

Travel Research: 2017 Travel Trends

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Table of Contents

2017 Travel Trends

Executive Summary	3
Detailed Findings	
<i>Sizing The Audience</i>	8
<i>Travel Plans</i>	13
<i>Travel Specifics</i>	25
<i>General Travel Behaviors</i>	34
Appendix	46
AARP Research Team	53



Executive Summary

Executive Summary

General Travel Insights

- Travel in 2017 looks very similar to what was anticipated in 2016
 - Most Boomers (99%) will take at least one leisure trip in 2017, with an average of five or more trips expected throughout the year.
 - Most (51%) expect to only travel domestically, but a significant portion are hoping to travel both domestically and internationally (43%).
 - The majority of travel is anticipated in the Spring and Summer of 2017, and to a lesser degree in the Fall, regardless of destination.
 - For Boomers, Bucket Lists trips are the most popular motivation for an international trip, while domestic trips are a combination of Summer vacations, Multi-generational trips, Weekend Getaways, and Holiday travel.
- With all the trips anticipated for 2017, it is important to note that most (~85%) have yet to be booked, meaning Boomers are still in the planning or idea phase.
- Boomers appear confident about making travel arrangements, as 49% report not finding anything particularly difficult to take care of in regards to their travel plans.
 - Among those who noted an issue, budgeting challenges top the list.

Executive Summary

General Travel Insights (Continued)

- Boomers are not avid users of online resources for travel planning and booking, especially compared to younger generations. Among those using online resources, the most popular sites include Trip Advisor, Expedia, Travelocity, Yelp, and Google Maps.
- That said, 41% will book online at the airline/hotel/car website. This is most likely driven by the fact that most Boomers are members of at least one loyalty program. In fact, 82% are currently members of an airline loyalty program.
- More often than not (~70% Always/Mostly), Boomers will book their travel (flight, hotel, car) with their loyalty program provider.
- And although many continue to indicate a desire to travel more in 2017 than they did in 2016, a handful of barriers remain in the way; cost (43%), health (34%), and security concerns (28%) top the list.

Executive Summary

Trip Specifics

- Most Boomers are looking for a laid back and relaxing trip to give them the opportunity to spend quality time with friends and family.
- To do so, Boomers are planning to escape to Mexico, the Caribbean, and/or the British Isles (UK, Ireland) for their upcoming international trips. Their domestic trips, although covering a variety of cities, are most often being planned for a Florida or California destination.
- Regarding authentic experiences, although Boomers would like to eat a meal with locals (50%), or tour with locals (40% among international travelers), they are not as open to staying with locals, domestically or abroad (18%).
- As seen in past waves, among Boomers who are still working, approximately 40% do not anticipate taking all of their vacation days. And when they do vacation, 40% feel it is at least somewhat important to stay connected to work while away, which is why many anticipate spending at least 10% of their vacation time working.

Travel Snapshot By Generation

- A quick review of key leisure travel elements shows important differences by generation.
 - Millennials anticipate taking significantly more trips in 2017 than GenXers or Baby Boomers and are more likely to travel abroad than are GenXers.
 - Boomers are most likely to travel Internationally for a Bucket List trip while Millennials go abroad for Romantic Getaways.
- Domestic travel motivations also differ somewhat by age, Millennials and GenXers are more open to Weekend Getaways than are Boomers.
- Baby Boomers use online resources for planning and booking trips to a lesser degree than do their younger counterparts.
- Millennials and GenXers are more likely than Baby Boomers to set a budget for their trips and are more likely to have been impacted by the cost of rising airfares.

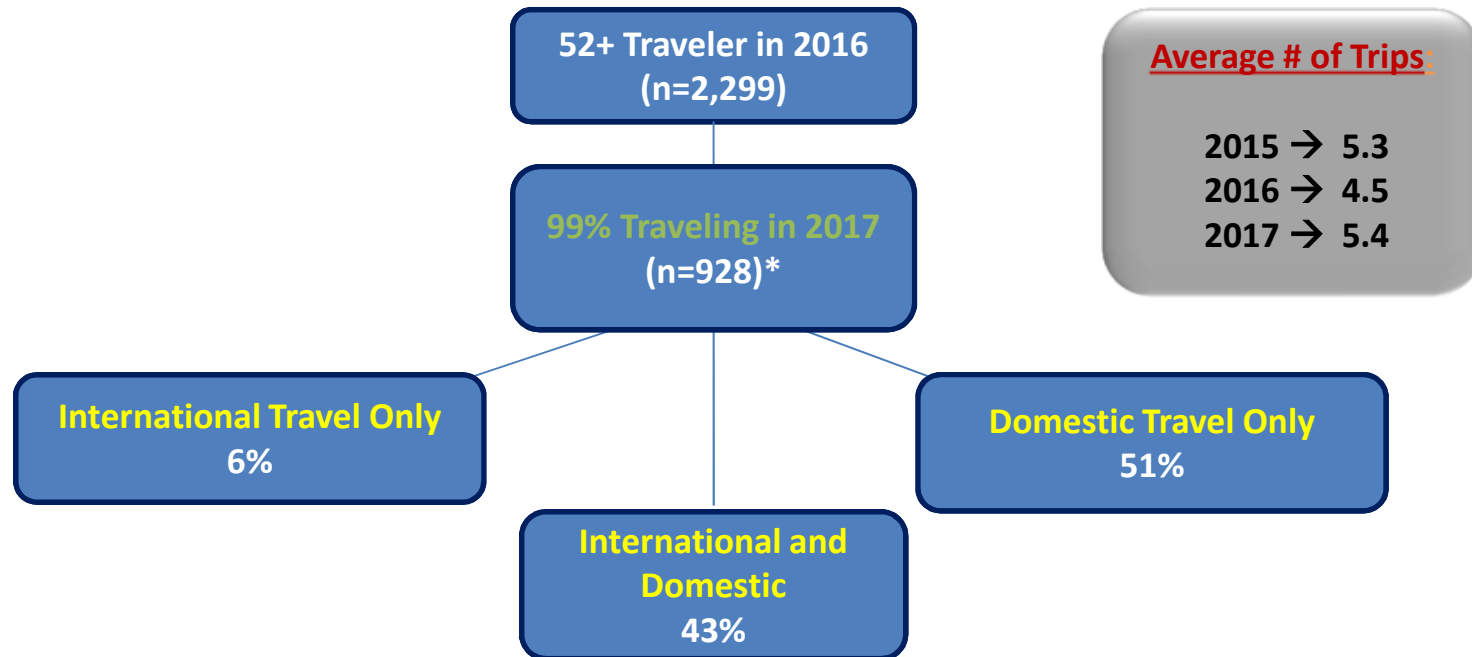
	Millennials (a)	Generation X (b)	Baby Boomers (c)
Destination	Base: (382)	(410)	(928)
International	7% b	3%	6%
Domestic	42%	51% a	51% a
Both	51% c	46%	43%
Number of Trips (Average)			
International	1.7	1.6	1.7
Domestic	3.2	3.3	3.7
Total	6.5 bc	5.3	5.5
Top 5 Trip Types: International	Base: (223)	(203)	(452)
Bucket List trip	19%	20%	34% ab
Summer vacation	29% c	31% c	20%
Multi-gen trip	19%	24%	18%
Romantic getaway	31% bc	17%	13%
Celebration vacation	16%	16%	16%
Top 5 Trip Types: Domestic	Base: (354)	(396)	(878)
Summer vacation	27%	33%	29%
Multi-generational trip	32%	29%	28%
Weekend getaway	35% c	33% c	25%
Holiday travel	27% c	21%	22%
Romantic getaway	20% c	18% c	13%
Top Planning Resources (% Use)	Base: (233)	(242)	(562)
Hotel/Air/Car websites	77% c	74%	69%
Review websites	75% c	69% c	53%
Travel booking websites	70% c	70% c	50%
Mobile apps	56% c	54% c	30%
Other travel sites	41%	45%	39%
Groupon/Living Social	46% bc	37% c	16%
Budget Use	Base: (233)	(242)	(562)
% Yes	62% c	54% c	40%
Impacted by Higher Airfare	Base: (294)	(529)	(888)
% Caused Change in Plans	54% c	43% c	31%

Letters denote a significant difference between generations

Detailed Findings: Sizing The Audience

2017 Travel Audience

- Consistent with past waves, practically all Baby Boomers anticipate one or more leisure trips in 2017 (January-December), with more than 40% looking to travel both domestically and internationally.



S11: And finally, how many personal trips do you anticipate taking next year, in the calendar year of 2017? Base: Screener, Baby Boomers (52+) Travelers (n=2,299)

Q1a: How many of these trips will be international and how many will be domestic? Base: 2017 Baby Boomer Travelers (n=928)

S9/S10: Calculates Total Trips Taken in 2016 Base: 2017 Baby Boomer Travelers (n=928)

* Qualified for survey quotas

Audience Profiles

- With the exception of ethnicity, Baby Boomers who anticipate domestic travel only vs. world travelers do not look distinctly different demographically.
 - Hispanics and Asians do indicate a higher likelihood to travel internationally than do Caucasians.
- Also, as seen in the past, there is indication that the single Baby Boomer is more apt to travel abroad than to limit themselves to domestic travel.

Audience profiles are very similar 2015, 2016, 2017

2017 Baby Boomer Traveler Audience Profiles			
	International Traveler Only	Domestic Traveler Only	World Traveler
Base:	50	476	402
Gender	(a)	(b)	(c)
Male	43%	45%	50%
Female	57%	55%	50%
Age			
51-59	42%	35%	30%
60-69	24%	33%	36%
70+	34%	32%	34%
Ethnicity			
Caucasian/Other	61%	81% ac	72%
African American	10%	11%	10%
Hispanic	15% b	7%	12% b
Asian American	14% b	1%	6% b
Income			
Average	\$91K	\$86K	\$98K b
Marital Status			
Single/never married	16% c	8%	7%
Married/living together	64%	70%	72%
Divorced/separated	20%	13%	13%
Widow	--	8%	8%

Note: World Traveler are those who are planning to travel domestically and internationally
Letters denote a significant difference between travel segments

Top Motivators for Travel

- Despite a slightly different order, the top travel motivators for Boomers do not change year over year.
 - Millennials are the least likely generation to be motivated by the need to relax and rejuvenate (28% vs 47% GenX and 38% Boomers), as they are more apt to look at vacation as an opportunity for adventure or to go somewhere new.

2016 Trip Motivators:

1. Spend time with family/friends (54%)
2. Relax & rejuvenate (42%)
3. Get away from normal everyday life (39%)

1

57% *To spend time with family and friends*

2

39% *To get away from normal everyday life*

3

38% *To relax and rejuvenate*

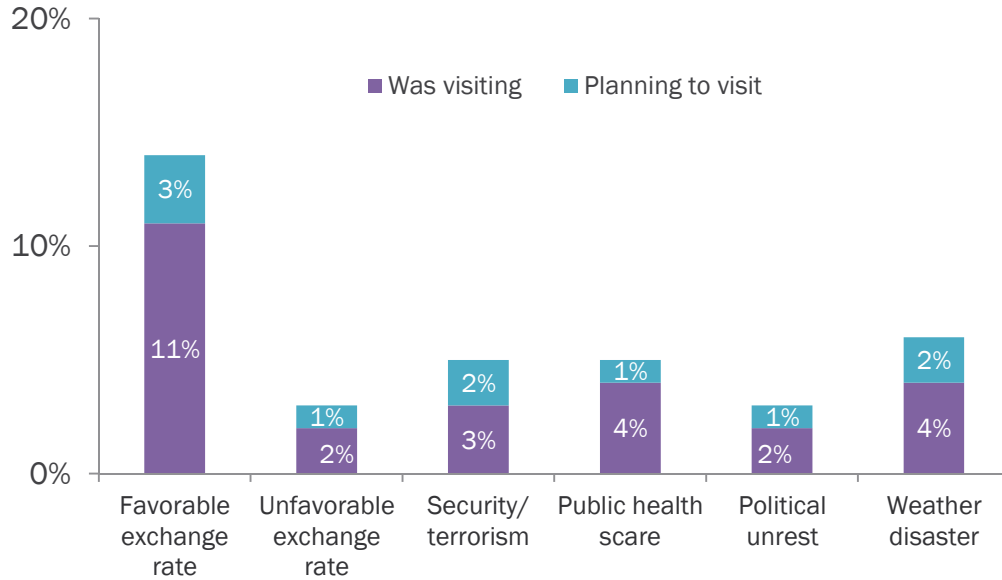
Base: Baby Boomers Evaluating a Trip (n=562)

Q9b: Please select your top three motivators for choosing the destination for this trip.

Barriers to Travel

- Very few travelers encounter major issues with leisure travel plans. In fact, when negative situations did arise, only a small percentage (19%) of travelers cancelled their trip or changed destinations.

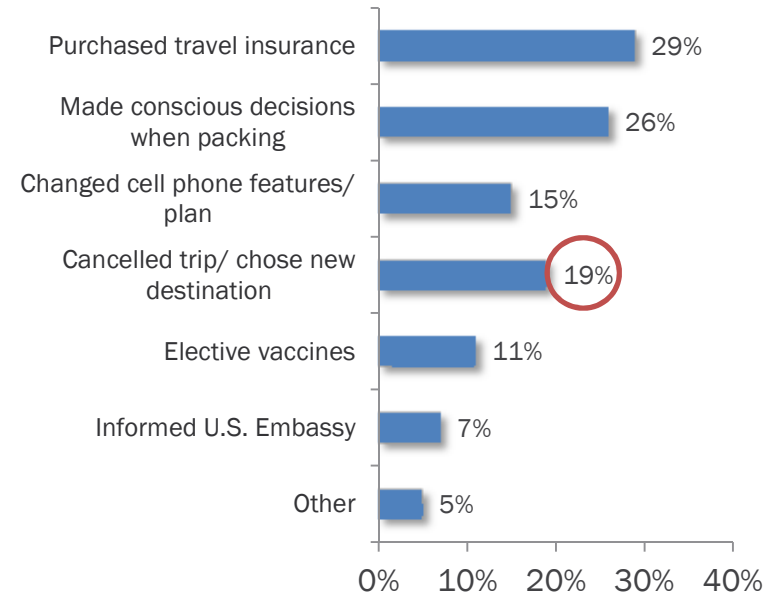
Travel Events



Base: 2017 Baby Boomer Travelers (n=928)

Q23a. Which of the following, if any, did you experience in regards to a destination you were planning on visiting or a destination you were visiting at the time?

Actions Taken When Negative Event Occurred



Base: 2017 Baby Boomer Travelers who experienced a negative event (n=115)

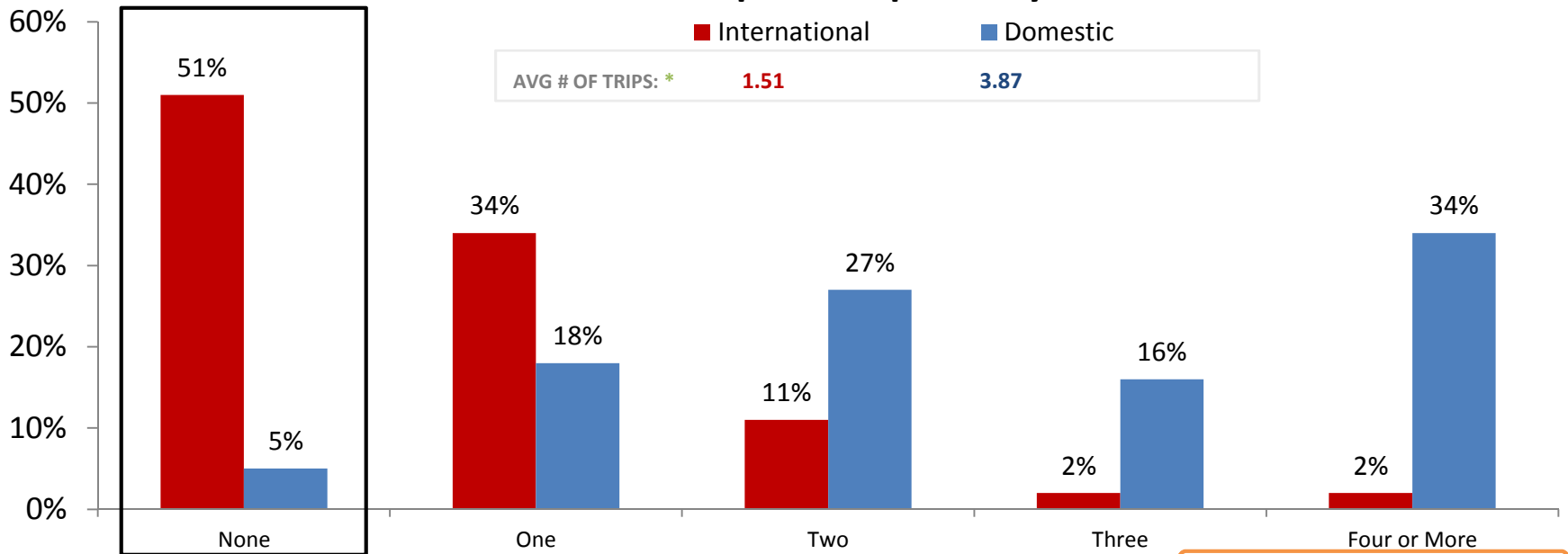
Q23b. Which of the following measures did you take as a response to the current events at your selected destination?

Detailed Findings: Travel Plans

Number of Trips Anticipated

- Domestic travel is by far the most popular among Boomers with 95% planning such a trip in 2017.
- On average, Boomers will take a total of 5 trips next year.
 - No dramatic differences exist between generations when it comes to number of anticipated trips, however, significantly more Millennials plan on international travel (58%) compared to GenX and Boomers (49% each).

Number of Trips Anticipated By Destination



No significant difference 2016 vs. 2017

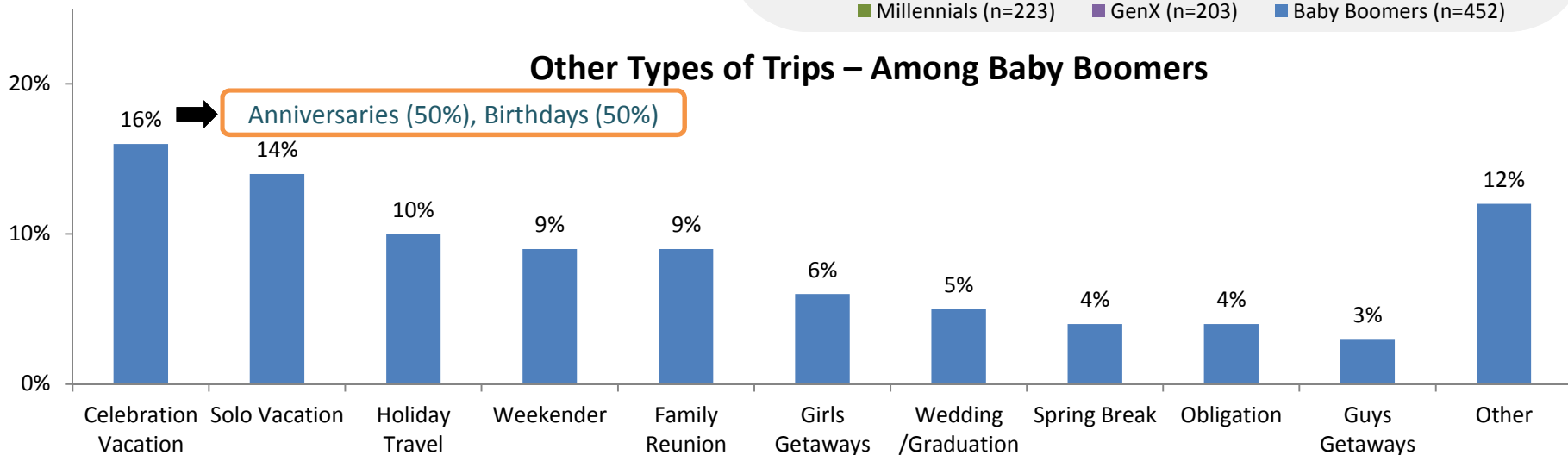
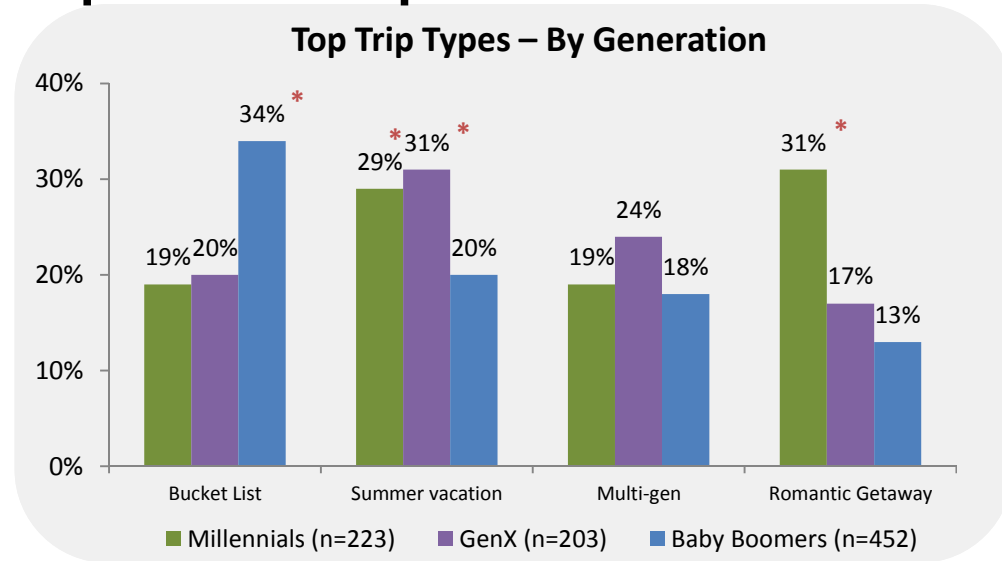
Base: 2017 Baby Boomer Travelers (n=928)

Q1a: A moment ago you mentioned you anticipate taking [number] personal trips in 2017. How many of these will be an international trip and how many will be a domestic trip?

* Among those taking one or more trips

Types of International Trips Anticipated

- The Bucket List remains the most common International trip type among Baby Boomers.
- Compared to anticipated travel in 2016, the Multi-Gen trip in 2017 has lost some of its appeal – expectation is down in all age groups (2016: 26% M vs. 34% GX vs. 20% BB).



Base: Baby Boomers Planning on 1 or More International Trips in 2017 (n=452)

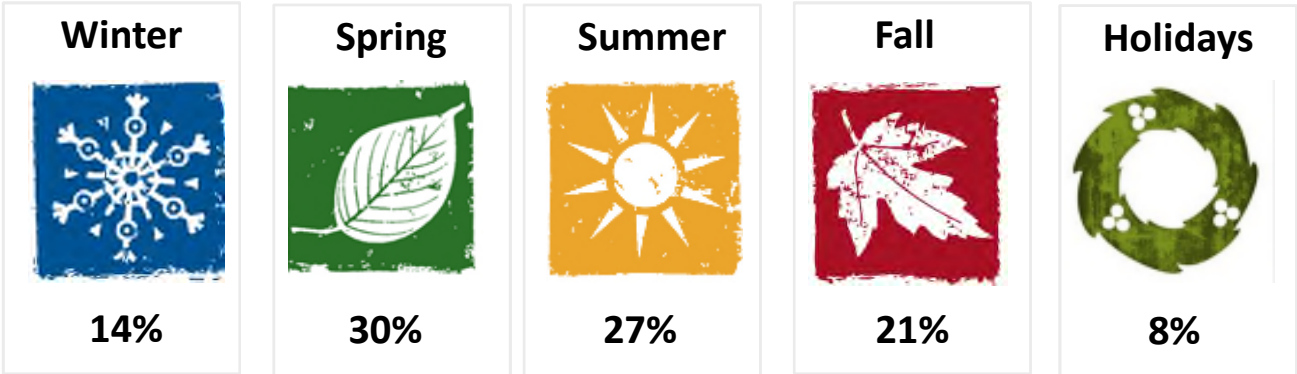
Q2: For the international trips you plan on taking next year, please read the list of trip types below and select your **primary motivation** for EACH trip.

Q2c: Which of the following will you be celebrating on your upcoming trip(s)? Base: Baby Boomers Planning a Celebration Vacation in 2017 (n=73)

* Denotes a significant difference between generations

Time of International Travel

- Consistent with last year, Spring and Summer are the most popular times for Boomers to travel Internationally.

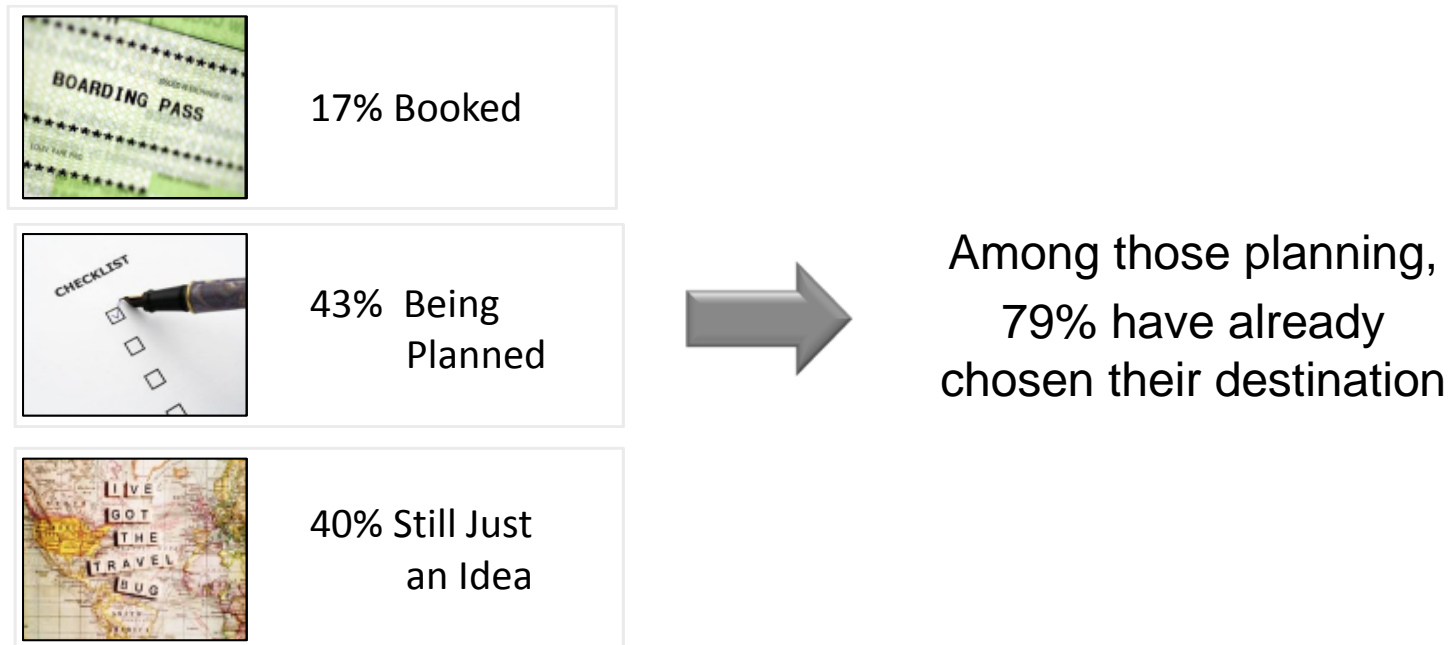


Base: Baby Boomer International Trips anticipated for 2017 (n=810)
Q2b: Thinking about your upcoming international trips listed below, please indicate the time of year, or season you plan to travel.

No significant difference 2016 vs. 2017

Commitment to International Travel

- By the Fall of 2016, only 17% of International Boomer trips are booked for 2017.
 - Spring Break is the trip most likely to already be fully booked
 - On the flip side, Weekend Getaways, Summer Vacations, and Romantic Travel are most likely to still just be an idea
- Of those active in the planning phase, the majority have chosen destination.



Base: Baby Boomer International Trips anticipated for 2017 (n=810)

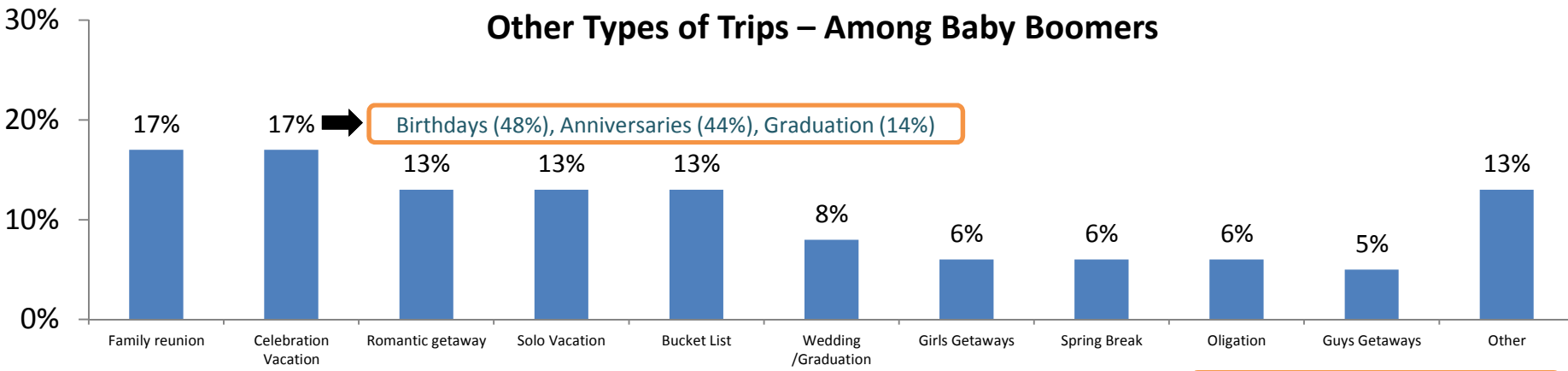
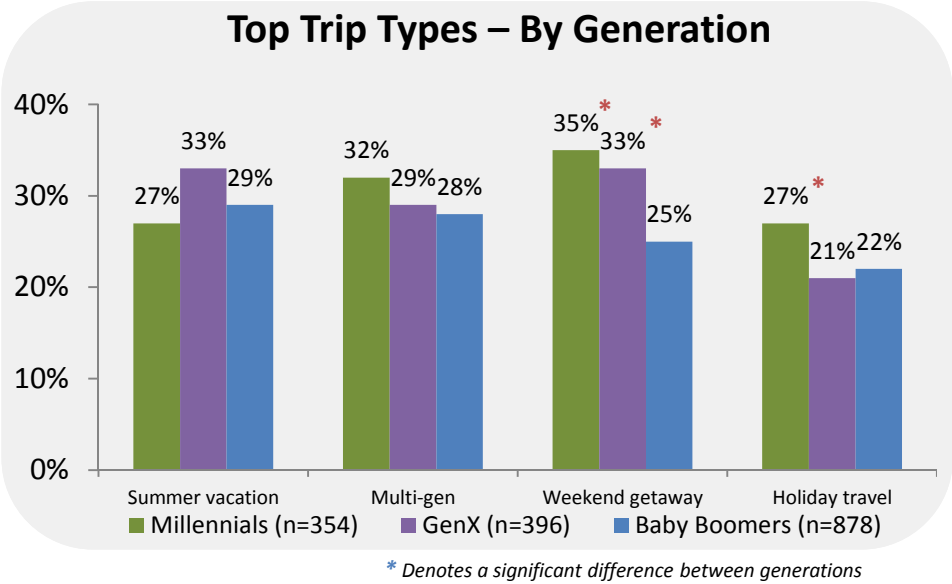
Q3a: Of the international trips you anticipate taking next year, please indicate if it is booked, being planned, or just an idea.

Q3b: For those international trips that are still in the planning phase, have you selected a final destination? Base: Baby Boomer International Trips In Planning Phase for 2017 (n=487)

No significant difference 2016 vs. 2017

Types of Domestic Trips Anticipated

- Compared to 2016 Domestic travel, GenXers appear less zealous about Summer and Multi-Gen trips, making them more equally anticipated by all ages next year.
- Weekend Getaways continue to be the most popular among Millennials and GenXers.

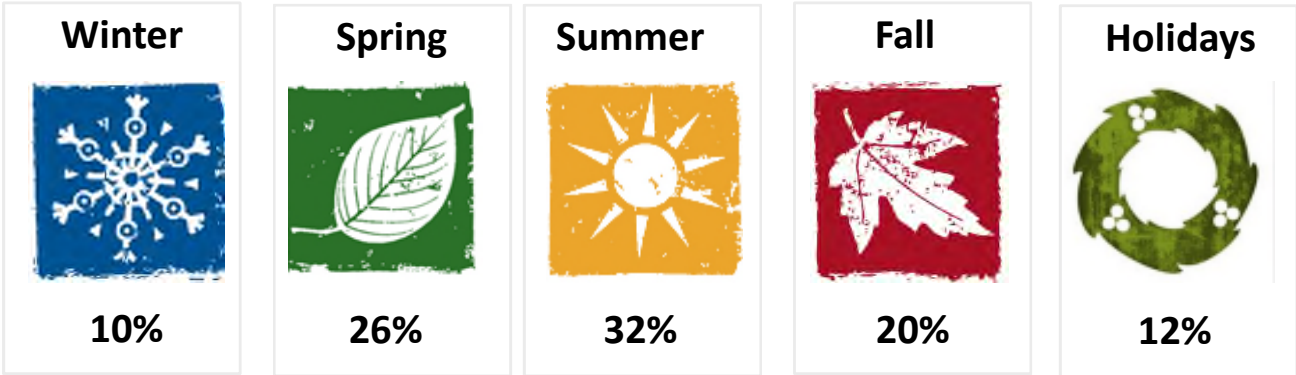


Base: Baby Boomers Planning on 1 or More Domestic Trips in 2017 (n=878)
 Q4: Of the domestic trips you plan on taking next year, please read the list of trip types below and select your **primary motivation** for EACH trip.
 Q4c: Which of the following will you be celebrating on your upcoming trip(s)? Base: Baby Boomers Planning a Celebration Vacation in 2017 (n=145)

No significant difference 2016 vs. 2017

Time of Domestic Travel

- As with International travel and consistent with last year, Spring and Summer are the top months to travel Domestically.

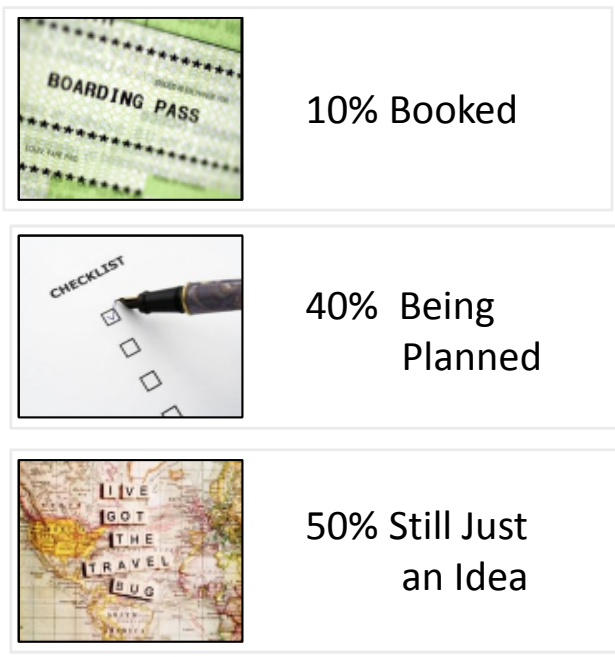


Base: Baby Boomer Domestic Trips anticipated for 2017 (n=1981)
Q4b: Thinking about your domestic trips listed below, please indicate the time of year, or season you plan to travel.

No significant difference 2016 vs. 2017

Commitment to Domestic Travel

- While 17% of International trips are booked by this time, only 10% of Domestic trips are.
 - With Spring Break, Family Reunions, and Weddings/Graduations being the ones most likely booked.
- As in 2016, half of Boomer travelers are still just thinking about Domestic travel ideas with no planning taking place just yet.
 - Those most likely to still be just an idea include Girls Getaways, Romantic Travel, Weekend Getaways, and Summer Vacations.



Among those planning, 80% have already chosen their destination

No significant difference 2016 vs. 2017

Q5a: For the domestic trips you anticipate taking next year, please indicate if it is booked, being planned, or just an idea. Base: Baby Boomer Domestic Trips anticipated for 2017 (n=1981)
Q5b: For those domestic trips that are still in the planning phase, have you selected a final destination? Base: Baby Boomer Domestic Trips In Planning Phase for 2017 (n=982)

Planning Resources

Frequently Used

	Hotel/ Air/ Car Sites	Review Sites	Travel Booking Sites*
Plan/Research	38%	38%	37%
Book	41%	6%	14%
Restaurant selection/ reservations	4%	13%	4%
Activity selection/ reservations	5%	9%	4%
Weather	3%	6%	4%
Directions	2%	5%	2%
Will not use	31%	47%	50%

* Expedia, Travelocity, Orbitz, etc.

- Slightly over one-third of Boomers will use online resources to help them research and plan a trip for 2017; indicating an equal dependency on brand specific sites, review sites, and aggregator sites.
 - Those researching international trips are significantly more likely to leverage online resources for most surveyed resources than those traveling domestically.
- However, when booking, Boomers continue to rely specifically on just the hotel/airline/car websites.
- As seen in the past, Millennials and GenXers are more likely to engage with online travel resources than are Boomers. (See appendix)

No significant difference 2016 vs. 2017

Base: Baby Boomers Evaluating a Trip (n=562)
 Q11a: Reviewing the list of possible online resources below, please indicate in which ways you may have, or plan to, use each one.

Planning Resources – continued

- Boomers are still not avid users of the variety of resources available to assist in travel planning, especially compared to both GenXers and Millennials. (See appendix)
- As seen for 2016 travel, Boomers will use Mobile Apps from some research and planning, along with access to weather or directions, but less than 10% will take advantage of any of the other resources.

Not Frequently Used

	Mobile Apps	Open Table	Groupon/Living Social	Social Media	Blogs
Plan/Research	12%	5%	7%	8%	8%
Book	5%	3%	1%	1%	1%
Restaurant selection/reservations	8%	9%	6%	4%	4%
Activity selection/reservations	6%	1%	4%	3%	2%
Weather	11%	1%	1%	3%	2%
Directions	11%	<1%	<1%	2%	<1%
Will not use	70%	84%	85%	85%	87%

Base: Baby Boomers Evaluating a Trip (n=562)

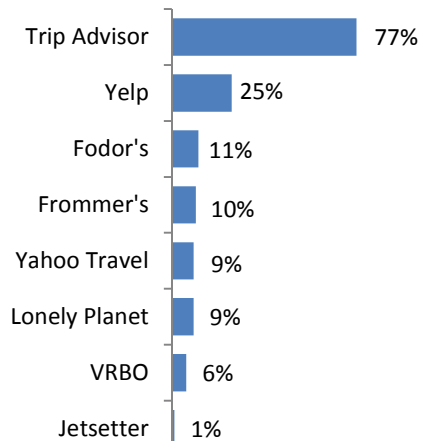
Q11a: Reviewing the list of possible online resources below, please indicate in which ways you may have, or plan to, use each one.

Planning Resources – Most Used

No significant differences in 2016 vs 2017.
Some new sites added in 2017.

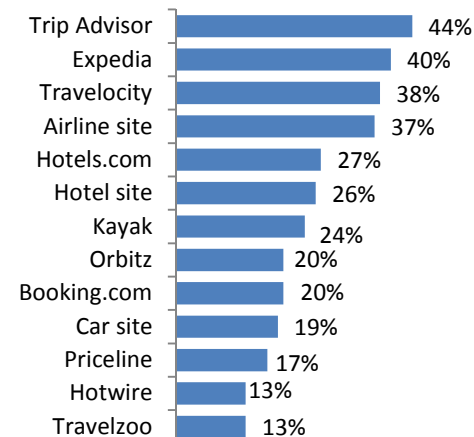
- Trip Advisor is a consistent top resource for reviews and booking.
 - Millennials (48%) also favor Yelp for reviews more so than GenXers (26%) and Boomers (25%).
 - Boomers (37%) will utilize specific airline sites for booking more often than Millennials (22%) or GenXers (25%).
- Google Maps is the most popular mobile app with even higher expected use in 2017.
- While Facebook is definitely the social media leader, 43% of Millennials and 22% of GenXers also turn to Instagram for trip planning/inspiration, more so than Boomers at only 4%.

Review Sites



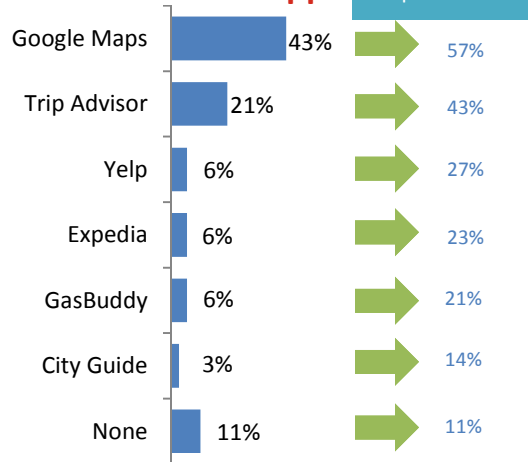
Base: Baby Boomers Using a Review Site (n=296)

Booking Sites



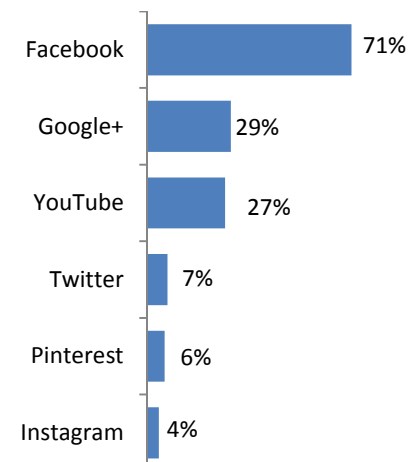
Base: Baby Boomers Using a Booking Site (n=283)

Mobile Apps



Base: Baby Boomers Have Used/Expecting to Use Mobile Apps (n=169)

Social Media



Base: Baby Boomers Using Social Media (n=87)

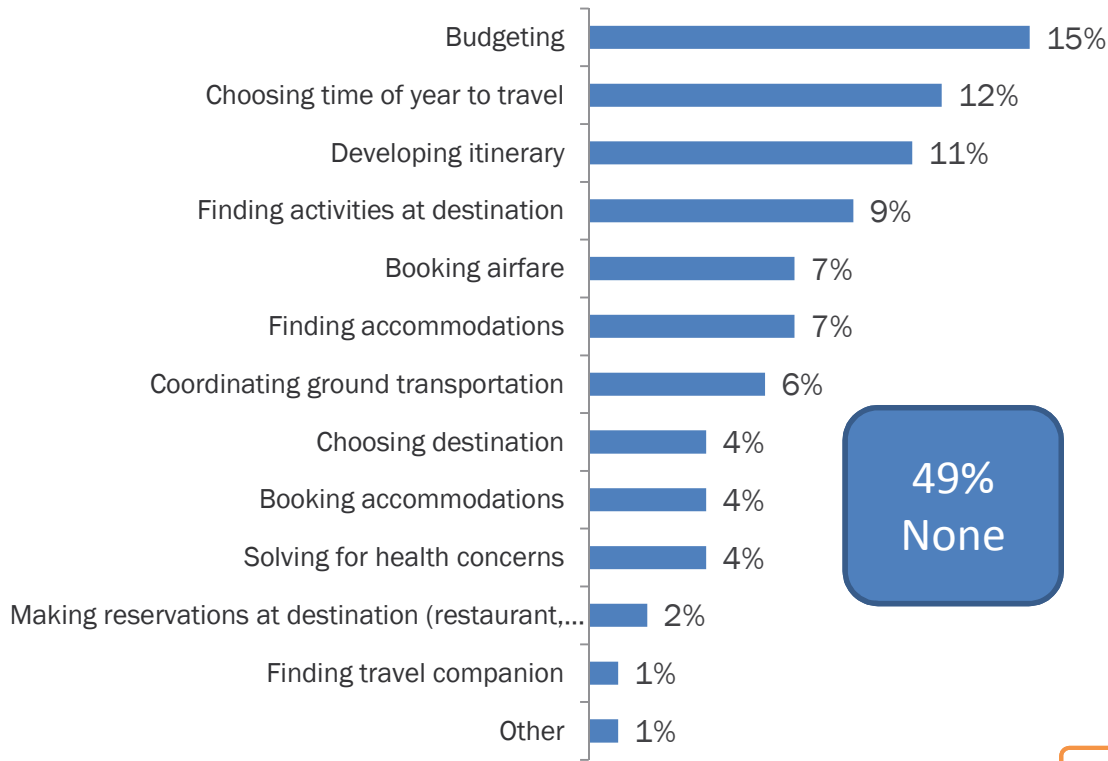
Q11b_1,2,4: Which specific [Q11b response] did you use, or will you use, to help with planning and/or getting ideas and inspiration for your trip?

Q11b_5: Which specific mobile travel apps do you plan on using on your upcoming trip and which one have you used most often on past trips?
10%+ reported

Difficulties While Planning

- Although almost half of Boomers (49%) report no challenges while trying to plan an upcoming trip, of those who do, budgeting tops the list. With budgeting being a bigger issue for Millennials (27%) and GenXers (21%) compared to Boomers (15%).

Trip Planning Challenges



Base: Baby Boomers Evaluating a Trip (n=562)

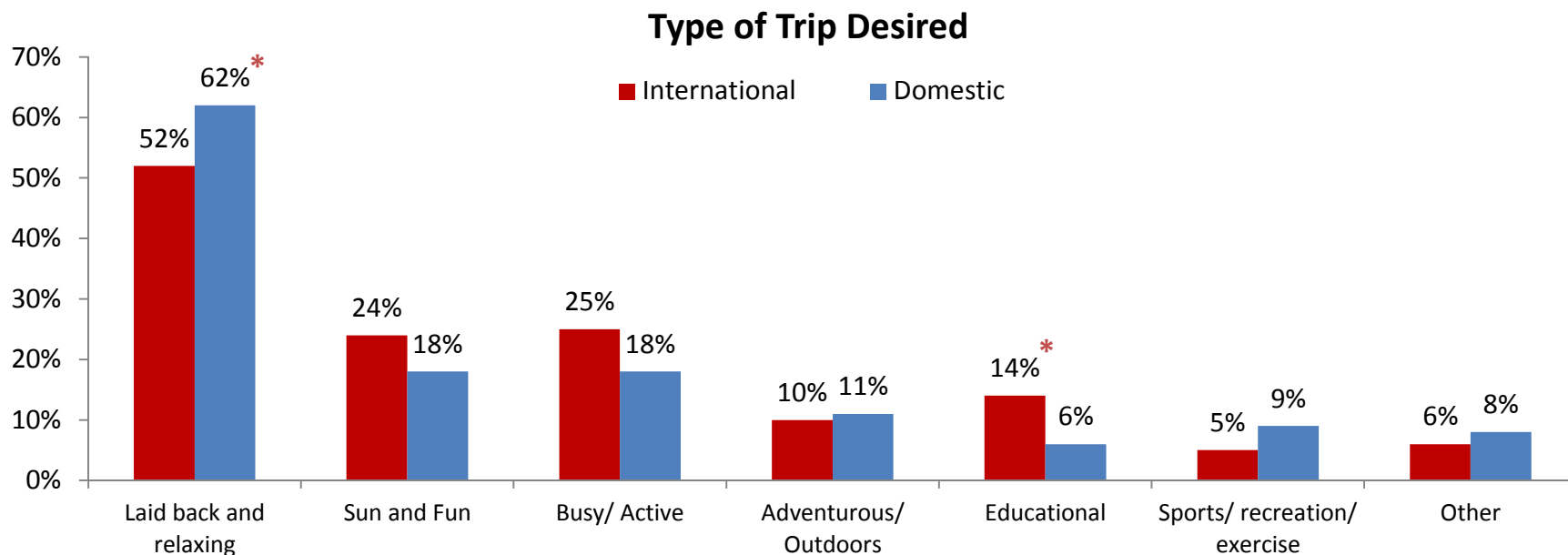
Q13: Looking back on the planning of this trip that you plan on taking in 2017, what if anything, did you find difficult to take care of?

New Question 2017 Travel Trends

Detailed Findings: Travel Specifics

Type of Trip Desired

- A Laid Back & Relaxing vacation is the most desired type of trip – especially when traveling to a domestic destination.
- Millennials and GenXers also seek active trips like Sun & Fun (28% M, 34% GX) and Adventurous/Outdoors (23% M, 22% GX) more so than Boomers.



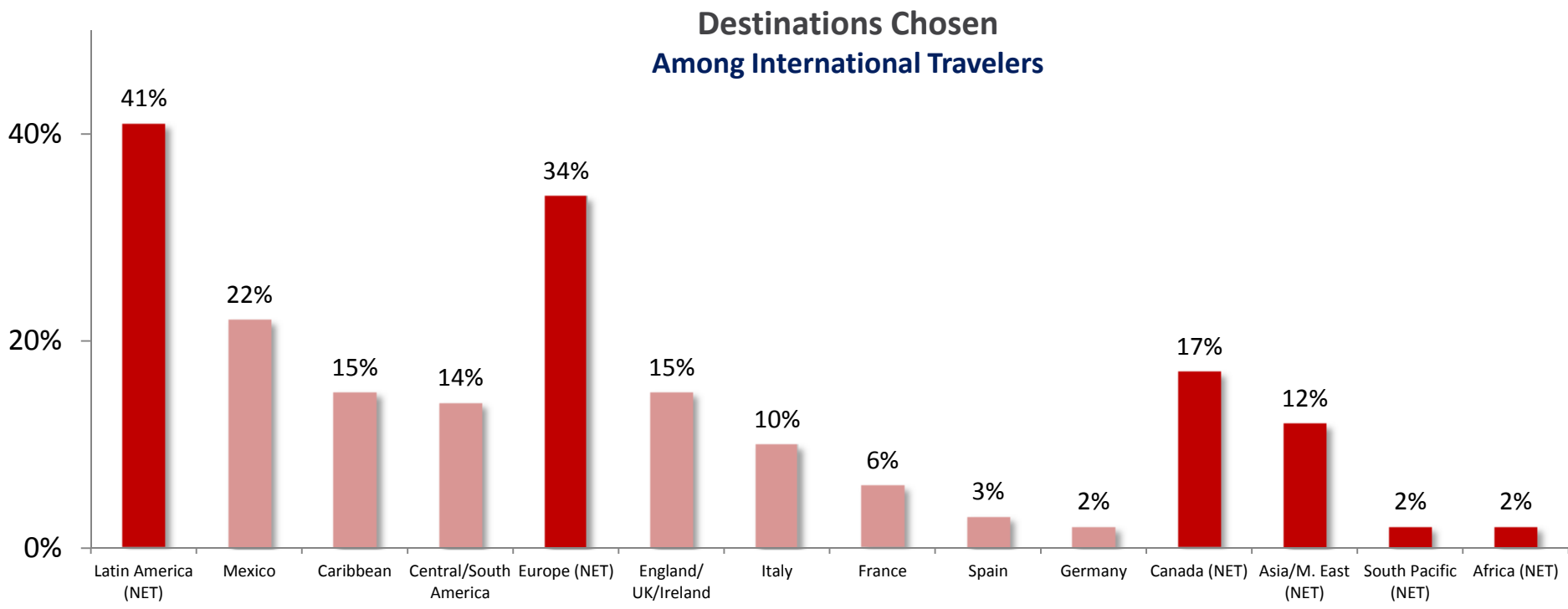
Base: Baby Boomers Evaluating a Trip (International: n=178; Domestic: n=385)

Q9a: Which of the following best describes the type of trip you want it to be? * Denotes a significant difference between travel segments

No significant differences in 2016 vs 2017.

Selected Destinations – International

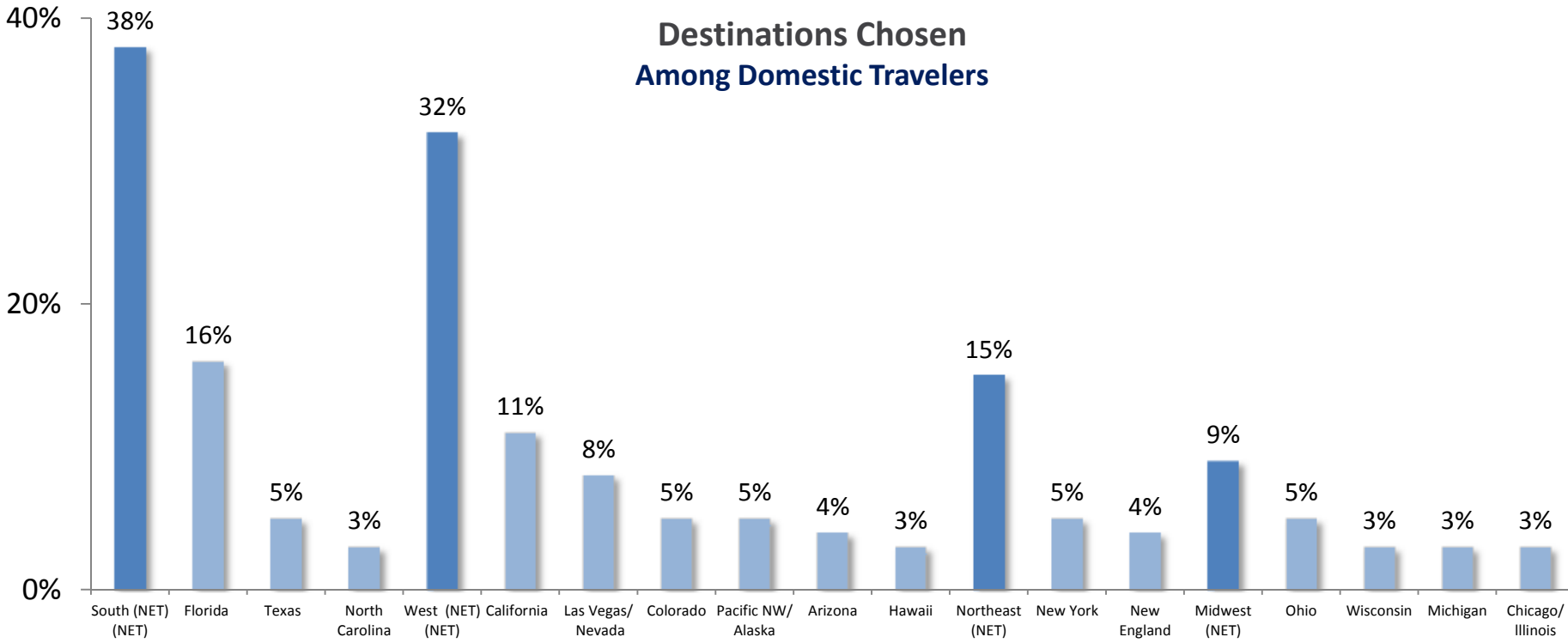
- Latin America emerges as the most popular International destination for Boomers.
- While Europe is still a desired destination among one-third of Boomers, it has dropped significantly from 44% in 2016.



Base: Baby Boomers Evaluating an International Trip (n=298 coded responses)
Q3c: For the trips listed below, please tell us where you have chosen to go.

Selected Destinations - Domestic

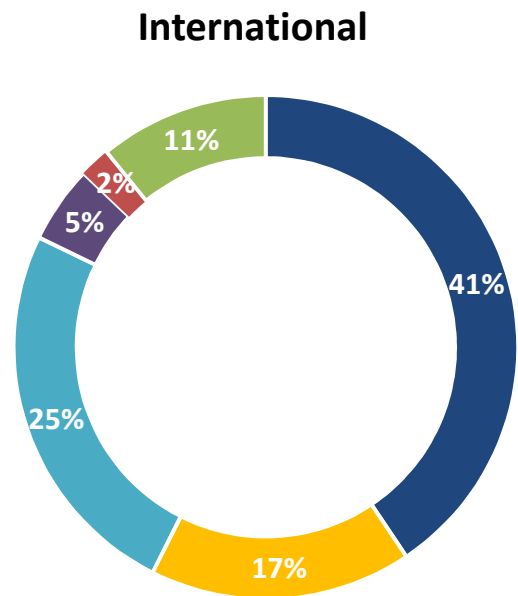
- The Southern and Western United States continue to be the most popular Domestic destinations for Boomers, with Florida and California cited most often.



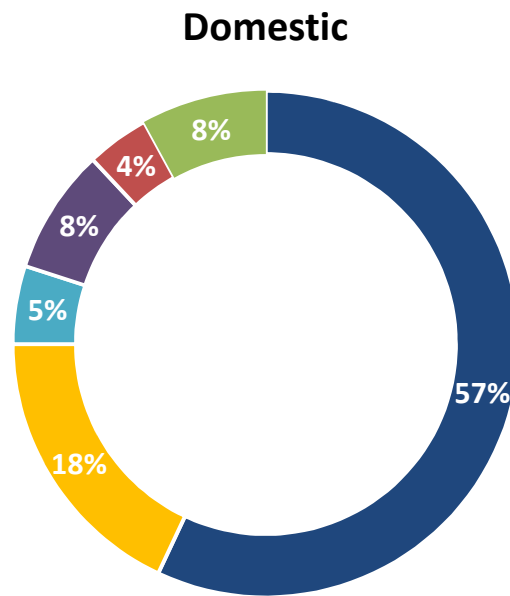
No significant difference 2016 vs. 2017

Base: Baby Boomers Evaluating a Domestic Trip (n=759 coded responses)
 Q5c: For the trips listed below, please tell us where you have chosen to go.

Type of Destination Location



Base: Baby Boomers Evaluating an International Trip (n=178)



Base: Baby Boomers Evaluating a Domestic Trip (n=385)

■ City/Town ■ Beach ■ On the water* ■ Mountains ■ Parks/Camp ■ Other

* On the water includes cruises, lakes, rivers

- Cities and Towns remain a top destination location for both domestic and international travel.
- Cruises continue to be a popular way to visit international destinations.

Q8: Which of the following best describes the type of location you have chosen for this trip?

* Denotes a significant difference between travel segments

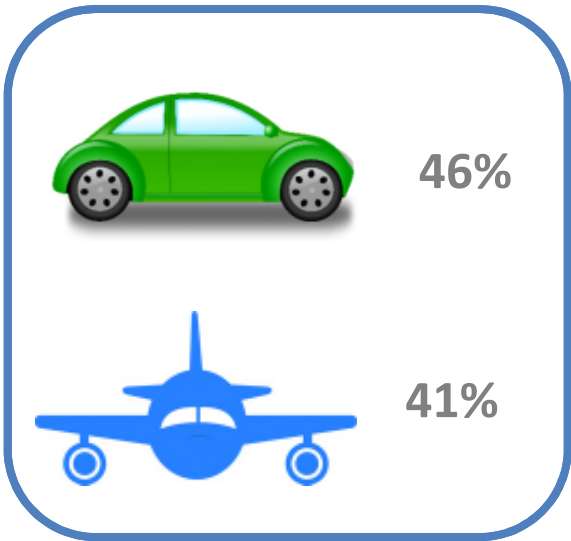
No significant difference 2015 vs. 2016

Transportation & Accommodations

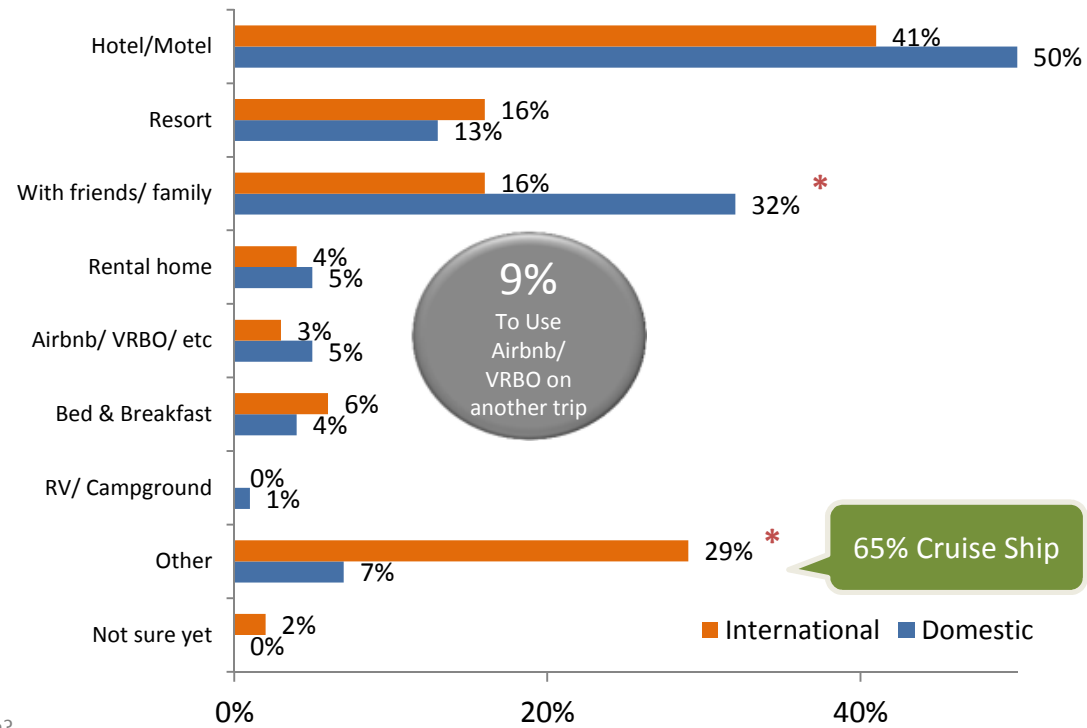
- A shift from 2016 (47% air, 43% personal vehicle), personal vehicles have a slight edge over air travel for primary mode of transportation for domestic trips in 2017.

- Hotels remain the most popular accommodation style regardless of destination.

Primary Mode of Transportation - Domestic



Accommodations



Domestic Hotel accommodations higher in 2017 compared to 2016 (41%).

Base: Baby Boomers Evaluating an Trip (International: n=178; Domestic: n=385)
 Q10a: What is the primary mode of transportation you will use to get to your destination?
 Q10b: Which of the following best describes the type of accommodations you will be staying at on this trip?
 Q10d: Do you plan to stay in an Airbnb/VRBO on any other trip you plan on taking in 2017?

* Denotes a significant difference between travel segments

Authentic Experiences

- Half of all Boomers are intrigued by the idea of sharing a meal with a local at their destination in order to have an authentic experience.
- Spending more intimate time (on a tour, in their house) is less of an appeal.
 - GenXers are more likely to take a tour with locals compared to other generations (34% vs. 21% Millennials and 23% Boomers).



Eat a Meal with Locals
50%



Tour with Locals
23%



Stay with Locals
18%

None: 34%

Base: Baby Boomers Evaluating a Trip (n=562)

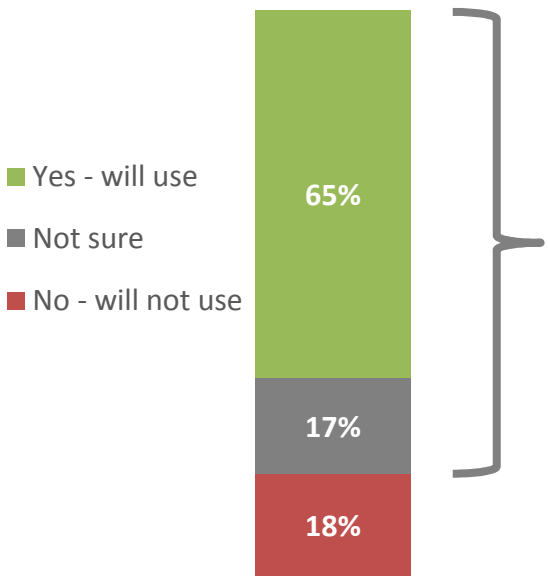
Q9c: While on your trip, which of the following “authentic” experiences do you have interest in participating in?

New Question 2017 Travel Trends

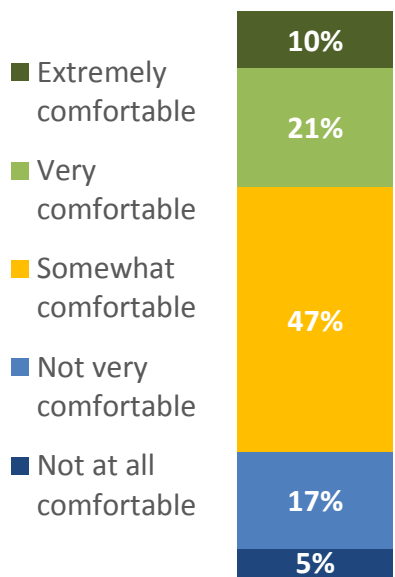
Use & Safety of Public Wi-Fi

- The majority (82%) anticipate using public Wi-Fi while traveling. That said, they are not overwhelmingly comfortable with their perception of the security of a public connection.

Public Wi-Fi Expected Use



Level of Comfort



Base: Baby Boomers Evaluating a Trip (n=562)

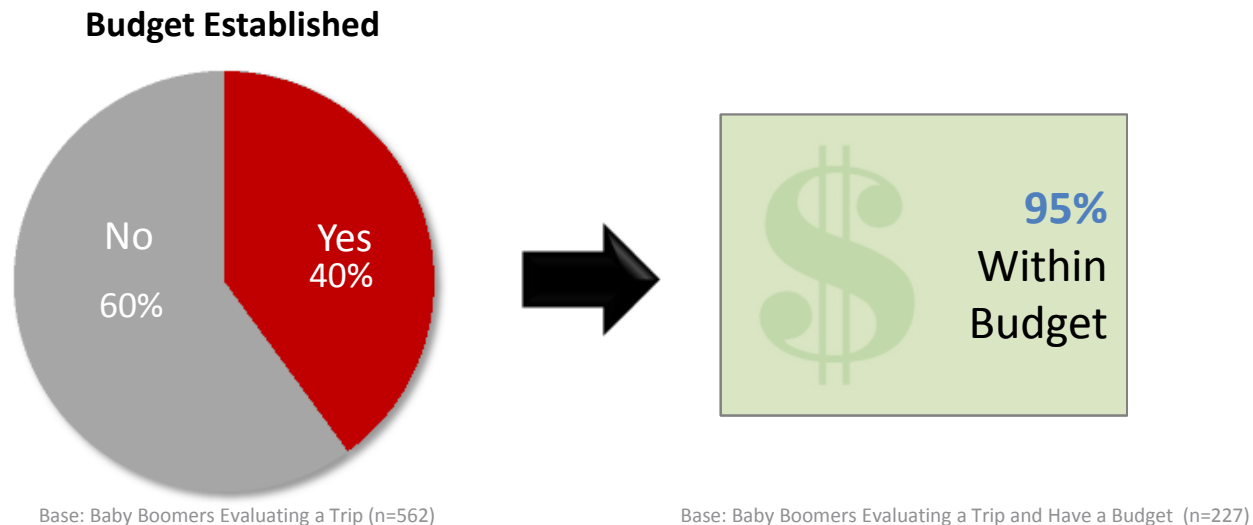
Q12c: At any point during your trip, do you anticipate using a free, public Wi-Fi connection?

Base: Baby Boomers Not Sure or Expecting to Use Free Wi-Fi (n=460)

Q12d: What is your comfort level with regards to the security of a free, public Wi-Fi connection?

Adherence to a Budget

- Setting a trip budget does not seem to be a priority among Boomers. However, the younger generations are more conscious of how their vacation dollars are spent (62% Millennials and 54% GenXers set a budget).
- Regardless of age, however, when a budget is set, the majority stay within it (94% Millennials, 89% GenX, 95% Boomers).



Q14a: Before making all the arrangements for this trip, did you have a set budget you were trying to stay within?

Q14b: Based on your travel plans thus far, are you able to find travel arrangements that allow you to stay within your budget?

No significant difference 2016 vs. 2017

Detailed Findings: General Travel Behaviors

Travel Loyalty Programs

- Most Boomers are a member of 1 or more Airline and/or Hotel loyalty programs. Booking travel through loyalty programs is more common than not (68%+ always/mostly across all 3 types).
 - Boomers are most likely to be enrolled in an Airline program (82%) compared to Millennials (71%) and GenXers (74%), but all ages book through the program at the same frequency. Millennials are least likely to enroll in a hotel loyalty program than are older generations (62% vs 77% GenX and 73% Boomer).



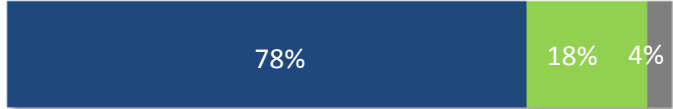
Program Membership

82%

Avg # Enrolled In

2.3

Frequency of Booking Through Program



Base: Enrolled in Airline Program (n=756)

■ Always/Mostly ■ Sometimes ■ Rarely/Never



73%

2.3



Base: Enrolled in Hotel Program (n=681)



40%

1.7



Base: Enrolled in Car Program (n=375)

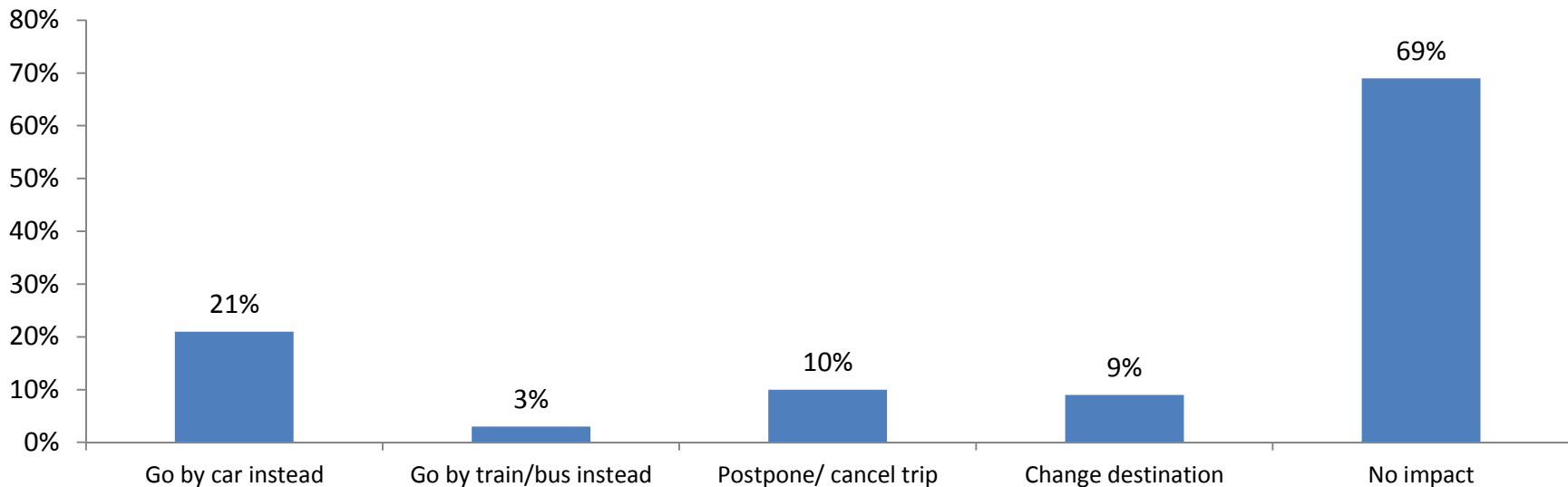
Base: 2017 Baby Boomer Travelers (n=928) Q5h_1: Please indicate the types of travel related loyalty programs you are currently a member of.

Q5i: How often do you book with your travel loyalty program provider versus other options in the marketplace when making leisure travel arrangements?

Impact of Increased Airfares

- The majority of Baby Boomers (69%) do not appear to be deterred by high air fares.
- Among those who are, rather than letting an increase in airfare prevent them from traveling, some will choose to make it a road trip instead.

Adjustments Made Due to Air Travel Prices



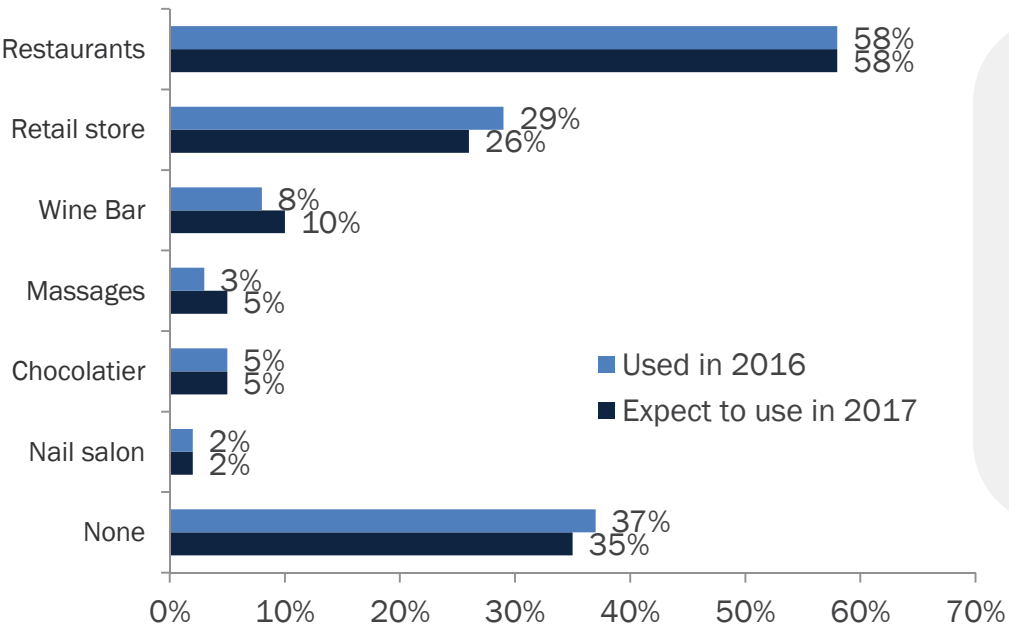
Base: 2017 Baby Boomer Travelers (n=928)
Q5e: In which of the following ways have increased airline fares impacted your travel plans?

No significant difference 2016 vs. 2017

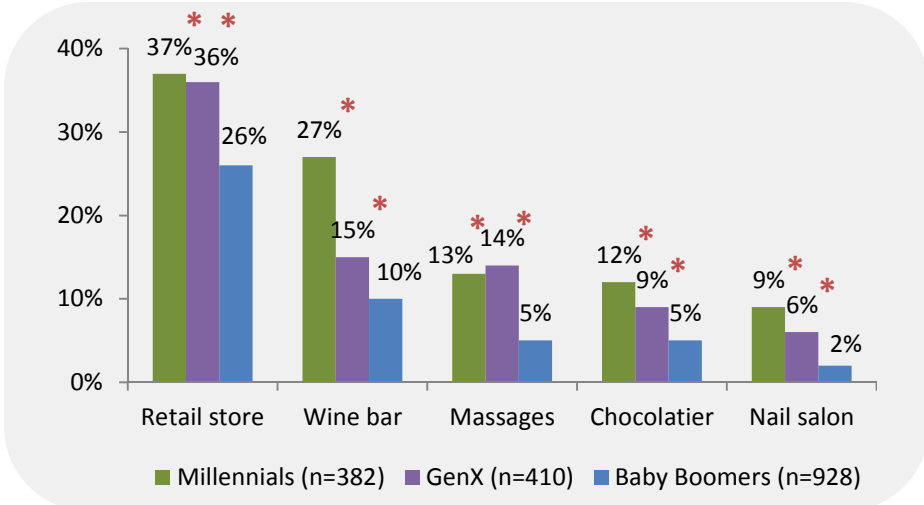
Airport Amenities

- With almost 60% of Boomers visiting an airport restaurant in 2016 and also expecting to do the same in 2017, this is the most popular amenity available to travelers.
- Millennials and GenXers have more interest in all other airport features compared to Boomers.

Actual & Expected Use of Airport Amenities



2017 Expected Use of Airport Amenities – By Generation



* Denotes a significant difference between generations

No significant difference 2016 vs. 2017

Base: 2017 Baby Boomer Travelers (n=928)

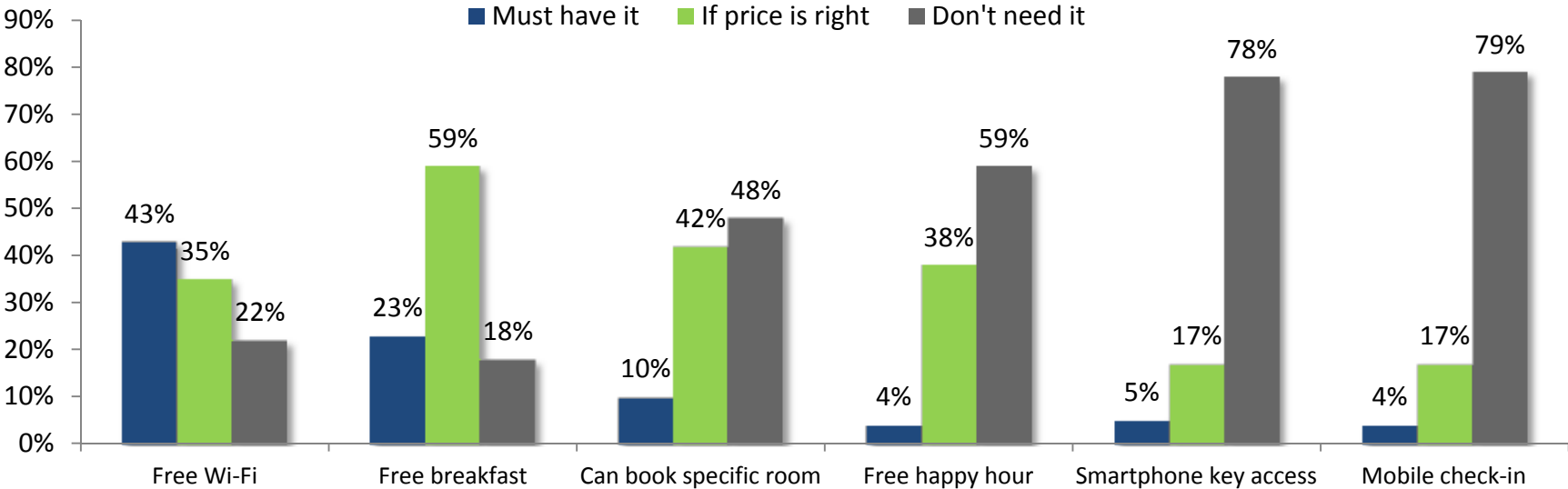
Q5g: Reviewing the list of hospitality services now offered by airports, please indicate those you have taken advantage of in 2016 and those you plan on taking advantage of in 2017.

Hotel Amenities

- Free Wi-Fi continues to be the most important hotel perk across the ages with over four-in-ten reporting it as a “must have” in each generation.
- Mobile app check-in and Smartphone access are not needed by a vast majority of Boomers.

Mobile app check-in is less important in 2017 compared to 2016 with 79% of Boomers saying they “don’t need it” versus 74% last year.

Importance Hotel Perks

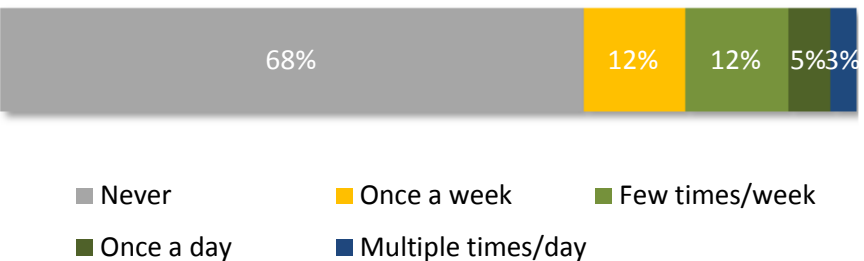


Base: 2017 Baby Boomer Travelers (n=928)
 Q5f: Please indicate to what degree each of the following customer perks impacts your choice of hotels.

Impact of Social Media

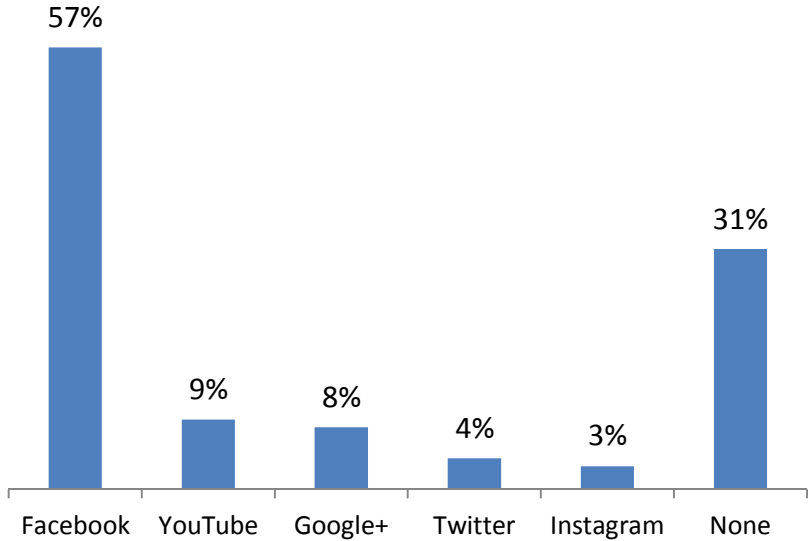
- Social media use while on vacation is sporadic among Boomers with only 20% accessing it a few times a week or more.
- When they do post, however, Facebook is the most common site.

Frequency of Social Media Use While on Vacation



No significant difference 2016 vs. 2017; however, was asked of only those evaluating a trip in 2016 and asked of all in 2017

Social Media Posts



New Question 2017 Travel Trends

Base: 2017 Baby Boomer Travelers (n=928)

Q15c: On average, how frequently do you post to your social media sites while on vacation?

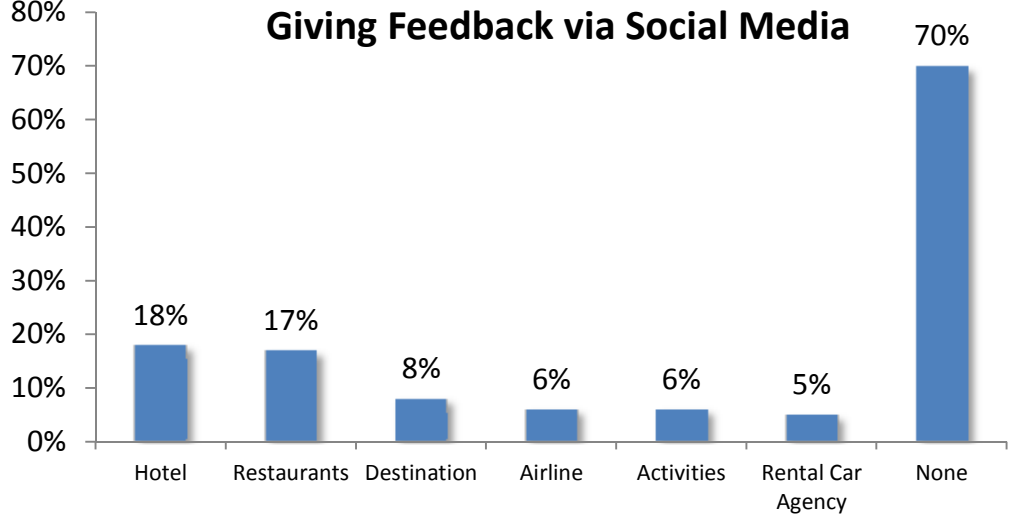
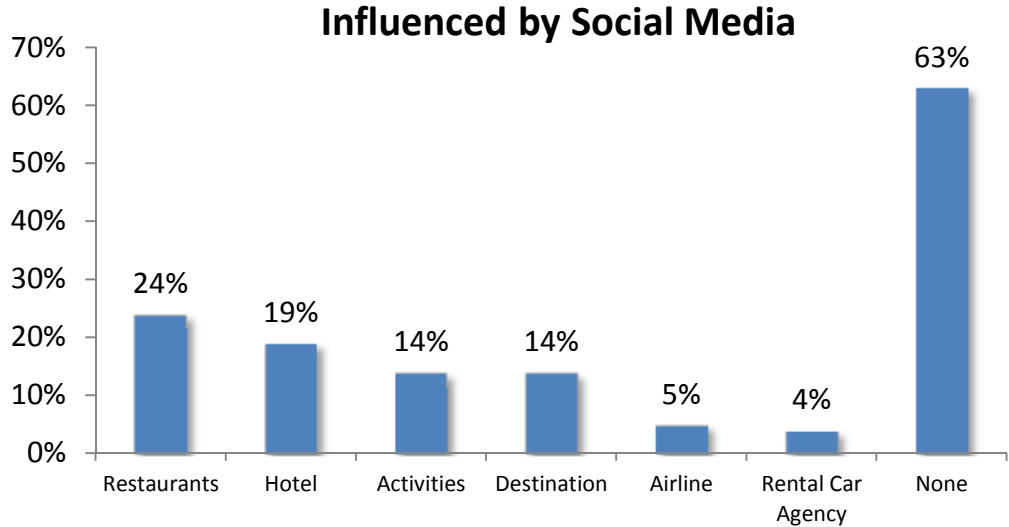
Base: Social Media Users (n=87)

Q15c_2: And which of these sites do you anticipate posting to while on your upcoming trip?

Impact of Social Media

- Since they have minimal social media use, Boomers are not greatly influenced by it nor do they give much feedback via these outlets.
- Millennials and GenXers, across the board, are significantly more influenced by and provide feedback through social media compared to Boomers. (See appendix)

No significant difference 2016 vs. 2017; however, was asked of only those evaluating a trip in 2016 and asked of all in 2017

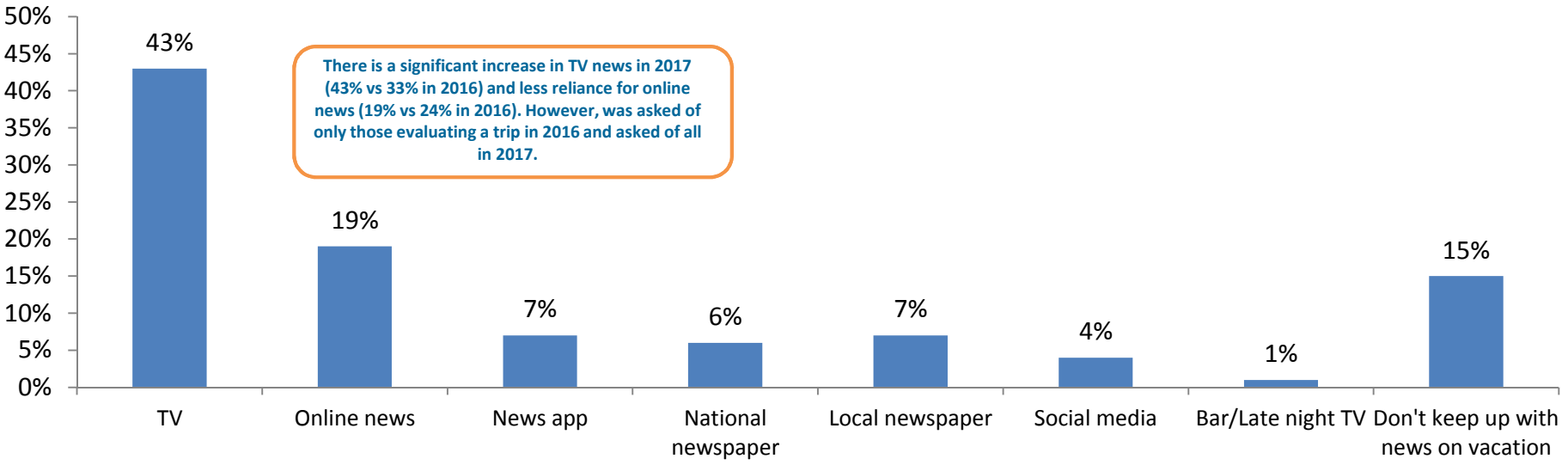


Base: 2017 Baby Boomer Travelers (n=928)
 Q15a: Which aspects of your trip are significantly influenced by what is posted on social media sites?
 Q15b: Which aspects of your trip have you ever used social media to compliment or complain about?

Staying Connected – News Resources

- Most Boomers keep up with current events while traveling for pleasure – primarily via TV or online news.
- Millennials will tap into social media to find out what’s going on more so than any other outlet and at a much higher rate than Boomers (32% vs. 4%, respectively).

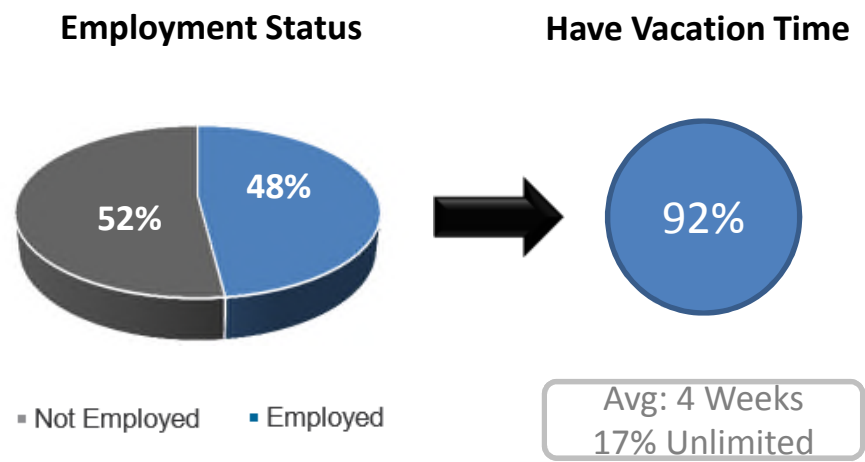
News Media Outlets Used on Vacation



Base: 2017 Baby Boomer Travelers (n=928)
Q15d: What is your favorite way to stay up on the most recent news while on vacation?

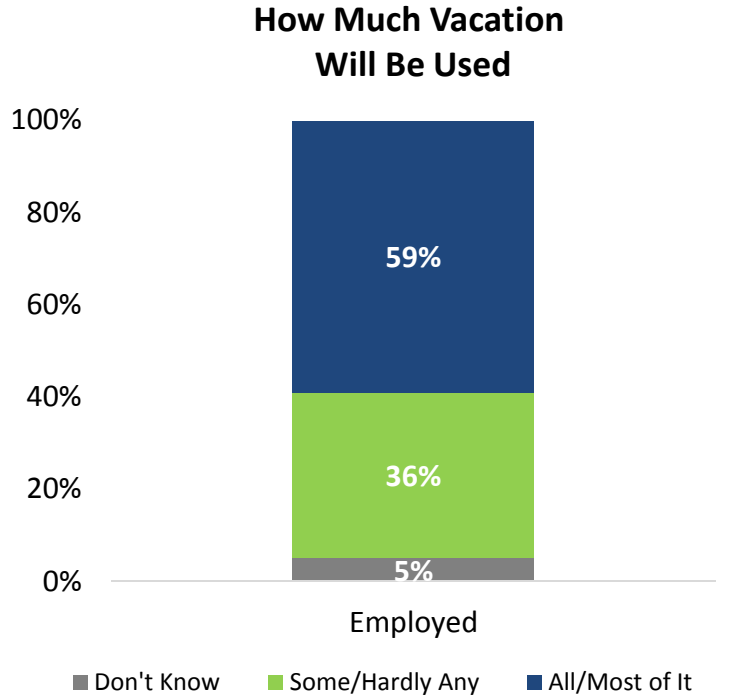
Work and Travel in 2017

- Of the 48% of Boomers that are still employed, a vast majority (92%) have vacation time to burn.
- Of those with time off, just over half feel confident they will use all or most of their days.



Base: 2017 Baby Boomer Travelers (n=928)
QS6a: Which of the following best describes your current employment status?

Base: Employed Baby Boomers (n=446)
Q16a: Approximately, how much vacation time/paid time off will you have in 2017?



Base: Baby Boomers with Paid Time Off (n=412)
Q16b: How much of your paid vacation time will you use for personal travel in 2017?

No significant difference 2016 vs. 2017

Work and Travel in 2017

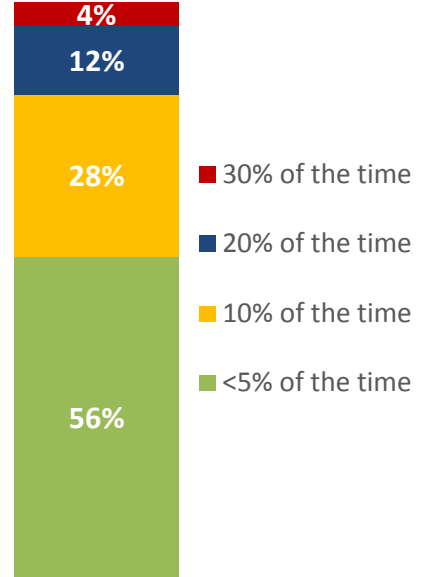
- Two out of ten Boomers feel it is ‘very’ or ‘extremely important’ to stay connected to work while vacationing.
 - The same goes for younger generations (23% Millennials and 20% GenXers)
- Of those Boomers who work on their trip, most spend 10% or less of their vacation time doing so.

Importance of Staying Connected To Work



Base: Baby Boomers with Paid Time Off (n=412)
 Q17: In your opinion, how important is it for you to stay connected to work when you are on personal travel?

How Much Time Working

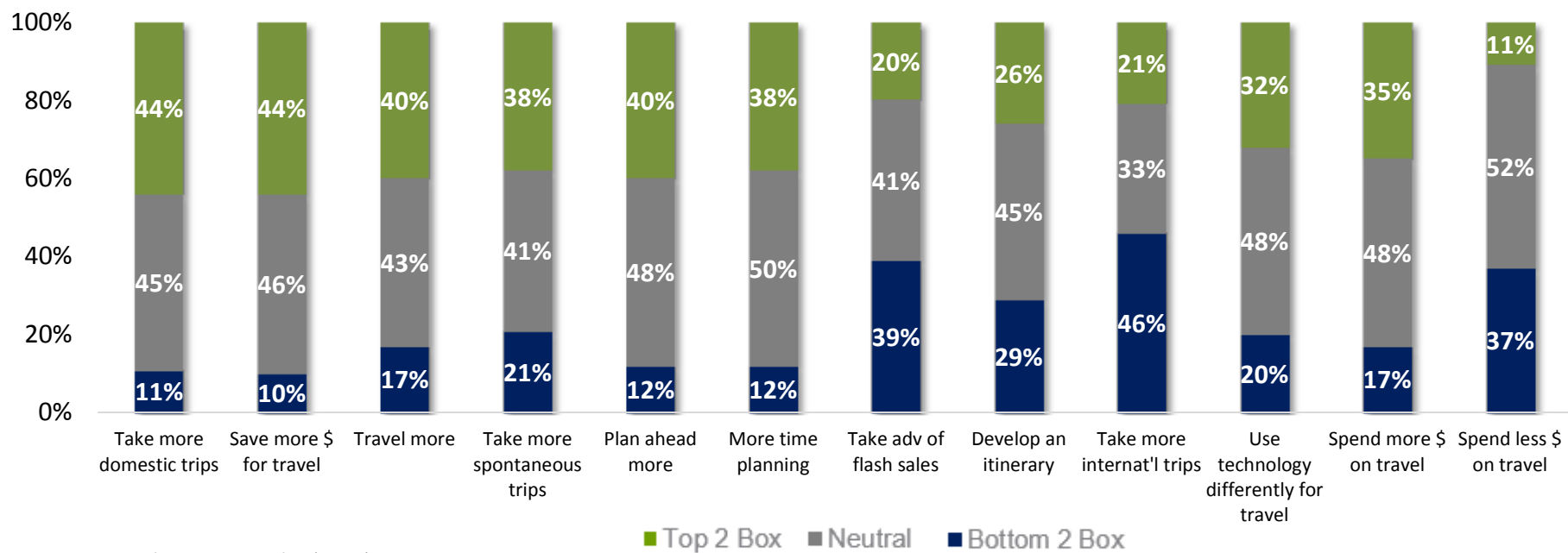


Base: Baby Boomers Likely To Work (n=235)
 Q17b: If you had to guess, what percent of your time do you spend on work-related stuff?

2017 Travel vs. 2016 Travel: What Will be Different

- Boomers indicate a similar disposition toward their travel plans year over year, with a focus on trying to save more money for trips and traveling more (and, specifically, more domestically).
- But for most, no major changes are anticipated.

Degree of Agreement in Change in Travel Behaviors; 2016 to 2017

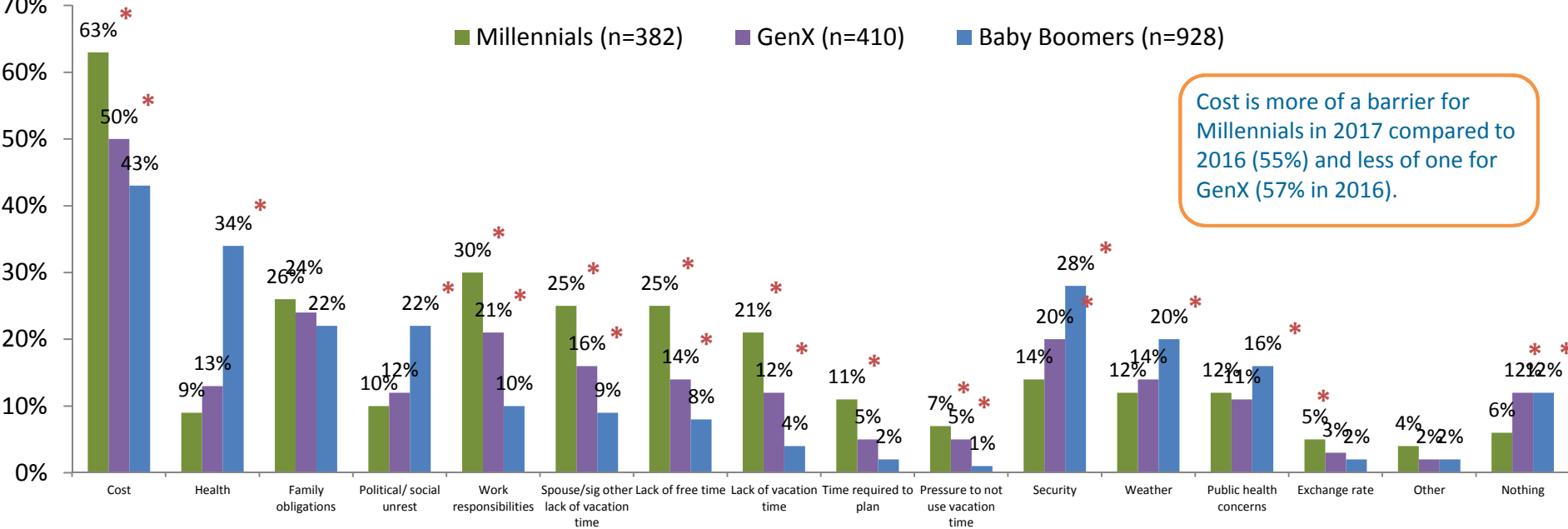


Base: 2017 Baby Boomer Travelers (n=928)
 Q21: Compared to my personal travel in 2016, in 2017 I will.....

Other Barriers to Travel in 2017

- Cost continues to be the biggest barrier to future travel impacting Millennials and GenXers more so than Boomers.
- Time constraints (lack of time, vacation time) are going to be more significant hurdles for the younger generations. While concerns over security, health and weather will impact Boomers to a higher degree in 2017.

What Will Prevent 2017 Travel



Cost is more of a barrier for Millennials in 2017 compared to 2016 (55%) and less of one for GenX (57% in 2016).

Base: 2017 Travelers (n=1721)
 Q22: What, if anything, has prevented you or might prevent you from taking all of the personal trips you'd like to take in 2017?

* Denotes a significant difference between generations

Appendix

Impact of Social Media – By Generation

Influenced by Social Media

Giving Feedback via Social Media

	Millennials (a)	GenX (b)	Baby Boomers (c)
<i>Base:</i>	<i>(382)</i>	<i>(410)</i>	<i>(928)</i>
Restaurants	34% c	32% c	24%
Hotel	24%	24% c	19%
Activities	33% c	26% c	14%
Destination	23% c	19% c	14%
Airline	13% c	9% c	5%
Rental Car Agency	7%	4%	4%
None	41%	48%	63% ab

	Millennials (a)	GenX (b)	Baby Boomers (c)
<i>Base:</i>	<i>(188)</i>	<i>(303)</i>	<i>(573)</i>
Restaurants	31% bc	22% c	17%
Hotel	23% c	22%	18%
Activities	19% c	14% c	6%
Destination	18% c	13% c	8%
Airline	18% bc	11% c	6%
Rental Car Agency	7%	5%	5%
None	48%	57% a	70% ab

Base: 2017 Travelers (n=1,721)
 Q15a: Which aspects of your trip are significantly influenced by what is posted on social media sites?
 Q15b: Which aspects of your trip have you ever used social media to compliment or complain about?

Letters denote a significant difference between generations

Planning Resources – by Generation

Frequently Used

	Hotel/ Air/ Car Sites			Review Sites			Travel Booking Sites*		
	Millennials (a)	GenX (b)	Baby Boomers (c)	Millennials (a)	GenX (b)	Baby Boomers (c)	Millennials (a)	GenX (b)	Baby Boomers (c)
Base:	(233)	(242)	(562)	(233)	(242)	(562)	(233)	(242)	(562)
Plan/Research	44%	38%	38%	49% c	44%	38%	49% c	51% c	37%
Book	41%	42%	41%	7%	7%	6%	28% c	21% c	14%
Restaurant selection/reservations	10% c	7% c	4%	25% c	23% c	13%	7%	6%	4%
Activity selection/reservations	10% c	8%	5%	20% c	18% c	9%	12% c	6%	4%
Weather	2%	3%	3%	4%	4%	6%	1%	4% a	4% a
Directions	1%	2%	2%	2%	4%	5%	1%	2%	2%
Will not use	23%	26%	31% a	25%	31%	47% ab	30%	30%	50% ab

Base: Travelers Evaluating a Trip (n=1,042)

Q11a: Reviewing the list of possible online resources below, please indicate in which ways you may have, or plan to, use each one.

* Expedia, Travelocity, Orbitz, etc.

Letters denote a significant difference between generations

Planning Resources – by Generation

Not Frequently Used

		Mobile Apps			Open Table			Groupon/Living Social		
		Millennials (a)	GenX (b)	Baby Boomers (c)	Millennials (a)	GenX (b)	Baby Boomers (c)	Millennials (a)	GenX (b)	Baby Boomers (c)
Base:		(233)	(242)	(562)	(233)	(242)	(562)	(233)	(242)	(562)
Plan/Research		28% c	24% c	12%	14% bc	6%	5%	15% c	16% c	7%
Book		13% c	9% c	5%	6%	3%	3%	7% c	6% c	1%
Restaurant selection/reservations		17% bc	7%	8%	19% c	14% c	9%	19% bc	10%	6%
Activity selection/reservations		15% c	11% c	6%	7% c	7% c	1%	17% bc	11% c	4%
Weather		22% c	18% c	11%	2%	2%	1%	4%	1%	1%
Directions		21% c	15%	11%	1%	-	<1%	2% c	2% c	<1%
Will not use		44%	46%	70% ab	62%	72% a	84% ab	54%	63% a	85% ab

Base: Travelers Evaluating a Trip (n=1,042)

Q11a: Reviewing the list of possible online resources below, please indicate in which ways you may have, or plan to, use each one.

Letters denote a significant difference between generations

Planning Resources – by Generation

Not Frequently Used
(Continued)

	Social Media			Blogs		
	Millennials (a)	GenX (b)	Baby Boomers (c)	Millennials (a)	GenX (b)	Baby Boomers (c)
Base:	(233)	(242)	(562)	(233)	(242)	(562)
Plan/Research	23% c	17% c	8%	23% c	21% c	8%
Book	3% c	2%	1%	5% c	3% c	1%
Restaurant selection/reservations	12% bc	6%	4%	12% c	7%	4%
Activity selection/reservations	16% c	14% c	3%	11% c	9% c	2%
Weather	6% c	4%	3%	7% bc	2%	2%
Directions	2%	1%	2%	3% c	1%	<1%
Will not use	55%	65% a	85% ab	59%	64%	87% ab

Base: Travelers Evaluating a Trip (n=1,042)

Q11a: Reviewing the list of possible online resources below, please indicate in which ways you may have, or plan to, use each one.

Letters denote a significant difference between generations

Methodology

- A 15-minute online survey was conducted among males and females, 18+, 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 previously using an online travel site within the past 2 years and having an intent to travel for personal pleasure (non-business travel) in 2017.
- The survey was in field from September 15-24, 2016
- A total on n=1,721 surveys were completed; final unweighted counts are detailed in the table to the right
- Final data has been weighted to U.S. Census for analysis, by generation

	Completes
Total	1,721
Age	
18-44	383
45-49	410
50-59	309
60-69	315
70+	304
Gender	
Female	840
Male	881
Race	
Caucasian/Other	1028
African American	294
Hispanic	266
Asian American	133
Region	
West	409
South	648
Midwest	356
Northeast	308

Counts by Age Segment

- The focus of this analysis is among Baby Boomers (adults age 52+) who intend to travel in 2017.
- Millennials (age 19-35) and Gen X respondents (age 36-51) have also been evaluated to compare and contrast travel behaviors for 2017.
- Counts by generations are as follows, weighted.

	Millennials	GenX	Baby Boomers
Total	382	410	928
Age			
19-35	382		
36-51		410	
52+			928
Gender			
Female	187	209	492
Male	195	201	436
Race			
Caucasian/Other	245	270	709
African American	48	51	95
Hispanic	76	66	87
Asian American	12	23	36
Region			
West	92	94	213
South	141	152	343
Midwest	80	90	204
Northeast	69	74	167

Research Team

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