

AARP Travel Research: Solo Travel

August 2014

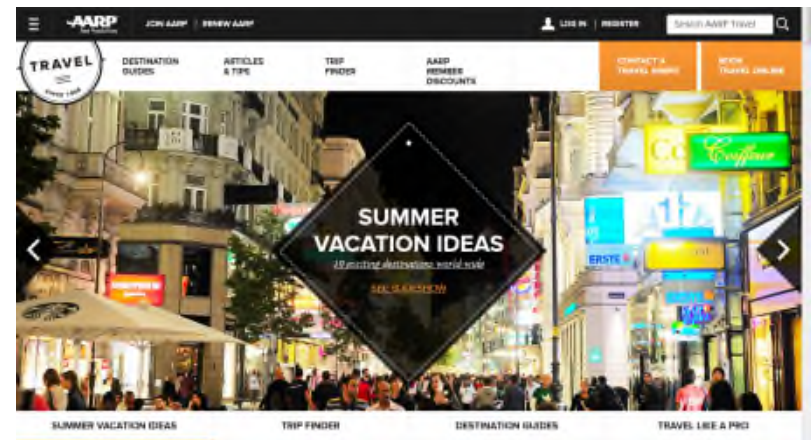
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Objectives

- To determine the motivation behind solo travel (necessity or desire)
- To uncover if solo travel is a pain point and what specifically about solo travel are points of pain (planning, booking, fees, safety, finding roommates, etc.)
- What kinds of solo trips have they taken
- What destinations are most common for solo travelers
- What is the best part and worst part of traveling solo

Executive Summary

Sizing the Audience

- The Solo Traveler audience is not extremely large, but it is active.
 - Among AARP's target audience of those 45+ who have traveled for leisure in the past 2 years and who use at least one online travel website, 37% claim to have taken a solo trip in the past.
 - On average, they have taken 4 solo trips
 - 81% are likely to take another solo trip in the next 12 months
- The Solo Traveler skews younger, 50-59 years old, and is more likely to be single or divorced than are those who are just thinking about solo travel, who skew married.
- But there is a large portion of the 45+ travel audience who show no interest in solo travel. That said, one-fourth admit the idea of traveling solo has stopped them from taking trips they would otherwise want to take.

Executive Summary

The Solo Traveler

- Whether it is the first trip or most recent trip, a solo trip is more likely a result of not having anyone available to travel with at that particular time versus the sheer desire or enjoyment of traveling alone.
- Most solo traveling takes place domestically without a tour group. Many take these trips so they can go somewhere they want to go or to treat themselves.
- And although many use online sites to plan and book their trip, social media sites have little influence on their solo travel decisions.
- Most choose a destination they have been to before, most likely a place they have been to with others.
 - The overwhelming destination of choice is a city/town, with the beach a distant second.
- The Solo Traveler is looking for a laid back and relaxing vacation. The best part of a solo trip is simply the chance to get out of town and to do something nice for themselves.
- Those who take solo trips are extremely satisfied with the experience, so much so that 81% say they plan on taking another one in the next 12 months.
 - This is not too surprising, since very few indicate having experienced issues planning their solo trip or having safety concerns.

Executive Summary

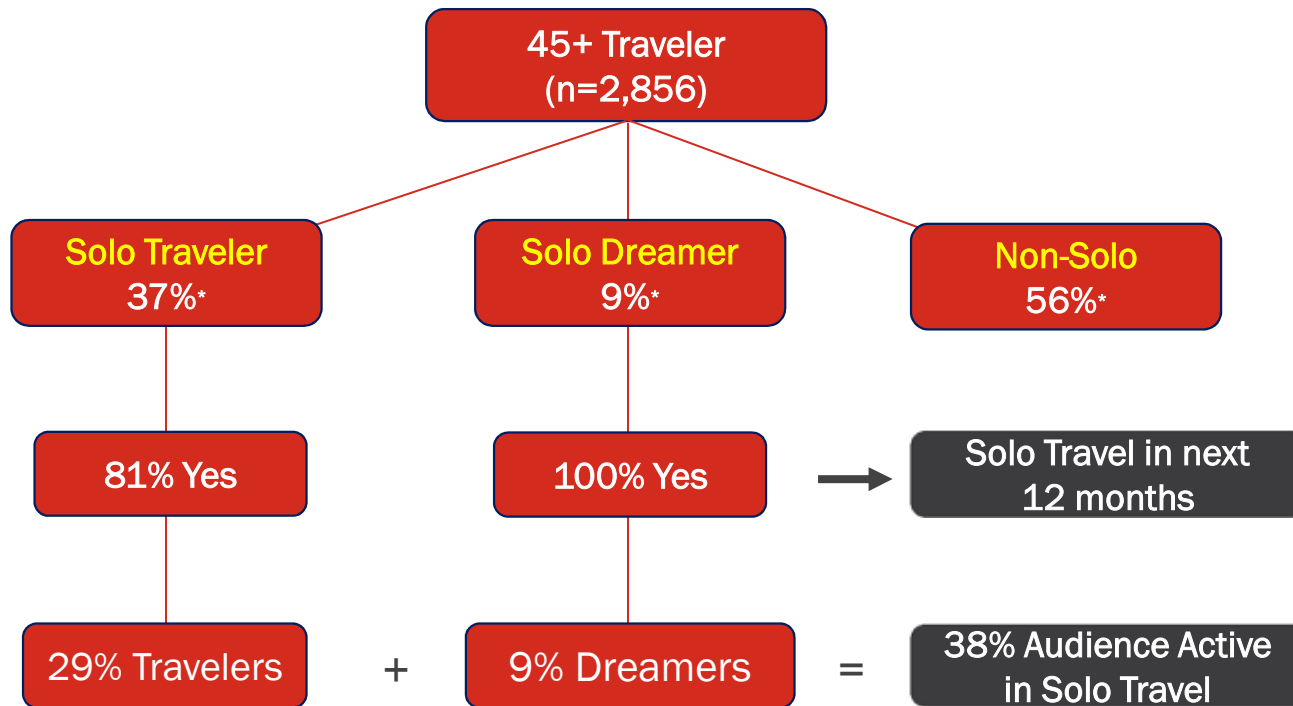
The Solo Dreamer

- Those who are planning to take a solo trip, the Dreamers, are doing so just because they want to and not necessarily because of any significant change in their life.
- Like the Solo Traveler, the Solo Dreamer is apt to use online resources to plan and book their trip, but few are influenced by social media sites, and it is definitely not where they draw their inspiration for taking such a trip.
- Their desire to go somewhere they want to go, an opportunity to treat themselves or to check something off their bucket list are the true motivators of solo travel among Dreamers.
- Although most have yet to solidify their plans for their solo trip, among those in the planning phase, 62% have already chosen their destination – which is primarily a city/town they have been to before with family or friends.
- They look forward to a laid back and relaxing vacation with little concerns about planning their trip. In fact, the majority do not express any concerns over the safety of traveling solo. Those with concerns mention budgeting, solo fees, and identifying activities at their destination.

SIZING THE AUDIENCE

Solo Travel Audience

- Among the 45+ travel audience, approximately 4 out of 10 have a listening for marketing and opportunities specifically directed at the solo traveler.



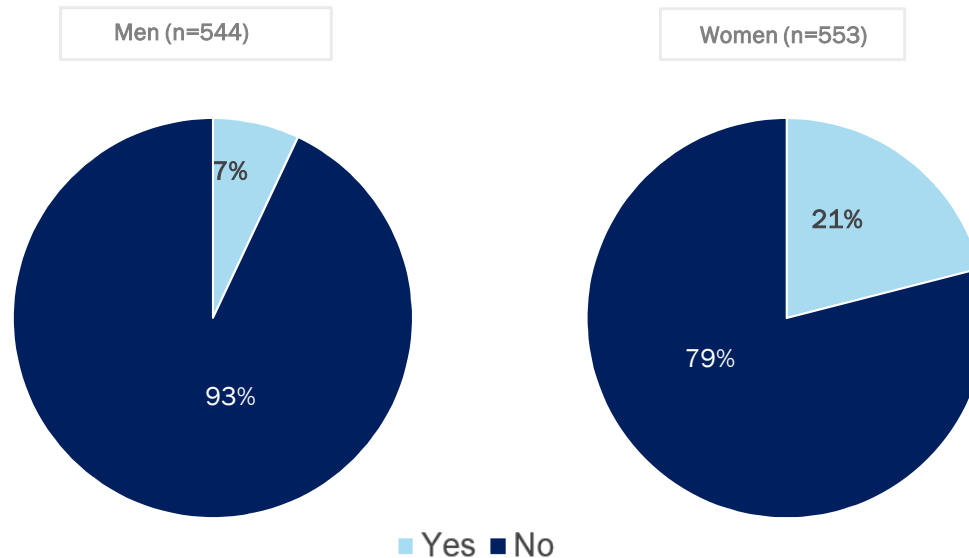
S9: Thinking about the leisure traveling you have done in the past, have you taken any trips solo? Base: Screener, 45+ Travelers (n=2,856)

S10: Are you currently planning or thinking about taking a solo leisure trip in the next 12 months? Base: Screener, 45+ Travelers (n=2,856)

Q24a: How likely would you be to plan another solo trip in the next 12 months? Base: Total Solo Travelers (n=881)

Solo Travel Hesitations

Hesitant to Travel Solo



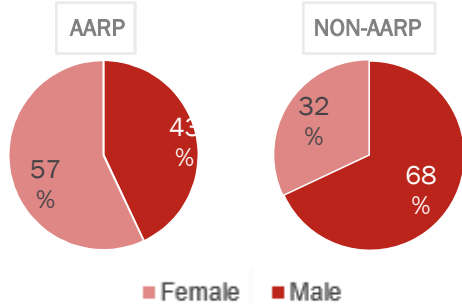
- Women are more likely than men to indicate they have not taken trips they would like to because they don't wish to travel solo. This is true among both the population active in solo travel and among those who are not.

Base: Total Traveler & Dreamer Respondents (n=1,097)

Q50: Does the idea of having to travel solo keep you from taking particular trips you really want to take?

Audience Profiles

- Among AARP’s target audience of those 45+ who have taken a leisure trip in the past two years, those who have taken a solo trip, dream about a solo trip, or have no interest in a solo trip do not differ dramatically at a demographic level.
- That said, the Solo Traveler and Dreamer skew slightly younger and are more likely to be single or divorced than the non-traveler.
- Among Solo Travelers, those 45-49 are predominately male (78%). And among Blacks, they are predominately female (80%).
- Also, among Solo Travelers, AARP members lean female while non member Solo Travelers lean male.



Audience Profiles			
	Solo Traveler	Solo Dreamer	Non-Solo Traveler
Base:	881	216	1577
AARP Membership	(a)	(b)	(c)
Member	73%	73%	75%
Non-Member	27%	27%	25%
Gender			
Male	50%	50%	50%
Female	50%	50%	50%
Age			
45 - 49	9%	10%	7%
50 - 59	50% c	54% c	44%
60 - 69	33%	28%	34%
70+	8%	8%	15% ab
Ethnicity			
Caucasian/Other	54% b	45%	62% ab
Black	16% c	20% c	9%
Hispanic	21% c	24% c	17%
Asian	9%	11%	12% a
Income			
Average	\$90K	\$92K	
Marital Status			
Single/Never Married	16% b	10%	
Married/Living Together	53%	67% a	
Divorced/Seperated	23% b	16%	
Widow	7%	7%	

KEY FINDINGS: TRAVELERS

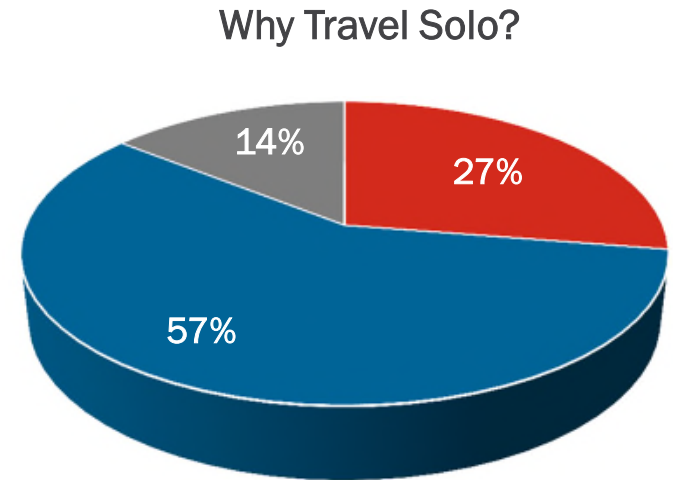
Solo Traveling – Why & When

- Why is the 45+ embarking on solo travel? While more than a quarter (27%) enjoy traveling solo, most (57%) take a solo trip because they do not have someone to travel with at the particular time.

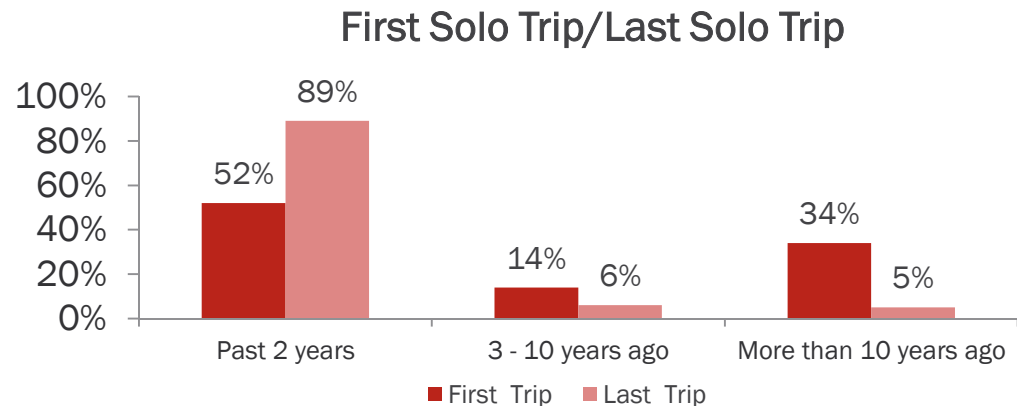
- There are no significant difference by gender

Average Number of Solo Trips: 4

- Among 45+ travelers, solo travel is a relatively new experience: over half took their first solo trip in the past two years.



■ Enjoy/Prefer to Travel Solo ■ No One To Travel With ■ Other



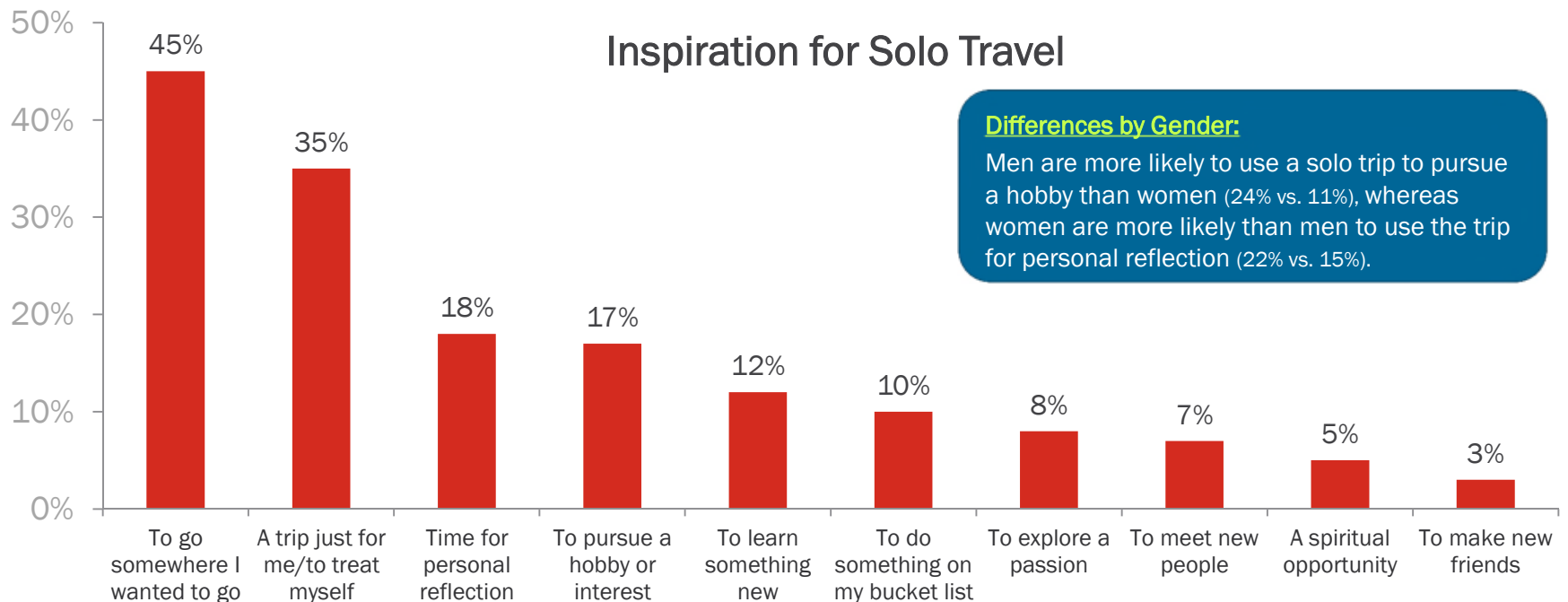
Base: Total Solo Travelers (n=881)

Q5: And which of the following would you say was your initial reason for traveling solo on this most recent trip?

Q2/Q4: When did you take your first/most recent solo trip?

Inspiration for Trip - Solo Traveler

- Although there are a number of sources of inspiration, the primary motivators for traveling solo are a desire to go to a specific destination or simply to treat one's self.
 - Blacks are more likely than Caucasians or Hispanics to use a solo trip as a spiritual opportunity (10% vs. 4% and 4%, respectively).
 - Those single or divorced are twice as likely as those married to cite “to meet new people” as their inspiration for traveling solo (13% and 8% vs. 4%, respectively).

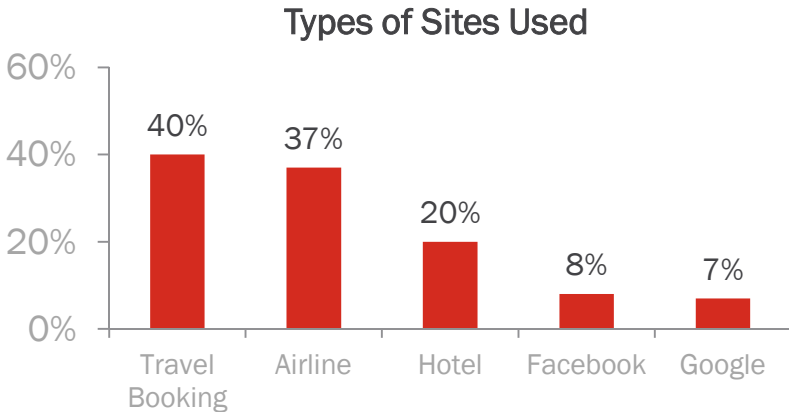
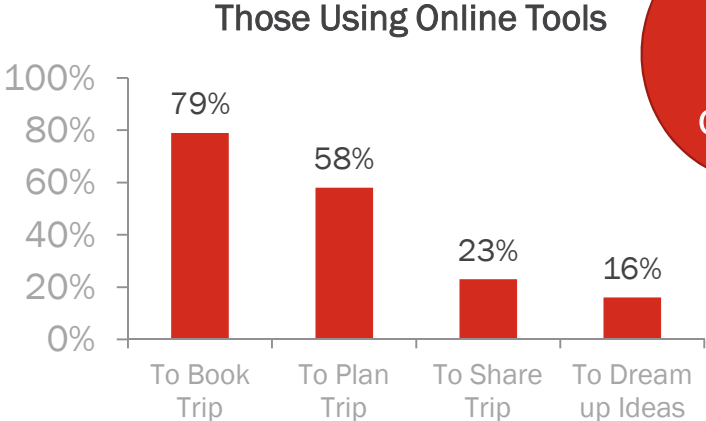


Q7: For your most recent solo trip, what was your inspiration or motivation for traveling? Base: Total Solo Travelers (n=881)

Planning the Trip – Solo Traveler

- The Solo Traveler makes all the arrangements themselves, with many using online tools to help them book their trip.
- About half will also use online tools to help them plan their trip, but far less will use it to dream up ideas.
- Popular travel sites used:
 - Expedia
 - Trip advisor
 - Travelocity
- American is the dominate choice among airlines for booking solo trips.

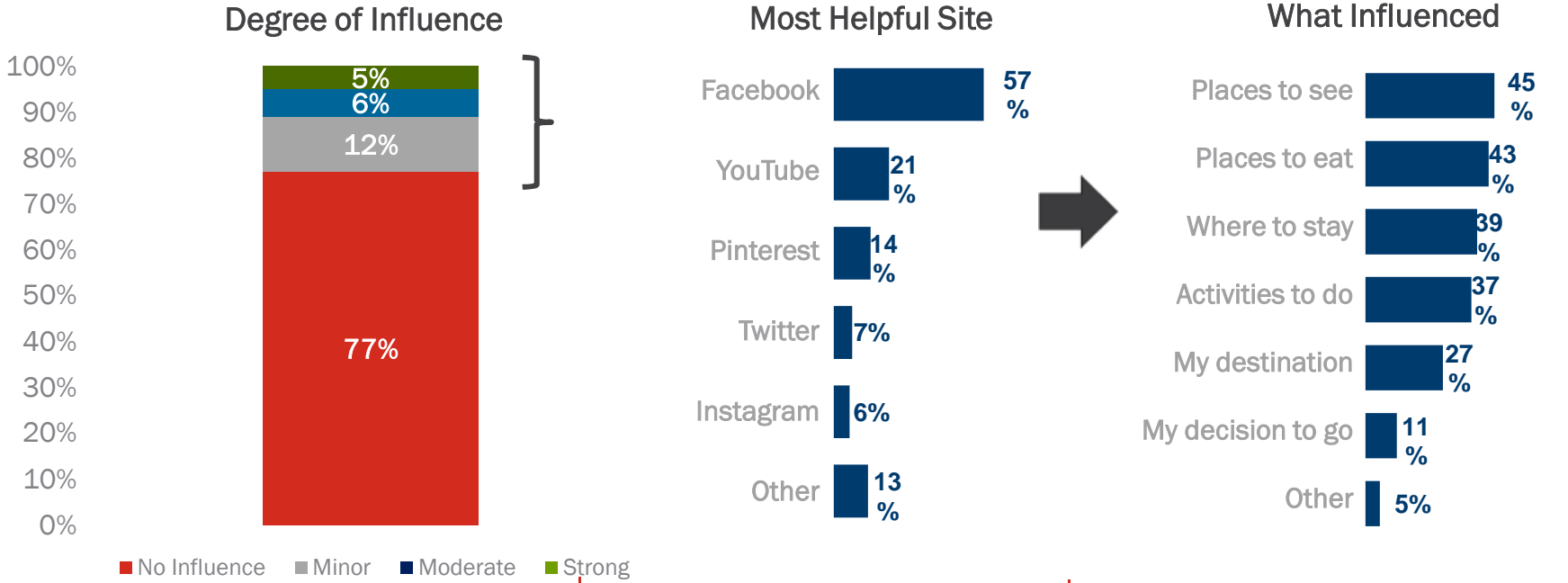
95%
Plan
Their
Own Trip



Q8. Who made the majority of the plans and arrangements for your trip? Base: Total Solo Travelers (n=881)
Q9: Did you use any online tools to help you....? Base: Total Solo Travelers (n=881)
Q9b: What specific online tools or sites did you use? Base: Solo Travelers who used online sites (n=749)

Social Media's Influence - Solo Traveler

- Social media sites have little influence on a Solo Traveler's *decision* to take their most recent trip.
 - Social media does have a greater influence, however, among those aged 45-49 than among those aged 50+.
- Among those who do use such sites, Facebook is noted as most helpful, with input on what to see and do being the most sought after content.
 - Women gravitate more toward Pinterest while men gravitate more toward Twitter.
- According to other AARP research, about four in ten adults aged 50+ are accessing social media sites at least daily. As social media adoption and usage becomes more prevalent with this cohort, social media may play a larger role in solo travel.



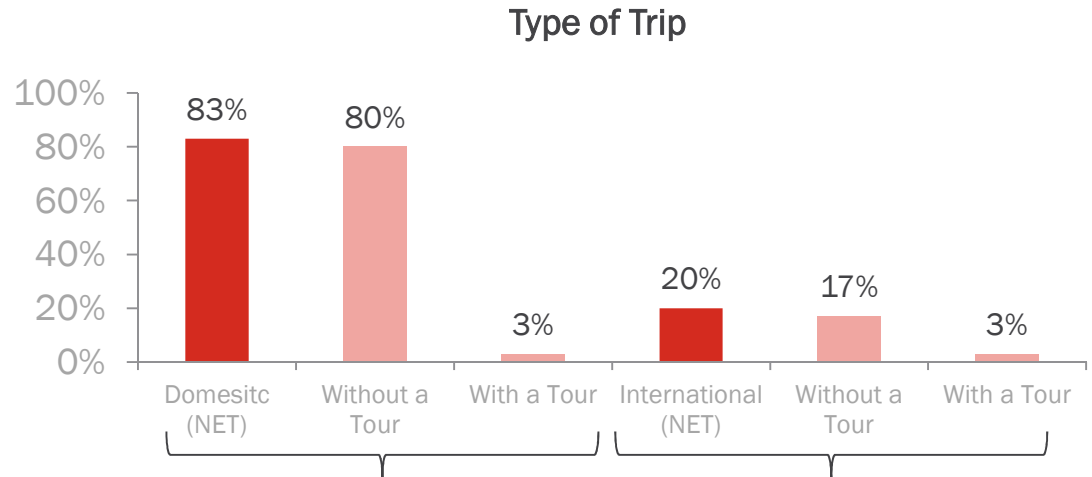
Base: Total Solo Travelers (n=881)
 Q10: What influence, if any, did social media have on your decision to take your most recent solo trip?

Base: Solo Travelers Influenced by Social Media (n=203)
 Q11: Which social media sites, overall, did you find most helpful?

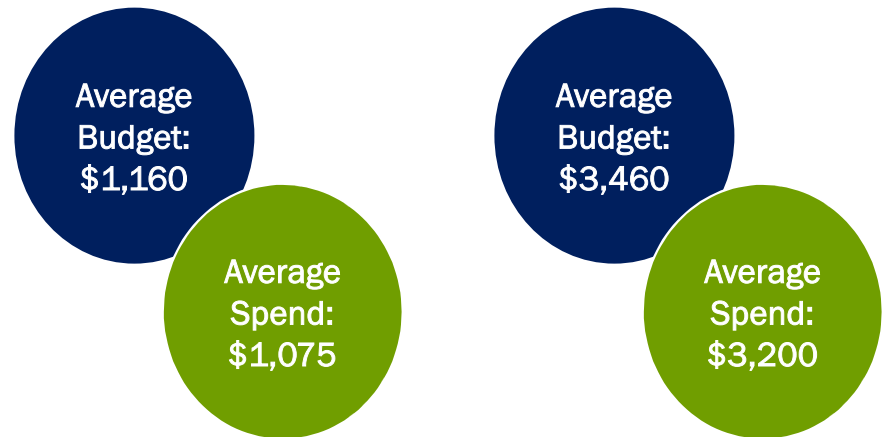
Base: Solo Travelers Influenced by Social Media (n=203)
 Q10b: What aspects of your trip did social media influence?

Trip Details – Solo Traveler

- Most solo trips are to a domestic destination without a tour group
 - Of those traveling internationally, men (20%) are more likely than women (14%) to go it alone.



- Among those who have a budget for their solo trip (57%), the average anticipated spend for a domestic trip is ~\$1,100 and ~\$3,500 for an international trip.
- Most appear to stick to their desired budget while on the trip.



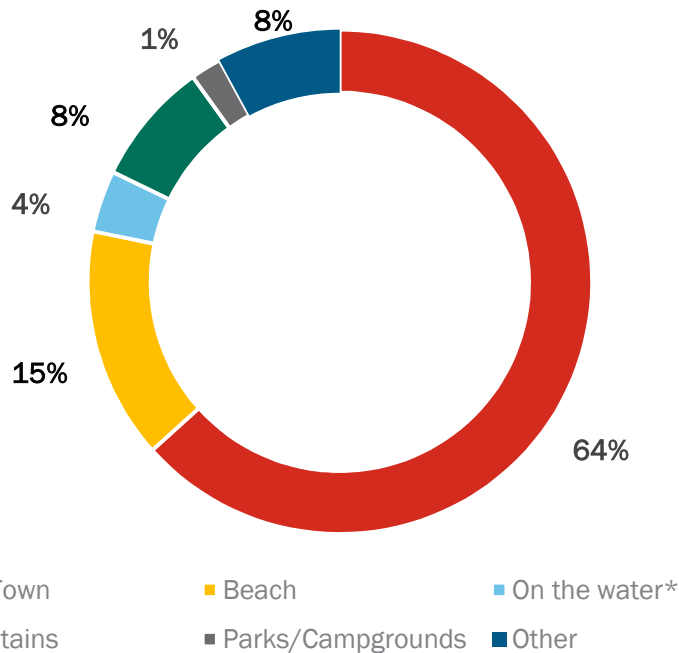
Base: Total Solo Travelers (n=881)

Q12. Which of the following best describes the type of trip you took?

Q13a: When you were first planning this trip, approximately how much did you budget for it? Q13b: And approximately how much did this trip cost you?

Type of Destination - Solo Traveler

By Way of Location



*On the water includes, Cruise, Lakes, Rivers

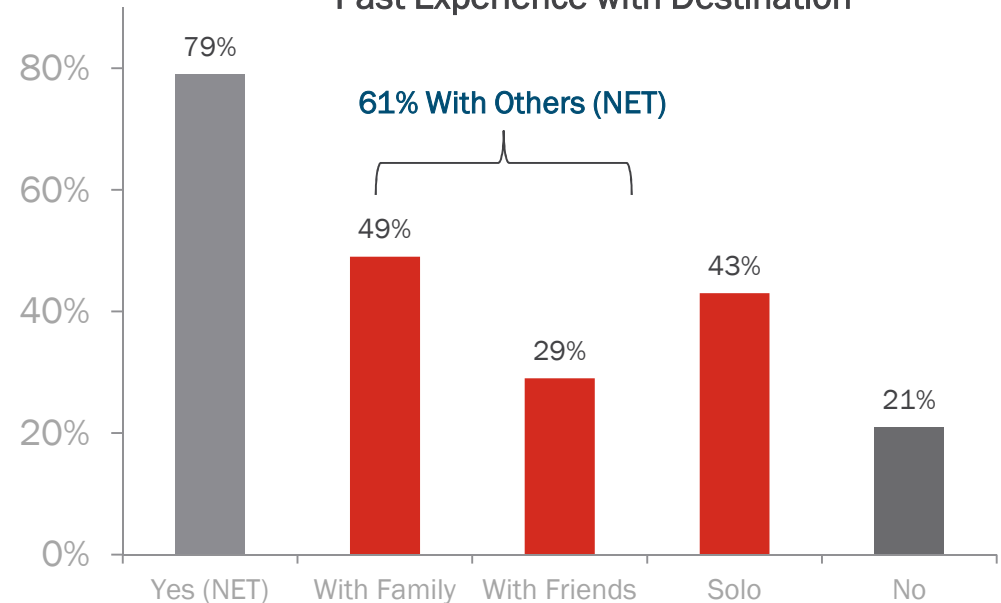
- A city/town is by far the most popular destination for the Solo Traveler.

Base: Total Solo Travelers (n=881)

Q14c: Had you ever traveled to this location before?

Q16: Which of the following best describes the type of location you visited on this trip?

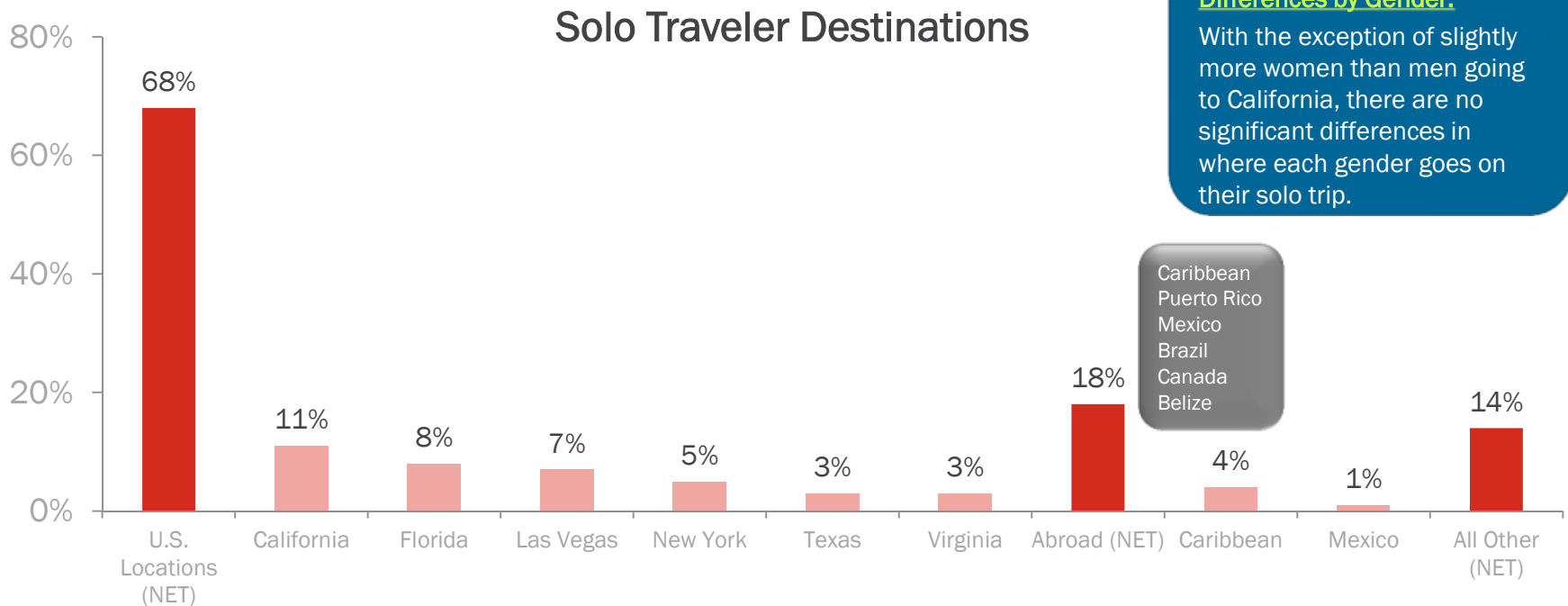
Past Experience with Destination



- Solo Travelers tend to pick destinations they have been to in the past, primarily with others.

Actual Destination – Solo Traveler

- Most solo trips are taken within the U.S. with sunny destinations topping the list; California, Florida, Las Vegas
 - Significantly more African Americans choose a domestic destination than other ethnicities.
 - Married solo travelers are also more likely to pick a domestic destination, where as those of another marital status (single, divorced, widowed) are more likely than married travelers to select an international destination.

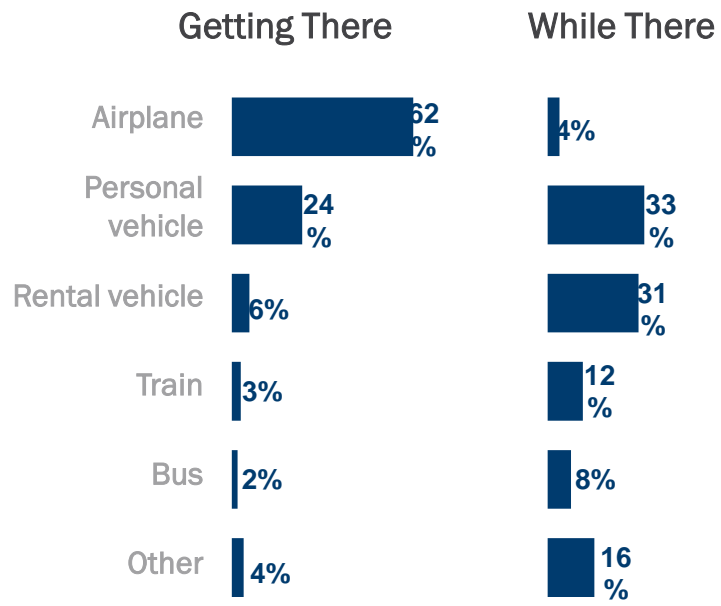


Q14a: Where did you go the last time you traveled solo? Base: Total Solo Travelers (n=881)

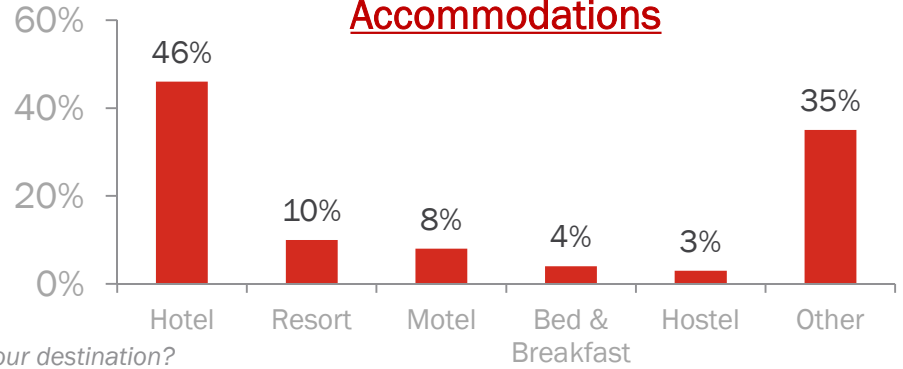
Transportation/Accommodations – Solo Traveler

- The majority of Solo Travelers take a plane to their destination of choice.
- While at their destination, they appear to use a variety of transportation options with a vehicle, personal or rented, being the most common.
- A hotel is the most popular accommodation choice among Solo Travelers.
 - Those who say ‘Other’ reference personal homes, condos, timeshares, etc.

Transportation



Accommodations

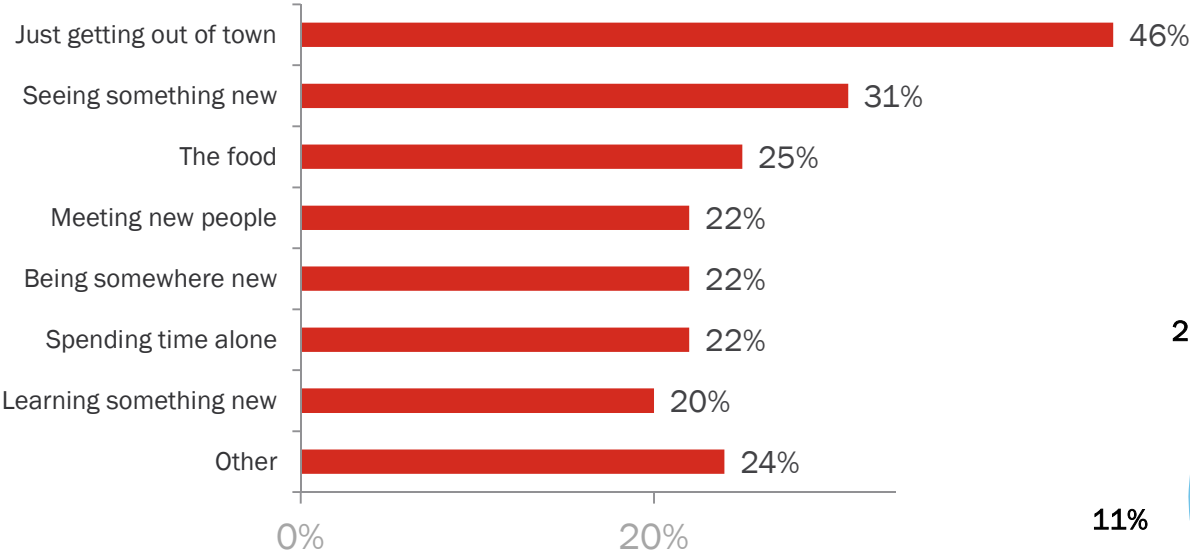


Base: Total Solo Travelers (n=881)
 Q15: What was the primary mode of transportation you used to get to your destination?
 Q15a: When you were at your destination, what type of transportation, if any, did you use?
 Q16b: Which of the following best describes the accommodations you stayed at on this trip?

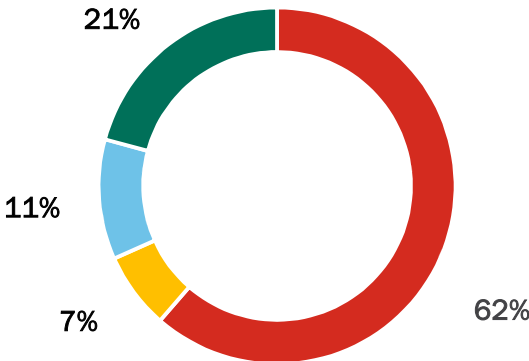
Benefits of Most Recent Solo Trip

- Based on their most recent trip, Solo Travelers say just getting out of town was the best part. It allowed most the opportunity to do something nice for themselves.

Favorite Part of Most Recent Solo Trip



What Trip Allowed

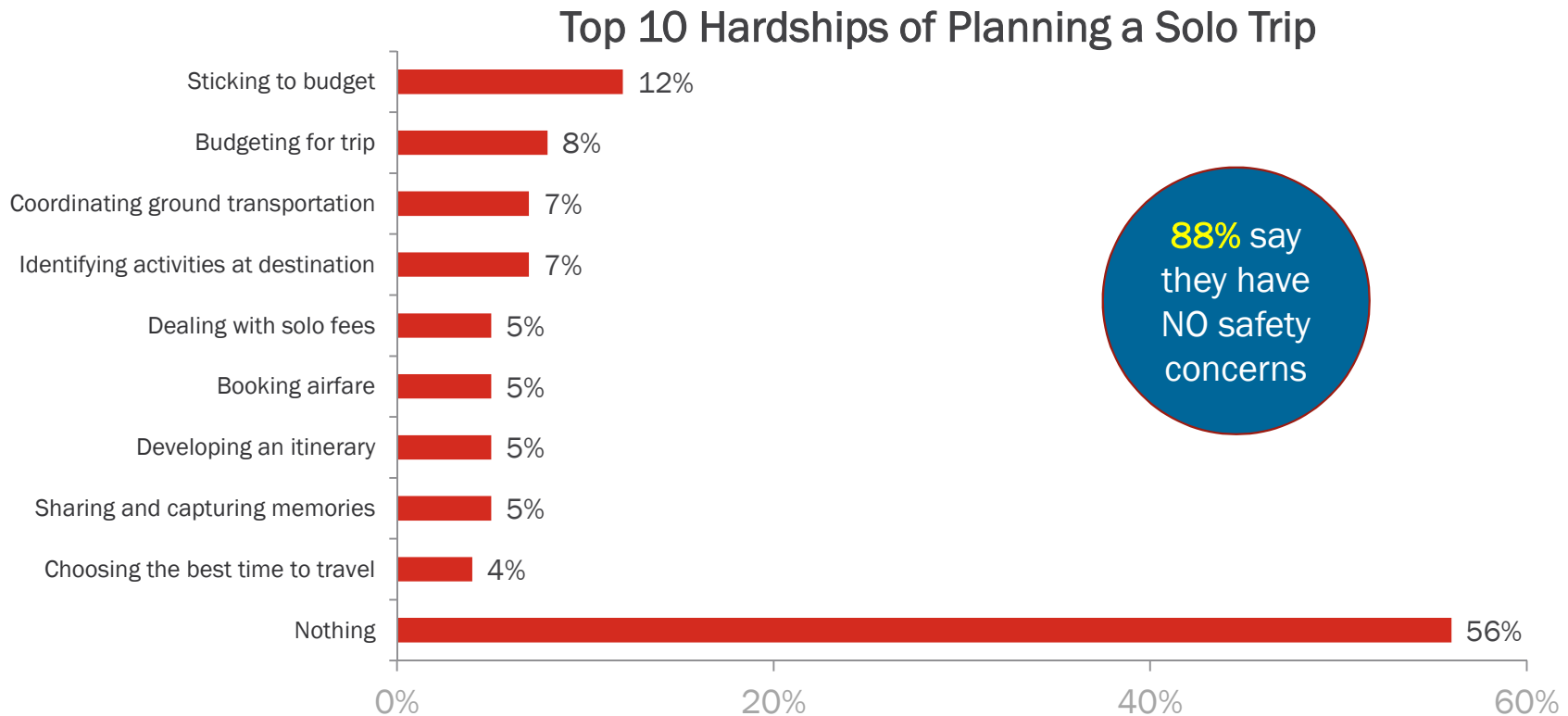


Treat myself Bucket list Personal goal Other

Base: Total Solo Travelers (n=881)
Q19a: What was your favorite part of your trip?
Q19b: Which of the following best describes what this trip allowed you to do?

Travel Planning Hardships – Solo Traveler

- Solo Travelers do not express having many issues planning their trip. Among those who do, budgeting and sticking to that budget top the list.
- The vast majority do not have any safety concerns leading up to their solo trip, regardless if the Solo Traveler is a man or a women.



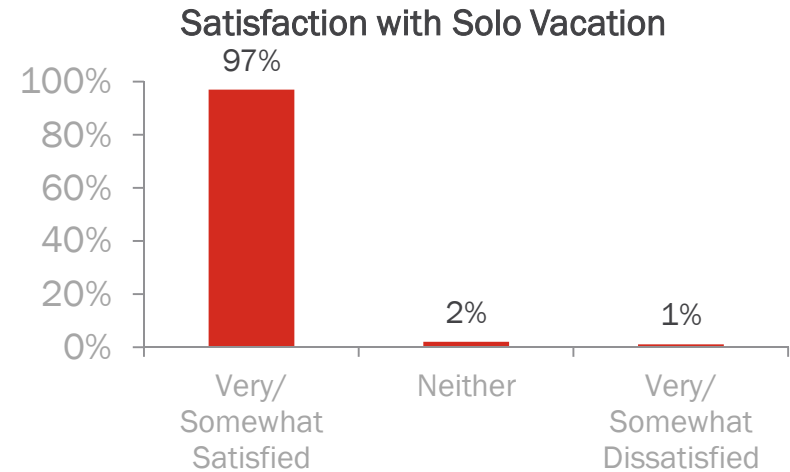
Base: Total Solo Travelers (n=881)

Q22: What part of the travel process, if anything, was harder to do than you expected?

Q23a: Before you took your most recent solo trip, did you have any safety concerns?

Solo Travel Feedback

- Although many found some part of solo traveling to be less than ideal, nearly all were satisfied with the experience when it was all said and done.
- It appears the ability to set your own schedule and just tend to your own needs is a big win.



Best Part of Solo Travel

I don't have to please others
I do what I want when I want
My own schedule
Alone time/time to myself
Freedom

5% Nothing

Worst Part of Solo Travel

Not being able to share it
with anyone
Being alone
Dining alone
Miss the companionship
Lack of conversation
29% Nothing

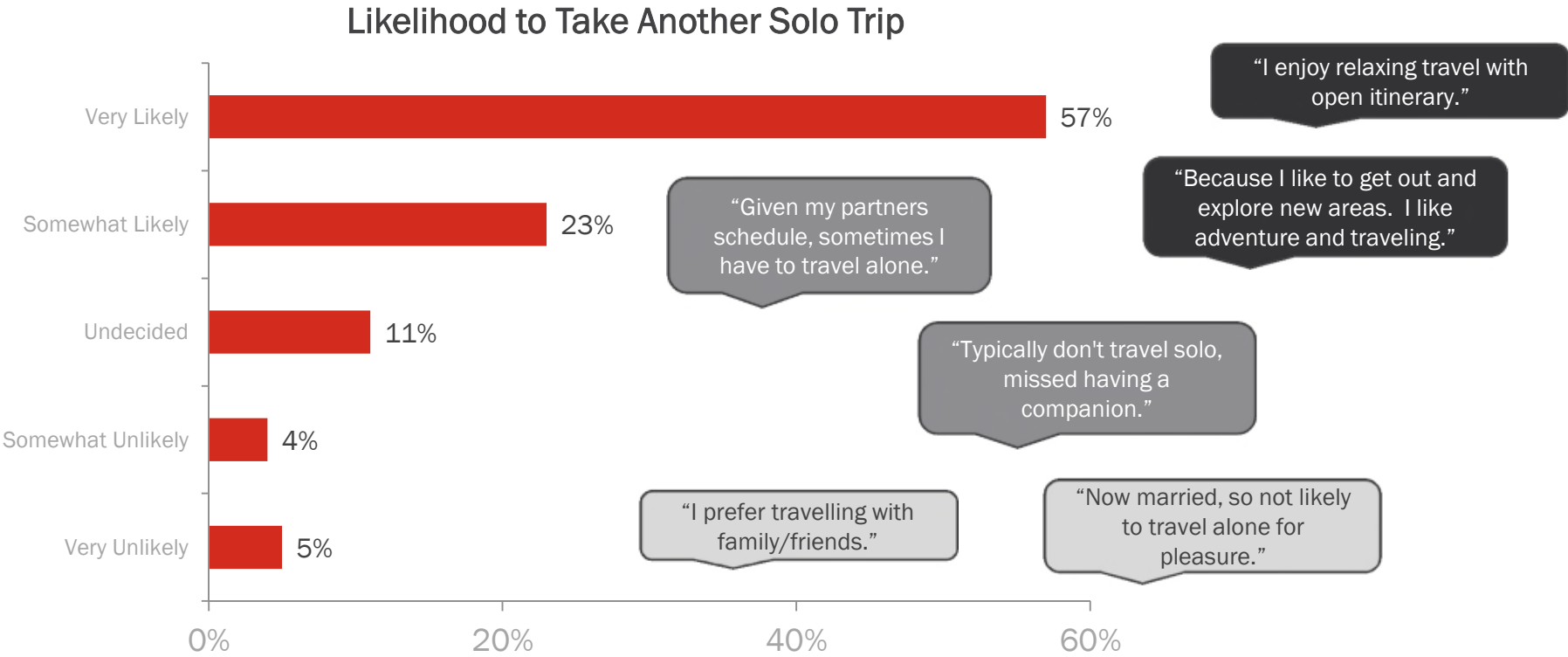
Base: Total Solo Travelers (n=881)

Q20: When it was all said and done, how satisfied were you with your most recent solo trip?

Q21a/b: What, if anything, did you like BEST/LEAST about solo traveling?

Likelihood to Solo Travel Again

- Although 81% say they are likely to take another solo trip, from the comments shared, only those who say they are ‘very likely’ seem committed to the idea.



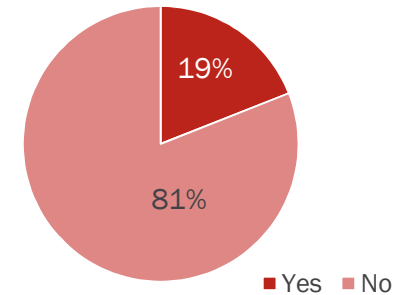
Q24a/b: How likely would you be to plan another solo trip in the next 12 months? And why is that? Base: Total Solo Travelers (n=881)

KEY FINDINGS: DREAMERS

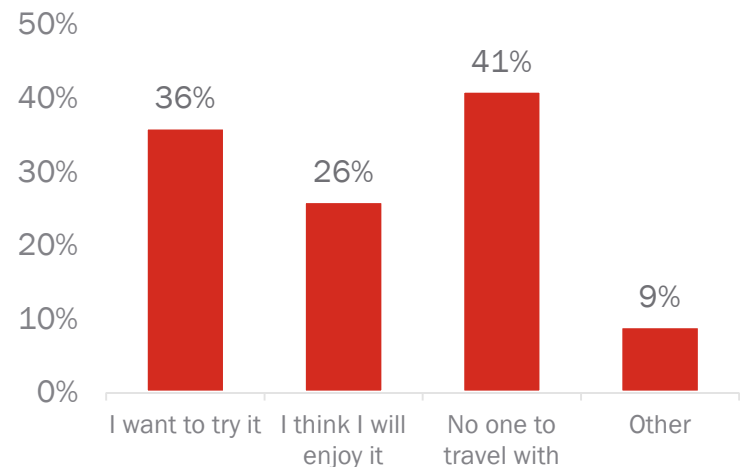
Why Solo Travel – Solo Dreamer

- The majority of those thinking about or planning a solo trip in the next 12 months, the Dreamers, are not considering solo travel because they experienced a major life event.
- It appears reasons for solo travel are a combination of those who do not have anyone to travel with at a specific time and those who simply want to give it a try.
 - Women are more likely than men to claim no travel companion as their reason for a potential solo trip.

Are There Life Changes at Play?



Why Travel Solo?



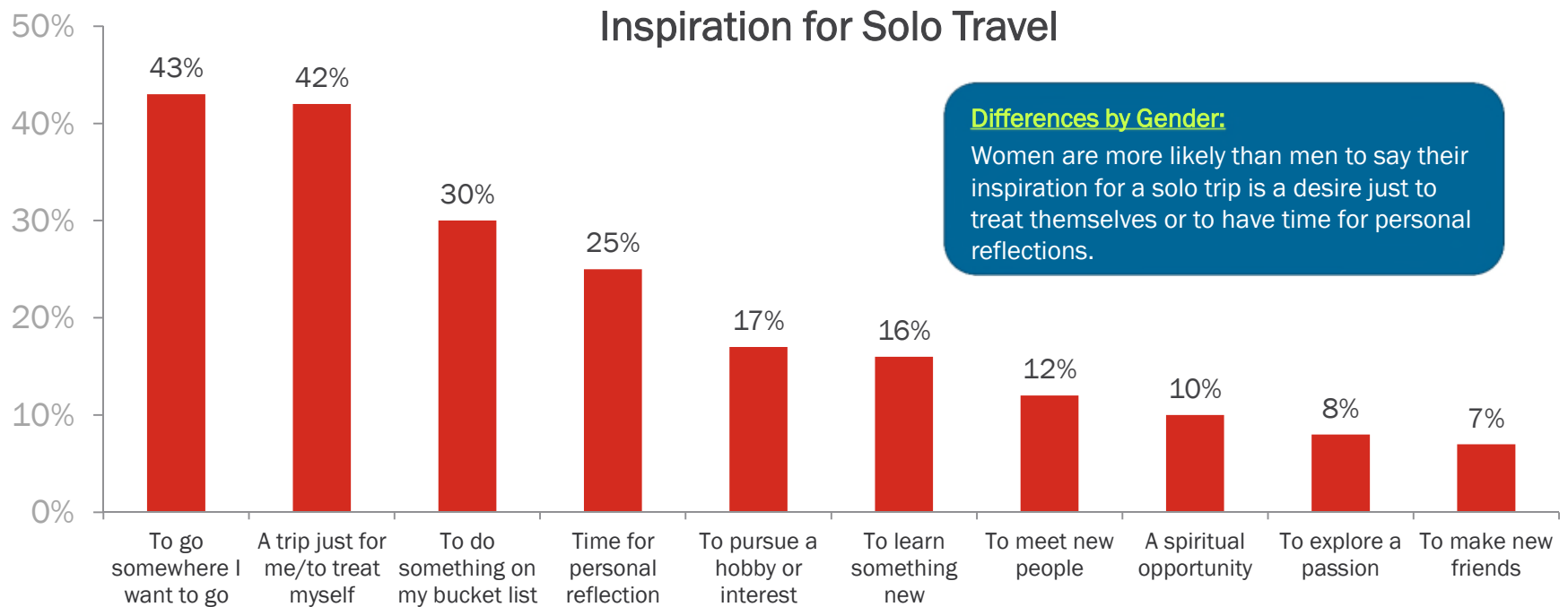
Base: Total Solo Dreamers (n=216)

Q25: Have there been any significant changes in your life that may be influencing your desire to travel solo?

Q26: Which of the following best describes why you are considering or planning on a solo trip in the next 12 months? Select all that apply

Inspiration for Trip- Solo Dreamer

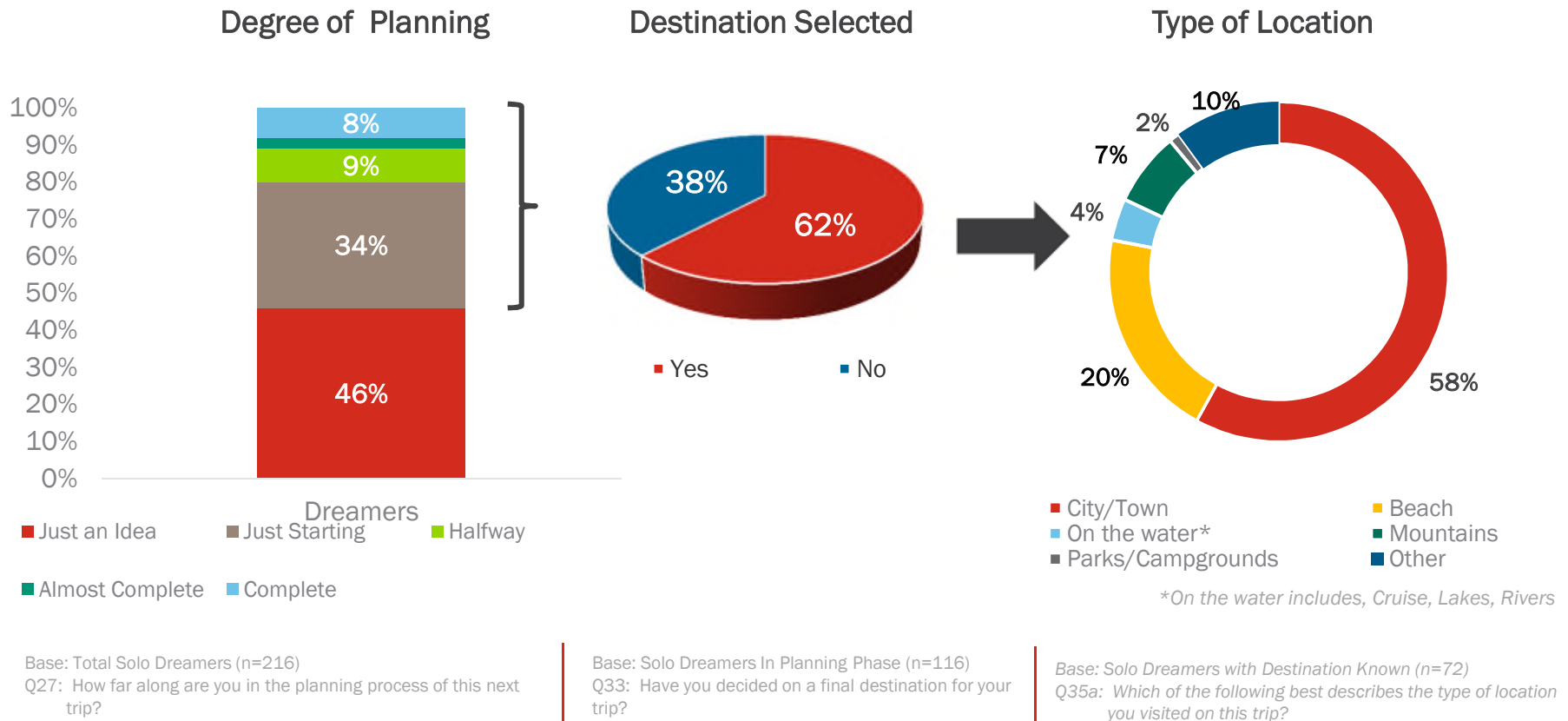
- As seen with Travelers, the primary inspiration for the Solo Dreamer is a desire to go to a specific destination or simply to treat one's self.
- But different than the Traveler, the Dreamer may also be looking at this trip as an opportunity to check something off their bucket list.



Q36: What was your inspiration or motivation for taking this trip? Base: Total Solo Dreamers (n=216)

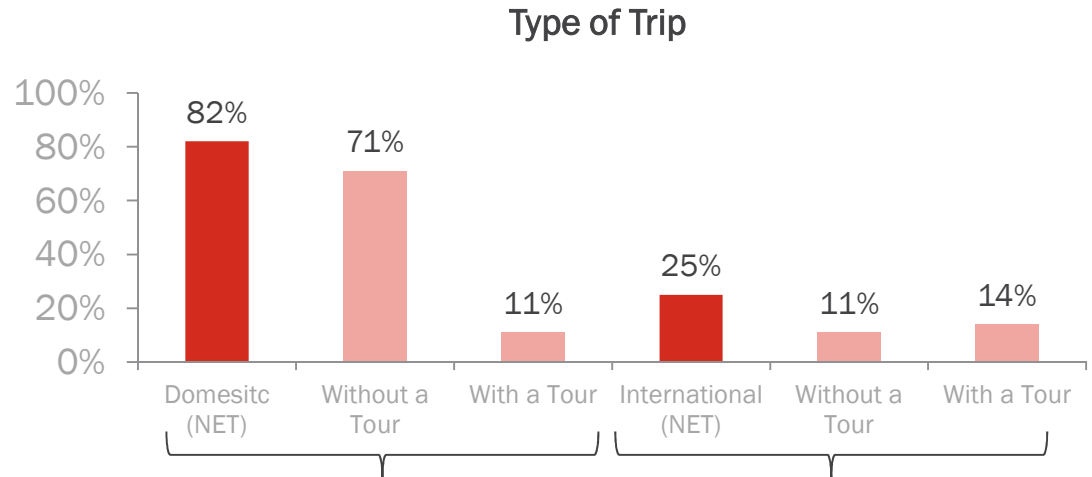
Travel Plans – Solo Dreamer

- Although many have not yet solidified their plans, among those in the planning phase, 62% have identified their destination, with most headed to a city/town.



Trip Details – Solo Dreamer

- Solo Dreamers have primarily set their sights on a domestic trip without a tour group.
 - Men who travel internationally are more likely than women to travel without a tour group.



- Among those who have a budget for their solo trip (48%), the average anticipated spend for a domestic trip is ~\$1,830 and ~\$3,150 for an international trip.

Average Budget:
\$1,830

Average Budget:
\$3,150

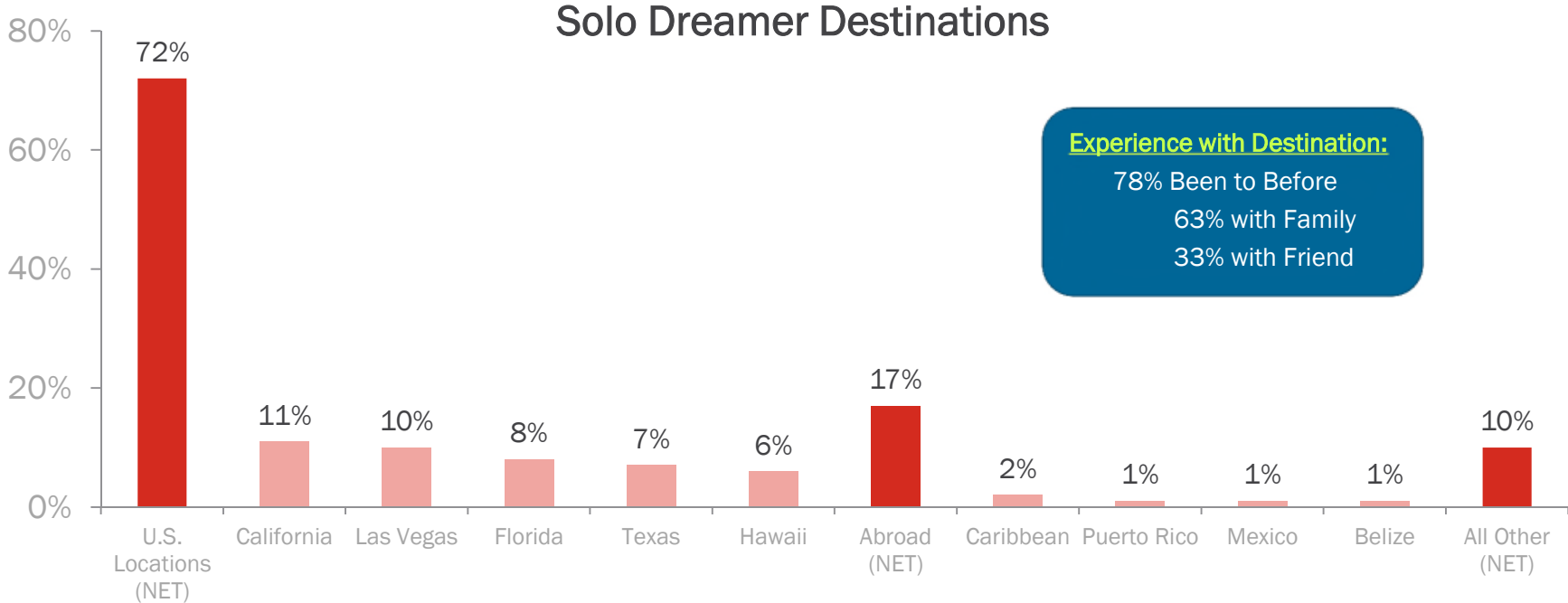
Base: Total Solo Dreamers (n=216)

Q31: Which of the following best describes the type of trip you are planning on taking?

Q32: Approximately how much are you budgeting for this trip?

Potential Destination – Solo Dreamer

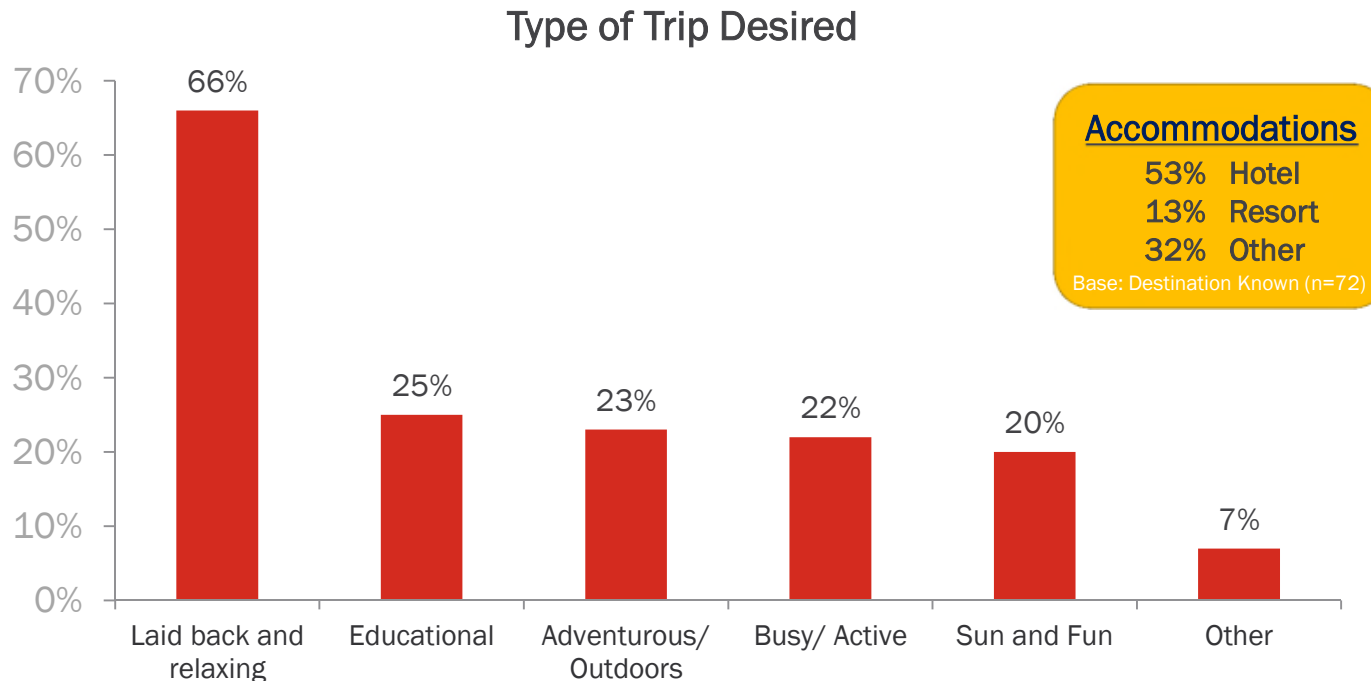
- Like Solo Travelers, Solo Dreamers have chosen destinations they have been to before with California, Las Vegas, and Florida being the top spots domestically.
- Internationally, the Caribbean is cited most often.



Base: Solo Dreamers With Destination Known (n=72)
Q34a: Where are you planning to go on your trip?
Q34c: Have you ever traveled to this location before?

Type of Trip Desired – Solo Dreamer

- The majority of Solo Dreamers are looking for a getaway that is primarily laid back and relaxing.
- That said, there is clearly some desire to overlay laid back with other activities.
 - Specifically, men are more likely than women to be looking for a trip that is Adventurous and Outdoors.

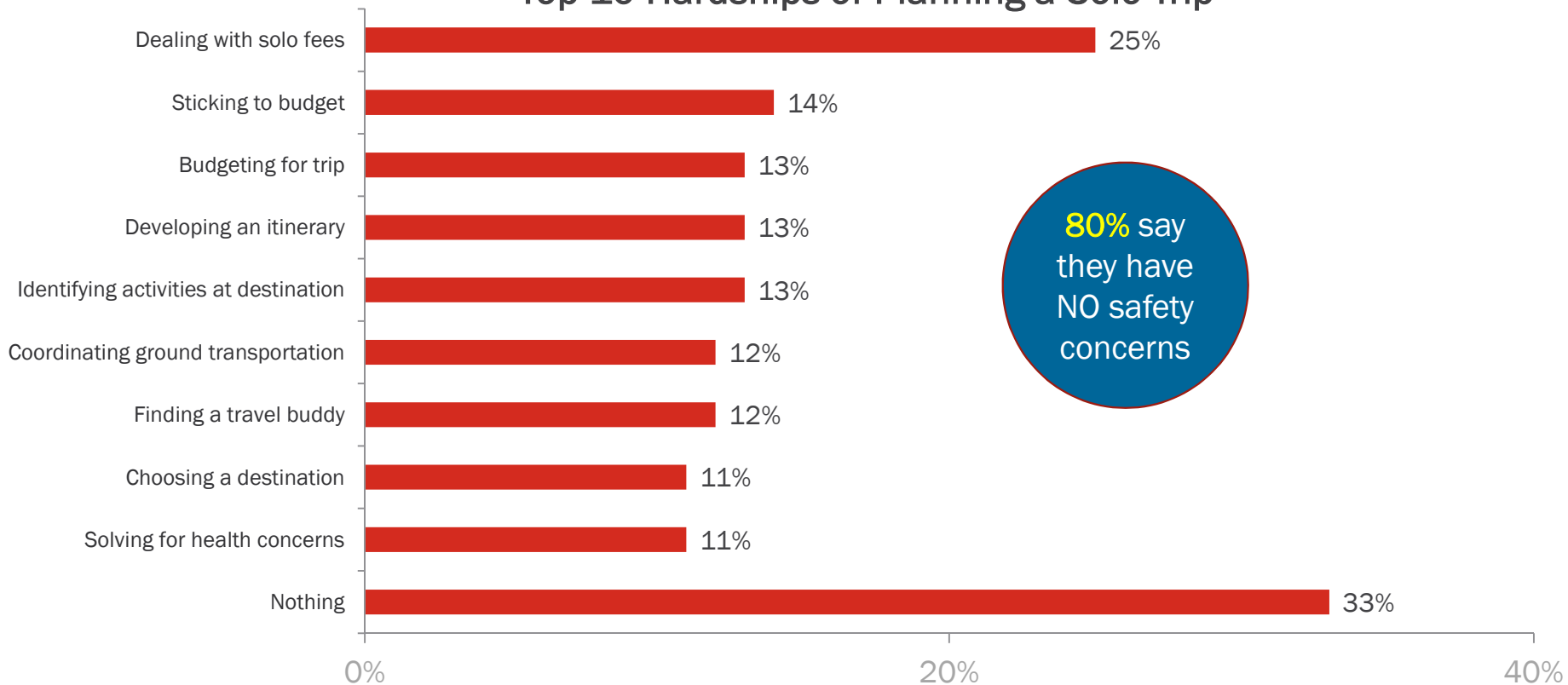


Q37: Overall, what kind of trip do you want it to be? Base: Total Solo Dreamers (n=216)

Travel Planning Hardships – Solo Dreamer

- One-third of Solo Dreamers do not anticipate the travel planning process to be more difficult now that they are traveling solo. Among those who do, dealing with solo fees rise to the top, followed by budgeting concerns.
- The vast majority of Dreamers do not have any safety concerns when traveling solo.

Top 10 Hardships of Planning a Solo Trip



Base: Total Solo Dreamers (n=216)

Q40: Based on your experience planning trips with other people, what part of the travel process, if anything, do you think will be more difficult now that you are traveling solo?

Q41a: Thinking about the trip you are considering, do you have any safety concerns?

APPENDIX

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 identified as either have taken a solo trip in the past or intend to take one in the next 12 months
- The survey was in field from July 9 - 27, 2014
- A total of n=1,202 surveys were completed
- Final counts are detailed in the table to the right

	Completes
Total	1202
Gender	
Male	596
Female	606
Age	
45-59	717
60+	485
Region	
Northeast	215
Midwest	247
South	455
West	285
Ethnicity	
Caucasian/Other	617
African American	207
Hispanic	265
Asian	113
Solo Segment	
Traveler	951
Dreamer	251

Methodology: Caveat

- During data analysis, it was discovered that a small portion of the respondents misunderstood the type of solo travel being researched.
- Instead of taking an entire trip by themselves, n=105 were in the study because they traveled by themselves, but were ultimately connected with friends or family at their destination.
- To ensure the data represents true solo travelers, those identified at Q3b and Q5 who did not take a solo trip have been removed from data, resulting in a total of n=1,097 available for analysis.

Research Team

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