



# CAREER JOURNEYS OF ADULTS 35 AND OLDER

December 2018



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# Background

Currently, people are living longer, and people are working into their later years, with the possibility of having more than one career in their lifetime.

The centuries-old pattern — to work at the same job or profession right up to retirement — is becoming obsolete.

In its place: a career path marked by new jobs, new starts, even new businesses, continuing for as long as one has a passion or need for work.

The proof is in the data. For example, one study shows that 40 percent of people working at age 62 had changed careers since they turned 55.\*

*Disclaimer - Focus groups are a tool to gain insights into how and why people think the way they do. However, it is important to note that focus groups are directional in nature and not projectable onto a larger audience.*

\*Source: Sonnega, A., McFall, B.H., & Willis, R.J. (2016). Occupational transitions at older ages: What moves are people making? Retrieved from <http://projects.isr.umich.edu/mrrc-archive/publications/papers/pdf/wp352.pdf>.

# Objectives

Assess/explore career changes among the 35+ population, including but not limited to:

- Number of times a person changed careers
- Reasons for moving from previous career to new career or thinking about making a career change in the future
  - Type of work
  - Learn new skills
  - Receive pay increase
  - Receive less pay
  - Work in a different industry
  - Better benefits
  - More flexibility
  - Less responsibility
  - Increased security
- Life stages or milestones that might impact career change(s) (i.e., having a baby, moving, getting married, reaching retirement age, losing a spouse)
- Differences between generations (Silent, Boomers, Gen X, Millennials)



# KEY FINDINGS

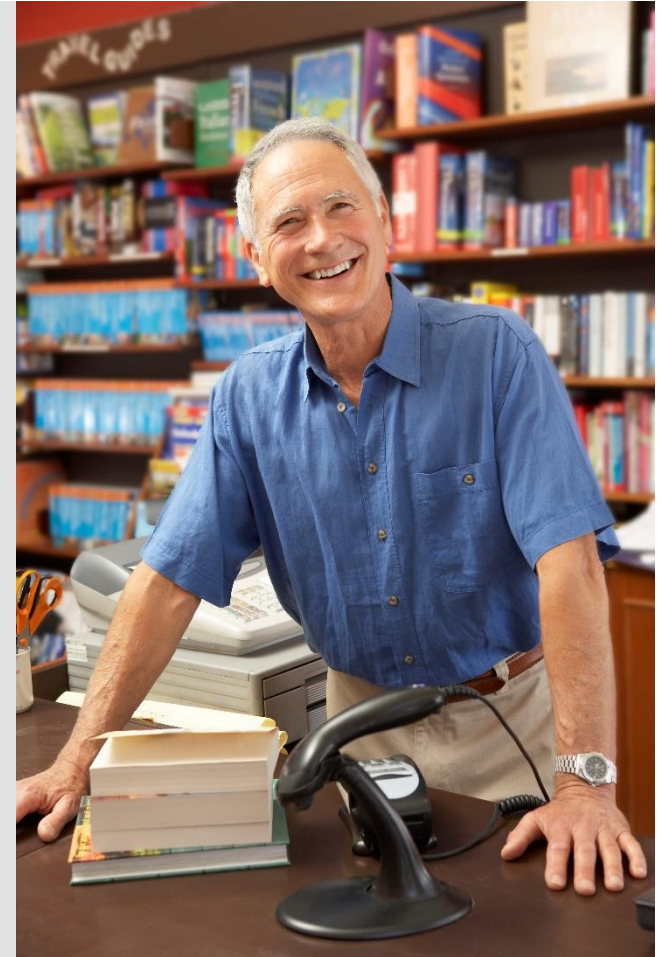


# Key Findings

**Careers** are viewed as lifelong occupations that allow the individual to grow professionally and advance within the hierarchy of a company and/or industry.

**Jobs** are perceived to be 9 to 5 work days, are task driven, and simply are a means to a weekly paycheck. Longevity is not expected but when it does occur, the scope of the job remains the same.

**Job Change** happened many times and across many industries. Respondents reported switching jobs anywhere between 3 and 21 times. **Career Change** occurred less frequently and each time with the intention to remain and advance. Most respondents reported being on their second or third career.



# Key Findings (Cont.)

For some, it was their own **choice** to change careers, but more often than not, the change occurred due to **unforeseen circumstances**.

In this case, five **general themes** surfaced as reasons for changing career paths:

**Health** — injuries or chronic illness/condition

**Relationships** — cohabiting, marriage, divorce

**Conflicts** — personalities, management, change in office team dynamics, change in overall office tone

**Layoffs** — bankruptcy, eliminating departments/positions

**Dissatisfaction** — bored, unfulfilled, not the right fit, no passion

**Career transitions** were effortless and seamless for some, but for others, the transition required formal training or an entirely new college degree.



# Key Findings (Cont.)

Respondents tended to see any challenges they encountered as they were making their next career move not as **barriers** but simply as part of the process. It wasn't until they were asked to analyze their journey that they identified any obstacles.

Older respondents had the biggest adjustment to make in the career change process because they were **used to a different job market landscape when applying for a job**. Today, the application process happens online, at times with no acknowledgment or response to the applicant, which made the process more frustrating for them.





# Key Findings (Cont.)

Everyone wants to make a comfortable living, but respondents sought more than money: They wanted to find a job or a career that provides stability, a constant challenge, and a sense of purpose.

**Younger** respondents (ages 35-54) seemed to be driven innately to seek out this sort of job or career, and they were willing to jump from job to job without much concern about instability or risk.

**Older** respondents (ages 55-74) took a different view. They were brought up to value stability and stay with a position or a career until they retire. Eventually, however, they also began seeking careers that were congruent with their passion.

It's important to mention that **neither group of respondents was driven by money**. They wanted something more; they needed to be happy in their careers.







# DETAILED FINDINGS

# Changing Career vs. Changing Jobs

Respondents are clear and agree on the differences between a career and a job change.

**Careers** are seen as a progression toward a lifelong goal and **long-term** personal aspiration. Career choices are based on factors that go beyond monetary benefits and the focus is more on sharing and growing a passion.

**Jobs** are merely performing an activity and viewed as short-term. For the most part, jobs are seen in a narrow dimension, viewed solely as a means to get a regular paycheck.

*“Sometimes you had to have a job because you had to have a job. Your passion wasn’t there. You took it because it was the only thing available. A career is something you’re happy with; you put all of your energy into — life and soul into it.” (James, 48)*

*“A career is something you want to build on and keep going at. A job is a 9 to 5; you go home and you forget about it. A career, you put your whole life into . . . You put more time and effort into a career because you want to build it.” (Nina, 70)*



# Most Have Changed Jobs More than They Have Switched Careers

Once they started their careers, most respondents have used “jobs” to support themselves between career moves.

While most reported changing jobs between **3 to 7** times, a few reported having held as many as 26 different jobs in their lifetime. These jobs helped put them through college, helped them survive between careers, were back-up plans during transitions, or were simply interesting enough to hold on to as a part-time or side gig.

Each job reportedly lasted only a couple of years or months and, in some cases, weeks.



*“I guess you could say I’ve had 25 or more [jobs], because I wasn’t sure what I wanted to do.” (Deborah H, 64)*

*“Bartending . . . you can’t beat the money. Great money when I was going to school. They’d work around my hours. I’ve always had bartending to fall back on. Always, up until a month ago, I would still bartend — I have never stopped. The money is great. I like the people.” (Christine, 48)*



# Career Moves Are Less Frequent and More Strategic

Respondents changed careers because they decided they needed a change or circumstances beyond their control forced them to do so. Therefore, they indicated taking more time, being more cautious, and perhaps selective in the opportunities they chose to pursue.

A person can go through multiple career changes in their lifetime and each time can be for a different reason and under different circumstances. Most reported being on their third or fourth career.

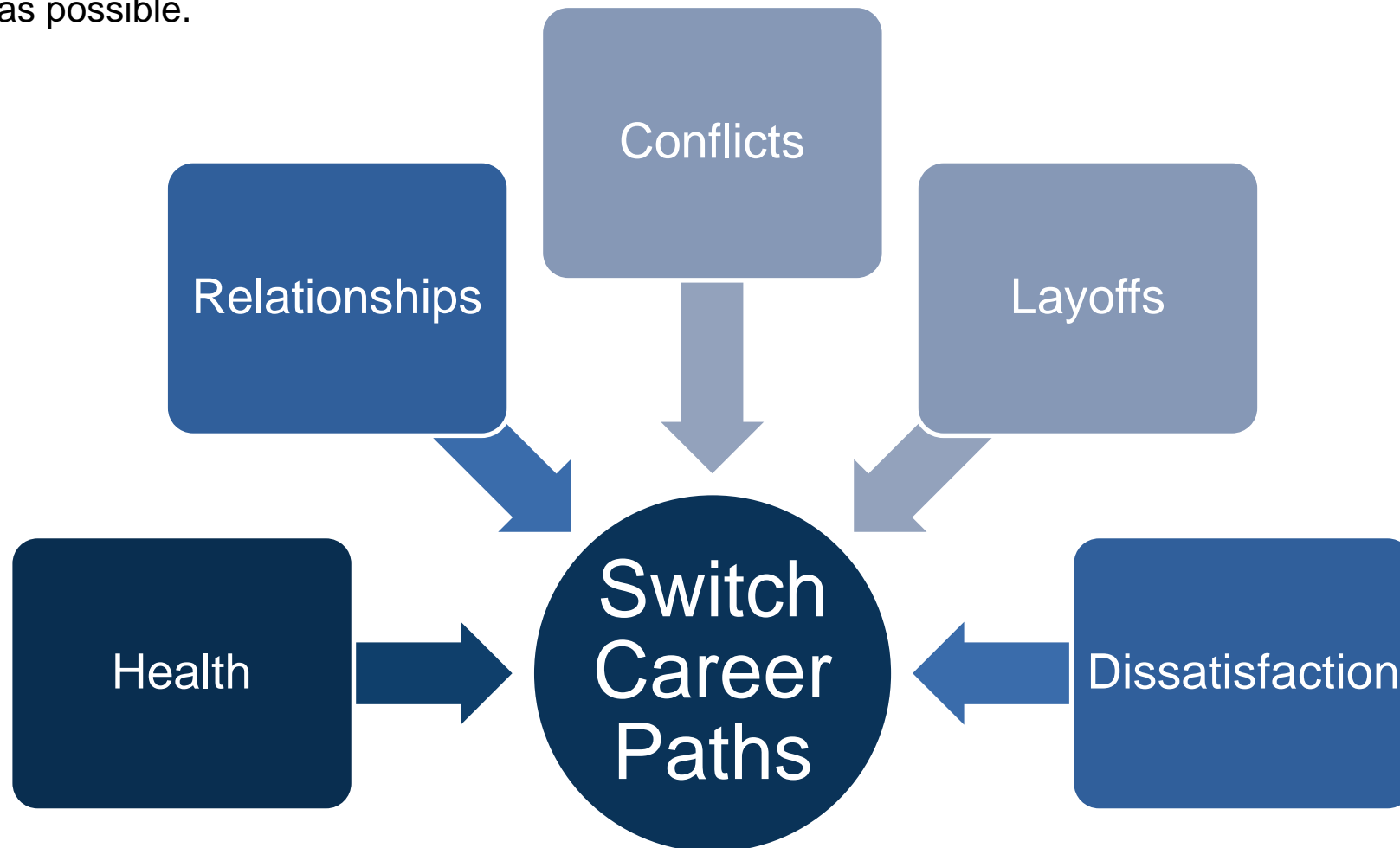
*“...[This time around, I’m] taking my time...don’t want to go into a company and hate it.” (Leann, 36)*

*“Tobacco industry marketing companies pay well [severance] . . . it wasn’t a huge crisis to get a new job. I was able to take my time and look.” (Eve, 47)*



# Career Change Was Propelled by 5 Underlying Themes

Those who were fortunate enough to receive a significant severance package had the opportunity to take their time in searching for and deciding on their next career move. In contrast, those who did not felt more pressured to find a new career as soon as possible.



# Health-Related Issues Forced Change in Careers

**Job injuries** prevented some respondents from continuing in the same line of work due to their new physical limitations.

**Chronic health conditions** caused some to take time off work or be off work indefinitely at that time.

A few respondents had to **care for their ailing parents**, which meant they had to stop working, move, or shift their focus temporarily.

*“The physical demands [of my job] took a toll on my body. The wear and tear on my body was accumulating, so that made me start looking for something else. Once I suffered my injury I had to look to do something else, and that’s when my career as a security officer came into play.” (Eric, 55)*

*“I was in total panic, my life as I knew it changed. I couldn’t continue that type of living. I ended up getting three epidurals in my spine to alleviate the pain. It kept getting worse. I was forced to give up the business.” (Brian, 67)*





# Relationships Influenced Career Paths Taken

**New relationships** led to new adventures either by moving to a new state or starting a joint venture with a new partner.

**End of relationships** brought on more life changing decisions, such as deciding whether or not to move. In most cases, that single decision affected the career they kept or started in the next chapter of their lives.

**Divorce** often forces one to reassess all aspects of life. If children are involved, it adds another layer of complexity. Some women were forced to enter the workforce again or for the first time. The financial aspects of divorce forced some men to change/modify their careers. If children were involved, custody schedules also led to new careers or career changes to allow for more flexibility in daily schedules.



*“New boyfriend got a job offer to move to San Francisco. . . . We ended up moving to San Francisco and started working for the same company in different cities. He covered Oakland and I covered San Francisco area.” (Eve, 47)*

*“I got divorced after 6 years and moved to Jersey. When I moved here I went back to work full time and needed to find something that would have me home when my daughter got out of school. So I got into the Direct Mail Industry.” (Nina, 70)*

# Friction and Change at Work Led to Career Moves

**Conflicts** at the office, specifically with direct superiors, led to resignations and job searches.

**New managers** caused some respondents to resign because of the new management style, friction in personalities, or changes in group dynamics.

A few sought the opportunity to promote out of the department or to move laterally within the company. However, most were not so lucky and opted to leave.

*“My boss decided to hire back the person I had replaced in similar role. Needless to say I was not overly pleased. Once I got word this person was starting, I began active search trying to find opportunity to get out of situation.” (David, 73)*

*“My General Manager at...who discriminated against my sexual orientation . . . I was passed up for a promotion on two occasions . . . I left to work for another hotel.” (Jason, 38)*

*“I got a job at the Auto Club. I loved it. Data entry was great. It was individualized; ‘here is your stack of stuff’ — I was good at it. I left because of conflict with boss; otherwise, I would have stayed.” (Debra S., 57)*



# Company and Department Closures Ended Careers

**Layoffs** came as a shock to many who were terminated due to closing or restructuring of the company.

Mergers and buyouts caused restructuring, which in turn caused some departments and/or positions to be eliminated. While a few said that they expected it based on the events leading up to the layoffs, most said they were surprised when they found out the company was closing its doors.

Needless to say, most had no plan in place and job search was at the forefront for most. A few were fortunate enough to have received a hefty severance package, which bought them time and allowed them to search for a job they really liked.



*“They merged. The position was eliminated, the whole department was eliminated. They hired somebody cheaper. She brought in her people. It was a total shock because all employees they let go had been there for 12-plus years. This woman got in there in November and we got let go in April. . . . I was shocked, dumbfounded, thought I’d be there forever!” (Marilu, 51)*

*“Next move was imposed on me. Corporation merged two divisions. All but one of the management team got laid off, I was one of them. Out of the blue. Had some inkling there was going to be reorganization, but didn’t know the scope of it.” (David, 73)*



# Dissatisfaction Led to Seeking an Alternative Career Path

To be enthusiastic about what they do, people need to find passion in their careers. Being happy, challenged, and motivated by what they do is extremely important. So much so, that for a few, this need surpassed the monetary benefits that their career offered. Therefore, they did not hesitate to walk away from a position and salary that most could only dream of.

*“I was a data analyst for NASA for 5 years. Best experience of my life. . . . I was too creative for my job . . . I was getting bored. I gave two months’ notice, but I started looking a year before I quit. It is very important for me to be able to be creative and have my voice heard/have impact. I went into Marketing.” (Sophia, 35)*



# Transitioning into a New Career Was Effortless for Some

Respondents were split between those who had a smooth and seamless transition and those who struggled to get to their next career move.

For some, opportunities found them; they had connections and only needed to apply their transferable skill(s), or they were simply trained in-house. In any case, making a career move for them was easy and with minimal downtime, if any.



*“Someone I went to school with started a company. We met at the gym or somewhere like that and talked about what was going on. He offered me a job and I thought it was a good fit and the opportunity I was looking for.” (Eric, 55)*

*“At the time the world was in great shape. A lot of property needed landscaping. I said it’s time to make that career change. With the help of my son and a small crew we were picking up \$20,000, \$30,000 and \$40,000 jobs left and right. . . . I had a good crew. We did great work and people would see it. I did some advertising and was getting into the Internet. Everything was smooth and was going great.” (Brian, 67)*

*“Receptionist job ended up morphing into a new career. I ended up being their Branch Operations Manager. Not a struggle at all. It just worked.” (Christine, 48)*

# The Road to a New Career Was More Challenging for Others

Others found themselves traveling a windier road to get to their next career. But need, determination, and confidence kept them focused and got them to their next career destination.

The steps that several needed to take included:

**New degrees** — Whether it was finishing their first degree, getting a new degree, or continuing with graduate degrees, several had to go back to school in order to change careers.

**Interim jobs** — Some had to take entry-level jobs to get their foot in the door and do what they wanted to do. Some had to work several odd-jobs to support themselves until they found their next career opportunity.

*“I had to support my son. Secretaries barely make minimum wage in Texas. Teachers don’t get paid much but housing is cheaper in Texas. My parents had one-bedroom house where we lived until I graduated. College was 45 miles away. Son brought homework with him. Saturday 7:30 AM class, son in lounge area and sleeping while I was in class. I was 40.”(Debra S., 57)*

*“I ended up having to move back to my parents’ house for a little bit because I didn’t have enough money. . . . I ended up working at Apple for a couple of years doing retail, just to have some financial stability . . . I decided to go back to school for UX design.” (Krisana, 37)*





# Obstacles and Barriers to Changing Careers

Interestingly, any hurdles encountered were only identified in retrospect. During the career change, respondents were simply going through the process and were too focused on the end result to recognize barriers and obstacles.

Very few felt they encountered anything that detoured them from their new career path. Most “fell into” their new career. Some carved their own path once they identified their passion. Others took it in stride and viewed it as a journey.

Those who identified any kind of obstacle along their career paths, mentioned the following:

**Family** — Starting a family (sometimes unexpected and sometimes planned) detoured some from going into the career they really wanted to pursue when they wanted to. A few never went back to the original plan and simply made a career of the path they chose at that time.

**Financial Limitations** — A few had to put their plans on hold or take a different career route because they did not have the financial means to pursue a new degree.

**New HR Landscape** — HR communications are primarily done online as opposed to one-on-one interactions. Older respondents found it more challenging to navigate the online process.

**Importance of Networking** — The importance of connecting with people was a key realization for some while searching for new career opportunities. They discovered that it's *who you know* that matters.



# Obstacles and Barriers to Changing Careers (cont.)

Surprisingly, **age** was never a concern or consideration when thinking of starting a new career. Confidence and experience provided reassurance.

Respondents seemed always to focus on the end result, on what career they wanted. Age didn't seem to matter: Some switched careers at 25 and others switched at 56. Certainly after retirement, a few embarked on new ventures at the age of 65+. The drivers were passion, happiness, and determination.



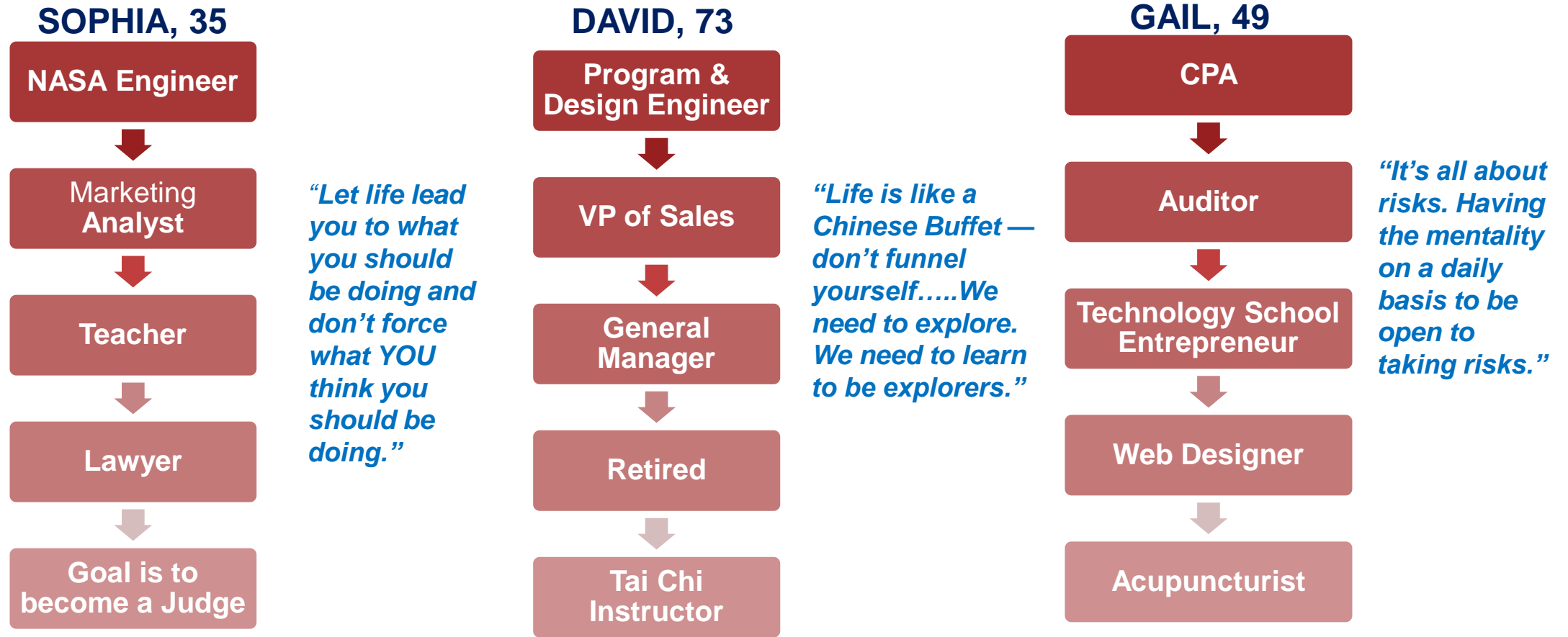
*“I stayed longer than I wanted. I intended to go to college, but realities of life kept me on the job. I had a daughter. I needed to provide for my daughter, so had to make that sacrifice.” (Eric, 55)*

*“Back in my day, you looked for a job, got a newspaper, do more face-to-face interviews, more positive results. Now you apply online, it’s going through space so you’re not getting as many responses. . . . It’s crazy to me.” (Marilu, 51)*

*“I didn’t know what resources were available. Some assistance given by Unemployment Office, but most was my own research at library. I wish I would have been more open to reach out to others. . . . it could have accelerated the [job search] process. It took a year.” (David, 73)*

# Fascinating Career Journeys

All respondents had their own stories to tell and were in some way inspirational, enlightening, and at the time, unconventional. However, the following three individuals stood out due to their unexpected and surprising journey to their existing careers.







## METHODOLOGY AND RESEARCH DESIGN

# Methodology and Research Design

20 one-hour telephone in-depth interviews were scheduled at the convenience of each respondent between November 24 and 30, 2018. Respondents included a mix of genders and race/ethnicities\*, and represented various regions across the country.

## AARP – National Recruit (Mix of Urban, Suburban and Rural)

| Research Plan    | Northeast |       | West  |       | Midwest |       | South |       | TOTAL     |
|------------------|-----------|-------|-------|-------|---------|-------|-------|-------|-----------|
|                  | 35–54     | 55–74 | 35–54 | 55–74 | 35–54   | 55–74 | 35–54 | 55–74 |           |
| Total # of IDs   | 2         | 3     | 3     | 2     | 3       | 2     | 2     | 3     | <b>20</b> |
| <b>Female: 9</b> | 0         | 1     | 2     | 0     | 2       | 0     | 2     | 2     |           |
| <b>Male: 11</b>  | 2         | 2     | 1     | 2     | 1       | 2     | 0     | 1     |           |

\*Northeast (Whites-3, Hispanics-1, Asians-1); West (Whites-2, African Americans-1, Hispanics-1, Asians-1); Midwest (Whites-2, African Americans-1, Hispanics-1, Asians-1); South (Whites-3, African Americans-1, Hispanics-1).





## APPENDIX



## **Career Change In-Depth Phone Interviews**

### **Discussion Guide - 60 minutes**

**DRAFT VERSION 3.0 – November 19, 2018**

#### **INTRODUCTION & DISCLAIMER (10 minutes)**

Thank you very much for being willing to participate in this phone interview today. My name is Patricia. I'm calling you from Los Angeles, California. We truly appreciate your time and participation.

This interview is being recorded for report writing purposes only. All information will be kept confidential. Any information you share will be used in an aggregate form in the report, meaning your name will never be used.

Please feel free to ask questions at any time

Today we are speaking with people from different parts of the country to learn about their interests, motivations, and career choices/paths. There are no wrong or insignificant answers. We are truly interested in learning your story and what/how you got to your current career choice.

Let's start by having you tell me a little about yourself: Where you live. Who you live with. Any children and their ages. Interests/hobbies/passions. Current career – *we'll circle back and discuss in full detail later in the discussion.*

### **PREVIOUS CAREERS (35 Minutes)**

Let's turn back time for a bit, and talk about your career choices. How many jobs have you had since you were 21? How many times have you changed careers? In your opinion, how if it all, is a "career" different from a "job"? What does it mean to change careers and how is that different from changing jobs, if at all?

Your current career is move number\_\_\_\_\_?

Tell me about your very first career choice.

- What was it? What did you do? What was the attraction/appeal to this job?
- How old were you when you started?
- How would you describe your overall experience there? (-/+)
- How long were you there? Was your intention/plan to stay there that long/less time/longer?
- What changed? (PROBE: milestones, life altering events)
- What was your reason for leaving?
- When you left there, did you have another job lined up/ a plan? Why/why not?
- Did you know what you wanted in your next job/what you wanted to do?

**IF MORE THAN TWO OR RETIRED NOW CONTINUE LINE OF QUESTIONING, OTHERWISE  
GO TO "CURRENT CAREER" SECTION**

Tell me about your second career choice.

- What was it? What did you do? What was the attraction/appeal to this job? Why this career??
  - Was this an easy transition? Why/why not?
  - Did you have to acquire new skills/degrees/certification/etc?
- What lead you to this new career?
- How was this career different from your previous career(s)? (PROBE: change in type of work, required me to go back to school, more/less responsibility, more/less pay, more flexibility, work in different sector or industry)
- Why would you consider this to be a career change?
- What would you say is the **main** reason you made this career change?
- How did you feel starting in a new arena? Did you have to start over/from the beginning?
- Did you have any concerns?
- How old were you when you started? How were you feeling making this move at this stage of your life? (PROBE: +/-, milestones, life altering events)
- What was important this time around? Why?
- How would you describe your overall experience in this position? (-/+)
- How long were you there? Was your intention/plan to stay there that long/less time/longer?
- What was your reason for leaving?
- When you left there, did you have another job lined up/a plan? Why/why not?
- Did you know what you wanted in your next job/what you wanted to do?

***AN ATTEMPT WILL BE MADE TO TRY AND COVER ALL CAREER CHANGES IF MORE THAN 2 AS TIME PERMITS, TO ENSURE WE GET TO CURRENT CAREER.***



## **CURRENT AND FINAL TO-DATE-CAREER (10 Minutes)**

Now, let's bring ourselves to present day and tell me about your current career.....

- What do you do? How long have you held this position?
- How was your start in this career? What was the appeal?
- How is this career different from your previous career? (PROBE: change in type of work, required me to go back to school, more/less responsibility, more/less pay, more flexibility, work in different sector or industry)
- Why would you consider this to be a career change?
- What would you say is the **main** reason you made this career change?
- How old were you when you started this job? How were you feeling making this move at this stage of your life? (PROBE: +/-, milestones, life altering events)
- What do you like/dislike about your current job?
- How would you describe your overall experience there thus far?
- Would you say this is your final career move? Do you anticipate another change in the future? Why/why not?

## **BARRIERS/OBSTACLES (5 Minutes)**

You've shared your experience in making career change(s) to get you to your present career choice. Was there ever a time when you wanted to change careers but for some reason you didn't/couldn't at that given time? .....

- When?
- What were the barriers/obstacles that prevented you from changing careers?
- Are there any barriers/obstacles that might prevent you from making another career change? [If yes, please explain].

## **SUMMARY AND THANK YOU**

Is there anything else you would like to add that might be helpful for our discussion today?

Again, I would like to thank you for your time and participation



## Re-career STUDY – IDIs

**DEAR RECRUITER:**

**FIRSTLY THANKS SO MUCH FOR HELPING US FIND GREAT PEOPLE FOR THIS STUDY! WE NOT ONLY WANT THEM TO BE ON SPEC BUT ALSO CHATTY, ELOQUENT AND HAPPY TO SHARE THEIR OPINIONS WITH OTHERS. YOUR ROLE IN GETTING US THE RIGHT PEOPLE IS REALLY IMPORTANT AND WE APPRECIATE YOUR EFFORTS!**

Name: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Best Phone: \_\_\_\_\_ Email: \_\_\_\_\_

INTERVIEWERS NAME \_\_\_\_\_



**1 hour Telephone IDIs Using the your national Database** These 20 interviews will be recruited to participate in interviews on the dates falling between 11/26-11/30. See excel sheet for times on the calendar.

IDIs 1-20 (20 Telephone Interviews) SCHEDULE SEE EXCEL SHEET FOR Moderator availability

IDI NUMBER \_\_\_\_\_ DATE \_\_\_\_\_ TIME OF CALL \_\_\_\_\_

If according to the schedule of the respondent, the respondent cannot do the interview at the time that Patricia has free, check with Phoenix as there may be some flexibility with the calendar. Please keep track.

### **Overview of the 20 In-Depth Telephone Interviews**

Phoenix will conduct, **20 In-Depth Interviews (IDIs)** among the focus group database.

### **RECRUITING SPECIFICATIONS TO INCLUDE:**

- Adults 35+
- Mix of adults ages 35+ in terms of age, gender, racial/ethnic diversity, and number of career changes.
- Must have made a career change in the past 10 years and now is continuing with that new path
- Median HH income range for the state where the respondent lives
- 10 Males and 10 females
- Mix of Urban, Suburban (if possible also recruit a few that live in the rural community)

- Mix of race/ethnicities
  - 10 Anglo
  - 4 Hispanic
  - 3 African American
  - 3 Asian
- IDIs separated by Age
  - Ages 35-54 (10)
    - 5 ages 35 to 44,
    - 5 ages 45 to 54
  - Ages 55-74 (10)
    - 5 ages 55 to 64, and
    - 5 ages 65 to 74.

| WEST– Total of 5 interviews     |        |       |       |       |       |               |
|---------------------------------|--------|-------|-------|-------|-------|---------------|
| IDIs                            | Gender | 35-44 | 45-54 | 55-64 | 65-74 | TOTAL<br>N=20 |
| White                           | Male   |       |       |       | 1     | 1             |
|                                 | Female | 1     |       |       |       | 1             |
| African American                | Male   | 1     |       |       |       | 1             |
|                                 | Female |       |       |       |       | 0             |
| Hispanic                        | Male   |       |       | 1     |       | 1             |
|                                 | Female |       |       |       |       | 0             |
| Asian                           | Male   |       |       |       |       | 0             |
|                                 | Female |       | 1     |       |       | 1             |
| MIDWEST – Total of 5 interviews |        |       |       |       |       |               |
| White                           | Male   | 1     |       |       |       | 1             |
|                                 | Female |       |       |       | 1     | 1             |
| African American                | Male   |       |       | 1     |       | 1             |
|                                 | Female |       |       |       |       | 0             |
| Hispanic                        | Male   |       |       |       |       | 0             |
|                                 | Female |       | 1     |       |       | 1             |
| Asian                           | Male   |       |       | 1     |       | 1             |
|                                 | Female |       |       |       |       | 0             |



### SOUTH – Total of 5 interviews

|                    |        |   |   |   |   |   |
|--------------------|--------|---|---|---|---|---|
| White 3            | Male   | 1 |   |   |   | 1 |
|                    | Female |   | 1 | 1 |   | 2 |
| African American 1 | Male   |   |   |   |   | 0 |
|                    | Female |   |   | 1 |   | 1 |
| Hispanic 1         | Male   |   |   |   |   | 0 |
|                    | Female |   |   |   | 1 | 1 |
| Asian 0            | Male   |   |   |   |   | 0 |
|                    | Female |   |   |   |   | 0 |

### NORTH EAST – Total of 5 interviews

|                    |        |   |   |  |   |   |
|--------------------|--------|---|---|--|---|---|
| White 3            | Male   |   | 1 |  | 1 | 2 |
|                    | Female |   |   |  | 1 | 1 |
| African American 1 | Male   |   |   |  |   | 0 |
|                    | Female | 1 |   |  |   | 1 |
| Hispanic 0         | Male   |   |   |  |   | 0 |
|                    | Female |   |   |  |   | 0 |
| Asian 1            | Male   |   | 1 |  |   | 1 |
|                    | Female |   |   |  |   | 0 |

|                      |  |                               |                               |                               |                               |                                 |
|----------------------|--|-------------------------------|-------------------------------|-------------------------------|-------------------------------|---------------------------------|
| Gender Totals        |  | Male 2<br>Female 2<br>Total 4 | Male 2<br>Female 4<br>Total 6 | Male 3<br>Female 2<br>Total 5 | Male 4<br>Female 1<br>Total 5 | Male 11<br>Female 9<br>Total 20 |
| White Race Totals    |  | 1                             | 4                             | 2                             | 2                             | 10                              |
| AA Race Totals       |  | 1                             |                               | 1                             | 1                             | 3                               |
| Hispanic Race Totals |  | 1                             | 1                             |                               | 1                             | 4                               |
| Asian Race Totals    |  | 1                             | 1                             | 1                             | 1                             | 3                               |

**INTERVIEWER:**  
ASK TO SPEAK TO THE HEAD OF HOUSEHOLD.

Hello my name is \_\_\_\_\_. I am calling from \_\_\_\_\_ an independent marketing research company. Please be assured that we are not selling anything, nor will your name appear on any lists. We are currently inviting people to participate in a one-on-one **phone interview** sometime between the dates of 11/26 and 11/30 for one hour of time. Should you qualify after answering some screening questions, would you be available and willing to participate?

- 1. Yes [ ] **CONTINUE**
- 2. No .....[ ] **TERMINATE**

**1a. GENDER (DO NOT ASK)**

Male [ ]  
Female [ ]

RECRUIT 10 Males  
and 10 females as per  
the grid on page 2



- 1b. What State do you live in?\_\_\_\_\_ RECRUITER TO CHECK THE CENSUS REGIONS AS PER PAGE 7/8  
GET 5 INTERVIEWS PER CENSUS REGION
- 1c. We are looking for a mix of people that live in different areas of the United States. Would you classify where you live as Urban, Suburban or Rural?
- Urban                                   [ ]  
Suburban                               [ ]  
Rural                                   [ ]
- RECRUITER: GET A GOOD MIX OF URBAN (n=8) SUBURBAN (n=7) AND IF POSSIBLE ALSO RURAL (n=5)
2. We are looking for people from particular backgrounds. Can you tell me which of the following best describes your race or ethnicity? **READ IN THIS ORDER.** \*In order to be counted toward the target of 10 Caucasians/Whites, a respondent must identify themselves as Caucasian/White AND must NOT say Asian, Hispanic, or African American.

**READ IN THIS ORDER.** \*In order to be counted toward the target of 10 Caucasians/Whites, a respondent must identify themselves as Caucasian/White AND must NOT say Asian, Hispanic, or African American

**African American/Black**

Asian

Hispanic

**Caucasian/White**

Other

Prefer not to answer

**CONTINUE (Looking for 3 respondents)**

**CONTINUE (Looking for 3 respondents)**

**CONTINUE (Looking for 4 respondents)**

**CONTINUE (Looking for 10 respondents\*)**

TERMINATE

TERMINATE

3. We would also like to speak with people of different ages. Would you please tell me your age? **(DO NOT READ LIST. RECORD**

**EXACT AGE)**

**RECRUIT TO GRID ON FIRST PAGE**

5 ages 35 to 44,

5 ages 45 to 54,

5 ages 55 to 64, and ] \_\_\_\_ (Baby B)

5 ages 65 to 74. \_\_\_\_ (Silent G)

**RECRUIT TO GRID ON FIRST PAGE**

5 ages 35 to 44,

5 ages 45 to 54,

5 ages 55 to 64, and

5 ages 65 to 74.

4. Any other age ..... [ ] **TERMINATE**

4a. Have you ever participated in a **research** discussion group, focus group or one-on-one interview for market research purposes?

Yes.....[ ] **CONTINUE TO Q.4b**

No.....[ ] **SKIP TO Q.5**

**RECORD ANSWER \_\_\_\_\_ IF WITHIN THE PAST 6 MONTHS (I.E. SINCE APRIL 2018)  
THANK AND TERMINATE. IF LONGER THAN 6 MONTHS CONTINUE TO Q.4c**

4b When was the last time you participated in research?

**RECORD ANSWER \_\_\_\_\_ IF WITHIN THE PAST 6 MONTHS (I.E.  
SINCE APRIL 2018) THANK AND TERMINATE. IF LONGER THAN 6 MONTHS CONTINUE  
TO Q. 4c**

4c What was the topic of the study?

**RECORD ANSWER \_\_\_\_\_ IF  
SUBJECT WAS RELATED TO CAREERS OR AARP  
THANK AND TERMINATE.**



5a. Do you, or does anyone in your household, or a close family member, work in...  
**(READ LIST)**

|  |     |                             |
|--|-----|-----------------------------|
| Market Research or Interviewing                    | [ ] | IF YES TO ANY,<br>TERMINATE |
| Public Relations, TV, Print, Radio or Social Media | [ ] |                             |

5b. What is your current occupation, or if retired, what was your former occupation?

---

**RECORD & REPORT**

|  |     |   |
|--|-----|---|
| Market Research or Interviewing                    | [ ] | IF OCCUPATIOON<br>IN ANY OF THESE<br>CATEGORIES,<br>TERMINATE |
| Public Relations, TV, Print, Radio or Social Media | [ ] |   |

6. Do you currently work for pay for at least 35 hours per week?

Yes [GO TO Q8]

No [GO TO Q7]

7. Have you ever worked for pay at least 35 hours per week?

Yes

No (TERMINATE)

8. How many **full-time** jobs have you held during your working life, not including summer employment or other seasonal employment? This includes working for yourself, as well as for someone else as an employee.

One Job - TERMINATE

Two Jobs or More CONTINUE and ask how many jobs [RECORD NUMBER FOR THE PROFILE SHEET \_\_\_\_\_]  
(TERMINATE IF NOT 2 OR MORE JOBS)

9. Since the age of 25, how many times would you say you have changed full time jobs?

No Job Changes - TERMINATE

One Job Change or more- CONTINUE and ask how many jobs [RECORD NUMBER \_\_\_\_]

10. Since the age of 25, how many times would you say you have changed careers?

No Career Changes - TERMINATE

One Career Change or more- CONTINUE and ask how many careers [RECORD NUMBER \_\_\_\_]

11. What would you say is the main reason you made this career change? Select only one answer.  
[OPEN-ENDED LIST BELOW]

|   |  |
|---|--|
|   |  |
| For more money                                |  |
| For more flexible work or shifts              |  |
| For more secure work                          |  |
| For more meaningful work                      |  |
| New career is always something I wanted to do |  |
| For better benefits                           |  |
| For less responsibility                       |  |
| To follow my passion                          |  |
| Due to a life altering experience             |  |
| Entering a different stage of my life         |  |
| Other _____ (Specify)                         |  |

RECRUITER GET A GOOD MIX OF REASON WHY CHANGES WERE MADE

12. Which of the following best describes the highest level of education you have completed?

- Completed grade school \_\_\_\_\_ [ ]
- Some high school \_\_\_\_\_ [ ]
- Completed high school \_\_\_\_\_ [ ]
- Graduated from college, university, or technical school \_\_\_\_\_ [ ]
- Received a postgraduate degree \_\_\_\_\_ [ ]

13. What was your household's total income in 2017 before taxes?  
(**READ RELEVANT LIST**)

RECRUITER SEE LIST ON PAGE 7-8 OF MEDIAN INCOMES. TO CONTINUE INCOME MUST BE PLUS OR MINUS \$20,000 OF THE STATED FIGURE FOR THE STATE THEY LIVE IN



14. I'm going to read a few statements, and after I read each one, I'd like you to tell me whether it describes you very well, somewhat well, or not at all. **(READ EACH STATEMENT. CHECK ONE ANSWER FOR EACH STATEMENT BELOW.)**

|  | <b>Very<br/>Well</b> | <b>Somew<br/>hat<br/>Well</b> | <b>Not At<br/>All</b> |
|--|----------------------|-------------------------------|-----------------------|
| I enjoy exchanging ideas with people on a variety of subjects      | ( )                  | ( )                           | ( )                   |
| I am friendly and outgoing   | ( )                  | ( )                           | ( )                   |
| If I am asked to describe something, I can usually do so in detail | ( )                  | ( )                           | ( )                   |
| I can quickly find words to describe my reactions                  | ( )                  | ( )                           | ( )                   |
| I generally have an opinion or point of view on topics or issues   | ( )                  | ( )                           | ( )                   |
| I am considered a creative thinker by those who know me            | ( )                  | ( )                           | ( )                   |

**MUST SAY “SOMEWHAT WELL” TO “VERY WELL” TO AT LEAST 5 STATEMENTS**

15. Please tell me about your ideal vacation. Where would you go? Who would you go with?  
What would you do there?

**RECORD ANSWER. IF LESS THAN 4 SENTENCES,  
TERMINATE.**

**IF NOT ABLE TO EASILY TELL A STORY OR CLEARLY  
EXPRESS AN IDEA,  
THANK AND TERMINATE.**

## INVITATION - IDI NUMBERS – 1-20

We are inviting some individuals to participate in a discussion via the telephone from November 26-30th. Each call will be just between the interviewer and yourself and the call can be made at a time convenient for you. The discussion will last one hour and will be on a conference line that you will need to call into at the specified time with a passcode. You will receive \$\_\_\_\_\_ for your participation and sharing your viewpoints. You will be mailed the check or gift card as your incentive after you complete the call. At no time will we attempt to sell you anything as part of your research participation.

Are you interested in participating in the telephone discussion?

Yes                                    ☐ **CONTINUE**  
No                                      ☐ **TERMINATE**

**SEE SCHEDULES – ON EXCEL SHEET –SCHEDULE WITH 1/2 HOUR IN BETWEEN  
FILL IN TIME IN BOX ON PAGE 1**

**(CONTINUE AFTER SCHEDULED COMPLETED FOR DATE AND TIME)**

Thank you! I'll need your name, address and phone number to send you a confirmation of your appointment and to remind you a day or so prior. **FILL IN THE INFORMATION IN THE BOX ON THE FIRST PAGE.**

**Confirmations:**

Please remind respondents of the following:

- **SCHEDULED TIME TO CALL IN**
- **YOU WILL DIAL INTO THIS NUMBER 800-504-8071  
AT THE SCHEDULED TIME. THE PASSCODE IS: 6217582**
- **YOU WILL BE EMAILED THIS INFORMATION AS WELL.**
- **MUST BE IN A QUIET PLACE IN WHICH THEY CAN HEAR THE MODERATOR WITH NO DISTRACTIONS FOR  
AN HOUR**

Source: U.S. Census Bureau, 2012-2016 American Community  
Survey 5-Year Estimates



Name

(All U.S. States)

West

Median HH Income  
per state

|            |        |
|------------|--------|
| Alaska     | 74,444 |
| Arizona    | 51,340 |
| California | 63,783 |
| Colorado   | 62,520 |
| Hawaii     | 71,977 |
| Idaho      | 49,174 |
| Montana    | 48,380 |
| Nevada     | 53,094 |
| New Mexico | 45,674 |
| Oregon     | 53,270 |
| Utah       | 62,518 |
| Washington | 62,848 |
| Wyoming    | 59,143 |

## Midwest

|                     |        |
|---------------------|--------|
| <b>Illinois</b>     | 59,196 |
| <b>Indiana</b>      | 50,433 |
| <b>Iowa</b>         | 54,570 |
| <b>Kansas</b>       | 53,571 |
| <b>Michigan</b>     | 50,803 |
| <b>Minnesota</b>    | 63,217 |
| <b>Missouri</b>     | 49,593 |
| <b>Nebraska</b>     | 54,384 |
| <b>North Dakota</b> | 59,114 |
| <b>Ohio</b>         | 50,674 |
| <b>South Dakota</b> | 52,078 |
| <b>Wisconsin</b>    | 54,610 |

## South

|                             |        |
|-----------------------------|--------|
| <b>Alabama</b>              | 44,758 |
| <b>Arkansas</b>             | 42,336 |
| <b>Delaware</b>             | 61,017 |
| <b>District of Columbia</b> | 72,935 |
| <b>Florida</b>              | 48,900 |
| <b>Georgia</b>              | 51,037 |
| <b>Kentucky</b>             | 44,811 |
| <b>Louisiana</b>            | 45,652 |
| <b>Maryland</b>             | 76,067 |
| <b>Mississippi</b>          | 40,528 |
| <b>North Carolina</b>       | 48,256 |
| <b>Oklahoma</b>             | 48,038 |
| <b>South Carolina</b>       | 46,898 |
| <b>Tennessee</b>            | 46,574 |
| <b>Texas</b>                | 54,727 |
| <b>Virginia</b>             | 66,149 |
| <b>West Virginia</b>        | 42,644 |

North  
East

|                      |        |
|----------------------|--------|
| <b>Connecticut</b>   | 71,755 |
| <b>Maine</b>         | 50,826 |
| <b>Massachusetts</b> | 70,954 |
| <b>New Hampshire</b> | 68,485 |
| <b>New Jersey</b>    | 73,702 |
| <b>New York</b>      | 60,741 |
| <b>Pennsylvania</b>  | 54,895 |
| <b>Rhode Island</b>  | 58,387 |
| <b>Vermont</b>       | 56,104 |





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**This research was designed and executed by Phoenix Marketing International.**  
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