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How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying?

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"*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"?

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A RESEARCH THESIS SUBMITTED TO

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ABSTRACT

The growing number of baby boomers travelling by air has caught the attention of many writers and researchers and the effects of this trend have been increasingly discussed in tourism and related literature. Whilst there is a plethora of literature discussing baby boomers and air travel, at the time of research there was a dearth of literature investigating the perceptions of various tourism industries' stakeholders regarding the readiness of the airlines to handle the growing number of baby boomers travelling by air. This is within an Australian national context.

A qualitative research methodology was applied to investigate the research problem. The data was collected through 32 semi-structured in-depth interviews whose participants were located in Australia. The literature review identified the paradigm of dynamic capabilities, a subfield of strategic management, and stakeholder theory as the academic lenses with which to interpret the data (drawn across 9 tourism stakeholder categories). Member-checking was employed as a form of triangulation.

Because over 50% of air travellers are tourists, the perceptions of the various Australian tourism sector stakeholders are important to airlines' consideration of their dynamic capabilities for achieving competitive advantage in an increasingly competitive environment.

The views of the stakeholders in regard to the readiness of the aviation industry to handle the increasing numbers of baby boomers flying were varied and fragmented. Some of the stakeholders were of the belief that airlines were handling baby boomers well and others considered that more needed to be done. The detailed results of these findings are presented.

The results of the interviews are compared to existing research into aviation and the baby boomer traveller market. Where previous research findings have been supported or alternative

results have occurred, this has been noted. As such this thesis provides a substantive summary of previous research in this area, together with new research. It provides a categorisation of issues on which further quantitative or stakeholder research could be based. The research also provides an example of the application of dynamic capabilities to baby boomer and aviation research.

The proportion of air travellers who are baby boomers is increasing, and the findings indicate the importance of airlines gaining a more advanced understanding of the requirements of baby boomer air travellers. Airlines may improve their competitive advantage by developing dynamic capabilities to meet the demands of baby boomers. If airlines succeed in doing this, tourism stakeholders will think more highly of their abilities amid market changes including demographic shifts and increasing competition.

KEYWORDS

Airlines, Australian tourism industries, baby boomer tourists, baby boomer travellers, change management, civil aviation, dynamic capabilities, stakeholder theory, strategic management, traveller demographics.

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STATEMENT OF ORIGINAL AUTHORSHIP

This is to certify that the work presented in this thesis is, to the best of my knowledge and belief, authentic and original, except as referenced and acknowledged in the text, and that the material has not been submitted, either whole or in part, for a degree or any other academic qualification, at Southern Cross University or any other university.

I also certify that, to the best of my knowledge, any assistance received in the preparation of this thesis, and all sources utilised have been appropriately acknowledged.

Signed: ……..

Date: ……

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As a local student of Southern Cross University, I was more than impressed by the supportive attitudes of the library staff in assisting me with major facets of referencing and research requirements. Special thanks go to Kate Kelly and Li Zhang for their endless phone assistance as

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This thesis is dedicated to my Creator whom I thank for my intellect and free will.

CHAPTER 1

INTRODUCTION TO THE STUDY

1.1 Chapter objectives and structure

This study examines the perceptions of Australian tourism sector stakeholders with regard to the readiness of airlines for handling the growing number of baby boomers flying. Various papers (e.g. Browne 1984; Glover & Prideaux 2009) express concern at the ability of Australian tourism providers to meet the changing requirements of travellers and tourists of the baby boomer generation, as this cohort of travellers gets older. The baby boomer generation is defined as being those persons born between 1946 and 1964 (ABS 2010; Loroz & Helgeson 2013; Lub, Nije, Bijvank, Blomme, Schalke 2012; Ong, Phillips & Chai 2013; Prabhu 1996; Zopiatis, Krambia-Kapardis, Varnavas 2012). The unique demands of this important generation have been identified by writers and researchers such as Glover and Prideaux (2009) who identified that age demographics may influence choice of travel destinations. However there is a paucity of research into the perceptions of various Australian tourism industries' stakeholders with respect to the readiness of the airlines (operating to, from or within Australia) to handle the growing number of baby boomer passengers, as they get older. For example, Rahman (2011) researched the ability of the civil aviation airlines to meet the requirements of physically impaired air travellers in which the airlines could achieve greater competitive advantage. However, Rahman's thesis did not discuss the age demographics of air travellers. Forgas, Palau, Sanchez and Huertas-Garcia (2012) studied the generational effects of e-loyalty on airline operations; however they did not address the perceptions of tourism industries' stakeholders in that regard. Finally, Bratlie and Jotne (2012) studied the determinants of capital structure in various airlines; however this did not include generational studies nor did it address the perceptions of tourism industries' stakeholders in any regard.

Airlines such as Air China, Lufthansa and El Al Israel Airlines have been upgrading and modernising their services and products for the last two decades (Ahmed, Zairi & Almarri 2006; Bruch & Sattelberger 2001; Herstein & Mitki 2008). However these practices and acts of modernisation were not related to the growing number of baby boomers travelling by air, and nor were they related to the various stakeholders of the Australian tourism industries' raising concerns about baby boomer air travellers. Accordingly, it is important to understand this issue if stakeholders of the Australian tourism industries are to be ready to handle the growing number of baby boomers flying. Such an understanding may be of interest to the airlines should they wish to achieve dynamic capabilities in their operations – that is succeed in meeting clients' changing requirements (especially the requirements of the growing baby boomer cohort) as it could lead to ongoing product purchases and thus sustainability for the airlines, in an increasingly competitive industry.

It is important to understand perceptions of baby boomers in addition to actual behaviour because:

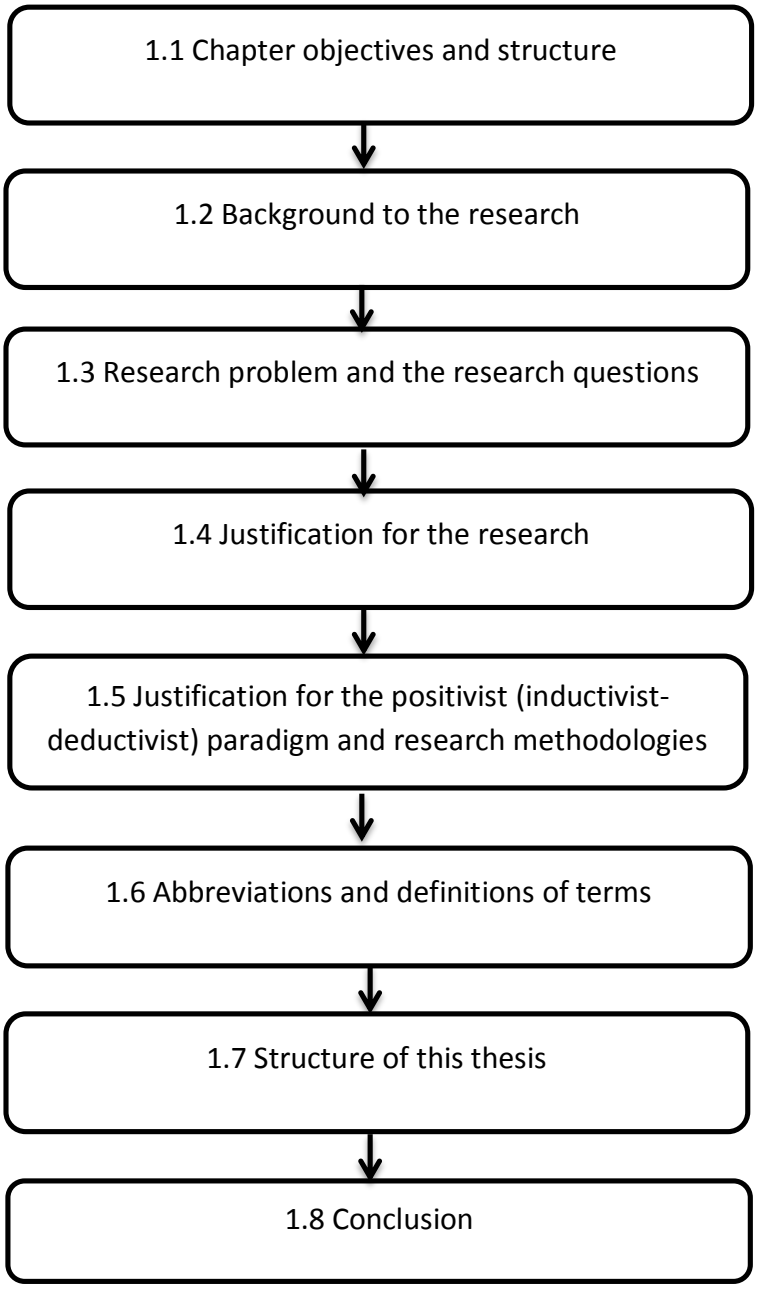
1. Many baby boomers are entering a stage where they will increasingly pursue leisure activity involving flight, therefore their current opinions are based on perceived reality rather than extensive experience;
2. The tourism industries need to understand whether consumer perceptions match their own in regards to key services within the industries;
3. Perceptions of users are far more important than what industries' providers may see as the reality of their service provisions. Where gaps exist between perception and reality the communication and delivery of key services is clearly an issue for managers to consider.

The research theme which drives this thesis is "*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"?

A primary objective of Chapter 1 is to provide a detailed background to the issues which lead to the detailed investigation of the research problem. The justifications for this research and a description of the qualitative methodology and data analysis are also discussed. Additionally, this chapter covers the contribution to knowledge of this thesis. The structure of Chapter 1 is depicted in Figure 1.1 (over page).

Section 1.2 provides background information and Section 1.3 defines the research problem and identifies the two research questions which emerged as a result of the literature review conducted in Chapter 2. Sections 1.4 and 1.5 serve to justify the research problem and the research methodology applied to investigate that problem. Key terms are defined in Section 1.6 and finally, Section 1.7 outlines the structure of the thesis and Section 1.8 presents a conclusion to Chapter 1.

Figure 1.1: Structure of chapter 1



Source: developed for this thesis

1.2 Background to the research

The ageing of the population, it is argued by Yeoman, Hsu, Smith and Watson (2011) will affect '*everyone and everything in the tourism industry*' (2011, p. 19) and Sedgley, Pritchard and Morgan (2011), in examining the connections between tourism and ageing, stress the importance of researching the requirements of baby boomers in tourism research. The numbers of baby boomers travelling by air in, to and from Australia has been increasing in recent years (BITRE 2008) and many researchers and writers have expressed concern about the ability of Australian tourism stakeholders such as tour operators to provide services capable of meeting the unique requirements of baby boomer travellers (e.g. Browne & LaForge 1984; Glover & Prideaux 2009; Muller & Cleaver 2000).

Concerns over the growing number of baby boomer travellers have been expressed by various government and industry bodies such as the BITRE (Bureau of Infrastructure, Transport and Regional Economics, IATA (the International Air Transportation Association) and Tourism Australia. Accordingly, Australian tourism industry stakeholders are expected to cater for the growing demands and concerns of travellers as the traveller demographics alter. Airlines are no exception to this trend as baby boomers are a major source of airlines' income. Whilst the literature demonstrates that many writers and researchers share similar views in regards to the provision of services to baby boomers, there is a dearth of research into the broad perceptions of Australian tourism sector stakeholders in regard to the readiness of airlines to handle the growing number of baby boomers travelling by air.

What has been established in the literature is that there is widespread concern amongst writers and researchers in regard to the ability of organisations to service baby boomers (e.g. Browne & LaForge 1984; Glover & Prideaux 2009; Muller & Cleaver 2000). This concern has also been found amongst the participants in this thesis. The substantial literature review that was

conducted is discussed in Chapter 2. From a theoretical perspective it was decided to utilise the theory of dynamic capabilities (Teece, Pisano & Shuen 1997; Teece 2007) as a lens to assist in the interpretation of the results to the extent that is feasible within an applied doctorate. The literature describing the factors impacting baby boomers' travelling formed the immediate literature, and is reported in Chapter 2 and used for comparisons with results discussed in Chapters 4 and 5. The findings of this thesis may serve to:

- Supplement the existing knowledge regarding baby boomers and air travel;
- Lead to new statutes for in-flight comfort optimisation;
- Increase understanding of baby boomers' requirements in air travel;
- Further develop air travel products;
- Increase and enhance the growing academic awareness regarding generational requirements in tourism services.

1.3 Research problem and the research questions

The purpose of this research is to identify the perceptions of Australian tourism sector stakeholders in regard to the readiness of the airlines operating to, from and within Australia to handle the growing number of baby boomers flying. To define the meaning of *industries' stakeholders*, the theories developed and utilised by Leiper (2008) are applied. Leiper stipulates that tourism is not one rigid *industry* but rather an amalgamation of *industries* which work together to form the *tourism industries*. Identifying every possible one of the multiple industries which form the tourism industries is beyond the scope of this thesis and so therefore identifying the industries' stakeholders relevant to this research was required. Additionally, selecting and conducting interviews (and coding the results) with participants from every possible tourism sector would be beyond the resources of this thesis. Therefore for the

purposes of this thesis, the Australian tourism sector stakeholders (from which participants were drawn for the data extraction discussed in Chapter 4) are:

- Airports' managements (international, domestic and regional)
- Baby boomer travellers
- Coach operators
- Cruise lines
- Tourism industries' associations and councils
- Tourism education providers
- State government tourism bureaus
- Travel agencies and tour operators
- Travel insurance companies.

In this thesis, the term '*stakeholders*' is applied in a broad sense to include the abovementioned categories within tourism. From these tourism industries' components (with the exception of baby boomers), managers or executives were approached for in-depth interviewing. Baby boomers were asked to present their personal perceptions as they did not partake as employees or managers/executives of organisations. With the aim of determining if the tourism industries' stakeholders listed above did indeed have views on the readiness of airlines to handle growing numbers of baby boomers flying, the following research questions were devised after a comprehensive review of the literature and were applied and asked to a total of 32 participants:

Research question 1: "*How does the growing number of baby boomer air travellers impact the civil aviation industry*"?

Research question 2: "*Do the Australian tourism industries' stakeholders think that the airlines are ready for the operational and organisational changes identified in the literature which this may require*"?

1.4 Justification for the research

With the falling birth rates in many nations including Australia, many issues associated with ageing populations have become prevalent in academe. Travel and tourism have been no exception and inevitably, the ability of organisations from a variety of industries to compete and achieve profitability has become increasingly challenging. Academic writings have identified many issues associated with baby boomer consumers, such as:

- the ability of baby boomers to utilise technology; such as web-based purchasing of products – goods and services (Chang & Yang 2008; Cho & Fioriti 2010; Lu, Chou & Ling 2009);
- the physical abilities of baby boomers to move around locations such as airports and within aircraft (Gardner 2003; Rayman 1997);
- in-flight demands including comfort (Ehrenmam 2005; Park, Robertson & Wu 2006; Vink, Bazley, Kamp & Blok 2012);
- the levels of customer service demanded by baby boomers at airports (Briones & Nguyen 2007; Caves & Pickard 2001; Drennen 2011; Edwards 2005; Müller & Gosling 1991).

Whilst it may be difficult to ascertain the exact number of baby boomers travelling by air around, into and out of Australia, the indications are that baby boomers do constitute a sizeable portion of air travellers. Roy Morgan Research (2005) estimates that baby boomers

accounted for approximately 40% of the total Australian traveller market to the Asia-Pacific region in 2004, and that they spent approximately $AUD4.1 billion during their travels.

No writings were found which examine the perceptions of Australian tourism industries stakeholders with regard to the readiness of airlines operating to, from and within Australia to handle the growing number of baby boomer air travellers. It is these perceptions which this thesis will examine qualitatively through in-depth semi-structured interviews. This thesis contributes to the existing knowledge of the perceptions of Australian tourism industries' stakeholders with regard to the readiness of the airlines to handle the growing number of baby boomers flying, through the analysis of (i) the findings in the immediate literature (Chapter 2) and (ii) the findings extracted from the research participants (*n*=32).

The research will use the field of change management, dynamic capabilities, as the lens with which to interpret the findings. Dynamic capabilities is a branch of change management which examines the abilities of organisations to adjust to shifting environmental factors such as the changing demographics of customers and increasing deregulation.

1.5 Justification for the positivist (inductivist-deductivist) paradigm and qualitative research methodologies

A paradigm and its methodology are justified and informed by the ontological and epistemological views of the researcher. A paradigm may be regarded as a set of basic metaphysics in which the individual's place in the world is defined (Guba & Lincoln 1994; Kuhn 1962, quoted in Slevitch 2011, p. 74), or as a '*patterning of the thinking of a person … an exemplar or model to follow according to which design actions are taken*' (Groenewald 2004, p. 6).

Whilst deductive theory testing is generally a methodology within the quantitative paradigm, it has been proposed as useful in qualitative research (Bitektine 2008). In inductive theory testing conclusions are derived '*from observations or a set of data*' (Ormerod 2010, p. 1210). Ontology refers to the nature of reality (Barbier 2011; Slevitch 2011) or existence (Duberley, Johnson & Cassell 2012); that is, it examines the questions of what can be known about it. Epistemology asks; what is the nature of the relationship between the researcher and the researched. And what may be known about this relationship? It may be regarded as being concerned with knowledge about knowledge (Duberley et al. 2012). Epistemologically, a positivist paradigm seeks to establish findings as being true and methodologically may be used to test hypotheses (Barbier 2011; Guba & Lincoln 1994).

Hancock (2002) stresses the importance of qualitative research in explicating answers to the 'why's', 'how's' and 'what's' (the social phenomena) of research as they occur. '*Qualitative research is concerned with the opinions, experiences and feelings of individuals producing subjective data*' (Hancock 2002, p.2). To extract such subjective data, a qualitative research methodology utilising semi-structured in-depth interviews was applied in this thesis which focused on an area which at the time of research had not been a widely researched topic therefore qualitative research utilising a positivist approach was required to uncover '*strategic patterns that hold across different venues with different actors*' (Lin 1998, p. 162). In this thesis, those *actors* are the 32 participants extracted from nine tourism industries' stakeholder organisations.

Quantitative research would have not been appropriate for this research owing to the requirement to extract understandings of deep-rooted phenomena. The methodology applied enabled the acquisition of rich and in-depth textual (narrative) data. Qualitative methodologies abound; the reasons why in-depth semi-structured interviews were deemed appropriate for this thesis were:

- Avoidance of being caught in methodolatry (as discussed by Caelli, Ray & Mill 2008) in which new researchers become trapped in trying to conform to various methods and potentially lose focus of their real research goal;
- To permit a free flow of data collection and analysis followed by coding and theory determination (e.g. Shah & Corley 2006; Bryman 1984; Morse & Richards 2002);
- To gain an in-depth understanding of the essences behind the experiences of various participants.

1.6 Abbreviations and definitions of terms

The terms utilised in this thesis have been defined differently by researchers and writers. Additionally, a number of acronyms are utilised throughout the thesis. The definitions of the major terms and acronyms are:

ABS: Australian Bureau of Statistics
Australian civil aviation industry: Scheduled and charter passenger airlines operating to/within/from Australia, based in Australia or abroad.
Australian tourism industries: A group of industries (including airlines, ground operators, tour operators) which work together in a system to form the '*tourism industries*' (Leiper 2008).
Baby boomers: Defined by the ABS as being those persons born between 1946 and 1964.
BITRE: Bureau of Infrastructure, Transports and Regional Economics.
CANZUS: Canada, Australia, New Zealand, United States (Cleaver, Muller, Ruys & Wei 1999).
DIT: Department of Infrastructure and Transport.
DVT: Deep vein thrombosis
Dynamic capabilities: Defined by Teece (2007) as '*the firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments*'.
LCC: Low cost carrier (budget airline)

Purposive sampling: a type of sampling in which the researcher procures data from participants who serve a specific purpose consistent with a study's main object of study (Collingride & Gantt 2008; Polkinghorne 2005; Starks & Brown Trinidad 2007; Thomson 2011).

SST: Self-service technology.

Strategic management: Amason (2010) defines strategic management as '*a framework for analyzing the environment, for integrating the firm's activities, for learning and adapting to change, and for creating value both in the present and into the future*' (p. 7).

TCF: Travel compensation fund

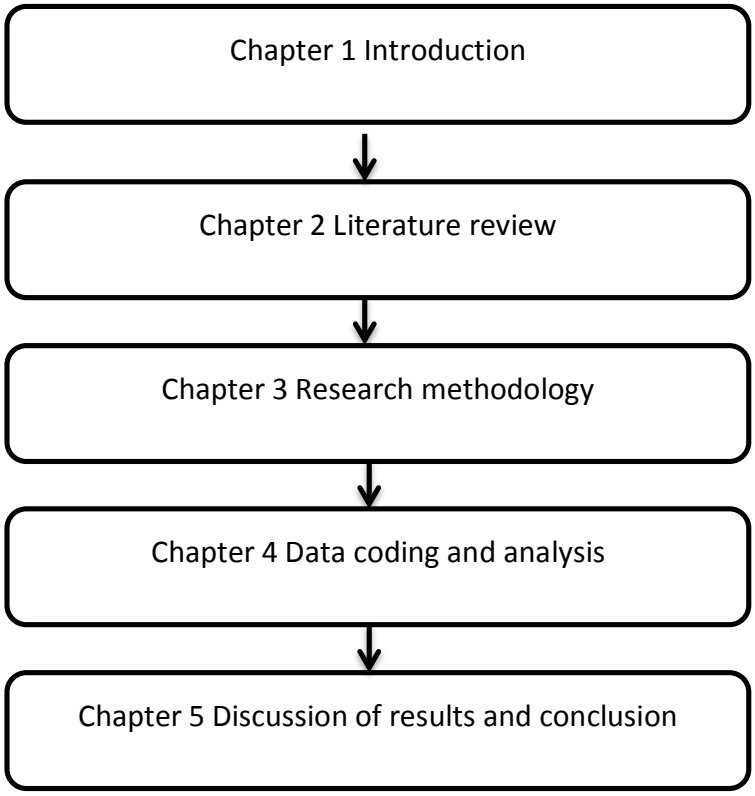
TFC: Tourism forecasting committee.

TRA: Tourism Research Australia.

1.7 Structure of the thesis

This thesis applies the model proposed by Perry (1995) and has five chapters depicted in figure 1.2, over the page.

Figure 1.2: Structure of this thesis



Source: developed for this thesis

Chapter 1 discusses a background, introducing the research topic with a broad overview of the actual research topic, *what are the perceptions of Australian tourism sector stakeholders with regard to the readiness of the airlines to service the increasing number of baby boomers flying?*, and the associated research questions. Chapter 1 also discusses the importance of this research, justifying the chosen qualitative semi-structured in-depth interviewing methodology, the contributions of the study and the structure of the thesis. Chapter 2 presents an in-depth literature review. It serves to analyse the research topic's parent disciplines namely strategic management and dynamic capabilities and concludes with the development of a theoretical framework and the research question.

Chapter 3 details the methodology and outlines the selection and justification of the purely qualitative research methodology, the limitations associated with semi-structured in-depth interviewing, ethical considerations and the conclusions to the methodology. Chapter 4 engages the data analysis methods to analyse the research problem. Individual in-depth semi-structured interviews (face-to-face and phone) were contextually analysed using an interview instrument (see appendix) developed for the purposes of this research in Chapter 3. The interview instrument, a semi-structured interview survey with an amalgam of research questions and associated interview questions was developed. Qualitative coding, in which codes and themes were developed to codify the data were developed, was applied.

Chapter 5 compares the research findings of chapter 4 with those of the parent literature reviewed in Chapter 2. Conclusions to the research problem are established in Chapter 5. This is followed by a discussion of the contributions and new knowledge developed from this thesis as well as the implications of the research findings and potential future research directions. Limitations of this research and a chapter summary conclude chapter 5.

1.8 Conclusion

Chapter 1 introduced the topic: "*How do Australian-based tourism stakeholders perceive the readiness of the aviation Industry to handle increasing numbers of baby boomers flying*"?
In the next chapter, a comprehensive literature review of the related disciplines is presented.

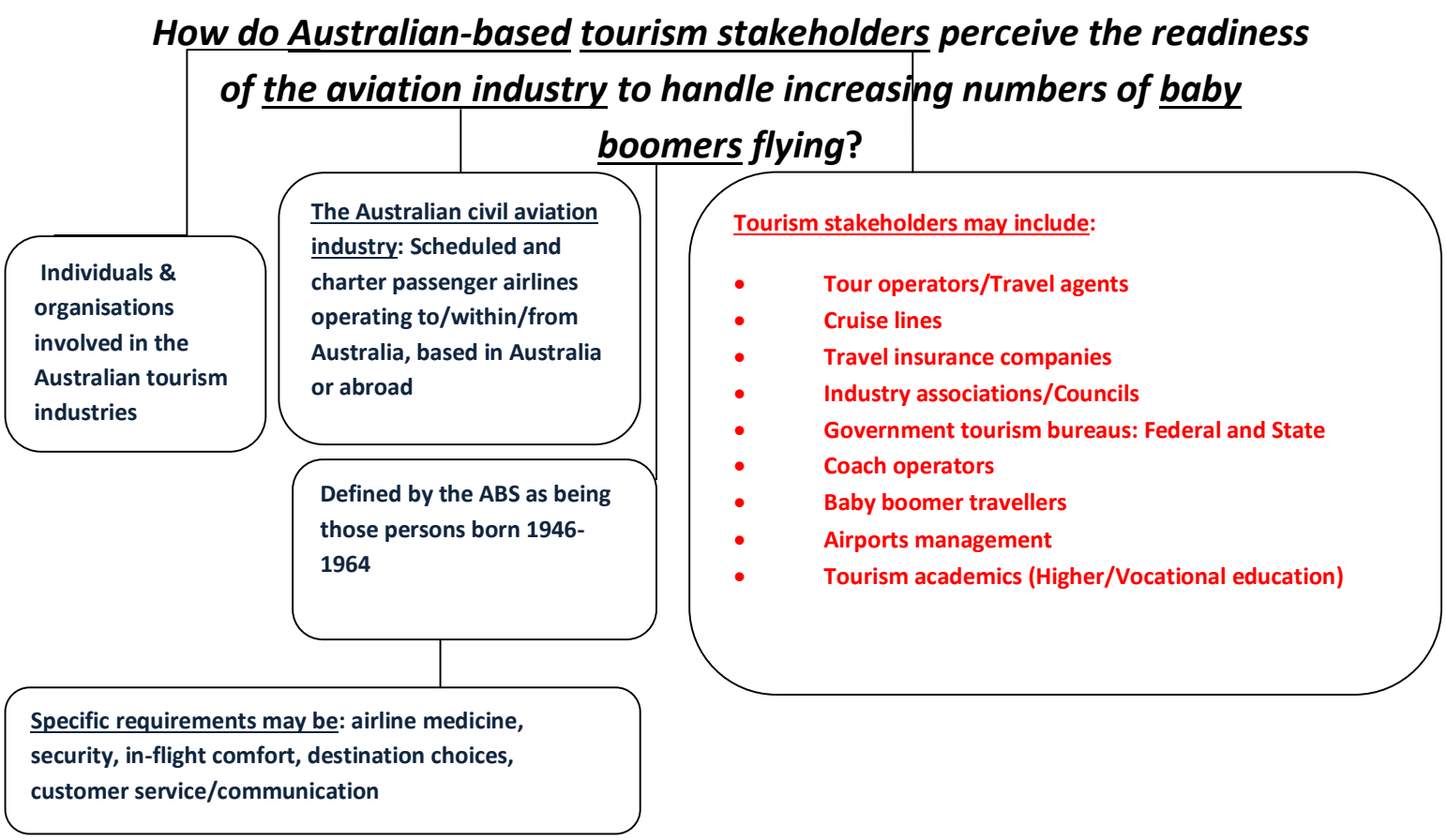
CHAPTER 2

LITERATURE REVIEW

2.1 Introduction

This chapter commences with a discussion of the major academic literature concerning the aviation Industry, followed by treatment in the literature of the increase in the number of baby boomer travellers flying. We then proceed to a consideration of possible parent literatures which give either a theoretical base for this research or a lens to assist in the interpretation of the research results pertinent to this thesis. After conducting the literature review it was decided to utilise three parent literatures, being (i) strategic management (ii) dynamic capabilities and (iii) stakeholder theory as the lenses for the interpretation of the results of this thesis. The chapter then proceeds to review a wide range of academic literature which relates to the increased numbers of baby boomer passengers travelling by air and assembles this under themes. After this the chapter covers the thinking which identified a gap which was addressed by this study. This research has been designed as a qualitative exploratory study as the field is so broad and it provides data and insight which should prove useful to future researchers who may wish to delve into specific aspects covered or quantify certain issues. Figure 2.1 (over page) presents the research question model for this thesis.

Figure 2.1: Research question model



Research questions

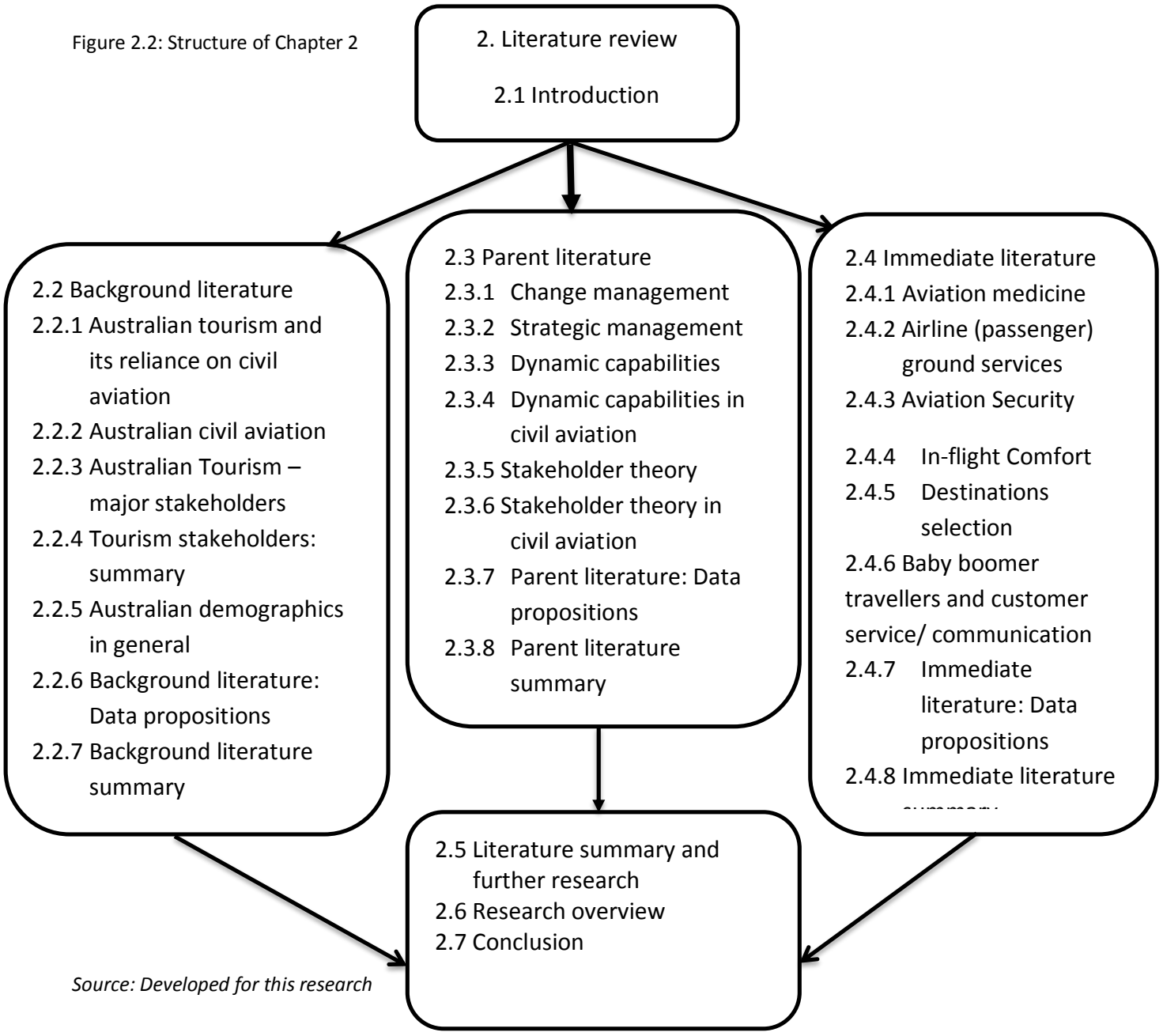
RQ1. ***How does the growing number of baby boomer air travellers impact the civil aviation industry?***

RQ2. ***Do the Australian tourism industries' stakeholders think that the airlines are ready for the operational and organisational changes identified in the literature which this may require?***

Source: Developed for this research

The data propositions pertinent to this research will also be discussed in this chapter; i.e. the data which is expected to be extracted in this thesis' results as a result of analysis of the participants' responses. Figure 2.2 presents the structure of Chapter 2.

Figure 2.2: Structure of Chapter 2



Source: Developed for this research

2.2 Background literature

Many writers agree that the tourism industry is not one large rigid unit, but as Driml, Robinson, Tkaczynski and Dwyer (2010), Goodenough and Page (1993), Leiper (2008) and Williams and Jantarat (1998) argue, it is an amalgamation of multiple components (tangible and non-tangible products and services such as airlines, hotels, coach companies, restaurants, theme parks, and many more) which loosely form the tourism industry (or *industries*). This is rigorously argued by Leiper (2008) who stipulates that the *tourism industry* as a generic expression is *misleading* and further stipulates that the unitary expression is '… *overly simplistic, mistaken and misleading*' (p. 237). Leiper (2008) further discusses three positions held by academics with regards to expressions relating to tourism (p. 238);

a) '*Some academics reject the idea of any industry directly linked with tourism*';
b) '*The majority says that there is an industry, just one*';
c) '*A third alternative is catching one, to date relatively few writers to multiple tourism industries'*.

However, Leiper (2008) continues to explicate that many suppliers of components to tourism abound. These include accommodation, transport, entertainment and food (to identify a few). Leiper then proceeds to argue that such suppliers are not only in the practice to providing services to tourists alone and furthermore, the suppliers would not know (nor need to know) how much money tourists would have spent on those services. Leiper (2008, p. 240) then expounds that '*If many suppliers of services and goods do not know or need to know how much of their income comes from tourism, there is no point in assuming that they have, or should have, business strategies and industrial affiliations for tourism*'. This pluralist view regarding tourism will be applied in this thesis.

This background literature section discusses some of the important government initiatives in the field of civil aviation as a part of the tourism industries as a whole, documented in BITRE's *National Aviation Policy Green Paper* (BITRE 2008), Tourism Forecasting Committee (TFC) reports (2009; 2010; 2011; 2012), the Tourism Research Australia's (TRA's) *Tourism White Paper* (TRA 2003) and *Looking through the glass: the future of domestic tourism in Australia-2008*. General demographic information is obtained from the ABS. In addition, the examination of the background literature discusses statistics associated with tourism and aviation in Australia.

Many developed nations have experienced changing trends in civil aviation and Australia is one of those nations liberalising its air traffic agreements in moves such as the implementation of the *open skies* policy with the United States (BITRE 2008; Compart 2008; Creedy 2008). This move to increased liberalisation, coupled with other factors such as larger passenger aircraft has meant potentially more tourism (and other visitations) for Australia (BITRE 2008; Rayman 1997). As air traffic (and subsequent tourism) to Australia increases (and with it, the arrivals of older tourists) the civil aviation industry is challenged with meeting the requirements of a core group of users: older travellers including baby boomers.

2.2.1 Australian tourism and its reliance on civil aviation

As over half of the air passengers travelling to, from and within Australian on civilian aircraft are classed as tourists, this subsection discusses the importance of civil aviation to Australian tourism. Dates discussed are based on calendar years, unless specified as a financial year.

The TRA in its tourism white paper (TRA 2003) establishes that the Australian tourism industries require an aviation sector able to cope with the growth in international visitor numbers. The TFC stresses aviation's importance in its March 2009 (TFC 2009) report, citing Australia's geography and location (for international travellers) and the size of the country and its

relatively sparse population (for domestic travellers) as the well as the increases in aviation capacities between Australia and the United States, the People's Republic of China and Indonesia (TFC 2011). Moreover, of the 5 817 261 short-term arrivals to Australia in the 2012–13 financial year, 2 595 177 (45.0%) were for holiday purposes (TRA 2013a). For the 2013–14 financial year, it is forecast that inbound arrivals will reach 6 517 000 persons (TRA 2013b). Globally over 40% of tourists travel by air and accordingly the provision of air transport is indispensable for tourism (ATAG 2008).

Since aviation deregulation by the Hawke Government in 1988, successive Australian governments have continued to liberalise civil aviation markets (BITRE 2008), but there are still many factors which have a significant effect on it, such as ' *high fixed costs, intensive and expensive demand for capital and operational complexity*' (TRA 2003, p.45).

Australian tourism, a major service industry was forecast to grow (from the end of 2010, especially with respect to tourists from the People's Republic of China, India and the domestic market - TRA 2009). The TRA in its June 2013 report (published September 2013), reported 646 779 inbound (short term) arrivals to Australia for the 2012–13 financial year from the People's Republic of China (PRC), an increase of 17.42% on 2011–12 which experienced 551 000 arrivals (TRA 2013a). The TRA (2013a) projects 746 000 arrivals from the PRC for the 2013-14 financial year. The 2012-13 financial year arrivals from the PRC were second after arrivals from New Zealand, during that same financial year, at 1 086 974 persons (TRA 2013b). The TRA (2013b) forecasted increases in 2013–14 (compared to 2012-13) in inbound leisure arrivals from Singapore (241 000 arrivals, an increase of 5.2%), Malaysia (231 000 arrivals, an increase of 10.5%) and India (103 000, an increase of 9.5%). The increasing ability of nationals of India and the People's Republic of China to engage in leisure travel is due to the increasing size of the middle-income classes in those nations (Tsiotsou & Ratten 2010). The total inbound tourism expenditure (TITE) in Australia (measured in Australian dollars) for the 2012-13 financial year

was $28 billion dollars, with a projected TITE of $29 billion in the 2013–14 financial year (TRA 2013b).

2.2.2 Australian civil aviation

Not only is civil aviation an important component of the Australian tourism industries (being worth $AUD6.4 billion or 0.6 % of GDP to the Australian economy and employing over 50 000 staff), but the nation's Civil Aviation Safety Authority (CASA) manages 11% of the world's controlled airspace, second in size only to that of the United States (BITRE 2008).

In the 2012-13 financial year the increase in air travellers going to and from Australia's various international airports, with 54 international scheduled airlines (including 5 dedicated freight airlines – this figure does not include airlines operating on codeshare agreements) amounted to 30 308 536 persons in comparison to 28 882 348 persons in the 2011-12 financial year. This represents an increase of 5.5% (BITRE 2013b). The Qantas Group held a 25.3% share of this figure (17.2% and 8.1% for the Qantas brand and the Qantas low cost subsidiary Jetstar, respectively). BITRE (2013b) also reported that the national carrier was followed by Singapore Airlines (9.1%), Emirates (8.8%) and Air New Zealand (7.9%). Virgin Australia held a market share of 8.1% according to the same BITRE report (2013b), which also reported that LCC's Air Asia X, Jetstar, Jetstar Asia, Tigerair and Scoot, accounted for 14.1% of total international traveller market share to/from Australia as at July 2013, in comparison to the LCC market share of 14.3% in July 2012, a slight reduction. Australian civil aviation is expected to grow in response to forecast tourism growth. Movement through Australian airports is expected to increase by an average of 4% annually until 2025, according to BITRE and furthermore, the federal government continues to seek expansion of aviation capacity agreements with other governments ahead of anticipated growing demand in the global civil aviation markets (BITRE 2008). Furthermore, IATA (2013) reported that despite 2 years of slow growth in global civil

aviation, in 2012 civil aviation outperformed a weak global economy in which a 5.3% growth was 2.5 times global GDP, in comparison to the usual 1.8 times annual growth of the last 20 years.

2.2.2.1 Domestic/Regional civil aviation

Demand for domestic civil aviation in Australia is also increasing. BITRE (2008) estimates that growth in domestic traveller movement is 14 times the national population growth rate (as a measure of propensity to fly). In 1958, when the Australian population numbered 9.95 million people, Australians undertook 2.3 million air trips, meaning that only 1 in 4 people flew. In 2007, with a population of 21.2 million, the number of annual air trips undertaken by Australians increased to 69.5 million or 3.3 flights per capita (BITRE 2008). See Figure 2.3 (over page).

Domestic civil aviation during the 2012-13 financial year witnessed the carriage of 57.33 million air travellers on the nation's domestic scheduled air routes representing an increase of 3.9% on the figure of 55.16 million air travellers, the previous 2011-12 financial year (BITRE 2013a). A major contributor to this growth has been an application of free-market principles and a surge in competition amongst LCCs such as Jetstar and Tiger Airways. These LCCs have not only contributed to growth on trunk routes, but have introduced low-fare jet services to many Australian regional centres. Cabotage (also known as '*eighth freedom*'), a system by which foreign-owned airlines operate domestic routes in nations external to their own, (such as Singapore-owned Tiger Airways which operates on some domestic Australian routes) is sanctioned in Australia (BITRE 2008).

Although the number of regional airports in Australia fell from 278 in 1984 to 170 in 2005, regional air traffic has been increasing at a steady 4.4% annually over the same period (BITRE

2008). See Figure 2.3 (over page) for BITRE's graphical presentation of the increasing use of civil aviation in Australia.

Figure 2.3: Passenger journeys by Air: Australia, 1958-2007

Source: BITRE (2008)

2.2.2.2 Skills/Competence of aviation staff

In conjunction with predicting future growth for Australian aviation, BITRE (2008) also raised particular concerns regarding the competence of civil aviation management especially in rural and regional Australia. Whilst demographic issues (regarding civil aviation consumers) were not specifically explored, the report did state that many employees in the aviation industry lacked the skills required to adapt to Australia's ongoing demographic changes and industry growth

and specifically, the supply of competent air crew and airport security and ground engineering staff were discussed. These occupations are amongst those which benefited under the federal government's productivity places program, *Skilling Australia for the future* (BITRE 2008, p.15). As the Australian Government continues with measures to reduce regulatory impediments to the viability of aviation (and avoid having to subsidise the industry financially so as to avoid a return to protectionism), the civil aviation industry is presented with the challenge of sustaining a competently skilled workforce which is responsive to the requirements of consumers (BITRE 2008).

2.2.3 Australian tourism – major stakeholders

In section 2.2, the plurality of the *tourism industries* was introduced. In this immediate subsection, I have identified a number of tourism stakeholders, including some discussed by Leiper (2008) and will discuss them in more detail as they form a central focus in trying to better understand their perceptions of civil aviation's readiness to handle the growing number of baby boomer air travellers to, from and within Australia.

2.2.3.1 Airlines

Globally, 2.2 billion passengers travelled by air in 2008 on over 2 000 airlines operating 23 000 aircraft (ATAG 2008) and this figure was 2.6 billion in 2010 (ATAG 2012). The Air Transport Action Group (ATAG) stresses the economic importance of airlines, arguing that they are the only modes of passenger transport which pay (via charges and taxes) for their own infrastructure, such as airport facilities. Additionally, despite the rising global prices for fuel, Australia has experienced a growth in its civil aviation industry (BITRE 2008; 2009; Walker & Stevens 2010).

Some airlines flying to Australia operate under codeshare arrangements with other airlines. A codeshare agreement is described by Gayle (2006) as a contractual agreement '*among airlines that allows a carrier, called the ticketing carrier to effectively market and sell seats on its partner's plane for segments of a route operated by its partner, the operating carrier*' (p. 1). For example, if Qantas codeshares with British Airways from Sydney to London, it could mean that British Airways operates the flight (i.e. British Airways is the *operating carrier*) on which Qantas purchases a number of seats which it sells under a Qantas flight number (i.e. Qantas Airways is the *ticketing carrier*).

I will now discuss and highlight Australia's portion of civil aviation in the domestic and global arenas, in the next two subsections. I segment the civil aviation market into the domestic/regional (Australian) and international segments.

2.2.3.1a Domestic and regional airlines

Prior to the introduction of deregulation in the domestic airline industry in 1988, only two domestic airlines operated in Australia: Qantas Airways and Ansett Australia. Domestic airfares were set by the Commonwealth Government's Independent Air Fares Committee (IAFC) and the airfares were almost identical for the two interstate carriers. The former Bureau of Transport and Communications Economics (BTCE) reported in 1995 that the major benefits of airline deregulation in Australia included lower average airfares, more people travelling by air, increased competition, more efficient carriers and continuing aviation reform (BTCE 1995). The nation now has more than just two major airlines, including the Singapore-based Tiger Airways. BITRE identifies Australia's major domestic airlines as Qantas, Jetstar, Virgin Blue and Tiger Airways (BITRE 2010). There are a total of 31 domestic and regional airlines registered with CASA as being Regular Public Transport (*RPT)* airlines with scheduled services (CASA).

2.2.3.1b International airlines

A total of 54 international airlines (including five cargo carriers, but not including codeshare airlines) are licensed by Australian authorities to operate scheduled flights to and from Australia (BITRE 2014), under arrangements referred to by BITRE as *bilateral systems* in which airlines registered in countries (currently 68) with such arrangements (inter-governmental agreements, in this case with the Australian Government) may fly to Australia (BITRE 2008). Figure 2.4 (over page) is a synopsis of international airline activity published by BITRE (2013b) illustrating the share of passenger carriage by the top 10 international airlines, operating in and out of various Australian international airports during the 2012-13 financial year. Note that two LCC airlines, Malaysian-based Air Asia X and the Qantas subsidiary Jetstar, held a joint 11.1% market share (i.e. 3.0% and 8.1% respectively). The fact that the LCC models were not as prevalent in the previous 10 years demonstrates a growth in LCC demands in the Australian domestic and international civil aviation market.

Figure 2.4: Top 10 airlines operating to/from/within Australia

Source: BITRE (2013b)

2.2.3.2 Airports

According to CASA and in accordance with the Civil Aviation Safety Regulation, part 139 (CASR 139), there are 141 registered and 190 certified aerodromes in Australia, as at October 2013 (CASA 2013). Whilst efforts were made to specify the number of airports in Australia facilitating the movement of passengers, hard figures based on all airports were not readily available after personal telephone contact with bureaucrats from CASA, BITRE and Air Services Australia.

As with similar moves in other countries (Gillen 2010; Prebezac, Mikulic & Jurkovic 2010; Salter 2007), airports in Australia have been undergoing privatisation. Between 1997 and 2002 after the passing of the *Airports Act (1996),* 22 Australian airports were privatised on 99-year leases, thus relieving the federal government of the burden of financing the airports. This has led to the diversification of revenue sources for airports. In addition to aeronautical activities they now include retail and commercial services, leading airports to become business centres

(Hooper, Cain & White 2000; Stevens, Baker & Freestone 2010; Walker & Stevens 2010). Gillen (2010) further discusses the airside (runway, apron and terminal gates usages) and non-aviation (monies from retail and commercial activity) revenues raised by airports. Thus, Australia's airports contribute to the national economy through financial gains, the creation of employment, their involvement in travel and tourism (Assaf 2010; Abbott & Wu 2002) and the creation of local urban infrastructures (Stevens et al. 2010). Assaf (2010) further discusses the attention which airports receive from government and researchers alike due to their ability to influence traveller perceptions through aspects such as efficiency, especially since the privatisation of many of the nation's airports, although airport land does remain federal government territory (Stevens et al. 2010).

Table 2.1: Passenger movements through Australia's airports 1991-2031

	Actual 1991–92	Actual 2010–11	Forecast 2030–31	1991–92 to 2010–11	2010–11 to 2030–31
Airport	*(millions)*			*(per cent)*	
Capital city airports					
Sydney	15.2	35.8	72.0	4.6	3.6
Melbourne	10.4	28.0	60.4	5.4	3.9
Brisbane	6.7	19.9	45.1	5.9	4.2
Adelaide	3.0	7.3	13.5	4.7	3.1
Perth	3.1	10.9	25.7	6.9	4.4
Hobart	0.7	1.9	3.5	5.6	3.0
Darwin	0.6	1.8	4.2	6.3	4.2
Canberra	1.4	3.2	6.1	4.7	3.3
All capital city airports	41.0	108.9	230.5	5.3	3.8
Non-capital city airports					
Newcastle	0.1	1.2	2.2	17.9	3.1
Cairns	1.8	3.9	8.0	4.1	3.7
Gold Coast	1.5	5.5	13.1	7.1	4.4
Townsville	0.5	1.6	3.4	6.6	3.7
Launceston	0.5	1.2	2.0	5.0	2.7
Five airports total	4.3	13.4	28.7	6.1	3.9
Other airports	5.3	12.8	20.1	4.8	2.3
All non-capital city airports	9.6	26.2	48.8	5.4	3.2
All airports	50.6	135.1	279.2	5.3	3.7

Sources: BITRE (2011) and BITRE estimates.

Source: BITRE (2012)

BITRE projects passenger movements through Australian capital airports (Sydney, Melbourne, Brisbane, Adelaide, Perth, Hobart, Darwin and Canberra) to reach 230 500 000 passengers annually by 2030–2031, an average annual increase of 3.7% on the 2010-11 level of 108.9 million passengers (BITRE 2012). Citing the investments in aircraft on the part of the airlines, the BITRE (2010) report projects that average aircraft sizes servicing the capital airports will increase. The largest increase being for Perth airport, from an average 246-seat aircraft in 2009 to 319-seat aircraft in 2030 with a seat utilisation rate of 74% on international routes.

Sections 2.2.3.2a and 2.2.3.2b are brief explications of the roles which domestic/regional airports and international airports play in Australian tourism.

2.2.3.2a Domestic and regional airports

The BITRE in its (2013a) domestic airline activity report, found an overall increase in passenger movements in 2013 in comparison to 2012, at all but 2 of the nation's top 10 busiest airports, the exceptions being Canberra and Darwin airports, which experienced 4.0% and 0.8% reductions in activity, respectively. Passenger movements through Australia's top 10 busiest airports (2012 and 2013) are shown in Table 2.2 over page.

Table 2.2: Domestic passenger movements through Australia's top 10 busiest airports

	Airport	YE Jul 2012	YE Jul 2013	% Change	% of Total
1	Sydney	24 264.9	25 366.5	4.5	22.1
2	Melbourne	21 523.7	22 841.3	6.1	19.9
3	Brisbane	16 483.7	16 835.7	2.1	14.7
4	Perth	8 620.2	9 102.8	5.6	7.9
5	Adelaide	6 345.5	6 522.4	2.8	5.7
6	Gold Coast	4 640.5	4 971.2	7.1	4.3
7	Cairns	3 574.2	3 723.9	4.2	3.2
8	Canberra	3 137.9	3 011.7	-4.0	2.6
9	Hobart	1 819.5	2 050.8	12.7	1.8
10	Darwin	1 821.2	1 806.0	-0.8	1.6
	Total top ten airports	**92 231.1**	**96 232.3**	**4.3**	**83.9**
	Total domestic network	**110 325.3**	**114 660.5**	**3.9**	**100.0**

Source: BITRE (2013a)

The same BITRE (2013a) report stated that the Sydney–Melbourne route was the busiest of all domestic routes in the 2012-13 financial year with 8 234 400 passengers (representing a 6.0% increase on the previous 2011-12 financial year), followed second and third by the Sydney–Brisbane and Brisbane-Melbourne routes at 4 435 200 and 3 170 000 passengers, respectively (a 2.2% increase and a 0.3% increase respectively on the previous financial year).

2.2.3.2b International airports

The Department of Infrastructure and Transport (DIT) has designated a total of 27 airports across Australia (Including those of Australia's three external territories of Norfolk Island, Christmas Island and Cocos Island) as being international airports. However, it should be noted that only seven of the listed airports are considered as major airports, being those of Adelaide, Brisbane, Cairns, Darwin, Melbourne, Perth and Sydney (DIT 2013). See Table 2.3 (over page).

Table 2.3: Major Australian airports as at 27 February 2013

Airport	Major	Restricted use	Alternate	Non scheduled	External Territory
Adelaide	X				
Brisbane	X				
Cairns	X				
Darwin	X				
Melbourne	X				
Perth	X				
Sydney	X				
Avalon		X	X		
Broome		X			
Canberra		X	X		
Coffs Harbour		X	X		
Gold Coast		X	X		
Hobart		X			
Learmonth		X	X		
Lord Howe Island		X			
Newcastle		X			
Port Hedland		X	X		
Townsville		X	X		
Alice Springs			X		
Kalgoorlie			X		
Launceston			X		
Rockhampton			X		
Tindal			X		
Horn Island				X	
Norfolk Island					X
Christmas Island					X
Cocos (Keeling) Island					X

Source: DIT (2013)

With respect to Australia's international routes, BITRE reported in its 2013 international airline activity report a 5.9% increase in passenger movement in the 2013 calendar year through Australia's international airports in comparison to the 2012 calendar year (BITRE 2014). See Table 2.4 below.

Table 2.4: International passenger traffic through Australian international airports

Airport	Year ended December 2011	Year ended December 2012	Year ended December 2013	% of Total	% Change 2013/12
Sydney	11 748 582	12 369 193	12 933 885	41.3%	4.6%
Melbourne	6 460 958	6 819 242	7 312 143	23.3%	7.2%
Brisbane	4 444 867	4 471 413	4 669 141	14.9%	4.4%
Perth	3 349 468	3 618 768	3 919 840	12.5%	8.3%
Gold Coast	715 863	824 424	864 905	2.8%	4.9%
Adelaide	583 073	650 077	799 585	2.6%	23.0%
Cairns	504 072	511 359	492 091	1.6%	-3.8%
Darwin	326 935	328 714	333 217	1.1%	1.4%
Norfolk Island	10 113	10 089	11 304	0.0%	12.0%
Sunshine Coast (a)	..	5 713	8 405	0.0%	47.1%
Townsville (b)	9 592	..	..	..	..
Port Hedland (c)	1 486	..	..	..	..
ALL AIRPORTS	28 155 009	29 608 992	31 344 516	100.0%	5.9%

Source: BITRE (2014)

2.2.3.3 Coach operators

According to the bus industry confederation (BIC) of Australia, there are over 3000 bus and coach operators in Australia, operating almost 90 000 buses and coaches and employing over 50 000 persons (BIC 2013). The BIC further reports that bus and coach travel accounts for 23% of travel in Australia made by international tourists.

2.2.3.4 Cruise lines

In its 2008 report '*The economic contribution of the cruise shipping industry to Australia*', Access Economics discusses the growing propensity of Australians to take cruises (Access Economics 2008), reporting an annual growth rate of 16.7% since 2002. The report specifically mentions the growing baby boomer generation as a key marketing target for cruise lines as cruises are a higher-end tourism product affordable to the baby boomer market.

According to the Cruise Lines International Association of Australasia (CLIA 2013) a record 694 062 Australians took a cruise holiday in 2012, an 11% increase over 2011 (623 294 persons). The CLIA (2013) established that 36.4% of this figure (252 555 persons) cruised South Pacific destinations. Europe was the largest fly-cruise destination for Australian cruise travellers, at 57 719 persons (8%).

2.2.3.5 Tourism industries associations and councils

Tourism Australia categorises industry associations as either regional or local and states that Regional Tourism Organisations (RTOs) '*establish and promote quality tourism experiences, implementing strategies to ensure their region maximises its tourism potential*' and that Local Tourism Associations (LTA's) '*nurture and strengthen local tourism businesses by liaising with regional tourism authorities and state bodies on behalf of operators*' (Tourism Australia 2013).

The Australian Regional Tourism Network (ARTN) is the peak national body with regard to the representation of local tourism businesses (ARTN 2013; Tourism Australia 2013). The following is a list of some of the major industry associations operating in Australia, according to Tourism Australia (2013).

- AAA Tourism
- Association of Australian Convention Bureaux
- Australian Federation of Travel Agents (AFTA)
- Australian Hotels Association
- Australian Tourism Export Council (ATEC)
- Business Events Council of Australia
- Caravan, RV and Accommodation Industry of Australia (CRVA)
- Ecotourism Australia
- Exhibition and Event Association of Australia
- Hotel Motel and Accommodation Association
- Indigenous Tourism
- International Cruise Council Australasia
- Restaurant and Catering Australia
- Sustainable Tourism Cooperative Research Centre
- Tourism Research Australia
- Tourism and Transport Forum
- Wine Australia.

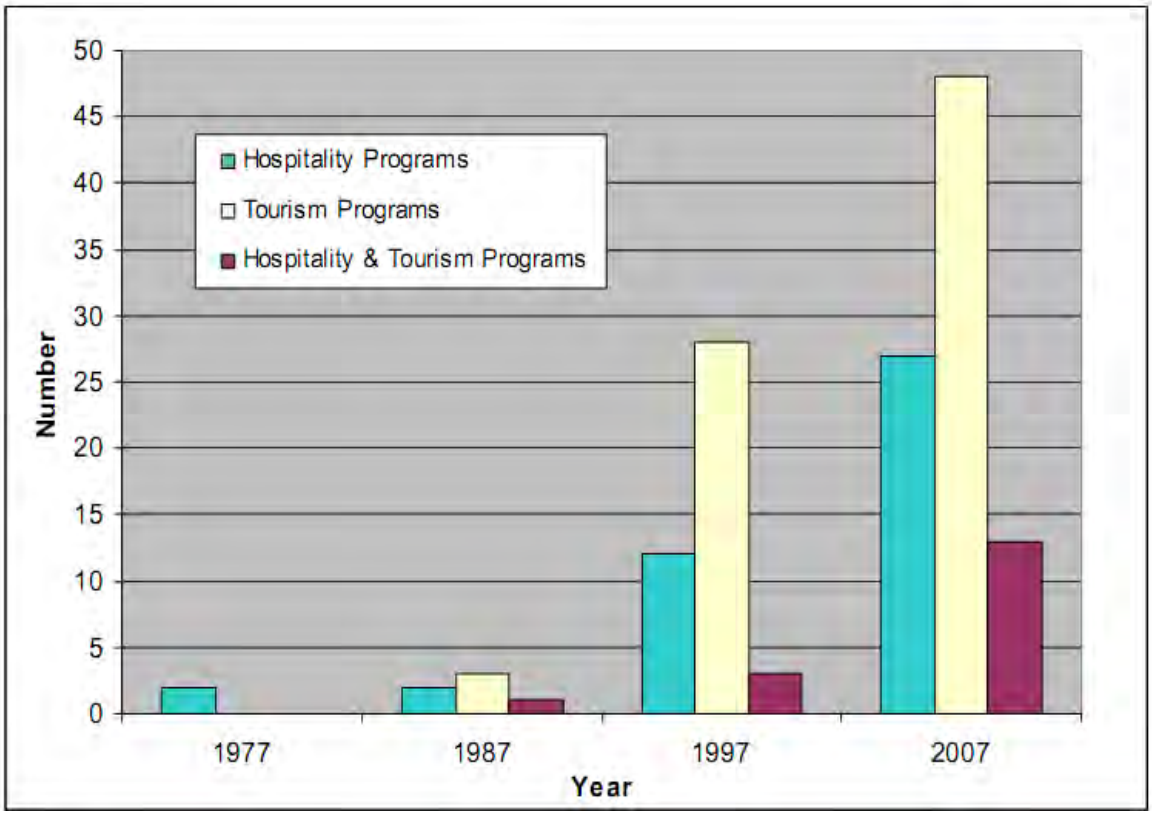
In addition to the associations listed above there are associations representing the aviation industry in Australia. These aviation organisations include (but are not limited to):

- Regional Aviation Association of Australia (RAAA)
- International Air Transportation Association (IATA)
- Aviation Law Association of Australia and New Zealand (ALAANZ)
- Australian and International Pilots Association (AIPA)
- Australian business aircraft association (ABAA)
- Aviation law association of Australia & New Zealand (ALAANZ).

2.2.3.6 Tourism education providers

Tourism as an educational discipline in Australia is taught at 39 federally-funded universities and over 100 state-funded Technical and Further Education (TAFE) colleges (Pearce 2006). According to Breakey and Craig-Smith (2008), 48 higher education institutions – universities and otherwise, across Australia in 2008, offered tourism-focused degree programs. Additionally, a total of 13 higher education institutions offered combined tourism-hospitality programs. This represents an exponential growth since the introduction of such programs in the 1970s and 1980s.

Figure 2.5: Hospitality and tourism programs at Australian higher education institutions in Australia



Source: Breakey & Craig-Smith (2008)

At the time of this research, the University of Queensland's Faculty of Business, Economics and Law (UQBEL) claimed to be the only university amongst the GO8 (i.e. Australia's group of eight frontline universities) with a dedicated tourism school. Furthermore the UQ Tourism School claimed that it was the only such school to be accredited by the United Nations World Tourism Organisation (UNWTO) (UQBEL 2012).

Sheldon, Fesenmaier and Tribe (2011) find a strong nexus between industry and tourism education in which universities produce the staff for industry. Goodman and Sprague (1991, quoted in Prabhu 1996, p.1) discuss the growing abundance of services-based education in the wake of the expanding roles of services industries and their needs to address service requirements, such as skills (Wang, Huyton, Gao & Ayres 2010). Breakey and Craig-Smith (2008) argue that the demand for such programs has been a result of the tourism industries. In addition, tourism education could potentially impact (direct or indirectly) the tourism industries at large (Ayikoru, Tribe & Airey 2009). In contrast, other writers argue that more needs to be done to enhance tourism education. Moufakkir (2010) argues that air travel, despite its importance to tourism, does not receive enough attention from academe as an area of study and Wang (2010) in his Master of Arts thesis (tourism research) finds '*considerable variance between the views of industry professionals and academic providers in Australia*' (p. i). Wang (2010) stresses the importance of tourism education providers in ensuring that the education provided meets the requirements of the tourism industries.

2.2.3.7 State tourism bureaus

At a federal level, Tourism Australia '*is the Australian Government agency responsible for international and domestic tourism marketing*' (Tourism Australia 2013). Its role is to*:*

- *Influence people to travel to and throughout Australia;*
- *Increase the economic benefits to Australia from tourism;*

- *Help foster a sustainable tourism industry in Australia* (Tourism Australia 2013).

Each of Australia's six states and two territories maintains tourist offices. They are:

- Australian Capital Tourism (Australian Capital Territory)
- South Australian Tourism Commission
- Tourism New South Wales
- Tourism Northern Territory
- Tourism Queensland
- Tourism Tasmania
- Tourism Victoria
- Tourism Western Australia.

The role of the state and territory tourism offices is to '*support the development and marketing of sustainable tourism destinations and experiences within their state, to increase awareness and attract visitors*' (Tourism Australia 2013). Tourism Australia and the various state tourism bureaus maintain offices nationally and internationally.

2.2.3.8 Travel agencies and tour operators

The Travel Compensation Fund (TCF) is the primary provider of compensation to travellers who suffer financial loss as a result of the collapse of a travel agency in Australia. The TCF monitors the financial performance of travel agencies as a means of guarding against financial failures and membership of the TCF is compulsory for Australian travel agencies. According to the TCF, as of January 2013, there were 3 054 licensed travel agencies (including tour operators and wholesalers) who sold airfares and/or ground packages valued at more than $AUD50 000. If an agency fits either of these criteria TCF membership and travel licensing in all Australian states is

mandatory. Altogether, these agencies have 1708 branches, and a total of 4 762 licensed locations nationally (TCF 2013). See Table 2.5 below.

Table 2.5: Prevalence of travel agency operations in Australia

States	Head Offices	Branches
Australian Capital Territory	25	41
New South Wales	1285	509
Victoria	817	397
Queensland	463	414
South Australia	173	133
Western Australia	264	184
Tasmania	27	30
TOTAL	3054	1708

Source: *TCF (2013)*

According to the ABS's *Tourism Satellite Account* (2013b), travel agencies and tour operators injected a total of $AUD1.473 billion into the Australian economy, in terms of direct tourism GDP in the 2011–12 financial year, representing an increase of 5.1% over the $AUD1.402 billion figure of the previous 2010-11 financial year (ABS 2013b). Travel agents will gradually become subject to more pressures as baby boomers become more confident with utilising IT for travel arrangements (Patterson 2008) and for those agents (and tour operators-booked through agents directly) more understanding of the unique requirements of baby boomer travellers will be required (Hung & Petrick 2009). Additionally, Batra (2009) argues that baby boomers are increasingly of interest to travel agents.

2.2.3.9 Travel insurance companies

Compare the market (CTM 2013) advises the presence of 21 travel insurers in the Australian travel insurance market. Additionally, the Australian Prudential Regulation Authority (APRA) in its August 2013 statistics, reported that during the April-June 2013 quarter, the insurance industry in Australia totalled a figure of $11 663 000 000 in gross insurance premiums,

comprising of 11 421 000 000 in direct insurance and $242 000 000 in reinsurance. The APRA (2013) advised in the same report that travel insurance amount to collections of $230 000 000.

2.2.4 Tourism stakeholders: Summary

As has been established in this background literature section, there is an underlying operational nexus between civil aviation and tourism, and that tourism is not one rigid industry but, as writers such Leiper (2008) argue, a conglomeration of multiple industries which interact to form the *tourism industries*. The background literature has identified and discussed some of the stakeholders in the Australian tourism industries.

Having discussed aviation's relationship with tourism and aviation companies'prevalence and nature in Australia, I will now proceed to discuss a major component of this thesis: age demographics.

2.2.5 Australian demographics in general

The ABS (2013) reports that Australia's population increased by 1.8% in the year ending March 2013, at which the national population stood at 23 032 700 persons, an increase of 397 400 persons in comparison to the same period the year previous. Of this increase, natural increases were reported at 159 100 persons (40.03%) and net overseas migration accounted for 238 300 persons (59.07%). The natural increases year ending March 2013, as reported by the ABS (2013) were a 0.8% rise (1 200 persons) since the ending 31 March 2012 and the net overseas migration increase was a 10.5% (22 600) during the same period. The ABS (2013) demographic statistics reported that as at 20 June 2013, the number of baby boomers in Australia (born 1946-1964) stood at 4 323 824 persons.

The median age of Australia's population (37.3 years as at 30 June 2012 – ABS 2013) is projected to increase to between 38.7 years and 40.7 years in 2026 and to between 41.9 years and 45.2 years in 2056. The number of persons aged 65 years and above in Australia increased by 96 700 persons during the 12 months prior to 30 June 2010. This is a 2.4% increase over the previous financial year (ABS 2008). Persons aged 65 years and above represent 14.0% of the Australian population (ABS 2013) and are projected to increase to 15.3% of the Australian population by 2015 (ABS 2008). The proportion of people aged under 15 years is projected to decrease from 19% in 2007 to between 15% and 18% in 2056 and to between 14% and 17% in 2101. People aged 85 years and over comprised 1.6% of the population (344 100 people) as at 30 June 2007, and this percentage is expected to grow to between 4.9% and 7.3% by 2056 (ABS 2008). Moreover, Australia's life expectancy rates are amongst the highest in the world according to the Organisation for Economic Cooperation and Development (OECD) *Life Expectancy (2013)*. See Table 2.6 over page.

Table 2.6: Life expectancy rates

	Women				Men				Total			
	1970 or first available year	1990	2000	2010 or latest available year	1970 or first available year	1990	2000	2010 or latest available year	1970 or first available year	1990	2000	2010 or latest available year
Australia	74.2	80.1	82.0	84.0	67.4	73.9	76.6	79.5	70.8	77.0	79.3	81.8
Austria	73.5	79.0	81.2	83.5	66.5	72.3	75.2	77.9	70.0	75.6	78.2	80.7
Belgium	74.3	79.5	81.0	83.0	67.8	72.7	74.6	77.6	71.0	76.1	77.8	80.3
Canada	76.4	80.8	81.7	..	69.3	74.4	76.2	..	72.8	77.6	79.0	..
Chile	..	76.5	80.0	82.0	..	69.4	73.7	75.9	..	72.9	76.8	79.0
Czech Republic	73.1	75.5	78.5	80.9	66.1	67.6	71.7	74.5	69.6	71.5	75.1	77.7
Denmark	75.9	77.8	79.2	81.4	70.7	72.0	74.5	77.2	73.3	74.9	76.8	79.3
Estonia	74.0	74.7	76.0	80.5	65.4	64.5	66.1	70.6	69.7	69.6	70.6	75.6
Finland	75.0	79.0	81.2	83.5	66.5	71.0	74.2	76.9	70.8	75.0	77.7	80.2
France	75.9	80.9	82.8	84.7	68.4	72.8	75.2	78.0	72.2	76.8	79.0	81.3
Germany	73.6	78.5	81.2	83.0	67.5	72.0	75.1	78.0	70.5	75.3	78.2	80.5
Greece	76.0	79.5	80.6	82.8	71.6	74.7	75.5	78.4	73.8	77.1	78.0	80.6
Hungary	72.1	73.7	75.9	78.1	66.3	65.1	67.4	70.5	69.2	69.4	71.7	74.3
Iceland	77.2	80.5	81.8	83.5	71.2	75.4	78.4	79.5	74.3	78.0	80.1	81.5
Ireland	73.5	77.7	79.2	83.2	68.8	72.1	74.0	78.7	71.2	74.9	76.6	81.0
Israel	73.4	78.4	80.9	83.6	70.1	74.9	76.7	79.7	71.8	76.7	78.8	81.7
Italy	74.9	80.3	82.8	..	69.0	73.8	76.9	..	72.0	77.1	79.8	..
Japan	74.7	81.9	84.6	86.4	69.3	75.9	77.7	79.6	72.0	78.9	81.2	83.0
Korea	65.6	75.5	79.6	84.1	58.7	67.3	72.3	77.2	62.1	71.4	76.0	80.7
Luxembourg	73.0	78.7	81.3	83.5	66.2	72.4	74.6	77.9	69.7	75.5	78.0	80.7
Mexico	63.2	73.5	76.5	77.8	58.5	67.7	71.2	73.1	60.9	70.6	73.9	75.5
Netherlands	76.5	80.1	80.5	82.7	70.8	73.8	75.5	78.8	73.7	77.0	78.0	80.8
New Zealand	74.5	78.4	80.8	82.8	68.4	72.5	75.9	79.1	71.5	75.5	78.3	81.0
Norway	77.5	79.9	81.5	83.3	71.2	73.5	76.0	79.0	74.3	76.7	78.8	81.2
Poland	73.2	75.2	78.0	80.6	66.6	66.2	69.7	72.1	70.0	70.7	73.8	76.3
Portugal	69.7	77.5	80.2	82.8	63.6	70.6	73.2	76.7	66.7	74.1	76.7	79.8
Slovak Republic	72.9	75.4	77.4	78.8	66.7	66.6	69.1	71.6	69.8	71.0	73.3	75.2
Slovenia	..	77.2	79.1	82.7	..	69.4	71.9	76.3	..	73.2	75.5	79.5
Spain	74.8	80.6	82.9	85.3	69.2	73.4	75.8	79.1	72.0	77.0	79.4	82.2
Sweden	77.1	80.4	82.0	83.5	72.2	74.8	77.4	79.5	74.7	77.6	79.7	81.5
Switzerland	76.2	80.9	82.8	84.9	70.0	74.0	77.0	80.3	73.1	77.5	79.9	82.6
Turkey	56.3	69.5	73.1	76.8	52.0	65.4	69.0	71.8	54.1	67.5	71.0	74.3
United Kingdom	75.0	78.5	80.3	82.6	68.7	72.9	75.5	78.6	71.8	75.7	77.9	80.6
United States	74.7	78.8	79.3	81.1	67.1	71.8	74.1	76.2	70.9	75.3	76.7	78.7
EU 27	74.0	77.7	79.6	81.8	67.9	70.5	73.0	75.5	71.0	74.1	76.3	78.7
OECD	73.4	78.1	80.2	82.4	67.2	71.4	74.0	76.9	70.3	74.7	77.1	79.7
Brazil	60.7	70.2	74.1	76.7	56.5	62.7	66.4	69.7	58.6	66.5	70.3	73.2
China	63.6	71.1	72.9	75.0	62.2	67.9	69.6	71.6	62.9	69.5	71.3	73.3
India	48.5	58.7	62.6	66.7	49.8	58.1	60.6	63.6	49.1	58.4	61.6	65.2
Indonesia	53.5	63.8	67.3	70.6	50.3	60.5	64.1	67.3	51.9	62.1	65.7	69.0
Russian Federation	73.5	74.3	72.3	74.9	63.0	62.8	59.1	63.0	68.3	69.0	65.7	69.0
South Africa	56.6	65.3	57.3	52.8	50.3	57.9	52.3	51.4	53.0	61.6	54.8	52.1

Source: OECD (2013)

2.2.5.1 Australian traveller demographics

Whilst it does not present solid demographic statistics, BITRE (2008) notes that increasing financial viability, along with cheaper travel and the longer range capability of aircraft means that air travel is becoming more in demand. Coupled with the increasing propensity of baby boomer Australians to travel (TRA 2008), this could mean that quite competitive economies of scale are becoming ever more available for airlines to take advantage of. Additionally, Cleaver, Green and Muller (2000) stipulate the importance of tourism organisations in recognising '*the opportunities and challenges presented by this aging generation*' (p. 274) and Cleaver et al. (1999) estimate that the baby boomer traveller cohort represents approximately 30% of the entire travel market in CANZUS (Canada, Australia, New Zealand and the United States) nations.

Baby boomers have more discretionary income available to them and the cost of travel is less a concern than it is for other travellers (Cetron & Rocha 1987; Glover & Prideaux 2008; Muller & Cleaver 2000; Patterson & Pan 2007; Sambath 2008; Schindler 2005; Szmigin & Carrigan 2001; Xinran, O'Leary & Gyehee 2001). Glover and Prideaux (2008, p.30), Patterson (1992) and Malley (1998) further identify that baby boomers are likely to make travel decisions much more quickly than others, due to their personal requirements for self-gratification and Muller and O'Cass (2001) distinguish between actual and subjective ages in which baby boomer travellers feel much younger than their chronological ages (Sperazza 2011; Szmigin & Carrigan 2001), leading to more desire for activity during travel including adventure tourism (Batra 2009; Patterson & Pan 2007).

As population demographics change, so too may the age demographics of tourism (and ultimately, aviation) consumers. Airline managements may need to consider such issues in planning in order to maintain (or even increase) market share, as '*in thirty years' time … baby boomers will be the major older travel segment, and members of generation X will have commenced retiring in significant numbers*' (Glover & Prideaux 2008, p.30). Patterson and Pan

(2007) further argue that travelling provides an alternative to the boredom of retirement. Moreover, baby boomers (together with the older generation X) are the age cohorts that spend the most on tourism products (TRA 2008).

2.2.5.2 Baby boomer travellers

According to Roy Morgan Research (2005), the baby boomer traveller cohort accounted for up to 40% (664 000) of total Australian travellers in the Asia-Pacific region (January–December 2005), spending $AUD4.1 billion. This figure is considerably higher than the one-third estimate by Cleaver et al. (2000). Although many of the baby boomer travellers in the Roy Morgan report were found to be budget-conscious, 21% spent $AUD200-$299 per person per day and 22% spent $AUD300. The same report reported that a further 1 718 000 Australian baby boomers would have liked to holiday in the region. In contrast, Tourism Research Australia presents more conservative estimates as per table 2.7.

Table 2.7: Travel behavior patterns by age average 1999-00 to 2006-07

Age	Mean household income	Trips per capita	Trip duration (nights)	Nights per capita	Expenditure per trip ($)	Expenditure per night ($)	Expenditure per capita ($)
15-19 years	64 841	4.3	3.7	16	228	62	953
20-29 years	66 252	5.1	3.4	17	484	143	2 324
30-49 years	66 779	4.9	3.5	17	741	211	3 114
50-59 years	63 066	5.1	3.9	20	673	172	3 008
60+ years	31 145	3.5	5.8	20	507	87	1 733

Source: TRA (2008)

The TRA (2008) reported that travellers within the range of 50-59 years of age spent $AUD673.00 per trip leading to 2006-07 and those of the 60+ age group spent $507.00 per trip, on domestic tourism, per capita. That same TRA (2008) report explicated that baby boomers are projected to take average trip durations of 4.7 to 5.1 per capita nights by 2020, however numbers of trips are expected to decline from 28% to 22% share of domestic trips. Furthermore, the report estimated that baby boomers will bear a 32% share of visitor nights in various types of accommodations, however actual expenditure is projected to fall from 31% (2006) to 17% (2020), due to the growing propensity of baby boomers to holiday in cheaper modes of tourism such as caravanning, camping and VFR.

With regard to travel modes, the TRA (2008) projects that 30% baby boomers will utilise air travel as the mode of domestic travel within Australia leading to 2020. With regard to outbound travel (departure from Australia) figures are expected to reach up to 9.4 million trips by 2020, a rise of 4.5 million trips or 91% from 2006 (TRA 2008). Baby boomers are expected to account for up to 1.8 million trips (a rise of 3.6% annually from 2006) by 2014, after which it is anticipated that the number of outbound trips would decline to 1.6 million by 2020, as baby boomers travel less frequently but for longer stays. Baby boomers, although responsible for a large share of holiday spending, remain cautious regarding the usage of information technology (IT) for booking travel arrangements, however they are increasingly becoming more familiar with IT (Patterson 2008).

Additionally, research has shown that many baby boomer people, whilst demanding products, such as health and wellness tourism (Ravichandran & Suresh 2010), quality service (Cassidy 2008) and adventure travel (Muller & Cleaver 2000), consider themselves younger than what they really are (e.g. Sperazza 2011; Szmigin & Carrigan 2001) and Muller and O'Cass (2001) discuss the differences between *subjective* and *actual* age. They argue that the determinants of attitudes, interests and preferred activities can be ascertained from examining these

differences. Reisenwitz and Iyer (2007) further stress the importance of organisations refraining from the segmentation of the baby boomer cohort, into *older* and *younger* baby boomers. In contrast Beldona (2005, quoted in Beldona, Nusair & Demicco 2009, p. 417) argues that older baby boomers are more likely to seek travel information than younger baby boomers. Beldona's work was based on research in 2000, in which references were made to two baby boomer cohorts of 43–47 and 53–58 years of age. Further discussion regarding the preferences for destinations and associated activities is provided in Section 2.3.5.

2.2.6 Background literature: Data propositions

This subsection serves to discuss the expected data outcomes of this research. The diversity of expected responses is concomitant with the fragmentation of the tourism industries and other factors (e.g. Leiper 2008). Given tourism's importance to the Australian economy (TRA 2010) and tourism's reliance on civil aviation for transporting tourists to, from and within the nation (BITRE 2008), it is expected that the tourism industries' stakeholder participants in this research will present strong views in regard to the research theme in general. However, it is also anticipated that due to the diversity of the tourism industries (i.e. their multifarious components) the views which contribute to the themes which emerge will be quite diverse, and views from participants in different categories may even conflict.

With the increasing deregulation of civil aviation statutes (and their associated regulations) (BITRE 2008; Compart 2008; Creedy 2008), LCCs and practice of cabotage (BITRE 2008), the responses from participants will be mixed and may vary in accordance with their associations and experiences with the various airlines including the LCCs. This would especially be the case in regard to the LCCs and their cost-cutting measures which they apply in order to compete in the increasingly dynamic civil aviation markets.

The ability of airline staff to cope with increasing numbers of baby boomers is expected to draw much comment in the research, especially with regards to communication skills and general understanding of baby boomers and their unique requirements in areas such as customer service (BITRE 2008). The ability of baby boomer travellers and airline staff to communicate with each other and the ability of staff to understand the unique requirements of the former may be brought to question. In particular, the services of LCCs are expected to be raised amongst the participants of this research, especially with regard to in-flight service, comfort and airport/ground handling.

Due to their relatively close contact with the airlines (e.g. Assaf 2010; Abbott & Wu 2002), it is expected that airport management participants in this research will respond with some depth in regard to airlines' ground operations at airports. Thus it is anticipated that this will entail responses in regard to ground handling, aircraft access, airports infrastructure and customer service.

Contrasting views amongst various writers and researchers in regards to baby boomer travellers' requirements and capabilities, are prevalent in the literature. Such discussions include the IT literacy of baby boomers when seeking travel information (e.g. Patterson 2008). It is expected that there will be contrasting data emerging in the results with regards to the unique requirements of baby boomer travellers, specifically pertaining to themes such as customer service, destination requirements, aviation medicine, security measures and communication to name few.

Because cruise lines play an important role in the provision of services to baby boomer travellers (Access Economics 2008; ICCA 2010), their views regarding airlines' handling of baby boomer air travellers is expected to yield themes associated with cohesion between various industries of the tourism sector, namely airlines and cruise lines. These themes are likely to

involve the effect of increased efficiency in transporting travellers on flights to and from airports closest to cruise liners' ports-of-call.

Due to the representative nature of associations and councils (such as Tourism Australia), it is anticipated that responses from the managers of such organisations will be biased towards the geographical area and/or service category which they represent. However, such biases would serve as practical examples when accentuating concerns for the benefit of baby boomer air travellers.

Having established the importance which tourism academics attach to the tourism industries (Ayikoru et al. 2009; Breakey & Craig-Smith 2008; Goodman & Sprague 1991, quoted in Wang et al. 2010; Sheldon et al. 2011), it is expected that the data emerging from the tourism academics in this research may relate to research already conducted into areas associated with the research theme of this thesis. Such data may be expected to contrast with the data of the other participants and could be rather richer in terms of themes which develop.

Because the role of government tourism bureaus is to promote their respective destinations regardless of potential travel markets (Tourism Australia), the responses elicited from such participants are expected to be generally related to travel markets as a whole, with some occasional reference to baby boomers.

Travel agents and tour operators deal directly with baby boomer travellers (Batra 2009; Hung & Petrick 2009) and thus the data extracted from these stakeholders is expected to reveal complaints (directly or otherwise) made by the travellers to their agents. Given the potential diversity of income levels amongst baby boomer travellers, there could also be diverse responses in regard to the financial capacities of the travellers to pay for higher levels of quality and service, such as premium economy class on fully-fledged airlines.

Travel insurance aims to cover a traveller from numerous complications which could potentially occur during a traveller's trip (APRA 2013). Accordingly, it is anticipated that travel insurance participants may refer to matters which are directly or indirectly connected to insurance coverage, such as medical episodes (e.g. deep vein thrombosis, or DVT).

2.2.7 Background literature summary

The Australian population, despite current immigration trends, is ageing and according to ABS projections (unless other future factors emerge, perhaps such as another baby boom) the baby boomer generation (and perhaps indeed all older generations commencing with the younger baby boomers) will become a major cohort of the population using airlines for travel, with a particular emphasis on tourism.

Having discussed civil aviation's relationship with tourism in Australia, having identified the growing baby boomer cohort in Australia in relation to air travel, and having stated the expected results of the research, I will now proceed to discuss academic fields which will be pertinent to aviation if current demographic trends continue. These fields are change management and the associated sub-fields of strategic management and dynamic capabilities. Additionally, I will discuss the field of stakeholder theory. Airlines may be influenced by market forces into implementing nimble change management techniques as well as effective marketing, in order to remain sustainable in the coming years as more baby boomers travel by air. Such requirements would be required so the airlines meet the requirements of important stakeholders, the travellers.

2.3 Parent literature

The background literature section of this chapter discussed government- and industry-related articles on the Australian civil aviation industry as well as tourism's reliance on aviation and the major stakeholders in civil aviation in Australia. Additionally, some academic articles were citied which support of industry and government concerns.

In this section, I discuss the academic fields which could be utilised as lenses for the interpretation of the rich data expected to be gained from this research. This is followed by a brief discussion of the fields finally chosen (with an emphasis on dynamic capabilities) and their association with the civil aviation industry and how this could relate to the research findings of this thesis. There will also be discussion in regard to stakeholder theory.

Section 2.3.5 discusses the anticipated research outcomes in relation to the parent literature.

2.3.1 Change management

As will be further discussed in this subsection, civil aviation is a dynamic industry in which airline managers require considerable skills and agility to lead their organisations through change if their companies are to remain commercially sustainable. As shown in Section 2.2 aviation is a changing industry and it is anticipated that this will be shown by the responses from various participants in the interviews (as explicated in Chapter 4). Accordingly the field of change management was considered as a possible academic lens with which to interpret the data from this thesis, but was subsequently deemed unproductive. A field capable of providing more protracted depth was required.

2.3.2 Strategic management

Consideration was then given to strategic management as the themes from the data were expected to reveal that airlines would require strong management involvement to implement innovative leadership and lead the airlines to future competitive advantage and thus profitability, amid the turbulence in the civil aviation industry which is subject to change as identified in the literature (to be discussed later in this Section 2.3). Again, this field (strategic management) was considered too broad (though somewhat relevant) to apply to the richness of the anticipated data. It was considered that greater depth would be required. However, because of its relevance, I will discuss the importance of strategic management in organisations, including airlines, before arriving at the main subfield of change management – dynamic capabilities, which will be applied to interpret the findings of the research interviews, followed by stakeholder theory.

Amason defines strategic management as '*a framework for analysing the environment, for integrating the firm's activities, for learning and adapting to change, and for creating value both in the present and into the future*' (2010, p. 7). A key goal of strategic management is to understand the influences impacting organisational performance (Bergh, Ketchen, Boyd & Bergh 2010; Cravens, Piercy & Baldauf 2009; Grandy & Wicks 2008) and so strategic management involves the continuous '*scanning and adapting to the environment*' (Stead & Stead 2008, p. 66). The more rapidly a market is changing, the more strategic thinking is required by an organisation's management (Cravens et al. 2009). Moreover, strategic management is not one solid field of academic research but a conglomeration of fields (Ketchen, Boyd & Bergh 2008; Nag, Hambrick & Chen 2007) including the field of dynamic capabilities which will be discussed in Section 2.3.3 and will be used a lens to interpret the findings presented in Chapter 4 in the final conclusion in Chapter 5.

2.3.2.1 Importance of strategic management to organisations

Bergh et al. (2010) and Mellahi and Sminia (2009) argue that strategic management is a continually evolving field and Nonaka and Toyama (2007) further depict strategic management as perpetually evolving (as a field of academia) because strategic management scholars keep searching for the '*elusive right answer*' (p. 371). Additionally, the field of strategic management is considered relatively nascent by other writers (e.g. Ketchen et al. 2008; Mellahi & Sminia 2009; Nag et al. 2007; Nerur, Rasheed & Natarajan 2008). Nonaka and Toyama (2007) argue that strategic management theories may serve to assist organisations in creating value, but that such theories are inept at specifying '*exactly how a firm finds a way to create value by finding an unfulfilled customer need or a new way of fulfilling an existing need*' (p. 371) because it is the consumers who pay for the products and it is they who can perceive their value. However, Ghoshal (2005) cautions that bad strategic management is based on business schools' teachings and Li and Peng (2008) assert that it is important for organisations to consider the cultural aspects of management when choosing appropriate strategies and Nonaka and Toyama (2007) claim that strategic planning has been emphasised at the expense of business practice.

According to Stead and Stead (2008), the advent of the concept of strategic management as a field within management was due to increasing economic turbulence. Additionally, Wissema, Brand and Van Der Pol (1981) argue that changes in an organisation's environment necessitate changes to its capabilities and Goll, Johnson and Rasheed (2008), in studying airlines, postulate a relationship between organisational management, organisational performance and strategies taken to achieve success. Some of the reasons why organisations require good strategic management include:

- To develop an ability to navigate through financial crises such as the recent global financial crisis (Agarwal, Barney, Foss & Klein 2009; Park & AlSawy 2012);

- To achieve environmentally sustainable enterprises and competitive advantage (Kraus & Kauranen 2009; O'Regan & Ghobadian 2004; Stead & Stead 2008);
- To adapt to change (Craven et al. 2009; Kraus & Kauranen 2009; O'Regan & Ghobadian 2004) so that organisations may be aligned with the dynamic equilibrium of the markets (Wissema et al. 1981);
- To establish future organisational planning (Craven et al. 2009; Henkel 2009; Mitchell, Shepherd & Sharfman 2011; Stead & Stead 2008);
- To deal with increased globalisation and deregulation which are leading to expanded competition (Bridoux, Smith & Grimm 2011; Goll et al. 2009; Mellahi & Sminia 2009; Simon, Kumar, Schoeman, Moffat & Power 2011; Sjögren & Söderberg 2011).

2.3.2.2 Requirements for successful strategic management

Cravens et al. (2009) stipulate that for an organisation's management to achieve successful strategic management, strategic thinking is essential, especially as '*Markets are impacted by new customer value requirements, new technologies, new competitors, and new business designs*' and accordingly '*Change has become the norm in contemporary markets and competitive space*' (p. 34). Additionally, in stressing the importance of middle management in organisations, Mantere (2008) concludes that '*Organisations do not create, implement or renew strategies, people do*' (p. 312). The following is not an exhaustive list, but it identifies some additional requirements for successful strategic management:

- Aligning organisational strategic goals with the business environment (O'Regan & Ghobadian 2004; Park & AlSawy 2012) especially as industries change (Park & El Sawy 2012; Porter 1996);

- Establishing an organisational culture spanning all staff, which is market-oriented and customer centred (Cravens et al. 2009) and in which service quality is important (Simon et al. 2011);
- Market sensing and learning in order to guide strategic thinking (Cravens et al. 2009);
- Creative and innovative products (Simon et al. 2011) which are key contributors to markets which undergo rapid change (Cravens et al. 2009);
- Competent management (Amason 2010; Mantere 2008; Wissema et al. 1981) with good leadership (Simon et al. 2011);
- Making trade-offs (Porter 1996).

2.3.2.3 Strategic management in the airlines

Bieger and Wittmer (2011) argue that because the civil aviation industry is not fully deregulated, there are limitations imposed on airline managers (such as bilateral air services agreements between various governments) in the strategic management options available to them. Supplementing this, Cravens et al. (2009) discuss the concept of disruptive innovation in which LCCs may disrupt the operations of incumbent airlines even to the extent of driving the latter to bankruptcy and further warn that simply mimicking LCCs products (on the part of major airlines) is not enough to survive turbulent markets and so they stress the need for major airlines to meet demanding customer requirements. Supporting the views of Cravens et al. (2009), Porter (1996) discusses the practical example of Continental Airlines attempting to compete with Southwest Airlines by establishing a low cost model named Continental Lite on which meals were not served on various flights. However given that Continental Airlines still operated fully-fledged services on other routes which were sold by travel agents, the venture did not last. More proactiveness is required, especially to compete with LCCs. Thus Porter (1996) argues that airlines need to make trade-offs. Strategy selection and not just management per se is important for organisational survival (de Bruijn & Steenhuis 2004).

Managers must understand how to actively manoeuvre firms around competition (Bridoux et al. 2011). This is especially so in deregulated environments such as civil aviation where, as Goll et al. (2009) conclude, a significant relationship exists between top airline management and business strategy where the airline managers are given a greater degree of discretion in choosing and implementing the strategies which influence an airline's performance.

Karaevli (2007) suggests that a new airline manager's *outsiderness* (in which an airline appoints a CEO-chief executive officer from a non-airline background) may serve to improve an airline's performance, citing Delta Airlines as an example in which a non-airline CEO was appointed in comparison to United Airlines who at the same time appointed a 32-year veteran of the airline. Delta Airlines outperformed United Airlines. Without directly mentioning airlines, Porter (1980, discussed in Goll et al. 2008, p. 205) identifies three types of competitive strategies which could potentially be applied by organisations:

- Lowering costs;
- Product differentiation;
- Focus.

As discussed in the background literature (Section 2.2.3.1) the advent of LCCs has affected the Australian civil aviation industry. LCCs have been gradually increasing their market share, now estimated at 10.9% for the 2 LCCs in the top 10 airlines. This presents a scenario in which the fully fledged airlines must be better prepared to compete in the turbulence. Goll et al. (2008) disaggregate Porters' competitive strategies and apply them to airlines as:

- Quality leadership strategy;
- Cost leadership strategy;
- Niche carrier strategy.

Some of the many reasons for airlines to build and maintain effective strategic management are:

- The need to apply and implement technology strategies (de Bruijn & Steenhuis 2004);
- Choice of airliners appropriate to operational requirements (de Bruijn & Steenhuis 2004);
- Increasing competition including that challenged by LCCs (Lawton 2003; Merkert & Hensher 2011; Porter 1996) which may be as a result of government deregulation (Bieger & Wittmer 2011; BITRE 2008; Goll et al. 2008; Sjögren & Söderberg 2011);
- Increasing prevalence of strategic airline alliances (including code-sharing agreements) which impacts airlines' operational performance (Bieger & Wittmer 2011; Lazzarini 2007);
- Security uncertainties such as September 11, 2001 (Drennen 2011; Karaevli 2007; Lawton 2003).

Furthermore, Lawton (2003) postulates that increased deregulation in the civil aviation market, which has led to increasing competition, means that airlines are faced with narrowing margins for operational error, especially given that operational profits are minimal for most airlines. Lawton also conjectures that LCCs have proven better able to recover from events such as September 11, 2001, because of successful strategic management decisions. Lawton suggests that some of the strategic practices which the managements of incumbent carriers may implement (as part of strategic management drives), may include:

- Advertising campaigns immediately after downturn times;
- Outsourcing of various operations, such as catering;
- Wage concessions during downturns.

Further measures may include conserving cash during boom times for investment during troughs (Zea 2002, quoted in Lawton 2003, p. 175) and the removal of services such as meals (Porter 1996).

Having presented a brief general discussion in regard to strategic management as an academic field associated with change management and applying strategic management to the civil aviation industry, I will now further narrow to a more specific field which will serve to provide substance for the findings of this thesis. This is the paradigm of dynamic capabilities, a sub-field of strategic management. First I will present a brief overview of the subfield of dynamic capabilities and its application to organisations in general, followed by its application to the civil aviation industry by writers and researchers in the field of strategic management.

2.3.3 Dynamic capabilities

Because dynamic capabilities is an area of strategic management dealing with the abilities of organisations to change practices according to market changes and pressures (as well as changes in political and bureaucratic requirements amongst other demands) and because the civil aviation industry is an industry prone to such change and dynamics, it was determined that this sub-discipline or paradigm (dynamic capabilities) would be applied to interpreting the data expected to be uncovered in this thesis. Furthermore, the literature established that the application of dynamic capabilities as a sub-field within strategic management has proven successful (Mellahi & Sminia 2009).

Dynamic capababilities as an academic field of strategic management has been prevalent in the literature since 1994, in which Teece and Pisano (1994) defined it as '*The subset of the competences and capabilities that allow the firm to create new products and processes and respond to changing market circumstances*'. Subsequent papers by Teece included Teece et al.

(1997), and Teece (2002; 2007). Other writers included Eisenhardt and Martin (2000), Zollo and Winter (2002), Zahra, Sapienza and Davidsson (2006), Helfat and Peteraf (2009) and Ambrosini and Bowman (2009).

Dynamic capabilities was a challenging academic field to apply to the findings of this research as a lens with which to interpret the expected rich in-depth data, especially because civil aviation has been undergoing major changes in recent years. Furthermore, the application of dynamic capabilities was relevant in regard to deregulation which leads to growing competition which increases the pressure on airline managers to guide their airlines through such competition to achieve competitive advantage and profitability.

I will now discuss dynamic capabilities as a paradigm within the field of change (and strategic) management. I examine its congruence with change management and its application amongst current researchers and writers to civil aviation.

2.3.3.1 Dynamic capabilities: An introduction

Whilst various academic fields serve to address issues associated with change management (such as innovation and organisational learning) the field of dynamic capability '*specifically focuses on how firms can change their valuable resources of time persistently*' (Ambrosini & Bowman 2009, p.30). Sher and Lee (2004) state that strategic management '*requires a major stream of business administration dealing with the question of managing an organisation in a dynamic and discontinuous environment*' (p. 933).

Much of the sub-theme of dynamic capabilities within the field of strategic management is owed to the seminal works of David J. Teece. In one of his papers, Teece et al. (1997), argues that an expanded paradigm was required in order to better understand competitive advantage

due to the growing emergence of global competition and that current paradigms were not adequate for this task. Thus dynamic capabilities theory could potentially be applied to civil aviation as an increasingly competitive industry, since airlines are challenged increasingly with major changes such as deregulation, changes in the demographics of travellers and increased competition. The impacts of these changes are further discussed in the parent literature section of this chapter.

In contrast, Zollo and Winter (2002) argue that organisations implement changes in their competencies, even in environments which have lower rates of change. Should such an argument be accepted, it could be concluded that dynamic capabilities as a paradigm could be applied to larger airlines which are prone to major changes as well as smaller airlines with as few as one aircraft which are not so prone to the challenges faced by their larger counterparts. Thus, the study and application of dynamic capabilities may not necessarily be dependent on the size of an organisation. Moreover, citing the newness (at the time of their research) of dynamic capabilities as a field within strategic management, Ambrosini and Bowman (2009) postulate that many questions need to be answered before dynamic capabilities can have a major impact on management practice and Helfat and Peteraf (2009) stipulate that dynamic capabilities is a complex field of academe. A further reason as to why there are multiple interpretations of the meaning of dynamic capabilities is that there are many different types of dynamic capabilities with each type performing different tasks (Helfat & Peteraf 2009).

As will also be discussed in this parent literature section, the explanations and interpretations of the term dynamic capabilities are quite broad and in its current nascence it is yet to prove itself worthy of being a theory (Helfat & Peteraf 2009). In this sub-section I present a brief discussion of some of the postulations of writers and researchers, before attempting to establish a nexus between dynamic capabilities and change in civil aviation.

Within the academic field of strategic management, the term 'dynamic capability' refers to the ability of an organisation to achieve and sustain competitive advantage (Ambrosini & Bowman 2009; Melville, Gurbaxani & Kraemer 2007; Sher & Lee 2004; Teece et al. 1997; Wissema et al. 1981) through adaptation to change (Helfat & Peteraf 2003) and constitutes a major management concern (Gebauer 2011). Thus, Teece et al. (1997) conclude that '*dynamic capabilities can be seen as an emerging and potentially integrative approach to understanding the newer sources of competitive advantage*' (p. 510) and additionally the ability to achieve new forms of competitive advantage is labelled (by Teece et al. 1997) as dynamic capability. Wissema et al. (1981) stress that changes in an organisation's environment necessitate changes to the organisation's capabilities.

Dynamic capabilities are an organisation's abilities to '*integrate, build and reconfigure internal and external competences to address rapidly changing environments*' (Teece et al. 1997, p. 516). Additionally, Teece and Pisano (1994) maintain that dynamic capability is a source of competitive advantage and Teece et al. (1997) present dynamic capabilities as an extension of the resource-based view (Rothaermel & Hess 2007; Tollén & Frålund 2010), a business management tool applied by organisations to determine the strategic resources at their disposal (Helfat & Peteraf 2009). Zollo and Winter (2002) define dynamic capabilities as '*routinised activities directed to the development and adaptation of operating routines*' (p. 339). Teece (2007, p. 1319) disaggregates dynamic capabilities as a firm's ability to do the following:

(i) '*Sense and shape opportunities and threats*', in which scanning markets and technologies (such as research) is required for an organisation to learn and interpret fluxes in the markets;

(ii) '*Seize opportunities*', in which organisations endeavour to develop new processes, products or services;

(iii) '*Maintain competitiveness though enhancing, combining, protecting, and when necessary, reconfiguring the business enterprise's intangible and tangible assets*'.

Table 2.8 (below) presents some of the main definitions of dynamic capabilities as presented by Barreto (2010).

Table 2.8: Main definitions of dynamic capabilities

Main definitions of dynamic capabilities	
Study	**Definition**
Teece & Pisano (1994)	The subset of the competences and capabilities that allow the firm to create new products and processes and respond to changing market circumstances
Teece, Pisano & Shuen (1997)	The firm's ability to integrate, build and reconfigure internal and external competencies to address rapidly changing environments
Eisenhardt & Martin (2000)	The firm's processes that use resources-specifically the processes to integrate, reconfigure, gain and release resources-to match and even create market change; dynamic capabilities thus are the organisational and strategic routines by which firms achieve new resource configurations as markets emerge, collide, split, evolve and die
Teece (2000)	The ability to sense and then seize opportunities quickly and proficiently
Zollo & Winter (2002)	A dynamic capability is a learned and stable pattern of collective activity through which the organisation systematically generates and modifies its operating routines in pursuit of improved effectiveness
Winter (2003)	Those (capabilities) that operate to extend, modify, or create ordinary capabilities
Zahra, Sapienza & Davidson (2006)	The abilities to reconfigure a firm's resources and routines in the manner envisioned and deemed appropriate by its principal decision maker(s)
Helfat et al. (2009)	The capacity of an organisation to purposefully create, extend or modify its resource base
Teece (2007)	Dynamic capabilities can be disaggregated into the capacity (a) to sense and shape opportunities and threats, (b) to seize opportunities, and (c) to maintain competitiveness through enhancing, combining, protecting, and when necessary, reconfiguring the business enterprise's intangible and tangible assets

Source: Borreto (2010)

As discussed in Table 2.7 above, there are multiple interpretations and definitions of dynamic capabilities (Ambrosini & Bowman 2009; Barreto 2010; Wang & Ahmed 2007). For the purposes of this thesis and the findings associated with it I will apply the broad interpretation rendered in the seminal work of Teece et al. (1997): '*the firm's ability to integrate, build, and reconfigure internal and external competences to address rapidly changing environments*' (p. 516). The

reason for applying an earlier seminal definition is to accommodate varying dynamic capabilities in the airlines involved in this thesis.

2.3.3.2 Dynamic capabilities' nomenclature

The word *dynamic*, according to Teece et al. (1997), refers to an organisation's capacity to achieve the renewal of competences in order to attain congruence with the altering business environment. This is because innovative responses are required when time is critical and the competitive nature of the market is difficult to assess. Winter (2003) discusses the congruence of the word *dynamic* with change. In contrast, Sher and Lee (2004) postulate that *dynamic* refers to '*the concurrency of organisational renewal with environmental change*' (p. 934).

Teece at al. (1997) argue that *capabilities* refers to the ability of an organisation's senior management in '*appropriately adapting, integrating and reconfiguring internal and external organisational skills, resources and functional competences to match the requirements of a changing environment*' (p. 515), and additionally in identifying that most sources of competitive advantage are clustered in proximity to a limited few structured frameworks (paradigms), attempted to establish an emergent new paradigm which they labelled *dynamic capabilities*. The predominant frameworks discussed by Teece et al. (1997, p. 511) were Porter's five forces (1980) and the Shapiro (1989) article '*The theory of business strategy*'.

2.3.3.3 Importance of organisations being dynamically capable

The development of dynamic capabilities has attracted much attention from writers and researchers (Barreto 2010; Easterby-Smith, Lyles & Peteraf 2009). Essentially, the paradigm of dynamic capabilities is concerned with '*dynamics and the mechanisms for bringing about organisational change*' (Easterby-Smith et al. 2009, p. 2). In contrast, Winter (2003) asserts that

dynamic capabilities are not necessarily a requirement for achieving successful change, and instead advocating ad hoc problem-solving in which '*product modification can run into unexpected snags that are beyond the scope of the dynamic capability, and require a complementary dose of ad hoc problem solving*' (p.4). Barreto (2010) cautions that the successful implementation of dynamic capabilities does not necessarily result in improved competitive advantage or profitability for an organisation. Furthermore, organisations don't compete to develop new products, but as Prahalad and Hamel (1990, quoted in Lawson & Samson 2010, p. 379) discuss, '*the capacity to develop new products*'.

Change is an ongoing process for many organisations and some of the many reasons organisations need to be dynamically capable in order to keep up with the pace of changes include:

- Organisations build enduring advantages solely through efficient and effective operations (Katkalo, Pitelis & Teece 2010; Teece et al. 1997; Teece 2007; Zollo & Winter 2002);
- Organisations must be able to establish a truly distinctive competence (Andrews 1987, quoted in Teece et al. 1997, p. 513) using rare resources and capabilities (Barreto 2010; Simon et al. 2011);
- Increasing turbulence of the competitive business environment (Ambrosini & Bowman 2009; Grant 1996; Prahalad & Hamel 1994; Teece & Pisano 1994; Teece 2007; Winter 2003; Zahra et al. 2006; Zollo & Winter 2002) in which innovation is required to achieve competitive advantage (Gebauer 2011; Lawson & Samson 2001; Wang & Ahmed 2007);
- Competition in the business environment for newer resources (Ambrosini & Bowman 2009; Barney 1986, quoted in Grant 1996, p. 376) including situations in which technological change is rapid (Augier & Teece 2009; Gebauer 2011; Teece 2007; Zollo & Winter 2002) and increasing commoditisation (Gebauer 2011);

- The need for organisations to acquire, integrate and apply specialised knowledge (Sher & Lee 2003) which is an essence of capability (Grant 1996) and in which customer value may be created (Landroguez, Castro & Cepeda-Carrión 2011);
- Organisations pioneering new markets need to adapt (Katkalo et al. 2010);
- Changes in market and legal regulations (Lawson & Samson 2007; Zollo & Winter 2002).

A further finding is that many organisations do not possess enough agility to rapidly develop new competencies (Dierickx & Cool 1989). Thus the field of dynamic capability is a future-oriented one (Ambrosini & Bowman 2009) in which organisations prepare their competitive resources to achieve competitive advantage and '*dynamic capabilities are a source of sustained competitive advantage*' (Wang & Ahmed 2007, p. 36). Additionally, Ruefli and Wiggins (2002) cited in D'Aveni, Dagnino and Smith (2010) propose that competitive advantage is actually rare, becoming shorter in duration and (as D'Aveni et al. 2010 continue) '*there is no consistent body of evidence that dynamic capabilities are sustainable over extended periods of time*' (p. 1372).

2.3.3.4 Requirements for successful dynamic capability development

Dynamic capabilities can't be bought and organisations must be able to develop them (Ambrosini & Bowman 2009; Katkalo et al. 2010) and whilst the external business environment may influence an organisation's business strategies it does not determine it (Aragon-Correa & Sharma 2003). Additionally, whilst an organisation's resources and capabilities may serve to achieve short-term competitive returns, the acquisition of superior returns may not be sustained in the absence of dynamic capabilities (Augier & Teece 2009). Some of the major requirements for successful implementation of dynamic capabilities include:

- Senior management commitment and leadership (Ambrosini & Bowman 2009; Landroguez et al. 2011; Lawson & Samson 2001; Nonaka & Toyama 2007; Samson 2001)

and learning (Pettus 2001; Zollo & Winter 2002) leading to management's seizing of opportunities (Augier & Teece 2009; Easterby-Smith et al. 2009; Hodgkinson & Healey 2011) after careful consideration of the available options (Lawton & Rajwani 2011);

- A business model developed to meet particular consumer requirements (Teece 2010);
- Correct organisational governance (Augier & Teece 2009);
- A strong organisational knowledge base and strong management (Bhatt 2002; Teece 2007; Verona & Ravasi 2003; Wang & Ahmed 2007; Zahra et al. 2006), including learning mechanisms (Zollo & Winter 2002) leading to strong intellectual capital (Pöyhönen & Smedlund 2004; Sher & Lee 2003) as well as a strong psychological alignment amongst management to understand market signals (Hodgkinson &Healey 2011);
- Committed, skilled and specialised personnel (Augier & Teece 2009; Bhatt 2002; Winter 2003) who understand the causal mechanisms connecting their actions and performance outcomes (Zollo & Winter 2002);
- Coherently aligned resources and assets (including human resources, information technology and finances) to facilitate full functioning of the capabilities (Augier & Teece 2009; Easterby-Smith et al. 2009; Melville et al. 2007; Rothaermel & Hess 2007; Sher & Lee 2004; Verona & Varasi 2003; Wheeler 2002; Winter 2003);
- Psychological preparedness of the organisational members involved (Jones, Jimmieson & Griffiths 2005).

Additionally, Ilinitch, D'Aveni and Lewin (1996) propose that with growing competition, organisations could develop and establish models in which contradictory goals may be achieved when dealing with adversity, for example flexibility through stability, or diversification through focus. Another important topic discussed by Nonaka and Toyama (2007) is that the variations in value-creation by organisations (and the strategies ultimately adopted and applied) are not only due to resource acquisition costs and mobility barriers but also because, due to the various types of envisioning practiced by organisations, their views, values and ideals differ.

Identifying all possible requirements for implementing dynamic capabilities in organisations is beyond the scope of this thesis. However, having considered several major requirements for the successful implementation of dynamic capabilities in organisations, I will now expand on a major area which surfaces in much of the academic literature: the provision by management of effective intra-organisational communication and the management of a key resource – knowledge.

2.3.3.5 Management and leadership in dynamic capabilities

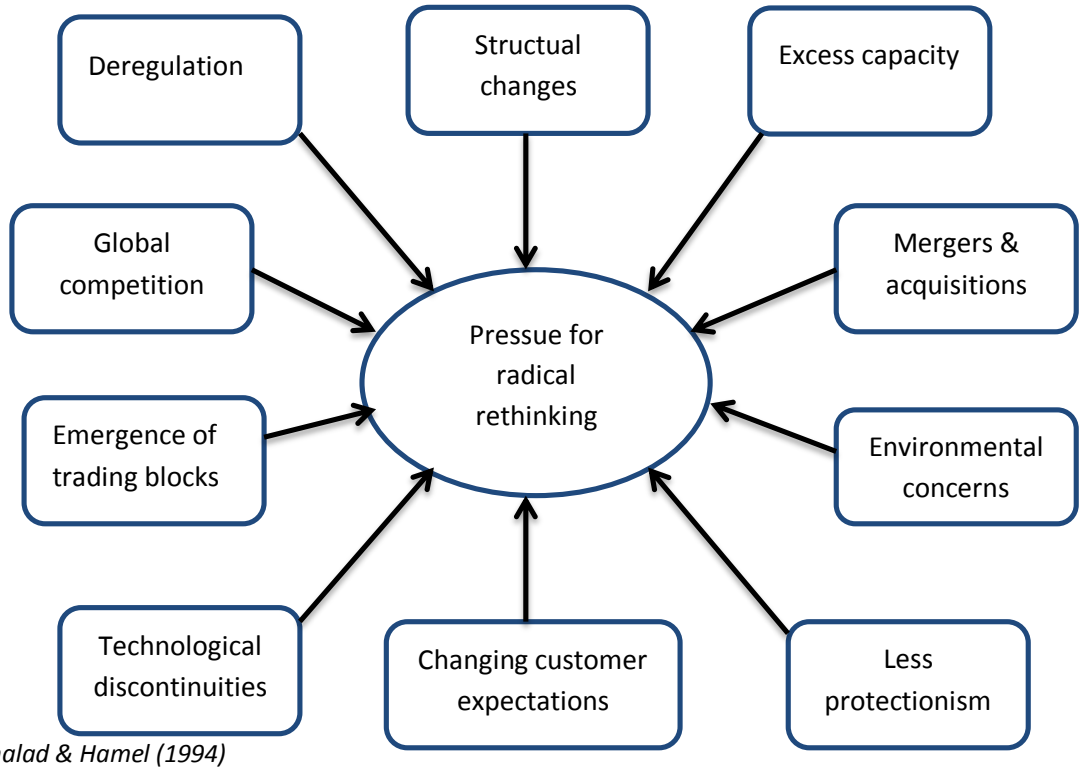
The ability for organisations to achieve and sustain long-term competitive advantage is diminishing (Wiggins & Ruefli 2005, quoted in Barreto 2010, p. 257), necessitating increased management focus to which routines are closely related (Gebauer 2011). Because of their prevalence in the literature, I will discuss the importance of committed management and leadership in regard to dynamic capabilities when an organisation's management is challenged with the task of successfully responding to rapid innovation in a timely manner (Wheeler 2002). Thus the paradigm of dynamic capabilities '*helps explicate the role of strategic managers … in a market economy*' (Augier & Teece 2009, p. 410).

For dynamic capabilities to be successful in attaining desired organisational goals, their management is of importance (Teece 2007; Martin & Eisenhardt 2004; Zahra et al. 2006) and Gebauer (2011) concludes that innovations introduced by management '*are most coherent with the phases of sensing, seizing and reconfiguring and support the objectives of each phase*' (p. 1243). Managers should be aware of the changes which their organisations are experiencing as a result of the environments in which they operate and in which management must develop and implement dynamic capabilities to deal with these changes. Such changes may include (but are not limited to):

- increasingly competitive business environments (Alderighi & Cento 2005; Augier & Teece 2009; Bhatt 2002; Blanchard 2010; Hänninen 2009; Mutihac 2010; Taylor 2003; Wheeler 2002; Zollo & Winter 2002) including hypercompetition (Ilinitch et al. 1996);
- the need to increase business effectiveness of competitors (Bora 2010; Cowan-Sahadath 2010; Papazoglou & van den Heuvel 2000);
- demographic shifts (Ilinitch et al. 1996; Purdy, Davarzani & Peppes 2010);
- takeovers and acquisitions (Mutihac 2010);
- skills shortages (Martin & Healy 2009; Taylor 2003; Watson 2008);
- globalisation and liberalisation (Graetz 2000; Kanter, Hesselbein & Shrader 2008; Martin & Healy 2009) in which competition rules are changing (Koivisto 2005) and protectionism is diminishing (Prahalad & Hamel 1994);
- organisational restructuring (Rousseau & Tijoriwala 1999; Sullivan, Sullivan & Buffton 2001);
- rises in new technology (Beer & Nohria 2000; Frederick 1998; Kanter et al. 2008; Melville et al. 2007; Rousseau 1996; Tollén & Frålund2010; Tsiotsou & Ratten 2010);
- high staff turnover (Ganek & Kloeckner 2010; Rieley & Clarkson 2001);
- the introduction of new business models (Vlaar, De Vries & Willenborg 2005).

Prahalad and Hamel (1994) summarise the pressures acting on organisations to change as per Figure 2.6 (over page), which leads to the need for organisations to implement radical new thinking in order to achieve and maintain a sustainable competitive advantage.

Figure 2.6: The inevitability of industry transformation



Source: Prahalad & Hamel (1994)

As Zahra et al. (2006) discuss, the development of dynamic capabilities does not necessarily lead to superior performance but in industries where the market volatility is great, the benefits of dynamic capability may be high and so '*the potential value of the dynamic capabilities is moderated by the dynamism of the external environment*' (p. 16). Furthermore, Wang and Ahmed (2007) argue that there is a parity between organisational dynamic capabilities and market dynamism in which the former acts as an antecedent to the latter with the result that '*the more dynamic a market environment, the stronger the drive for firms to exhibit dynamic capabilities in light of external changes*' (p. 40). Moreover, organisations with more effective dynamic capabilities may prove to be more successful than others and accordingly, the more dynamically capable an organisation is the more nimble it is in adjusting to change (Jones et al. 2005; Tollén & Frålund 2010).

2.3.3.6 Communication and dynamic capabilities

Teece (2007) argues that in addition to the actual commitment pledge (to achieve dynamic capabilities) on the part of organisational management, it is important that management creates an environment in which there is a free flow information and that there are incentives for staff to be involved and communicative (Jones et al. 2005).

2.3.3.7 Resources for dynamic capabilities

Management's allocation of resources, its investment decisions and its filtering of information are of major importance to the development of dynamic capabilities (Augier & Teece 2009; Sher & Lee 2004; Teece 2007). In terms of dynamic capabilities, organisational competence refers to an organisation's '*ability to integrate and manage its available resources or firm-specific assets*' (Hong & Stahle 2005, p. 136). Applying a resource-based view may be considered to be an organisation's '*most valuable resource for successful business*' (Hong & Stahle 2005, p. 139). Additionally, Bergh et al. (2010) stress that for a resource to be considered strategic it must have value, rarity and inimitability and good organisation must be applied to exploit the resource's potential. However, the availability of cash as a resource on the part of the airlines does not necessarily guarantee long-term competitive advantage. Ilinitch et al. (1996) suggest that though organisations with deep pockets may be able to create new advantages which are necessary to remain in competition, they may not be able to implement them continually in the long run.

2.3.4 Dynamic capabilities in civil aviation

Barreto (2010) discusses the importance of further research to identify the types of organisations for which dynamic capabilities would be most appropriate and so far, current

writings tend to apply dynamic capabilities to more rapidly changing industries, such as information technology and semi-conductors (Easterby-Smith et al. 2009). Dynamic capabilities as a paradigm within strategic management studies has been applied in civil aviation studies (e.g. Alderighi & Cento 2005; Harrington, Lawton & Rajwani 2005; Lawton & Rajwani 2011).

Some writers such as Easterby-Smith et al. (2009) and Helfat and Peteraf (2003) postulate that dynamic capabilities may also be applied to industries which are at least moderately dynamic. Turner and Lucas (1984) assert that '*dynamic industries are characterized by emerging scientific knowledge, markets, and a variety of customer needs that make the dominant competitive issue the ability to innovate*' (p. 31). In contrast, Burke and Hanley (2010) characterise dynamic industries as those whose rates of entry and exit of organisations are high. Finally, Alderighi and Cento (2005) postulate that aviation is one of the most dynamic industries. This presents a challenge for the subject of this thesis in which dynamic capabilities may be applied to airlines involved in the Australian civil aviation industry, which the background literature identifies as a competitive one, especially with regard to two aspects of the industry: deregulation and new market entrants, namely LCCs from whom incumbent airlines have not traditionally experienced competition (Burke & Hanley 2010). This is not to suggest that the paradigm of dynamic capabilities has never been academically applied to airlines. Lawton and Rajwani (2011) typified the ability to lobby as an example of a dynamic capability and applied this to airlines' abilities to lobby legislators in order to gain change or alignment with change. In fact they found that state-owned airlines were more likely to succeed in the dynamics of lobbying their respective governments (and thus achieving success at alignment with changing political environments) than privately owned airlines.

2.3.4.1 Airlines' managements and dynamic capabilities

Because civil aviation is an industry in which the ability to change is crucial to commercial success and competitive advantage (Brown & Eisenhardt 1997), agile quality management and leadership will be required on the part of airlines' management in order to align airlines with various changes as they occur and the two must be employed simultaneously (Bruch et al. 2005). Here, the concept of dynamic capabilities may be applied by airlines' managements to achieve success in acquiring that competitive advantage from which financial profitability may eventuate, recalling that the implementation of good dynamic capabilities does not necessarily equate to competitive advantage (Barreto 2010). It is not just civil aviation, but the tourism industries as a whole that are identified as being quite dynamic (Tsiotsou & Ratten 2010).

Quality management and leadership will be required on the part of airlines so that they may be able to cope with environmental changes (namely an ever-growing cohort of old travellers) and this ability to change must be imbued at a micro-political level in the airlines amongst both management and staff, to effect efficient, appropriate and timely dynamic capabilities. Airlines must come to terms with customer requirements if they are to remain competitive (Herstein & Mitki 2008; Park et al. 2006) and this situation will become even more challenging as airlines move away from operating in isolation and work more as part of business networks in which strategic dependence becomes key, and where the acceptance of airlines' peers becomes essential (Hänninen 2009). Teece et al. (1997) argue the importance of applying dynamic capabilities in highly competitive environments so that protracted understanding of how competitive advantage is achieved may be reached.

Having identified the competitive environment which civil airlines operate, and having postulated that civil aviation is at least a moderately competitive industry, I consider that dynamic capabilities is an important change management tool for airlines to apply.

2.3.4.2 Causal factors for changes in airlines

For multiple reasons airlines are subject to change which demonstrates that civil aviation is an industry subject to market changes which means that the implementation of dynamic capabilities is needed. Some of these potential changes are:

- fluctuating fuel prices (Banstetter 2008; Czipura & Jolly 2007; Gkritza, Niemeier & Mannering 2006; Harrington et al. 2005; Kingsley-Jones 2009; Rubin & Joy 2005);
- deregulation (including route liberalisations – so-called '*open skies*') and privatisation bids (e.g. Alderighi & Cento 2005; Carson 2001; Duffy 2003; Endres 2007; Herstein & Mitki 2008; Ionides 2004; Ringle, Sarstedt & Zimmermann 2011; Wang 2007), though there still remain many regulatory impediments which various governments could further liberalise (Button & Drexler 2006; Knibb 2010; O'Connell & Williams 2006) in which airlines' management are required to undertake lobbying capabilities as a typification of dynamic capabilities to achieve change or alignment to change (Lawton & Rajwani 2011);
- environmental issues, such as carbon offset schemes (Anger 2010; ATAG 2008; Brouwer, Brander & Beukering 2008; Lee, Fahey, Forster, Newton, Wit, Lim, Owen & Sausen 2009; Macintosh & Downie 2008; Petersen 2008);
- human resources restructuring and labour market deregulation (Blyton, Lucio, McGurk & Turnbull 2001; Carrig 1997; Langer & Thorup 2006);
- increased competition and hyper-competition (Ilinitch et al. 1996), especially from low-cost carriers (e.g. Button, Costa & Cruz 2007; Burghouwt 2007; Dennis 2007; Harrington et al. 2005; Marx 2005; Ringle et al. 2011; Rubin & Joy 2005; Teece 2010; Vlaar et al. 2005) rendering more challenges in product/service differentiation and reducing airfares (Atal, Kampüsü, Turkey & Arslan 2009; Tollén & Frålund 2010);

- increased business networking including strategic alliances (Bieger & Wittmer 2011; Briones & Nguyen 2007; Flores-Fillol 2009; Hänninen 2009);
- Increased disposable income on the part of travellers and/or airfare reductions on the part of airlines (Patterson & Pan 2007; Reisenwitz & Iyer 2007; Wang & Song 2010);
- newer emerging technologies leading to improved and more efficient inventory management, including SSTs and ticket purchases/issuances (Drennen 2011; Grant 1996; Hassan 2004; Locke 2009; Rubin & Joy 2005; Slaughter 2004);
- safety and security issues (Alderighi & Cento 2005; Batra 2009; Birch 2008; Clemes, Gan, Kao & Choong 2008; Elliott 2003; Conkey & Pasztor 2009; Gkritza et al. 2006; Harrington et al. 2005; Moufakkir 2010; Peterson, Bittel, Forgie, Lee & Nestor 2007; Yeoman et al. 2011);
- greater financial challenges in general (Abbott 1993; Balmer, Stuart & Greyser 2009; Bruch & Sattelberg 2001; Carey & McCartney 2004; Dolnicar, Grabler, Grün & Kulnig 2010; Flottau 2007; Grant 1996);
- increasing demand for air travel in parity with growing aircraft orders (Balasubramanyam 2010; Clark 2010; Pilling 2010);
- growing endogamic and exogamic airline alliances which are customer-focused, such as SkyTeam, Star Alliance and One World (Ahmed et al. 2006; Czipura & Jolly 2007; Knibb 2010; Mockler, Dologite & Carnevali 1997);
- mergers, takeovers and equity investments (Burghouwt 2007; Lee & Geddie 2006; Mazzeo 2003; Mockler et al. 1997; Newman 2003; Swan 2007).

The International Civil Aviation Organisation (ICAO) conference on world airline liberalisation in Montreal, Canada in 2003 supported the further liberalisation of airlines on the part of governments, a call which many of the latter have heeded to including the Australian Government. Pressures for liberalisation are not stochastic and although the liberalisation of aviation is not a new concept (Button & Drexler 2006; Douglas & Miller 1974; Eads 1974; Keeler

1972), it is one which has gained momentum since the 1990s. This increasing rate of liberalisation means that Australian airlines will require dynamic capabilities to negotiate the potentially emerging markets in which newer airlines will be permitted to enter the Australian civil aviation market. As aviation liberalisation materialises not only globally but also locally, competition on the part of new market entrant airlines may be anticipated and it has been demonstrated that market entrants will commence competition moves against fully fledged airlines by competing on price rather than service quality (Childs 2000; Gil 1990; Lian & Denstadli 2010; Ringle et al. 2011). There is a need for well-established airlines to be dynamically capable of competing with newer airlines, including LCCs.

Since the late 1980s and the early 1990s a number of major airlines have come out from near bankruptcy (if not full bankruptcy) and attained full recovery due to the good skills of some excellent change agents (Balmer et al. 2009; Bruch & Sattelberg 2001; Carrig 1997) and it is leadership like this which will be required by airlines to remain sustainable, coupled with effective communication skills (Birch 2008; May 2004) especially in the wake of increasing liberalisation and the consequent emergence of LCC competition. This increase in liberalisation and competition means that airlines must be more appropriately prepared for financial challenges.

As discussed earlier in this thesis, there has been an ongoing change in Australia's population demographics concomitant with the higher disposable incomes of baby boomer citizens and as a result, their greater financial ability to travel. The size and increasing importance of the baby boomer generation may well affect the patterns of future travel activity (Glover & Prideaux 2009). Such demographic shifts, coupled with increased competition, necessitate an increased requirement for airlines to develop strong dynamic capabilities to deal with the changes in their operating environments. Furthermore, the drive towards airline alliances has become more popular due to market and industry requirements leading to activities which affect the

operations of multiple airlines as single carriers (Bieger & Wittmer 2011; Mockler et al. 1997). These alliances could potentially mean more complex capabilities for airlines to cooperate with their alliance partners.

Effective change management techniques (including team building and effective communication between staff and management) were instrumental in achieving success in the change management programs implemented at El Al Israel Airlines (Herstein & Mitki 2008), Air China (Ahmed et al. 2006) and Lufthansa (Bruch & Sattelberg 2001).

2.3.4.3 Deregulation, competition and dynamic capabilities in the airlines

Because deregulation is an activity leading to change, increased competition (Ringle et al. 2011) and subsequently, the need for airlines to be dynamically capable, some contemporary cases of deregulation in airlines leading to dynamic capabilities development is discussed in this subsection. This serves to provide examples of dynamic capability at work in civil aviation.

Applying their study of Ireland's national carrier Aer Lingus and its transformation from government to private ownership, Harrington et al. (2005) stress the importance of leadership in airlines' dynamic capabilities in which chief executive officers (CEOs) need to '*react ever faster and more creatively to take opportunity of the risk to which their competitors are exposed*' (p. 450). This was especially so in this case as the incumbent airlines involved (British Airways and Aer Lingus) had not been traditionally used to competition (Burke & Hanley 2010). Many incumbent airlines relied on landing slots at airports to block entry to LCC rivals (Burke & Hanley 2010). Harrington et al. (2005) argue, that as a result the LCCs of Europe have been able to compete with established flag-carriers (or *legacy* or *fully fledged* carriers) due to their lack of entrenched routines and rigid management structures.

Civil aviation is a service-based industry, and innovation in service leads to economic growth (den Hartog, van der Aa & de Jong 2010). It is logical to postulate that because of this, coupled with the finding by Berry (1990, quoted in Hoberg & Phillips 2010, p. 6) that '*product differentiation is integral to airline growth strategies*', ongoing innovations in airlines are essential for their survival, especially as further deregulation invites more market entry. This is reinforced by Teece (2010) who discusses the importance of organisations developing differentiated products to achieve competitive advantage.

Grant (2002, quoted in Vlaar et al. 2005, p. 156) argues that incumbent airlines experience difficulty in competing with LCCs due to their cost structures, labour agreements and commitments to service customers over vast networks. Thus, an organisation's future behaviour is constrained by set routines and previous investments (Teece et al. 1997) which become rules and expectations (Vlaar et al. 2005). This is supported by Harrington et al. (2005) who postulate that because LCCs don't have the rigid management structures and operational routines of established carriers, the strategic void may be filled by LCCs. However, Vlaar et al. (2005) argue that the advent of LCCs has compelled incumbent airlines to lower airfares and that due to the lack of established networks, LCCs are not compelled to consider reductions in profits from other operations (Vlaar et al. 2005).

2.3.5 Stakeholder theory

Reported in chapter 4 are the interview responses of 32 respondents who were sampled as members of tourism stakeholder groups (including baby boomer travellers). Because of the relationship between the airlines and their tourism industries' stakeholders it was resolved that the academic field of stakeholder theory would provide further useful understanding of the data aggregated from the participants as a result of the interviews conducted. Stakeholder holder theory first appeared in academic literature in 1984 when it was detailed by Edward

Freeman (Jansson 2010; Littau, Jujagiri, Adlbrecht & Sen 2011). Freeman's work was a '… *proposal for the strategic management of organisations in the late twentieth century*' (Emerson Wagner, Alves & Raposo 2011, p.226).

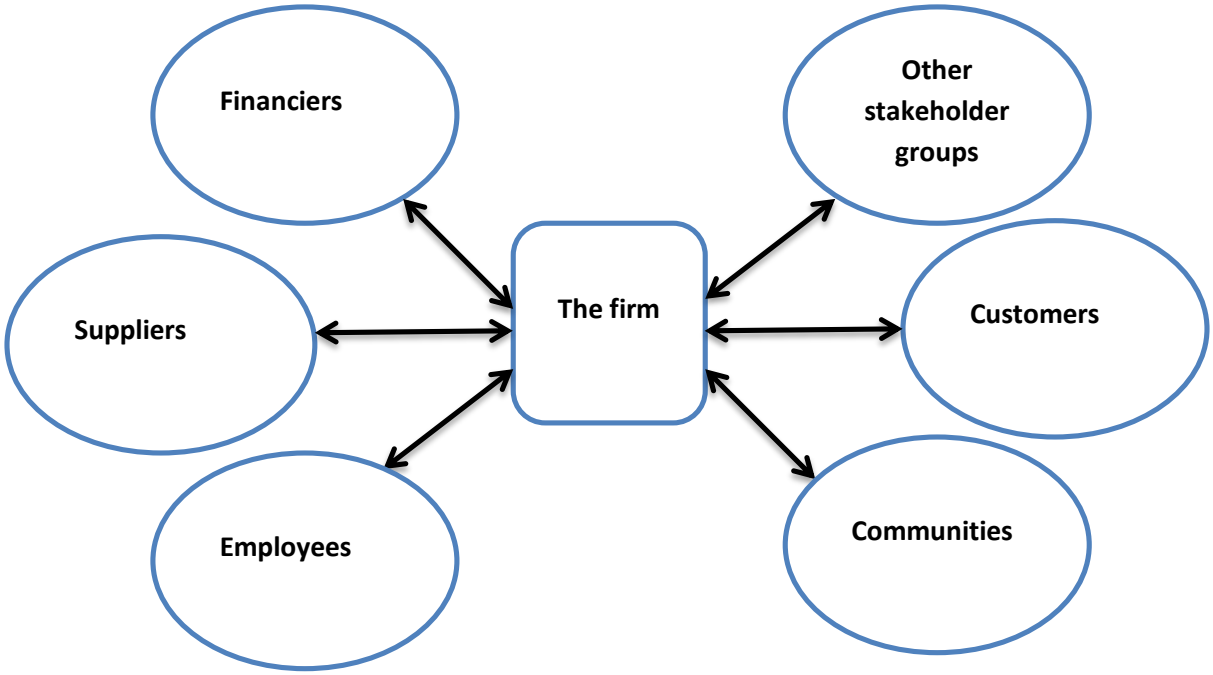
The original concept of stakeholder theory was coined by Stanford Research Institute in 1963 (Emerson Wagner et al. 2011; Sen 2011). Emerson Wagner et al. (2011) further discuss that various researchers define stakeholder theory as many ways. However, an organisation '… *must consider the requirements, interests and influences of peoples and groups who either impact or may be impacted by its policies and operations*' (Frederick et al. 1991, quoted in Emerson Wagner 2011, p. 228). Antilla & Kretzschmar (2010) concur with this by stating that '…*that corporations are more than autonomous individual actors, and are playing a role in a community that places obligations, expectations and responsibilities upon them*' (p. 20).

Diagram 2.1: Stakeholder groupings

Source: Viaglobus (2010) quoted in Anttila &Kretzschmar (2010, p. 22)

Furthermore, Sen (2011) expounds that the various stakeholder theories defined by multiple researchers eventually relate back to the *hub and spoke* model developed by Bowie (2002) as depicted in figure 2.7.

Figure 2.7: Stakeholder theory *hub & spoke* model



Source: Bowie (2002, quoted in Sen 2011, p. 30)

Sen (2011) asserts the importance of applying stakeholder theory in management literature. Stakeholder theory asserts that because of the relationship between an organisation and its consumers, the former must show attention to the latter (Harrison & Wicks 2013). Bundy et al. (2013) furthers this assertion by discussing the importance of organisational responsiveness to stakeholder concerns. Moreover, Laczniak & Murphy (2012) establish that because customers utilise an organisation's product(s), they are indeed stakeholders. Supporting these views, Hasnas (2013) applied stakeholder theory to analyse an organisation's normative obligations to its stakeholders, to which it must provide fair treatment for its own survival (Juha-Antti et al. 2008).

2.3.6 Stakeholder theory in civil aviation

Section 2.3.5 presented a brief overview of the importance of stakeholder theory to organisations' managements. In this this section I briefly will discuss the field of stakeholder theory in pertinence to the tourism industries. Waligo, Clarke and Hawkins (2013) discuss the growing importance of stakeholders' involvement in sustainable tourism and overall importance of stakeholder. Tourism stakeholders may include:

- Accommodation providers (Bornhorst, Brent Richie & Sheehan 2010; Inoue & Lee 2011; Jamal & Getz 1995; Tkaczynski 2009);
- Airlines (Inoue & Lee 2011);
- Bus operators (Dabphet, Scott & Ruhanen 2012; Vellecco & Mancino 2010);
- Direct marketing organisations (Tkaczynski 2009);
- Educational institutions (Carlisle, Kunc, Jones & Tiffin 2013; Omerzel 2011; Waligo et al. 2013);
- Government/Local authorities (Dabphet et al. 2012; Munanura & Backman 2012; Omerzel 2011);
- Host communities/Local residents (Dabphet et al. 2012; Jamal & Getz 1995; Kuvan & Akan 2012);
- Tourism managers (Kuvan & Akan 2012);
- Tour operators (Tkaczynski 2009);
- Travel agents (Vellecco & Mancino 2010);
- Travellers and tourists (Dabphet et al. 2012; Waligo et al. 2013);

Jansson (2010) discusses the prevalence of consumers (i.e. travellers and tourists as identified by Dabphet et al. 2012 and Waligo et al. 2013) as stakeholders for the civil aviation airlines. Specifically, she identifies the benefits available to consumers as a result of airline deregulation,

namely potentially lower pricing of services to the entry of newer competition. Anttila & Kretzschmar (2010) further this, by asserting that '*Customers wishing to fly are primarily concerned with two key issues; price and level of customer service* (p.34)'. They concluded that '*Excellent customer service can therefore provide a competitive advantage for airlines*' (p.36).

2.3.7 Parent literature: Data propositions

Having identified dynamic capabilities as the academic field of strategic management which will serve as a lens to interpret the expected rich data to be extracted in this research, I will now proceed to discuss the anticipated findings pertinent to the parent literature.

It is anticipated that the data will reveal the importance for airlines to adapt to changes in civil aviation, namely deregulation which will lead to increased competition, especially from LCCs. It is expected that there will be some contrasting of particular airlines to others in which LCCs could be named and compared to fully-fledged airlines.

Given the importance of issues relevant to aviation medicine, it is expected that participants in this research will make suggestions for changes to airlines' practices pertaining to medical issues. This may include improved measures aimed at increasing traveller knowledge regarding possible medical episodes (such as DVT) and increased provisions of in-flight equipment such as defibrillators, compression stockings and drinking water.

Increased globalisation leading to deregulation (BITRE 2008; Compart 2008; Creedy 2008) and subsequent competition will lead to themes associated with the arrival of LCCs in Australia, such as Tiger Airways and Jetstar. Therefore participants are expected to discuss issues such as the ability of airlines to maintain good customer service and communication skills amongst

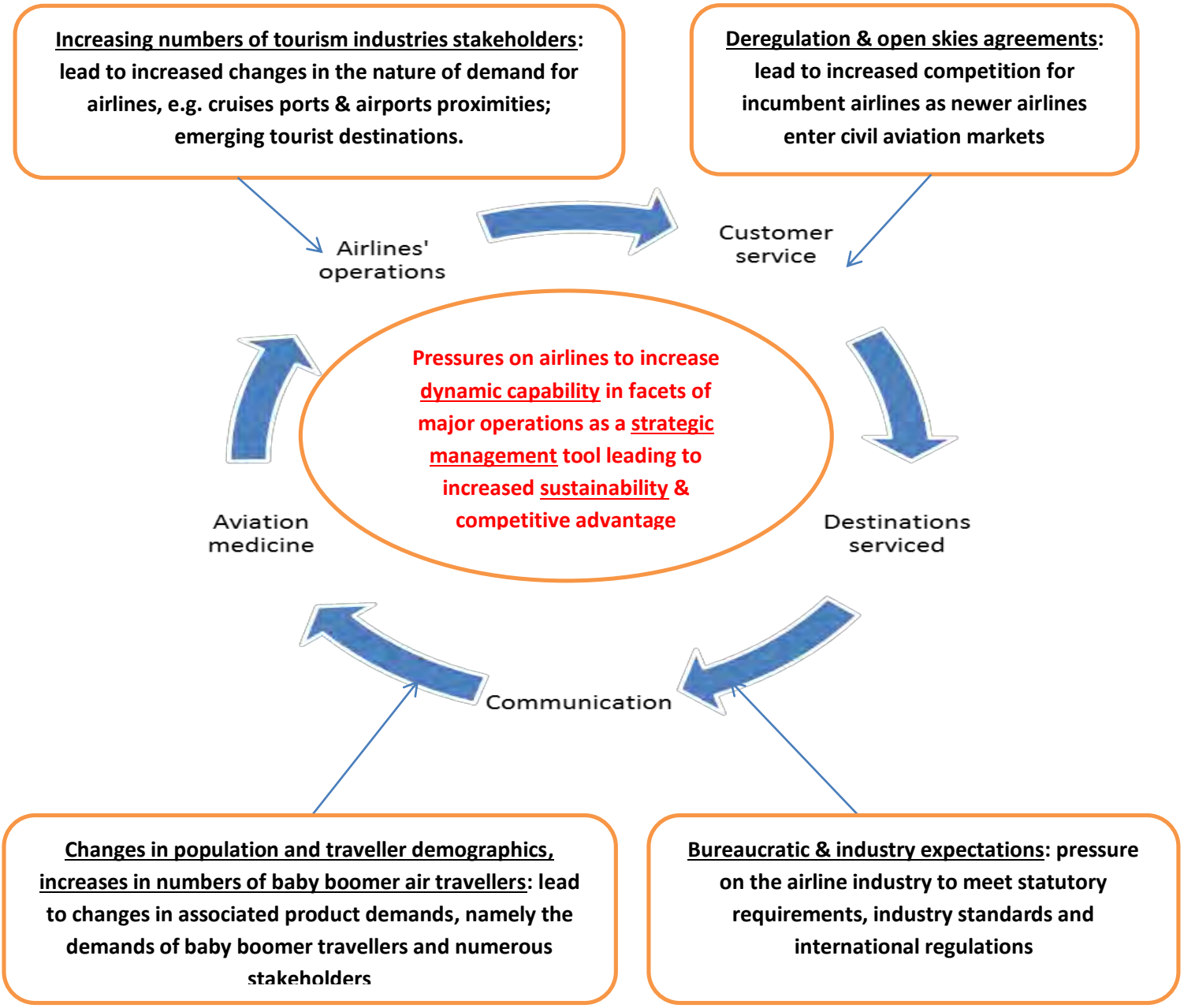
their staff, the ability to implement user-friendly IT systems, the ability to be proactive in the wake of increased competition (especially from LCCs) and security themes.

It is anticipated that the participants in this research will express concern at the cost-cutting measures employed by various airlines, such as tight spacing between seats and lack of meals and accordingly there could also be discussion in regard to some more affluent baby boomers choosing higher levels of quality in air travel such as premium economy class. The comparison and contrasting of services and practices implemented amongst LCCs and fully-fledged airlines are also expected to emerge.

2.3.8 Parent literature summary

Because of the increasing prevalence of deregulation which leads to the advent of newer market entrants, particularly LCCs, civil aviation may be viewed as an industry in which strategic management requiring an airline to become increasingly dynamically capable (to negotiate the changes in the competitive environment), is crucial for the purposes of achieving competitive advantage. I present a concept map in figure 2.8 (over page) which depicts the pressures exerted on airlines, making it important for them to become dynamically capable to adapt to the pressures of increasing competition and deregulation with the view to achieving sustainable and financially profitable operations, having negotiated and survived the environmental turbulence.

Figure 2.8: Pressure on airlines to become more dynamically capable



Source: Developed for this thesis

In this sub-section (2.3) I have considered literature which could provide the research with a lens for interpreting the expected results, and I have chosen to utilise the field of dynamic

capabilities within the field of strategic management. In the next subsection (2.4) I look at relevant research in the immediate field of baby boomers travelling by air.

2.4 Immediate literature

In section 2.3, the parent literature, strategic management has been explored and accordingly the research will use the lens of dynamic capabilities (a sub-field of strategic management) as an aid to the interpretation of the results of this thesis. This is done in Chapter 5. The immediate literature, which is directly related to aviation and baby boomer consumers, is now explored. Areas of concern for airline operations could include, but are not limited to:

- aviation medicine;
- airline ground services;
- aviation security;
- in-flight comfort;
- destination selection;
- customer service/communication.

I will now discuss in more detail these abovementioned areas. This will be followed by Section 2.4.7 which will discuss the anticipated research outcomes (data propositions) of this thesis in relation to the immediate literature.

2.4.1 Aviation medicine

Historically, the advent of global air travel made it easier for infectious diseases to spread (Gezairy 2002; Warren, Bell & Budd 2010) and long distance flying can potentially become the cause medical problems for travellers and air crew (Coste, Van Beers & Touitou 2007; Ruskin,

Hernandez & Barash 2008; Shesser 1989). Warren et al. (2010) argue that the liberalisation of civil aviation potentially establishes more entry points for exotic diseases to a country, a situation labelled by Harrington et al. (2005) as the spread of *transnational diseases* (p. 452).

As discussed in a plethora of articles, the health of baby boomer airline travellers of varying age brackets has emerged as a growing concern in recent years and academic articles demonstrate varying levels of airline management awareness of the growing number of baby boomer travellers and associated health issues, especially as air travel becomes more accessible to the population (Abeyratne 2001; Bettes & McKenas 1999; Brundrett 2001; Chee & Watson 2005; Davis & DeBarros 2008; Delaune, Lucas & Illig 2003; Donaldson & Pearn 1996; Edwards 2005; Jorge, Pombal, Peixoto & Lima 2005; Low & Chan 2002; Martin, Bradley, Buick, Bradbury & Elborn 2007; McIntosh 2006; Mohr 2008; Morgan 2002; Nicholson, Cummin & Giangrande 2003; Page, Joglar, Kowal, Zagrodzky, Nelson, Ramaswamy, Barbera, Hamdan & McKenas 2000; Rayman 1997; Ruskin et al. 2008; Schindler 2005; Silverman & Gendreau 2009; Zitrin 2009). Furthermore, a concern regarding air travel is the increase in the number of travellers with poor health (Muir & Thomas 2004) and travellers (regardless of age) requiring more urgent and immediate medical attention, including those travellers who may need to travel with an escort capable of providing that attention (Perry 2004). Additionally, Worsley, Wang and Hunter (2011) emphasise the importance of service organisations providing healthy meals to baby boomers, a cohort whom the researchers report expect higher quality food.

Because not all medical emergencies (including deaths) are reported (whether required by statute or otherwise), it is difficult to determine precisely how many medical episodes arise on commercial flights (Cocks & Liew 2007; Drummond & Drummond 2002; Goodwin 2000; Nordenberg 1998; Rayman, Zanick & Korsgard 2004; Ruskin et al. 2008; Speizer, Rennie & Breton 1989). Delaune et al. (2003) and Ruskin et al. (2008) recommend mandatory data banks of in-flight medical episodes. Furthermore, as larger and more long range aircraft are being

supplied to airlines (Abramowitz & Gertz 2007; Donaldson & Pearn 1996; Hinninghofen & Enck 2006; Muir & Thomas 2004), more passengers are able to fly and as more passengers fly, the chances of in-flight emergencies are increased (Linthorst & Ploem 2006; Ruskin et al. 2008; Wong 2009) including those episodes involving baby boomer passengers (Cocks & Liew 2007; Coker, Shiner & Partridge 2007; Gardelof 2002; Goodwin 2000; Rayman et al. 2004). In contrast, whilst citing that the highest rates of in-flight medical episodes tend to prevail amongst air travellers aged 70 years and above, Silverman and Gendreau (2009) report that the mean ages for in-flight medical emergencies are 44 for males and 49 for females whilst Macleod (2008) identifies males above the age of 50 years as being most at risk. Additionally, Silverman and Gendreau (2009) postulate that the provision of lower altitude cabin pressurisation in newer aircraft (namely the Airbus A380 and the Boeing 787) could lead to improved passenger wellbeing and comfort.

Weinlich, Nieuwkamp, Stueben, Marzi and Walcher (2009) in a study of telemedical assistance found that the majority of in-flight medical episodes involved middle aged and not elderly passengers. Physicians, nurses and other medical practitioners are increasingly being called upon to administer medical procedures in-flight (Dowdall 2000; Goodwin 2000; Nordenberg 1998; Rayman et al. 2004; Ruskin et al. 2008; Shesser 1989; Tonks 2008; Wong 2009). Donaldson and Pearn (1996) stress that air crews should be further trained in in-flight medical procedures in addition to the first aid training already received but it must also be noted that the ultimate responsibility for the welfare and safety of the passengers and crew of a flight lies with the captain (Drummond & Drummond 2002; Macleod 2008).

A number of airlines have been implementing measures to address medical issues with passengers and bring the latter to a greater awareness of prevailing medical conditions in respect to flying. Many airlines have produced reading materials as well as articles inserted into in-flight magazines pertaining to aviation medicine (James, Crumley, Cullinan, Donnelly, Harding

& Sautter 2001). In 1991, Qantas became the first airline to install automatic external defibrillators (AEDs) on all international routes and throughout airports terminals (Drummond & Drummond 2002).

The prevalence of global travel medicine practices is rising (Carroll, Behrens & Crichton 1998; Teichman, Donchin & Kot 2007; Zuckerman 2002). Travellers are increasingly seeking medical advice prior to travel (Silverman & Gendreau 2009) and this is a growing field of medicine as an increasing number of travellers go to more exotic and remote destinations (Kozarsky & Keystone 2002; Ropers, Krause, Tiemann, Holle & Stark 2004; Sloan 1993). Ingle, Hobkirk, Damy, Nabb, Clark & Cleland (2012) caution that the increasing ability of baby boomer people to travel may result in an increase in cases of CHF (chronic heart failure).

Medical clearances

Air travel imposes multiple physiological demands on the human body (Shand 2000). Medical clearances, including those for aged travellers, are inclusive of in-flight oxygen and medications (Jorge et al. 2005) which are not only important for the safety of the travellers requesting the clearances but also for the overall wellbeing of flights, because they minimise the risk of disruptions (Cocks & Liew 2007). Gezairy (2002), Reed (2007) and Shand (2000) recommend pre-travel medical clearances and cite the growing factor of old age travellers. They also recommend for medical clearances to be at least 4 to 6 weeks prior to departure and they also recommend prophylactic measures aimed at ensuring health precautions prior to travel, not only for the benefit of the individual traveller, but for the public at large as well (Van Herck, Castelli, Zuckerman, Nothdurft, Van Damme, Dahlgren, Gargalianos, Lopéz-Vélez, Overbosch, Caumes, Walker, Gisler and Steffen 2004). As a test for determining fitness to fly, Cooper (2006) states that the ability to walk a city block or climb a flight of stairs without shortness of breath is generally a reasonable indicator of fitness to fly, though Cooper makes no mention of age.

Batra (2009) argues that travel can improve the physical and psychological health of baby boomer travellers.

To identify and discuss every type of medical episode which may arise on flights (even only those pertaining to the baby boomer traveller) is well beyond the scope of this thesis and beyond the time resources allocated to its completion. Accordingly, I have selected a few of the main medical conditions associated with air travel and these are discussed as follows:

2.4.1.1 Deep vein thrombosis (DVT)

DVT, also known as *economy class syndrome* or *travellers' syndrome* (Feltracco, Barbieri, Bertamini, Michieletto & Ori 2007; Hinninghofen & Enck 2006) is a direct result of prolonged air travel (especially in cramped economy class cabins). It was first diagnosed in 1954 (Hitos, Cannon, Cannon, Garth & Fletcher 2007; Sudol-Szopinska, Blachowiak & Kozinski 2007) and the growing popularity of air travel means that DVT is becoming a greater medical concern, especially as the symptoms of DVT emerge only after the actual development of the condition (Arfvidsson, Eklof, Kistner, Masuda & Sato 1999; Ball 2003; Bettes & McKenas 1999; Came 2000; Cruickshank, Gorlin & Jennett 1988; Ebell 2001; Feltracco et al. 2007; Holcomb 2006; Kamphuisen & Oudkerk 2007; Lipman 2006; Low & Chan 2002; Sajid, Iftikhar, Rimple & Hamilton 2007; Scurr, Machin, Bailey-King, Mackie 2001; Sudol-Szpoinska et al. 2007; Tan, Koh & Chao 2007). Numerous writers have raised concern regarding DVT, the majority of which identify DVT as a condition caused not solely by long-distance economy class flying, but as a condition which is developed in co-morbidity with other prevailing conditions. Such conditions may include:

- age above 40 years (Bradford 2007; Kniffin, Baron, Barrett, Birkmeyer & Anderson Jr. 1994; Montagnana, Favaloro, Franchini, Guidi & Lippi 2010; Motykie, Zebala, Caprini, Lee,

Arcelus, Reyna & Cohen 2000; Nicholson et al. 2003; Tan et al. 2007), whilst Ringwald, Schifferdecker, Raemsch, Strobel and Eckstein (2011) postulate that the DVT risk is moderate for persons over 60 years of age;

- sleep apnea (Ambrosetti, Lucioni, Ageno, Conti & Neri 2004; Rebelo 2009);
- cardio-vascular diseases (Girolami, Prandoni, Simioni, Girolami, Scarano & Zanon 1995; Possick & Barry 2004);
- high blood viscosity (Motykie et al. 2000);
- the use of oral contraceptives (Ringwald et al. 2011);
- recent surgery (Girolami, Fabris & Girolami 2002; Possick & Barry 2004);
- being of short stature (Cruickshank et al. 1988).

In contrast, Bradford (2007) argues that DVT may develop even in the absence of other medical factors. Davis (2007) establishes that the importance of hospitalisation for baby boomer patients is greater than for younger people, due mainly to the reduced body mass index (BMI) and the fact that baby boomers take longer to display symptoms of DVT than their younger counterparts. DVT is not solely caused by flying (Arfvidsson et al. 1999; Arya, Barnes, Hossain, Patel & Cohen 2002; Chee & Watson 2005; Perry 2004). As age and other health factors including previous surgery may well contribute to this medical condition, especially after flights of longer than eight hours (Arfvidsson et al. 1999; Lopes, DaSilva, Bittencourt, Ronald, Ronald & Tufik 2009; Ringwald et al. 2012; Scurr et al. 2001; Sudol-Szopinska et al. 2007; Trottman 2001). In contrast to this, Bradford (2007) and Cesarone, Belcaro, Nicolaides, Ricci, Geroulakos, Ippolito, Brandolini, Vinciguerra, Dugall, Griffin, Ruffini, Acerbi, Corsi, Riordan, Stuard, Bavera, Di Renzo, Kenyon and Errichi (2003) argue that long haul flights are the major cause of DVT.

Some writers state that DVT can affect any passengers at any age, with up to half of DVT cases being under the age of 50 years (Cruickshank et al. 1988; Feltracco et al. 2007; Harrar 2003; Holcomb 2006; Hitos et al. 2007). However, Bradford (2007), Dehart (2003) and Eklof et al.

(1996) found that most travellers who were likely to develop DVT were 40 years of age and over and that DVT was mostly a risk on flights of six or more hours' duration. They found that as the length of flights increased beyond six hours, the risks of DVT rise rapidly (Philbrick et al. 2007). Arya et al. (2002), Scurr et al. (2001), Silverstein, Heit, Mohr and Petterson (1998) and Smith (2000) identified travellers above 50 years of age as being most susceptible to the development of DVT and Cruickshank et al. (1988) established that flights as short as 3 to 4 hours could produce DVT.

Whilst writers differ on the causes of DVT, the age groups most at risk, and the prevalence of the illness, there is evidence in the literature to suggest DVT will be a major concern in respect to the growing cohort of baby boomers travelling by air.

2.4.1.2 Hypobaric hypoxia

Respiratory problems alone account for 6%–11% of in-flight emergencies (Gardelof 2002; Morgan 2002). Modern aircraft cabins are pressurised to the equivalent of natural air pressure at altitudes of 5 000-8 000 feet (Abramowitz & Gertz 2007; Arfvidsson et al. 1999; Bradford 2007; Bettes & McKenas 1999; Brundrett 2001; Coker et al. 2007; Ingle et al. 2011; Johnston 2001; Mohr 2008; Perry 2040; Teichman et al. 2007). Pressurisation of aircraft to the equivalent of natural air pressures at 5 000 to 8 000 feet equates to oxygen comprising around 14% to 15% of the air, as opposed to 20% to 21% at sea level conditions (Coker et al. 2007; Cottrell 1988; Dillard, Berg, Rajagopal, Dooley & Mehm 1989; Hinninghofen & Enck 2006; Mortazavi, Eisenberg, Langleben, Ernst & Schiff 2003; Mohr 2008; Muhm 2004; Samuels 2004). These conditions may create serious health risks for baby boomer travellers.

Hypobaric hypoxia is oxygen shortage as a result of cabin pressure (Brundrett 2001; Harding & Mills 1983; Shand 2000). It is a condition in which the body is deprived of adequate oxygen in

high-altitude long-distance flying. This is associated with cabin pressures which are not adjusted to sea level conditions (Coste et al. 2007; Nicholson et al. 2003) and as such, hypoxia is a condition which is unique to air travel (Bradford 2007; Martin et al. 2007; Silverman & Gendreau 2009). Hypoxia, especially on long flights, can exacerbate the health problems of baby boomer passengers, potentially leading to further medical conditions such as pneumothorax and lung disease (Katschinski 2006; Low & Chan 2002). However, Bossley and Balfour-Lynn (2007) and Samuels (2004) found that hypoxia is more dangerous to infants under the age of one year and Shesser (1989) found that the majority of in-flight emergencies bore no relationship to hypoxic stresses of altitude.

As with DVT, multiple underlying morbidities may be prevalent in the development of hypoxia in baby boomer air travellers. Those who are at a greater risk of developing hypoxia include travellers with pulmonary diseases such as COPD (Chronic Obstructive Pulmonary Disease) as well as asthma. Such travellers may be elderly (Christensen, Ryg, Refvem, & Skjonsberg 2000; Cogo, Fischer & Schoene 2004; Edvardsen, Akerø,Hardie, Ryg, Eagan, Skjønsberg & Bakke 2011; Fischer, Lang, Brückner, Hoyer, Meyer, Griese & Huber 2005; Krige 2009; Mohr 2008; Rayman 1997; Robson & Innes 2006; Zoidis 2004). Additionally, newer aircraft are flying at higher altitudes (Brundrett 2001; Cottrell 1988) and longer distances, potentially exposing some passengers to an increased risk of developing hypobaric hypoxia. As the demographics of air travellers demonstrate rising age, the prevalence of hypoxia as a medical risk must be considered, especially on longer international flights.

2.4.1.3 Syncope

Syncope is a brief loss of consciousness and is often caused by low oxygen levels. The risk of death increases with age and the condition remains a common cause of hospitalisation (Alshekhlee, Shen, Mackall & Chelimsky 2009). Research regarding syncope in baby boomer air

travellers is exiguous, however from what has been found, the risk of syncope is greater on longer flights (Low & Chan 2002; Shesser 1989) and Delaune et al. (2003) identified syncope as the main medical condition (15%) in a study of medical episodes experienced on one particular unidentified airline. In contrast, Macleod (2008) reports that syncope accounted for 22% of in-flight episodes in 1996–1997 in the United States amongst a selection of unidentified airlines. Baby boomer travellers are at higher risk of syncope (Kenny 2003; Lipsitz 1983; Low & Chan 2002), a condition which (for the purposes of aviation) is related to hypoxia and furthermore, comorbidity in baby boomers may serve to complicate the symptoms and ultimately the diagnosis of syncope (Kenny 2003).

Syncope was the sixth-most common cause for the hospitalisation of patients over the age of 65 years in the United Kingdom in 1999 (Kenny, O'Shea & Walker 2002). Additionally, Alshekhlee et al. (2009) identify the mean age of syncope-related hospitalisations as 69 years with a 17.7 year standard deviation. As is the case with hypoxia, syncope may become a growing concern as more baby boomers travel by air and as aircraft serve to transport passengers on longer flights.

2.4.2 Airline (passenger) ground services

There is no clear internationally accepted definition of *ground handling* as far as airports are concerned, but Abeyratne (2008) establishes that ground handling may include services to and from an aircraft for arrival and departure, and to and from an airport, except for air traffic control. Thus, for the purposes of this thesis, the ground services which could most affect travellers include:

- Airport access and way-finding;
- Airline check-in procedures;

- Aircraft embarkation/disembarkation (enplaning and deplaning) processes;
- Security procedures.

Briones and Nguyen (2007, p.10) state that '*Passenger services workers perform important security functions and are the airport's ambassadors to the public. Much of a passenger's airport experience will be shaped by the services provided by checkpoint staffers, baggage porters and wheelchair attendants*'. However a major concern to the writers was the seemingly lowering of standards of service due to factors to be discussed later in this sub-section. Many airlines are now outsourcing services (such as check-in, baggage handling, aircraft servicing) to private contractors rather than use in-house operations (Abeyratne 2008). Such practices have arisen as a result of the deregulation of the civil aviation industry (Briones & Nguyen 2007; Hunter & Layton 1986). Furthermore the application of SSTs such as self-check-ins at airports is rising, necessitating less airline staffing which potentially leads to less interpersonal contact between airlines and their customers (Drennen 2011).

Caves and Pickard (2001) argue that airport experiences affect the quality of the civil aviation industry at large and numerous writers have established that airlines' airport ground services, including security procedures and associated waiting times, could be a consideration regarding the health of baby boomer passengers (Briones & Nguyen 2007; Davies 2009; Gardner 2003; Hunter & Layton 1986; Naudi 2002; Price 2006; Roman 2007; Sharkey 2003). Moreover, Prebazac et al. (2010) conjecture that because airports are the commencement point for air travellers, they create lasting impressions in the minds of travellers. Such ground experiences may be summarised as creating *airport tumult* and Rayman (1997, p.432) argues that the stresses of flight commence on the ground as travellers '*contend with crowds, lines, luggage and long walks to departure gates*'. In discussing the issues of airports in respect to baby boomer travellers, Gardner (2003) identifies the 'three Ws' of airports: walking, waiting and

way-finding. Wolfe (2003) stresses that not only can airports be anxiety provoking, but they airports can potentially deter baby boomers from travelling altogether.

In a study of the 2 500 passenger service employees working in services outsourced by airlines at Los Angeles international airport (LAX) in the United States, Briones and Nguyen (2007) found that few staff were formally qualified in their roles, including the tasks of assisting elderly passengers to enplane and deplane. Furthermore, they found that equipment problems and understaffing were contributing to reduced service quality at LAX. They found that part of the problem was that due to fierce competition, airlines were unwilling to share facilities and services in the various terminals of the airport.

Ongoing deregulation and increasing competition in the Australian aviation industry could potentially and indirectly lead to the exacerbation of the health of baby boomer travellers attempting to negotiate their ways through the nation's airports, which as discussed in the background literature, are increasingly busy.

2.4.2.1 Airport location and layout/design

As populations increase and the civil aviation industry grows, congestion at airports rises and the need for new airports grows (Barrett 2004; Cidell 2003; Harrison 2004; Min 1994; Rose, Bjornstad & Packard 2008; Snowdon, El-Taji, Montevecchi, MacNair, Callery & Miller 1998; Tien & Sconfeld 2007; Wolfe 2003). The location of airports and access to them, particularly with respects to LCCs (Blackstone, Buck & Hakim 2006; Fournier, Hartmann & Zuehlke 2005; Pels, Nijkamp & Rietveld 2000; Price 2006) could mean that baby boomer travellers are required to make greater efforts to access airports, especially as the growth of civil aviation and associated deregulation is bringing about air traffic congestion (de Neufville 2007; Hamzawi 1992; Mazzeo 2003) and increasing delays (Howarth & O'Toole 2005) coupled with the impracticalities of

expanding established airports (Tien & Schonfeld 2007), requiring airlines to seek alternative airports. Alternative airports may be located away from city areas as opposed to congested airports which may be located in close proximity to cities (Mikio 2012).

Furthermore, citing the significance of airport charges, Flouris and Walker (2005) stipulate that the LCC airline model requires the prevalence of low cost structures and that established airports may not be able to meet the demands of newer airlines as deregulation increases (Burghouwt 2007). In Australia, this could mean, for example, Jetstar's current use of Avalon airport in Melbourne in addition to Tullamarine and the proposed use of either Bankstown or Richmond airports in metropolitan Sydney, as opposed to Mascot. Russon and Riley (1993) find that in short haul markets (e.g. Sydney-Melbourne, Sydney-Gold Coast, Sydney-Brisbane) airport substitutability may determine passenger flows. Of concern to the Australian civil aviation industry is Sydney International Airport, which may not be able to cope with the future growth in demand (Driml et al. 2010).

LCCs have a tendency to offer cheaper airfares for the use of alternative airports, with the payoff being the requirement that travellers must make a greater effort (usually travelling longer distances) to access such airports – including increased travel time to and from city centres (Barrett 2004; Fournier et al. 2005). Due to lower congestion at these alternative airports, aircraft may be delayed less often than they are at more established airports (Howarth & O'Toole 2005). However, it is not only airlines who offer financial incentives to travellers. Airports themselves may offer savings to airlines who in turn pass those savings on to consumers (Tien & Schonfeld 2007), a process which can increase sales due to the elasticity of the civil aviation industry (Rubin & Joy 2005). Tollén and Frålund (2010) postulate that the increased traffic at regional and secondary airports is serving to cannibalise established airports.

Though proximity to the traveller's place of residence may be an important aspect of airport choice, Hess (2010) identified a perception amongst travellers that larger airports are better at handling mishaps (such as flight delays and congestion) than are smaller airports even though travellers did express concerns about larger business airports in general. However, Hunter and Layton (1986) found that access at some airports was difficult for elderly travellers and Wolfe (2003) argues that the ability of airports to serve the requirements of baby boomer travellers may affect their propensity to travel through airports in the future, a view shared by Caves and Pickard (2001) who state that the perceived quality of the civil aviation industry may be dependent on ground experiences of travellers. Additionally, Barrett (2004) found that newer airports can be of benefit to passengers in terms of short walking distances within terminals, shorter waiting times, less confusion and quicker baggage delivery (overall 'simplicity of operations') and Rubin and Joy (2005) state that reliance on hub airports can mean that external interruptions can negatively affect an airline's overall operations. Whilst discussing the benefits of such airports, Barrett (2004) and de Neufville (2007) stress the importance of fast-food outlets in view of the absence of catering on LCC flights.

In studying airport designs and layout, Wolfe (2003) argues that airports are confusing for baby boomer travellers and (airports' management) need to position themselves better for the growing baby boomer market. Additionally, Caves and Pickard (2001) state that way-finding is one of the strongest tests of a building's ability to satisfy primary passenger requirements and according to Fewings (2001) many airports are confusing and poorly designed. Further to this de Neufville (2007) argues that poorly designed airports are likely to lose passengers and Mikuli and Prebežac (2009) conclude that airport experience is a loyalty driver which may be influential in choice of airlines.

2.4.2.2 Airline check-in procedures

As discussed in the previous subsection, way finding is an emerging problem at airports, some of which are poorly designed. The step after arriving to the airport of departure and subsequently finding the check-in area is to commence check-in procedures and several writers have commented on the growing number of complaints made by travellers regarding long queues and congestion at airline check-ins and security points (Edwards 2005). These writers point out that check-in processes could influence passengers' perceptions of airline service quality (Müller & Gosling 1991). Furthermore, passengers' satisfaction in the civil aviation industry as a whole may also be affected (Caves & Pickard 2001). In contrast, the prevalence of SSTs at airports for the purpose of flight check-in is rising globally, enabling users to have some control of their travel (Drennen 2011).

However many travellers may be resistant to using SSTs (Lu, Chou & Ling 2009) and it becomes important for an organisation's employees to encourage consumers to use such technology and be at hand to assist (Cho & Fioriti 2010) and to develop an understanding of user requirements and intentions prior to installing the machines (Chang & Yang 2008; Lu et al. 2009) as the installation of SSTs does not necessarily ensure positive outcomes for users (Cho & Fioriti 2010) partly because SSTs reduce personal contact between airlines and their customers. In a study of the prevalence and usage of ATMs (automated teller machines) in the banking industry Prendergast and Marr (1994) argue that many consumers abandon SSTs, instead reverting to human interaction. This is supported in a study of the demographics of SST users by Dean (2008) who found that baby boomer consumers (over 49 years of age) were less confident using technology and preferred human interaction. Finally, Chang and Yang (2008) stress the importance of self-check-in kiosks being located close to baggage drop-off locations.

2.4.2.3 Aircraft embarkation/disembarkation

The boarding of passengers at airports has become less efficient over the last 30 years and (as of 2008) there is a paucity of research into reducing the costs of this important airport process (Nyquist & McFadden 2008). Further to the issues inside terminal buildings, Roman (2007) discusses the on-board procedures during flight preparations and goes to the extent of envisaging totally redesigned aircraft and airport buildings in which the multiple doors of the aircrafts are utilised for boarding/disembarkation of travellers.

2.4.3 Aviation security

Terrorist acts (such as September 11, 2001) have altered the way aviation security (airports and aircrafts) is operated. Furthermore, security procedures have accordingly been toughened and newer scanning devices employing various technologies have been introduced to airports worldwide (Briones & Nguyen 2007; Cidell 2003; Daly 2010; DeHart 2003; Ercegovac 2009; Garrick 2004; Kornblatt 2007; Parks 2007; Salter 2007; Sharkey 2003; Tsacoumis 1983; Whelan & Palmer 2006; Wilson 2007; Wolfe 2003; Xiaofeng, Batta, Drury & Li 2009). Furthermore, Gkritza et al. (2006) argue that security processes at airports must be to the liking of travellers and that meeting traveller tastes is an important determinant of airlines' financial viability.

Sky marshalls are not a new introduction to the civil aviation industry (Boltwood, Cooper, Fein & Washburn 1972) and although the threats of terrorism prevail and although there have been many instances of attacks being foiled by airport authorities around the world (Petrou 2010), aviation security continues to be a major issue for airlines as both the industry and governments take strict measures to secure the safety of aircrafts and passengers.

Baby boomer travellers are generally more concerned about safety and security than younger travellers (Muller & O'Cass 2001; Schewe 1990) and it is important that security procedures are as unintrusive as possible (Correia, Wirasinghe & de Barros 2008; Wolfe 2003). As newer security procedures and devices are introduced by airports and airlines, passengers (especially baby boomer travellers) may become increasingly affected due to issues such as wait times and security processes. Regarding this, Blalock, Kadiyali and Simon (2007) argue that increased aviation security measures have inconvenienced travellers and that the use of roads as an alternative to air travel leads to increased (road) fatalities. Moreover Daly (2010) discusses the growing lack of personal autonomy in regard to airport security, where biometric data is shared increasingly between airlines and government security agencies. Kornblatt (2007) further argues that it is becoming increasingly important that a balance be established between prudence and respect of traveller privacy.

Baby boomer passengers have been the centre of more scrutiny at some airports due to factors such as the carrying of heavier cabin bags as a result of checked baggage restrictions (Price 2006) and in calling for more consideration of passenger risk, Yildiz, Abraham, Panetta and Agaian (2008), stress the importance of major changes to airport procedures, namely the reduction of layers of security screening, in favour of baby boomer (and physically impaired) travellers as air travel increases. The explosive detection system (EDS) proposed by Yildiz et al. (2008) would minimise requirements for shoe removals as opposed to the current *tip ready X-ray* (TRX) scanners. Mahesh (2010) found that various body scanning devices could affect the health of certain people, particularly those with x-ray sensitivity and that radiation levels may be such that some passengers may be intolerant of their doses. A further problem raised by Briones and Nguyen (2007) is that due to cost-cutting and competition, some airlines are using low-bid systems to outsource security services, which could lead to airports being attractive terrorist targets. Finally, Wolfe (2003) suggests a requirement for more seating around airport

security areas for the comfort of baby boomer air travellers as they await ushering through to aircraft.

2.4.4 In-flight comfort

In a study on domestic Australian airline brand image and future consumer behaviour, Park et al. (2006) found a correlation between traveller in-flight service satisfaction and future repurchase intentions. Their study also stressed the importance of managements' understanding of individual service dimensions. This is supported by Clemes et al. (2008) who include comfort as a sub-dimension of service quality which when coupled with price serves to influence customer satisfaction and hence repurchase intentions, a finding supported by Vink and van Mastrigt (2011) who report that comfort factors influence repurchase.

Suggesting that airlines should offer food and drink to all passengers Moufakkir (2010) argues that with the implementation of pay-for-food-and-drink policies, airlines have become crammed flying shop/bars and restaurants, further stating that such policies are making on-board conditions busier and reducing the comfort of passengers. A question of discrimination arises when crews render more service to some passengers than others. Moreover, as the cohort of baby boomer travellers grows, cabin design and layout must be addressed (Ehrenmam 2005). Finally Vink et al. (2012), report that travellers rate the newer aircrafts as being more comfortable and emphasise the importance of legroom as an influencing factor for flight experience.

2.4.4.1 Economy (coach) class crampness

Seating (additional to the medical concerns regarding DVT, see 2.4.1.1) in economy class cabins is another issue as cramped conditions may hamper evacuation procedures, prevent the

adoption of crash posture and prevent travellers from following airline recommendations for movement during long flights to avoid medical complications such as DVT (Brundrett 2001; Trottman 2001). Cramped seating, in addition to medical episodes such as DVT, may also reduce traveller satisfaction (Brundrett 2001; Fiorino 1999) and Galili and Bass (2002) conclude that airlines should consider providing more leg room between seat rows on aircraft. However, Lee and Luengo-Prado (2004) caution that leisure travellers (no suggestion in regard to age demographics) may not be willing to spend higher tariffs on premium economy travel, even if they are aware of the greater seat pitches available. Supported by Kuchta (2007) and Mason (2002), Lee and Luengo-Prado (2004) confirm that premium economy class is more attractive to business travellers. Further to this, Nadadur and Parkinson (2009, p.1) stress the importance of *human variability* with respect to the target population and Ehrenmam (2005) warns of the task which aircraft design engineers face in order to remain abreast of the requirements of the baby boomer generation. In contrast, Vink and van Mastrigt (2011) argue that aircraft manufacturers have in recent years improved aircraft seating comfort.

2.4.4.2 Safety and emergency procedures

Poria, Reichel and Brandt (2010, p. 216), citing the works of several writers (and discussing travellers with disabilities), point out the importance of considering the effect which baby boomer travellers will have the on the future of the aviation industry, as they (the baby boomers) '*become part of the elderly population*'. Additionally, Ringle et al. (2011) stipulate that the perceived safety of an airline is a major driver of overall customer satisfaction and ultimately, customer loyalty.

Evacuation procedures require that with the application of 50% of the available emergency exits of an aircraft, all passengers can be evacuated within 90 seconds (Fewings 1994) and there is evidence that many passengers may not render ample attention to the printed safety

information placed in aircraft seat pockets or the safety demonstrations presented by cabin crews prior to take-off (Muir & Thomas 2004). Walker and Craig-Lees (1998) argue that as people age, their ability to learn new tasks and process information decreases and they may experience changes in their ability to control and utilise their personal space (Webb & Weber 2003).

2.4.5 Destination selection

When considering destination marketing and planning, consideration of the ages of travellers is important (Gitelson & Kerstetter 1990; Glover & Prideaux 2009; Plog 2006) especially as the array of tourist destination choices has increased in the last few decades and continues to increase (Button & Drexler 2006; Nordin 2005; Roubik 2002). Nordin (2005, p.23) further stresses the importance of tourism organisations maintaining knowledge of the baby boomer markets so that the knowledge of such requirements may be '*translated into viable products, services and methods*'. Ahmed (1991, quoted by Kozak & Rimmington 2000, p.2) stresses that '*tourist perceptions are important to successful destination marketing because they influence the choice of a destination*'. Some examples of destination factors presented by writers and researchers are:

- Littrell, Paige and Song (2004) who found that baby boomer travellers (over 50) enjoy shopping at destinations.
- Plog (2006, p.47) quoted the American Traveller Survey (ATS) as stating that 49% of the over 65 travellers surveyed in 1997 preferred newer destinations when travelling. Tsiotsou and Ratten (2010) emphasise the importance of tourism organisations focusing their marketing efforts at the consumer.
- Nordin (2005) discusses health tourism as being an important interest for baby boomer travellers in their quest to feel younger. She also discusses the baby boomer generation's

liking of outdoor activity. Health tourism amongst the baby boomers is also discussed by Hudson (2010).

- Hyde (2008) states from observation that baby boomer travellers generally plan their holidays in more detail than their younger counterparts.
- Boksberger and Laesser (2009), Hudson (2010) and Patterson (2008) state that baby boomer travellers are nowadays seeking more youthful experiences due to factors such as increased wealth. Furthermore, they cite that due to rapid socio-economic developments (and under varying societal circumstances), each generation experiences its own age and travel experiences and that baby boomer travellers are seeking more youthful experiences.
- Muller and O'Cass (2001) when discussing the distinction between actual and subjective ages, argue that baby boomer travellers can feel a decade younger than their true ages. They found that young-at-heart seniors preferred island, mountain and outback holidays in which they would seek '*fun and enjoyment in life*' as that they '*obtain physical stimulation, excitement and invigoration*' (Muller & O'Cass 2001, p.296). Those seniors who were more inclined to be closer to their actual ages were inclined to prefer city and outback holidays with more focus on social/people settings rather than on nature. Supporting this, Reisenwitz and Iyer (2007) caution against segmentation between baby boomer cohorts (e.g. splitting baby boomer consumers in to younger and older segments such as those born 1946-1955 and 1955-1964).

Furthermore, care must be taken to consider the availability of adequate medical facilities at destinations, should medical episodes which require hospitalisation, arise (Gezairy 2002; Shand 2000; Teichman et al. 2007; Wilde, Roselieb, Hanvesakul, Phaosavasdi & Pruksapong 2003).

2.4.6 Baby boomer travellers and customer service/communication

Service organisations are increasingly required to deal with an ageing cohort of consumers as the population ages (Walker & Craig-Lees 1998). Furthermore, and in direct respect to air travellers, as ageing takes place amongst a growing cohort of airline travellers, the importance of customer service and the communication skills of airline staff (particularly ground staff and air crews) should be addressed as customer satisfaction is an indicator of repeat business (e.g. Prabhu 1996; Vink & van Mastrigt 2011).

Baby boomers seek memorable travel experiences and customised services (Hudson 2010) and Karmarkar (2004) stresses the importance of committing time and financial resources with the aim of achieving better understanding of the requirements of customers. Additionally, Deloitte Research (2007) discusses the growing importance of customer-oriented businesses to align the needs and service preferences of customers according to various age groups. Supporting this, Sambath (2008) stresses the importance of efficient and friendly customer service to baby boomers.

As airlines operate under market forces which demand lower airfares, they struggle to maintain customer service levels (NZTRI 2009). However it is crucial that service organisations realise that the human element plays an important role in achieving service quality (Walker & Craig-Lees 1998) and airlines can gain greater understanding and awareness of customer needs and wants through wider communication channels (Atal et al. 2009).

Whilst the use of information technology (IT) on the part of consumers is on the rise in many service industries including travel/tourism, and whilst it can benefit consumers and service providers alike, Walker and Craig-Lees (1998) warn that technology can impersonalise the relationship between service providers and consumers. According to the authors this may

emerge as a result of a lack of ability on the part of the consumer to utilise the technology (as baby boomers possess less ability to learn new tasks and process information) and as a result of the potential for the technology to malfunction, leaving the consumer isolated and forced to deal with technology rather than humans. Moreover, at times of dissatisfaction with services, customers might not necessarily complain and Jones, McCleary and Lepisto (2002) in their study of hospitality service customers found that baby boomer customers were less likely to complain than other age demographics. This may make it difficult to identify and isolate customer service flaws.

In respect to travel and tourism, the concerns raised by Walker and Craig-Lees (1998) could apply in two areas of operation: on-line bookings and airport check-ins. Airline staff (both air and ground) must be familiar with the requirements of baby boomer travellers and the associated communication skills which may be required to deal with this growing cohort. Atal et al. (2009) argue the importance of increased staff training and value added services for the purpose of improving customer loyalty.

2.4.7 Immediate literature: Data propositions

It is expected that medical issues pertinent to baby boomer air travellers will surface in this research. These may include (but not be limited to) diseases such as DVT as well as mobility concerns and metallic implants such as artificial limbs and their implications for security procedures at airports. It is further anticipated that the participants in this research will discuss processes and procedures conducted by airlines at airports, such as check-in, customer service, aircraft access and wheelchair facilities. These themes may further pertain to airports' infrastructures, aircraft access, airport locations and the mobility of baby boomer travellers around airport buildings.

In addition to the expected discussions pertaining to customer service at check-ins, it is anticipated that the participants of this research may raise concerns regarding the growing prevalence of IT services in which airlines are offering on-line check-ins. Participants may express concern about IT services which may be perceived as non-user-friendly. As with the literature, there may be some conjecture amongst participants in regard to the abilities of baby boomers to utilise IT to this effect.

Data regarding security procedures and protocols at airports is expected to emerge as an issue. Participants may raise concerns in regards to baby boomer travellers' tolerance of such procedures, including the prevalence of artificial limbs which may cause considerable inconvenience to travellers.

Comfort is expected to be a major concern to many participants. It is envisaged participants will raise concerns with regard to cramped conditions in aircraft, development of DVT, in-flight catering and in-cabin movements by travellers. Comfort concerns may also lead to the mention of premium economy class as an alternative for more affluent baby boomer travellers.

2.4.8 Immediate literature summary

The immediate literature has unearthed a labyrinth of concerns from writers and researchers with regard to the tourism industries (including airlines) meeting the requirements of baby boomer travellers. It has revealed that it is important for airlines to consider (i) the growing propensity for baby boomers to travel and (ii) the ability of baby boomers to actually travel. These considerations determine the changes that will need to be implemented in civil aviation organisations, in order to maintain (and grow) loyal clientele. To save duplication, a summary table is not presented here. However in Chapter 5, I compare the results of this research with the immediate literature above and tabulate some of the results.

2.5 Literature summary and further research

Having discussed the background, parent and immediate literature related to the research question and topics at hand, it may be summarised that baby boomers:

- Are growing in terms of their proportion of the Australian population;
- Are becoming a major cohort of tourists and thus air travellers;
- Will become a major cohort of air travellers whose unique requirements will need to be catered for in order for the airlines to secure repeat business.

The requirements of baby boomer travellers (in the air and in airports) could be classed as follows:

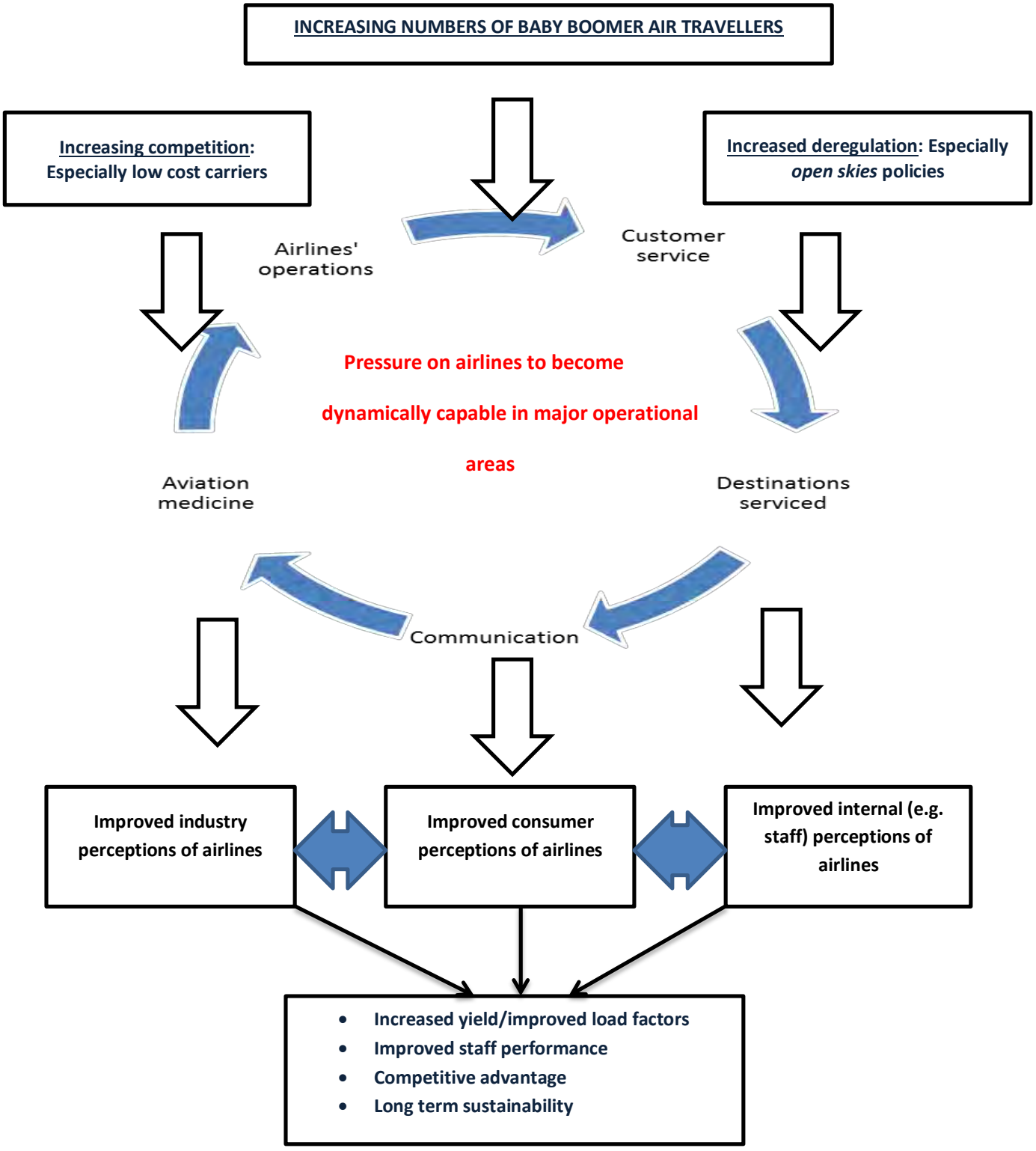
- Physiological: easier access to and at airports, minimal 'airport tumult', best possible in-flight comfort, access to effective medical attention;
- Psychological: effective communication (on the part of airline staff), sense of personal security, recognition of loyalty, recognition of destination requirements.

This thesis will further research the perceptions of tourism stakeholders with regard to the readiness of the civil aviation industry to handle the increasing number of baby boomers flying. The immediate literature raises numerous themes which may apply to baby boomer consumers travelling by air. The parent literature field of choice, dynamic capabilities, relates to how ready airlines are for this. There are many sub-areas which could be researched as this is a relatively new sub-field. This thesis is very early exploratory research into the perceptions of a wide range of Australian tourism industry stakeholders who should have an opinion or knowledge concerning airlines. The core research theme chosen from the above study is:

"*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"?

This core research theme is depicted in the following diagram (Figure 2.9 over page).

Figure 2.9: Concept model



Source: Developed for this research

2.6 Research domain

Whilst BITRE and the TRA have presented quite optimistic outlooks in terms of forecast growth in Australian aviation as well as tourism patterns (despite the 2010–11 downturns), the question of awareness of ageing travellers issues in the civil aviation industry is the focus of this thesis. Information on the age of travellers could prove crucial for future marketing strategies on the part of airlines as they strive to compete with each other. A greater understanding of gerontology would also be required lest the airlines fail to meet specific consumer demands as the baby boomer generation ages.

This thesis addresses the question "*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"?

2.7 Conclusion

This chapter explored the background, parent and immediate literature pertinent to the research theme of "*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"?

First the background literature identified and discussed some of the major stakeholders of the Australian tourism industries, including the airlines and baby boomer travellers. This was followed by the parent literature in which dynamic capabilities as a sub-field of strategic management was selected as a lens to interpret the research results. Finally, the immediate literature identified a number of themes pertinent to airlines' operations which may affect baby boomer travellers, should their numbers as travellers continue increasing.

Chapter 3 discusses and justifies the research methodology and examines positivist (inductivist-deductivist) research, in-depth interviewing and qualitative research in general as the preferred methods for addressing the research questions posed in this research.

CHAPTER 3

RESEARCH METHODOLOGY

3.1 Introduction and structure of Chapter 3

Chapter 2 reviewed and discussed the parent, background and immediate literature pertinent with this thesis. It identified a paucity of literature on the broad perceptions of Australian tourism sector stakeholders in regard to the readiness of the airlines to handle the growing number of baby boomer air travellers on airlines within and to/from Australia. The initial research questions were designed solely to research airlines, and the researcher intended to interview one or two airline executives from each of the operations and/or staff in the marketing departments of each airline (i.e. one or two participants from each participating airline). Despite considerable attempts to gain their involvement, this foundered due to the limited number of airline executives who agreed to partake in the research. It was originally hoped that between 10 and 12 airlines, with a total of 20 to 24 participants, would partake in the research. Data collection for the purposes of the originally planned research commenced in July 2010 and by the conclusion of August 2010, only three airlines had agreed to participate. It was obvious that a reasonable sample size of participants ample for a qualitative doctoral thesis would not be obtained. Therefore the sample and emphasis of the study was amended to include a broader group of stakeholders from the Australian tourism industry (see section 3.4.1).

As it is important to recognise the attempts made to acquire responses from the airlines' executives, Appendix 4 is a brief chronological summary of the airlines approached. The amended research questions were such that a broad spectrum of participants from various Australian tourism industries stakeholder categories would be included in the research. Instead, it was decided to concentrate on a range of stakeholders' views, rather than those of the

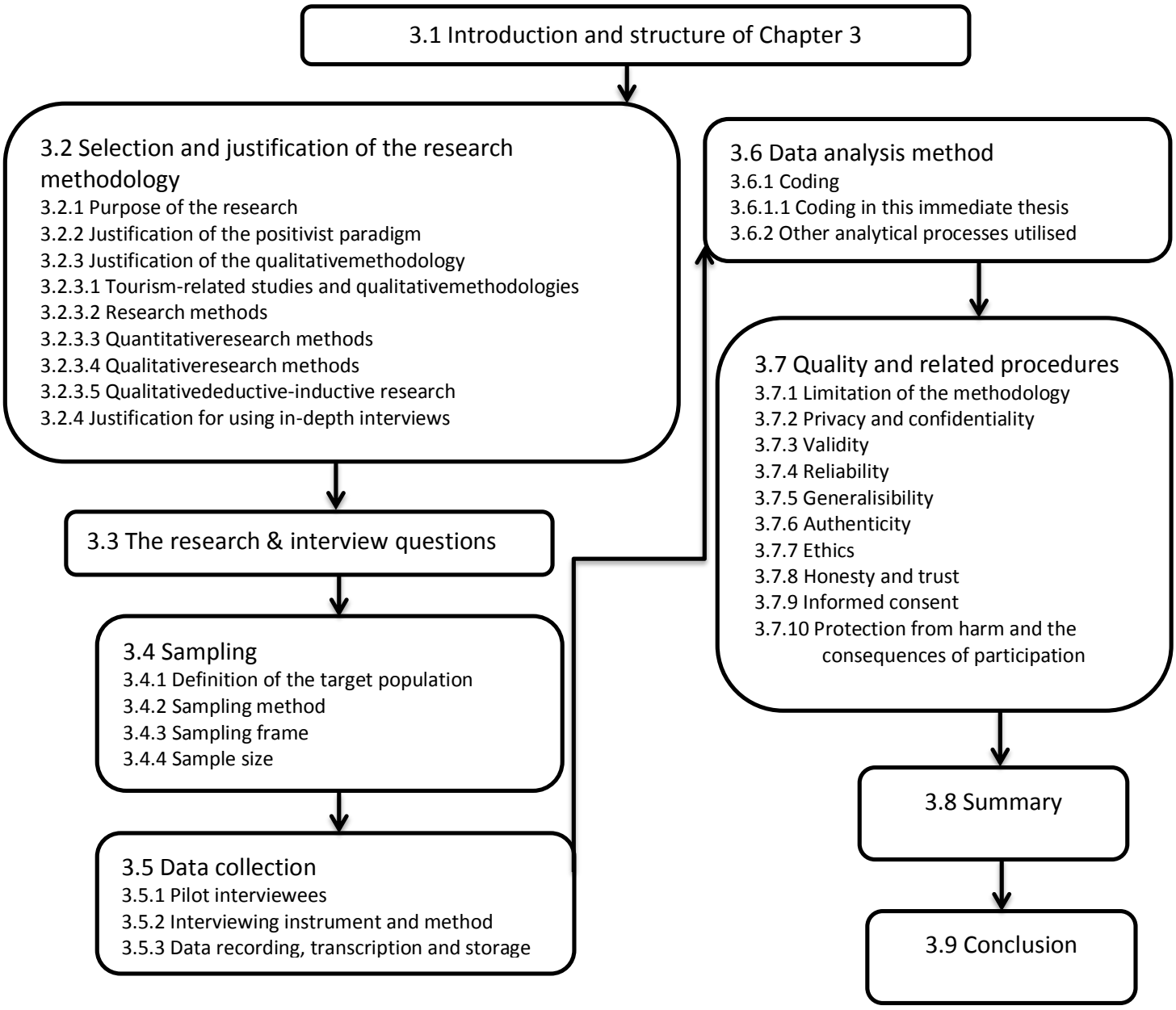
airlines. The participants were selected from segments of the Australian tourism industries (as identified by researchers such as Leiper 2008). Thus the participants were selected because:

- It was deemed that the number of airline executives (*n*=3) who were willing to partake in the initially planned research was not ample, and therefore a broader participant base was required;
- The literature indicated enduring arguments that tourism was indeed a loosely segmented set of interacting industries and not one rigid industry in its own right (e.g. Driml et al. 2010; Goodenough & Page 1993; Leiper 2008; Sinclair 1998; Williams & Jantarat 1998); and
- It was deemed that since multiple stakeholders were to be interviewed in the search for industry-wide perceptions, baby boomer air travellers should also be included.

Participant sampling is further discussed in Section 3.4.The research across the range of industry stakeholders required in-depth exploratory understandings of their personal perceptions, in addition to those of baby boomer travellers. Thus, a qualitative deductive-inductive methodology for aggregating and analysing data utilising in-depth semi-structured interviews was employed, as the questions applied could not be quantified by numerical measurement or analysis, especially given that (as will be discussed later in this chapter) the number of participants was typical of qualitative research.

Chapter 3 justifies the research methodology, examining qualitative deductive-inductive reasoning, in-depth interviewing and qualitative research in general as the preferred methods for addressing the research questions.

Figure 3.1: Structure of chapter 3



Source: Developed for this research

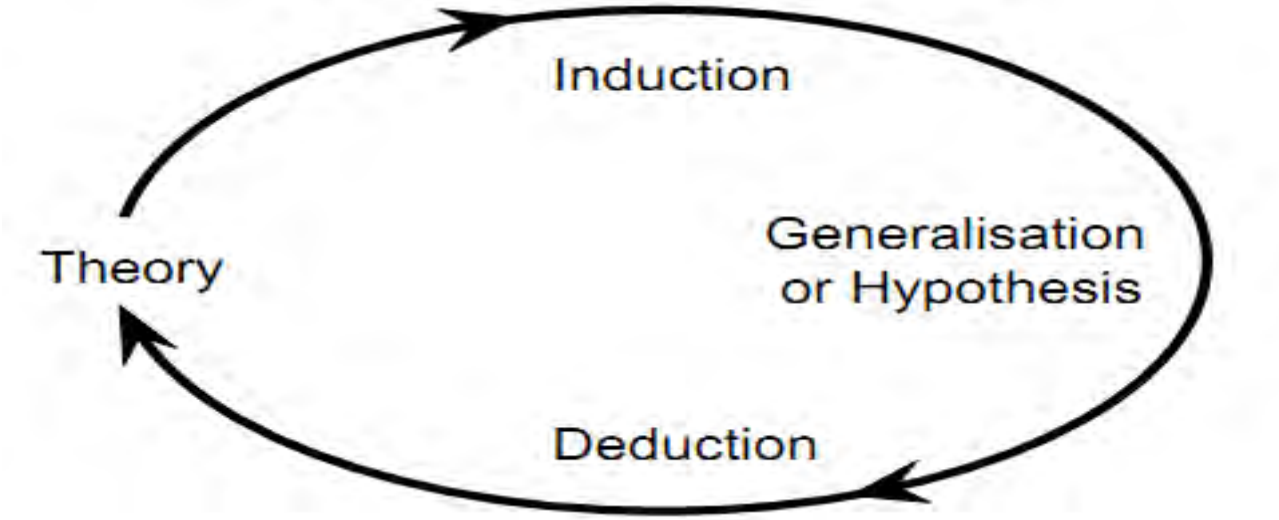
3.2 Selection and justification of the research methodology

Neuman (2006, p.2) states that methodology is '… *understanding the social-organisational context, philosophical assumptions, ethical principles and political issues of the enterprise of social researchers who use methods*'. He further states that though there is a distinction between methodology and actual methods, the two are interdependent and closely linked. Goldwin (2002) postulates that methodology is the question of '*how do we know the world or gain knowledge of it*' (p. 67). Caelli et al. (2008) emphasise the importance of distinguishing between methods and methodology. However, at the opposite end of the continuum the authors do point out the importance of avoiding *methodolatry* in which researchers become preoccupied with the process of selecting and defending methods, which potentially may lead to incommensurate attention on actual research findings. Welford, Murphy and Casey (2012) caution that the abundance of paradigms and methodologies available to researchers, as well as confusion in terminologies, may cause confusion for researchers.

Traditionally, qualitative research has been applied using inductive processes in which '*the researcher's goal is to expand and generalise theories, not to establish the frequency with which a phenomenon is likely to occur in a population*' (Hyde 2000, p. 84). Hyde (2000) stresses that the results of qualitative research generally survive untested due to the inductive nature of the research and postulates that '*introducing formal deductive procedures into qualitative research can represent an important step towards assuring conviction in qualitative research findings*' (Hyde 2000, p. 84). Patton 1991 (quoted in Hyde 2000, pp. 84-85) and Söderlund and Wärnelid (2008) argue that both deductive and inductive processes may be applied in qualitative research. In this thesis, the principles of qualitative positivist deductive-inductive research were applied in an attempt to obtain the perceptions of various Australian tourism sector stakeholders with regard to the readiness of the airlines to handle the growing number of baby boomers flying, to, from and within Australia. The expected findings established in the

literature review will be tested against the actual findings extracted after the coding of the narratives of the 32 participants of this research, a process in which the observed phenomena are validated '*when its discoveries are confirmed by experience*' (Amigoni, Schiaffonati & Somalvico 1999, p. 7). Diagram 3.1, adopted from Kelly (2004), depicts the process of induction-deduction in research. There will be further discussion of the inductive-deductive research method in Section 3.2.3.5.

Diagram 3.1: The induction-deduction cycle



Source: Kelly (2004)

In-depth semi-structured interviewing with set questions was used in this thesis. The main purposes of this approach are:

1) To avoid being caught in *methodolatry* (as discussed by Caelli et al. 2008);
2) To permit a free flow of data collection, analysis as well as (later) coding;
3) To permit the expected outcomes of this research to be tested against the actual outcomes by inductive-deductive reasoning;
4) To gain an in-depth understanding of the essences behind the experiences of various participants.

3.2.1 Purpose of the research

As discussed in the introduction, the literature review (Chapter 2) identified a paucity of literature on the broad perceptions of Australian tourism sector stakeholders in regard to the readiness of airlines to handle the growing number of baby boomer travellers flying on airlines within and to/from Australia. This current thesis aims to:

- ***Research (with in-depth interviewing as the data-collection method) the perceptions of various Australian tourism sector stakeholders regarding the readiness of airlines operating to/from and within Australia, to handle the growing number of baby boomer travellers flying;***

- ***Codify, analyse, summarise and discuss those perceptions;***

- ***Compare the perceptions uncovered in the research data to existing academic literature in Chapter 2;***

- ***Test the data against the anticipated findings discussed in Chapter 2;***

- ***Interpret the perceived preparedness through the parent literature of dynamic capabilities as a sub-field of strategic management;***

- ***Draw some conclusions of benefit to further research work or the tourism industries.***

3.2.2 Justification of the positivist paradigm

Mankelow (2003) states that research methodology is a reflection of the nature of the research problem, ontology and epistemology. Ontology refers to the researcher's perception in regard to the form and nature of reality and consideration of being (Goodwin 2009; Mankelow 2003; Mason 2002, quoted in von Bruun-Riegels 2011; Packer & Goicoechea 2000). Epistemology refers to the relationship between the researcher and the researched (Duberley et al. 2012; Goodwin 2009; Johnstone 2004; Mankelow 2003; Shah & Corley 2006). Epistemologically, the qualitative and quantitative paradigms are extricated as either interpretivism or positivism (Golafshani 2003; Johnstone 2004; Rolfe 2006; Rowlands 2005). Lin (1998) contrasts these assertions by emphasising that qualitative research encompasses both the positivist and interpretivist research traditions and furthermore, argues that '*positivist work seeks to identify qualitative data with propositions that can then be tested or identified in other cases'* (p. 162).

Positivist research may serve to '*find strategic patterns that hold across different venues with different actors*' (Lin 1998, p. 162), in which theory may be tested in an attempt to understand phenomena (Myers 1997). In this research, the actual outcomes of the research (the data coded from the narratives given by the participants of the research) will be tested against the anticipated outcomes identified in the literature review (Chapter 2).

3.2.3 Justification of the qualitative methodology

Snape and Spencer (2003) argue that there are circumstances in which areas of research may necessitate qualitative-only research methods and in these situations the application of mixed-methods utilising elements of quantitative research may not be apposite. Such circumstances (which are congruent with the current thesis) include:

- Ill-defined phenomena, such as situations where previous knowledge has not been fully understood or explained.
- Deeply rooted phenomena, in which the personal knowledge of the participant is to be studied for the researcher to gain an understanding of the phenomena.
- Complex phenomena.

The authors further state that the choice of method may depend on the aims of the research. Shah and Corley (2006, p.1821) support this by stating that '*Theory building often requires the rich knowledge that only qualitative methods can provide*'. Morse and Richards (2002) stress the importance of qualitative researchers remaining open to using various methods lest the researchers '*shoehorn*' themselves into particular methods which can lead to constraints such as the limitations discussed by Caelli et al. (2008) and cited in Section 3.2. Finally, Lacity and Janson (1994) argue that qualitative research may be applied regardless of the paradigmic position of the researcher.

3.2.3.1 Tourism-related studies and qualitative methodologies

Because this thesis concentrates on a tourism-related field, some of the issues facing tourism as a field of academic study will be discussed as well the application of qualitative research to tourism study in general. Pernecky and Jamal (2010) state that qualitative approaches are appropriate in tourism-related studies due to phenomenology's ability to describe and understand the experiential and lived experiences of subjects, such as tourists, tourist hosts and other stakeholders in tourism. They along with Jennings (2005) further discuss the growing use of phenomenology in tourism research and Cohen (1988), Davies (2003), Jennings (2005) and Walle (1997) assert that the most effective tourism works have been those which have employed loose qualitative methodologies.

The disciplines which impact tourism studies are multifarious and incorporate fields such as economics, marketing, geography and business studies (Echtner & Jamal 1997; Jovicic 1993). This, the authors argue causes a dilemma for the researcher in the consideration of appropriate methodological approaches to tourism studies, in which the methods aligned to tourism-related research are dependent upon the discipline(s) which researchers are using. Another example is Riley and Love (2000) who found that most tourism articles published in major tourism journals were quantitative in approach due to the fact that the tourism industries are economically driven and therefore require quantification.

Whilst quantitative methods have been applied in tourism research in the past (e.g. Echtner & Jamal 1997; Nyaupane & Poudel 2012; Riley & Love 2000), qualitative research is quite appropriate and well suited for tourism related fields of study (Davies 2003; Jennings 2005; Nyaupane & Poudel 2012; Walle 1997) especially given that tourism as a relatively novel field of research (Sedgley et al. 2011) involves a plethora of topics and themes, yet to be understood (Mason, Augustyn & Seakhoa-King 2010). Specifically targeting the field of tourism in his studies, Decrop (2004) highlights the importance of establishing the trustworthiness of qualitative research. Research in the field of civil aviation management has used many qualitative methods, just as tourism has – for example Bamford and Xystouri (2005). Other studies of airlines' management such as Saele (2007) have used mixed-method approaches. Moreover, and in regard to generational studies in which protracted understandings of baby boomer air travellers' requirements are sought, Sedgley et al. (2011) highlight the importance of more research *with* older people rather than research *on* them, further arguing that quantitative research tends to ignore the voices of older travellers (however, Sedgley et al. 2011 don't specify age groups).

This thesis does not aim to explicate the economic effects (positive or otherwise) of a growing number of baby boomers travelling by air, however it could serve use as an exploratory

research requiring quantitative methods to serve such a quantitative approach in the future. This thesis employs a qualitative positivist research methodology in which data collection is purely narrative (textual).

3.2.3.2 Research methods

There are two major approaches to academic research, qualitative or quantitative (Hancock 2002; Wilmot 2005) and the choice of either qualitative or quantitative methods is dependent on the nature of the study to be conducted. The two approaches serve different research purposes in different ways to achieve disparate effects (Becker 1996; Lee 1992). Bock and Sergeant (2002) and Wilmot (2005) further stress the need for the researcher to understand the objectives of the research before choosing their approach. Quantitative research involves the collection of numerical data whilst qualitative research denotes the collection of textual data (Golafshani 2003; Lee 1992; Rolfe 2006). Williams (2011) posits a third methodology; that of mixed methods research in which the weaknesses of quantitative and qualitative research are reduced (Onwuegbuzie 2004, quoted in Welford et al. 2010, p. 32).

The plethora of research designs available potentially render a challenge to the novice researcher (Groenewald 2004) and the selection of an appropriate design must be consistent with the goals of the research (Johnson & Harris 2002; Marshall 1996; Morse & Richards 2002; Travis 1999). To this end, Scandura and Williams (2000, p. 1248) state that '*The impact of management studies depends upon the appropriateness and rigour of the research methods chosen*' and as research is never flawless, McGrath (1981) discusses the importance of selecting the most appropriate method of research. Accordingly, prior to describing the method, consideration is given to the ontological and epistemological approaches (Becker 1996), followed by an analysis of the various kinds of qualitative and quantitative research designs. Mason et al. (2010) postulate that due to the relative nascence of tourism as field of academic research, there is a paucity of studies in

regard to the most appropriate qualitative exploratory study types. Table 3.1 is a brief explication of the differences between quantitative and qualitative research, as illustrated by Lee (1992):

Table 3.1: Quantitative and qualitative research explication

	Quantitative	Qualitative
Ontological assumption	Objectivity	Subjectivity
Epistemological assumption	Positivism	Phenomenology
Aims of inquiry	Universality	Particularity
Role of researcher	Outsider	Insider
Researcher-respondent relationship	Detachment	Involvement
Research method	Statistics	Description

Source: Lee (1992)

Quantitative and qualitative research methods may be combined to triangulate findings (Firestone 1987; Onwuegbuzie & Leech 2004). However, as has been discussed, this thesis uses a purely qualitative approach due to the nature of the enquiry. Triangulation of findings was applied purely within the qualitative realm, for example by the application of *member-checking* (Russell & Gregory 2003) which will be the described in more detail in Sections 3.4.2 and 3.5. A set of qualitative in-depth semi-structured interviews with 32 participants from nine tourism industries' stakeholder categories were conducted. The research questions were formulated as a result of the identification of insights from the immediate literature in Chapter 2.

3.2.3.3 Quantitative research methods

Traditionally, quantitative research methods have dominated the sciences (Guba & Lincoln 1994; Morgan & Smircich 1980). However, whilst statistical methods may serve to describe phenomena, they are unable to establish explanatory theory (Haig 1995). Quantitative research employs fixed measurements in fixed surveys/questionnaires and hypothesis testing is applied with minimal reference to the actual meaning of what is under observation (Bryman 1984;

Emerson 1981; Johnson & Harris 2002; Morgan & Smircich 1980). Quantitative research is locally and specifically constructed and therefore supports the ontological perspective of potentially multiple realities (Laverty 2008).

In discussing the potential flaws of quantitative research Flyvbjerg (2006) states that it may lead to *stultified* work in which the researcher does not gain the skills required to achieve high-level understanding. Morgan and Smircich (1980, p. 498) posit that quantitative approaches may cause the manipulation of data in which social scientists '*are in effect attempting to freeze the social world into structured immobility and to reduce the role of human beings to elements subject to the influence of a more or less deterministic set of forces*'.

Whilst there is considerable literature justifying quantitative research, this research was viewed as exploratory and therefore it was difficult to identify what needed to be quantified. Additionally, having briefly considered quantitative research methods for this thesis, it was decided that such an approach would not be appropriate in consideration of the advice rendered by Flyvberg (2006) and Morgan and Smirchich (1980) regarding manipulation of results. It was deemed that the results would potentially not be a true reflection of the answers bequeathed by participants in regard to this specific theme. A further issue was the difficulty of access to the research sample, and in practice it took considerable time to gain access to people (airlines' executives) whose work lives are very busy. Obtaining large enough samples for quantitative research would have been outside of the resources of this study. Therefore, a qualitative approach was deemed fitting and subsequently chosen.

3.2.3.4 Qualitative research methods

Whilst there have been many definitions published to classify qualitative research by various writers (Chesebro & Borisoff 2007; Glaser 2004; Howe & Eisenhart 1990; Merriam 2002; Rolfe

2006; Rowlands 2005; Shah & Corley 2006; Shin, Kim & Chung 2009; Soklaridis 2009), many writers and researchers would agree that qualitative research serves to explicate the lived experiences of humans in which the researcher may ascend to an improved sapience and insight as to why the participants behave in the way they do in the real world (Baxter & Eyles 2004; Becker 1996; Emerson 1981; Flyvbjerg 2006; Fossey, Harvey, McDermott & Davidson 2002; George & Bennett 2005; Guba & Lincoln 1994; Hancock 2002; Karami, Rowley & Analoui 2006; Kirk & Miller 1986; Polkinghorne 2005; Warwick & Linenger 1975, quoted in Bryman 1984, p.81; Weick 2007) which can lead to strong theory building (Jaye 2002). Qualitative research is a situated activity which locates the observer in the world (Denzin & Lincoln 2000), reveals the meanings as socially constructed by that observer in the world (Merriam 2002) and does not serve to provide mathematical measurement but rather to provide insight (De Ruyter & Scholl 1998; Morgan & Smircich 1980) as well as '*examine people's actions and interactions*' (Williams 2011, p. 69). In qualitative research the participants can shape their responses to the questions posed by the researcher (Sedgley et al. 2011).

Additionally, qualitative research assists with hypothesis generation (Bock & Sergeant 2002) and Bryman (1984) argues that qualitative research is more fluid in that it emphasises the discovery of novel (or unanticipated) findings as opposed to quantitative research which emphasises fixed measurement. The 1960s and 1970s were a period in which qualitative research was branded as not being suited to the development of knowledge (Snape & Spencer 2003). But recently academia has witnessed a shift towards qualitative research methods (Barbour 2003; Brand & Slater 2003; Collingridge & Gantt 2008; Darke, Shanks & Broadbent 1998; Goulding 1999; Howe & Eisenhart 1990; Kirk & Miller 1986; Morse & Richards 2002; Laverty 2008; Levy 2007; Mays & Pope 2000; Polkinghorne 2005; Polkinghorne 2007). Additionally, Guba and Lincoln (1994) assert the ability of qualitative research to provide rich insight into human behaviour, minimise ambiguity and uncover emic views, in stark contrast to the previously held view that qualitative research was merely '*speculative*' (Goulding 2005). The increased popularity of qualitative

research was a result of a reform movement in the early 1970s which '*posited the idea that evidence, such as personal descriptions of life experiences, can serve to issue knowledge about neglected, but significant areas, of the human realm*' (Polkinghorne 2007, p.472).

Burrell and Morgan (1979), quoted in Lee (1992, p. 89) state that quantitative researchers view the social world '*independently of the individual's appreciation of it*' and that in contrast qualitative researchers predicate the social world as '*external to the individual's cognition*'. Further to this Borland (2001, p.8) states that '*qualitative research can also be used to explore the meaning that humans attach to quantitatively derived and tested conclusions, which is the third step in systematic scientific inquiry*'. Accordingly, because its data is complex, qualitative research may only be approached in context (Guba & Lincoln 1994; Morse & Richards 2002) by applying a holistic approach in which the totality of human behaviour and organisational systems are studied leading to more complete understandings on the part of the researcher (Connell & Lowe 1997).

It is in qualitative research that the researcher gains advanced understanding and achieves uncertainty reduction as a result of having positioned him/herself in the context under study (Flyvbjerg 2006; Sofaer 1999). Additionally Cobb (1996), states that the purpose of qualitative study is to assess the impressions, expectations and prejudices of the participant. Yeung (1995) on the other hand argues that qualitative research allows the participant to gain a greater appreciation of the research as well as develop a trust relationship with the researcher and Hancock (2002, p. 2) states that '*qualitative research seeks to answer questions about*:

- *How people behave the way they do;*
- *How opinions and attitudes are formed;*
- *How people are affected by the events that go on around them;*
- *How and why cultures have developed in the way they have*

- *The differences between social groups*'.

Epistemologically, the knowledge gained from qualitative research may not be universally generalisable (unless the consumer of the report is the sole object of study (Borland 2001; Merriam 1995)) however qualitative research does render insightful knowledge into the nature of the social world (Becker 1996; Morgan & Smircich 1980). Generalisability is further discussed in Section 3.7.5.

Shin et al. (2009) argue that current bodies of qualitative research lack ample data analysis methods for guiding novice qualitative researchers. They state that serious frustration and confusion are experienced by researchers due to the discrepancies prevalent in some works whereby writers present an analysis methodology and then apply seemingly different analysis procedures and/or description styles. Morse (2009) argues that the over-laps between various qualitative methods are such that even the nomenclature of methods of various researchers, conflict. Caelli et al. (2008) found that some research does not even contain a methodological (and ultimately, philosophical) orientation.

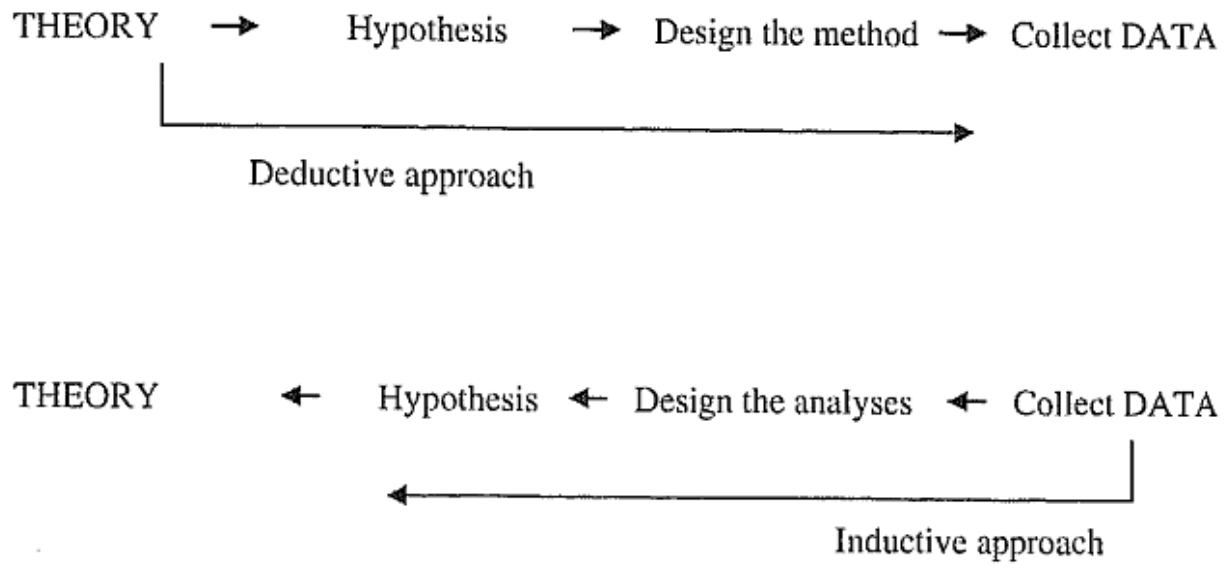
Having presented a general overview of qualitative research, a brief discussion of inductive-deductive research, a qualitative research method (Coyne 1997; Froggatt 2001) follows, which with the application of semi-structured in-depth interviews which will be methodologically applied in this thesis.

3.2.3.5 Inductive-deductive qualitative research

This thesis applied a combined inductive and deductive qualitative strategy, which Jogulu and Pansiri (2001) identify as a strength in research. Inductive research is conducted such that concepts and theories are being developed according to the data collected for the research

(Knox 2004; Mesquita 2007; Söderlund & Wärnelid 2008), that is, the generation of theoretical innovation starts after the data is produced (McMillan & O'Driscoll 2006). In the deductive method, the theories and concepts are analysed prior to the researcher's commencement of data-collection. The research questions are developed in relation to those theories and concepts (Cheng & Feng 2009; Knox 2004; Larsson et al. 2005, quoted in Söderlund & Wärnelid 2008, p. 13; Rowley 2012). Levin-Rozalis (2004) further explicates that for deduction to take place, theory is required in which research questions may be developed. That is, '*investigations begin with ideas and then attempt to disprove them through tests of empirical research*' (McMillan & O'Driscoll 2006, p. 90). Fook (2002) varies this by stipulating the requirement of '*pre-existing frameworks'* and adds that '*inductive approaches involve a development of theory from data itself*' (p. 7). A depiction of the inductive-deductive contrasts is presented in Diagram 3.2 below.

Diagram 3.2: Comparison of deductive and inductive models of research



Source: McMillan & O'Driscoll (2006)

Morse and Mitcham (2008) challenge the inductive-deductive method. They argue that researchers may not be mindful of what must be observed (induction) for transcription. Gasson (2004) argues that '*inductive analysis is treated as suspect because it introduced subjectivity into research and so the findings can be challenged*'. However, Finfgeld-Connett (2006) stresses the importance of an inductive-deductive process in qualitative research in order for the researcher to establish concepts.

In this thesis, the literature review has presented a series of propositions in which possible outcomes in the data may eventuate after data-coding (deduction), and the results are tested against those propositions (induction). Member-checking was extended to all participants in order to minimise the chances of errors in the original narrative transcriptions.

3.2.4 Justification for using in-depth interviews

Interviewing is a major method of data collection in qualitative research (Beto & Bruemmer 2009; DiCicco Bloom & Crabtree 2006; Golafshani 2003; Jennings 2005; Rowley 2012; Starks & Brown Trinidad 2007; Wimpenny & Gass 2000). In-depth interviewing, a key form of data collection (Berry 1999; Corbin & Strauss 1990) is utilised to obtain knowledge of the interviewees' points of view (Curry et al. 2009; Guion 2006) and deep perspectives (Becker 1996; Guion 2006; Saele 2007; Snape & Spencer 2003). Theories are empirically developed through the process of induction (Egan 2002; Soklaridis 2009) and Wimpenny and Gass (2000) discuss the importance of conducting unstructured interviews in which the interviewee is given the chance to provide rich in-depth responses to open questions and the researcher gains an understanding of the private and personal concerns of the interviewee. Wimpenny and Gass (2000) also argue that interviewing has not only been rendered synonymous with qualitative research, but is also an accepted data collection method irrespective of the qualitative methodology chosen. According to Merriam (2002) and Polkinghorne (2005), the 3 main

techniques for data gathering in qualitative research are interviews (being the most common), observations and documents. The sole data-gathering methodology applied in this current thesis has been in-depth interviewing in which the narratives and coding were developed as a result of those interviews.

3.3 The research and interview questions

The research theme is "*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"?

Two research questions were developed in order to research the theme, and 14 interview questions were developed based on the research questions. Interview questions IQ1 through to IQ5 were asked to answer research question RQ1. Interview questions IQ6 through to IQ14 were asked to answer research question RQ2.

Table 3.2: Research and interview questions; and data summary (reduced from sections 2.2.6, 2.3.5 & 2.4.7)

Research questions	Summary of data	Interview questions	
RQ1. ***How does the growing number of baby boomer air travellers impact the civil aviation industry*?**	• Increased pressures on the fully fledged airlines to compete with the LCCs. • Increased and enhanced communication and customer service skills of airlines staff. • Abilities of the airlines in regard to airport/ground handling operations. • Improved aircraft access and airport infrastructure. • Improved user-friendly IT services, such as online check-in and self-service technologies. • Increased focus on aviation medicine. • Streamlined security procedures. • Improved cohesion between various industries of the tourism sector. • Varying recognition of baby boomer financial capacities. • Increased provision of premium economy class. • Ability of the fully fledged airlines to compete with the increasing numbers of LCCs. • Increased focus on aviation medicine, including further measures to avoid DVT episodes. • Increased provisions of inflight equipment such as defibrillators, compression stockings and drinking water. • Increased and enhanced communication and customer service skills of airlines staff. • Improved spacing between seats. • Improved meals. • Increased provision of premium economy class.	**IQ1**	*How do you think a growing number of baby boomer travellers would impact the aviation industry*?
		IQ2	*Do you consider that airlines' managements recognise a commercial opportunity in a much larger number of older people travelling by air*?
		IQ3	*In the future, if we look out 5-10-20 years, what impact do you expect the ageing population will have on the airlines*?
		IQ4	*Would seniors-only flights be a viable option as the population ages*?
		IQ5	*Could a subsidiary of the airline catering for the older travellers market be a good option*?
RQ2. ***Do the Australian tourism industries' stakeholders think that the airlines are ready for the operational and organisational changes identified in the literature which this may require*?**		**IQ6**	*What changes do you consider must occur in the airlines in order to service an increase in the over-55 air travellers? What changes do you think they need to make in the future*?
		IQ7	*Could you tell me what changes you think will need to be done in airline medicine to respond to the ageing population*?
		IQ8	*Could you tell me what changes you think will need to be made to airline ground services to respond to the ageing population*?
		IQ9	*Could you tell me what changes you think will need to be made to security to respond to the ageing population*?
		IQ10	*Could you tell me what changes you think will need to be made to in-flight comfort to respond to the ageing population*?
		IQ11	*Could you tell me what changes you think will need to be made to the destinations airlines fly to in order to respond to the ageing population*?
		IQ12	*Could you tell me what changes you think will need to be made in customer service/communication to respond to the ageing population*?
		IQ13	*Do you think airlines' managements are creating these changes already*?
		IQ14	*How might marketing/operations arrangements alter as the population ages? Do you perceive that the airline marketing departments consider campaigns aimed at baby boomer travellers*?

Source: Developed for this research

3.4 Sampling

Wilmot (2005, p.1) argues the importance of a '*robust sampling strategy from a well-constructed sampling frame*'. With the exception of the baby boomer participants, this research utilised *purposive sampling*, also referred to as *theoretical sampling* (e.g. Connell & Lowe 1999; Draucker, Martsolf, Ross & Rusk 2007; Marshall 1996; Shah & Corley 2006) which Collingridge and Gantt (2008) and Teddlie and Yu (2007) stress is intended to fulfill a particular purpose of the researcher's work. Such sampling may serve to achieve representativeness and consistency (Strauss & Corbin 1990). The sampling method is discussed in Section 3.4.2. *Convenience sampling*, was applied for the selection of baby boomer traveller participants, with one exception (*n*=4). Convenience sampling involves the selection of participants who are the most accessible subjects (Marshall 1996; Onwuegbuzie & Leech 2007b; Russell & Gregory 2003; Teddlie & Yu 2007).

In this research, it was resolved (after the initial plan of only interviewing airlines foundered due to a lack of positive responses) that rather than exclusively researching the perceptions of airlines, other tourism stakeholders would be incorporated for the purpose of identifying any variations in the perceptions of those stakeholders. A combination of purposive sampling (the dominant sampling method) and convenience sampling was applied.

3.4.1 Definition of the target population

Forsyth (2001) identifies tourism industries and consumers as being amongst the most relevant groups in respect of airline services. Writers such as Driml et al. (2010), Goodenough and Page (1993), Leiper (2008), Sinclair (1998) and Williams and Jantarat (1998) discuss the composite nature of tourism in which tourism comprises of multiple industries which interact. Leiper (2008) argues the importance of referring to the *tourism industries* rather than a singular

industry. This research has been conducted in the Australian national context. The perceptions of participants representing tourism stakeholders in Australia were studied. Thus the target population for this research comprises executives/managers from the following 8 stakeholder categories of the Australian tourism industries:

- airports
- coach operators
- cruise lines
- state government tourism bureaus
- tourism education providers
- tourism industry associations/councils
- tour operators/travel agents
- travel insurance companies.

Additionally, baby boomer travellers (Australian residents, born between 1946 and 1964, who travel at least once per year on regional, domestic or international flights) were included as stakeholders.

3.4.2 Sampling method

Sample selection in qualitative research bears effect on the quality of the research (Coyne 1997). Coyne (1997) further discusses the importance of maintaining appropriateness in the research with regard to selecting participants who are not only articulate and reflective, but are also willing to share information with the researcher. Furthermore Lingard et al. (2008) argues that '*participants are chosen for their ability to confirm or challenge an emerging theory*' (p.459).

The practice of selecting viable sources, Polkinghorne (2005) stipulates, leads to validity and trustworthiness of qualitative research and because statistical representation in qualitative research is not required (Snape & Spencer 2006; Wilmot 2005), it was the intrinsic features of interviewees which were of importance for this research, including any variations in information (Strauss & Corbin 1990) which the stakeholders could confer. Furthermore, in qualitative research, theoretical propositions are of value as opposed to generalisable data (Bryman 1988, quoted in Bakir & Baxter 2011, p. 411).

Purposive sampling seeks to procure data from participants who serve a specific purpose consistent with a study's main object of research – that is, participants who have experienced the phenomenon under study (Collingride & Gantt 2008; Polkinghorne 2005; Starks & Brown Trinidad 2007; Thomson 2011). Supporting this, Merriam (2002) states that because qualitative research seeks to understand the meaning of phenomenon from the perspectives of participants, *random sampling* is rendered futile and it becomes important to select a sample of participants from which the most may be learned and Gerring and Seawright (2008) argue that random sampling is not suited to small participant numbers.

Because of the broad nature of the *tourism industries* that is argued by writers such as Driml et al. (2010), Goodenough and Page (1993), Leiper (2008) and Williams and Jantarat (1998) and because the selected interviewees needed to meet the criterion of being members of stakeholder groups and airlines (Russell & Gregory 2003), it was decided that purposive sampling should take place amongst participants from a variety of stakeholder categories. This served to deepen understanding of the investigated experience (Polkinghorne 2005). There was some effort to apply *snowball* sampling, in which participants were asked if they could provide the contact details of any industry colleagues who might be interested in participating (Polkinghorne 2005). Some participants volunteered information on possible contributors but these people did not respond to e-mails and voice-bank messages and additionally, some of the

contacts were those of stakeholders who were contacted during attempts to implement the initial research proposal.

For the baby boomer participants (*n*=5), (and with the exception of one participant) *convenience sampling* was applied (*n*=4) in which the samples were selected from a network of contacts known to the researcher. Convenience sampling involves the selection of participants on the basis of the accessibility (Marshall 1996; Onwuegbuzie & Leech 2007b; Russell & Gregory 2003; Teddlie & Yu 2007), however Marshall (2006) warns that this sampling practice may lead to poor quality data and lack intellectual credibility. One participant, who was contacted and was asked to partake in the capacity of a travel insurance agent (purposive sampling) asked to be interviewed in the capacity of a baby boomer traveller instead. The criteria applied when selecting baby boomer travellers to partake in this research were (i) that the participant be born between 1946 and 1964, as defined by the ABS and (ii) that the participant experienced travel by air (domestic or international) on at least one occasion annually.

To include representation from all possible Australian tourism industry stakeholder categories was beyond the scope and resources of this thesis. The acquisition of the tourism contacts initially commenced through tourism industry sources, namely the online e-travel blackboard and through internet surfing for individual participants. The participants (*n*=32) were initially rung by phone and then e-mailed with the questionnaire (which was to be used in the face-to-face interviews) as well as the SCU (Southern Cross University) HREC (Human Research Ethics Committee) information sheet and consent form (see appendix). This was then followed up (phone and/or e-mail) to arrange an appointment time. Participation in all cases was on a voluntary basis. In total, 32 interviews were conducted with various tourism industries stakeholders from the nine categories listed in Section 3.4.1. As discussed, accessing participants from all the possible categories of stakeholders would have been beyond resources of this research. Other stakeholders for example may have included tourism marketing firms,

MICE (meetings, incentives, conferences and exhibition) agencies, hotel chains, information centres, theme parks, tour guide associations, wineries, tourism consulting agencies and currency exchange bureaus. Each participant was advised, both verbally and in most cases also by e-mail, that participation was purely voluntary, that confidentiality would be maintained and that the research was approved by SCU's HREC.

3.4.3 Sampling frame

Neuman (2006, p.225) states that '*A good sampling frame is crucial to good sampling*'. Because the target population associated with this research was focused on categories of Australian tourism industries, exigency required the researcher to approach industries' sources to acquire contact details of potential research participants. With the exception of 4 of the 5 baby boomer travellers, the stakeholders' contact details (including one baby boomer, who was initially contacted in the capacity of a travel insurance agent) were sourced from a variety of databases, including:

- The online e-travel blackboard phone directory, mainly for cruise lines, travel insurance providers, travel agents/tour operators and coach operators;
- Internet surfing of stakeholder websites;
- four of the five baby boomer travellers were personally known to the researcher.

3.4.4 Sample size

Qualitative research samples are generally small (Crouch & McKenzie 2006; Wilmot 2005) and if analysed felicitously, additional samples should not contribute much new evidence (Snape & Spencer 2006) because a phenomenon need only appear once (Marshall 1996; Wilmot 2005). Wilmot (2005) further discusses the pauperised ability of the researcher to manage large

quantities of broad and in-depth data. Moreover, Wilmot (2005) argues that in purposive sampling, the number of participants is of less importance than the criteria employed to select them and accordingly, the practice of purposive sampling is one of non-probability. Additionally, when considering the actual number of participants Starks and Brown Trinidad (2007) posit that because even an individual may generate hundreds and possibly thousands of concepts, interviewing large numbers of respondents for the purpose of achieving rich data sets is not required and the number of respondents is dependent on the purpose of the study. The sample sizes achieved in the current research from amongst the various tourism sector stakeholders were as per Table 3.3 below.

Table 3.3: Participant sample

Category (Stakeholder)	**Professional profile (non-baby boomers)** **Personal profile - ages (baby boomers)**	**Number of participants (*n*)**
Airports' managements	Corporate affairs manager (2), general manager, general manager – aviation.	4
Cruise lines	Air, sea and pier manager.	1
Coach operators	Proprietor, general manager.	2
State government tourism bureaus	Director – strategic initiatives, manager – access, director – aviation.	3
Tourism education providers	Associate professor (school of tourism), senior lecturer (school of leisure, sport and tourism), lecturer.	3
Tourism industry associations and councils	CEO (2), general manager, managing director, secretariat.	5
Travel agents/Tour operators	Proprietor, managing director (3), operations manager, marketing manager, general manager.	7
Travel insurance companies	Operations manager, marketing manager.	2
Baby boomer travellers	Late 40s: University lecturer, Mid 60s: Public servant, Mid 50s: Catholic nun, Early 60s: Insurance broker, Mid-Late 60s: IT Professor	5
Total participants		32

Source: Developed for this research

3.5 Data collection

The constant comparative method of collecting and coding results data is a central tenet in various types of qualitative research (Bakir & Baxter 2011; Basit 2003; Boeije 2002; Draucker et al. 2007; Glaser & Holton 2004; Kendall 1999; Shah & Corley 2006; Strauss & Corbin 1990;

Thomson 2011; Thorne 2000). The researcher constantly compares data (e.g. Williams 2011) until no new information is revealed, a practice referred to by some writers as *informational redundancy* or *data saturation*. Basit (2003) argues that in qualitative research, data analysis is not a discrete segment of activity which is implemented at the end of research but rather an '*all-encompassing activity that continues throughout the life of the project*' (p.145). The author points out that even if the researcher is not actually analysing data in the earlier stages, there is still thought rendered as to how sense is to be made of the data for codification purposes. This was the case in the current thesis in which coding did not commence until advanced stages of data collection. However, the data collected was compared to the data expectations developed after reviewing the literature.

Data collection in this thesis was purely by semi-structured in-depth interviews in which each interview consumed on average 45 minutes to an hour. The advantage of semi-structured interviewing is that it permits a free-flow of textual data (Shah & Corley 2006; Bryman 1984; Morse & Richards 2002). Most interviews (*n*=22) were conducted by phone, nine were face-to-face discussions and one participant chose to e-mail completed answers to the researcher. For the interviews which were conducted face-to-face, handwritten notes were taken, after which they were typed. Phone interviews were typed during the actual interviews. Further discussion regarding the interviewing phase is presented in Section 3.4.2. All typed narratives were e-mailed to the participants to establish the triangulation procedure of *member-checking* (discussed in section 3.4.2) in which only one of the 32 participants made minor amendments which were used for coding. There were some initial requests that the interviews not be audio-recorded, so it was resolved that no recording of any interviews would take place in order to maintain consistency across all interviews.

3.5.1 Pilot interviewees

The initial research proposed for this thesis required the involvement of one or two executives from the operations and/or marketing departments of airlines. Difficulty was experienced in the attempt to gain enough participants for the completion of a doctoral thesis and accordingly, the research questions were reviewed and amended to arrive at the current questions in which the research was expanded to incorporate participants from a broader spectrum of Australian tourism sector stakeholders. Time constraints as a result of the delays endured in attempting to secure initial participants prevented the application of pilot interviews.

3.5.2 Interviewing instrument and method

Stating that interviewing is of major usage in qualitative research Shah and Corley (2006) discuss the importance of the researcher asking the participant questions regarding their experience of the phenomena under study. Differing perspectives on topics may be gained through interviewing. Owing to the need to extract deep and rich information from the participants of this research, the analysis of documents (other than those associated with the literature review, Chapter 2) and provision of observations was beyond the resources of the researcher but could be included in future research. The current research used in-depth interviewing as the sole data-collection method.

Due to physical distances, with most interviewees being located interstate, many of the interviews were conducted by phone and several were conducted in various Sydney locations, consuming approximately 45 minutes to an hour each on average. One interstate tourism bureau manager decided to complete the interview questions and e-mailed them to the researcher. Interviews conducted by phone were typed during the conversations. Face-to-face interviews were recorded by hand and then typed, after which all typed interview narratives

(with the exception of the one completed and e-mailed by state tourism bureau manager) were e-mailed to the participants for their perusal and to notify the researcher of any required amendments, a process cited by Fade (2003), Johnson (1997), Merriam (1995), Laws and McLeod (2004) and Russell and Gregory (2003) as *member-checking*, in which the credibility of findings, a form of triangulation, may be achieved (Fade 2003). Whilst the opportunity for member-checking was offered to all participants, only one, a regional tourism association representative, responded in this regard.

3.5.3 Data recording, transcription and storage

After completion of interviews (phone or face-to-face, as well as the single e-mailed completion); and after receiving any member-checked interviews, all typed interviews were stored electronically and any hard-copies of handwritten interviews, stored in a locked filing cabinet.

3.6 Data analysis method

As discussed, the methodology for the data collection and analysis employed in this thesis was purely qualitative. The data was manually collected and tabulated according to codes (with the application of open coding, as will be discussed in Subsection 3.6.1) and themes under each code as presented in Chapter 4. Data was subsequently compared to data expectations determined in the literature review (Chapter 2).

3.6.1 Coding

Whilst computer assisted qualitative data analysis software (QACDAS) packages such as WinMAX, NVivo, NUDIST, MAXQDA and Atlas.ti are available to assist the researcher in the

codification of qualitative data (Lewins & Silver 2004), '*none are capable of the intellectual and conceptualising processes required to transform data into meaningful findings*' (Thorne 2000, p.1) and nor are they able to perform analyses (Basit 2003; Russell & Gregory 2003). The researcher must categorise, segment and analyse the data, regardless of which computer software is used and regardless of whether software is used at all. Furthermore, QACDAS '*…may misconstrue the nuances of language and meaning*' (Bong 2002, quoted in Rettie et al. 2008, p. 2) through which the researcher may be alienated from the data (King 2010; Webb 1999). It was decided that codification and analysis in this thesis would take place manually without any QACDAS software. This was because the data involved complex sub-segments and was very detailed, and because interpretation by the researcher during the coding was required; manual coding was determined to be most appropriate as a technique. Tables were developed with the application of Microsoft Word. Codification of the data is presented in Chapter 4.

A considerable amount of data in the form of narratives is formed in qualitative research, making it difficult for the researcher to reduce the information into meaningful data (Mankelow 2003). In his Doctor of Business Administration thesis, Mankelow (2003) discusses the benefits of utilising a '*conceptual framework based on a research problem and questions complemented by a data analysis framework*' (p.92). Such application forms the grounds of coding which in turn provides '*the building blocks for subsequent theorizing*' (p.92). Moreover, the researcher must be able to manage the data such that it is transformed '*into information and information into knowledge and knowledge into wisdom*' (Davenport & Prusak 1998, quoted in Chenail 2012, p. 248).

The aim of coding is to arrive at systematically derived core categories or commonalities as referred to by Ayers et al. (2003), which become the focal concepts which contribute to theoretical development (Douglas 2003). The data collected by the researcher in grounded

theory research causes concepts to emerge during analysis, after which the researcher develops core categories which in turn serve to account for most of the variance in the data (Strauss & Corbin 1990). In this thesis, inductive-deductive testing was applied in which the emergent data was tested against literature findings in Chapter 2.

Three techniques in qualitative research (mainly grounded theory) proposed by Strauss and Corbin (1990) are *open coding*, *axial coding* and *selective coding* (Bakir & Baxter 2011; Douglas 2002; Draucker et al. 2007; Jackson 2006; Kendall 1999; Pandit 1996; Strauss & Corbin 1990). Following is a brief explication of these three qualitative analysis techniques:

Open (substantive) coding is the process of studying every passage of an interview to determine what has been said. The passages are labelled with an adequate code (Boeije 2002) in which the mass of data is condensed into categories (Basit 2003; Neuman 2006). Jackson (2006) suggests that coding may be line-by-line, or paragraph-by-paragraph and then by entire documents. Coding schemes' theoretical constructs are developed by the researcher as data emerges (Kendall 1999) and coding of data continues until no new data manifests.

In her study of couples coping with multiple sclerosis (MS), Boeije (2002) identified 5 steps in the application of open coding, the first three of which were applied to this thesis. The last 2 steps were more relevant to dyadic relationships, and are not a feature of this research and accordingly, those 2 steps have been omitted from the following discussion. The 3 relevant steps discussed by Boeije (2002) relevant to this current thesis are:

1. Comparison within a single interview. This means comparing the answers given in any one interview by the one participant and seeking consistency;
2. Comparison between interviews within the same group. In this thesis, this step entailed comparing the interviews of the participants amongst any one of the categories of tourism

industry stakeholders, for example, comparing the interview data of various airport managers;

3. Comparison of interviews from different groups. For the purposes of this research, this was fulfilled by making an inter-stakeholder comparison of the results and this served as a method of triangulation. For example, comparing the data rendered from airline managers with that of travel insurance companies.

Thus, the open coding in this immediate thesis mainly applied the latter 2 discussed by Boeije (2002). Initially the coding was completed in groups of the same tourism industries' stakeholders of participants together (e.g. Baby boomers); this was followed by comparisons of the interviews from across all categories of the stakeholders. Such coding yielded ample themes which were manageable and thus reported in chapter 4.

Axial coding is the process of '*reassembling data fractured during open coding*' (Jackson 2006, p. 68). Neuman (2006, p.462) states that axial coding is a *second pass* through the data and in support of this Douglas (2003) states that axial coding follows open coding. In axial coding, rather than just establish categories as is done in open coding, connections between the actual categories are formulated as a result of open coding (Kendall 1999). The purpose of axial coding is to reassemble the data which has been fractured during the process of open coding (Jackson 2006). Each category presents a phenomenon and may serve to explain what is occurring and each category is a problem, issue, event or happening that is defined as being significant to respondents. Greater explanatory power is then rendered to sub-categories which may answer questions about the phenomena, thus axial coding presents a focus on the conditions which give rise to a category or phenomenon (Jackson 2006; Kendall 1999).

Selective coding involves the selection of a core category, being the category of data which accounts for most of the variation of the central phenomena of concern and around which all

other categories are integrated. It is at this final point that the researcher may start to derive theories (Bakir & Baxter 2011).

3.6.1.1 Coding in this thesis

This thesis only employed open coding as it was deemed that the data revealed from this form of coding was ample and as such the application of axial and selective coding was not required. Whilst axial and selective coding were also considered, the results of the open coding (as presented in Chapter 4) fitted the data and was also logical given the breadth of the types of stakeholders of the tourism industries. The open coding was then followed with discussion in regard to findings and their correlation with the immediate literature (Chapter 2). This coding process produced clear data and no further coding was required.

3.6.2 Other analytical processes utilised

Coding of the participants was required in this thesis to (i) reduce the large volume of data, and (ii) to compare the data amongst various participants and (iii) to maintain confidentiality of the participants' identities. Coding of participants was applied as per Table 3.4 over the page.

Table 3.4: Participant coding

Category (Stakeholder)	***N***	**Codes applied**
Airports managements	4	AP1, AP2, AP3, AP4.
Cruise lines	1	C1.
Coach operators	2	CO1, CO2.
State government tourism bureau	3	TB1, TB2, TB3.
Tourism education providers	3	TA1, TA2, TA3.
Tourism industry associations and councils	5	TI1, TI2, TI3, TI4, TI5.
Travel agents/Tour operators	7	TO1, TO2, TO3, TO4, TO5, TO6, TO7.
Travel insurance companies	2	TIC1, TIC2.
Baby boomer travellers	5	BB1, BB2, BB3, BB4, BB5.
Total participants	**32**	

Source: Developed for this research

3.7 Quality and related procedures

Member checking was applied in this thesis. Member checking is a process by which participants assist the researcher in confirming that the data in the narratives is a true representation of the information rendered during the course of the interviews (Fade 2003; Johnson 1997; Merriam 1995; Laws & McLeod 2004; Russell & Gregory 2003). The participants were e-mailed (most within 24 hours, but all within 48 hours) the typed narratives and invited to make requests for any amendments to the data. One state tourism industry council made minor requests for amendments by e-mail. This represented one participant out of the 32 who made requests for any amendments to the typed narratives.

3.7.1 Limitation of the methodology

A limitation which is inherent in qualitative research is that the findings are only valid for the immediate contexts to which the research is applied (Dorairaj, Noble & Malik 2011; Yonge 2009). Therefore generalisability (referred to by Lee 1992, as *universality*) may not be achieved. The contexts were dictated by the choice of research location, which in this thesis was Australia. The findings of this research may not be applicable to any other national contexts; that is, the perceptions of other Australian tourism sector stakeholders with regard to the airlines' readiness in the handling of the growing number of baby boomers flying, in other nations.

A potential further limitation is that it was not possible to include participants from every one of the tourism stakeholder categories (nine have been chosen for this thesis), as such a practice would be beyond the resources of this research. Furthermore, it may not be possible to extend the perceptions in this research to all Australian tourism stakeholders. Thus, the relevant stakeholders were based on the sample frame available, i.e. positive framing.

In regard to sampling a limitation exists in the sampling of the baby boomer traveller participants (n=5). Here, convenience sampling was applied (for four of the five participants) so that (i) the researcher could access subjects willing to participate and (ii) a network of contacts could be easily accessed. Thus, the sampling of the baby boomer travellers was done using convenience sampling and not random sampling. As discussed in section 3.4, convenience sampling is based upon a sample which is most accessible (e.g. Draucker et al. 2007). These 4 participants were the ones available at the time of research, willing to partake in interviews. Furthermore, again discussed in section 3.4, 28 participants were selected based on purposive sampling which Strauss and Corbin (1990) explicate serves to fulfill a particular purpose. That purpose was to acquire participants to partake in this immediate research, based on their

representation of various tourism industries' stakeholders (i.e. the composition of industries forming tourism, e.g. Leiper 2008) which interact with the civil aviation industry as per the discussion in section 2.3.6 regarding stakeholder theory and its relevance to civil aviation. Time frames available for this thesis' completion along with difficulty in securing further participants inhibited a larger number of samples. However (as discussed in section 3.4.4) qualitative research produces copious amounts of rich data (Starks & Brown Trinidad 2007) and thus the ability to gain ample themes from felicitously analysed text (Snape & Spencer 2006) was achieved. Therefore the sample size of 32 participants was deemed adequate.

Finally, as can be the case in semi-structured in-depth interviewing, the presence of the researcher (in this thesis, in the capacity of a doctoral candidate) may influence the various participants which in turn may become the cause of bias. In addition, participants may misunderstand the open-ended questions (Bakir & Baxter 2011).

3.7.2 Privacy and confidentiality

SCU's HREC code of ethics provided safeguards to ensure the protection of the identities of the participants and the organisations which they represented. As a result, in this study, only the researcher knew the identities of the participants – hence the codes developed in Table 3.4.

3.7.3 Validity

Validity, a core principle in qualitative research (Neuman 2006) has drawn numerous definitions from many writers (Koro-Ljundberg 2008; 2010; Onwuegbuzie & Leech 2007; Seale & Silverman 1997). Validity refers to the authenticity, truthfulness and believability of the findings in research (Guion, Diehl & McDonald 2011; Merriam 1995; Neuman 2006; Polkinghorne 2007; Whittemore, Chase & Mandle 2001). The criteria for achieving validity (or credibility as it is

referred to by some researchers; Koro-Ljundberg 2008; Shah & Corley 2006) in qualitative research have been the subject of long debate (Whittemore et al. 2001). As Polkinghorne (2005) states, the selection of viable sources of data leads to validity and trustworthiness in qualitative research and this is supported by Pandit (1996) who argues that validity and reliability are enhanced by the use of multiple sources of data collection. Koro-Ljundberg (2010) argues that validity may be defined in numerous ways, dependent on epistemological and theoretical considerations and Johnson (1997) identifies 3 types of validity:

- Descriptive validity: refers to the factual accuracy of the data reported by the qualitative researcher (leading to the understanding of the participants on the part of researcher, as presented in the report);

- Interpretive validity: is obtained to the degree that the participants' viewpoints, thoughts, intentions and experiences are accurately understood and reported (an accurate portrayal of meanings attached by the participants on the part of the qualitative researcher);

- Theoretical validity: is obtained to the degree that a theory or theoretical explanation developed from a research study fits the data and is, therefore, credible and defensible.

However, because qualitative research is open-ended and less structured than quantitative research, a potential flaw with validity is researcher bias (Johnson 1997) in which the researcher's *a priori* assumptions are transferred to the participant subconsciously which potentially affects the participants' experiences, behaviours or attitudes (Onwuegbuzie & Leech 2007; Bluhm, Harman, Lee & Mitchell 2011). In contrast Merriam (1995) states that validity is a major strength of qualitative research. In this research, all participants were e-mailed the typed narratives of the research interviews and given the opportunity to make requests for amendments.

3.7.4 Reliability

Merriam (1995) states that the questions most commonly posed to qualitative researchers are associated with the reliability and validity of their research findings. According to Merriam reliability is concerned with the extent to which the findings of the researcher may be replicated should the study be repeated. Reliability implies consistency, dependability (Neuman 2006) or trustworthiness (Golafshani 2003) and as with the concept of validity, reliability is difficult to codify in qualitative research (Seale & Silverman 1997). Golafshani (2003) suggests that research which has been completed with reliability as a criterion is rendered '*no good*' (p. 601).

Neuman (2006) and Seale and Silverman (1997) state that authenticity is the issue rather than reliability in qualitative research and according to Seale and Silverman (1997) the aim is to attain an authentic understanding of people's experiences and to achieve this open-ended questions are the most effective. In contrast, Pandit (1996) states that reliability is enhanced with the usage of multiple data sources.

Reliability has been difficult to achieve in this thesis even within each of the stakeholder groups under study. Though many answers provided by various participants were similar across the questions presented (as will be expounded in Chapters 4 and 5), there were also instances of great disparity in answers even in same or similar stakeholder groups. See Chapter 5 for the comparisons drawn across stakeholders.

3.7.5 Generalisibility

Generalisability, also referred to as external reliability, is the extent to which the findings of a study may be applied to other situations (Merriam 1995; Morgan & Drury 2003; Neuman 2006).

As discussed, amongst the limitations of qualitative research is its inability to provide generalisability unless the consumer of the report is the sole object in the study involved (Borland 2001; Merriam 1995). In contrast, Onwuegbuzie and Leech (2007b) report the prevalence of researchers who discuss the notion of *approximate generalisations* in qualitative research. Moreover, in a statistical sense, qualitative research does not serve to produce generalisable proofs (Fade 2003). Furthermore, although the knowledge gained from qualitative research may not be universally generalisable it does serve to provide insightful knowledge on the nature of the social world (Morgan & Smircich 1980). Worth noting is Gibbs, Kealy, Willis, Green, Welch and Daly (2007) in which the authors relate the difficulty in establishing generalisability of findings of qualitative research to the lack of sampling information. Moreover, according to Lee (1992) quantitative methods which emphasise objectivity, measurement (reliance on figures and statistics), reliability and validity have come to be considered inadequate and therefore descriptions of meaning (with use of language) are needed.

The purpose of this thesis is not to generalise the results of interviews as being the standard views of the whole tourism industries on how airlines are handling the growing cohort of baby boomers. Nor is the intention to test current hypotheses or theories. Rather, it is to gain an understanding from a selection of individuals from across the stakeholders' spectrum in this regard, within the Australian national context. This demonstrates the suitability of the current study to the qualitative methods utilised.

3.7.6 Authenticity

Stenbacka (2001) quoted in Jackson (2010, p.72) identifies and discusses a few concepts pertinent to qualitative research: validity, reliability and generalisability. However, Morgan and Drury (2003) argue that in qualitative research these concepts must not be applied with rigidity. All three areas have been discussed in Sections 3.7.3, 3.7.4 and 3.7.5.

3.7.7 Ethics

Ethical practice in research is vital and the researcher has an obligation to respect the rights, requirements, values and desires of the participants in line with the Nuremberg and Helsinki declarations following the revelations of forced experimentations during the Second World War (McNamee 2002). Pertinent to this, key ethical considerations addressed in this study included informed participant consent, privacy and confidentiality, protection from harm, the consequences of participation and honesty and trust. The research followed the approved Ethics Committee procedures and requirements. In the appendix are copies of the HREC's information letter in which potential participants were informed of the university's approval for the research. The letter was accompanied by a consent form which was to be completed by the participants. This will be further discussed in Subsections 3.7.9 and 3.7.10.

3.7.8 Honesty and trust

The researcher provided commitments to anonymity and an assurance that the research was approved by the university. Furthermore, the rapport which was developed during the interview processes is an important aspect of individual interviewing (DiCicco Bloom & Crabtree 2006; Jennings 2005) in which the interviewer and the participant establish *symbolic interactionism* (Baker, Wuest & Stern 1992; Connell & Lowe 1997; Cutcliffe 2000; Eaves 2001; Froggatt 2001; Goulding 1999; Jeon 2004; Kendall 1999; Morse & Richards 2002; Nyaupane & Poudel 2012; Rowlands 2005; Seldon 2005).

3.7.9 Informed consent

Informed consent is the voluntary participation of the participants, based on their receiving full and accurate information about the study prior to their involvement. The nature and

consequences of the current study were explained to the participants and they were at liberty to withdraw from interviewing at any time. Several potential participants who at first decided to partake subsequently withdrew. A few participants postponed interviews when appointments approached. However, all participants with whom interviews commenced completed the interviews without withdrawal.

For this study, each participant (and potential participant) received a *participant consent form and information sheet* as approved by SCU's HREC via e-mail, when the request was made for participation by the researcher. The form detailed the procedures to be followed, the responsibilities of both parties (participant and interviewer) and the freedom of the participant to withdraw from interviewing at any time. The participants were advised via the information sheets that the notes taken by the researcher during the course of their interviews would be maintained for future reference purposes. A copy of the consent form and the information sheet are provided in the appendix.

3.7.10 Protection from harm and the consequences of participation

The thesis involved the participants partaking in interviews lasting approximately 45 minutes to an hour. At the extreme, one interview (with a tourism academic) lasted an hour and a half. A few interviews lasted between 25 and 30 minutes. The researcher's aim was to maintain the protection of the participants from any possible harm, as far as possible and practicable.

3.8 Summary

This chapter considered the research aim, the research method, the sample and processes utilised for the purposes of data collection for this current thesis. Sampling was used to target participants who were interviewed with the in-depth interview technique.

Triangulation was achieved by interviewing participants from various categories of stakeholders of Australian tourism industries and additionally, member-checking (another form of triangulation) was applied in which the participants were e-mailed the narratives of the interviews and asked to make any requests for amendments they deemed necessary. Finally, the processes observed in this research thesis were in conformity with the requirements of SCU's HREC.

3.9 Conclusion

This chapter discussed the methodology applied in this research, in which the in-depth semi-structured interviews provided an opportunity for the participants from various Australian tourism industries to express their views regarding the civil aviation industry's readiness to handle the growing number of baby boomers flying. Qualitative research applying in-depth semi-structured interviewing to facilitate a free flow of information from the participant was the most appropriate method to use for this current research.

In Chapter 4, the research into the 9 stakeholder groups is presented with specific analyses of the data from the interviews. Chapter 4 provides a general understanding of the perceptions of the nine stakeholder groups with respect to the research questions.

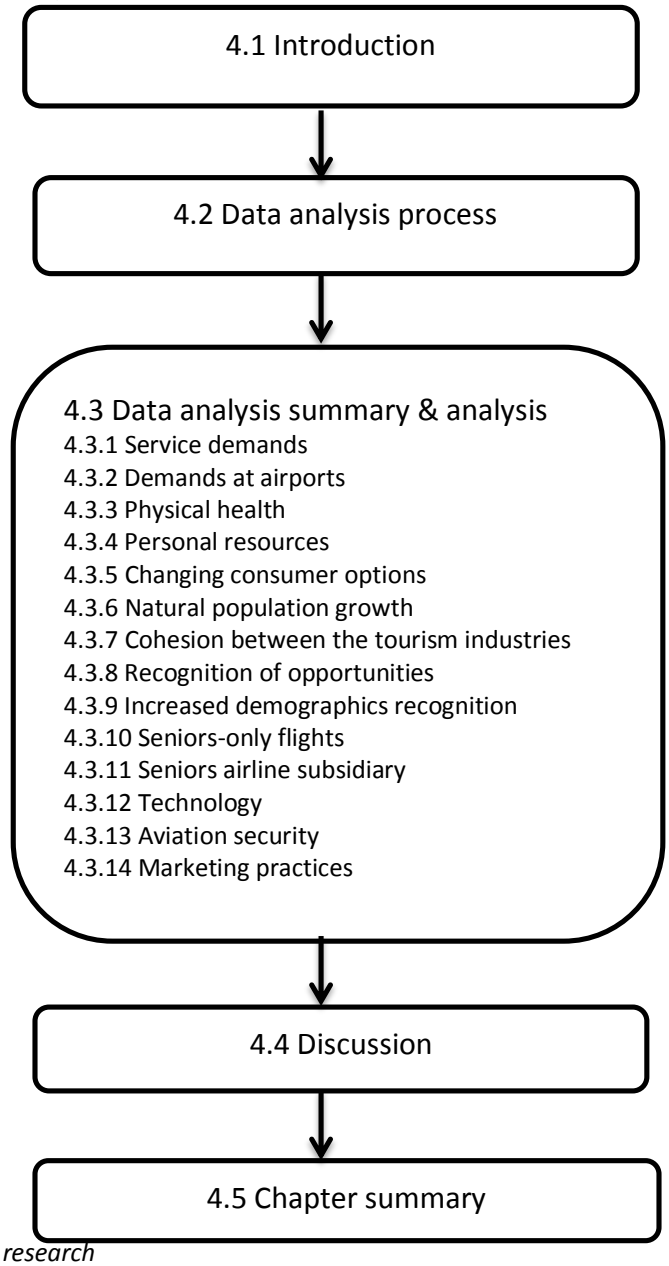
CHAPTER 4

DATA CODING and ANALYSIS

4.1 Introduction and structure of Chapter 4

Chapter 1 justified the research problem, Chapter 2 reviewed literature for this research and Chapter 3 discussed the methodological considerations and provided a justification for the qualitative (inductivist-deductivist) research methodology, explaining the application of in-depth interview surveys. This research uses a qualitative method to answer the research problems, and so data was collected through the instrumentality of in-depth semi-structured interviews. Chapter 4 presents the data analysis and key findings of the in-depth interviews conducted with the tourism industries' stakeholders. Figure 4.1 (over page) illustrates the structure of Chapter 4.

Figure 4.1: The structure of chapter 4.



Source: Developed for this research

The researcher contacted airlines about the research and found that only 3 were prepared to participate. Much difficulty was experienced securing more participation from the civil aviation industry. This experience was initially unexpected. See the appendix for a chronology of events in regard to contacting the airlines. Due to this difficulty the scope of the research was

broadened to identifying the perceptions of a cross section of major stakeholder groups of the Australian tourism industries on the question:

How do Australian-based tourism industries' stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying?

The broadening of the research questions to incorporate the cross section of tourism industries' stakeholders (as discussed in Chapter 3 led to greater success in recruiting interviewees. Interview questions IQ1 to IQ14 were presented to the participants. Chapter 4 summarises and discusses the interview findings in detail and reports on the perceptions of the various tourism industries' stakeholders (including baby boomer travellers), regarding the readiness of the civil aviation industry to handle increasing numbers of baby boomers flying, in an Australian context. Details of the sample (total *n*=32) from nine tourism industries' stakeholders are tabulated in Table 4.1 (over page).

Table 4.1 Participant sample interviewed in this current research

Category (Stakeholder)	**Professional profile (non-baby boomers)** **Personal profile (baby boomers)**	**Number of participants (*n*)**
Airports' managements	Corporate affairs manager (2), general manager, general manager – aviation.	4
Cruise lines	Air, sea and pier manager.	1
Coach operators	Proprietor, general manager.	2
State government tourism bureaus	Director – strategic initiatives, manager – access, director – aviation.	3
Tourism education providers	Associate professor (school of tourism), senior lecturer (school of leisure, sport and tourism), lecturer.	3
Tourism industry associations and councils	CEO (2), general manager, managing director, secretariat.	5
Travel agents/Tour operators	Proprietor, managing director (3), operations manager, marketing manager, general manager.	7
Travel insurance companies	Operations manager, marketing manager.	2
Baby boomer travellers	Religious education lecturer Public servant Catholic nun Insurance broker Information technology professor	5
Total participants		32

Source: Developed for this research

In Section 4.3, each research question is analysed with a discussion and tabulation to illustrate how various stakeholders responded to the research questions.

4.2 Data analysis process

The data analysis employed was open coding followed by a summary of the open codes in Sections 4.3 and 4.4, respectively. Indicative direct verbatim quotes from participants are common in Section 4.3 and they are presented within quotation marks and in italic font.

4.3 Data analysis and summary

Section 4.3 presents an analysis of the codes and categories (within the codes) extracted with the use of indicative quotes, i.e. direct quotes from the interviews, which indicate some of the responses from participants pertinent to the categories. The subsections (i.e. 4.3.1, 4.3.2, 4.3.3 … 4.3.14) are based on the codes extracted, with the categories tabulated below them. Alongside the categories is a depiction of the participant concurrence ad rem to those categories.

4.3.1 Service demands

Table 4.2: *Service demands* categories & participant concurrence

Categories	Participant concurrence
Airports services	BB1, BB2, TI5, TO6
Comfort demands	AP1, BB1, BB2, BB3, BB4, BB5, CO1, CO2, TB1, TI1, TI2, TI3, TI4, TI5, TIC2, TO2, TO3, TO4, TO5, TO6
Communication	AP1, AP3, AP4, BB1, BB3, BB5, TA2, TA3, TI1, TI2, TI3, TI5, TO1, TO4, TO7
Inflight destination education	BB3
Premium economy	C1, TA2, TI1, TI2, TI4, TIC1, TO1, TO2, TO5, TO6, TO7

Source: Developed for this research

- Airport services

There was some contrast between the participants of this category in regard to the use of airports and services offered by airlines at them. Here there were variations in discussions amongst participants in which some cautioned the importance of airlines' staff services at airports. Other participants specified the requirement for new routes. Contrastingly, there was also caution against the use of regional airports within this category.

An example where there was no direct support or rejection of the use of regional airports was a travel agency managing director who stressed that airline services of '*meet and assist is required in large airports … airline staff need to be more on hand to assist*'.

- Comfort demands

Concerns for comfort were accentuated by the majority of participants of this research. These participants (*n*=20) viewed legroom and seating as major issues which the airlines were required to address. It was viewed by participants that baby boomers specifically required more leg room and that due to this, LCC aircraft with their limited leg room and spacing were not appealing to baby boomer air travellers. Participants also expressed concern that baby boomers were required to move limbs more on longer flights and would be prepared to pay for higher levels of service, including premium economy class and business class. An example is illustrated by a tour operator general manager who indicated that:

> '*Airlines would have to offer slightly different products. Baby boomers require more leg room and higher standards of service. As baby boomers get older, there would have to be changes as baby boomers demand different products. There's a growth in LCC's, meaning more cramped seating. This is not appealing to baby boomers*'.

From the aspect of the baby boomer participants, responses were rather emotive in regards to seating;

> '*The baby boomer traveller, being more than one seat from the aisle is always a problem. Baby boomer travellers need to get to lavatories more often, especially males*' (Baby Boomer IT Professor);

'*Cattle class should be removed. All Seats should recline to at least 135 degrees*' (Baby Boomer Lecturer).

- Communication

Almost half the participants of this research, i.e. 15 of 32, rendered answers in relation to communication in which it was resolved that improved communication was required.
Most participants of this category, considered that the airlines were required to improve their communication style and that communication (including that at airports during flight delays) was an important factor for future customer services, in the civil aviation industries.
Participants resolved that baby boomers would be slow to gain familiarity with machines and as such many baby boomers preferred dealing with staff and that it would be in the interests of the airlines to maintain good communication because of civil aviation's reliance on high service levels to air travellers. It was specifically stressed by some participants that airlines could better communicate to baby boomer travellers through travel agents.

A tour operator proprietor resolved that:

'*The baby boomer age group requires better communication than the younger generation. To communicate with different age groups airlines must speak their lingo. Messages must be adjusted accordingly … communication, the way we talk to customers is most important*'.

- Inflight destination education

There was an observation that it would be prudent for the airlines to provide more destination information inflight before arrival and this manner, baby boomer travellers would better appreciate airlines' inflight services. Specifically, the baby boomer public servant considered that;

'*Before an aircraft lands in a destination, it should be done that airlines display short videos regarding the destinations, such as transport options, a little history, sites, tour options*'.

This category was extracted from the interview of one participant and is not considered a major point, however this category was not established in the literature.

- Premium economy

The participants of this category theorised that premium economy class was an appropriate product for baby boomer travellers, given that they wanted a luxury higher than regular economy class air travel, but did not wish to pay the premium rates required for travel in business class. The concept of premium economy class was raised by 11 participants and generally, these 11 participants considered that premium economy class was a good introduction to airline services in which it was also appropriate for baby boomers travellers who were using it. For example, a tour operator marketing manager considered that;

'*The airlines could focus on premium economy. Airlines have removed first class to introduce premium economy. This is a reasonable strategy to attract the baby boomer market*'.

4.3.2 Demands at airports

Table 4.3: *Demands at airports* categories & participant concurrence

Categories	Participant concurrence
Aircraft access	AP1, BB1, BB4, TA3, TB2
Airport infrastructure	AP1, AP2, AP4, BB4, TA1, TA2,TI3, TI4, TIC1, TIC2, TO3, TO5
Airline staffing	AP1, AP4, BB3, BB4, CO1, CO2, TI1, TI5, TIC2, TO2
Baggage handling	AP1, C1, TO4
Ground handling	BB3, BB5, TI3, TIC2
Lounge access	TB2, TIC2, TO6, TO7

Source: developed for this research

- Aircraft access

Participants in this category accentuated a future at airports in which enplaning and deplaning baby boomer travellers would become more challenging and in which airports which operated air bridges may operate better than those airports which rely on the use of stairs for this purpose. The category of aircraft access at airports was a concern expressed by 5 participants, in which it was conjectured that airports utilising airbridges for access from terminal buildings to aircraft and vice-versa would operationally perform better than those airports which are reliant on stairs; i.e. it was postulated that airports utilising airbridges would increase efficiency in contrast to airports relying on stairs. Example, in specific reference to baby boomer travellers, the baby boomer Catholic nun felt it was inconsiderate that:

> '*Passengers are required to board aircraft by stairs … this is unfair on baby boomer passengers, who may have issues such as arthritis*'.

The baby boomer travel insurance broker contrasted this, theorising;

> '*Lifts may be used to get people on to aircraft when aircraft are not accessed by walk ways*'.

- Airport infrastructure

The infrastructure of airports was depicted as a challenge for the future of tourism for baby boomer travellers and within this category there was further discussion of movement around airports in relation to enplaning and deplaning (i.e. moving through airports to access aircraft or from aircraft). In this category there was a concern that airlines were required to consider numerous aspects of airport infrastructure to ensure efficient traveller movement to and from aircraft and comfort whilst waiting at airports for air services. Twelve participants established that airport infrastructure required attention in consideration of baby boomer travellers,

especially those that would bear physical and/or medical impairments, which participants implied would increase in parity with baby boomer traveller numbers. Participants discussed the importance of airlines considering aspects such as parking, access, hearing announcements, passageways, medical facilities, designated waiting areas (with media, food and beverage facilities) and security procedures at airports.

An example of these concerns is resolved by a tourism council managing director, who stated that;

> '*There will be a growing need for infrastructure at airports which cater for the need of people who may be hampered in their movement … increased medical facilities should be provided at airports*'.

Further concurrence of this is mimicked by a tourism lecturer who remarked that because;

> '*more and more people are confined to wheelchairs, airport designs must be better designed for baby boomer travellers*'.

- Airline staffing

Participants in this category advised that future travellers would require more customer service staff at airports, as opposed to the growing prevalence of self-service facilities. They postulated that baby boomer travellers would prefer interact with staff, especially so in regard to baggage handling and check-ins. They cogitated that more personalised airlines services were required, especially with baby boomer travellers, as baby boomer travellers it was postulated did not enjoy self-use technologies. There was discussion that the low staffing levels at airports could potentially serve as impetus for baby boomers to turn to alternative modes of travel such as coach and train.

Indicative of the concerns extracted within this immediate category, an airport corporate affairs manager anticipated:

> '*There would be staffing impacts. Airlines will have to consider that people consider their manpower point-of-view things like assistance to passengers. Airlines will have to consider that people will be slower and this would have to be factored in to operational times, I keep thinking about time, an older population moves slower*'.

The baby boomer public servant postulated that;

> '*Airlines wish to cost-cut and this impacts on staff; this leads to understaffing …people are not cattle, they need more attention. Staff should be more facilitating, especially in the passenger-handling area. Airlines don't tend to grasp this*'.

- Baggage handling

The category of baggage handling did not appear to be a major issue, however a few participants did establish it, in concern that baby boomer travellers may not be physically capable of handling their baggage and accordingly assistance may be required. Participants also associated baby boomer travellers with greater amounts of baggage. For example, the cruise operator remarked:

> '*Airlines could provide more assistance with baggage for baby boomer passengers especially those with disabilities … baby boomer travellers are less mobile*'.

- Ground handling

The general consensus between the participants of this category was that airlines needed to improve ground services for the better experiences of baby boomer air travellers. This requirement was especially in respect of waiting areas and concerns for long queues.

'*Baby boomers will pay for non-stressful ground experiences. More staff [are required] to talk to them at check-in. Express immigration and security screening. Baby boomers could be offered secure and comfortable seating areas with finger food, comfortable seats and media facilities*' (Travel Insurance Marketing Manager);

'*Growth in travel by baby boomers [means] ground handling services would have to grow with it. Standing at carousels can be quite a long time. Ground services would have to be reconsidered as the numbers of people travelling by air increases*' (Tourism Industry Council General Manager).

- Lounge access

Though only raised by a few participants, lounge access for baby boomer travellers was an interesting category in which the participants considered that airlines could either be developing lounges for baby boomer travellers or permitting baby boomers to access current lounges (at a nominal cost), even if travelling economy class. For example, a tour operator marketing manager considered that;

'*Not all airlines have reciprocal agreements with lounges, baby boomers may be willing to pay for lounge access even if travelling economy*'.

4.3.3 Physical health

Table: 4.4 *Physical health* categories & participant concurrence

Categories	Participant concurrence
Increased air crew medical training	BB2, BB3, BB5, TA1, TB2, TIC2, TO3
Inflight physicians	BB3, C1, TA2, TIC1, TO2
Reduced health and mobility	AP1, AP2, BB4, TA1, TA2, TA3, TB2, TI4, TI5, TO4, TO5
Wheelchair facilities	AP1, AP2, AP3, BB1, TB2, TA1, TI2

Source: Developed for this research

- Increased air crew medical training

The data extracted within this category indicated that the participants envisaged increased aviation medicine training for air crews, beyond the basic aviation first aid in current application. The participants from 5 different tourism industries' stakeholder categories postulated that airlines could increase the level of aviation medicine training for air crews (or at least one) such that there could be crew with paramedical training and even nursing-level training. An example of these considerations is discussed by the baby boomer public servant who stated;

> '*It would be great if a physician could be available on board. Crew could be better trained beyond a first aid certificate. Accessibility to defibrillators should be increased. This way in the likes of heart attacks, the crew are competent in using the equipment to keep passengers stable enough till landing at a major port for movement to hospital*'.

- In-flight physicians

Participants demonstrated tenacious concerns for the potential growing prevalence of mid-air medical episodes (as with the immediate preceding category of *increased air crew medical training*). Their perceptions were that inflight medical episodes would increase in parity with a

rise in the number of baby boomers flying, to the extent that this would warrant the airlines offering gratis travel to physicians who would in return commit to attending to such episodes. There was a recommendation that airlines could form a national doctors' pool from which doctors who chose to travel, would obtain the gratis travel in return for the promise of attending to inflight medical episodes.

Indicative of the responses in this category, the travel insurance operations manager highlighted much of the considerations and suggestions made by participants in this immediate category, in which he stated;

> '*In the future perhaps more physicians will need to be called upon if the statistics are correct that passengers are getting older – more baby boomer passengers are travelling. There could even be requirements in basic in-flight treatments. Perhaps the airlines could offer free travel for at least one physician – perhaps more - on each flight in return for attending to any in-flight medical episode*'.

- Reduced health and mobility

Medical issues were identified to not only raise the prevalence of inflight episodes, but also affect the abilities of baby boomer travellers to move around airports, enplane and deplane as well as handle their baggage. The category of reduced health and mobility of baby boomer travellers was established by 11 participants in which the participants predicated that the airlines were required to factor such issues in their operations. The participants were also concerned about the reduced services of LCC's at airports, in which the health and mobility of baby boomer travellers may be affected and in which more time had to be factored in to operations by the airlines. As an example, the baby boomer Catholic nun considered;

'*Getting to airports is a challenge. Kids may not be available to give lifts. Once at the airport one must negotiate baggage and lifts; much walking must be done. Getting to gates is a challenge for people with arthritis. Baggage carousels can present challenges for old passengers*'.

- Wheelchair facilities

Again, the mobility of baby boomer travellers was identified as participants raised wheelchair facilities as being of importance for the movement of travellers through airports. A total of 7 participants contributed to the category of wheelchair facilities, of these were 3 of the 4 airport executives who contributed to this research. Generally, the participants drew a nexus between the use of wheelchairs and the physical abilities of baby boomer travellers. The participants stipulated a crucial requirement that airlines formulate more efficient processes as the growing number of wheelchair requests intrudes on operational times, as baby boomer travellers were considered less mobile and less able to way find around airports, especially as more complicated medical conditions surfaced in parity with the ageing population, in which special wheelchair types may be required. Overall, it was viewed that baby boomer air travellers would become slower in negotiating their ways around airports.

Indicative of the findings of this immediate category, an airport general manager stressed;

'*Accessibility is a major issue, especially wheelchair access. Ability to load/offload wheelchairs to/from aircraft is important. More wheelchairs may be required per flight. Wheelchairs are already too labour-intensive. Airlines have to work out how to better cope with this over time. More efficient equipment, e.g. electronic wheelchairs for passenger movement with minimal assistance*'.

4.3.4 Personal resources

Table 4.5: *Personal resources* categories & participant concurrence

Codes/Categories	Participant concurrence
Increased financial resources	AP1, AP3, AP4, C1, CO2, BB5, TB1, TB3, TI2, TO6, TO7
Financial challenges & constraints	AP2, BB1, BB2, BB3, TIC1

Source: Developed for this research

The code of *personal resources* drew contrasting results. Interesting were these conjecturing views amongst tourism industries' stakeholders. Most participants, who contributed to this code, considered that baby boomers would be affluent travellers with an abundance of financial resources to warrant increased air travel to holiday destinations in the future. On the contrary, other participants considered that baby boomer travellers were financially limited in their spending abilities.

- Increased financial resources

A sizeable minority of participants held tenacious optimism in the category of *increased financial resources* in which the participants presented their views regarding the financial abilities of baby boomers to travel by air in the future. It was considered by the participants that the airlines could economically benefit from the financial affluence of baby boomers, due also to their keenness to travel. Furthermore, there was an acknowledgement (especially from the 3 airport management participants and the tour operator participants, in this immediate category) that the number of baby boomers travelling by air, was indeed rising. Indicative quotes from the participants included;

> '*The baby boomer market will impact airlines and benefit the legacy carriers, example Qantas. It gets to a point when people want luxury in travel. This makes the baby boomer market an opportunity for the legacy carriers. The baby boomers are high*

wealth passengers. They will provide opportunities for the legacy carriers. The baby boomers for them will be a solution to maintain good business and higher yield' (Airport General Manager);

'*This segment is increasing and growing, they travel a lot, they're keen to travel, they have money and time, it's an increasing market segment, they travel for longer periods of time. Baby boomers usually ask for premium economy and business class*' (Travel Agency Managing Director).

- Financial challenges and constraints

Contrastingly, other participants conjectured that baby boomers were not of the financial affluence to travel, thus challenging the previous category in which participants considered that baby boomer travellers were well financed to travel. Here, the participants postulated that baby boomers were challenged financially and that this would affect their ability to fly, which would be dependent on their personal financial situations. The participants in this immediate category considered that the price of air travel was a major factor in the decision-making process of baby boomer travellers, and thus the airlines were required to extend better airfares to the market in general (not just baby boomer travellers).

'*The airlines work on the principle that people will pay for quality rather than travel on price, which is wrong. People travel on price*' (Baby Boomer Travel Insurance Broker);

'*The industry will have to give more flexibility to travellers as people become more money-bound rather than time-bound to travel*' (Baby Boomer IT professor).

4.3.5 Changing consumer options

Table 4.6: *Changing consumer options* categories & participant concurrence

Categories	Participant concurrence
Adventure tourism	AP1, TI3, TI4
Changing destination choices	AP1, BB3, BB4, CO2, TA1, TA3, TB3, TI1, TI2, TI5, TO2, TO5, TO6, TO7
Destinations demand dependent	AP2, AP3, AP4, TA1, TB1, TB2, TB3, TI3, TIC2, TO1
Increasing reliance on airlines	C1
Non-air transport alternatives	AP3, BB4, TA1, TI1, TI5, TO4
Rising competition	TA1, TB2, TI5, TO3

Source: Developed for this research

- Adventure tourism

Three participants identified adventure tourism as a future travel trend for baby boomer travellers, due mainly to financial affordability. In this category, the few participants depicted baby boomer travellers as adventurous and unhindered by the financial costs of such travel experience. Indicative quotes from the participants of this category included;

> '*Regardless of age travellers in 10–15 years will be more adventurous partly due to affordability. People will be more willing to travel to more non-traditional older destinations such as Bali and Fiji*' (Airport Corporate Affairs Manager);

> '*Destinations have to change for airlines to attract baby boomers … Alice Springs is a good destination for baby boomers due to the adventures available*' (Tourism Council General Manager).

- Changing destination choices

Related to the category of *adventure tourism*, 13 participants postulated that baby boomers in future years would have more choices of destinations which they may fly to and in which

destinations demanded would alter in comparison to those destinations which the travellers are travelling to now. There were variations and contrasts between the participants as to specific destinations which could be included in such choices, and some didn't specify destinations but activities. For example, some participants considered baby boomer travellers in the future would be more attracted to beach destinations such as Bali and Fiji, whilst others contended that Asia was more in the thinking of baby boomer travellers, with experiences such as river cruising on the Mekong River. Some participants theorised that baby boomers would in future fly on shorter trips, which may imply trips of shorter duration or shorter distances from regular travellers' domiciles; either of which would give the airlines more opportunities to fill seats. Another suggestion was that Russia and South America were looming destinations. Indicative quotes are as follows:

> '*The travel requirements of baby boomer travellers will be different in 10 years*' and that '*people will be more willing to travel to more non-traditional older destinations such as Bali and Fiji*' (Airport Corporate Affairs Manager).
>
> '*The ageing population has changing requirements … over 55s don't want to lie on beaches or go shopping, they want experiences*' (Tourism Lecturer).
>
> '*There's an under supply of airlines to South America. More direct Australia-South America flights are required. South America is underserviced, this is an area of opportunity, Baby Boomers are curious of South America*' (Tour Operator Marketing Manager).

Discussion regarding destinations also encompassed domestic travel within Australia in which there was also discussion that domestic travel to cater for the baby boomer market during

times of a strong Australian dollar (which meant more expensive international destinations) was required;

> '*Airlines must move out of business destinations which are of zero interest to the retired baby boomers*' and considered that '*Cairns, Gold Coast, Hobart, Adelaide and the regional tourist centres could increase, as opposed the cities like Sydney, Melbourne, Brisbane*' (Tourism Council CEO).

- Destinations are demand-dependent

Whilst none of the participants of this immediate category directly related destinations which airlines fly to, to the baby boomer generation of air travellers, they did stipulate that airlines would fly to the destinations demanded by air travellers in general. There was also consideration that destinations in general would not change, however there could be shifts in destination demands over time, especially to destinations which could offer more cultural experiences. A general consensus within this this category was that the civil aviation airlines would always monitor trends in the market and they would only travel to high-yield destinations.

> '*Airlines will fly to where passengers wish to go and they [the airlines] make money. There's nowhere in the world you can't get to. There's not a shortage of places they fly to, this is not a constraint*' (Airport General Manager);

> '*The airlines will fly to high-yield destination … destinations won't change … the consumer will decide where they wish to go … airlines may change to destinations where there's better yield; destination demand may shift*' (Airport Corporate Affairs Manager).

- Increasing reliance on airlines

In this category, the sole cruise operator explicated the importance of airlines servicing airports where cruises depart or arrive. She resolved that cruise lines have an increasing reliance on airlines to transport passengers to airports close to cruise ports. She, of the baby boomer generation herself concluded;

> '*… more cruise-lines are home-porting, for example more ships to Europe, Europeans are not required to fly far to connect to cruises … airlifting can be a challenge getting passengers to cruise ports*'.

This category was extracted from an interview with 1 participant, the cruise operator and is not considered a major point.

- Non-air transport alternatives

There was a consensus amongst 6 participants that baby boomer travellers would have available to them more non-air transport modes, which they could exercise. Here, the participants postulated that because of some factors in which baby boomers were being inconvenienced (such as increased security measures and reduced airline ground staff at airports to assist with check-in and baggage handling), they would consider other methods of transportation for their travels, such as caravanning, train and coach travel and cruising. For those baby boomer air travellers who would fly, consideration for air travel would tend towards the fully fledged airlines and not the LCC's. There was even contention that if train travel were more extensive around Australia, baby boomer travellers would prefer that method of travel. Below are 2 examples in which participants respectively stressed that increasing security procedures at airports and taxes were pressuring baby boomer travellers to leave air travel and seek forms of ground travel instead;

'*It's not a pleasant way to travel for baby boomer people. They're getting fed up with security arrangements … the growing security annoys them. They'd prefer ground travel. On number there is growth. This will continue at 4% annually for Australians for the next 20 years. The demand could be higher if the experiences were better. Prices are not the mitigating factors, security is draconian even though that is how it has to be. Passengers don't like self-check-in, this is an unpleasant experience … The VFT's – Very Fast Trains – once they get established in Australia will compete with airlines … 300 000 retired baby boomers are on the road in Australia on any one day. They have made choices about how they spend their dollar. They use campervans as opposed to planes*' (Tourism Industry Association CEO).

'*Sustainable fuel is the major issue for airlines as well as greedy government taxation. This will affect the number of travellers, in the long term. People will give up on travel due to these taxes. People are wealthier in higher age and will consider other forms of travel due to taxes. There's elasticity and if these costs go up, people will reconsider air travel*' (Tourism Industry Association CEO).

- Rising competition

Participants in this category deliberated that rising competition would lead on to increased choices for baby boomer air travellers, especially in regards to the choice between flying on a fully-fledged (or *legacy*) airline such as Qantas, or on an LCC such as Tiger Airways. The advent of LCC's and their increasing prevalence is viewed as the impetus for cramped seating on flights as the LCC's compete in the market, in which airfares are kept low and in which more destinations could develop. This leads to the requirement that airlines offer consumers better services, especially baby boomer travellers, as explicitly stressed by a State Tourism Manager;

'*Airlines are driven by the demand for particular destinations … They are continually monitoring trends and needs … It is a very competitive industry, the airlines that provide the best service to an ageing population will win more business. This is an organic survival of the fittest evolution that is market driven … due to highly competitive industry, airlines need to continually be looking for better service*'.

4.3.6 Natural population growth

Table 4.7: *Natural population growth* categories & participant concurrence

Categories	Participant concurrence
Skewed market	BB2, TB1, TB3, TI1, TI3, TO1, TO5, TO6
VFR travel	AP2, TB3, TA3, TIC1

Source: Developed for this research

- Skewed market

There was general consensus amongst the participants of this immediate category that the number of baby boomers travelling by air was growing, with some participants even quoting figures. Participants related the growth in baby boomer air traveller numbers with the requirement that airlines improve their services in order to maintain and grow patronage. Particular was the consensus that LCC's must improve comfort especially cramped seating conditions on aircraft, as well as security procedures at airports. There was also discussion about airlines becoming more flexible in selling their seats and not maintaining rigid fare conditions.

When asked about the impacts which a growing number of baby boomer travellers could bear on the civil aviation industry, one participant depicted an example of potential growth in tourism to central Australia, in which he stressed the importance of increased infrastructure to meet the growths;

'*It's going to be astronomical. Over the next 10 years, 4 million will be retired, currently 2 million. A number of people will take opportunities to travel domestically. For the airlines this will be critical especially for a tourism town like Alice Springs. Alice Springs itself needs to grow along with transport modes … We require the ability to service more arrivals which could be expected from baby boomers should they travel more*' (Tourism Industry Association General Manager).

- VFR (visit friends and relatives) travel

There was a view amongst the participants of this category that VFR travel could be part of the reason why baby boomers would be travelling by air more, as they have family members all around Australia, thus the dispersion of Australian families acts as an impetus for baby boomers in which air travel is required for such transport in order visitations be effected.

'*Baby boomers would possibly impact the aviation industry, e.g. traditional grey nomads, the more fly/drive … families are much more geographically dispersed. Baby boomers will be travelling around to visit families because of geographical dispersion*' (State Tourism Bureau Executive).

4.3.7 Cohesion between the tourism industries

Table 4.8: *Cohesion between the tourism industries* categories & participant concurrence

Codes/Categories	Participant concurrence
Destinations involvement	TB1, TI3, TI4
Instrumentality of travel agents	TO6
Willingness to partner	C1

Source: Developed for this research

- Destination involvement

Three participants considered there was an importance for tourism industries' stakeholders at airlines' destinations, to become more demanded by travellers for airlines to operate to. There was a concern that the destinations (local operators, marketers, hotels, tourism councils and associations etc.) themselves were letting the airlines down with regard to lack of services, such as a shortage of hotel rooms or local infrastructure. A further problem identified was the lack of labour in the tourism industries, at the destinations. The consensus was that services at destinations should be more involved, so as to gain the confidence of the air traveller market. Examples of these concerns are discussed;

> '*Airlines may be frustrated with destinations, but the destinations may be letting them down. Example, an airline decides to fly to Alice Springs and then finds lack of accommodation for travellers. Airlines won't build a motel … destinations have got to work their part more*' (Tourism Industry Association General Manager);

> '*If a destination is not providing well for clients, this will affect demand on airlines flying to those destinations … this could lead to serious implications for marketers in Australia where there is a labour shortage in tourism, who then have to be empathic to baby boomer travellers*' (Tourism Industry Association Managing Director).

- Instrumentality of travel agents

The travel agency managing director expressed the concern that the airlines are targeting baby boomers through direct mediums, such as online marketing and stressed that the baby boomers who book through travel agents were actually a majority. Through travel agents, this participant (himself a baby boomer) expressed that the airlines could gain a more resolute understanding of baby boomer air traveller requirements.

'*Frankly, the airlines are not hearing the points of view of agents, they're only interested in survival. Even in travel booms, airlines are reluctant to send sales representatives to agents, they visit when it's quiet. Baby boomers are mainly booking through agents, the airlines need to access baby boomers. The airlines are not listening to the needs of the baby boomer market, the baby boomers who book through agents are a majority*'.

This category was extracted from an interview with 1 participant and thus is not considered a major point.

- Willingness to partner

The cruise operator participant expressed concern that airlines operated too few flights to service airports close to sea ports, through which cruise travellers could fly to or from, to connect to or return to cruise voyages. However, She did advise that Qantas and some cruise operators did forge ties in which baby boomer travellers, a sizeable market for the cruises, appeared to be targeted in marketing campaigns. In this, the participant considered that the airlines and cruise operators would;

'… benefit each other, example Qantas and Royal Caribbean Cruises … as a cruise line we find it hard sometimes to get clients airlifted to [cruise] ports … more cruise lines are home-porting e.g. more ships to Europe, Europeans are not required to fly far to connect to cruises … airlifting can be a challenge getting [passengers] to cruise ports'.

This category was extracted after an interview with 1 participant and is thus not considered a major point.

4.3.8 Recognition of opportunities

Table 4.9: *Recognition of opportunities* categories & participant concurrence

Categories	Participant concurrence
Increasing baby boomer numbers	BB3, BB5, TB1, TB3, TI1, TI3
Research	TA2, TB2, TI5, TIC1, TO1, TO3, TO6

Source: Developed for this research

- Increasing baby boomer numbers

Three participants discussed an increasing prevalence of baby boomer air travellers, in which airlines could economically benefit. The participants believed that the airlines could economically benefit from the growing number of baby boomer air travellers, however there were varying opinions with regards if the airlines themselves recognised this. Sample extractions were as follows;

> '*Over the next 10 years, 4 million will be retired … a number of people will take opportunities to travel domestically … for the airlines this will be critical …*' (Tourism Industry Association General Manager);

> '*On number there is growth. This will continue at 4% annually for Australia over the next 20 years. The demand could be higher if experiences were better*' (Tourism Industry Association CEO);

> '*Airlines need to appreciate that baby boomer travellers are a majority*. *Airlines must attract that audience which is in a majority. If not, they'll lose out … they'll suffer if they don't*' (Baby boomer public servant).

- Research

Five participants stipulated the importance of research for the airlines in understanding demographics amongst air travellers. The participants believed that the airlines were aware of the baby boomer market as a growing and affluent one and that the airlines were acting on the data from those statistics. However, for airlines the actual yield is of greater importance than the volume of travellers, in which case the ageing population is a more wealthy market, from which airlines may increase yield. Research is required in order that airlines are able to determine traveller requirements and thus, gain patronage regardless of the airfares sold to the market. Some participants stressed the importance of the airlines as being required to increase future market research to better understand their markets. A further opinion resolved that the airlines required more contingency planning in order to understand what could go wrong with baby boomer travellers, with more customer research. Examples of responses;

> '*[Airlines) recognise this strongly. They are working towards it and marketing it. The demographic/statistical information gives strong information regarding the market. The airlines are aware of how they need to get the best from their market*' (Senior Tourism Lecturer);

> '*The airline understanding of the market is better developed than other consumer industries due to the tools they use, like profiling and research, and the way they link advertising to their destinations and the profiling of customers. Airlines understand what customers are looking for*' (Tourism Industry Association CEO).

> '*Most airlines continually analyse their markets. Due a highly competitive industry airlines need to continually be looking for better service … the larger a market, the more the airlines will look to serve it*' (State Tourism Bureau Manager).

4.3.9 Increased demographics recognition

Table 4.10: *Increased demographics recognition* categories & participant concurrence

Categories	Participant concurrence
Increased attention for baby boomer travellers	AP3, CO2, BB1, BB2, BB3, TA3, TB2, TI4, TO3
Increased proactiveness	AP1, AP2, BB1, TA3, TIC2, TO6, TO7
Seniors airfares	BB2, TO7

Source: Developed for this research

- Increased attention for baby boomer travellers

A total of 9 participants contributed to this category, in which they stressed the importance of airlines rendering more attention to the baby boomer travellers. The contention was that airlines could focus a little less on younger travellers (which participants considered the airlines did too much of) and render more attention to the more baby boomer and affluent travellers, which could provide the airlines with more high yield. Participants concurred that the airlines were required to be more responsive to the needs of baby boomer travellers and those that wouldn't, won't last.

> '*Airlines need to be more responsive to an ageing population … baby boomer travellers are more affluent than younger travellers … airlines need to appreciate that baby boomer travellers are a majority*' (Baby Boomer Public Servant);

> '*Throughout society, because of the growing proportions of baby boomer people, activities will be driven by more conservative baby boomers … as people get older, foci turn to older people. Change is reflecting on the perceived purchasing power of baby boomer people*' (Tourism Associate Professor).

- Increased proactiveness

The concerns here were that airlines are not planning contingencies for baby boomer air travellers, even should they recognise this market. Without actually identifying airlines, participants in this category expressed doubt that airlines were being proactive in addressing the growing baby boomer market and its potential requirements (such as comfort, aircraft access facilities, internet social sites, niche products such as higher classes of service, to name a few) in comparison to other markets. Participants consider that airlines view that load factors are the dominant factor and that airlines should start to more consider the affluent markets including baby boomers.

> '*One or two airlines are very proactive … there seems to be little evidence of other airlines being proactive – not through trade advertising, nor consumer communication*' (Tour Operator Manager).

- Seniors' airfares

There was some consideration that the application of seniors' airfares could be an important tool to recognise the baby boomer market is that of seniors' airfares. Within this there could be more flexible pricing where baby boomer travellers could be offered lower competitive airfares during low season in which airlines could better fill seats along with the addition of extra capacities on certain routes frequented by baby boomer air travellers, which could be offered well in advance to ensure seats are filled. An indicative quote is as follows;

> '*More flexible pricing [required] … more recognition for baby boomers during low seasons … [addition of] extra capacity to certain routes, offer cheaper fares to the baby boomers well in advance*' (Baby Boomer IT Professor).

4.3.10 Seniors-only flights

Table 4.11: *Seniors-only flights* categories & participant concurrence

Categories	Participant concurrence
Seniors-only flights demand dependent	AP4, BB5, CO2, TI3, TIC1, TO3
Seniors-only flights not viable	AP2, BB1, BB2, BB3, BB4, CO1, TA1, TA2, TA3, TB1, TB3, TIC2, TO2, TO4, TO6
Seniors' charter flights possible	AP1, AP3, C1, TB2, TI2, TI4, TI5, TO1,

Source: Developed for this research

- Seniors-only flights demand-dependent

Six participants conjectured that seniors-only passenger flights could only be dependent on demand for such services, however, should such demand exist it would be a possibly viable venture for the airlines to undertake. One participant even related such a venture with tour operators conducting ground tours for baby boomer travellers. However, the consensus was that such a venture would only be viable if there was a sufficient demand for it. For example;

> '*… is a potentially growing market, it would be viable for some smaller carriers or any potential entrant/entrepreneur in the market, [however] the current airlines don't have the fleet or staff services to take care of the ageing market solely, unless there's a demand to keep aircraft in the air constantly*' (Airport Corporate Affairs Manager).

- Seniors-only flights not viable

Fifteen participants, almost half the participants of this research concurred that seniors-only flights would not be viable for the airlines to operate. The general consensus amongst the participants of this category, was that baby boomer travellers did not wish to be classed as *old* and the many of them were actually young-at-heart travellers seeking fun and adventure. There was also the postulations that it was not ethical to categorise the markets and that it was imperative that the airlines mix their markets of air travellers.

'*No. Definitely not, because younger people don't want to travel with seniors. Perhaps special purpose charters for seniors*' (Tour Operator Owner);

'*I don't think so. Airlines have to market for the whole market. Airlines can't benefit greatly by doing this like tour operators. They can attract that market by doing something that will entice the higher age bracket to consider flying with the [particular] airline*' (Baby Boomer Public Servant);

'*An awful idea*, *people travel with the idea of being young*. *No baby boomer would want to be amongst older travellers*' (Senior Tourism Lecturer).

- Seniors' charter flights possible

Eight participants considered that seniors' charter flights were possible for airlines to operate, but not as regular scheduled services. The main reason for this was the baby boomers did not want to be categorised as old but wanted to be part of the extended air travellers community, regardless of age. The idea of charter flights would be for baby boomer air travellers to fly with special interest groups, in which such operations were happening outside of Australia, namely the United Kingdom. The responses in regards to seniors' charters were brief, though they were made by 8 participants. Such responses were given alternatives to *seniors' only flights*, as asked in the IQ's. Such responses included;

'*… some charters for seniors, but not scheduled service*' (Tourism Association MD);
' *… perhaps special purpose charters for seniors*' (Tours Operator Owner);
'*Themed charters, may be …*' (State Tourism Bureau Manager).

4.3.11 Seniors' airline subsidiary

Table 4.12: *Seniors airline subsidiary* categories & participant concurrence

Codes/Categories	Participant concurrence
Seniors' airline subsidiary demand dependent	AP4, C1, TO3, TI1, TI3
Seniors' airline subsidiary not viable	AP1, AP2, BB1, BB2, BB3, BB4, CO1, CO2, TA1, TA2, TA3, TB1, TB2, TB3, TI2, TI3, TI4, TI5, TIC1, TIC2, TO1, TO2, TO4, TO5, TO6, TO7

Source: Developed for this research

- Seniors' airline subsidiary demand dependent

Five participants considered that the establishing of subsidiaries within airlines to cater for seniors only would be subject to the demands for such a product, especially given that the baby boomer travellers may wish to travel without the presence of children interrupting their enjoyment.

> '*This would depend on the cost-benefit analysis from the customer's point-of-view. Are the benefits of the flight worth the extra cost? It would mean determining if enough baby boomers would be interested in using the subsidiary to warrant establishing the service*' (Tour Operator General Manager);

> '*I think it would be a smart idea. Interesting ploy and is worth a try to target the baby boomer market. Baby boomer travellers want to avoid so many kids and drunken football teams. Baby boomer don't want 5-star service nor do they want back-packer quality. This could be a good model for the airline industry*' (Tourism Industry Association general Manager).

- Seniors' airline subsidiary not viable

For varying reasons, 25 participants (the majority of the total participants in this research) challenged that the founding of seniors' airline subsidiaries would not be a viable option.

Similar to the response of the category of *seniors-only flights not viable* under the code of *seniors only flights*, participants in this category theorised that airlines require all air traveller demographics to ensure the success of their organisations and that baby boomer travellers themselves would not desire such products. Furthermore, the formulation of such products could serve to categorise baby boomer air travellers to the extent that they become outsiders to the air traveller market, which baby boomers would themselves oppose, especially given that many of them prefer feel younger and not older.

> '*I don't think so. May be the odd specific journey but not on a permanent basis. The airlines would not benefit greatly from this*' (Baby Boomer Public Servant);
>
> '*No, this would not make any economic sense. Why shouldn't airlines then only have subsidiaries for people of tall height or Asian people? This would lead airlines out of business. Airlines must bunch travellers regardless of age etc. and make passengers as comfortable as possible*' (Tour Operator Owner);
>
> '*Baby boomers don't want to be categorised as an older group … baby boomers will travel as interest groups but not as age-groups*' (Tourism Industry Association General Manager);

4.3.12 Technology

Table 4.13: *Technology* categories & participant concurrence

Categories	Participant concurrence
Check-in processes	AP1, AP2, AP4, TA1, TB2
Social media sites	TIC2, TO7
Technology improvements	AP2, BB2, TIC1, TO1, TO3

Source: Developed for this research

- Check-in processes

Four participants theorised the future conveniences of an increased prevalence of automated self-check-ins for baby boomer travellers. It was postulated that check-ins could eventually be entirely self-service. There was also cogitation that self-service technology could be of benefit to ageing customer bases.

> '*[There would be] much reduced check-in counters. [There should be] drop off facilities for baby boomers who are not tech-savvy. Some airlines don't have check-in counters in Europe, check-in is online or mobile phones. Some face-to-face contact starts when boarding flights … Technology changes are always happening. Airlines are always catching up with technology. Baby boomers may not have to think about this. So many services will be touch-screen. Technology will dictate how we're handled at airports, including check-in, luggage, security etc.*' (Airport General Manager).

> '*It won't be long before there are no check-ins at all, it will be almost totally self-service*' (Senior Tourism Lecturer).

However, in contrast there was some consideration that the increasing prevalence of self-service technologies would benefit baby boomer travellers;

> '*Ability to handle technologies, example check-in; many of the changes that airlines are making to make it simpler for their customers will automatically benefit ageing customer bases*' (State Tourism Bureau Manager).

- Social media sites

There was postulation amongst participants that airlines should be marketing to baby boomer travellers through airline websites and online blogs through which it was considered that baby boomers carryout social networking. Indicative quotes from the interviews are as follows:

> '*Baby boomers are more tech-savvy. The baby boomers are more aware of technology. Airlines seem to think that baby boomers are not tech-savvy. Baby boomers are a growing voice on the likes of airline websites and airline blogs. They use social sites to share experiences. Airlines need to be aware of this. They need to be aware of such sites, example specials on Facebook*' (Travel Insurance Marketing Manager);
>
> '*The airlines could see value-added service in marketing via social media like twitter*' (Tour Operator Marketing Manager).

- Technology improvements

Participants considered that baby boomers were more IT literate than the airlines considered them to be, therefore the airlines should be making IT processes easier for baby boomers to work with, example online payment processes. It was considered that this savviness was on the increase amongst baby boomers, including the use of IT amongst baby boomers to surf their family genealogies, after which they plan their trips to those destinations, online. Examples for this category include;

> '*Websites have to be more user-friendly. Example, when trying to book a US-Europe flights, I could not process the payment because my European-based credit card was being used on the US-based airline site. I had to rebook on the European-based site. This was technically irrelevant. The location of the website should not be an issue for credit card payments. More information required to assist clients*' (Baby Boomer IT Lecturer);

'*It seems that baby boomers are increasingly using IT more in which they book their flights. They're more IT savvy than in the past*' (Tour Operator General Manager).

4.3.13 Aviation security

Table 4.14: *Aviation security* categories & participant concurrence

Codes/Categories	Participants' concurrence
Artificial body parts	AP1, AP4, BB1, BB4, BB5, TA3, TB3
Increased security regulations	AP2, AP3, BB2, C1, CO1, TA1, TI1, TI5, TO3, TO4, TO5, TO6, TO7
Security over-applied	BB2, C1, CO1, TA1, TO3, TO7, TI1
Streamlined security	AP1, AP3, C1, TA2, TI2, TIC1, TIC2

Source: Developed for this research

- Artificial body parts

Several participants raised concerns with regards to the increased prevalence of artificial body components in baby boomer travellers and thus cautioned that this could in parity lead to security issues at airports. There was concern amongst the participants of this category that the increasing security procedures could single out more baby boomer travellers who are more likely to have metal body parts, such as metal hips. There was a call for more dignified security processes. Indicative quotes are as follows:

'*The potential for metal body parts may increase with baby boomer travellers' increase [in numbers]*' (Baby Boomer Insurance Broker);

'*Security is a pain and getting worse. People are resenting this more especially those with hip replacements. This puts people off when buzzers noise*' (Baby Boomer Catholic Nun);

'*Perhaps there are some issues like people with hip transplants, beeping signals at security points … As people age, they may forget where they're going. They may not hear messages and announcements*' (Tourism Associate Professor).

- Increased security regulations

A total of 6 participants postulated that civil aviation security arrangements will further develop and in which regulations will further tighten. There was contention that these increasing security measures could affect baby boomer travellers to the extent that they may decide not to fly because of intrusive security measures at airports, such as frisking and removal of clothing and shoes and turn to other modes of travel, apart from flying. There was also postulation that security arrangements are over-applied and that the majority of air travellers were being subjected to extreme security arrangements, for the sake of a few potential offenders. There was also a concern that smaller regional airports would be required to tighten security in which non-jet airlines may have to increase security measures to the standards applied by international airlines at the major airports. Some participants ridiculed aviation security measures, for example;

'*Baby boomer travellers are more intelligent than airlines staff and airport security. Sharp instruments can still be taken on-board. Ritualistic nature of current security procedures seem to be for show, example removing shoes, belts, opening laptops, it's over-done. Terrorists are not bombing TGV [fast] trains in Europe which carry 600 plus passengers, onboard which passengers can take suit cases, unchecked*' (Baby Boomer IT Lecturer);

'*Jewelry and knee replacements will be questioned, full boding scanning could bear negative impact on the ageing population who could decide not to travel due to this difficult process. Baby boomer travellers could then turn to more domestic travel and do more camper-vanning. Security is frustrating, constant streams of "belts-off, laptops*

out" … with baby boomers travelling more with more wealth this could be a problem' (Airport General Manager);

'*It is important for ground staff tendering to security to be empathetic, some security staff are more empathetic to travellers more than others … security staff will need to be more trained in medical conditions such as mobility issues*' (Tourism Industry Association Managing Director).

- Streamlined security

Participants stressed an importance that airlines apply more streamlined security procedures to ease security queues at airports, whilst others in this category considered that such would eventuate given the increasing technologies utilised in airport security, namely body scanners, in which processing times for security procedures could increase and thus bear effect on airport operations. There was even a suggestion for an over-50's screening area, due to the belief that baby boomers are a low risk category of air travellers.

'*Express immigration and security screening is required, this is controversial … baby boomers are a lower risk. Perhaps an exclusive over 50s screening area. Baby boomers feel insulted being treated like younger passengers. Baby boomers hate pat-downs. Airlines need to focus on demographics and search more of those who are more likely to be threats*' (Travel Insurance Marketing Manager).

'*Difficult to know where security is going in general. Body scanners are not far. Pacemakers and artificial joints would slow down processes. This will increase if we keep current technology. Technology is moving rapidly. Hopefully future systems would compensate*' (Airport Corporate Affairs Manager).

4.3.14 Marketing practices

Table 4.15: *Marketing practices* categories & participant concurrence

Categories	Participant concurrence
Amended marketing practices	AP1, AP2, AP3, AP4, BB3, BB5, C1, CO1, CO2, TA1, TA2, TB1, TB2, TB3, TI1, TI2, TI3, TI4, TI5, TO1, TO3, TO5, TO6, TO7
Digital applications	BB2, BB4, C1, TIC2

Source: Developed for this research

- Amended marketing practices

The majority of the participants of this research, 24 of 32 participants considered that airlines should factor the demographics of air travellers more in their marketing processes. There was consensus that the airlines focused too much of their marketing campaigns on younger travellers and business travellers, and that they should render increased focus on the baby boomer markets, which participants considered is a higher yield market for the airlines. Furthermore, baby boomer travellers should be the subjects of advertising within marketing campaigns, example older couples in airline advertisements. Some participants however, considered that airlines would change as per their changing markets, including the baby boomer cohort of air travellers. Suggestions included the marketing of second honeymoons and travel experiences for baby boomers, which would entice them to travel by air. Ad rem to this immediate category are some indicative quotes;

> '*Airlines are short term focused, they don't factor these demographic issues for the future. They should change, they should consider where they market. Airlines may need to start looking at a more diverse form of marketing. Example, airlines need to consider demography when marketing*' (Airport Corporate Affairs Manager);

> *'They're too focused on younger independent travellers. The airlines could concentrate a little more on the older market. There is a higher yield market for them* … they s*eem to*

be targeting the younger travellers … they're not targeting baby boomer people for business … they should not lose sight of the traditional markets' (Airport General Manager);

'*[Airlines] must attract the audience which is in a majority, if not they'll lose out… they need to appreciate that baby boomer travellers are a majority*' (Baby Boomer Public Servant);

'*Airlines are going to have to market to baby boomer travellers*. *Airlines have to get into the psyche of the baby boomer traveller to understand their requirements. Airlines need to understand what experiences baby boomer travellers require*' (Tour Operator General Manager).

- Digital applications

A total of 4 participants expressed optimism that baby boomer travellers are gaining confidence and competence in the use of digital applications for the purposes of booking and managing their air travels. Baby boomers were confident to not only complete and manage their bookings online but also in sharing their experience on online portals such as Facebook. E-services could become more personalised as this trend grows in which there would be reduced reliance on the services of travel agents, permitting airlines to develop more directly personalised rapport with the baby boomer travellers. Thus, baby boomers would communicate to each other and influence each other through such electronic mediums. The internet would be a vital marketing medium, example:

'*Marketing is altered through use of the internet. Baby boomers have responded well to the use of the internet … baby boomers are steering away from agents … They can*

compare prices and airlines. Agents are not as helpful as they used to be' (Baby Boomer Catholic Nun).

'*The baby boomer generation is more media savvy. So many Facebook users will go into this generation … baby boomers tell each other things through internet sites … airlines are missing a major opportunity*' (Travel Insurance Marketing Manager).

4.4 Discussion

Section 4.3 analysed the participant responses through the process of open-coding. What has been uncovered as a result of the open coding is a mixture of views in regard to the overall research question. These responses from the 32 participants also demonstrate variations in agreement (or otherwise) with the literature findings and data propositions developed discussed in Chapter 2. Following is a brief summary of data propositions which have been extracted in chapter 4 and will be subject to further discussion and analysis in chapter 5:

- There were divergences in the views of participants in a number of codes and subsequent categories, such as self-service technologies (where some participants believed that baby boomers were adept with IT use and others postulated otherwise) and the financial capabilities of baby boomer air travellers (in which some participants stressed that baby boomers were financial capable to pay for higher quality services and other participants cogitating otherwise);
- Concerns with increased security measures at airports in which baby boomers with artificial body parts would subject to greater scrutiny of security staff and in which security queues could lengthen;

- The importance of increased aviation medicine training for air crews beyond current training and in which more equipment such as defibrillators could become mandatory along with the provision of compression stockings;
- Cruise line operator concerns that airlines may not be able to service airports close to cruise ports efficiently enough to deliver and collect cruise passengers to and from ports;
- The increasing popularity of premium economy class as a relatively newer class of travel as an option to move away from congested economy class seating without the requirement to upgrade to business or first class travel;
- Airlines could be applying more seniors' airfares could be used a marketing tool to promote air travel products to baby boomer travellers.

This chapter has presented these results in detail due to the wide range of responses. Chapter 5 will serve to draw clear answers to each research question.

4.5 Chapter summary

Chapter 4 analysed and coded the data rendered by the 32 Australian tourism industry participants who participated in the in-depth semi-structured interviews which served as the data-collection method for this research.

Chapter 5 will further identify the main codes and categories of data according to the industries that make up the tourism sector. Chapter 5 will also identify limitations and omissions of the research and reach conclusions for each of the research questions as well as over-arching conclusions to the research as a whole.

CHAPTER 5

DISCUSSION & CONCLUSION

5.1 Introduction and structure of Chapter 5

Chapter 1 of this thesis introduced the research question:

"*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"?

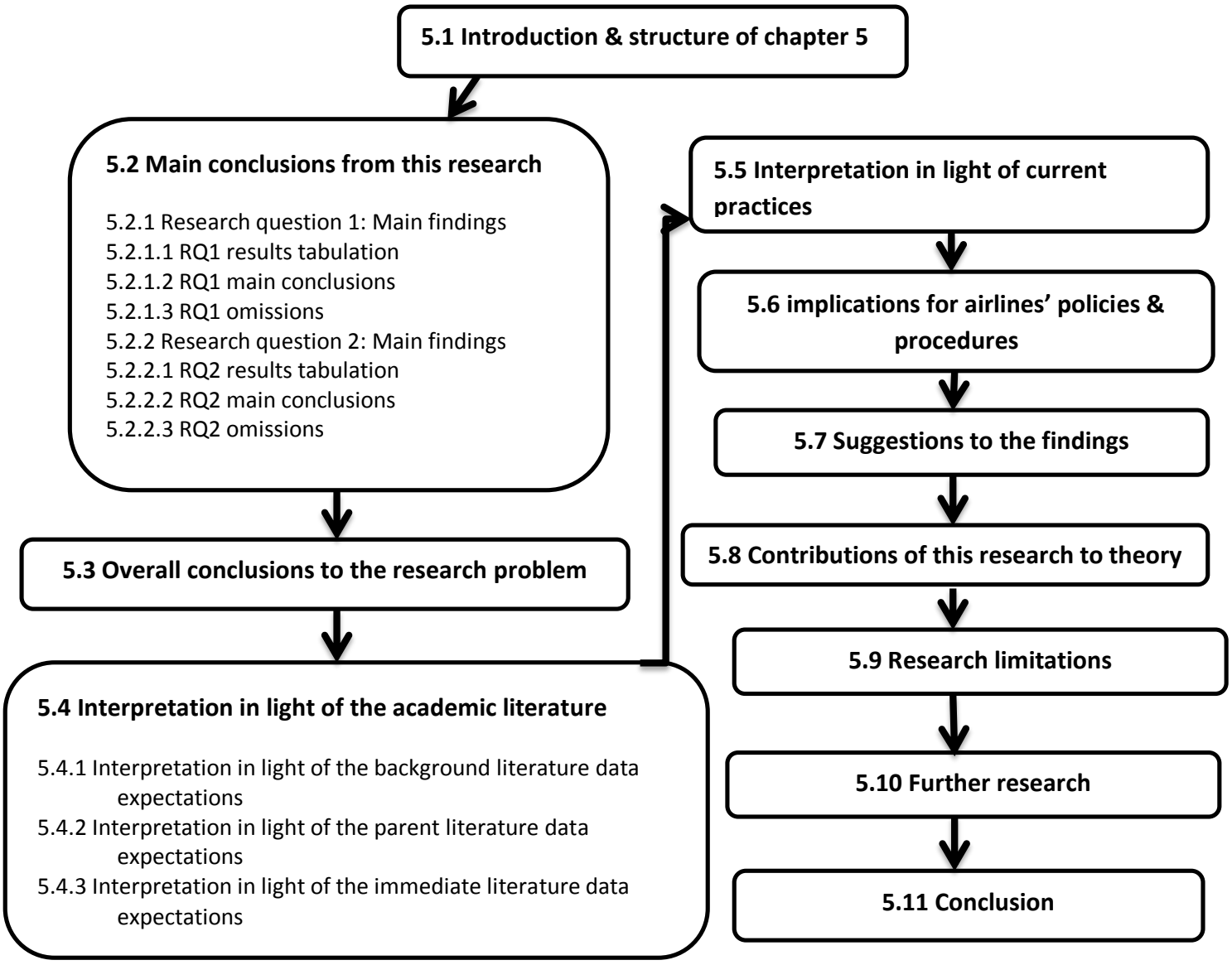
Chapter 2, the literature review, discussed the parent literature, background literature and immediate literature related to the research question. It concluded that despite tourism's significance to the Australian economy there is a dearth of academic literature about the perceptions of the Australian tourism industry stakeholders regarding the readiness of the airlines to handle the growing number of baby boomers travelling by air. This is a significant gap, considering civil aviation's importance to tourism, and the growing affluence of baby boomer travellers and their emerging propensity to travel by air.

Chapter 3 discussed various quantitative and qualitative research methodologies and designs and justified the use of in-depth interviewing in which deductivist-inductivist analysis was applied as the sole data-collection method in this purely qualitative thesis. Chapter 4 presented and analysed the main findings of the data collected across the nine stakeholder groups which were used for the purposes of interviewing and data-collection.

Chapter 5 will discuss the main conclusions drawn from the findings discussed in Chapter 4, by cross-analysing the data drawn from the participants of eight industries of the tourism sector as well as the baby boomer participants. Furthermore, this chapter will identify and discuss any

perceived limitations in the responses rendered by the participants as well as any omissions made in the responses from the participants, in comparison to literature review findings, and vice versa. Figure 5.1 depicts the structure of Chapter 5.

Figure 5.1: Structure of chapter 5



Source: Developed for this research

5.2 Main conclusions from this research

This thesis sought the perceptions of various Australian tourism sector stakeholders with regard to the readiness of the airlines to handle the growing number of baby boomers flying. In-depth semi-structured interviews were conducted (face-to-face and by telephone) with 31 participants and the remaining participant chose to type the responses and e-mail the answers. This meant that 32 participants (*n*=32) became the research subjects of this thesis.

As discussed in the literature review (Chapter 2), tourism is not one rigid industry, but rather an amalgamation of industries interacting together. This presents a challenge for the airlines in regard to the provision of services to the growing numbers of baby boomers travelling by air in that perceptions towards the airlines vary (as was established in this thesis and as will be further discussed in this section). Furthermore, the complexity of the interacting components of the tourism industries have been confirmed in this research thesis (as will be discussed in sections 5.2.1 and 5.2.2) in which the views of various tourism industries' stakeholders at times varied and even clashed. In addition this complexity was discussed in section 2.3.6 in the literature review in which tourism was identified as a group of industries which interacted.

Furthermore, the presence of so many stakeholders in tourism and the requirements that the stakeholders interact to effect sustainable tourism means that the airlines are under a greater challenge to deliver services to clientele of all demographics. For example, airlines' interactions with ground operators and airports mean that travellers must experience at least two industry stakeholders, including an airline in order to consume tourism services, and this requires air travel. The airline must share the responsibility of ensuring that travellers have received effective service to encourage them to repurchase. Such service would ensure that the personal satisfaction of the baby boomer traveller is achieved and thus, competitive advantage may be

subsequently achieved through the airline being dynamically capable of meeting baby boomer traveller requirements.

This sub-section (5.2) discusses the main conclusions with regard to the main findings presented in Chapter 4. The conclusions to the 2 research questions will be presented as Sections 5.2.1 and 5.2.2. A discussion of all possible conclusions would be beyond the scope of this thesis and the time available for its completion, due to the in-depth textual richness of the data which the inductive-deductive positivist research methodology has uncovered. From what has been extracted, the perceptions of the interviewed participants have been multifarious and for airlines to gain a more protracted knowledge of the research question, more research, perhaps quantitative, would be required. Furthermore, the association of the research findings with the literature findings has been quite complex.

The Chapter 4 findings will be presented in this concluding chapter as themes under each research question (RQ). The themes will be presented as per the codes established in Chapter 4, in which the main categories of the codes will be discussed. After presenting the themes (in RQ1 and RQ2), discussions in regards to the individual conclusions and omissions of each research question are then presented along with a brief tabulation of the respective findings establishing concurrence (i.e. agreement – or otherwise) between the literature and the extracted data of this thesis. Research limitations are discussed in Section 5.9.

The tabulations show whether the findings support the literature fully or partially, or not at all. The reason for this is that this immediate research is adding to the current body of literature. Accordingly, in each table (see Tables 5.1 and 5.3), the final column indicates whether the degree to which the participants' responses (relevant to each associated theme) are in support of the literature (i.e. '*supported*', '*partially supported*' or '*not supported*'). Reference to the literature implies that writers (as discussed in the literature review) have discussed themes which

correspond to themes uncovered (in Chapter 4 of this thesis) and does not imply any concurrence with the participants of this research.

5.2.1 Research question 1 main findings

How does the growing number of baby boomer air travellers impact the aviation Industry?

Research question 1 was presented to the participants via interview questions IQ1 through to IQ6, through which 12 themes manifested. Accordingly, RQ1 will be discussed under the themes of:

i. Changing consumer options;
ii. Demands at airports;
iii. Increased recognition of the importance of demographics;
iv. Cohesion between tourism industries;
v. Lack of recognition of opportunities;
vi. Natural population growth;
vii. Personal resources;
viii. Physical health;
ix. Recognition of opportunities;
x. Seniors airline subsidiaries;
xi. Seniors-only flights;
xii. Service demands.

(i) Changing consumer options

Sixteen participants discussed themes pertaining to the changing options which baby boomer air travellers will have available to them in the future. These included adventure tourism, changing

choices of destinations, lengths of trips, the influences of marketing campaigns, future reliance on air travel, rising competition and the choice of non-air methods of transportation.

Under this immediate theme, only the cruise line participant identified civil aviation as being increasingly relied upon, but the growth of this industry is consistently predicted in the literature, particularly the background literature in which the ATAG (2010), BITRE (2008), IATA (2010) and the TFC (2009) point to civil aviation's importance in the future. The BITRE additionally associated the growth of civil aviation in Australia with deregulation. The relationship between deregulation and new civil aviation competitors was discussed in the parent literature by Bieger and Wittmer (2011), Goll et al. (2008) and Sjögren and Söderberg (2011). Batra (2009) and Patterson and Pan (2007) identified adventure tourism as being sought by baby boomer travellers.

Further concurrence between the literature and the data was apparent in regard to the importance of considering the age demographics of travellers when planning destination marketing (Gitelson & Kerstetter 1990; Glover & Prideaux 2000; Plog 2006). This was further supported by Button and Drexler (2006), Nordin (2005) and Roubik (2002) who highlighted the continued growth in tourism destination choices. However, there was a paucity of discussion amongst the research participants in regard to the options which baby boomer air travellers would have available to them through the prevalence of airlines alliances, as identified by Bieger and Wittmer (2011), Lawton (2003) and Lazzarini (2011).

This theme yielded a *supplemented* finding that tourism industries stakeholders may not be fully aware of the future benefits of airline alliances which are options to baby boomer air travellers.

(ii) Demands at airports

Five participants discussed concerns relating to the requirements of baby boomer travellers at airports including airline staffing, airports infrastructure and access to aircraft.

The BITRE (2012c) highlights the growth in traveller movement through Australian airports. Briones and Nguyen (2007) discussed concerns regarding lowering customer service standards and quality at Los Angeles international airport and along with Hunter and Layton (1986) established that such lowering of standards was associated with deregulation. Additionally, congestion at airports (associated with airport infrastructure) was addressed by Barrett (2004), Cidell (2003), Harrison (2004), Min (1994), Rose et al. (2008) Snowdon et al. (1998), Tien and Sconfeld (2007)and Wolfe (2003). Furthermore, the literature identified the growing tendency of airlines, especially LCCs, to use alternative airports which would mean baby boomers travellers would have to travel greater distances to access air travel (Blackstone et al. 2006; Fournier et al. 2005; Pels et al. 2000; Price 2006). Moreover, de Neufville (2007), Hamzawi (1992), Mazzeo (2003) and O'Toole (2005) associate increasing delays at airports with deregulation.

Whilst the participants expressed concern in regard to the ability of baby boomers to negotiate airport infrastructure and seek airline staff assistance and communication, the topic of deregulation was not discussed by the participants.

A *new* finding in this theme is a lack of understanding amongst the participants in regard to deregulation which potentially affects airlines' airport operations and choice of airports.

(iii) Increased recognition of the importance of demographics

In RQ1, the theme of increased demographics recognition was quite minor in regard to responses from participants, compared to the greater number of responses which the same theme received in RQ2. A tour operator marketing manager considered that airlines could extend seniors' airfares for the older air traveller market. This was not a theme identified in the literature at the time of research. In contrast, what was established in the literature was the argument put forward in this study by the senior tourism lecturer who stated that '*people travel with the idea of being young*' and that '*no baby boomer would want to be amongst baby boomer travellers*'.

Whilst baby boomers were not specifically discussed in the article (BITRE 2008), the importance of customer service skills to meet Australia's changing demographics was established by the BITRE. Moreover, Roy Morgan Research (2005) highlights the growing proportion of baby boomers amongst travellers. Additionally, Purdy et al. (2010), Ravichandran and Suresh (2010), and Tsiotsou and Ratten (2010) found that baby boomer consumers demanded unique products; and Sperazza (2011) and Szmigin and Carrigan (2001) discussed the disposition of baby boomer consumers to consider themselves younger than their actual ages, which was also supported by Muller and O'Cass (2001) who pointed to a difference between subjective and actual age and a consequent impact on attitudes, interests and preferred activities. Seniors' airfares were not discussed by these researchers and writers.

A *supplemented* finding is the introduction of seniors' airfares as a means of recognising the increasing numbers of baby boomers travelling by air.

(iv) Cohesion between tourism industries

One participant discussed the willingness of the airlines to partner with cruise lines when offering tourism products to the market.

The cohesion between the civil airlines and cruise lines, whilst not explicit in the literature (Access Economics 2008; ICCA 2010) is implied, given that the literature identifies cruising as a growing activity especially amongst baby boomer travellers and having named cruising destinations, in which travellers may be required to fly to and/or from cruise ports. Additionally, Showker (2010) discusses the partnerships that have been formed between airlines and cruise lines since the early 1970s.

There are no *new* findings in this theme.

(v) Lack of recognition of opportunities

A total of 20 participants expressed their concerns at airlines' lack recognition of the opportunities regarding the baby boomer air traveller market. Nine of the participants believed that the airlines do not factor age demographics in their operations and 8 thought that the airlines do not consider age demographics at all.

The literature not only established the financial affluence of baby boomer air travellers (Cetron & Rocha 1987; Glover & Prideaux 2008; Muller & Cleaver 2000; Patterson & Pan 2007; TRA 2008; Sambath 2008; Schindler 2005; Szmigin & Carrigan 2001; Xinran et al. 2001), but also the growing prevalence of this age cohort in relation to the overall composition of air travellers (Cleaver et al. 2000; Roy Morgan research 2005).

There are no *new* findings in this theme.

(vi) Natural population growth

Three participants considered that VFR travel could counterbalance the growing age demographics of baby boomer air travellers. Whilst VFR travel was identified by Cleaver et al. (2000), Glover and Prideaux (2010) and Xinran et al. (2001) as bearing some importance to baby boomer air travellers, there was no discussion in regard to the economic benefits to the airlines of this type of travel.

The *new* finding in this theme is the consideration amongst Australian tourism sector stakeholders in regard to the ability of VFR travel to counterbalance the effects of the growing number of baby boomer air travellers.

(vii) Personal resources

The increased financial resources of baby boomers, was discussed by 16 participants. An additional 6 participants considered that the financial resources of baby boomer air travellers were limited. In this theme, the baby boomers and the airport management participants were divided in their views.

As per the theme of lack of recognition of opportunities, in this subsection, the literature establishes the affluence of baby boomer travellers (Cetron & Rocha 1987; Glover & Prideaux 2008; Muller & Cleaver 2000; Patterson & Pan 2007; TRA 2008; Sambath 2008; Schindler 2005; Szmigin & Carrigan 2001; Xinran et al. 2001).

A *new* finding in this theme is the division amongst Australian tourism sector stakeholders with regard to the financial affluence of baby boomers.

(viii) Physical health

Seven participants discussed themes associated with the physical health of baby boomer air travellers. These themes were in regard to the reduced health and mobility (way-finding around airports) and wheelchair facilities at airports.

Caves and Pritchard (2001), Layton (1986) and Wolfe (2003) express concerns with regards to the abilities of baby boomer travellers to move around airports. Briones and Nguyen (2007) further discuss concern in regard to poorly qualified airport staff including wheelchair attendants.

There are no *new* findings in this theme.

(ix) Recognition of opportunities

Nine participants considered that the airlines recognised the opportunities provided by a growing baby boomer air traveller market.

This recognition on the part of Australian tourism sector stakeholders was not highlighted in this theme. Rather, the literature highlighted the need for airlines to recognise the importance of the baby boomer air traveller market, due mainly to their financial affluence (as discussed in the theme of personal resources). Such was established by Cetron and Rocha (1987), Glover and Prideaux (2008), Muller and Cleaver (2000), Patterson and Pan (2007), TRA (2008), Sambath (2008), Schindler (2005), Szmigin and Carrigan (2001) and Xinran et al. 2001.

A *new* finding in this immediate theme is the view amongst various Australian tourism stakeholders that the airlines recognise the opportunities provided by a growing baby boomer air traveller cohort.

(x) Seniors airline subsidiaries

A total of 21 participants considered that subsidiary airlines catering to seniors travellers only would not be a viable option. Another 5 participants considered that this option would be demand dependent. Four participants considered that such a venture catering only to baby boomer travellers would not be desired by those travellers.

Whilst there were no articles in the literature in which tourism stakeholders' views in regard to potential senior airline subsidiaries, there was a concurrence with Sperazza (2011), Szmigin and Carrigan (2001) and Muller and O'Cass (2001) who expound that baby boomers consider themselves younger than their actual ages.

There is no *new* finding in this theme.

(xi) Seniors-only flights

A total of 15 participants considered that seniors-only flights would not be a viable option for the airlines. A further 5 participants believed that such flights could be warranted based upon demand. Another 8 participants postulated that seniors' charter flights were possible.

Whilst Purdy et al. (2010), Ravichandran and Suresh (2010) and Tsiotsou and Ratten (2010) found that baby boomer consumers demanded unique products, there was no discussion supporting the provision of seniors-only flights to and from Australia in response to the growing number of

baby boomer air travellers, nor any discussion of the views of Australian tourism sector stakeholders in this regard.

A *new* finding in this theme is the varying views amongst the participants in regards to the viability of seniors-only flights.

(xii) Service demands

Sixteen participants discussed themes associated with the service demands of baby boomer air travellers. These themes included demands for comfort, luxury, quality, premium economy class and flexible travel conditions.

Comfort was a major finding in the literature, which was discussed by Clemes et al. (2008), Vink and van Mastrigt (2011). Premium economy class was not a prevalent in-depth topic in the literature, however this could be due to the relative nascence of this new class of airline service. Premium economy class was discussed by Kutcha (2007), Mason (2002) and Lee and Luengo-Prado (2004) as being attractive to business travellers. Additionally, spacing and cramped seating conditions were also established in the literature by Brundrett (2001), Fiorino (1999) and Galili and Bass (2002), however, these references were not in direct regard to baby boomer travellers. Ehrenham (2005), in reference to the baby boomer generation, highlighted the importance of aircraft design, which concurs with the comfort and quality demands of baby boomers.

A *supplementary* finding in this theme is the growing prevalence of premium economy class amongst various airlines and its potential attractiveness to the baby boomer market.

5.2.1.1 Research question 1 results tabulation

The analysis of the in-depth interviews for RQ1 data, as presented in Section 5.2.1, unveiled the major findings which are summarised and depicted in Table 5.1. The first column identifies the themes from research question 1. The second column identifies the researchers/writers in the literature who discussed those same themes (i.e. the themes listed in the first column). Finally, in the third column, I state whether the findings of this research are in support of the researchers/writers in the literature, regarding the column 1 themes (i.e. *do the responses given by the participants support the literature findings*? *Is there support concurrence between the literature and research findings of this thesis*? *Or is there no agreement between the literature and research findings*?).

Supported means that the findings of this thesis align with the findings in the literature and therefore, no *new* findings have been established in this thesis. *Partially supported* means that the findings of this thesis supplement current knowledge in the literature, therefore current knowledge is *supplemented*. Finally, not supported, means that the literature findings do not align with the findings of this thesis, therefore a *new* finding has been established.

Table 5.1: RQ1 theme-literature support

RQ1 findings	**Relevant literature**	**Supported/ Partially supported/ Not supported**
Changing consumer options	ATAG (2010); BITRE (2008); IATA (2010), TFC (2009), Batra (2009); Bieger & Wittmer (2011); Button & Drexler (2006); Gitelson & Kerstetter (1990); Glover & Prideaux (2000); Goll et al. (2008); Lawton (2003); Lazzarini (2001); Nordin (2005); Patterson & Pan (2007); Plog (2006); Roubik (2002); Sjögren & Söderberg (2011).	Partially supported
Demands at airports	BITRE (2012); Barrett (2004); Blackstone et al. (2006); Briones & Nguyen (2007); Cidell (2003); de Neufville (2007); Fournier et al. (2005); Hamzawi (1992); Harrison (2004); Hunter & Layton (1986); Mazzeo (2003); Min (1994); O'Toole (2005); Pels et al. (2000); Price (2006); Rose et al. (2008) Snowdon et al. (1998); Tien & Sconfeld (2007), Wolfe (2003);	Not supported
Increased demographics recognition	BITRE (2008); Muller & O'Cass (2001); Purdy et al. (2010); Ravichandran & Suresh (2010); Roy Morgan Research (2005); Tsiotsou & Ratten (2010); Sperazza (2011); Szmigin & Carrigan (2001)	Partially supported
Industries cohesion	Access Economics (2008); ICCA (2010); Showker (2010)	Supported
Lack of recognition of opportunities	Cetron & Rocha (1987); Cleaver et al. (2000); Glover & Prideaux (2008); Muller & Cleaver (2000); Patterson & Pan (2007); Roy Morgan research (2005); Sambath (2008); Schindler (2005); Szmigin & Carrigan (2001); TRA (2008); Xinran et al.(2001).	Supported
Natural population growth	Cleaver et al. (2000); Glover & Prideaux (2010); Xinran et al. (2001)	Not supported
Personal resources	Cetron & Rocha (1987); Glover & Prideaux (2008); Muller & Cleaver (2000); Patterson & Pan (2007); Sambath (2008); Schindler (2005); Szmigin & Carrigan (2001); TRA (2008); Xinran et al. (2001).	Not supported
Physical health	Briones & Nguyen (2007); Caves & Pritchard (2001); Layton (1986); Wolfe (2003).	Supported
Recognition of opportunities	Cetron & Rocha (1987); Glover & Prideaux (2008); Muller & Cleaver (2000); Patterson & Pan (2007); Sambath (2008), Schindler (2005); Szmigin & Carrigan (2001b); TRA (2008); Xinran et al. (2001).	Not supported
Seniors airline subsidiaries	Sperazza (2011); Szmigin & Carrigan (2001); Muller & O'Cass (2001).	Supported
Seniors-only flights	Purdy et al. (2010); Ravichandran & Suresh (2010); Tsiotsou & Ratten (2010).	Not supported
Service demands	Brundrett (2001); Clemes et al. (2008); Ehrenham (2005); Fiorino (1999); Galili & Bass (2002); Kutcha (2007); Lee & Luengo-Prado (2004); Mason (2002); Vink & van Mastrigt (2011).	Partially supported

Source: Developed for this research

5.2.1.2 Research question 1 conclusions

The RQ1 findings demonstrate that the views of the tourism stakeholders in regard to the future effects on the civil aviation industry of a growing number of baby boomers travelling by air are quite multifarious. However, there is some alignment in the views of the participants and the literature regarding the themes identified in which the findings support the literature partially or fully. The consideration of changing consumer options was prevalent with the strongest considerations being in regard to changing destination choices.

The views regarding seniors-only flights and seniors' subsidiaries of airlines demonstrated a variety of views amongst the participants and this was expected given the loose and intermingling conglomeration of industries which interact to form the *tourism industries*. This mixture of views warrants increased and protracted research so that the airlines can gain a more conclusive understanding of the views of industry professionals. This is especially so where the participants differ in their views. Future research could be applied to the individual themes extracted from this thesis.

Some of the major topics discussed in the literature review, namely increasing technological advances, airline deregulation, entry of competition to the Australian civil aviation market and age demographic shifts are the major reasons for the complexity of the responses in RQ1, in which these factors act as forces on the civil aviation industry which the airlines are unable to combat with much success. Rather the airlines must seek to implement internal strategies to negotiate these forces. Additionally, the multifarious data extractions were expected given the nature of the tourism sector as a conglomeration of interacting industries. As per Table 5.2 below, research question 1 produced five *new* findings and three *supplemented* findings. The remaining four findings had already been *established* in the literature.

Table 5.2: RQ1 findings

Status	Theme	Findings
New (n=5)	Demands at airports	• A lack of understanding amongst the participants in regard to deregulation which potentially affects airlines' airport operations and choice of airports.
	Natural population growth	• Participants consider that VFR travel to offset the effects of the age baby boomer air traveller cohort.
	Personal resources	• Division amongst Australian tourism sector stakeholders with regard to views on the financial affluence of baby boomers to travel by air.
	Recognition of opportunities	• Some participants considered that the airlines were in recognition of the opportunities of a growing baby boomer (air traveller) cohort.
	Seniors-only flights	• Varying views amongst the participants in regards to the viability of seniors-only flights.
Supplemented (n=3)	Changing consumer options	• Tourism stakeholders may not be fully aware of the future benefits of airline alliances which are options to baby boomer air travellers.
	Increased demographics recognition	• Participants postulated the application of seniors' airfares as a means of recognising the increasing numbers of baby boomers travelling by air.
	Service demands	• Participants considered that premium economy class amongst various airlines is potentially attractive to the baby boomer market.
Established (n=4)	Industry cohesion	• Airlines are partnering with cruise lines.
	Lack of recognition of opportunities	• Airlines don't fully recognise opportunities.
	Physical health	• Mobility of baby boomer travellers through airports and the lack of qualified staff to assist in wheelchair movements.
	Seniors airline subsidiaries	• Airline subsidiaries catering to baby boomer travellers only would not be desired by baby boomer travellers because they consider themselves younger than their actual ages

Source: developed for this research

5.2.1.3 Research question 1 omissions

With the 12 themes extracted in this research question, a number of omissions in both the literature and participant responses have been identified.

Whilst there was some mention of frequent flyer programs, the participants displayed no recognition of the prevalence of airline alliances which could serve to increase destination choices for the baby boomer air travellers. Additionally, there was little discussion by participants of the increasing practice of code-share arrangements. Such alliances have been growing partly due to the advent of deregulation, which was also not discussed by any of the research

participants. Potentially, this could mean a lack of awareness amongst Australian tourism sector stakeholders in this regard, as well as a disposition amongst tourism stakeholders to support protectionist measures by the Australian Government and for measures to reduce international competition in the Australian market from competitors such as Tiger Airways.

There is a paucity of literature on the opportunities available to the airlines operating to, from and within Australia as a result of the growing numbers of baby boomer air travellers. There is also a paucity of literature about the possibility of airline subsidiaries and seniors-only flights in Australia and the tourism sector's views about these possibilities. Additionally, there was an absence of literature discussing the possibility of charter flights to and from Australia with a focus on baby boomer air travellers. Finally, there was a dearth of discussion amongst participants in regard to airport choices available to the airlines as a consequence of deregulation.

5.2.2 Research question 2 main findings

Do the Australian tourism sector stakeholders think that the airlines are ready for the operational and organisational changes identified in the literature which this may require?

Research question 2 was presented to the participants via interview questions IQ6 through to IQ14, through which 11 themes manifested. Accordingly, RQ2 will be discussed under the themes of:

i. Aviation security;
ii. Changing consumer options;
iii. Demands at airports;
iv. Increased recognition of demographics;

v. Cohesion between tourism industries;
vi. Inflight services;
vii. Marketing practices;
viii. Physical health;
ix. Seniors-only flights;
x. Service demands;
xi. Technology.

(i) Aviation security

A total of 26 participants discussed themes pertaining to requirements and considerations for future aviation security.

There were 7 responses which considered that current security measures were over-reactions and a further 5 responses which postulated that there could be increased security regulations. Another 6 responses considered that there would be increasing numbers of cases of artificial body parts amongst future baby boomer travellers. There were 3 participants who stressed the importance of improved security procedures.

Discussion in regard to aviation security is found in the literature. Poria et al. (2010) expressed concern about the growing numbers of baby boomer air travellers and their future effects on civil aviation, security issues included. The literature found that inefficient ground services including security could affect the health of baby boomer travellers (Briones & Nguyen 2007; Davies 2009; Gardner 2003; Hunter & Layton 1986; Naudi 2002; Price 2006; Roman 2007; Sharkey 2003).
There are no *new* findings in this immediate theme.

(ii) Changing consumer options

Nineteen participants discussed themes in regard to changing consumer options as the numbers of baby boomer air travellers grow.

A total of 11 responses yielded considerations that future destinations desired by baby boomers would be demand-dependent. A further 8 responses indicated that the choices of destinations for baby boomer travellers would change and 3 responses specifically identified a drive by future baby boomers for adventure travel.

Batra (2009) and Patterson and Pan (2007) identified adventure tourism as sought by baby boomer travellers and this is consistent with the research findings. Furthermore (and again as with the theme of changing consumer choices in RQ1) concurrence between the literature and the data was established in regard to the importance of considering age demographics of travellers when planning destination marketing (Gitelson & Kerstetter 1990; Glover & Prideaux 2000; Plog 2006). This was further supported by Button and Drexler (2006), Nordin (2005) and Roubik (2002) who stressed the continued growth in tourism destination choices for travellers.

However (again as per the same theme of *changing consumer options* in RQ1), there was a paucity of discussion in regard to the growing options which baby boomer air travellers would have available to them through the advantages of airlines alliances, as identified by Bieger and Wittmer (2011), Lawton (2003) and Lazzarini (2011).

In accordance with RQ1, this theme yielded a *supplemented* finding that tourism sector stakeholders may not be fully aware of the future benefits of airline alliances for baby boomer air travellers.

(iii) Demands at airports

Twenty-five responses included themes pertaining to the future demands of baby boomer air travellers at airports. As with the same theme in RQ1, these responses covered aircraft access, airports infrastructure, baggage handling, airline staffing, ground handling and lounge access.

The increased traveller movement through Australian airports was highlighted by BITRE (2012c) in the literature, however Briones and Nguyen (2007) discussed concerns regarding lowering customer service standards and quality along with Hunter and Layton (1986) who further associated the lowering of standards with deregulation. Additionally, congestion at airports (associated with airport infrastructure) was addressed by Barrett (2004), Cidell (2003), Harrison (2004), Min (1994), Rose et al. (2008) Snowdon et al. (1998), Tien and Sconfeld (2007) and Wolfe (2003). Furthermore, the literature identified the growing tendency of airlines, especially LCCs to use alternative airports which meant that baby boomer travellers would have to travel greater distances to access air travel (Blackstone et al. 2006; Fournier et al. 2005; Pels et al. 2000; Price 2006). Moreover, de Neufville (2007), Hamzawi (1992), Mazzeo (2003) and O'Toole (2005) associate increasing delays at airports with deregulation.

However, one theme which the literature did not identify was the use of airline lounges by baby boomer travellers before flights for their comfort. Furthermore, the participants established no nexus between deregulation, airport congestion and subsequent pressures on airport infrastructure.

The *supplemented* finding in this theme is the suggestion that airlines consider providing waiting lounges to baby boomers.

(iv) Increased recognition of demographics

Twelve participants stressed the importance of the airlines increasing their recognition of baby boomer travellers. In 14 responses throughout RQ2, it was argued that airlines need to pay more attention to baby boomer travellers. Further responses suggested that frequent flyer programs could be improved, that airfares in general could be lowered, and that seniors' airfares could be introduced more.

BITRE (2008) stressed the importance of customer service staff skills in handling Australia's changing demographics and Roy Morgan Research (2005) identified a growing proportion of baby boomers amongst travellers. Purdy et al. (2010), Ravichandran and Suresh (2010), and Tsiotsou and Ratten (2010) found that baby boomer consumers demanded unique products; and Sperazza (2011) and Szmigin and Carrigan (2001) found that baby boomer consumers considered themselves younger than their actual ages, which was supported by Muller and O'Cass (2001) who found a difference between subjective and actual age which affected the determinants of attitudes, interests and preferred activities. Furthermore, Reisenwitz and Iyer (2007) further highlighted the importance of organisations refraining from the segmentation of the baby boomer cohort into older and younger baby boomers.

Whilst the literature discussed may not have targeted baby boomer air travellers in their entirety, the theme of concern in the literature aligns with the research, in which the importance of recognising the growing prevalence of baby boomer consumers (in this case air travellers) is established. Associated with this comes of the importance of providing products which meet that age cohort's unique requirements.
There are no *new* findings in this theme.

(v) Cohesion between tourism industries

Five participants discussed airlines being more involved with other tourism sector stakeholders. This included more application of codeshare services, the involvement of destinations in providing for travellers and the importance of travel agents as service providers for baby boomer air travellers.

There was some conjecture in the literature with regard to the use of travel agents by baby boomers, with Patterson (2008) finding that baby boomers are increasingly using IT to self-book. Batra (2009) however posited that baby boomer travellers were of increasing importance for agents.

The importance of destinations' involvement in considering age demographics in regard to marketing and operations was established in the literature by Gitelson and Kerstetter (1990), Glover and Prideaux (2009), and Plog (2006), in concurrence with the importance of destination involvement (i.e. tourism stakeholders at destinations) in this research. Codeshare services were expounded in the literature by Gayle (2006) and their importance is discussed by Bieger and Wittmer (2011) and Lazzarini (2007).

There are no *new* findings in this theme.

(vi) Inflight services

One participant discussed the importance of improving meals and crew attitudes. Another one participant suggested that airlines could provide increased inflight destination education. Discussion of inflight meals is in concurrence with the literature. Worsley et al. (2011) stress the importance of providing healthy meals to baby boomers. The practice of airlines reducing meal

services on flights during economic downturns is discussed by Porter (1996). BITRE (2008) discusses the importance of airline staff skills and competence, especially for meeting Australia's changing age demographics and civil aviation's growth as an industry.

The provision of increased inflight destination information by the airlines as a means to service baby boomer air travellers better was not prevalent in the literature and serves as a *supplemented* finding.

(vii) Marketing practices

A total of 27 participants discussed suggestions that airlines alter their marketing practices (including digital marketing) in order to promote innovative products to the market, including baby boomer travellers.

Glover and Prideaux (2009; 2010) discuss the nexus between marketing and understanding generational requirements in tourism services as well as increasing changes in consumption patterns and preferences which could serve to influence overall tourism demand. Muller and O'Cass (2001) suggested that because seniors consider themselves younger than their actual ages, this could be applied in marketing.

There are no *new* findings in this theme.

(viii) Physical health

The physical health of baby boomer air travellers was addressed by 22 participants. This theme included aviation medicine, reduced health and mobility, aircraft medical facilities, crew medical training, inflight education, inflight physicians and wheelchair facilities.

The increased prevalence of inflight emergencies involving baby boomer travellers, has been covered in the literature (Cocks & Liew 2007; Coker et al. 2007; Gardelof 2002; Goodwin 2000, Rayman et al. 2004). Inflight medical episodes in general (related to baby boomer travellers) were also identified by Silverman and Gendreau (2009) and Macleod (2008). Here the research concurs with the literature. The literature discusses the physical health of baby boomers in some depth. The spread of disease via aircraft was raised by Gezairy (2002), Harrington et al. (2005) and Warren et al. (2010), who associated the spread of diseases internationally via air with deregulation of civil aviation. This issue was not discussed in the research.

The increasing numbers of cases of medical professionals such as physicians and nurses being called upon to assist air crews in inflight medical episodes was highlighted in the literature (Dowdall 2000; Goodwin 2000; Nordenberg 1998; Rayman et al. 2004; Ruskin et al. 2008; Shesser 1989; Tonks 2008; Wong 2009) and there was some consideration in the research from participants that there could be gratis seats offered to physicians on flights in return for attending to such episodes. The latter suggestion was not found in the literature.

Discussion of increased inflight health education, as well as specific medical episodes which could affect baby boomer travellers, was concentrated mainly on deep vein thrombosis (DVT) which was discussed in the literature (Arya et al. 2002; Bradford 2007; Dehart 2003; Elkof et al. 1996; Kniffin et al. 1994; Montagnana et al. 2010; Motykie et al. 2000; Nicholson et al. 2003; Scurr et al. 2001, Silverstein et al. 1998; Smith 2000; Tan et al. 2007). However, other medical episodes such as hypobaric hypoxia and syncope, which were also found in the literature (Katschinski 2006; Low & Chan 2002; Kenny 2003; Lipsitz 1983), were not established in this research. In contrast, responses from participants in respect to the increased medical training of air crews, is in concurrence with the literature (Donaldson & Pearn 1996).

A *supplemented* finding was consideration by participants for the provision of gratis travel by the airlines for physicians willing to attend to inflight medical episodes (should such arise). The prevalence of medical conditions other than DVT and the issue of transnational diseases (i.e. movement of diseases from nation to nation by air travellers) were not raised by the tourism sector stakeholders.

(ix) Seniors-only flights

One participant addressed the theme of seniors-only flights in RQ2. As with RQ1, there was no literature supporting the provision of seniors-only flights to and from Australia in response to the growing number of baby boomer air travellers, or any discussion of the views of Australian tourism sector stakeholders in this regard.

Purdy et al. (2010), Ravichandran and Suresh (2010) and Tsiotsou and Ratten (2010) found that baby boomer consumers demanded unique products. However, they did not support the provision of seniors-only flights to and from Australia in response to the growing number of baby boomer air travellers, and nor did they discuss the views of Australian tourism sector stakeholders in this regard.

A *new* finding in this theme is view that charter flights may be viable for the baby boomer market.

(x) Service demands

Thirty participants being all but two of the 32 participants, discussed service themes. This included comfort demands, communication, equipment types, premium economy class, seating and spacing.

Comfort themes (including seating and spacing) are found extensively in the literature (Brundrett 2001; Clemes et al. 2008; Fiorino 1999; Galili & Bass 2002; Vink & van Mastrigt 2011). In contrast, premium economy class travel was not prevalent in-depth in the literature, but this could be due to the relative nascence of this new class of airline service. It was discussed in the literature by Kutcha (2007), Mason (2002) and Lee and Luengo-Prado (2004) as being attractive to business travellers.

Ehrenham (2005), referring specifically to the baby boomer generation stressed the importance of aircraft design, which is consistent with the comfort and quality demands of baby boomers. However, Vink and van Mastright (2011) state that aircraft seating has improved in recent years. Communication with baby boomers on the part of service organisations surfaced as a major concern for the research participants in concurrence with the literature (Jones et al. 2002; Walker & Craig-Lees 1998; Moufakkir 2010; Sambath 2008).

A *supplemented* finding in this theme is the growing popularity of premium economy and its potential attractiveness to baby boomer air travellers.

(xi) Technology

Ten participants discussed the increasing prevalence of IT as a medium to communicate with baby boomer travellers, including the provision of self-check-in services, a form of SST (self-service technology) and improved security systems at airports to improve clearance of baby boomer travellers with artificial body parts. Simplification of SSTs was a desire of the participants.

The literature discusses the importance of organisations' understandings of consumer requirements before installing SSTs (Chang & Yang 2008; Lu et al. 2009). Additionally, Dean

(2008) established that baby boomer consumers preferred human interaction. There are no *new* findings in this theme.

5.2.2.1 Research question 2 results tabulation

The analysis of the in-depth interviews for RQ2 data, as presented in Section 5.2.2, unveiled the major findings which are summarised and depicted in Table 5.3 (over the page). The first column identifies the themes from research question 2. The second column identifies the researchers/writers in the literature who discussed those same themes (i.e. the themes listed in the first column). Finally, in the third column, I state whether the findings of this research are in support of the researchers/writers in the literature, regarding the column 1 themes (i.e. do the responses given by the participants support the literature findings? Is there partial support between the literature and research findings of this thesis? Or is there no support between the literature and research findings?).

Supported means that the findings of this thesis align with the findings in the literature and therefore, no *new* findings have been established in this thesis. *Partially supported* means that the findings of this thesis supplement current knowledge in the literature, therefore current knowledge is *supplemented*. Finally, *not supported*, means that the literature findings do not align with this thesis' findings, therefore a *new* finding has been established.

Table 5.3: RQ2 theme-literature support

RQ2 findings	Literature concurrence	Supported/ Partially supported/ Not supported
Aviation security	Briones & Nguyen (2007); Davies (2009); Gardner (2003); Hunter & Layton (1986); Naudi (2002); Poria et al. (2010); Price (2006); Roman (2007); Sharkey (2003).	Not supported
Changing consumer options	Batra (2009); Bieger & Wittmer (2011); Button & Drexler (2006), Gitelson & Kerstetter (1990); Glover & Prideaux (2000); Lawton (2003); Lazzarini (2011); Patterson & Pan (2007) Plog (2006). Nordin (2005) Roubik (2002).	Partially supported
Demands at airports	Barrett (2004); BITRE (2012); Blackstone et al. (2006); Briones & Nguyen (2007); Cidell (2003); de Neufville (2007); Fournier et al. (2005); Hunter & Layton (1986); Harrison (2004); Hamzawi (1992); Mazzeo (2003); Min (1994); O'Toole (2005); Pels et al. (2000); Price (2006); Rose et al. (2008); Snowdon et al. (1998); Tien & Sconfeld (2007); Wolfe (2003).	Partially supported
Increased recognition of demographics	BITRE (2008); Muller & O'Cass (2001); Purdy et al. (2010); Ravichandran & Suresh (2010); Reisenwitz & Iyer (2007); Roy Morgan Research (2005); Sperazza (2011); Szmigin & Carrigan (2001); Tsiotsou & Ratten (2010)	Supported
Cohesion between tourist industries	Batra (2009); Bieger & Wittmer (2011); Gayle (2006); Gitelson & Kerstetter (1990), Glover & Prideaux (2009); Lazzarini (2007); Patterson (2008); Plog (2006).	Supported
Inflight services	BITRE (2008); Porter (1996); Worsley et al. (2011) Porter (1996).	Partially supported
Marketing practices	Glover & Prideaux (2009; 2010) Muller & O'Cass (2001)	Supported
Physical health	Arya et al. (2002); Bradford (2007); Cocks & Liew (2007); Coker et al. (2007); Dehart (2003); Donaldson & Pearn (1996); Dowdall (2000); Elkof et al. (1996); Gardelof (2002); Gezairy (2002); Goodwin (2000); Harrington et al. (2005); Katschinski (2006); Kniffin et al. (1994); Low & Chan (2002); Kenny (2003); Lipsitz (1983); Macleod (2008); Montagnana et al. (2010); Motykie et al. (2000); Nicholson et al. (2003); Nordenberg (1998); Rayman et al. (2004); Ruskin et al. (2008); Silverman & Gendreau (2009); Warren et al. (2010); Shesser (1989); Scurr et al. (2001); Silverstein et al. (1998); Smith (2000); Tan et al. (2007); Tonks (2008); Wong (2009).	Partially supported
Seniors-only flights	Purdy et al. (2010); Ravichandran & Suresh (2010); Tsiotsou & Ratten (2010).	Not supported
Service demands	Brundrett (2001); Clemes et al. (2008); Ehrenham (2005); Fiorino (1999); Galili & Bass (2002); Jones et al. (2002); Kutcha (2007); Vink & van Mastrigt (2011); Mason (2002); Moufakkir (2010); Lee & Luengo-Prado (2004); Sambath (2008); Walker & Craig-Lees (1998).	Partially supported
Technology	Chang & Yang (2008); Dean (2008); Lu et al. (2009).	Supported

Source: developed for this research

5.2.2.2 Research question 2 conclusions

As with the RQ1 findings, the RQ2 findings demonstrate that the views of the tourism sector stakeholders in regard to the future effects on the civil aviation industry (of a growing number of baby boomers travelling by air) are multifarious. Some extent of alignment between the views of the participants and the literature regarding the themes identified as tabulated in Table 5.3, is prevalent.

As with the conclusion to RQ1, some of the major topics discussed in the literature review, namely increasing technological advances, airline deregulation, entry of competition to the Australian civil aviation market and age demographic shifts, are the major reasons for the complexity of the responses in RQ2, in which they act as forces in the civil aviation industry which the airlines are unable to combat with much success. The multifarious data extractions were expected given the nature of the tourism sector as a conglomeration of interacting industries. The complexities uncovered in RQ2 may require further protracted research for the airlines to gain more conclusive understanding of the views of industry in the respective themes.

As per Table 5.4, research question 2 produced 1 *new* finding and 7 *supplemented* findings. The remaining 5 findings had already been *established* in the literature. The RQ2 findings are depicted in Table 5.4.

Table 5.4: RQ2 findings

Status	Theme	Findings
New (n=1)	Seniors-only flights	• Some participants considered that charter flights may be viable for the boomer market.
Supplemented (n=7)	Changing consumer options	• Tourism stakeholders may not be fully aware of the future benefits of airline alliances which are options to baby boomer air travellers.
	Service demands	• Growing popularity of premium economy and its potential attractiveness to the baby boomer air travellers.
	Demands at airports	• Consideration by participants for the airlines to extend lounges to baby boomers.
	Inflight services	• Provision of increased inflight destination education is required.
	Physical health	• Provision of gratis travel by the airlines for physicians willing to attend to inflight medical episodes; • The prevalence of air travel-related medical conditions other than DVT; • Transnational diseases (i.e. movement of diseases from nation to nation by air travellers) are not to the awareness of the tourism industries' stakeholders.
Established (n=5)	Aviation security	• Baby boomers could be affected by security measures.
	Increased demographics recognition	• Importance that baby boomer requirements be met for purposes of achieving sustainability.
	Cohesion between tourism industries	• Importance of cohesion between tourism industries.
	Technology	• Importance of understanding consumer requirements before installing SSTs.
	Marketing practices	• Effective marketing alignment with generational requirements of consumers.

Source: Developed for this research

5.2.2.3 Research question 2 omissions

The participants who suggested improvement to airlines' frequent flyer programs for the benefit of baby boomer travellers made no specific suggestions of measures which could be taken in this regard.

At the time of this research, there was a paucity of literature discussing the benefits or attractiveness of premium economy class to baby boomer travellers. This however, could be due to the nascence of premium economy class at the time of research.

Whilst the literature contained an abundance of articles in regard to aviation medicine and associated medical episodes relevant to baby boomer travellers there were no articles found at

the time of research supporting the provision of gratis travel for medical professionals (such as Physicians) attending to in-flight emergencies.

5.3 Overall conclusions to the research problem

Alignment between the literature and the research findings uncovered in the interviews has been quite varied and such variations in stakeholder perceptions was expected given the fragmented nature of the tourism industries as identified in the background literature by writers and researchers such as Leiper (2008), who discusses tourism as being a conglomeration of loosely interacting industries. Considering the combined size of the tourism industries, the number of stakeholders involved and the fact that tourism in itself is growing in regards to its economic importance to the nation, complexities abound. These complexities perpetuate and further expand as factors such as deregulation (leading to subsequent liberalisation) and increased competition enter the dynamic capabilities equation, in which airlines must negotiate increasingly complex scenarios involving increasing competition, a growing baby boomer air traveller cohort and the complex multi-faceted tourism industries.

Further to the entry into the Australian civil aviation market of LCCs is the formulation of airline alliances, which also serve to compete in the market, in which frequent flyer programs and code-share arrangements are offered to consumers. Such arrangements increase the range of destinations available to air travellers. Furthermore, some of the views of the participants have also been varied. The variations in the responses further complement the parent literature in regards to the plurality of the tourism industries and thus the requirement for the industries' stakeholders in consolidating their efforts to service the baby boomers.

The literature has demonstrated that the baby boomer market is a growing one and many of the participants of this thesis have discussed the economic importance of that market to the

airlines and tourism as a whole. Not only was the baby boomer air traveller cohort found to be financially affluent (in much of the literature and amongst many of the research participants), it was found to be growing. However, some participant responses challenged this view. Moreover, there is limited concurrence between the research findings and the parent literature in regard to the readiness of airlines (as a tourism stakeholder) to cater to the requirements of the growing numbers of baby boomers travelling by air. According to most of the airline participants, the implementation of measures by the airlines to service the baby boomer market so far do not confirm that recognition. That is, airlines have not implemented changes to meet the demands of the growing numbers of baby boomers travelling by air.

It was suggested that airlines should give attention to: customer service (air and ground), comfort (including legroom and premium economy class configuration), health and aviation medicine and overall recognition of the growing baby boomer market which the literature and interviews demonstrate are a commercially opportune segment. This will require much in the way of qualitative and quantitative research on the part of the airlines, which should include baby boomer travellers themselves as research participants.

5.4 Interpretation in light of the academic literature

This subsection will examine the correlations between various aspects of the literature review (i.e. aspects of each of the parent literature, background literature and the immediate literature – including the data expectations) of this thesis, the results uncovered and the conclusions established. The results of this thesis in comparison to the findings in the literature review (Chapter 2) will be discussed, followed by an interpretation of the results applying the paradigm of dynamic capabilities which was chosen as a change management sub-field with which to view and interpret the results of this research. As will be discussed further, much of the data

expectations discussed in the literature review (Chapter 2) were extracted in the results (Chapter 4).

5.4.1 Interpretation in light of the background literature data propositions

In concurrence with the background literature in regard to the broad nature and complex composition of tourism as a conglomeration of industries which cooperate together to form *tourism*, the responses elicited from participants across the tourism sector segments have been quite broad and varied. Writers such as Driml et al. (2010), Goodenough and Page (1993), Leiper (2008) and Williams and Jantarat (1998) are explicit in their descriptions of tourism as a fragmented set of interacting industries. This thesis applied this argument. The amalgam of interacting industries which form tourism was manifest in this research and this amalgam invited not only a complexity of stakeholders (represented by the participants) but even more, a complexity in the labyrinth of responses elicited in the in-depth interviews.

Whilst the participants in this research did not specify deregulation per se, they did raise themes associated with deregulation. These included LCCs' entry into the Australian civil aviation market. Participants expressed concern in regard to smaller seats and lack of comfort, as part of cost-cutting measures by airlines. The importance of skills for aviation staff to meet changing age demographic shifts as per the background literature was also confirmed in the research findings. The participants considered that airline staff should display more concern for baby boomer travellers, through measures such as reduced airfares.

The literature highlighted concerns for airport services which was also established in the research where participants discussed concerns about lack of wheelchair services, and lack of aircraft access facilities (namely aerobridges). This was also related to participant responses

regarding aviation security measures where participants raised concerns regarding metal body parts as well as overall delays and inconveniences at security checkpoints at airports, in general.

Aviation medicine and the physical health of baby boomers were well established in the background literature and were discussed amongst participants. Themes included proness to developing DVT, the ability of travellers to way-find around airports, the reliance on medical professionals (such as physicians) to assist with inflight medical episodes, the provision of medical equipment such as defibrillators and medical clearances to travel.

The reliance on airlines by tourism stakeholders, namely cruise lines, was evident in the literature and the research. Such partnerships are required to fly travellers to and from airports, and the nearest cruise ports of call. The industry association and council participants in their narratives discussed concerns for civil aviation services in their respective geographical locations presenting practical examples. Finally, Travel agents and tours operators are stakeholders who deal closely with baby boomer travellers and they discussed this in the research in regard to the financial capacities of baby boomers to pay for higher end products, such as premium economy. This was in alignment with data expectations.

5.4.2 Interpretation in light of the parent literature data propositions

Whilst the ability of the airlines to negotiate the challenges they face requires sound change management strategies, the broadness of that academic field in parity with the findings of this research confirm the postulations I discussed in Section 2.3.1 in that a more protracted field of theory is required to apply these findings. Thus, the major subfield found in the parent literature which is utilised as a lens to interpret the findings of this research is that of dynamic capabilities in which the seminal work of David J. Teece (Teece et al. 1994; 1997; 2007) and other researchers and writers in the field of dynamic capabilities are a major focus of the

parent literature. This thesis has produced some valuable insights into the paradigm of dynamic capabilities and its relevance to the modern civil aviation industry. In this subsection I relate the research findings to the parent literature, after which the works of Teece will be referred to along with other writers and researchers who have studied the field of dynamic capabilities.

Because civil aviation is an industry prone to market changes and fluxes, the ability of an airline to respond to increasing competition is crucial to its success. Such changes and fluxes may include, but not be limited to:

- Deregulation
- Competition
- Changing age demographics
- Increasing destination choices
- Growing prevalence of LCCs.

Data expectations in Chapter 2 highlighted the challenges of increasing deregulation (which leads to increased competition) in the Australian civil aviation market, with some regard to the entry of LCCs. LCC entry presents major challenges for the established fully-fledged airlines such as Qantas Airways. Data expectations which were realised in the thesis included the importance of airlines educating the travelling public more in regard to aviation-related diseases (particularly DVT) as well increased provisions of inflight medical equipment (such as defibrillators and compression stockings). Additionally, the importance of customer service and communication, streamlined user-friendly IT services and inflight comfort was prevalent in the literature and in the research findings. Moreover, the validity of the emergent findings, in line with the parent literature, requires the airlines to consider amendments and provisions to their current practices through which they can achieve dynamic capability and thus competitive advantage.

Having discussed the parent literature data expectations in relation to the research findings, I will now proceed to discuss the relevance of Teece's findings to this thesis. These are presented in Table 5.5. In the left column of the table below I present Teece's disaggregation of dynamic capabilities' tasks and in the right column, I discuss suggested actions for the airlines to achieve competence in those tasks, with a view to achieving success in attaining overall dynamic capability. However, an overall requirement pertinent to the requirements which I suggest is ongoing research, for example in the form of questionnaires to baby boomer tourists and air travellers. Possibilities for airlines' implementation are not limited to those suggested in Table 5.5 (over the page).

Table 5.5: Airlines' requirements to achieve dynamic capability

Dynamic capabilities disaggregation by Teece (2007, p. 1319)	**Suggested requirements for airlines, pertinent to the corresponding disaggregations**
'*Sense and shape opportunities and threats*'	(a) Sense the prevalence, emergence and growth of baby boomers travellers; (b) Determine the unique requirements of baby boomer travellers; (c) After understanding the market requirements, shape opportunities by providing the baby boomer market with its requirements; (d) Having identified potential threats (e.g. new market entrants who may or may not be meeting baby boomer requirements) move to act by providing the baby boomer travellers with services/products to combat those threats; (e) Cordial ties (including the increased sharing of market information) with major stakeholders of the tourism industries, including (but not limited to): airports managements, ground operators, travel agents and tour operators, tourism industry associations and councils and other airlines (through partnership programs which may include frequent flyer arrangements and code-share services);
'*Seize opportunities*'	(a) Having an understanding of the changing markets (through the instrumentality of primary research), airlines may seize opportunities by carefully considering the concerns and feedback of baby boomer travellers, especially in regards to their personal requirements (such as increased personalised service); (b) Implementing the measures required to address those concerns; (c) Threats are identified by closely monitoring the moves by governments for deregulation and the entry into the market by competitors, particularly LCCs.
'*Maintain competitiveness though enhancing, combining, protecting, and when necessary, reconfiguring the business enterprise's intangible and tangible assets*'	(a) The training of airline staffs to understand the changes in the market and the associated requirements in the airlines in order to remain sustainable and thus achieve competitive advantage; (b) Instilling a sense of friendliness toward baby boomers amongst airline staff (air and ground), without losing sight of the importance of other traveller demographics; (c) The installation of airport way finding signage appropriate the presbyopic challenges pertinent to baby boomer travellers; (d) The installation of information technology (such as online booking systems, self-check-ins, online check-ins) commensurate to consumer requirements and as user-friendly as possible; (e) Upgrading of aircraft and in-cabin comfort, e.g. increased seat spacing. Increased premium economy; (f) Aviation medicine capabilities which consider wide-ranging potential aviation/travel-related illness pertinent to baby boomer air travellers.

Source: Developed for this research

Although the dynamic capabilities theory has been applied to civil aviation in the past, this thesis has demonstrated its application with regard to the abilities of the airlines to negotiate increasingly competitive environments amid changing age demographics of air travellers and the perceptions developed by tourism sector stakeholders in this regard. The airlines operating to, from and within Australia, are increasingly being challenged with the task of providing services amid a shift in the age demographics of air travellers. Moreover, the altering age demographics, coupled with mounting complexities in the tourism industries in which more non-air transport providers participate in the tourism industries as well as increasing deregulation and competition present a complex maze of bureaucratic requirements, competition, consumer demands and intra-industry practices which the airlines must respond to in order to remain commercially sustainable in the Australian civil aviation market.

Wissema et al. (1981) argue that changes in an organisation's environment, warrant changes in its operations. By researching the growing baby boomer air traveller market, which this research has established is growing both in actual air traveller numbers and financial affluence the airlines are better prepared to meet that market's requirements. Furthermore, by meeting baby boomer requirements, the airlines may work towards improved efficiency and sustainability which will lead to increasing the dynamic capabilities of the various airlines. This would serve to assist the airlines to remain profitable amid the changes in traveller demographics as well as the liberalising industries which in turn are creating increased competition, especially in the continued emergence of LCCs.

Finally, the findings of this thesis could be utilised in future research in which baby boomers (as the sole participants and in larger numbers) could be questioned (on this thesis' findings). Such could further test table 5.5's suggestions (and this thesis' findings) and in which baby boomer perceptions are further established.

5.4.3 Interpretation in light of the immediate literature data propositions

The seminal works of David J. Teece (Teece et al. 1997; 2007) and other researchers and writers have been the main focus of the parent literature discussion in regard to the paradigm of dynamic capabilities. Here I discuss comparisons between the parent literature findings in regard to dynamic capabilities and the immediate literature, as well as the findings in relation to the immediate literature data expectations.

As expected (and discussed in Section 2.4.7) medical issues pertinent to baby boomer travellers have been extracted in the findings of this thesis. Related to this were the concerns of participants regarding artificial body parts and aviation security. Further to security procedures, the participants expressed concerns with regards to procedures at airports in general, such as customer service, check-in (increased SSTs and reduced staffing levels), access to aircraft and wheelchair facilities. Additionally, the mobility of baby boomer travellers and their ability to way find around airports were identified as issues by participants. Comfort (including seating and spacing) was also an immediate literature finding about which the participants expressed concerns.

Teece et al. (1997) postulated that a '*dynamic capabilities approach is promising both in terms of future research potential and as an aid to management endeavouring to gain competitive advantage in increasingly demanding environments*' (p. 510). The parent literature identified dynamic capabilities as a major paradigm affecting modern organisations in regard to the importance of organisations being able to achieve competitive advantage. Despite the relative newness of this paradigm, civil aviation studies are not excluded from it, as demonstrated in the parent literature. Concern in regard to the ability of the airlines to handle the growing number of baby boomers travelling by air has been uncovered in the narratives of this thesis, including (quite importantly) those of the 5 baby boomers.

Major themes which were extracted in relation to RQ1 and RQ2, with some extent of commonality in the participant responses between the two research questions were:

- Aviation security
- Changing consumer options
- Demands at airports
- Increased recognition of the importance of demographics
- Cohesion between tourism industries
- Inflight services
- Lack of recognition of opportunities
- Marketing practices
- Natural population growth
- Personal resources
- Physical health
- Recognition of opportunities
- Seniors airline subsidiaries
- Seniors-only flights
- Service demands
- Technology.

The literature highlights the importance of organisations (with some specific discussion in regard to airlines) meeting client requirements in order to remain profitable and achieve competitive advantage. Major contemporary issues in which airlines are challenged to achieve dynamic capabilities include increasing deregulation (trade liberalisation) leading to more competition and the changing age demographics of air travellers.

Addressing the concerns of tourism sector stakeholders by implementing practices which serve to establish dynamic capabilities in the airlines is a major requirement for airlines to attain competitive advantage. Research would play a major role in the drive to attain dynamic capability so that airlines may gain an advanced understanding of the demographics amongst air travellers and relate these findings to the competitive environment.

5.5 Interpretation in light of current practices

The findings of this research show that whilst there is some nexus between airline practices and the unique requirements of the baby boomer cohort, there are still themes which require attention from the airlines' managements. The absence of airline management from this research presents difficulties in ascertaining if the practices which are implemented are in response to the growing number of baby boomer air travellers. However, the new and supplemented findings of this research indicate that even if the airlines were acting in response to baby boomer air traveller emergence, more is required to meet unique requirements of this cohort of air travellers. Further research could be directed at the themes identified in Chapter 4, which airlines could closely research.

Airlines will be required to conduct further primary research (perhaps quantitative) to further identify areas for improvement and thus become more proactive in securing baby boomer air traveller requirements. Such measures would be crucial for the airlines to forge and solidify long-term patronage from the baby boomer air traveller market, which the literature and much of the current research have identified as an affluent and growing one. Dynamic capabilities as a field of academic study, has further served to interpret this study's findings and accordingly I postulate that it would serve as a good paradigm for airlines to base their long-term strategies on. Such implementation however can only come after effective and sound research by the airlines.

5.6 Implications for airlines' policies and practices

As discussed in the literature, civil aviation is a competitive industry and because over 50% of airline passengers are tourists (many of whom which are themselves baby boomers travellers) airlines may be required to plan, develop, implement and maintain practices in which they should aim to be more dynamically capable of meeting the unique requirements of the baby boomer cohort. This however is not to suggest that airlines must become oblivious to the requirements of any other segment or generation. However given the size, affluence and potential influence of the baby boomer cohort as identified in the literature and in this research, some of the main conclusions of this chapter, require attention. A major challenge which the airlines would be presented with is the ability to become dynamically capable of meeting the varying requirements of a multitude of segments (e.g. business travellers) and age cohorts (e.g. baby boomers, generation X etc.), especially in the current competitive environment in which deregulation is resulting in increased competition.

The themes which have surfaced most often in the research have been related to the areas of customer service, aviation medicine, comfort, industries' cohesion and general recognition of the baby boomer cohort of air travellers. Further confirmation of the importance of these themes may become manifest through protracted ongoing research. Primary research will be key for airlines to first recognise the importance of the baby boomer market, after which they may proceed to research the requirements of that changing market, and delve into themes beyond the findings of this thesis.

5.7 Suggestions to the findings

In this immediate subsection, I present my suggestions to the airlines in regard to the findings extracted from the data. Table 5.6 presents the main themes, along with my suggestions in

which the airlines could potentially implement measures to address the concerns expressed by both the participants of this thesis and the writers and researchers identified in the literature review, with the aim of becoming increasingly dynamically capable to compete in the increasingly competitive civil aviation industry and thus achieve competitive advantage.

Measures which airlines may implement may not be limited to those listed in Table 5.6. Additionally, some suggestions may overlap with theme findings, due to the multifarious nature of results and the relationship between various themes. These suggestions are based on the responses from the participants and could serve as a basis for further protracted research (ideally with greater numbers of questionnaires) by the various airlines should such suggestions appear efficacious. Finally, given the difficulty in gaining access to airline participants for research, it must be noted that some airlines could already be implementing some of these measures.

Table 5.6: Suggestions to the findings of this thesis.

Main theme findings	**Suggested measures**
Aviation security	• Conduct ongoing research (e.g. surveys) with baby boomer travellers to assess security measures. • Work more closely with airport management and security suppliers to ensure more dignified security process for travellers with artificial body parts (e.g. separate screening areas).
Changing consumer options	• Conduct more baby boomer consumer research. • Work more closely with other tourism stakeholders, such as cruise lines, train operators, coach operators, travel agents, etc. to ensure streamlined services are delivered to travellers across all stakeholders. • Provide more packages with operators offering adventure tourism. • Operate flights to increased destinations, i.e. not so much code-share but flights operated by fully fledged airlines, e.g. Qantas brand operated services to Paris, Rome, and San Francisco.
Demands at airports	• Access to lounges, with or without nominal charges. • Work closely with airports to ensure streamlined procedures, from baggage drops to check-ins (SSTs and otherwise) to boarding. • Use (where possible) multiple aero bridges for enplaning/deplaning. • Consider increased involvement in the expansion of infrastructures at airports, such as installation of aero bridges at airports currently without such devices. • Increase the provision of electric cars at airports. • Provide bus services from major metropolitan locations to/from airports, either by the airlines themselves or through coach operators, with or without nominal charges. • Reduce checked baggage charges to reduce heavy weight in cabin loads.
Increased demographics recognition	• Seniors' airfares. • Seniors' frequent flyer clubs. • Increase cohesion with other tourism stakeholders e.g. cruise lines. • Seniors' access to lounges, regardless of class of travel service. • Train airline staff to recognise the baby boomer cohort's psychology and unique requirements.
Industries cohesion	• Work more closely with education providers (for research purposes) to better understand the baby boomer market from an academic/research perspective. • Work more closely with airports to ensure more comfortable access to/from and within airports for baby boomer travellers as well as comfortable facilities such as lounge areas, food & beverage retail outlets, and intra-terminal transport (such as wheelchairs & electric buggies). • Increase cooperation with tour operators & airport managements to ensure seamless transitions between aircraft, through airports and on to tours, with minimal (if any) changes in standards required to cater for the baby boomer traveller. • More cooperation with travel agents who are still sources of business and potentially sources of intelligence regarding the requirements of baby boomer travellers.
Inflight services	• Increase comfort (e.g. seating space, greater recline). • More drinking water on flights over 2-3 hours.

Table 5.6: Suggestions to the findings of this thesis (Continued).

Lack of recognition of opportunities	• Provision of seniors airfares. • Targeted marketing, e.g. baby boomers may be subjects of advertising.
Marketing practices	• More baby boomers in advertising, including inflight travel experiences. • Target seniors during non-school holiday periods. • Consider more cultural destinations, e.g. Europe, South America.
Natural population growth	• No specific requirements other than understanding the purposes of VFR travel amongst airline staff (including air crews) and its importance to baby boomer travellers.
Personal resources	• Maintain traditional services, such as flights between major cities using fully-fledged products, e.g. the Qantas brand between the capital cities as well as Gold Coast, Cairns and Townsville to name a few points.
Physical health	• Extend gratis seats to at least one physician or other medical professional (medics, nurses) in exchange for commitments to attend to inflight medical episodes, for flights longer than 3 hours. • Provide compression stockings (with or without nominal charge). • Improve inflight meals with or without nominal charge. • Increase operational time allowances for processes such as enplaning. • Increase training of aircrews, with at least 1 crew member trained to the level of a medic or paramedic. • Increase inflight health education to passengers, e.g. video presentations, printed material. • Mandatory data banks of inflight medical episodes, accessible by physicians nation-wide. • Increase provision of individualised power points for devices such as nebulisers. • Use (where possible) multiple air bridges for enplaning/deplaning.
Recognition of opportunities	• Conduct in-depth research with baby boomer air travellers in an ongoing fashion. This could be done at airports or via direct contact before and after flights, in which baby boomer travellers may be given incentives, such as reduced travel costs, for involvement.
Seniors airline subsidiaries	• Research to determine the efficacy of this in future years as the proportion of baby boomer air travellers grows. There could be a seasonal/destination demand for this.
Seniors-only flights	• Research to determine the efficacy of this in future years as the proportion of baby boomer air travellers grows. There could be a seasonal/destination demand for this.
Service demands	• Increase the provision of premium economy class on flights. • Increase the alignment with cruise lines, e.g. flights to meet cruises and inclusive air/sea packages. • Detailed destination videos played inflight. • More flexibility in airfare conditions, e.g. reductions in change penalties.
Technology	• Increase staffing at airports to render assistance to baby boomers (amongst other travellers in using self-service technology, such as check-ins and baggage tagging). • Provide online staff, contactable by travellers for around-the-clock assistance with regard to IT usage.

Source: Developed for this research

Additionally, future baby boomers who are emerging into the future as cashed up able travellers, may develop needs divergent to those baby boomers researched today.

5.7.1 Managerial implications of the suggestions to the findings

Having discussed and tabulated suggestions which the civil aviation airlines' managements could potentially apply to address the qualitative findings of this thesis, this immediate subsection will identify some of the implications which the airlines' managements could be challenged with in regard to those findings (new and supplemented). This subsection will provide a general overview of potential implications based upon the themes extracted in this research thesis.

Baby boomer air travellers are demanding of more customer service, understanding of their service demands, such as the ability of arrange their travels through travel agents and access to assistance when using the internet to self-arrange their trips. Airlines (or at least some) have not been communicating with their travellers via the medium of travel agents, instead preferring that travellers book direct using the internet. The prevalence of airlines' sales representatives' sales calls to travel agents has been diminished, in which the airlines are potentially not gaining full understanding of travellers' requirements. Additionally, air travellers (of which many of the baby boomer generation were less tech-savvy) were inclined to require more assistance (e.g. in the form of a help desk) to assist in IT issues, such as online reservations enquiries. Additionally, the airlines have been reducing their staff numbers at airports in which more SST facilities are availed for travellers' usage; again this has affected the abilities of some baby boomer air travellers, who are less inclined to operate such IT, which in turn has affected their abilities to negotiate airports including baggage drop-off and check-in facilities. Additionally, airlines have not considered the rest requirements (for health purposes)

of baby boomer air travellers, with regard to their facilities at airports (such as lounge access and increased staff service).

Whilst aviation security is an area in which governments and airports have considerable involvement and whilst travellers of any generation could be potential terrorists, as stated by participants, airlines have not taken into consideration the possible effects of increasing security measures on baby boomer air travellers, especially as some participants of this qualitative research have indicated that security measures are obtrusive for some baby boomer air travellers. This could mean the airlines must consider:

- Assessment of acceptability (on the part of baby boomer air travellers) of the aviation security measures applied at airports;
- Assessment of optimum consumer options (E.g. destinations flown to) for all air traveller demographics, which are appealing to baby boomers;
- Possible seasonal demands for seniors-only flights.

Increased cohesion (in which greater public relations practices, communication and joint products – such as packages – will be required, potentially beyond what is already offered) with tourism industries' stakeholders will be required. This is especially with regard to:

- Airports' managements through which airlines will negotiate greater dealings regarding use of facilities such as aerobridges, electric wheelchairs and cars, vehicular transport access for travellers, more lounges;
- Tourism education providers for airlines to better understand and appreciate the baby boomer air traveller market from an academic/research perspective;
- Travel agents (in which commissions will have to be paid and perhaps even increased to ensure a flow of business in which baby boomer travellers are sourced);

Increased inflight services and provisions will attract increased financial costs for the airlines, which the latter may recoup through nominal charges, where required. Such may include (but not be limited to):

- The provision of compression stockings;
- More drinking water on longer flights;

The airlines have not provided enough facilities in regard to aviation medicine on flights, given the increasing propensity of air crews to request the assistance of medical professionals to attend to inflight medical episodes. Many aircraft (usually in economy class) lack ample power points for personalised equipment (such as nebulisers). Furthermore, at the time of writing, airlines were not candidly offering gratis seats to medical professionals promising to attend to inflight medical episodes.

Premium economy class is relatively nascent as a class of airline service, and should the airlines consider further installing this service (if considered viable) it would require greater investment on the part of airlines in regard to aircraft in cabin fittings. Such a venture would also require greater research in order that the airlines achieve a greater understanding of the air routes which baby boomer air travellers would be more disposed to travel on.

Baby boomer air travellers may require increased assistance with use of SST's and online booking sites, in order that their proficiency in using such may be increased and enhanced. This would require increased financial investment for airlines' managements, as they promote self-use services.

Finally, a further implication for airlines' managements is the potential requirement for greater recognition of the baby boomer air traveller market, through the instrumentality of marketing

(including advertising, using baby boomers as the subjects) and the establishing of seniors' flying clubs.

5.8 Contributions of this research to theory

The literature review established paucity of studies regarding the research theme of this thesis and thus a gap in knowledge. This thesis has highlighted a broad set of perceptions of Australian tourism sector stakeholders regarding the readiness of airlines to handle the growing number of baby boomers flying, in an Australian national context. The variations in stakeholders' views serves to support the finding of writers and researchers such as Leiper (2008) that tourism is a conglomeration of industries and not one solid entity, even though investigating this topic was not the intent of this thesis. The similarities, as discussed under various themes, serve to support, supplement and add to current knowledge.

Overall, it has been established that the perceptions of Australian tourism sector stakeholders with regard to the readiness of airlines to handle the growing number of baby boomers flying, are multifarious and worth further research and investigation by airlines.

Summarised from Tables 5.2 and 5.4, Table 5.7 (over page) presents the overall findings of this thesis.

Table 5.7: Research theme findings

Status	Theme	Findings
New ***(n=6)***	Demand at airports	• A lack of understanding amongst the participants in regard to deregulation which potentially affects airlines' airport operations.
	Natural population growth	• Consideration by participants that VFR travel will counterbalance the effects of the age baby boomer air traveller cohort.
	Personal resources	• Division amongst Australian tourism sector stakeholders with regard to the views of the financial affluence of baby boomers to travel by air.
	Recognition of opportunities	• Consideration by some participants that the airlines were in recognition of the opportunities of a growing baby boomer (air traveller) cohort.
	Seniors-only flights	• Varying views amongst the participants in regards to the viability of seniors-only flights; • Participants' views that charter flights may be viable for the boomer market.
Supplemented ***(n=8)***	Changing consumer options	• Tourism sector stakeholders may not be fully aware of the future benefits of airline alliances which are options to cater for baby boomer air travellers.
	Demands at airports	• Suggestions by participants that the airlines provide access to lounges for baby boomers.
	Increased demographics recognition	• The participants consider the application of seniors' airfares as a means of recognising the increasing numbers of baby boomers travelling by air.
	Inflight services	• Participants' desire increased inflight destination education.
	Physical health	• Provision of gratis travel by the airlines for physicians willing to attend to inflight medical episodes considered important by participants; • Participants not familiar with the prevalence of air travel-related medical conditions other than DVT; • Transnational diseases (i.e. movement of diseases from nation to nation by air travellers) are not in the awareness of the tourism sector stakeholders.
	Service demands	• Participants considered premium economy class amongst various airlines is potentially attractive to the baby boomer market.
Established ***(n=8)***	Aviation security	• Baby boomers could be affected by security measures.
	Increased demographics recognition	• Importance of baby boomer requirements being met for purposes of achieving sustainability.
	Industry cohesion	• Airlines are partnering with cruise lines; the importance of industry cohesion
	Lack of recognition of opportunities	• Airlines lack recognition of opportunities.
	Marketing practices	• Effective marketing alignment with generational requirements of consumers.
	Physical health	• Mobility of baby boomer travellers through airports and the lack of qualified staff to assist in wheelchair movements.
	Seniors airline subsidiaries	• Airline subsidiaries catering to baby boomer travellers only would not be desired by baby boomer travellers because they consider themselves younger than their actual ages
	Technology	• Importance of understanding consumer requirements before installing SSTs.

Source: Developed for this research

5.9 Research limitations

Limitations of qualitative research methods in general were discussed in Chapter 3. However, research limitations pertinent to this thesis are deserving of further discussion. This section will discuss overall limitations in the 2 research questions.

A major limitation was time constraints. Whilst most interviews lasted 40 to 60 minutes (beyond the originally intended 25-30 minutes) this was not always ample to ensure that participant responses were fully elaborated upon. Time constraints rendered probing difficult. Because the participants of this research were primarily busy people with time constraints, the interviews may not have covered everything elicitable within the research questions presented. Reticence may have also been a factor when eliciting responses from some participants, particularly where time was a constraint and where the participants decided to complete the surveys themselves (omitting some questions and/or not answering questions as fully as others).

A further potential limitation are the contradictions in the literature regarding comfort in aircraft seating, in which some writers argued that spacing should be increased and another that found spacing was ample. The reason for this however could be that the article arguing that spacing was ample on newer aircraft was very up-to-date (Vink and van Mastrigt 2011). This topic may deserve further research on the part of airlines and researchers.

The original intention was to have 10-12 airlines involved in the research with one to two participants from each airline (with one participant operations and one from the marketing departments of each airline). However even after considerable contact airline executives were reluctant to be interviewed (see Appendix 4). This resulted in an amended research theme and subsequent research questions and interview questions to incorporate a wider array of tourism

sector stakeholders (asking tourism stakeholders of their views towards the airlines in regard to the research theme), in order to negotiate the lack of airline responses. It could be that airlines have very different views not represented in this thesis.

Only one participant of the entire 32 participants chose to make amendments to their interview transcript when approached for member-checking. None of the remaining 31 participants responded to such requests. Moreover, the sample size of 32 participants is a potential limitation. This is not representative of each sample of tourism sector stakeholders, but rather a convenience sample serving to cover a spread of views from major stakeholders. However, as an initial exploratory qualitative study it has provided a useful base covering the pertinent issues in the minds of stakeholders which would allow for either further qualitative research with larger samples or quantitative research.

5.10 Further research

Further research on the part of the airlines (or contracted agencies) would be required for the airlines to achieve a protracted understanding of:

(i) The disparities in stakeholder views (as uncovered in this thesis);
(ii) The extent of those disparities and the reasons for them; and
(iii) The measures which may be required to address these disparities and overall concerns.

This research may encourage further research regarding demographic issues in civil aviation in particular and tourism in general. Since there is a dearth of similar studies in the literature (though there is a corpus of literature regarding baby boomers and tourism in general) more research using similar or different methodologies may serve to enrich the current body of knowledge pertaining to the research question. Furthermore, increased research may serve to

investigate contradictory responses regarding such issues as the affluence of baby boomers. This affluence is confirmed in the literature and many participants in this research, but was challenged by some of the baby boomers themselves.

Another area worthy of further enquiry is the theme of comfort. There were variations in both the literature and the participants' responses regarding the comfort requirements of airline passengers, with most of the literature and the research indicating that airlines should improve comfort for baby boomer travellers. There was a similar situation in regard to premium economy class, where the literature identified premium economy class as more appropriate for business travellers but the participants identified this relatively new class of service appropriate for baby boomer travellers. Again, it must be pointed out that this paucity in the literature in regard to premium economy class may be related to the product's relative nascence amongst airlines. Airlines may currently be introducing it, if they have not already done so and others may be in the planning stages of introducing premium economy class.

Additionally, further research is required in aviation medicine. The literature warns of increased medical issues associated with the increased numbers of baby boomer air travellers as well as the increasing frequency of air crews calling for assistance from physicians (and other medical professionals) on flights to assist in dealing with in-flight medical episodes. Supporting this, the participants of this research expressed their concerns and some called for the provision of FOC (free-of-charge) travel for physicians who are willing to attend to in-flight medical episodes should they arise. This could be an area for consideration by airlines.

Moreover, this thesis could potentially serve as a useful base for further research in regards to the future effects of population ageing on not only in civil aviation but on other segments of tourism. Additionally, contexts of future works may lie geographically beyond Australia. For example, it may involve other nations experiencing low fertility rates and increasing tourism

services involving baby boomer travellers. For airlines to gain more generalisable data from potential research participants (from similar sources utilised in this immediate thesis, only with large numbers) quantitative research would be required, in which the application of statistics would contribute to the determination of measures to be enacted to achieve dynamic capability. Types of quantitative studies which may be conducted by the airlines could include:

Comparative studies, in which airlines conduct studies across stakeholder categories and in which cross-sectional comparisons between stakeholder categories (e.g. various age cohorts) are made. Quantitative methods may be applied in which stakeholder categories are asked sets of questions derived from the operational areas identified in this thesis (e.g. aviation medicine, customer service). Comparisons of views across the segments (or even within them) may be made. However, to achieve success in such an approach, appropriate sample sizes of participants would be required. Additionally, a problem is that airlines may not be willing to join in such research, as was experienced in the initial attempts prior to commencing the current work involved in this thesis and explicated in Chapter 3.

Full segment analyses, in which large numbers of participants would be required for a study which would analyse the age demographics of air travellers and their respective requirements. Again, as with comparative studies, numerical data could be extracted via quantitative methods of analysis in which comparisons across demographic categories could be determined. Again, ample sample sizes would be required.

5.11 Conclusion

This research examined the research question: "*How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying*"? The literature review led to the formulation of two research questions RQ1 & RQ2

which were presented to all 32 participants. With the application of an interpretivist epistemology, and instituting a qualitative positivist inductivist-deductivist methodology utilising semi-structured in-depth interviews, 32 participants (located in all Australian states and territories) representing nine tourism sector stakeholder categories including baby boomer travellers, were interviewed. Data collection took place utilising the interview instrument (Section 3.3) which was developed for this thesis.

Due to the increasingly competitive nature of civil aviation in which the growing practice of trade liberalisation by governments acts as an antecedent for more competitors to enter the civil aviation market (especially LCCs) pressure is mounting on established airlines, especially the legacy carriers such as Qantas to achieve competitive advantage. This involves strategic management during times of change. The literature identified dynamic capabilities (a paradigm and sub-field of strategic management) as the academic lens with which to interpret the findings of this research. Given that civil aviation liberalisation and subsequent competition are increasing, the need for airlines to become more dynamically capable to negotiate the changing markets is clear. The changes which the industry needs to respond to include the changing age demographics of air travellers and the already vast array of stakeholders involved and interacting with the tourism industries, including the airlines themselves.

The qualitative methodology utilising semi-structured interviewing extracted six new findings which generated new knowledge. These findings added to and improved the existing body of knowledge regarding the Australian tourism industries and their perceptions towards airlines' handling of the growing baby boomer market. Furthermore, there were supplementary findings to the current corpus of literature.

The findings for each research question were discussed and compared to the literature findings prior to the final conclusion for each research question. Contributions to this research were

highlighted, demonstrating how this qualitative study has improved the existing body of literature and knowledge. The implications of the research to airlines' policies and practices were discussed, followed by a discussion regarding the limitations of this research, which should be considered before applying the research findings in other pieces of work.

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APPENDICES

APPENDIX 1: Information sheet

INFORMATION SHEET

Name of project: **How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying?**

My name is **JOHN AYOUB**, I am conducting research as part of my Doctor of Business Administration (DBA) degree in Aviation Management at Southern Cross University. My research project is titled:

How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying?

I have accessed your organisation's details from the travel trade and proceeded to contact the switchboard operator to ascertain who would be most appropriate for this research.

This research involves a study regarding the Australian tourism industry (including aviation) and the perceptions of the industry regarding the effects of the declining birth rates on civil aviation in Australia. The research will discuss the ageing demographics of airline travellers, namely the baby boomer generation, and the associated awareness of senior airlines' management (example operations and marketing) regarding this phenomenon. This thesis will further explore the readiness of airline management in understanding the intricate and unique requirements of this growing cohort of travellers, as well as the perception of other industry stakeholders regarding the airlines' readiness to handle these changes.

This research will involve a face-to-face interview, where I would like to explore this theme and your views.

Your privacy and that of your organisation will be assured through anonymity. Provision of any refreshments and travel expenses (such as cab fares) will be made by myself should you wish to meet outside your regular meeting place.

It is hoped that the research would benefit the wider community (should new knowledge be established) in that it may produce:

- Greater recognition on the part of the baby boomer generation of consumers of efforts being made by airlines to meet their unique requirements.
- Greater confidence in the local aviation industry, including greater brand recognition/loyalty.
- More travel comfort and easier/smoother airport access and processing.
- It would benefit those who take part by a summary which I will provide of the major issues

Participation is totally voluntary. You will be invited to discuss a range of themes related to this issue which I the Researcher will take note of in writing. It is expected that the interview itself will take 30-60 minutes. You are free to cut the interview short should you not wish to continue for any reasons which you are not obligated to provide.

The results of this study may be published in a peer-reviewed journal and presented at conferences, but only group data will be reported. Your identity and that of the airline will remain confidential. Data will be stored in electronic data bases and hardcopy notes in a home-safe for a period of seven (7) years to comply with University requirements.

Should you have any inquiries regarding this research, you are encouraged to contact either myself (02 **9703 0570** or **0411 14 06 14** or **johnayoub@optushome.com.au**) or my Supervisor, Dr. James Cowley (**0411601789** or **crick@ozemail.com.au**). You may also contact Southern Cross University's Higher Research Ethic Committee (HREC) on 02 6626 9139.

You will be entitled to request feedback from the study. You may request to receive a summary of the results of the interview by email or mail. Such provision may be made in a hard-copy consent form. Leave you contact details in the form when returning to myself.
This research has been approved by the Human Research Ethics Committee at Southern Cross University. The approval number is **ECN-10-088**

Should you have complaints or concerns with regards to my conduct or the conduct of the Research itself, you are encouraged to contact the Ethics Complaints Officer, whose details are below:

The Ethics Complaints Officer
Southern Cross University

PO Box 157

Lismore NSW 2480

Email: ethics.lismore@scu.edu.au

All information is confidential and will be handled as soon as possible.

APPENDIX 2: Consent form

CONSENT FORM

Reminder: the consent form is RETURNED to the researcher

Title of research project: "**How do Australian-based tourism stakeholders perceive the readiness of the aviation industry to handle increasing numbers of baby boomers flying"?**

Name of researcher: **JOHN AYOUB**

Name of Supervisor: **DR JAMES COWLEY**

(*Contact details of the researcher and the supervisor are contained in the information sheet about this research)*

***NB to Applicant/Researcher/Supervisor: Please remove any statements that are not relevant to your research before submitting for approval.**

***Make the consent form SUITABLE to your research.**

NOTE: This consent form will remain with the Southern Cross University researcher for their records.

Tick the box that applies, sign and date and give to the researcher

I agree to take part in the Southern Cross University research project specified above. Yes ☐ No ☐

I have been provided with information at my level of comprehension about the purpose, methods, demands, risks, inconveniences and possible outcomes of this research, including any likelihood and form of publication of results. Yes ☐ No ☐

*I agree to be interviewed by the researcher? Yes ☐ No ☐

*I agree to allow the interview to be *audio-taped and/or *video-taped Yes ☐ No ☐

*I agree to make myself available for further interview if required Yes ☐ No ☐

*I agree to discuss questions concerning the Airline's Plans with regards to meeting the requirements of Baby boomer Travellers **OR** Yes ☐ No ☐

*I agree to discuss questions concerning the organisation's (or my personal – for individuals) perception with regards to airlines' ability to handle the growing cohort of Baby Boomer Air Travellers

I understand that my participation is voluntary. Yes ☐ No ☐

I understand that I can choose not to participate in part or all of this research at any time, without negative consequence to me. Yes ☐ No ☐

I understand that any information that may identify me, will be de-identified at the time of analysis of any data. Therefore, any information that I have provided cannot be linked to me (*Privacy Act 1988 Cth*) Yes ☐ No ☐

*I understand that neither my name nor any identifying information will be disclosed or published *(**delete this statement if the study is completely anonymous)*. Yes ☐ No ☐

I understand that all information gathered in this research is confidential. It will be kept securely and confidentially for 7 years at the University. Yes ☐ No ☐

I am aware that I can contact the supervisor or researcher at any time with any queries. Yes ☐ No ☐

I understand that the ethical aspects of this research have been approved by the SCU Human Research Ethics Committee. Yes ☐ No ☐

If I have concerns about the ethical conduct of this research,

I understand that I can contact the SCU Ethics Complaints Officer Yes ☐ No ☐

Participants name:

Participant's signature:

Date:

☐ Please tick this box and provide your email address or mail address (confidential) below if you wish to receive a summary of the results:

Email: _____

Mailing address:

_____

APPENDIX 3: Chapters II and III academic search engine entries

Key words	Journal(s)
Airline* & demographic* research	Travel trade gazette UK & Ireland
Airline alliances & baby boomers	
Aviation & demographic* research	Travel trade gazette UK & Ireland
Airport & passenger	Risk analysis: an international journal
Airport* & travellers	International journal of hospitality and tourism administration; Journal of air transport management
Airport* & wayfinding & traveller*	Acta touristica; Cultural geographies; Journal of transportation engineering
Air travel & DVT & older	Journal of travel medicine
Air travel & hypoxia & older	
Air travel & medical & older	International journal of cardiology; Respiratory medicine
Air travel & syncope	Journal of neurology, Neurosurgery and psychiatry; Australasian psychiatry: Bulletin of royal Australian and New Zealand college of psychiatrists
Australian universities & tourism	Journal of hospitality, leisure, sport & tourism education; Journal of teaching in travel & tourism
Baby boomer* & airline*	The journal of historical research in marketing; The journal of services marketing
Baby boomer* & airline* & customer service	
Baby boomer* & air travel	Nursing forum;
Baby boomer* & air travel & health	Journal of revenue & pricing management
Baby boomer* & IT & travel	Annals of leisure research; Journal of travel research
Baby boomer* & income & tourism	Annals of tourism research; Book; Thunderbird international business review
Baby boomer* & travel & health	
Baby boomer* & tourism & innovativeness	Journal of consumer marketing
Baby boomer* & travel & innovativeness	Journal of consumer behaviour; Journal of travel research;
Baby boomer* & travel & propensity	Journal of historical research in marketing; Journal of hospitality & tourism research
Deductive inductive methodology	Journal of engineering mechanics; Journal of management history
Deductive inductive & qualitative method	
Demographics & aviation medicine	British medical journal
Disease & air travel & baby boomer	Nursing forum
Dynamic capabilities & strategic management	Journal of management; International journal of management reviews; Industrial and corporate change; International Journal of Innovation Management; International journal of management reviews
Dynamic capabilities & management & leadership	Organisation science; Information and management; Information systems research; Journal of management; Strategic organisation; British journal of management; The academy of management review; strategic management journal
Dynamic capabilities & management	Strategic management journal; Industrial marketing management
Dynamic capabilities & airline(s)	European business review; European management journal; Journal of service management; Strategic management journal; Decision support systems
Dynamic capabilities & civil aviation	
Dynamic capabilities & change management	Journal of management studies
Epistemology & ontology & tourism	Annals of tourism research
Flight & comfort	Applied ergonomics

APPENDIX 3: Chapters II & III academic search engine entries (Continued)

Ground handling	Research in transportation business and management
Grounded theory & purposive sampling & tourism	Journal of hospitality marketing & management; International journal of tourism research
In-depth interview* & positivist	
In-depth interview* & qualitative & inductive & deductive	
Inductive deductive	International journal of qualitative methods
Innovation & baby boomer & aviation	Journal of hospitality management
Method & Methodology & research	Nurse researcher
Need for strategic management	International journal of sustainable strategic management; Qualitative research in organizations and management: An international journal;
Need & strategic management	International journal of management reviews; Strategic management journal; Entrepreneurship theory and practice; Organizational research methods; International journal of business science and applied management
Old traveller* & flight*	
Old traveller* & flight* & charter*	Journal of air transportation worldwide; Journal of vacation marketing
Open skies & Australia	Journal of marketing theory & practice
Positivist qualitative & inductive deductive	Qualitative social work
Positivist & qualitative & inductive deductive	The handbook of information systems research, Management research review; Nursing forum;
Premium economy	Air transport world; Journal of air transport management
Premium economy & Baby boomer*	
Premium economy & demographic*	
Premium economy & demography	
Qualitative deductive methodology	
Qualitative & tourism & sampling	Journal of sustainable tourism
Qualitative research & validity	Journal of management studies; Quality & quantity
Qualitative coding & grounded theory	The qualitative report
research design* and research method* and methodology	Journal of business & economics research; journal of travel research
Strategic management & dynamic capabilities & airline*	Long range planning; Strategic management journal; Tourism management
Strategic management & requirement*	Journal of marketing management; Academy of management review; Strategic management journal
Strategic management & Manager*	Journal of management studies; Entrepreneurship theory and practice
Strategic management & airline*	Strategic management journal; Technology analysis & strategic management; Irish journal of management; Management decision; Transportation research part E: Logistics and transportation review
Strategic management & theories	Academy of management learning & education; Journal of management; Industrial and corporate change; Strategic management journal
Tourism education	Annals of tourism research

Source: Developed for this research

Appendix 4: Chronology of unsuccessful attempts to gain airline interview participants- RA denotes regional (Australian) airlines, IA international airlines (operating to and from Australia) and DA (Australian) domestic airlines)

Airline	Dates of contact attempts	Airline description	Brief chronology of events
RA1	05th JUL 2010-13th SEP 2010	Regional airline	After initial contact, two voicemail messages left and two e-mails sent. Final communication received from the airline advising unable to assist.
IA1	5th JUL 2010 - 30th AUG 2010	Middle East-based airline	After initial e-mail to the Marketing Executive. Follow-up phone call and e-mail. Executive considered assisting. After a further follow-up e-mail, the Executive e-mailed advising unable to assist.
IA2	5th JUL 2010 - 04th AUG 2010	Middle East-based airline	Initial email to the Sales Representative. Two follow-up e-mails. Final e-mail from the Sales Representative advised unable to assist.
IA3	5th JUL 2010 - 14th JUL 2010	South East-Asian based airline.	Initial e-mail sent to the Marketing Executive. Follow-up e-mail sent. Final e-mail advised unable to assist.
IA4	14th JUL 2010 - 28th JUL 2010	North American-based Airline	Called SYD Airport Duty Supervisor. Two follow-up e-mails sent. No response. No further communication.
IA5	5th JUL 2010 - 04th AUG 2010	South Pacific-based airline	Initial e-mail to Marketing Executive. Follow up e-mail sent. Marketing Executive e-mailed advice: unable to assist
DA1	5th JUL 2010 - 18th AUG 2010	Australian low cost airline	Initial e-mail to staff member who forwarded the e-mail to a senior. Follow-up e-mail sent twice. No further communication.
DA2	5th JUL 2010 - 23rd SEP 2010	Australian low cost airline	Initial e-mail to Marketing. Follow up e-mail sent. E-mail from Marketing Coordinator. Unable to assist.
IA6	5th JUL 2010	European-based airline	Sent e-mail to Sales Representative who advised that Marketing/Operations departments are located off shore in the home country. No further action was taken.
IA7	5th JUL 2010	Asian-based airline	Sent email to generic e-mail address requesting assistance. No response. No further action taken.
IA8	5th JUL 2010	Asian-based low cost airline	Overseas-based staff took details and advised would send an e-mail to relevant Management. No response. No further action taken.
IA9	5th JUL 2010 - 20th AUG 2010	North American-based airline	Two attempts through reservations Staff until relevant contact was established. Three further attempts were made to speak to the General Manager. Final e-mail from the airline advised unable to assist.
IA10	27th JUL 2010 – 16th SEP 2010	Asian-based airline	Marketing Officer will ask Marketing Manager to return call. Two attempts to contact Marketing Manager, left messages. E-mail from Marketing Officer advising unable to assist. Lead from interviewed Sales Executive from A4. E-mail sent to Sales Executive of IA10. No further action taken.

Appendix 4: Chronology of unsuccessful attempts to gain airline interview participants (continued)

IA11	27th JUL 2010 - 25th AUG 2010	African-based airline	Contact made with Sales Executive, who was unable to assist and tried to locate a relevant contact. Airport Officer reversed an earlier decision to assist due to time constraints
IA12	27th JUL 2010 -20th SEP 2010	African-based airline	Staff referred researcher to the General Manager who was e-mailed. Two follow-up phone calls made and a final voicemail left. No further action at taken.
IA13	27th JUL 2010 - 04th AUG 2010	Asian-based airline	Spoke to the Marketing Executive. E-mail sent. Marketing Executive finally advised unable participate.
IA14	27th JUL 2010 - 30th DEC 2010	South American-based	Sales Executive advised General Manager details. Follow-up e-mail sent twice. Final e-mail from airline advised unable to assist.
IA15	28th JUL 2010 - 29th JUL 2010	North American-based airline	Spoke to a Staff member and sent a follow-up e-mail. Return e-mail received advising unable to assist
IA16	04th AUG 2010	Pacific-based airline	Contacted Personal Assistant of the General Manager. E-mailed returned advising that airline operations would not warrant validity for this research, as the airline only operated to one market for Australians.
IA18	06th AUG 2010 - 12th AUG 2010	Asian-based airline	E-mailed Marketing Manager. Left a message with a Staff Member for the Marketing Manager. No further action taken.
IA19	06th AUG 2010	European-based airline	E-mailed marketing manager. No response.
IA20	06th AUG 2010 - 16th NOV 2010	North American-based airline	E-mailed Sales & Marketing Manager. Spoke personally to the Sales & Marketing Manager. Two interview dates were set (after the first was postponed). Upon reconfirming the second appointment, advice was given by the Sales & Marketing Manager that he was very busy and to contact later. No further action taken.
IA21	06th AUG 2010 - 11th AUG 2010	European-based airline	E-mailed Marketing Executive. Marketing Executive advised by e-mail that She would pass my e-mail to a higher Manager for consideration. No further action taken.
IA22	11th AUG 2010	Asian-based airline	Spoke to and e-mailed Marketing Executive who advised his doubt that management would be interested in assisting. E-mail was undeliverable despite correct address. Later left a message for the Marketing Executive, no return. No further action taken.
RA2	11th AUG 2010 - 15th SEP 2010	Regional airline	Three messages left for the Head of Commercial. Contact made with the Chief Operating Officer. Despite an initial phone call from the Head of Commercial in which he stated an in-principal interest to assist, a later e-mail from Chief Operating Officer advised difficult to assist.

Appendix 4: Chronology of unsuccessful attempts to gain airline interview participants (continued)

RA23	16th AUG 2010 - 20th AUG 2010	Asian-based airline	Left a message for Sales Executive who called back. Request was discussed and an e-mail sent containing the questionnaire and HREC details. Left a message for the Sales Executive. No further action taken.
RA3	16th AUG 2010 - 22nd DEC 2010	Regional airline	Spoke to a Staff member. E-mail sent. Three messages left for supervisor. No further action taken.
RA4	16th AUG 2010 - 23rd DEC 2010	Regional airline	Spoke to the Sales Executive. E-mail sent. Left three messages until a new Sales Executive e-mailed back to state she's not interested.
IA24	17th AUG 2010 - 08th SEP 2010	Near Eastern-based airline	E-mailed the Australian General Manager. Left message on voicemail. Visited the General Manager at the airline office where he agreed to consider. Two follow up e-mails sent with no responses. No further action taken.
IA25	20th AUG 2010 - 08th SEP 2010	Asian-based airline	Two messages left for Executives. E-mailed information. No response. No further action taken.
IA26	20th AUG 2010 - 23rd DEC 2010	North American-based airline	After initial contact with Staff, three e-mails sent to an Executive. No response. No further action taken.
IA27	20th AUG 2010	Pacific-based airline	Reservations Staff member advised that all Operations/Marketing are handled from overseas office. Unable to assist.
RA4	20th AUG 2010 - 13th SEP 2010	Regional airline	Marketing Staff were initially unavailable. E-mail sent. E-mail from Executive advised unable to assist.
RA5	20th AUG 2010 - 24th AUG 2010	Regional airline	E-mailed admin. Admin Officer e-mailed back to advise unable to assist
IA28	20th AUG 2010 - 25th AUG 2010	Pacific-based airline	Spoke to Sales. E-mail sent. Return e-mail advised unable to assist
GSA	04th AUG 2010 - 08th SEP 2010	Major General Sales Agent (GSA) representing multiple airlines European, Asian & Pacific based airlines.	E-mail contact made with a Senior GSA Executive regarding access to relevant airline Managers for interviews. Despite follow-up e-mails, no interview appointments materialised. No further action taken.
IA29	10th JAN 2011	North American-based airline	Spoke to the Sales Executive. Questionnaire & HREC advice e-mailed. Executive to consider. No response. No further action taken.
IA30	07th MAR 2011 - 14th MAR 2011	European-based airline	Sent an E-mail to Sales Executive after initial face-to-face discussion. Second e-mail sent. No response. No further action taken.

Source: Developed for this research