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# Travelling and the well-being of the elderly: expectations and risks

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**ABSTRACT:** The aim of this article is to highlight the importance of tourist travel for the well-being of older people by identifying some of the psycho-sociological components of their decision-making processes in the context of nursing homes and the family, with reference to the values and difficulties that may either motivate or affect them. Given the trend towards an increase in the percentage of the elderly population in our societies, and with the anthropological, sociological and ethical questions that this raises, it is very important to consider crucial aspects in contemporary research, especially those related to their well-being, including leisure travel. The practical component of this study is part of a qualitative research methodology, which before taking the existence of social facts for granted, aims to understand the participants' perceptions of the world.

**KEYWORDS:** care homes, happiness, constraints, isolation, mobility

## Introduction

Considering the preferences of the people involved in correlation with the potential incentives and constraints, the purpose of this article is to study the importance of travelling, for the well-being of older people, especially of those who live in care homes. We have adopted the notion of Webber et al. (2010, p. 443), who considered that mobility is "defined as the ability to move oneself (e.g. by walking, by using assistive devices, or by using transportation)...[and] is fundamental to active aging and is intimately linked to health and quality of life".

In this context, it is important to bear in mind that mobility is determined by cognitive, psychosocial, physical, environmental and financial influences. It can reduce the risk of social exclusion, which in turn increases well-being (Stanley et al., 2011). According to Moal-Ulvoas (2017), travelling allows older adults when confronted with other cultures to better identify the strongest and weakest dimensions of their own spirituality and its potential for personal growth in the context of a more holistic view of the world, assuming that spirituality has to do with the meaning of life.

According to Rosa (2000), demographic ageing is characterised by a change in the population's age profile, with an increase in the statistical importance of people over 65 years old, at the "top" of the age pyramid, and a decrease in the statistical importance of people at younger ages, at the "bottom" of the pyramid. Europe's sociodemographic profile, in general terms, shows that demographic ageing began in the 1960s and represents a significant trend with social, economic and political consequences. This reality is characterised by three factors: "a fertility rate lower than that needed to ensure

the replacement of generations, combined with a significant increase in longevity and insufficient numbers, aggravating the ageing of the population" (Rodrigues & Henriques, 2023, p. 5, our translation).

These issues are all the more important given that population ageing is one of the results of the modernisation process in Western societies as a result of improved living conditions in general and health in particular.

As Portugal is, demographically, the second oldest country in Europe and the fourth oldest in the world (the older age group accounts for almost 25% of the total resident population; Euromonitor International 2023), attention to the problems inherent to them is particularly important, especially those relating to aspects of their lives that have traditionally been neglected, such as the enjoyment of their leisure time.

The studies of free time and leisure are multidisciplinary approaches, with leisure being understood in this context as a set of actions voluntarily chosen to be enjoyed in one's free time (Dumazedier, 1976). Leisure and tourism are therefore social phenomena, potentially generating, in their complementarity, new products and opportunities provided by industrial and post-industrial societies.

## Literature review and conceptual framework

This is a brief review of the literature that, in one way or another, addresses the relevance of travelling to people's well-being and fulfilment in life. This review allows us to better identify some of the anthropological references that are decisive for the problem under study.

It is therefore important to consider that the "departure" is

temporally preceded by the "before" of the journey and that the arrival is succeeded by the "after" (Fernandez, 2001). There is thus an anteriority and a subsequence that correspond to significant anthropological experiences that tend to be more profound than the circumstantial experiences provided by the hiatuses of departure and arrival: in the first case, it is a hybrid experience of the possible between the limits of the known real and the horizons of the imaginary, not only in terms of time, but also in terms of space; in the second case, it is a retrospective look at a past experience that is somehow prolonged in a new departure and a new arrival. However, now these two experiential gaps are psychologically involved by the feelings provided by the "during" of the journey, that is, the practice of the real and its representation.

Adopting Smith and Diekmann's (2017) conception of what an optimal form of wellness tourism is, we consider that their model incorporates three dimensions: the intrinsic experiences of pleasure and relaxation, the search for new sensations through meaningful experiences, particularly of an educational nature, and the altruism resulting from activities being environmentally friendly or benefiting local communities. Two conceptions of well-being may prevail here: the hedonist and the eudaemonist. The hedonist emphasises the experience of pleasures (Ryan & Deci, 2001) and the eudaemonist, contrary to the importance of immediate pleasures, values well-being in connection with socially valid actions and activities endowed with a more human and socially demanding sense, in which the sought and eventually achieved satisfaction is based on the congruence between the present situation and an ideal. Both concepts reflect subjective assessments (Boniwell et al., 2016), which depend in particular on the generations and lifestyles of those who think and formulate them, in this case, older travellers (Gordon, 2002).

American humanistic psychology, from the 1960s onwards, and positive psychology in the 1990s placed greater importance on the individual and their happiness and subjective well-being (Smith & Diekmann, 2017); however, several researchers point out that it is important to overcome the reduction of well-being to happiness. Seligman (2002), for example, shows how a good and meaningful life provides more satisfaction than mere pleasure, which forces us to consider the need for a combination of the hedonistic and eudemonistic dimensions of tourism.

Several current studies (Qiao et al., 2022; Singh & Suvidha, 2024) emphasise the growing importance of travel, in general, and leisure travel, in particular, for the well-being of the elderly. All this is framed in a context of progressive awareness to value older people for reasons that are not only humanitarian, but also economic, along with a deeper scientific knowledge of their frailties and their aptitudes and potential.

### Method and instruments

The main perceptions identified in the previous point were gathered by applying a semi-structured interview survey, which became a dialogue oriented towards the purpose of the study (Minayo & Costa, 2018) allowing the interviewers, supported by a script with questions, to collect data in order to construct meaning from the answers provided (Glesne, 2016).

The data presented here for discussion was obtained from residents of two residential care institutions for the elderly in the city of Porto. This data is part of a study that seeks to

understand the importance of travelling for the well-being of the elderly, aiming to understand their own expectations and the perceived risks.

Data was collected using a semi-structured interview survey. After the transcription of the interviews, open coding was conducted by identifying and labelling significant pieces of data (words, phrases, sentences) based on their meaning. Four stages of coding were followed: (1) familiarisation with the data; (2) highlighting significant parts of the data and assigning labels; (3) grouping similar codes together into themes or categories; and (4) interpreting the categories and drawing conclusions. In summary, the data collected was subjected to the process of categorisation "by cutting, aggregating, enumerating, making it possible to achieve a representation of the content" (Bardin, 2009, p. 103, our translation). It was processed using thematic or categorical content analysis, following the stages recommended by Bardin (2009) and observing the rules of completeness, homogeneity and relevance. When segmenting, care was taken to cut out the discourse recording units without losing their semantic function, taking into account their relevance to the objectives of the study. The categorisation used is presented in Table 1.

Thematic analysis was conducted by identifying patterns, mostly underlying meanings of the participants' replies. To ensure the reliability of the research findings and to improve trustworthiness, the main strategy included peer review from the authors of this article and feedback from the interviewers to assess the validity and reliability of interpretations.

### Sample: participants and procedures

Regarding the sample and taking into account the reference literature in the area (Guest et al., 2006), and given the nature of the present study, especially naming the number of main and complementary questions put to the interviewees, it was decided the application of the semi-structured interview survey to thirteen participants with homogeneous characteristics, representative of two residential care institutions for the elderly, not only satisfied the scientific criteria of reliability and validity (Silva et al., 2018) but it also allowed us to realise that the data

TABLE 1: Categorisations used

CATEGORIES	SUBCATEGORIES
"well-being tourism"	Regularity of journeys Reasons for travelling What you value most when choosing a destination The significance attributed to travelling
"before" and "after" the journey	Expectations/interests before the trip Confirmations/disappointments after the trip Feelings experienced and lessons learnt after arrival
"constraints" and "perceived risks"	Constraints experienced before departure Perceived risks during the journey Valuing travelling in company

obtained in the thirteen interviews presented, at a certain point, redundancy or a repetition of results.

It is plausible though to state that the total number of participants in a qualitative study depends directly on the variables that define data saturation, such as: (1) the theoretical framework; (2) the study's scope, expressed in the study's main objective; (3) the desired depth; and (4) the characteristics of the participants, i.e. their homogeneity. These variables point to evidence that the point of theoretical saturation can be reached from the twelfth interview onwards, with basic elements of saturation already evident in the first six interviews (Francis et al., 2010).

In this context, the thirteen study participants who make up the simple random sample of users who usually live in the two institutions — nine were interviewed in residence A and four in residence B — show the following characteristics: all the participants were female; eight users were between 80 and 89 years old, and five interviewees were between 56 and 70 years old; seven of the interviewees were widowed, three were married and three were single. In terms of academic qualifications, ten had completed the four years of compulsory schooling at the time they attended, and three had completed seven years of schooling, which at the time meant a high level of educational and technical training. This distribution of educational qualifications is reflected in the interviewees' previous professional occupations, where the majority having held modest jobs such as domestic workers, education assistants, cooks, factory workers, bakery workers or catering workers; a smaller group had a professional career linked to administrative services in offices or public functions.

Data collection took place during May and June 2023, and all the arrangements were made with the management of the institutions and informed consent obtained from the interviewees. The application of the semi-structured interview survey was preceded by careful preparation by the four interviewers (who were studying for a degree at a higher education institution) based on a script to check the conditions under which the one-to-one interviews would take place and to place a simulation of the application of the interview script to collect descriptive data in the interviewees' own language.

By focusing, without any pretensions to generalisation, on users of two residential institutions to which we had free access, this study seeks to open up from the intrusive potential of travelling to an understanding of individual dynamics considering their own testimonies. Based on this preliminary approach, we have outlined the possible conflicts between the individual dynamics of the elderly and the disciplinary logics of collective management insofar as the latter can tend to cancel out that dynamic.

## Results and discussion

Although the phenomena described are relatively common, various advancing age constraints end up conditioning the possibilities of travelling and consequently of leaving (Huber et al., 2019). The nature and intensity of these constraints, primarily in terms of health, but also in terms of one's own interests, preferences and choices, have important repercussions, although with some differences according to the ages considered and the life itineraries experienced: "In particular, older people often expressed more conservative views when it came to travelling

compared to pre-seniors and young people" (Lee & Bowes, 2016, p. 1).

Perceived risks play an important role at these ages: natural or man-made disasters, such as terrorism (Wolff & Larsen, 2014), physical risks (Roehl & Fesenmaier, 1992), financial risks (Quintal et al., 2010) and psychological risks (Reichel et al., 2007).

Risk perception is, as Fuchs & Reichel (2006, p. 86) define it, "the consumer perception of the overall negativity of a course of action based on an assessment of the possible negative outcomes and the likelihood of these outcomes occurring". Priest's (1993) concept is also interesting in this case, considering that the perception of risk is mainly the potential to lose something initially valuable.

The same happens with the use of computer-based technologies, in which intra-and interpersonal, structural and functional difficulties arise, often worsening in people of more advanced age (Lee et al., 2011). These difficulties have repercussions in terms of total or partial blockage of access to information about travel and destinations, which increasingly favour the internet as a mean of communication.

For the purposes of discussing the data, it should be noted that not all the interviewees answered all the questions in the script in a complete and homogeneous manner, and in some cases, there were silences or deviations in content. Thus, nine of the interviewees had previous experience of travelling, one had no previous experience and two omitted this information. Of the nine who had travelled in the past, five had travelled for between a week and three months. The other four travelled for less than a week, many even for just one day. It is a common perception among the more well-travelled older women that a trip abroad meets the requirements of an authentic trip. All those who had travelled said they had positive experiences, either because what they found at the destination matched their initial expectations, or because of the company.

Six participants said that they do not travel or do not travel regularly now, pointing to their advanced age, which presents difficulty with movement, the increased risk of falling, being robbed, or the absence of family company as inhibiting factors. The three elderly women who did travel did not do so very often, only in fixed months of the year, or on weekdays. It is worth noting that all of them preferred travelling with company, six of them with family members. Of those who explicitly expressed a desire to travel, three would have liked to travel for strictly religious reasons, although they felt they could not do so. Generally speaking, in terms of the reasons that lead people to travel, the interviewees pointed to the leisurely nature of the trip, enlisting as additional motivations socialising, relaxing, enjoying holidays, contemplating new landscapes, visiting monuments and the possibility of meeting different people. The overwhelming majority believed that travelling was worthwhile for the reasons mentioned above and not for strict reasons of convenience, such as the need to work (P6/E6: "*No, I like travelling and it is not for work, but for socialising*"). All except one of the interviewees, who said she had been disappointed by the climate at the destination, felt that the destination they had visited and the company they experienced had satisfied them. Before travelling, five interviewees said they did not feel any particular problems; as for the current situation, several said they could answer that because they no longer travel.

Regarding the specific fears of travelling, seven said they were not afraid of travelling (P9/E9: "*I like packing*"; P9/E7: "*I'm not*

afraid, but if I were afraid, I'd have to get over it..."). Of those who revealed fears, they mentioned health problems, fear of theft, accidents, particularly falls, and walking in the street. The use of computer resources was never mentioned.

The interviewees were divided as to whether travelling is more risky than normal life. However, there was unanimous agreement that the company of other people makes travelling more enjoyable. After returning, everyone said they felt positive about the satisfaction they had achieved, the experiences they had had, the sharing of these experiences and the pleasant memories they had left.

Among the answers given to the questions posed, those belonging to the three interviewees (E11, E12 and E13) with the highest qualifications (two with seven years and one with twelve years of schooling) and whose previous professional occupations, as civil servants and administrators and as baby room attendants, showed a qualitatively greater degree of complexity. For example, the meaning of "travelling" extends geographically beyond national borders, in contrast to "strolling" locally (P1/E12). It also extends to getting to know new cultures and people (P1/E11) and is even distinguished by the possibility of acquiring a new language (P1/E13). These three interviewees belonged to the group whose trips lasted longer, and which also travelled more frequently. Although they valued safety, culture and the people of the countries to be visited, important factors when choosing a trip for their personal enrichment, they did not make these things dependent on either their success or safety.

## Conclusion

The aim of this study was to identify the contextual and personal constraints, as well as the opinions and desires of elderly people living in care homes regarding tourist trips. Important aspects were thus identified and presented in the context of correlations, particularly between the imaginary, the experiences, the fears and the expectations of the protagonists who were interviewed.

One verifies that there is a positive outlook, despite the difficulties and constraints, regarding representations of the impact of travelling on people's well-being, including the variety of interests it can motivate, which is an important element when considering the role of projects in old age, especially in overcoming their tendency to fade or their dominant imposition by external entities. Encouragement thus seems to supersede fears, which could justify a renewal of assumptions, strategies and objectives in the social and institutional framework for old age.

This study confirmed the perception that leisure trips in particular have an important place in the lives of the elderly, in this case institutionalised, whenever possible in their real experiences and almost always also in their imagination. Naturally, the initiatives of organisations are important here, along with the maintenance of family ties, as the constraints of existing in a collective can play a negative role when they suppress individual impulsiveness, or a positive one when they allow and enable the implementation of joint projects. The creative and motivating role that the dynamics of travelling play is evident, not only in the experiences and openness to otherness and newness that it provides, but also in the intellectual and emotional openness that it brings, along with the acquisitions that its realisation outlines in the core of each person. Future studies should make it possible to identify and

deepen the importance of the utopian dimension of travelling in the preservation and development of the mental health of the elderly, as well as to combat the threat of loneliness tends to emerge more sharply at these ages, among other aspects, due to a decrease in the future as an expectation of life, which results in depression and sadness.

This study aims to contribute to encouraging safe and rewarding travel experiences for the elderly, involving an integrated approach, with collaboration between policymakers, health care providers and tourism agencies, in order to ensure their safety, autonomy, dignity and social inclusion, preventing their isolation.

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