but the nuances and needs of specific groups need to be understood as well as their commercial value alongside their infrastructure and service needs. For businesses, there is a considerable spending potential to harness or unlock and this may be best achieved through examples of best practice where visitor economy businesses have been successful in this area. As one participant noted with a café in Australia, its success in the dementia market offered useful learning experiences. One of the usual tools which trade associations or tourism bodies use are best practice guides to communicate the issues and success stories which can be informed by academic research and collaborative projects that cross-cut the industry-education-policy barriers through effective partnership working.

Whilst many countries have specific strategies on ageing, and programmes on healthy ageing, the connection with the visitor economy is often missing as is the mechanism by which hard-to-reach groups of older people are engaged with these programmes. A further weakness is that project funding for such initiatives may only run for a time-limited period. But as a positive paradigm of living well in older age gathers momentum, the visitor economy will have a far more pivotal role to play in state agendas on ageing. At a community level, the work of third sector organisations that focus on the needs of the elderly also has an untapped potential in helping the visitor economy reach people and understand the challenges and opportunities that different stages of ageing proffer [78–80]. This offers many rich directions for future research in how these stages of ageing are further developed to create a more critical analysis of the ageing-visitor economy nexus informed by more gerontological knowledge and thinking [81–83]. As an exploratory study, it is certainly apposite to endorse and reiterate the agenda that Sedgley et al. [160] put forward on ageing and tourism, to broaden the leisure-tourism connection so we understand more fully how ageing interconnects with the visitor economy now and in the future.

#### Data availability statement

participants did not consent to transcripts being shared publicly so supporting data is not available.

#### CRediT authorship contribution statement

**Joanne Connell:** Writing – review & editing, Writing – original draft, Conceptualization. **Stephen J. Page:** Writing – original draft, Supervision, Resources, Project administration, Methodology, Formal analysis, Conceptualization. **Tetiana Hill:** Writing – review & editing, Investigation.

#### Declaration of competing interest

The authors declare the following financial interests/personal relationships which may be considered as potential competing interests: The corresponding author (Professor J. Connell) is a serving Associate Editor for Heliyon the journal to which the paper was submitted. The authors declare that they have no known competing financial interests or personal relationships that could have appeared to influence the work reported in this paper.

#### Appendix 1. Organisation purpose and involvement with older people

Respondent Number	Years working with organisation	Organisation type	Purpose	Interactions with ageing people	Geographical coverage of provision of service/business
1	15	Charity	To provide services to maintain independence in older age and quality of life including provision of leisure and tourism activities to promote and help	Organising events and provision of services to promote their objectives of having something meaningful to do,	Major city in UK

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Respondent Number	Years working with organisation	Organisation type	Purpose	Interactions with ageing people	Geographical coverage of provision of service/business
			build friendship, relationships and social interaction with a wider community as between 1:3 to 1:5 of the older clients have no children. Also to ensure the home is a safe and pleasurable place to be.	someone to love and care for and/or something to love and care for.	
2	40	Major heritage visitor attraction	Provision of visitor services to all groups in the visitor economy with 100,000 plus visitors a year and £500 million business.	General visitor profile or specific organised groups with a strong appeal to nostalgia and 15–20 % of businesses focused on older age groups.	UK/International
3	10	Charity focused on single issue	Promoting the needs of partially sighted or visually impaired and provision of services to those in need and advice. 1:5 people over the age of 75 and 1:2 over age 90 suffer sight loss which leads to the daily activities and world of the individual shrinking creating social isolation.	80–85 % of their time spent on these issues. Support to travel and remain active as well as providing advice on adaptations in the home to remain socially engaged.	UK
4	4	Charity	Self-help learning for older people.	Engagement with older people around lifelong learning	Global
5	15	Charity	Improving the quality of life of older people	Sharing best practice as a professional body.	Global
6	20	Not for profit social enterprise	Provision of holidays and tours for over 50 age group with an educational focus.	Sales, guiding and tourism provision.	Global
7	10	Tourism business	Travel website with recommendations on products/services for over-50 age group.	Through website. holidays guides, blogs, social media, magazines, online links to recommended sites (e.g. 35 specially trained travel agents).	Global
8	12	Tour operator	Largest tour operator in country of operation with over 2000 employees and 1200 guides with holidays provided at a domestic level or in 30 destination countries overseas.	Mass tourism operator with a focus on older age outbound markets in its product portfolio.	Global
9	8	Charity	Independent living company.	Older age group (typically over 80 years of age) comprising around 15,000 customers.	Region of the UK
10	10	Charity	To provide services to maintain independence in older age and quality of life including provision of leisure and tourism activities to promote and help build friendship, relationships and social interaction with a wider community as between 1:3 to 1:5 of the older clients have no children. Also to ensure the home is a safe and pleasurable place to be.	Organising events and provision of services to promote their objectives of having something meaningful to do, someone to love and care for and/or something to love and care for.	County-region in UK
11	10	Non-governmental organisation	Focus on intergenerational integration for the ageing population within their communities and to develop their capacity and to promote healthy ageing and educational activities related to “silver tourism” and age-friendly environments, accessible and inclusive tourism products for ageing population.	Empowerment and engagement of ageing people through advocacy.	Country-based focus with global subsidiaries
12	22	Non-governmental organisation	Activities based on 2000 volunteers in their network to pursue advocacy, home care, training sessions and promoting the voices of older citizens.	Principles of self-help and mutual assistance to support the social needs of an ageing population.	Country-based with regional hubs
13	Not available	Non-governmental organisation	Promotes the interests of older persons, of persons as they age, their rights to ensure they have access to the same human and fundamental rights as anyone else.	Addressing societal attitudes and employment issues, social protection, health and long-term care systems and accessibility and the intersection with disability	Country-based
14	7	Charity focused on single issue	The medical condition the charity focuses on is not specifically targeted at older people but the condition largely affects older people	Four specific organisational objectives: to gets the right information at the right time during their journey with the condition; advocacy for healthcare for the condition and its complexities; raise awareness of the impact at an individual	European

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Respondent Number	Years working with organisation	Organisation type	Purpose	Interactions with ageing people	Geographical coverage of provision of service/business
15	20	Charity	Support organisation for people over 50 seeking employment as in the UK they are over 1.2. million over 50 year olds working in the UK; also Chair of a Positive Ageing organisation.	and societal level; support the search for a cure. Helping to overcome ageism in the workplace.	UK
16	21		Runs a volunteer home-care programme in a major city and also operates a network of local and regional NGOs providing information and support to people in later life.	Via volunteers.	Russia
17	10	Non-governmental organisation	An association of professional-based volunteers (e.g. entrepreneurs, company directors or managers) of companies. 1-5-20 % of activity is focused on ageing people.	Provision of training, volunteers and assistance to ageing people to enhance their quality of life (e.g. reducing social isolation) and effects of poverty and poor health.	Spain
18	21	Charity	Promotes participation by older people in all aspects of society focused on: physical activity, arts and culture; lifelong learning and active citizenship. Also challenges the negative imagery and associations of ageism and ageist thoughts and beliefs,	Via a range of programmes.	UK
19	25	Healthcare organisation	Operates 30 plus care homes across the UK.	Via residents.	UK
20	11	Commercial arm of a major ageing charity	Provision of products and services to ageing people.	Via client list, brochures and other contacts.	UK

## Appendix 2

### “Ageing and tourism”

#### Brief.

Thank you once again for agreeing to participate in this study. This is a collaborative project between the XXXXX and XXXXX universities aimed at surveying a range of tourism-related stakeholders to understand how businesses are adapting and evolving to the greater proportion of customers who are now over the age of 55 and what specific changes they are making within the business practices and activities.

Your participation will involve completion of a survey, which is expected to take approximately 25–30 min. The survey requires you to provide your honest opinions on ageing and tourism, as well as to share your experiences of interacting with and creating business opportunities for an increasingly ageing population as consumers.

Once you have completed the survey, please save it and send it back to the following e-mail address:

For the sake of confidentiality, please send the completed survey to this e-mail address only.

As a reminder, all information you provide will be strictly confidential and will only be reported in aggregated form in academic publications. Although on the next page you are asked to provide your biographical information, it will be removed from the survey prior to data processing. This means that you can withdraw your data from the study up to seven days after the completion of the survey, without giving us any reason, after which time the data will be fully anonymised. The research team will be the only personnel with access to the completed survey, which will be stored in a secure location.

You will receive a gift voucher after completing the survey and sending it back to the study researcher.

If you would like further information about this project, please contact the project principal investigators:

Thank you for your participation.

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Name:  
 Gender:  
 Date of birth:  
 Business/Organisation name:  
 Current position in organisation:  
 Number of years working in organisation:

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Below is a collection of questions asking you to provide your honest opinions on ageing and tourism, as well as to share your experiences of interacting with and creating business opportunities for an increasingly ageing population as consumers. **Please answer**

**all the questions.** If a question does not apply, please type “not applicable” or “N/A” in the space.

Part I. Ageing and tourism
<b>1. On a personal level, what is your immediate response to the term “ageing”?</b>
<b>2. What is the main focus of your company’s business (If selling packages – what type of packages – escorted, self-organised, self-arranged)?</b>
<b>3. How are the tourism products/services you offer targeted at ageing travellers?</b>
<b>4. Approximately what proportion of your business is focused on ageing consumers?</b>
<b>5. How has the demand for products and services you provide changed in the last 5 years (excluding any effects from the COVID19 virus)?</b>
<b>6. How do you communicate to consumers over the age of 55? Has this changed significantly with the rise of social media?</b>
<b>7. Do people aged over 55 feature prominently in your advertising of products? If so, how? What type of imagery do you tend to use (e.g. passive images, activities, groups, couples etc.)?</b>
<b>8. What are the challenges for your organisation of working with more ageing consumers? Do they consume more of your time in terms of specific requirements and so add more cost to your operations? If so, can you list any specific examples?</b>
<b>9. Are there any specific adaptations, services or needs, which you have to tailor for with this group? If so, can you outline some examples?</b>

<b>10. Does your organisation have any experience of ageing consumers travelling with people from other generations in their family (e.g. children and grandchildren)?</b>
<b>11. Do you place any restrictions on ageing travellers being required to disclose specific or multiple health conditions that could impact upon the experience of a holiday? If so, how is this managed?</b>
<b>12. What type of information do you provide to help people travel who have specific needs with a) a disability, b) a cognitive and mental issue such as dementia, c) autism and other special needs?</b>
<b>13. In your product range, do you promote activities and exercise among the holiday experiences you offer?</b>
<b>14. Have you encountered any initiatives or organisations that seek to expand awareness of ageing? If so, can you outline the types of interactions you have had?</b>
<b>15. Can you please look into the future to 5- 10 years away: How do you think the market for ageing tourism products will change? Will technology play a greater role in the way ageing consumers interact with your organisation?</b>
<b>Part II. Dementia and tourism and hospitality businesses</b>
<b>16. Do you think the tourism and hospitality sector sees dementia as an issue? Why do you think that?</b>
<b>17. If you responded “yes” to the previous question, do you think that the tourism and hospitality sector is proactive in developing dementia-friendly initiatives compared with other sectors? If no, do you think it should be doing better? Why?</b>

. (continued).

<b>Part III. Your business / organisation</b>
18. Would you say that your business / organisation is <i>dementia-aware</i> (i.e. understands that some customers may be living with dementia) or <i>dementia-friendly</i> ? (i.e. has taken steps to address the needs of customers living with dementia).
19. What do you think makes your business dementia aware/friendly? What steps have you taken in your business?
20. If you cannot say that organisation is dementia aware/friendly, is it something you are thinking about doing? Or something you do not really think applies to your business?
-
21. Do you feel there might be market opportunities for businesses that become dementia-friendly? Through enhanced customer service? Other aspects?
22. How do you think dementia-friendly initiatives might be better communicated to business?

. (continued).

Thank you very for taking you time to complete this survey. Please save it and send it back to the following e-mail address.

**Appendix 3. Challenges faced by organisations in interacting with older people**

Theme	Illustration from interviews
Workforce	<p><i>there's several generations in there, from people that are sort of active and retired through to people that have been retired 10 years and maybe a little bit out of touch or maybe they still work part-time because again, ageing is changing, in the last ... With the increase on retirement age, it made a dramatic increase in the way that people's lives changed. So something like 1 in 10 people in their early 70s still works part-time and that's extraordinary because that keeps them more connected to the outside world and that might well have impact down the line in a pre-Covid world [R1]</i></p> <p><i>a lot of the recruitment companies are really fundamentally structurally ageist, they're run by people in their late 20s and early 30s, who are overtly and illegally ageist in the way they prioritise people [R15]</i></p>

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Theme	Illustration from interviews
Leisure paradox	<i>So I'll give you another case in point, for example, and again this is about leisure so going back to addressing the point about leisure, those people who are still part-time working have less leisure so those people in their early 70s now who are impacted by later working don't have as many opportunities, yeah, but the people who are properly and fully retired often have the leisure but not the income necessarily to support doing the things they want [R1]</i>
Isolation and connecting with people	<i>for people who have retired and they're out of the workforce and they're perhaps not volunteering, they're perhaps more at home, the world is a scarier place because they're getting a lot of their messages through the television and radio and newspaper, you know, don't trust young people, foreigners are taking over the world and you know, everything is doom and gloom and despondency and it's very frightening and they can become quite reactionary in their views, they become quite afraid [R1]</i>
Leisure, tourism and accessibility	<i>In terms of addressing the differences, the main thing is physical disability or cognitive impairment. So for the very elderly group on the bus, you know, we repeated the question about 5 times for them to take on board, what am I being asked, I can't hear her properly, what is she saying, you know, I'm looking out of the bus window, it was harder for them to acknowledge, oh, there's the Tower of London, you know, what am I looking at, I can't see it, you know, and they couldn't go upstairs on the bus whereas people in their 60s could go upstairs and enjoy the view from the roof, you know, so just even that simple example. Sometimes we organise holidays and we do it through like coach operators and people like this and again, it has to be very age appropriate, the older they are the more you have to think about the steps, you know, you have to think about en-suite bathrooms, you know, you have to think about the location, is there a hill, is there not a hill, all of these things matter much more as people, you know, it's exactly the same considerations as for disability. You have to think about things like relative insurance, you know, your procedures if someone, I mean, as has happened to us, dies on the tour. We had one tour where a lady died and as you can imagine, you know, it's a four day holiday, Day 2 someone is found dead in the bed, you know, for everyone else how do you recover the holiday from that. These things happen for any age group but it's not normally a risk as it is for the older adult, you know, so ... [R1] you have to invest in your product knowing what your market is and catering for them accordingly with food and also with level access ... a lot of the coach people who book you've got no idea who they are when they book, the operators tell us this, and you don't know how ambulant or otherwise they may be, so we have to be flexible in that regard [R2] I think it is the route to communication. You know, as I said, it's getting easier with email, Facebook, websites for the digital age. But for people who aren't, that is really the problem, that is really difficult [R3] sometimes it can be other family members, so you have to be really careful that an older person is very dependent and they get upset if you talk over them or it's a bit like say a disabled person sat in a wheelchair and they always say people always talk to the person pushing the wheelchair or don't look at them in the eye, it's a similar sort of thing that sometimes the family take over because they think they know what's best for that older person [R20]</i>
Communicating with the market	<i>I would say half of the people that we get who are digitally excluded, are digitally excluded because of money. They know how to use a phone, they know how to use their computer, but they just don't have the money to get an upgrade or they don't have the money to get a decent contract that will allow them to access it. [R17] I think it's very easy to forget that Ireland was a very poor country ... so for many older persons who like, you know, were adults during that period of time there wasn't the money for what would have been regarded as say the luxury of participating in the arts, ...to create these opportunities for older persons which may be the first time in their lives that they've had the time and the opportunity to partake [R18]</i>
Poverty and access to technology/opportunities	<i>if I go back ten years, most care homes had their own minibus, where they would take residents out for the day. It could be to the seaside or to a garden centre or whatever. It was an important part of the activity programme, was to go out, you know, once or twice a week. Nowadays that rarely happens because the needs of the residents in care homes are so acute that they can't manage to go out on a regular basis. So they don't use that facility as much as they used to ten years ago. So it's quite hard, and also, to take a resident out of a care home, they normally need a high level of staffing to be with them, so almost one-to-one [R19]</i>
Care home residents/the diversity of residents needs and leisure	<i>we took a group of older people, one of my staff organised a day out and they went for afternoon tea and look around the museum and see the new exhibits and so forth and one person with dementia got lost in the park, really didn't understand who they were and obviously sparked the police looking for her and everything because the volunteer who was supposed to be looking after her had become interested in an exhibit and momentarily stopped watching the woman, at which point the woman didn't realise she was with people and just wandered off, you know. [R1] Sometimes we organise holidays and we do it through like coach operators and people like this and again, it has to be very age appropriate, the older they are the more you have to think about the steps, you know, you have to think about en-suite bathrooms, you know, you have to think about the location, is there a hill, is there not a hill, all of these things matter much more as people, you know, it's exactly the same considerations as for disability. You have to think about things like relative insurance, you know, your procedures if someone, I mean, as has happened to us, dies on the tour. We had one tour where a lady died and as you can imagine, you know, it's a four day holiday, Day 2 someone is found dead in the bed, you know, for everyone else how do you recover the holiday from that. These things happen for any age group but it's not normally a risk as it is for the older adult [R1]</i>
Managing the diversity of needs on day trips	<i>where people do have families normally it will be the younger adults in the family who will book the villa, arrange the flights, whatever, arrange the transfers and so, you know, there is a market that caters to some extent where people are going into a travel agents and going for packages but there are restrictions, you know, so the disabled friendly and so on and so forth that sometimes people don't think about. So it's not uncommon to get older people to say, oh my daughter booked a villa in France and I was stranded there the whole time, I couldn't leave because it was beautiful but once we actually got there there was too many hills, there was this, there was that, I couldn't get out and about and that's not uncommon and, you know, the climate [R1] some of the big chains for hotels are wonderful at having disabled access and all the rest of it, you know, you can go to most countries and find a generic hotel with lifts in it and so on and so forth, the modern skyscraper hotels but where, for example, the provision is more traditional hotels, like staircases or rickety stairs or lots of bedrooms or whatever it might be, more rural places, this has been challenging, you know, the less touristy places have more appeal for older people yet they're so unsuitable [R1]</i>
Multigenerational holidays and filial duties	

(continued on next page)

(continued)

Theme	Illustration from interviews
Appropriate facilities	<i>we have to provide good basic facilities. One of the things like for example a coach tour, if you've got forty-five/fifty 50+ invariably mixed sex group coming, one of the first things that they want is "ooh we've got to have a good tea shop", so they want a cup of tea and they also want somewhere to go for a pee as well, so you have to have a decent tea facility and you also have to have decent toilets ... so you have to invest in your product knowing what your market is and catering for them accordingly with food and also with level access [R2]</i>

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