

# DELIGHTING THE SENIOR TOURIST

Gaël Astic, Griffith University  
Thomas E. Muller, Griffith University

## ABSTRACT

Because the number of seniors (aged 60-plus) in Australia, Canada, New Zealand and the United States forms roughly a third of the adult population in each of these countries, and this proportion is growing, there is considerable economic incentive for tourism marketers to sharpen their focus on older people. Because many of these seniors have the desire and means to travel for pleasure, discovery and learning, the ultimate goal for marketers could well be to delight them into becoming repeat customers. The concept of consumer delight, as distinct from mere satisfaction, is explored in this paper. However, marketing strategies aimed at delighting senior tourists need to recognize that this group is far from homogeneous. In this study, interviews of 356 retirees yielded data on their motives for vacation travel, preferences for vacation destination types, favorite mode of travel, and personal values. The results of factor analyses led to the identification of seven travel-motive segments labeled Nostalgics, Friendlies, Learners, Escapists, Thinkers, Status-Seekers, and Physicals. Strategies for delighting senior tourists will vary according to segment, thus the proposed consumer-delight strategies are discussed for each of the segments.

## INTRODUCTION

There is every good reason for tourism marketers to think of consumer delight, as they sharpen their focus on older people. Consumer delight is supposed to lead to company loyalty and customer retention. Currently, in the United States, the population of seniors (defined in this paper as those aged 60 plus) is 63 million. In Canada, seniors number 7 million. In Australia, there are 2.9 million seniors and another half-million of them in New Zealand. In all four of these countries, their numbers will grow to even larger proportions of their respective populations, primarily because all four nations experienced a post-war baby boom and the oldest Baby Boomers are currently 53 years old. Thus, the present and

future potential of older markets is not small by any measure. Many of these seniors will be capable, both financially and physically, of taking vacation trips and, as this study and others have revealed, even more of them have strong motives for wanting to travel for pleasure.

Yet, surprisingly little product development of pleasure travel options for seniors is based on seniors' underlying psychological and motivational reasons for wanting to travel on vacation (cf. Presland and Matthews, 1998; Wolfe, 1990; 1997). Without such knowledge, it would be difficult to design and develop extended service encounters (Dubé and Morgan, 1996) that generated consumption emotions leading to consumer delight. To date, the tendency of tourism marketers and tourism product developers has been to treat the seniors market as one, more or less homogeneous, segment of the vacation-travel population. This attitude among practitioners contrasts sharply with findings from empirical studies in various countries, where research on older-adult travelers in Germany (Romsa and Blenman, 1989), Canada (Duncombe, 1994; Zimmer et al., 1995), and the United States (Javalgi et al., 1992; Vincent and de los Santos, 1990) has established that the seniors market can be fruitfully segmented in various ways.

Part of the problem stems from the fact that seniors as a potential market are often misunderstood (Moschis, 1992). Stereotypes abound about the nature of the typical older adult consumer and these are reflected in tourism industry perceptions that this segment consists of people who, by and large, are "over the hill," "on the way down," generally uninterested in new things and experiences, somewhat frail or ailing, and therefore incapable of handling the strenuous aspects of travel, and in need of special care during the touristic encounter. Tourism marketers have yet to fully appreciate that seniors, as a group, possess a lot of vitality and desire to travel (Tourism Canada, 1994). As a case in point, 49 per cent of Australians aged 60 or more have no disability or physical impediment to mobility (Australian Bureau of Statistics, 1993).

Thus, with such a large potential market of

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senior tourists to draw from, the tourism industry has good reason to better understand why seniors want to travel. And since this market is projected to grow steadily over the next twenty years, it would seem that new products and marketing strategies to delight the senior traveler ought to become part of the strategic planning process in this industry.

Another important factor which drives human behavior and, specifically, consumption patterns and desired lifestyle, is a person's system of value priorities (Feather, 1996; Kahle, 1996; Rokeach, 1973; Schwartz, 1996). While the influence on travel behavior of both personal values (Muller, 1991; Pitts and Woodside, 1986) and lifestyles (Shih, 1986) have been studied, the association between personal values and travel motives among seniors has not been properly explored.

Neugarten's landmark studies in gerontology (1968; Neugarten and Neugarten, 1986) have established that, as people approach the latter part of their lifetimes, they reveal a sense of competence and mastery and a preoccupation with self-utilization. There is a tendency to search for self-fulfilling activities and experiences. As older people contemplate the reality that there is "only so much time left to live," the recurrent theme in their minds is expressed well by one such person: "It adds a certain anxiety, but I must also say it adds a certain zest in seeing how much pleasure can still be obtained, how many good years one can still arrange, how many new activities can be undertaken . . ." (Neugarten, 1968: 97). One would therefore expect not only a shift in value orientation as people reached retirement age, but also a reaffirmation of the personal decision to travel and to explore the "world" as a tourist. This predicted shift in values and behavior has been modeled and presented by Muller (1996; 1997).

### EXPLICATING DELIGHT

The notion that surprisingly positive disconfirmation can result in delight (Oliver, 1998) is not an entirely new one in the literature on the modeling of consumer satisfaction and dissatisfaction (Cadotte, Woodruff and Jenkins, 1987; Mano and Oliver, 1993; Oliver, 1980; Woodruff, Cadotte and Jenkins, 1983). However,

the actual term *delight* and the exploration of its occurrence during the consumption stage of consumer decision making (Kindra, Laroche and Muller, 1994: 54) is quite new. Hunt (1998) notes that this research stream has paid lots of attention to what happens when customers get less than they expected or exactly what they expected, but has done much less to understand what emotions are associated with getting more than expected. The term "delight" begins to appear in the consumer research literature around the early-1990s, as a label for the construct, or emotion outcome, *pleasant surprise* (Westbrook and Oliver, 1991), or *high arousal positive affect* (Spreng, 1995).

To distinguish between satisfaction and delight, Kumar and Olshavsky asked consumers to describe recent personal experiences where they had felt either satisfied or delighted (Kumar and Oliver, 1997). Satisfaction is associated with consumers' expectations being met, feelings that they received "fair" value, and feeling contented. Delight, on the other hand, produces feelings of surprise, of expectations having been exceeded, and feelings of elation. All in all, their research showed that the two emotions are quite distinct and separate.

The trick, it seems, in terms of the classic consumer satisfaction model, is to provide service that is above the zone of indifference (Dabholkar, 1995), so that not just positive disconfirmation, but *surprisingly positive* disconfirmation, has a greater chance of occurring in the consumer. And how does one do this with tourism products designed and developed specifically for the senior vacationer or traveler? That very much depends on what motives are driving the senior tourist. One large-scale study of senior tourists (Duncombe, 1994) concluded that a good strategy would be to "Surprise them with the exotic." But, in the absence of a motives-based segmentation strategy, it is difficult to decide what will be perceived as exotic and what will provide pleasant surprises. If one could know the varied motives that make a senior want to travel and become a tourist, it would be possible to design travel experiences that were likely to produce pleasant surprises and delightful experiences.

### AIM OF THIS STUDY

The purpose of this empirical study was to discover underlying travel motives among seniors and to find groups of senior tourists with common motives. The aim in this paper is to show that travel-motive segments could become the basis for the development of themes that might result in consumer delight, and thereby create repeat customers and generate favorable word-of-mouth communications in the 60-plus market. It was reasoned that an understanding of travel motivations is essential to the design of tourism products that generate delight because such products recognize the senior's personal values and are central to the older traveler's lifestyle and psychological needs.

Travel motivations have been proposed by tourism researchers as a general tourism market segmentation tool (Ryan and Glendon, 1998). A thorough understanding of travel motives makes it possible to develop and promote concepts (tourism activities, destinations, travel services) that are perceived by seniors as attractive, congruent with their self-image, and in tune with their values and demographic circumstances, as well as their health and physical capabilities. Armed with this knowledge, the creative marketer can begin to assemble the components of a delightful experience. Fostering the occurrence of consumer delight is the strategic goal here.

### RESEARCH METHOD

A convenience sample of 356 senior citizens, aged between 56 and 93, was interviewed during June, 1998. The sample was identified with the help of the Office of Aging, in the Queensland Department of Families, Youth and Community Care. Interviews were conducted in group settings that varied between 10 and 30 persons inside community halls and senior citizens' clubs around Southeast Queensland. Respondents (95.3% fully retired and 73.5% born in Australia) filled out a self-completion questionnaire designed specifically for this study, after listening to verbal instructions from the researchers.

Vacation travel motives were measured with 48 items after carefully reviewing the literature on leisure and recreational motives, the tourism

literature and research conducted on the aging post-WWII baby-boom generations of the United States, Canada and Australia. The final pool of items was chosen to represent

1. The four-factor components of leisure motives: intellectual, social, competency/mastery, and stimulus avoidance (Beard and Ragheb, 1983);
2. Eight travel benefit factors: excitement, self-development, family relations, physical activity, safety/security, social status, escape, and relaxation (Moscardo et al., 1996);
3. Several aspects of the eight predicted value and lifestyle trends among Baby Boomers approaching their retirement years: voluntarism, commitment to grandchildren, spirituality, nostalgia, entrepreneurship, political activism, learning for self-fulfillment, and discovery tourism (Muller, 1996; 1997).

The travel motivation items were presented as "My own reasons for vacation travel are..." and respondents indicated on a 10-point rating scale whether they agreed or disagreed with each. The List of Values, developed at the University of Michigan (Kahle, 1996), was used for the personal values measures. The List of Values was chosen because it is short, as well as being adequate for the scope of this study. Respondents indicated which one of the nine terminal values was most important to them in their lives.

Given that a senior's health might be a strong factor in touristic experience decisions and motivations, a senior's perception of his or her overall health was also assessed, using a 10-point rating scale anchored at "poor" and "excellent." Also obtained were year of birth, gender, marital status, number of grandchildren, educational attainment category, and household income. Behavioral patterns were assessed for favorite way of travelling on vacation (by myself, with one other person, with a group of friends, or with family members) and a complete ranking, by preference, of eight major vacation destination types within Australia (heritage town, forest, beach, city, outback, reef, island, and mountains).

## FINDINGS

### Factor Analysis of the Motives

Principal components factor analyses were performed to identify groups of travel motives where the individual items were highly intercorrelated, but distinct from other groups of motives. The overriding objective was interpretability of the resulting varimax-rotated factor matrix, not maximum explained variance or the inclusion of all factors with eigenvalues of 1.0 or higher. On the basis of our theoretical expectations and the interpretability of the factor-item loadings, seven factors were identified (explaining 60 percent of the variance in the 48 items). They clearly reflected most of the underlying dimensions of travel motives that were expected and the factors were labeled accordingly.

The next step was to create travel-motive segments, using respondents' scores on the items within each of the seven factors. First, however, seven of the items were removed because they loaded similarly on more than one factor (factor-item correlations within 0.05 of one another). Next, "segments" were created by averaging respondent  $r$ 's item scores ( $X_{ijr}$ ) across all  $k$  items ( $i$ ), within factor  $j$ , and assigning the respondent to the travel-motive factor on which that person had the highest mean. Thus, respondent  $r$ 's segment membership ( $S_r$ ) was determined as follows:

$$F_{jr} = (1/k) \sum_{i=1}^k X_{ijr} \quad (1)$$

$$S_r = \max(F_{jr}) \quad (2)$$

### Identification and Profiling of the Seven Travel-Motive Segments

Once each respondent's segment membership was determined, the relative size of each segment among senior travelers could be estimated. The seven travel-motive segments are presented in Table 1. They have been labeled and profiled according to the travel motive items included in each of the factors derived earlier. *Nostalgics* are the largest segment and represent 32 per cent of

our sample. The smallest segment is the *Physicals* (3.4% of tourists), seniors who travel so they can participate in a sport, get physically invigorated, or find thrills.

**Table 1**  
**Descriptors of the Seven Travel-Motive Segments**

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<b>Nostalgics (32.0%)</b>
To visit a friend or relative
To make pilgrimages to places which have memories for me
To visit a place where my family's roots are
To try to achieve family togetherness on a vacation
To be able to relive some of the good memories and good times from my past
To enjoy surroundings that are comforting and reassuring
<b>Friendlys (22.7%)</b>
To meet new people and make new friends
To become better friends with someone, by vacationing together
To travel together with a group of people who share my interests and values
<b>Learners (18.9%)</b>
To collect new and different experiences
To satisfy my curiosity or increase my general knowledge
To keep me well informed and on top of what's going on
To learn new things and enrich my life
To become a more cultured person
To feel connected with other people and experience a sense of community
To experience the fun of discovery
To feel I am actively involved in the world around me
To be a little adventurous
To improve or renew my skills as a traveler
<b>Escapists (9.3%)</b>
To get away from the demands at home and in daily life
To relax and do nothing at all
To indulge in a bit of luxury
To get away from doing too much thinking
To avoid boredom
To be entertained and looked after by others
To change my surroundings for the sake of change
<b>Thinkers (7.1%)</b>
To help me think about who I am and what life means
To raise my self-esteem
To challenge my mental abilities
To share my thoughts and feelings with my travelling companion
To go to a place where I can feel safe again
To find simplicity, certainty, or peace of mind and soul
Because I sometimes like to be alone
<b>Status-Seekers (6.5%)</b>
To enable me to go to places where my friends or rivals have not been

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Table 1 (cont.)

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To gain the respect of others
To keep up with all the vacation travelling that I see others doing
To be able to tell stories of my vacation adventures and mishaps to my grandchildren
To be able to tell others about where I have been and what I have seen
<b>Physicals (3.4%)</b>
To give me a chance to participate in a sport I am fond of
To find thrills or excitement
To obtain some form of physical invigoration

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Table 2 offers a value-based profile of the four largest segments. It gives the percentage distribution of the single most important value chosen by respondents from among the nine-item List of Values (Kahle, 1996). Frequencies for the value *fun & enjoyment* were combined with those of *an exciting life* (both are hedonistic values) because so few people had chosen the latter as their most important one. Two other values (*being highly regarded by others* and *a sense of belonging*) have been suppressed because 5%, or fewer, seniors had picked either of these as most important and their inclusion in the analysis would have inflated the proportion of cells with an expected frequency of less than 5. The frequency distributions within this crosstabulation were sufficiently different to give a significant chi-square result. A perusal of the percentage distributions reveals some major differences in the importance of these six personal values within a segment. The implications of these differences are presented in the discussion section.

Table 3 gives the distribution of travel modes for the six largest segments. *Physicals* are excluded in order to reduce the proportion of sparse cells. A chi-square analysis reveals significant differences in the preference to travel by oneself, with one other person, or with either a group of friends or family members.

Many additional analyses were performed to derive a demographic profile of the seven segments and to test whether preferences for vacation destination types differed by segment. None of the analyses yielded a demographic or destination-preference picture of the various segments. Thus, it was concluded that, because the target market is already narrowly defined as Australian seniors, variations in the demographic

and destination preference data are too narrow to be useful as segment profiling variables. In any case, Table 4 profiles the overall sample.

## DISCUSSION AND IMPLICATIONS

It is instructive to learn from this study that standard demographics and vacation destination-type preferences—two of the most commonly employed research variables among tourism marketers—were unable to distinguish among senior segments uncovered by their travel motivations. Clearly, the method of creating distinctive groups of senior travelers by tapping their underlying motives and values is revealing something which demographics or destination preference could not identify. The guiding purpose of this study was to discover whether the vacation travel motives of retirees could be used as a means of identifying groups of seniors with common motivations for experiencing various forms of touristic recreation. Our findings suggest that such a segmentation scheme defies the standard demographic and destination preference boundaries often used in tourism marketing research.

Because each segment cannot be identified or defined in the standard demographic manner, such travel motive-based vacation travel packages need to be carefully positioned so that their *content and orientation* become amply clear to the targeted senior traveler, who then becomes a potential customer—an interesting twist to segmentation-based marketing strategy for a demographically homogeneous senior market. The four largest senior travel-motive segments—in decreasing order by size—are the *Nostalgics*, the *Friendlys*, the *Learners*, and the *Escapists*, and these represent roughly 83% of the seniors travel market. Each of the four is discussed briefly and strategies for creating consumer delight in each segment are suggested.

### Nostalgics

*Nostalgics* have a tendency to travel for the sake of renewing memories and gaining satisfaction from the opportunity to relive fond memories, achieve family togetherness, and make "pilgrimages" to places that are imbued with pleasant aspects of their past. Just under 40% of

Table 2  
Percentage Distribution of Single Most Important Personal Values Within the Four Largest Segments

Most Important Value		Segment				Total
		Learners	Escapists	Nostalgics	Friendlies	
A sense of accomplishment	Count	9	1	3	4	17
	% of Segment	18.4%	3.8%	4.2%	7.4%	8.5%
Self-fulfilment	Count	4	2	9	4	19
	% of Segment	8.2%	7.7%	12.7%	7.4%	9.5%
Security	Count	4	4	13	13	34
	% of Segment	8.2%	15.4%	18.3%	24.1%	17.0%
Warm relationships with others	Count	8	4	28	10	50
	% of Segment	16.3%	15.4%	39.4%	18.5%	25.0%
Self-respect	Count	11	6	13	9	39
	% of Segment	22.4%	23.1%	18.3%	16.7%	19.5%
Fun and enjoyment & Excitement	Count	13	9	5	14	41
	% of Segment	26.5%	34.6%	7.0%	25.9%	20.5%
Total	Count	49	26	71	54	200
	% of Segment	100.0%	100.0%	100.0%	100.0%	100.0%

Chi-square = 33.38; df = 15; p < .005

*Nostalgics* choose *warm relationships with others* as a primary value and they fulfil this by visiting friends and relatives. *Fun and enjoyment* and *a sense of accomplishment* are not common value priorities within this segment. They also have a tendency to prefer travelling with family members. Thus, it would seem that tailoring tourism products for this segment would present quite a challenge, largely because the places where their family roots are and where they can relive memories necessarily will be idiosyncratic. However, delighting these seniors could be achieved by creating specific events that recreate the past for many *Nostalgics*, at the same time and place, by choosing a unique destination. Examples would be a jazz festival or rock concert at a site that had the qualities of a Woodstock, but with amenities for comfort and accommodation that would cater to families or groups of friends. Other possibilities are classical or popular music performances in

wide-open, outdoor spaces (the desert, the edge of the Grand Canyon, the Australian outback), or mystical (magico-religious) experiences by arranging an event or gathering at sites imbued with the past (Stonehenge, Neolithic worship sites, Mayan temples).

### Friendlies

*Friendlies* like to travel in order to meet new people and make new friends, and to be together with people who share their interests and values. They tend to be security conscious, and members of this segment are least likely to want to travel by themselves. They are definitely social travelers. Tourism concepts and ready-made vacation packages that offer them a chance to meet and to experience fun and enjoyment with others who have a similar socio-economic and interest background stand a good chance of delighting this

**Table 3**  
**Travel Mode Preferences for the Six Largest Segments**

Travel mode		Segment						Total
		Learners	Thinkers	Escapists	Status	Nostalgics	Friendlys	
by myself	Count	11	3	2		9	5	30
	% of Segment	19.0%	13.6%	7.4%		8.9%	7.1%	10.1%
one other	Count	28	10	18	8	38	31	133
	% of Segment	48.3%	45.5%	66.7%	42.1%	37.6%	44.3%	44.8%
friends only	Count	5	5	5	6	15	19	55
	% of Segment	8.6%	22.7%	18.5%	31.6%	14.9%	27.1%	18.5%
family	Count	14	4	2	5	39	15	79
	% of Segment	24.1%	18.2%	7.4%	26.3%	38.6%	21.4%	26.6%
Total	Count	58	22	27	19	101	70	297
	% of Segment	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%	100.0%

Chi-square = 31.1; df = 15; p < .01

segment. While safety should be emphasized to ensure consumer satisfaction, the common-interest theme can be exploited in attempting to delight this segment. Cruises to brand-name destinations (Acapulco, Alaska, Rio de Janeiro, Honolulu) that have recognition familiarity are one example. Themed trips (eco-tours for wildlife lovers, winery tours for wine buffs, cruises designed for association members) would also present the opportunity to generate consumer delight.

### Learners

*Learners* are possibly an easier segment to delight when developing tourism products. They represent almost 20% of the seniors market and their overriding aim is to collect new experiences, discover the world around them, learn new things and satisfy their thirst for knowledge and adventure. The two most popular values among *Learners* are *fun and enjoyment in life* and *self-respect*. But the proportion of *Learners* who espouse the value *a sense of accomplishment* is far greater than in any other segment. This knowledge-driven tourism segment is not security minded and has the highest proportion of seniors who do not mind travelling by themselves, and the lowest proportion whose favorite way of travelling on vacation is with a group of friends. Travel concepts to delight *Learners* need to emphasize new experiences, discovery and learning, culture,

and active involvement with their touristic surroundings—things like trying the local food, mixing with the locals, and savoring the local lifestyle.

### Escapists

*Escapists* have as their primary travel motive the need to get away from the demands of daily life and responsibilities. Travel products aimed at delighting this group need to underscore that the vacation will offer a carefree period of rest and relaxation, and the luxury of being looked after, in a non-intrusive manner, during their stay, usually at a single destination on a given trip. *Fun and enjoyment in life* and *self-respect* are the most commonly espoused values among *Escapists*. They do not like travelling with family members and two thirds of them most prefer travelling with just one other person (the highest proportion among all segments). Products designed for *Escapists* should not be packed with activities and, indeed, generating consumer delight among this group requires that staff at the vacation destination minimize their visibility while still providing a relaxing, pleasurable level of service.

On a concluding note, it is worthwhile mentioning that the typical vacation experience is one where many service transactions extend over time. Dubé and Morgan (Dubé, 1994) found that consumption emotions during the consumption

**Table 4**  
**Demographic and Destination-Preference Profile of the Entire Sample**

Variable	Proportion (%)	Median Rank	Proportion Giving It Highest Rank (%)
Females	80.3		
Aged between 56 and 74	49.4		
Self-rated health 8 or better (on a 1 - 10 scale)	55.3		
Widowed, divorced or single	53.3		
Married	46.7		
Number of grandchildren			
Four or fewer	52.9		
Five to 32	47.1		
How highly educated?			
Less than secondary completed	48.2		
Completed secondary school	29.5		
Skilled trade certificate, or higher	22.2		
Household income			
\$0 - \$299, per week	49.4		
\$300 and up, per week	50.6		
Preference for destination type			
Island		3.0	22.6
Mountains		3.0	17.6
Outback		4.0	12.8
Reef		4.0	8.3
Forest		5.0	8.0
City		5.0	11.3
Heritage town		5.0	8.3
Beach		6.0	11.0

episode are not simple averages of successive momentary states. In fact, first and last consumption emotions are more determinant in retrospective judgments of the overall consumption emotion, which would include delight. The touristic experience of the senior is therefore likely to be evaluated heavily by first and last (or early and late) impressions (either cognitions or affect) and the resulting feelings of delight or dismay. Strategically, this suggests that the tourism product developer needs to incorporate elements during the

very early part of the touristic experience that have a good chance of resulting in surprisingly positive disconfirmation. Then, at the end of this extended service encounter, elements need to be introduced that could again lead to positive surprises. This strategy suggests that it may be necessary to withhold some information about the product-service package from prospective customers-in order to make surprises possible. The divemaster who tells his recreational scuba divers that there will be a "surprise" at the end of the dive trip, but



does not divulge to the group what it is until they experience it (it turned out to be the chance to surface inside an undersea cave with an air trap in it) is practicing that sort of strategy.

Such a strategy indicates that a disproportionate amount of attention and resources need to be diverted to two key points in the extended service encounter of the tourism experience—the beginning (where first impressions count heavily) and the end (where last impressions will also be more determinant in consumption emotions). Thus, early activities need to be thought out carefully and service providers need to be sensitized to their actions and reactions in the beginning of the tourism episode. Similarly, a "good-bye, see you again" attitude needs to pervade the final few activities and service interactions, with perhaps a pleasant surprise thrown in at the end.

Complicating the emotional response scenario, however, is the research finding that, throughout an extended service encounter (such as a multi-day, white water river rafting trip; Arnould and Price, 1993), there is a rhythm to the emotional experience as many different emotions unfold, ranging from confusion and anxiety through excitement to feelings of love, warmth and affection (Price, Arnould and Hausman, 1996). As Oliver (1993) has pointed out, the complexity of the satisfaction formation process is not yet fully understood and additional work in this area is needed. But there is some indication that delighting the senior tourist requires elements of surprise in the tourism product so that surprisingly positive disconfirmation can occur.

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**Send correspondence regarding this article to:**

Thomas E. Muller  
School of Marketing and Management  
Gold Coast Campus, Griffith University  
Queensland 9726 AUSTRALIA