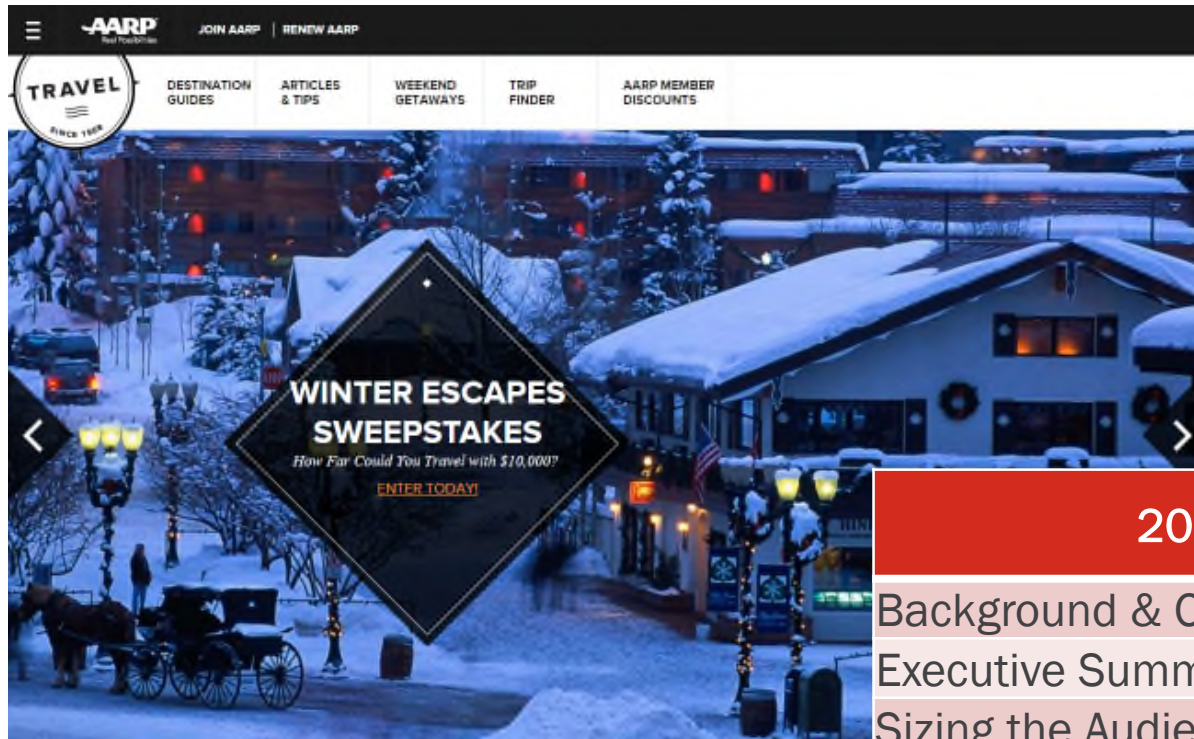


Travel Research: 2015 Boomer Travel Trends

November 2014

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2015 Travel Trends

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Background

- AARP Travel now has an opportunity to lead the field of travel for persons age 50 or older and their families by conducting a stream of research that will result in buzz-worthy information that shines a light on key trends and unexpected news for this demographic.
- The goal of this research is to provide broadcastable, PRable, and Samantha Brown topical data/information that will drive AARP Travel traffic.
- This specific study uncovers Travel Trends for 2015.

Objectives

- To identify the percent of the 50+ who plan on traveling in 2015
- To categorize the type of travel anticipated
- To track various aspects of upcoming travel; season, destination, transportation, what they pack, etc.
- To identify the various technology travelers anticipate using to aid in their travel plans
- To identify the differences in the travel behaviors by age and presence of children

Executive Summary

Travel in 2015

- Baby Boomers will be active travelers in 2015, as they anticipate taking an average of 4 – 5 trips next year.
 - Leading-edge Generation Xers, those age 45-49, also plan to take 4 – 5 trips next year.
- More than half (55%) of Boomers will travel only within the U.S.; four in ten (42%) plan to travel both domestically and internationally; and few (3%) expect to travel abroad only.
- The top motivators for personal travel are:
 - 57% To get away from normal, everyday life
 - 55% To spend time with family and friends
 - 54% To relax and rejuvenate
- Baby Boomers are primarily looking for a laid back and relaxing trip. To ensure they have what they need while away, they are most likely to pack their prescription medication, a comfortable pair of shoes, a camera and sunglasses.

Executive Summary

Trip Details

- Among the 50+ traveling internationally, they are most likely to categorize that trip as a Bucket List, Summer Vacation, or Multi-generational trip.
 - The most anticipated international destinations are Europe and Tropical locations
- Popular domestic trip types include Multi-generational, Summer Vacations, and Weekend Getaways.
 - Various U.S. cities are anticipated, along with one in ten mentioning a popular entertainment location (e.g. New York City, Las Vegas, Disney).
- Boomers and Leading-edge Gen Xers alike are not fans of traveling in the Winter. The majority of 2015 travel is set for Spring, Summer, or Fall.
- At this point (October 2014), most trips are in the planning stages or just an idea. Those taking an international trip are more likely to have booked their trip already than those traveling domestically (19% vs. 12%, respectively).
- Time spent planning trips does not appear to be exhaustive nor a deterrent to future travel, as most report the time invested was expected.

Executive Summary

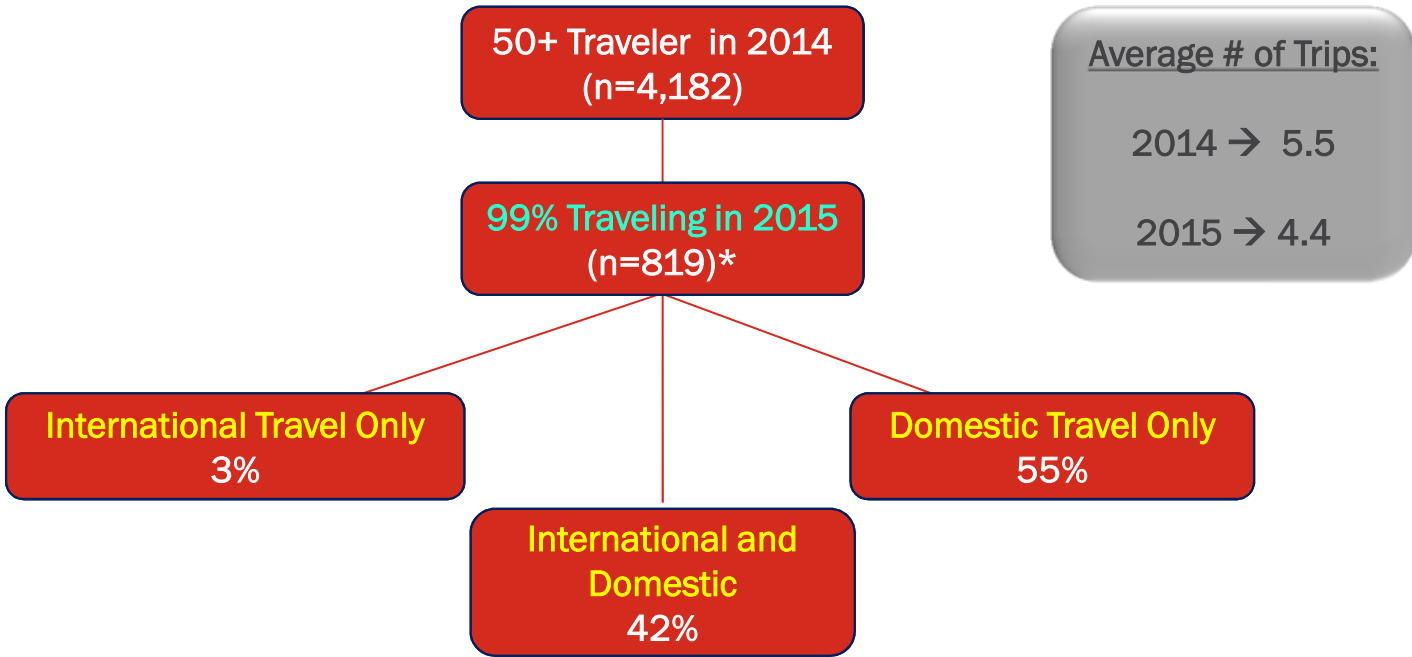
Travel Barriers: Work and Other

- Of the employed respondents, 91% will have paid vacation time in 2015.
 - Surprisingly, only half claim they will use all or most of this vacation time for personal travel in 2015.
 - When they do travel, one-third anticipate bringing some work with them, which might be expected as almost half feel it is at least somewhat important to stay connected to work while away on personal travel.
- And while the geo-political landscape and public health crises around the world have raised travelers' concerns, they are not deterring many travelers (18%) from their original 2015 travel plans. Cost, on the other hand, does impact 2015 travel.

SIZING THE AUDIENCE

2015 Travel Audience

- Among the 50+ travel audience, approximately 99% anticipate taking at least one trip for personal/leisure purposes in 2015 (January – December 2015).



S11: And finally, how many personal trips do you anticipate taking next year, in the calendar year of 2015? Base: Screener, Baby Boomers (50+) Travelers (n=4,182)
Q1a: How many of these trips will be international and how many will be domestic? Base: 2015 Baby Boomer Travelers (n=819)
S9/S10: Calculates Total Trips Taken in 2014 Base: 2015 Baby Boomer Travelers (n=819) * Qualified for survey quotas

Audience Profiles

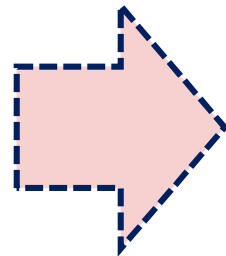
- Among AARP's target audience of those 50+ who have taken a leisure trip in the past two years, those who plan to take a trip abroad, domestically, or both do not look distinctly different than one another on the primary demographics.
- That said, the AARP member is more likely to travel both domestically and abroad than are non-members.
- And although those who anticipate traveling international only is a base too small to analyze quantitatively, there is some indication that this audience may skew single, females of various ethnic backgrounds.

Note: World Traveler are those who are planning to travel domestically and internationally

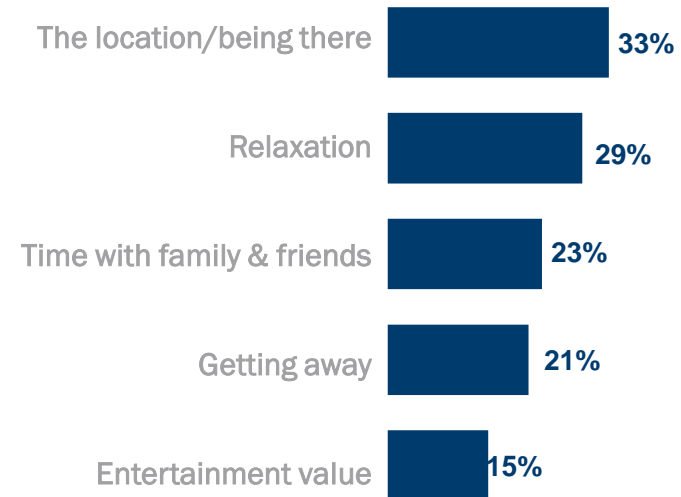
2015 Traveler Audience Profiles			
	International Traveler	Domestic Traveler	World Traveler
Base:	26	448	345
AARP Membership	(a)	(b)	(c)
Member	40%	52%	60% ^b
Non-Member	60%	48% ^c	40%
Gender			
Male	26%	48%	48%
Female	74%	52%	52%
Age			
45 - 49	-	-	-
50 - 59	61%	44% ^c	32%
60 - 69	19%	34%	41%
70+	20%	22%	27%
Ethnicity			
Caucasian/Other	52%	80%	74%
Black	4%	10%	11%
Hispanic	19%	8%	10%
Asian	25%	2%	6% ^b
Income			
Average	\$91k	\$82k	\$102k
Marital Status			
Single/Never Married	11%	6%	7%
Married/Living Together	54%	75%	79%
Divorced/Seperated	31%	12%	9%
Widow	4%	7%	5%

The Best Part of Personal Travel

- There are many reasons for using personal time for travel, but the excitement of the location - somewhere you've always wanted to go, going somewhere warm, seeing and doing new things - is mentioned most often as the best part of personal travel.
- The pleasure of relaxing and spending time with family and friends are also big drivers for personal travel.
- When presented with an aided list, the top three motivators for personal travel are:



Best Part of Personal Travel



57% *To get away from normal, everyday life*

55% *To spend time with family and friends*

54% *To relax and rejuvenate*

Base: 2015 Baby Boomer Travelers (n=819)

Q6: Now that we have you thinking about your travel plans for 2015, what is the best part thing about personal travel, for you?

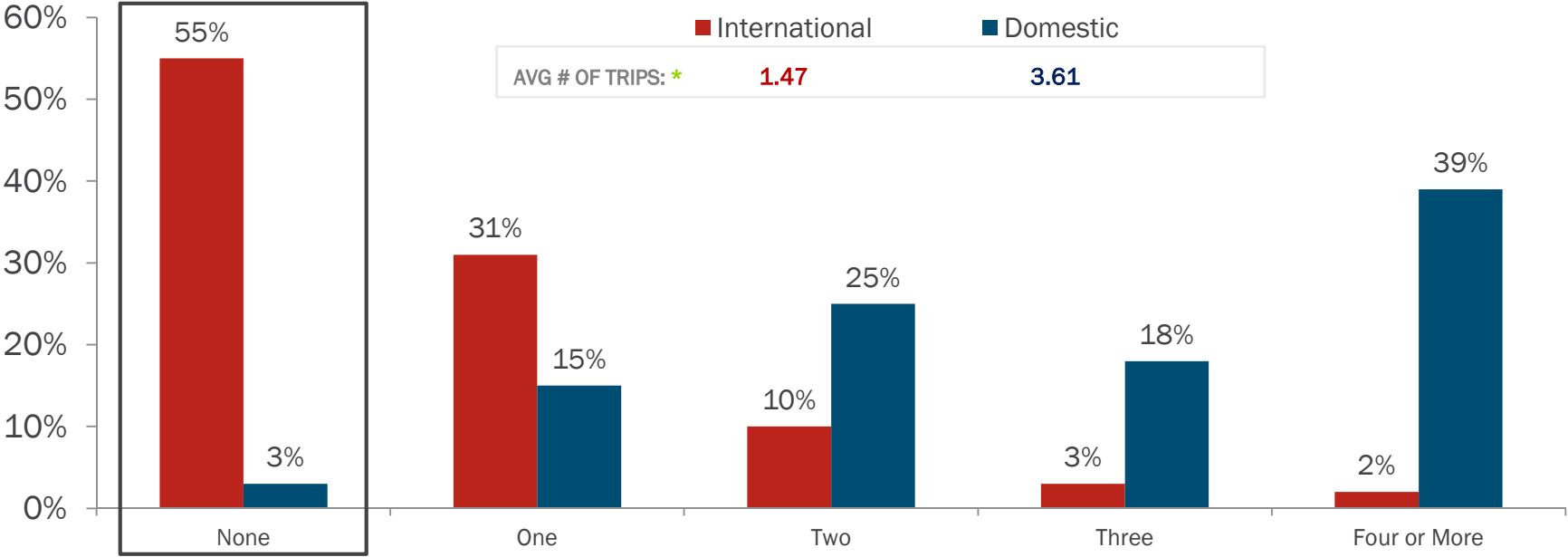
Q26: Now, thinking one more time about your personal trips you anticipate taking in 2015, from the list below, please select your **top three motivators** for taking these trips?

KEY FINDINGS

Number of Trips Anticipated

- Most (97%) respondents anticipate taking at least one domestic trip next year. Just less than half (45%) are looking forward to a trip abroad.
 - Hispanics are most likely to travel internationally compared to other ethnic populations.
 - There is a small pocket of heavy domestic travelers (14% anticipate taking 7 or more trips in 2015); they are primarily between the ages of 60 and 69.

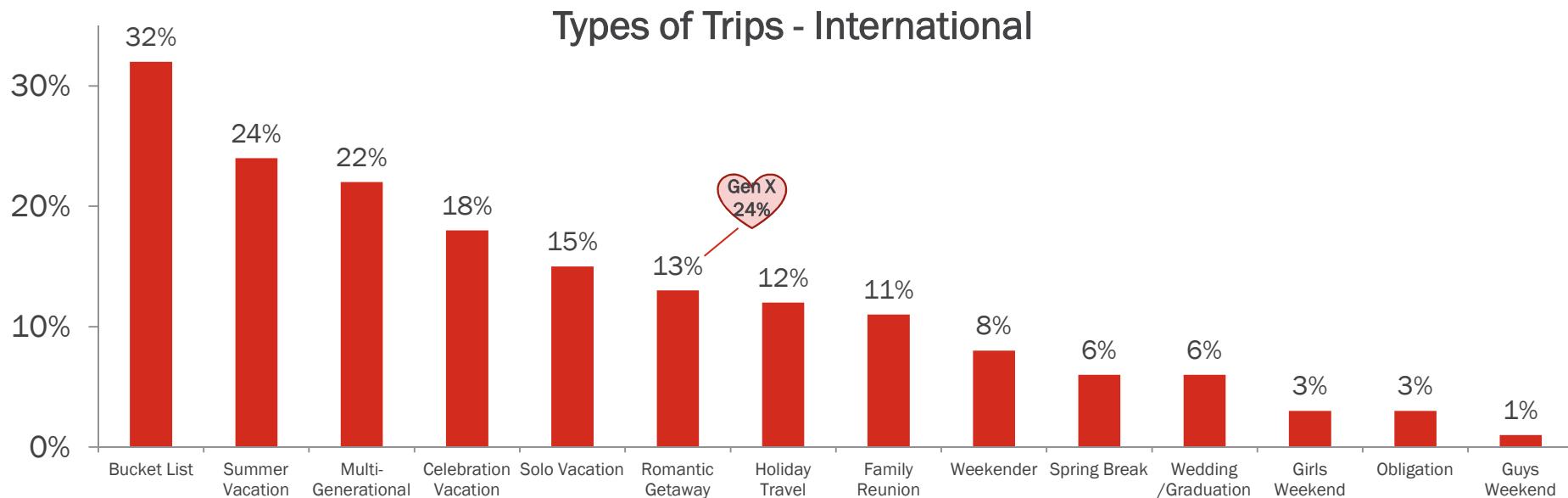
Number of Trips Anticipated By Destination



Q1a: A moment ago you mentioned you anticipate taking [number] personal trips in 2015. How many of these will be an international trip and how many will be a domestic trip?
Base: 2015 Baby Boomer Travelers (n=819) * Among those taking one or more trips

Types of International Trips Anticipated

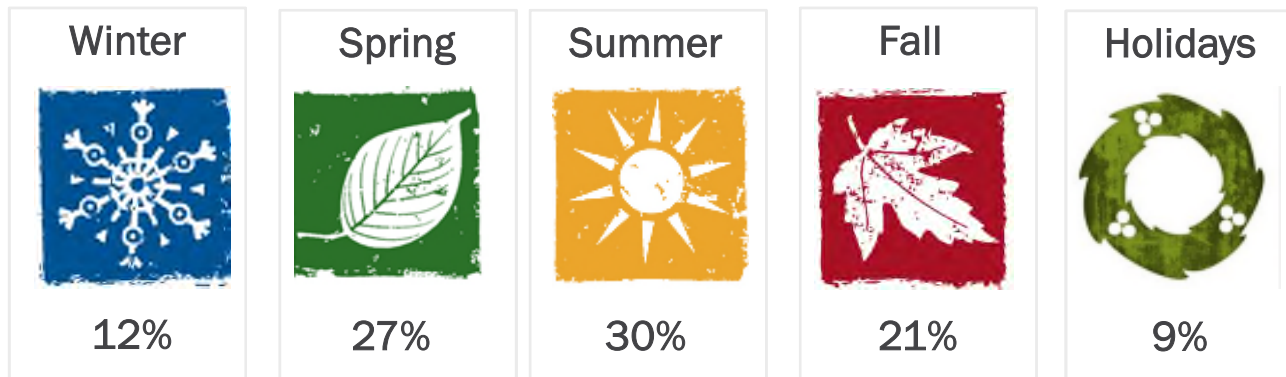
- When thinking about traveling internationally in 2015, Bucket Lists, Summer Vacations, and Multi-generational trips top the list.
 - Bucket List trips are most popular among respondents age 70+.
 - Leading-edge Gen Xers are more likely than Baby Boomers to travel internationally for a Romantic Getaway (24% vs. 13%, respectively).



Q2: For the [Q1a_INTERNATIONAL] international trips you plan on taking next year, please read the list of trip types below and select your **primary motivation** for EACH trip.
Base: Baby Boomers Planning on 1 or More International Trips in 2015 (n=371)

Time of International Travel

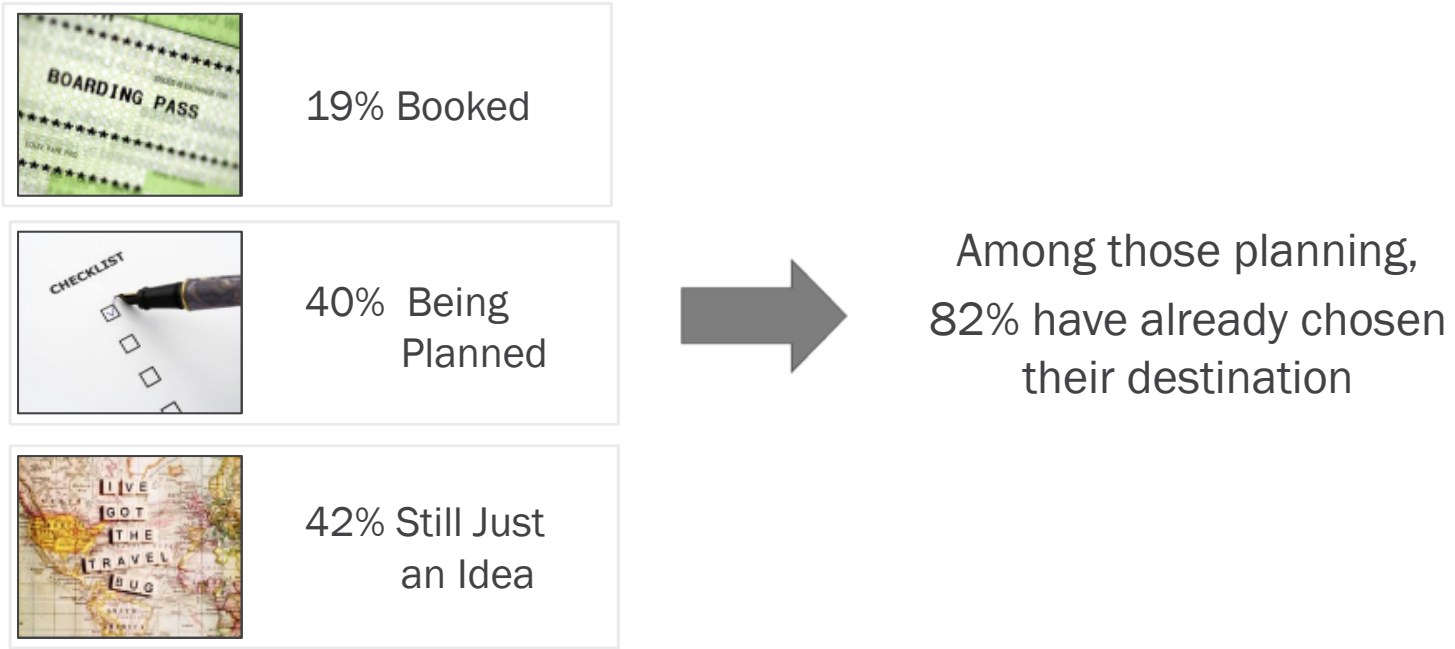
- Overall, Summer and Spring are the most popular seasons for International travel.
- There are some seasonal preferences seen by type of trip:
 - Wedding/Graduations, Family Reunions, and Family Trips all gravitate toward the summer months.
 - Fall feels right for Weekend Getaways.
 - International Romantic Getaways are most likely planned for Spring or Fall.
 - Bucket List and Celebration Vacation travelers appear to be open to Spring, Summer, or Fall.



Q2b: Thinking about your international trips listed below, please indicate the time of year, or season you plan to travel.
Base: Baby Boomers Planning on 1 or More International Trips in 2015 (n=371)

Commitment to International Travel

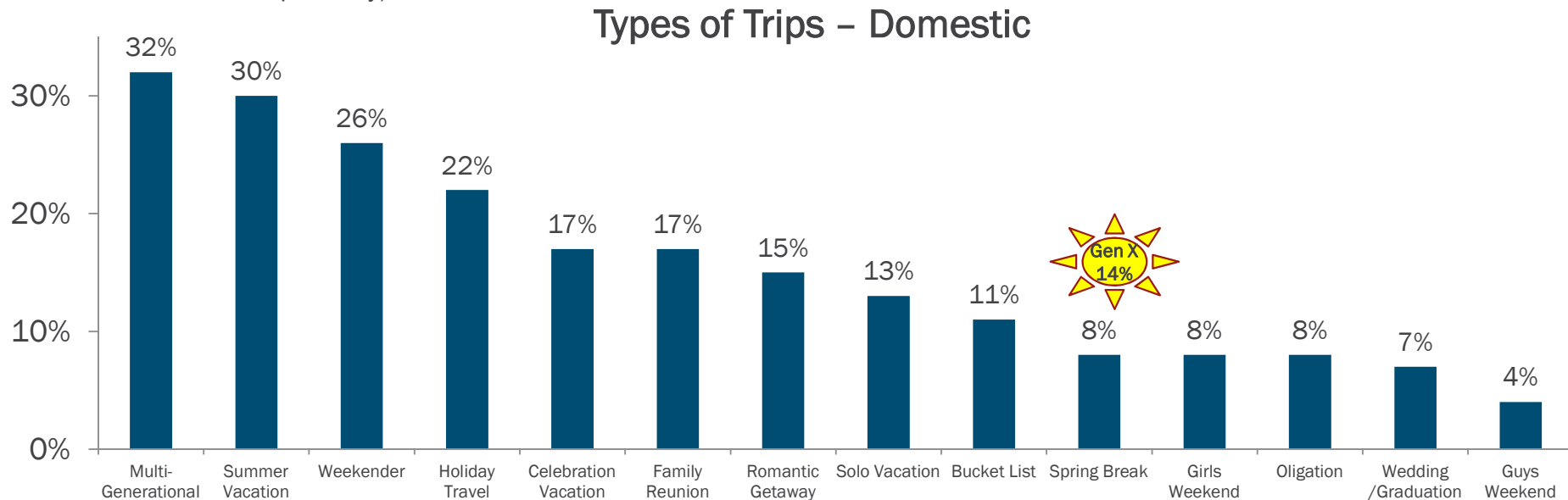
- Less than one in five international trips for 2015 are already booked as of October 2014, with Bucket List and Wedding/Graduation trips being the most likely.
- The trips that are most likely to still be in the ideation stage are Weekend Getaways, Solo Vacations, and also Bucket List travels.



Q3a: For the international trips you anticipate taking next year, please indicate if it is booked, being planned, or just an idea.
Q3b: For those international trips that are still in the planning phase, have you selected a final destination?
Base: Baby Boomers Planning on 1 or More International Trips in 2015 (n=371)

Types of Domestic Trips Anticipated

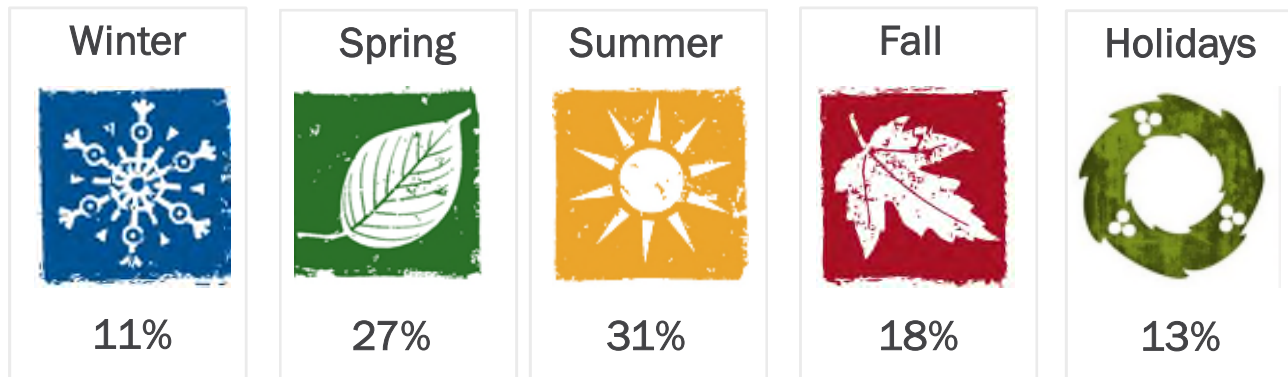
- Similar to International travel plans, a Multi-generational trip and a Summer Vacation are among the top domestic trips anticipated in 2015. But unlike international, Bucket List trips are way down the list, with a Weekend Getaway rounding out the top three domestic trips anticipated.
 - A domestic Romantic Getaway is anticipated more so by those who are married, whereas those who are not married are significantly more likely to be thinking about or planning a Solo Vacation.
 - Leading-edge Gen Xers, with 47% who still have kids in the household, are more likely than Baby Boomers to be planning a Spring Break trip in 2015 (14% vs. 8%, respectively), but less likely to be planning a Bucket List trip (6% vs. 11%, respectively).



Q4: For the [Q1a_DOMESTIC] domestic trips you plan on taking next year, please read the list of trip types below and select your **primary motivation** for EACH trip.
Base: Baby Boomers Planning on 1 or More Domestic Trips in 2015 (n=793)

Time of Domestic Travel

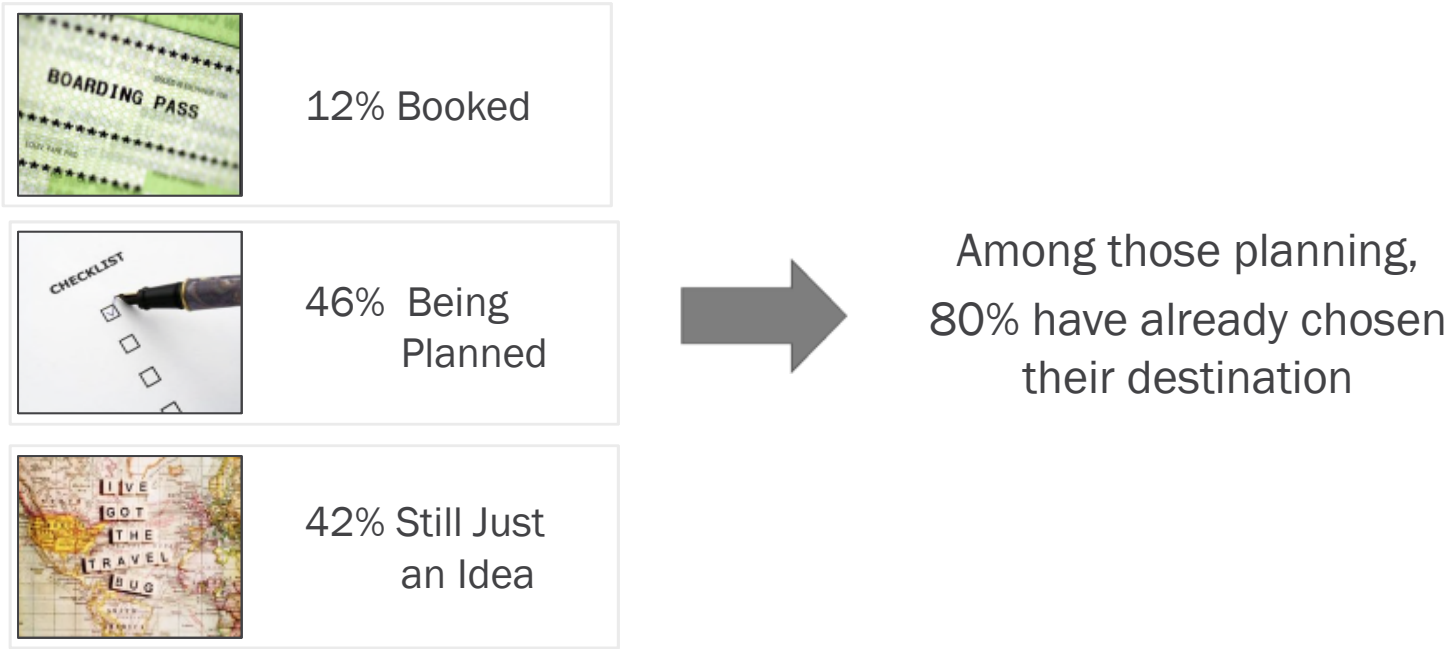
- As seen with international travel, the colder months are less popular for travel, with the exception of holiday travel.
- There are some seasonal preferences seen by type of domestic trip:
 - Weddings/Graduations and Family Reunions are a heavily focused for Summer.
 - Romantic Getaways, Solo Vacations, and Celebration Vacations are anticipated for Spring, while Bucket List travelers tend to gravitate toward the Fall.
 - Domestic Girls Trips and Weekend Getaways are likely to take place in the Spring or Fall.



Q4b: Thinking about your domestic trips listed below, please indicate the time of year, or season you plan to travel.
Base: Total Planning on 1 or More Domestic Trips in 2015 (n=793)

Commitment to Domestic Travel

- As of October 2014, few have their domestic travel plans locked-in compared to international travel.
- That said, similar to those who anticipate traveling internationally, the majority of domestic travelers are still in a state of planning or dreaming about their trip.



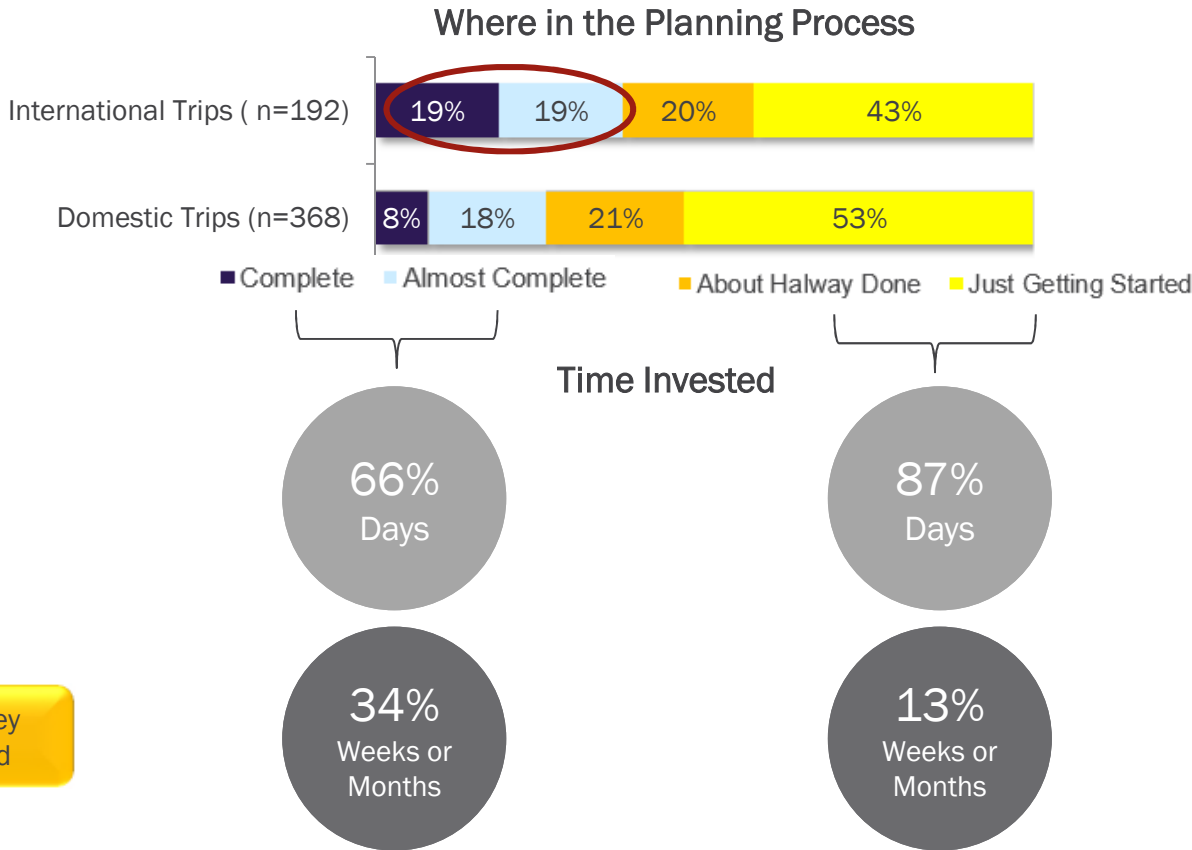
Q5a: For the domestic trips you anticipate taking next year, please indicate if it is booked, being planned, or just an idea.
Q5b: For those domestic trips that are still in the planning phase, have you selected a final destination?
Base: Total Planning on 1 or More Domestic Trips in 2015 (n=793)

Degree of Planning

- Among those with a destination in mind, approximately one-fourth have, or almost have, completed their arrangements; this is more likely the case among those traveling internationally (38%) than domestic (26%). Although not significant, Leading-edge Gen X travelers are somewhat slower in securing their 2015 travel plans – 21% have at least almost completed their booking.

- Time spent planning varies, with most travelers likely to invest at least a few days arranging their trip.
- However, those traveling internationally invest significantly more time: 49% spent weeks/months planning vs. 21% of domestic travelers at the same stage of planning.

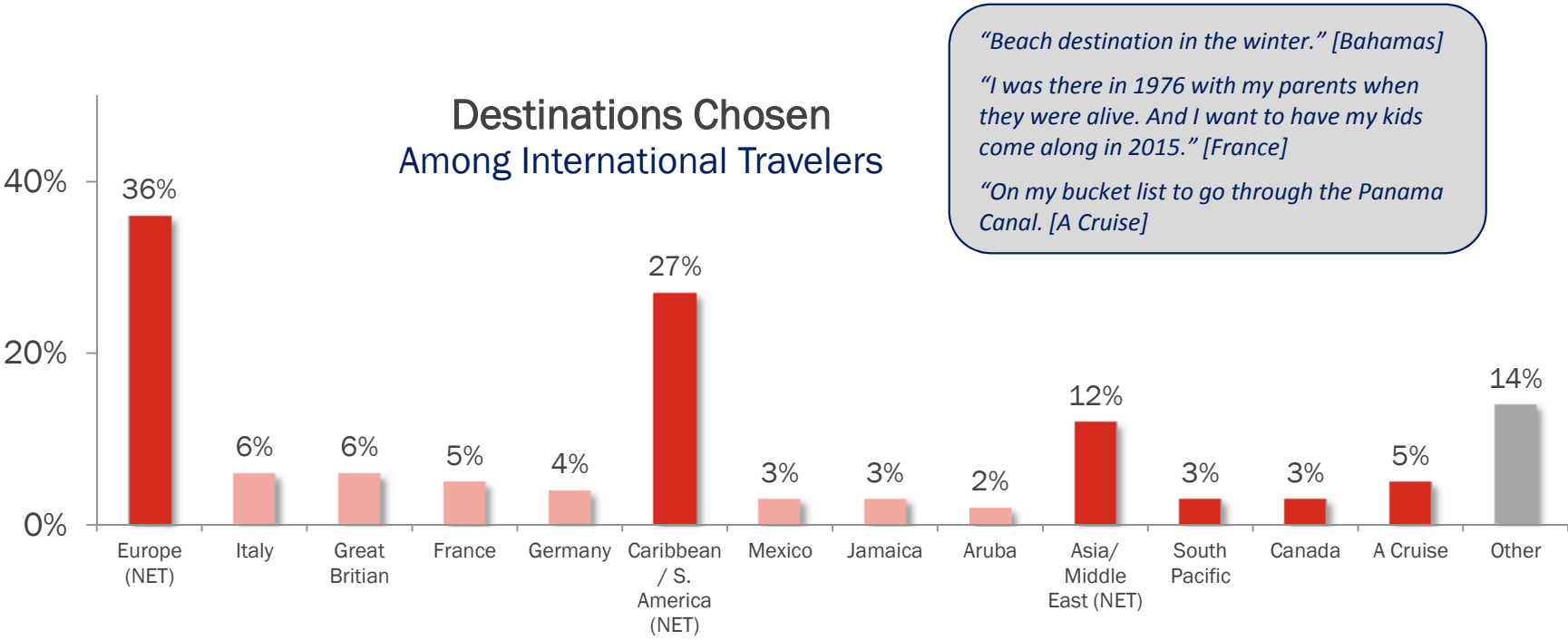
Most (74%) said the amount of time they invested was about what they expected



Q12: How far along are you in the planning process of this next trip? Base: Baby Boomers Evaluating a Trip (n=560)
 Q12a_1: Approximately, how much time have you invested in planning this trip, thus far? Base: Complete/Almost (n=168); Halfway/Getting Started (n=392)
 Q12b: Which best describes how long it took to plan? Base: Trip is Completely Planned (n=67)

Selected Destinations – International Travelers

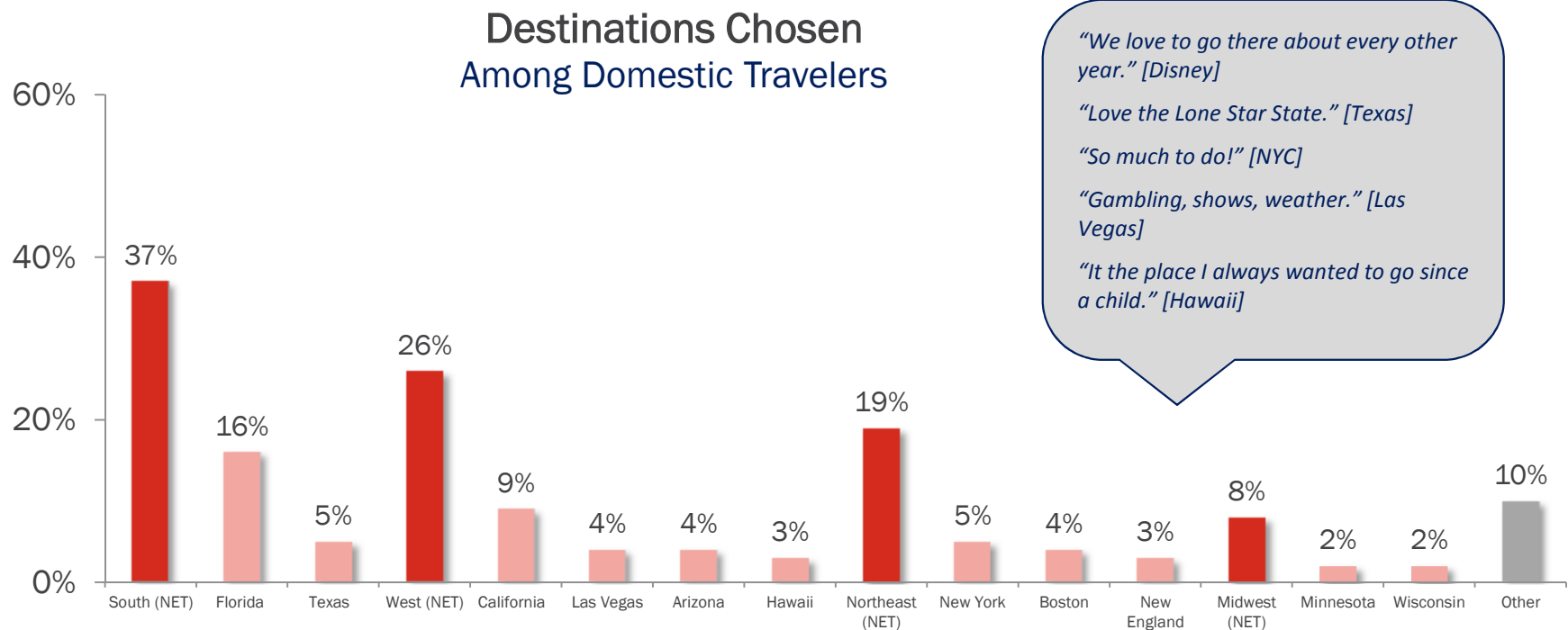
- Among those looking to travel abroad in 2015, Europe is the most cited destination .
- Tropical settings are also popular among international travelers, with 27% indicating they plan to travel to a "hot" spot.



Q9a: What is the primary destination for this trip? Base: Baby Boomers Evaluating an International Trip (n=211 Coded)

Selected Destinations - Domestic

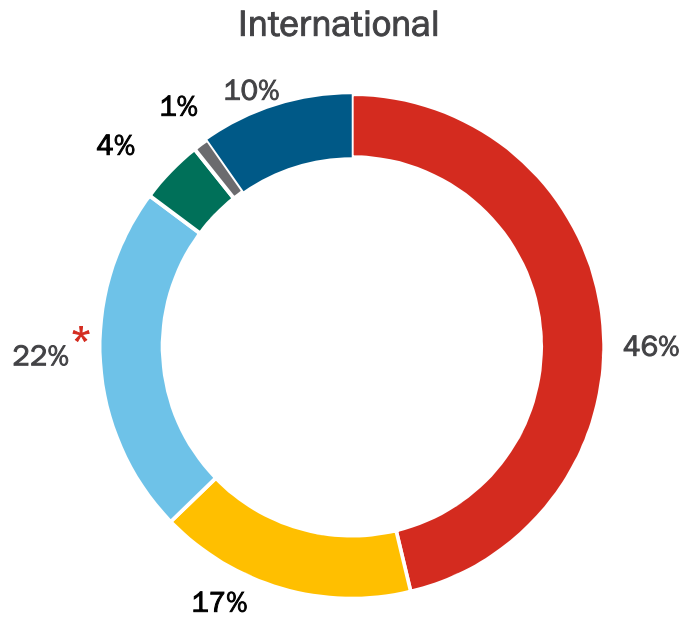
- Of the myriad of U.S. destinations that are on travelers' lists for 2015, Florida, California, and New York rise to the top.



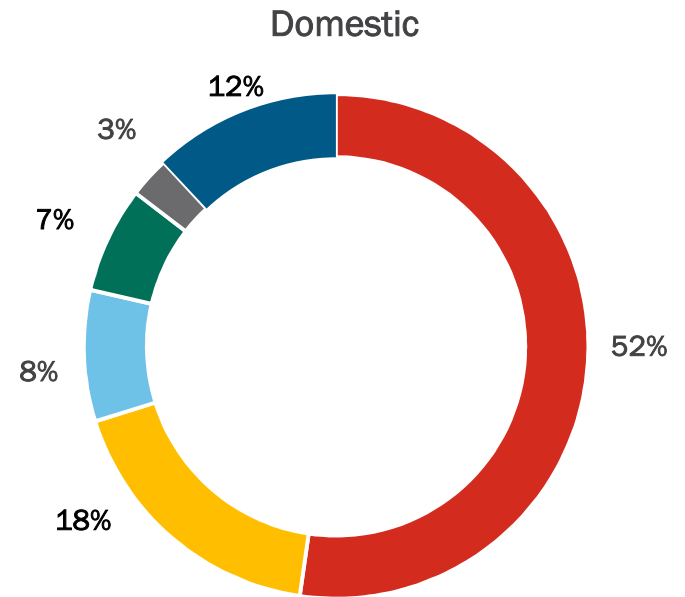
Q9a: What is the primary destination for this trip?

Base: Baby Boomers Evaluating a Domestic Trip (n=329 Coded)

Type of Destination Location



Base: Baby Boomers Evaluating an International Trip (n=192)



Base: Baby Boomers Evaluating a Domestic Trip (n=368)

- City/Town
- Beach
- On the water*
- Mountains
- Parks/Campgrounds
- Other

*On the water includes, Cruise, Lakes, Rivers

- A city/town is by far the most popular destination among all, however, international travelers are more likely to take a cruise than are domestic travelers
 - Beaches are popular among domestic Yearly Trip takers (i.e. summer/spring/holiday)
 - There are no variances in destination locations among Leading-edge GenX domestic travelers, however, internationally, they are more likely than Baby Boomer to visit a city (60%) versus take a cruise (9%).

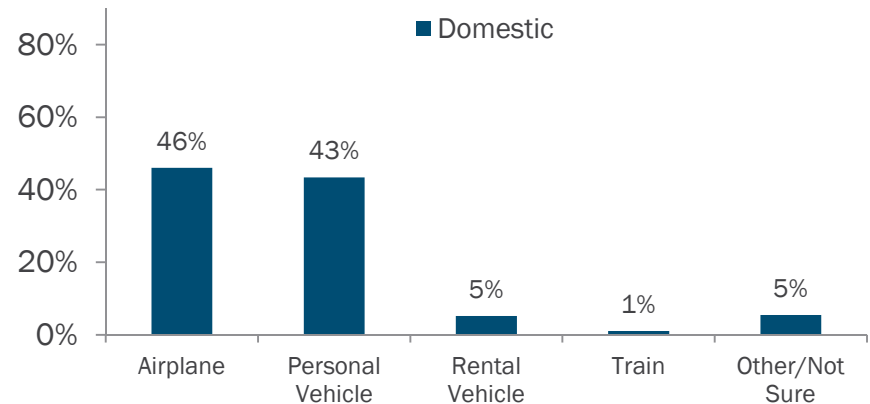
Q10a: Which of the following best describes the type of location you have chosen for this trip?

* Denotes a significant difference between travel segments

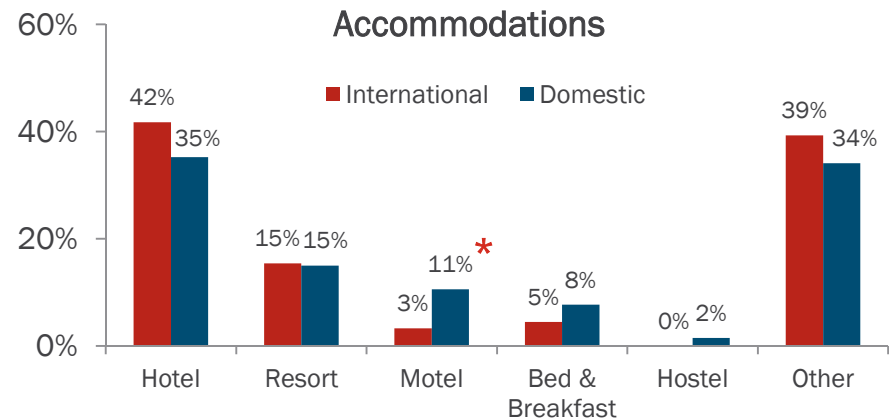
Transportation & Accommodations

- Flying, not surprisingly, is the most cited mode of transportation for traveling abroad. But, when it comes to domestic travel, respondents anticipate driving to their final destination just as much as they do flying .
- Once at their final destination, hotels are the most frequently mentioned accommodation, regardless if traveling domestically or aboard.
 - Leading-edge GenX domestic travelers are more likely to stay at a resort (24%) than are those 50+.

Primary Mode of Transportation



Accommodations

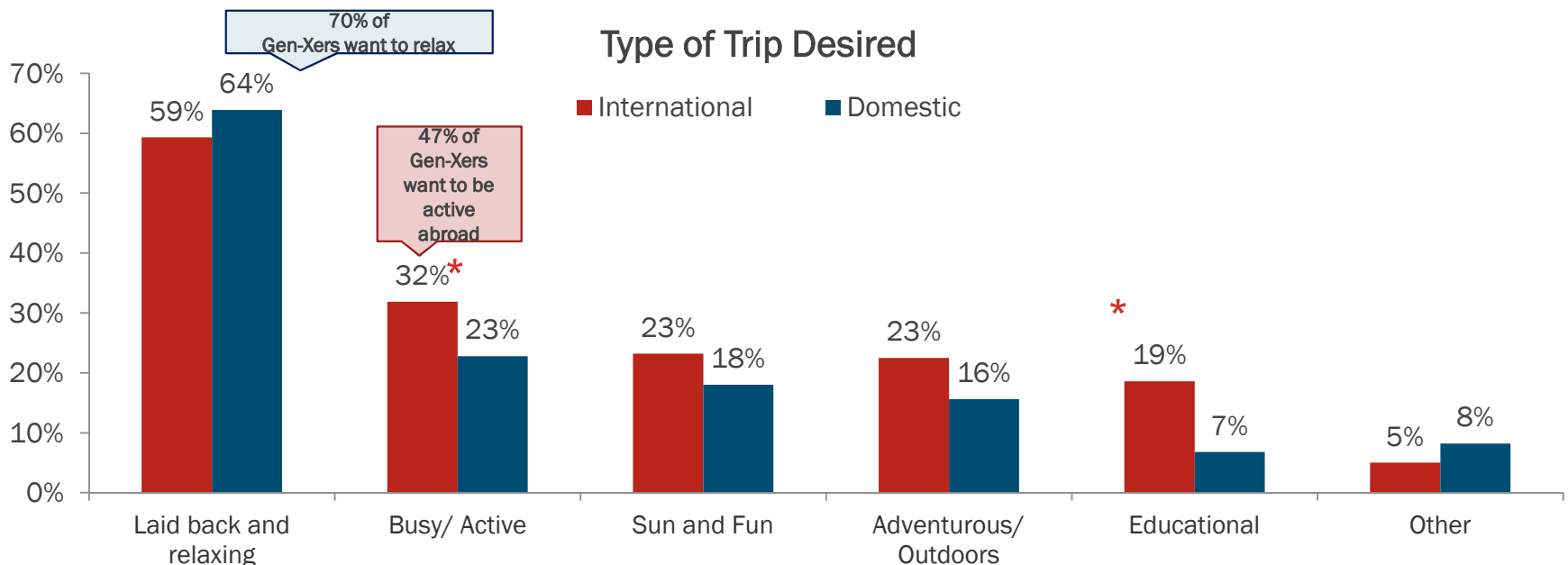


Base: Baby Boomers Evaluating an Trip (International: n=192; Domestic: n=368)
 Q10b: What is the primary mode of transportation you will use to get to your destination?
 Q10c: Which of the following best describes the type of accommodations you will be staying at on this trip?

* Denotes a significant difference between travel segments

Type of Trip Desired

- Most travelers are looking for laid back and relaxing trip in 2015.
- Bucket List travelers are slightly more likely than others to associate their trip with adventurous, if domestic. If they are taking their Bucket List trip overseas, they are more likely to categorize it as educational.
- Celebration Vacationers also expect to be busy and active, more so than those traveling for other reasons.



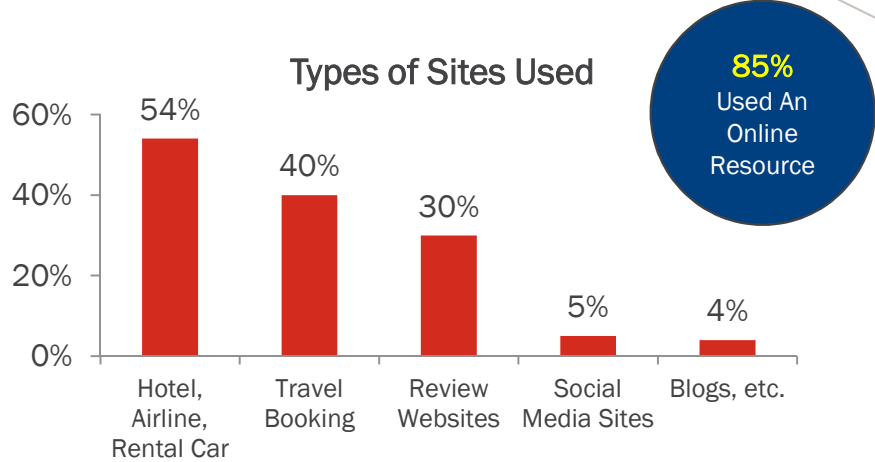
Base: Baby Boomers Evaluating an Trip (International: n=192; Domestic: n=368)

Q10d Now, thinking about your activities on this trip, which of the following best describes the type of kind of trip you want it to be?

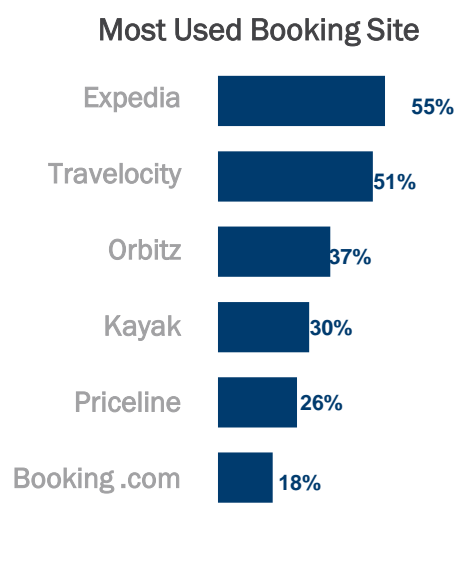
* Denotes a significant difference between travel segments

Planning the Trip

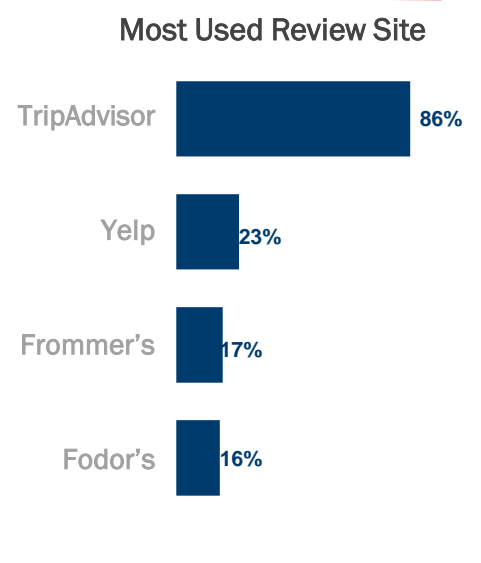
- Nearly all respondents in the planning phases of a trip for 2015 have used an online resource to help them make their decisions and/or arrangements.
- Going directly to the airline or hotel website is a popular choice, as is the use of a travel booking site.
- Popular travel sites used:
 - Expedia
 - Travelocity
- The most popular review site, by far, is TripAdvisor.
- All resource behaviors are similar between Baby Boomers and Leading-edge Gen X



Base: Baby Boomers Evaluating a Trip (n=560)



Base: Baby Boomers Using a Booking Site (n=225)



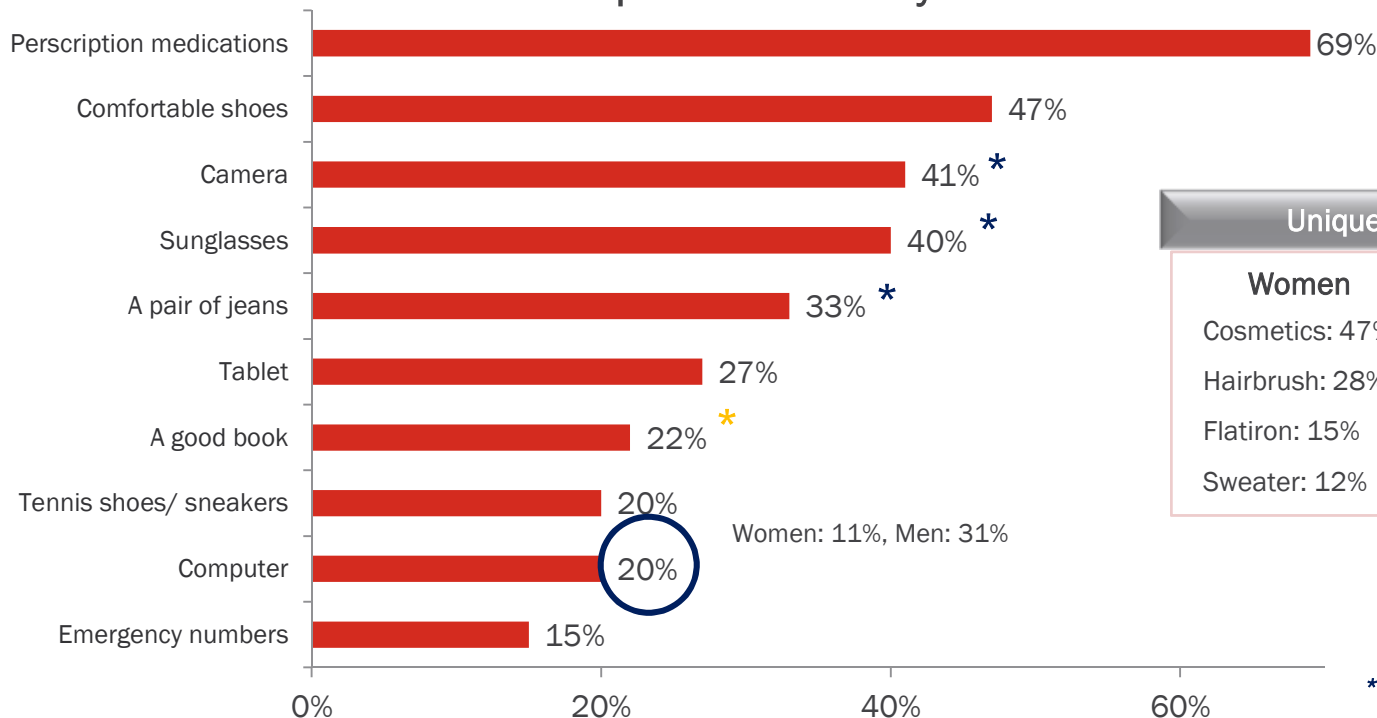
Base: Baby Boomers Using a Review Site (n=168)

Q11a: What specific online tools or sites did you use, or will you use, to help you with your trip?

What to Pack: Must Have Items

- Medications are essential when traveling, but beyond that, it seems most people need a comfortable pair of shoes, a camera and sunglasses to be all set.
- When it comes to gender, there are some distinct differences regarding what must make it into the suitcase (i.e. cosmetics for women vs. electric razor for men).
 - Leading-edge Gen X travelers are more likely to bring Sunglasses (49%) than a Camera (27%), and more likely to bring Workout Clothes (14%) than are those 50+ (8%).

Top Ten Items Always Packed



Unique Items by Gender	
Women	Men
Cosmetics: 47%	Electric Razor: 19%
Hairbrush: 28%	
Flatiron: 15%	
Sweater: 12%	

* Denotes men significantly higher than women

* Denotes women significantly higher than men

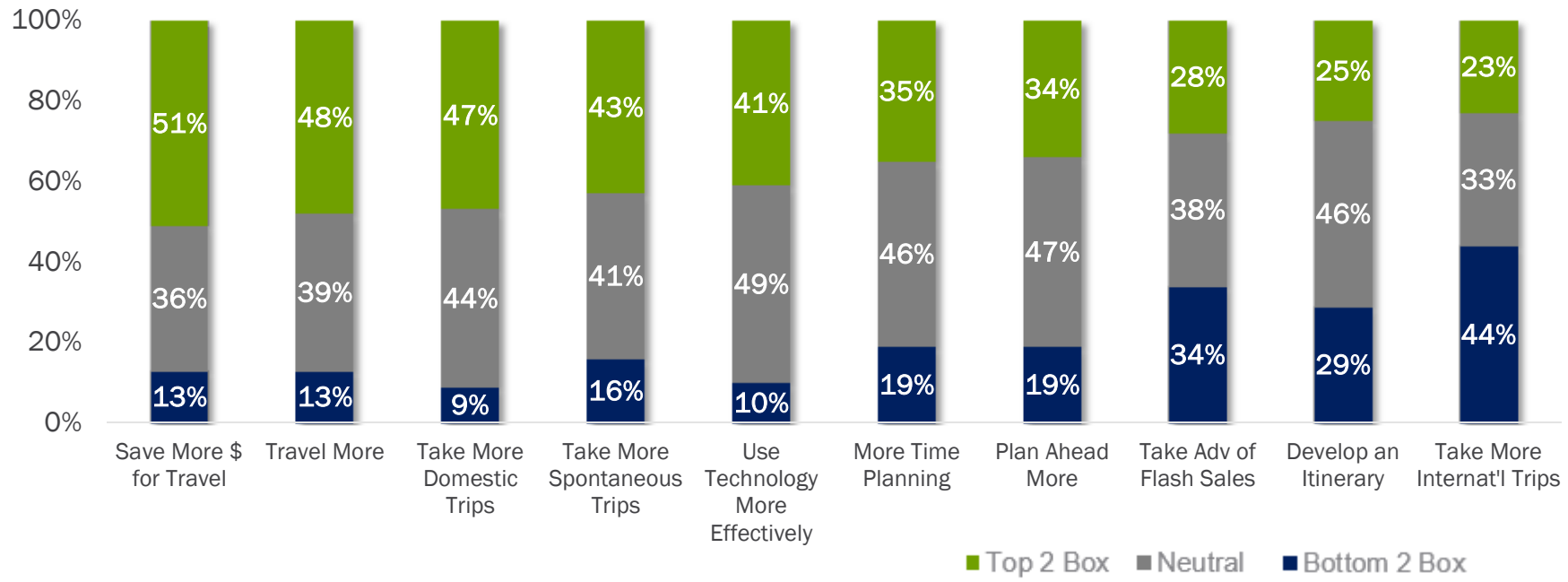
Base: 2015 Baby Boomer Travelers (n=819)

Q20b: Beyond the obvious (phone, credit card, cash), please identify up to five other things you always pack when you travel for personal reasons, regardless of where you go.

2015 Travel vs. 2014 Travel: What Will be Different

- Compared to 2014 travel, respondents are looking to save more money for travel in 2015. In addition, they want to take more trips, specifically domestically.
 - Leading-edge Gen X travelers are significantly more focused on saving for travel (62%) than are Baby Boomers (51%). In addition, 42% want to practice advance planning in 2015, compared to 34% of the 50+. Flash sales are slightly more popular with the Leading-edge Gen X cohort (34%) than Boomers (28%), as well.

Degree of Agreement in Change in Travel Behaviors; 2014 to 2015

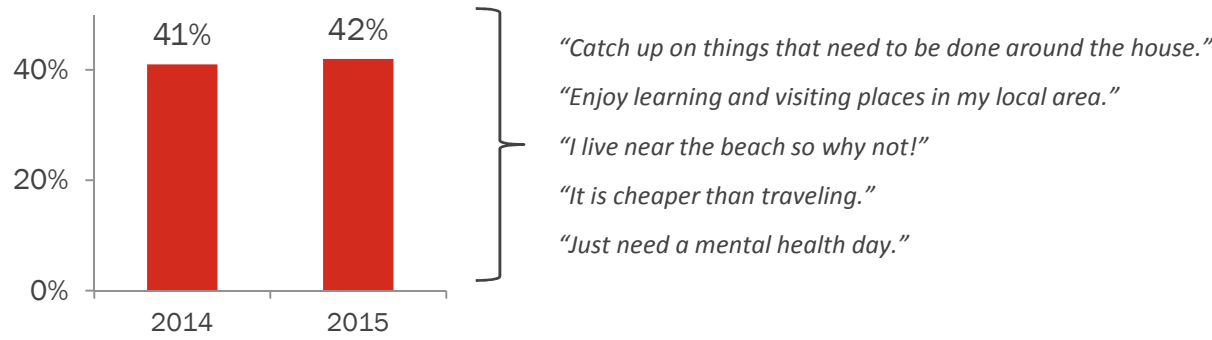


Base: Baby Boomers who took at least 1 Trip in 2014 (n=806)
 Q21: Compared to my personal travel in 2014, in 2015 I will.....

2015 Travel vs. 2014 Travel: What Will be the Same

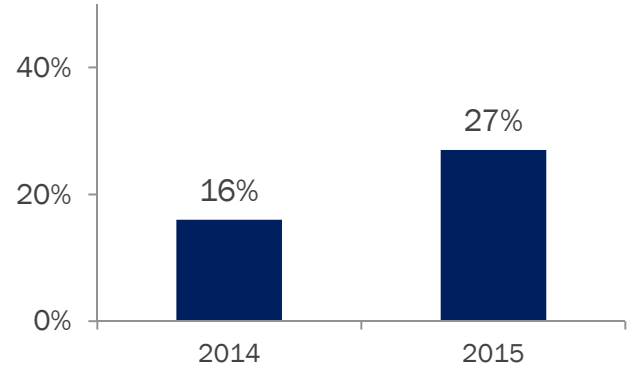
- Approximately four in ten Baby Boomers took a Staycation this year and anticipate taking one again in 2015.
 - 52% of leading-edge Gen Xers took a staycation in 2014 (52%) and 52% look forward to taking one in 2015, too.

Staycations; Taken/Anticipated and Why



- When it comes to cruises, Baby Boomers show significantly more interest in taking one in 2015 compared to what they did in 2014.
 - Although few Leading-edge Gen Xers (8%) took a cruise in 2014, far more expect to in 2015 (18%).

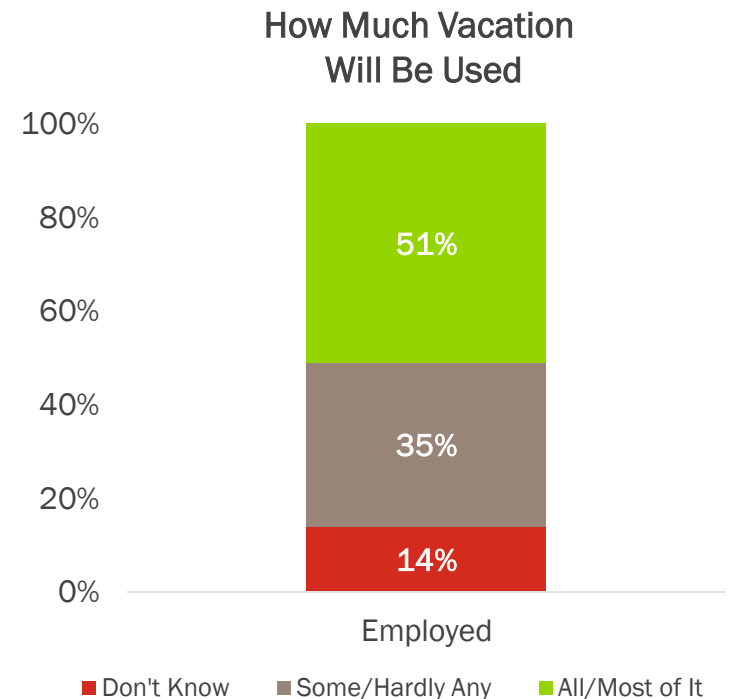
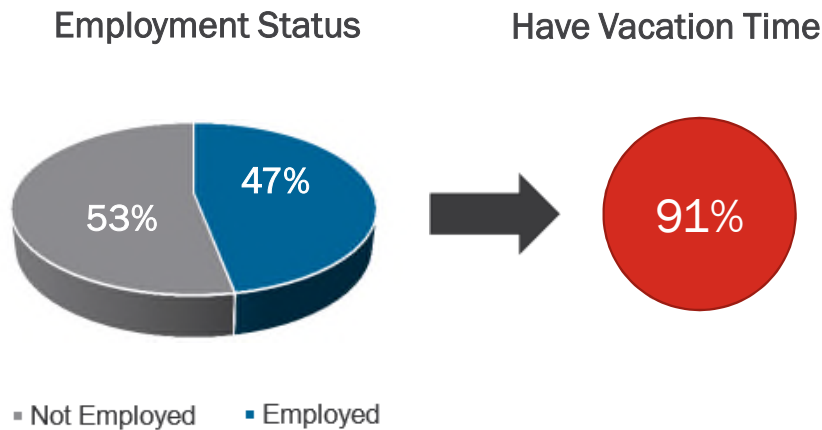
Cruises; Taken/Anticipated



Base: Baby Boomers who took at least 1 Trip in 2014 (n=806)
Q22: Did you use any of your vacation/free time in 2014 for a staycation? Q23. Do you plan on using any of your time in 2015 for a staycation?
Q24. In 2014, did you take a cruise? Q25. Do you plan to take a cruise in 2015.

Work and Travel in 2015

- Most employed Baby Boomers will have time off in 2015; however, only half (51%) believe they will use all or most of that time for personal travel.
 - There is no difference between employed Boomers and Leading-edge Gen Xers on these measures.



Base: Baby Boomer 2015 Travelers (n=819)
Q56. Which of the following best describes your current employment status?

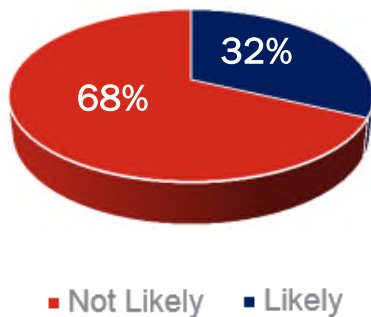
Base: Employed Baby Boomers (n=388)
Q14: Approximately, how much vacation time/paid time off will you have in 2015?

Base: Baby Boomers with Paid Time Off (n=354)
Q15: How much of your paid vacation time will you use for personal travel in 2015?

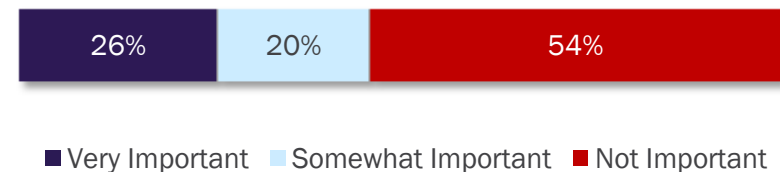
Work and Travel in 2015

- Among Baby Boomers with paid time off, one-third will bring some aspect of work with them on personal trips, which is not surprising as 46% believe it is at least somewhat important to stay connected to work while on vacation.
 - Among Leading-edge Gen Xers, their view on work and travel is the same as seen with Baby Boomers who are employed.

Likelihood to Bring Work



Importance of Staying Connected To Work



Base: Baby Boomers with Paid Time Off (n=354)

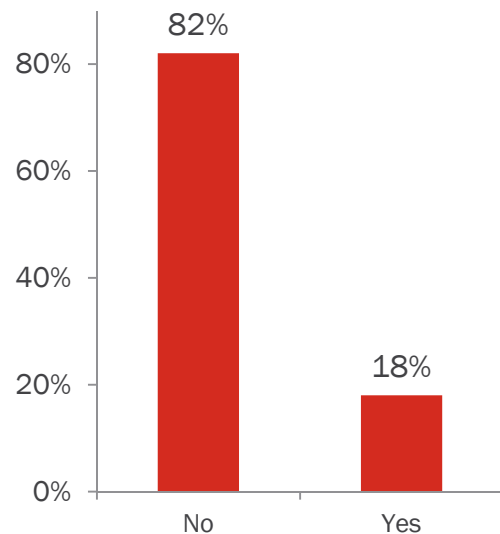
Q16: When you take vacation time from work in 2015, how likely are you to bring work with you, documents or devices (phone, computers, tablets, etc.)?

Q17: In your opinion, how important is it for you to stay connected to work when you are on personal travel?

Impact of World Events on Travel in 2015

- Although the majority of travelers report the current geo-political climate and global public health crises have not impacted their 2015 travel, those who say it has impacted their travel plans indicate a change in location or canceling trips altogether, along with strong concern for their safety and well-being.

World Politics or Health Events Impacting 2015 Travel Plans



How Impacted

27% Safety Concerns; not safe, dangerous, scared

27% Location; not interested in traveling there

24% Won't Travel; no more flying

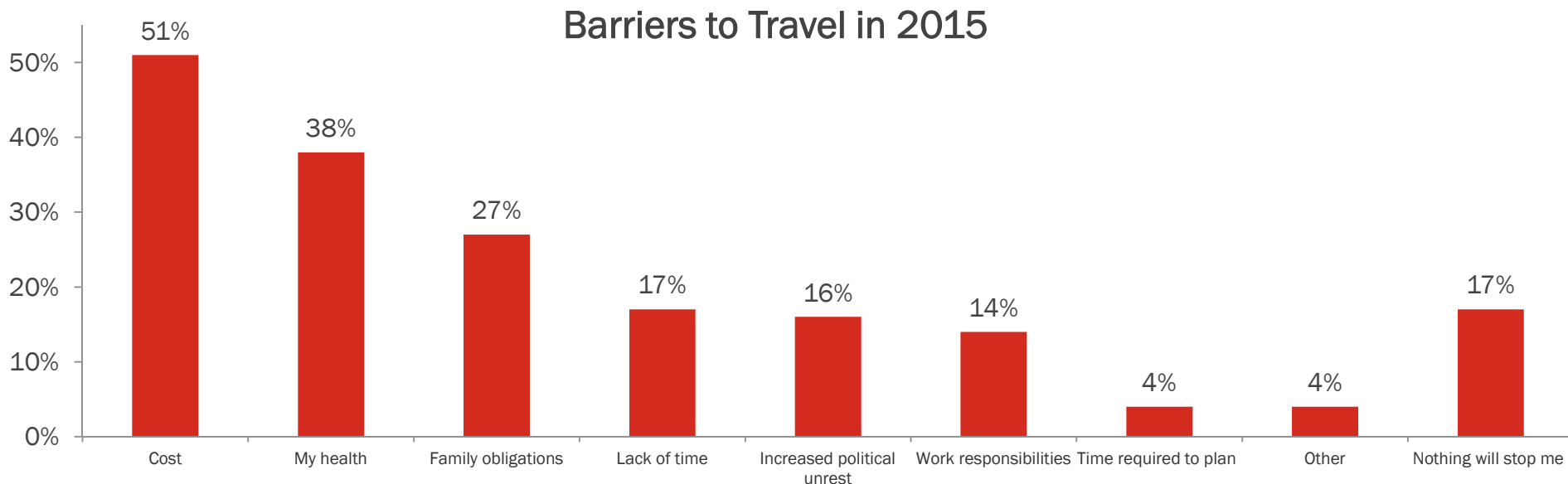
17% Disease; afraid of getting Ebola or other diseases

Base: Baby Boomers 2015 Travelers (n=819)

Q27a: Overall, has any of the current political events and/or health situations in Africa or the Middle East affected your travel plans in 2015? If yes, explain.

Barriers to Travel in 2015

- Cost is the number one barrier to 2015 travel, overall.
- Those 70+ tend to cite health concerns preventing them from taking the trips they want to take, while those age 50-59 simply cannot find the time, primarily due to work
 - Leading-edge Gen X travelers are significantly more likely than Boomers to cite cost (62%), lack of time (35%), and work responsibilities (27%) as barriers to travel, but far less likely to say health concerns (18%) are keeping them from the trips they want to take in 2015.

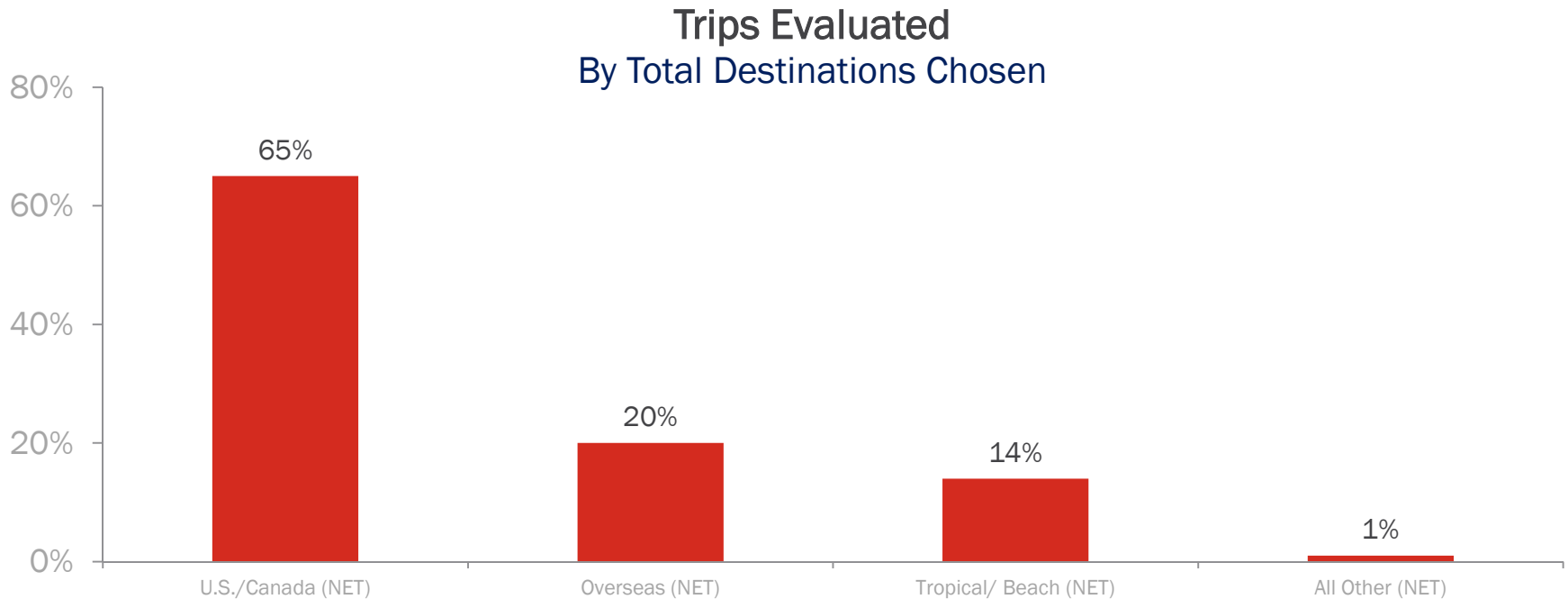


Q27b: Finally, what else, if anything, has prevented you, or might prevent you, from taking all the personal trips you'd like to take in 2015?
Base: Baby Boomers 2015 Travelers (n=819)

APPENDIX

Trips Chosen for Evaluation

- The trips evaluated in the survey are a sound reflection of the types of trips respondents anticipate taking in 2015; approximately a 60/40 split on domestic vs. international.



Q9a: What is the primary destination for this trip?

Base: Respondents Evaluating a Trip/Destination Known (n=780)

Methodology

- A 10-minute online survey was conducted among males and females, 45+, who have taken at least one trip 50 miles or more away from home, with a two-night stay, in the past two years.
- Respondents were further identified as having an intent to travel for personal pleasure (non-business travel).
- The survey was in field from October 13 – 21, 2014.
- A total on n=1,137 surveys were completed; final counts are detailed in the table to the right
- Final data has been weighted to U.S. Census for analysis

	Completes
Total	1137
Age	
45-49	318
50-59	310
60-69	300
70+	209
Gender	
Female	629
Male	508
RACE	
Caucasian/Other	738
African American	200
Hispanic	99
Asian American	100
Region	
West	280
South	393
Midwest	247
Northeast	217

Counts by Age Segment

- The focus of this analysis is among Baby Boomers (adults age 50+) who intend to travel in 2015.
- Leading-edge Gen X respondents (age 45-49) have also been evaluated to compare and contrast travel behaviors for 2015.
- Counts by these two age segments are as follows, weighted.

	Completes	
	Baby Boomers	Gen X
Total	819	318
Age		
45-49	-	318
50-59	320	-
60-69	301	-
70+	197	-
Gender		
Female	433	187
Male	386	131
Race		
Caucasian/Other	626	233
African American	85	37
Hispanic	74	33
Asian American	33	14
Region		
West	189	69
South	301	119
Midwest	181	66
Northeast	148	63

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