

Travel Research: 2016 Travel Trends

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Executive Summary

Travel in 2016

- Practically all Baby Boomers (99%) anticipate traveling for leisure in 2016, with approximately 4 or 5 trips in the works.
- Many are planning both domestic and international trips (45%), with 5% planning international travel exclusively.
- The desire to travel (aka vacation) comes down to three primary motivators;
 - To spend time with family and friends
 - To relax and rejuvenate
 - To get away from normal everyday life
- Although many trips are anticipated for 2016, approximately one in ten (12%) are completely booked by September 2015, leaving opportunity for AARP to provide resources and guidance, specifically to the 48% for whom it is “still just an idea.”

Executive Summary

Travel in 2016 - continued

- Baby Boomers do not appear to be overly concerned about budgeting for personal travel, nor are they hindered by the higher airfares (approximately two-thirds claim it has had no impact on their travel plans).
- Among those with pets, few (5%) will travel with them 'All the time.' What they do tend to take with them on all trips are their medications, a comfortable pair of shoes, a camera, and sunglasses. And different than the younger generations, Baby Boomers will also take a good book and emergency numbers.
- And there is no surprise why personal travel is so prevalent, as travelers say that when they are on vacation they smile and laugh more, are more likely to learn something new, and have more time to spend with those they love.

Executive Summary

Trip Details

- Baby Boomers find lots of reasons to travel abroad, with the most popular trip types being Bucket List, Multi-Generational, or Summer Vacations.
 - Europe and the Caribbean and surrounding areas are key destinations for international travelers.
 - Final locations are equally likely to be a city, a beach, or on a cruise.
- Of the 95% who will travel domestically in 2016, Summer Vacations, Multi-Generational trips, and Weekend Getaways are the primary impetus behind such plans.
 - Popular domestic destinations are either a city/town or a beach, with Florida, Las Vegas, California, New York and Hawaii being mentioned the most.
- Hotels attract the most guests with a significant portion of domestic travelers (30%) planning to stay with friends and family.

Executive Summary

General Travel Behaviors

- Baby Boomers do not tend to linger in airports and are the least likely generation to take advantage of various airport amenities, with the exception of restaurants.
- Offering free Wi-Fi and a complimentary breakfast can be a competitive advantage for hotels, as these are Boomers' top two "must haves."
- Social media plays a very small role in influencing or occupying this older generation with two-thirds of Baby Boomers saying they will NOT post to a social media site while on vacation.
- That said, the majority (83%) will stay connected to the outside world by keeping up with the news they get via TV and online.
- US workers continue to behave differently than those in other countries, with only slightly over half (54%) citing they will use all of their vacation time in 2016. And even then, when they do travel, one-third are likely to bring work with them, absorbing approximately 10% of their vacation time.

Travel Snapshot By Generation

- A quick review of key leisure travel elements shows important differences by generation.
- Types of trips taken vary slightly by age.
- Baby Boomers will not use online resources for planning and booking trips to the same degree that their younger counterparts will.
- 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 rising airfares.

	Millennials (a)	Generation X (b)	Baby Boomers (c)
Destination	<i>Base:</i> (294)	(529)	(888)
International	13% c	8%	5%
Domestic	42%	46%	50%
Both	46%	46%	45%
Number of Trips (Average)			
International Only	2.5	3.0	2.7
Domestic Only	4.7	3.6	3.9
Top 5 Trip Types: International	<i>Base:</i> (171)	(287)	(447)
Multi-generational trip	26%	34% c	20%
Summer vacation	30% c	25%	20%
Bucket list trip	16%	14%	32% ab
Romantic getaway	29% c	24%	18%
Celebration vacation	20%	18%	19%
Top 5 Trip Types: Domestic	<i>Base:</i> (257)	(486)	(841)
Summer vacation	28%	36% c	30%
Multi-generational trip	33% c	35% c	26%
Weekend getaway	35% c	37% c	23%
Holiday travel	25%	21%	19%
Romantic getaway	24% c	18% c	12%
Top Planning Resources (% Will Use)	<i>Base:</i> (188)	(303)	(573)
Hotel/Air/Car websites	85% c	79% c	71%
Review websites	79% c	76% c	59%
Travel booking websites	77% c	74% c	50%
Mobile apps	65% c	63% c	40%
Other travel sites	58%	51%	48%
Groupon/Living Social	55% c	44% c	22%
Budget Use	<i>Base:</i> (188)	(303)	(573)
% Yes	65% c	63% c	42%
Impacted by Higher Airfare	<i>Base:</i> (294)	(529)	(888)
% Caused Change in Plans	63% c	57% c	37%

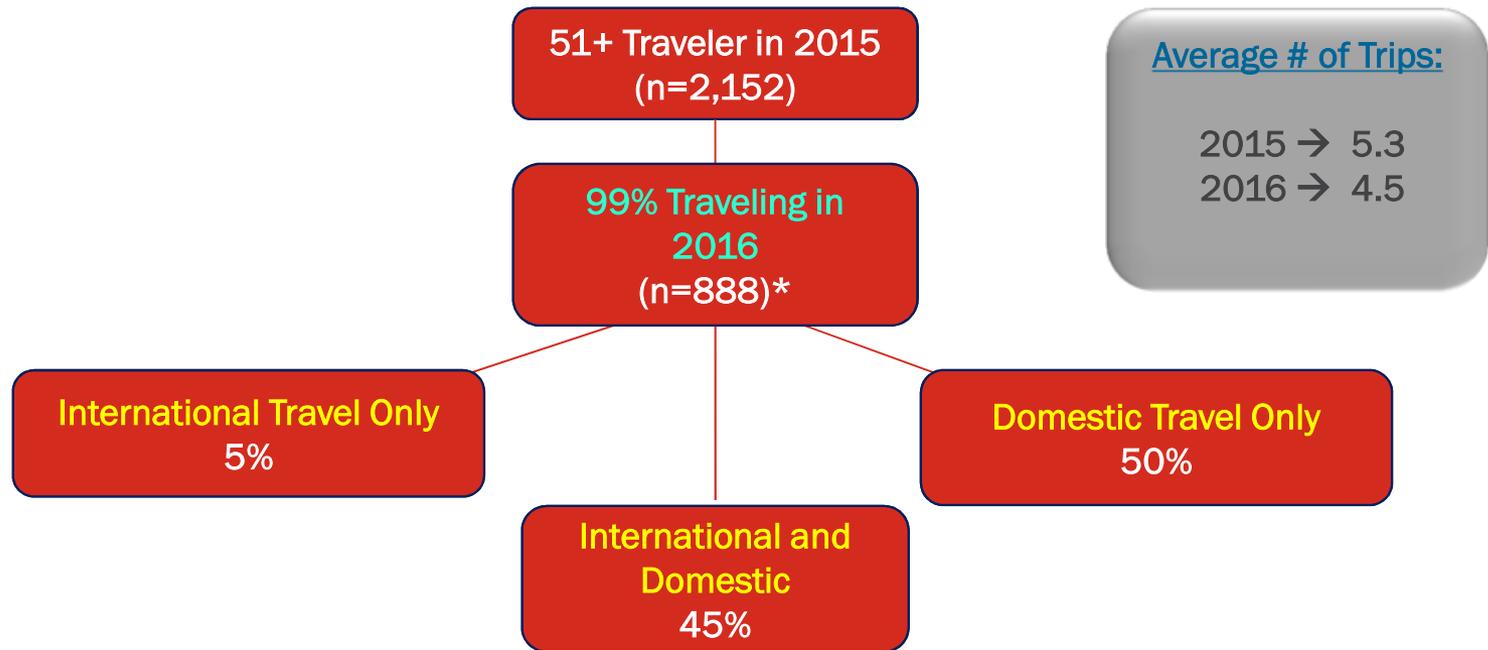
Letters denote a significant difference between generations

SIZING THE AUDIENCE

2016 Travel Audience

- Very similar to 2015, 99% of Baby Boomers anticipate taking at least one trip for personal/leisure purposes in 2016 (January – December 2016).

There is a significant increase in the anticipation of international travel only, comparing 2015 (3%) plans to those of 2016 (5%).



S11: And finally, how many personal trips do you anticipate taking next year, in the calendar year of 2016? Base: Screener, Baby Boomers (51+) Travelers (n=2,152)
Q1a: How many of these trips will be international and how many will be domestic? Base: 2016 Baby Boomer Travelers (n=888)
S9/S10: Calculates Total Trips Taken in 2015 Base: 2016 Baby Boomer Travelers (n=888)

* Qualified for survey quotas

Audience Profiles

- Looking specifically at Baby Boomers who anticipate leisure travel in 2016, there are not any significant demographic differences among those who plan to travel domestically versus abroad.
- Those who anticipate traveling internationally only, although too small to be conclusive, appear to skew single and slightly more ethnically diverse than domestic travelers.

Audience profiles in 2015 and 2016 are very similar in composition.

2016 Baby Boomer Traveler Audience Profiles			
	International Traveler	Domestic Traveler	World Traveler
<i>Base:</i>	47	441	400
AARP Membership	(a)	(b)	(c)
Member	53%	63%	63%
Non-Member	47%	37%	37%
Gender			
Male	60%	46%	47%
Female	40%	54%	53%
Age			
51-59	39%	32%	35%
60-69	37%	35%	33%
70+	24%	33%	32%
Ethnicity			
Caucasian/Other	69%	79%	76%
African American	9%	9%	10%
Hispanic	18% c	10%	8%
Asian American	4%	2%	6% b
Income			
Average	\$91K	\$83K	\$101K b
Marital Status			
Single/never married	20% bc	5%	8%
Married/living together	62%	74%	72%
Divorced/separated	10%	12%	13%
Widow	8%	9%	7%

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

- It appears the key motivation for vacationing/traveling does not change over time, as the top three motivators for leisure travel in 2016 are the same as those stated in 2015; albeit they are in a slightly different rank order.
 - Millennials are more likely than other generations to be motivated by the desire to “go on an adventure” (23% vs. 10% GenX and 9% Baby Boomers)

2015 Trip Motivators:

1. Get away from normal life (57%)
2. Spend time with family/friends (55%)
3. Relax/rejuvenate (54%)

1

54% *To spend time with family and friends*

2

42% *To relax and rejuvenate*

3

39% *To get away from normal everyday life*

Base: Baby Boomers Evaluating a Trip (n=573)

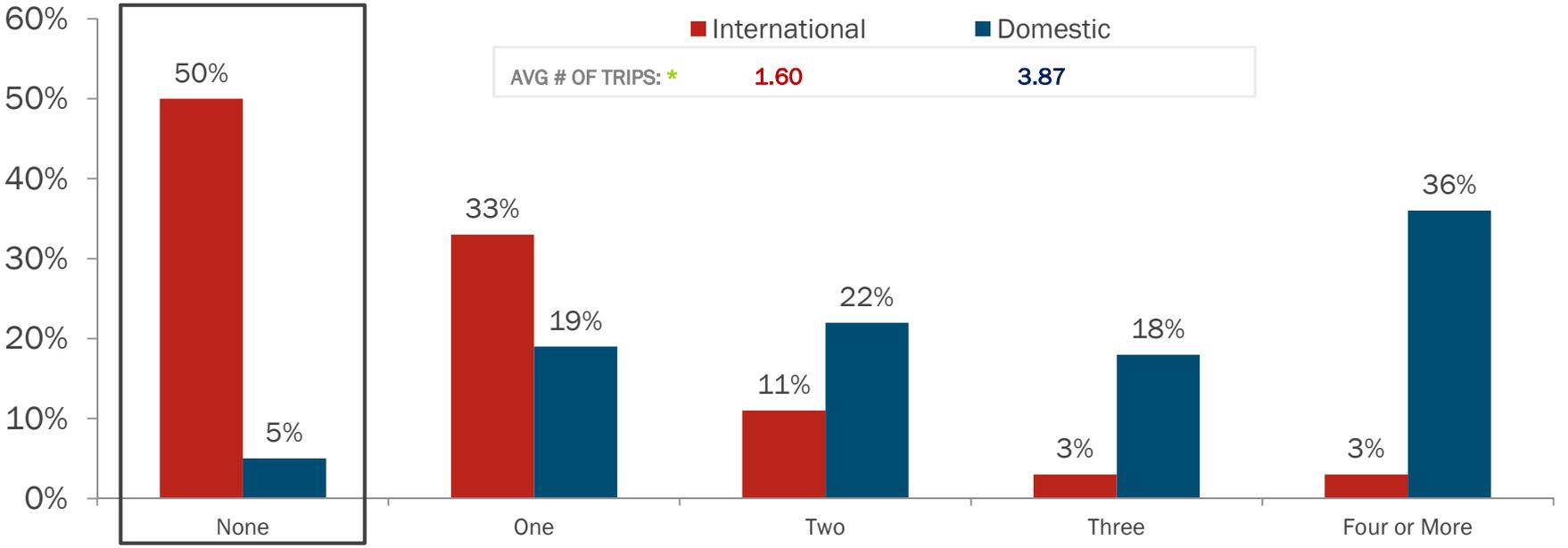
Q9b: Please select your top three motivators for choosing the destination for this trip.

DETAILED FINDINGS: TRAVEL PLANS

Number of Trips Anticipated

- Domestic travel remains the most popular with 95% of Baby Boomers planning a trip within the US next year. Half (50%) of all leisure travelers look to go abroad.
 - Millennials indicate significantly more trips planned for 2016 than Baby Boomers (2.2 International and 5.2 Domestic).
 - Asians appear to travel the least, domestically (2.8), compared to other ethnicities (3.2 Hispanics, 4.0 African Americans, 3.8 White).

Number of Trips Anticipated By Destination



■ International ■ Domestic
 AVG # OF TRIPS: * 1.60 3.87

No significant difference 2015 vs. 2016

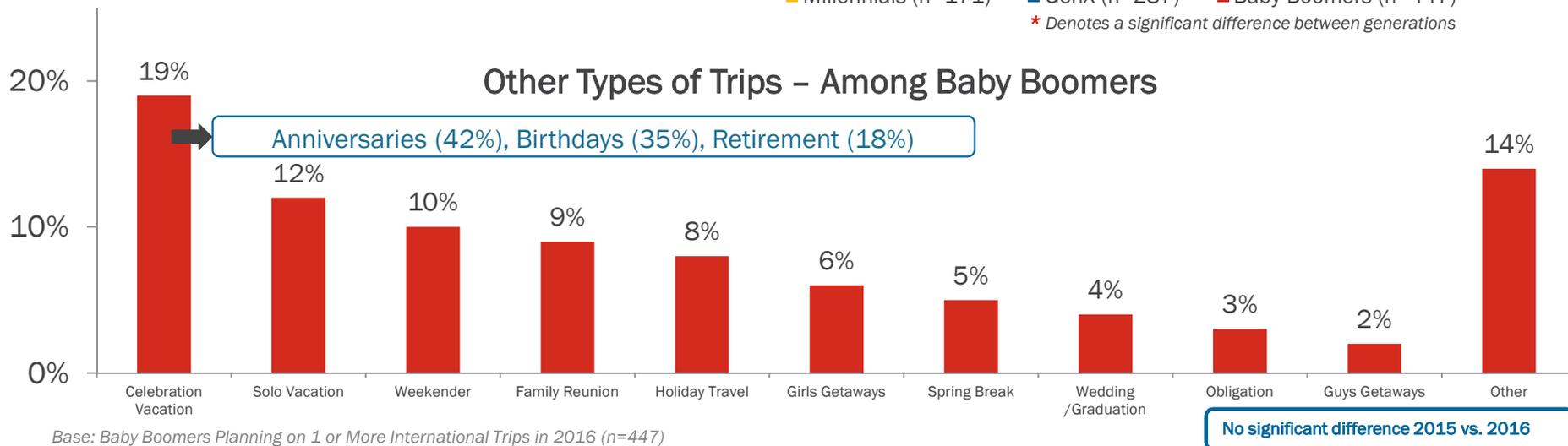
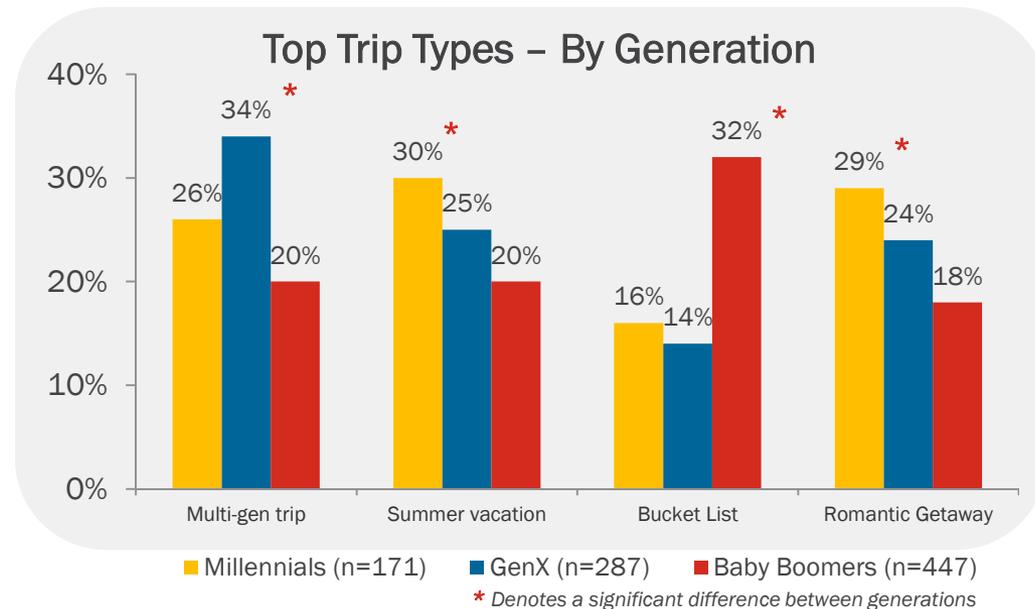
Base: 2016 Baby Boomer Travelers (n=888)

Q1a: A moment ago you mentioned you anticipate taking [number] personal trips in 2016. 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

- International travel attracts different generations for different types of trips.
- Baby Boomers will travel abroad more so for a Bucket List trip than any other type of trip.



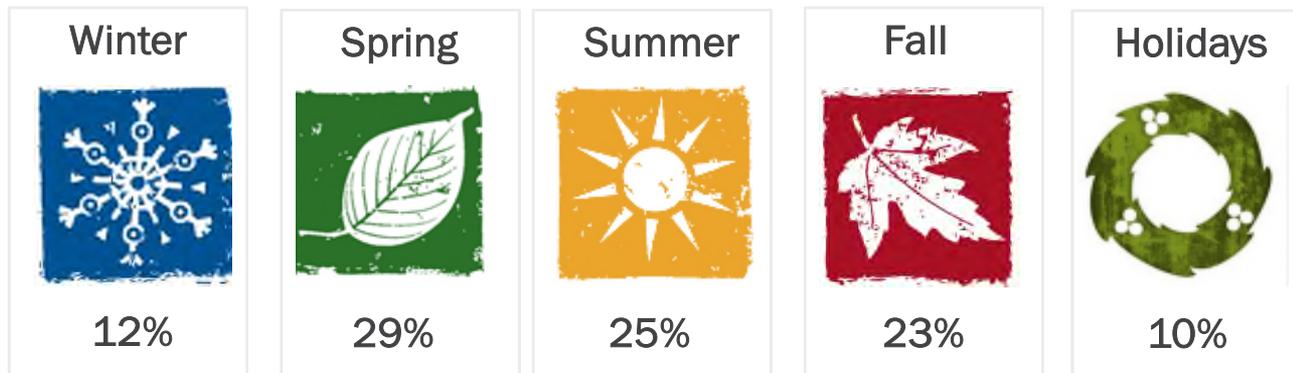
Base: Baby Boomers Planning on 1 or More International Trips in 2016 (n=447)

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)?

Time of International Travel

- Spring and Summer remain the most popular seasons for International travel.
- That said, there are some preferences by type of trip:
 - Bucket List Trips are being planned for Spring or Fall of 2016.
 - Beyond Spring Break, Solo Vacations and Girls Getaways are most popular for the Spring.
 - Family Trips, Family Reunions, and of course Summer Vacations all gravitate toward the summer months.



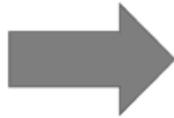
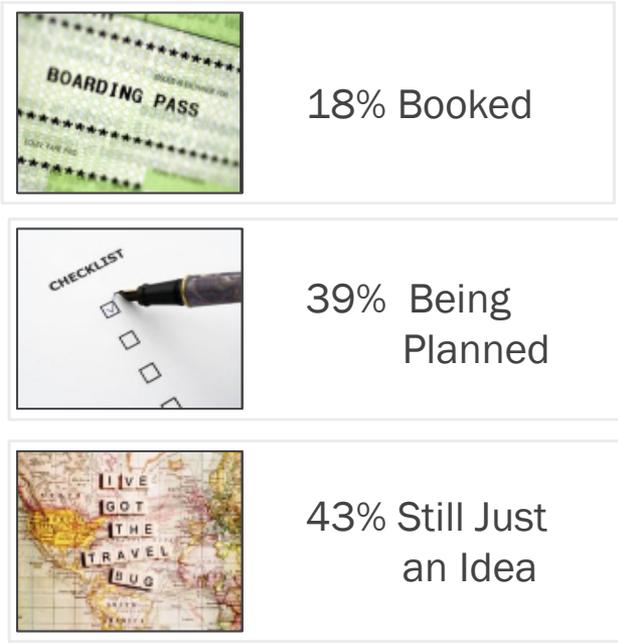
Base: Baby Boomer International Trips anticipated for 2016 (n=835)

Q2b: Thinking about your upcoming international trips listed below, please indicate the time of year, or season you plan to travel.

No significant difference 2015 vs. 2016

Commitment to International Travel

- By September 2015, just 18% of all International travel planned for 2016 has been fully booked, with Wedding/Graduation trips the most likely.
- Among those in the planning phase, most (77%) have chosen their destination.
- International trips most likely **just an idea** include Romantic Getaways, Summer Vacations, and Family Trips.



Among those planning, 77% have already chosen their destination

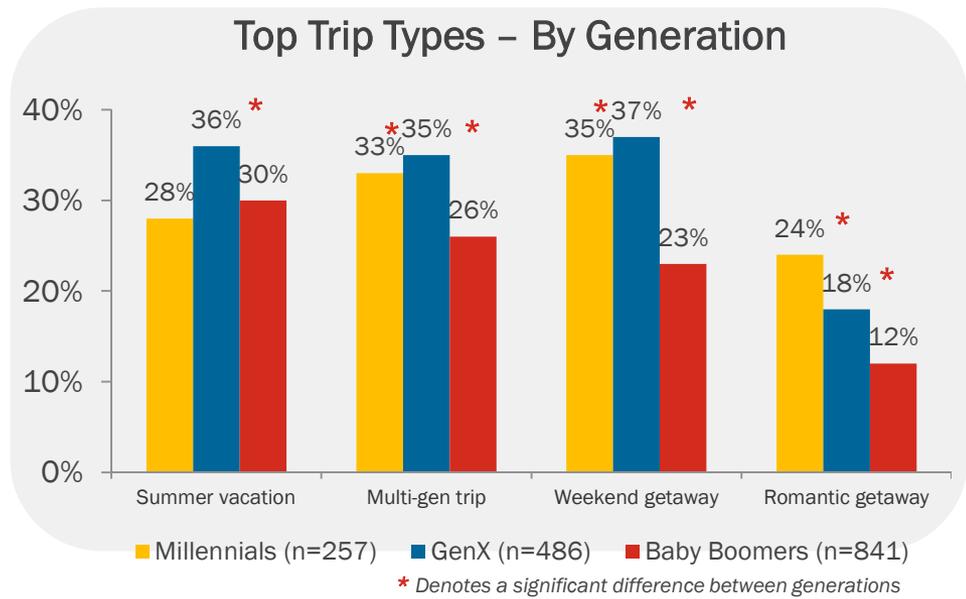
Base: Baby Boomer International Trips anticipated for 2016 (n=835)
Q3a: Of the international trips you anticipate taking next year, please indicate if it is booked, being planned, or just an idea.
Q3b: For those international trips that are still in the planning phase, have you selected a final destination? Base: Baby Boomer International Trips In Planning Phase for 2016 (n=474)

No significant difference 2015 vs. 2016

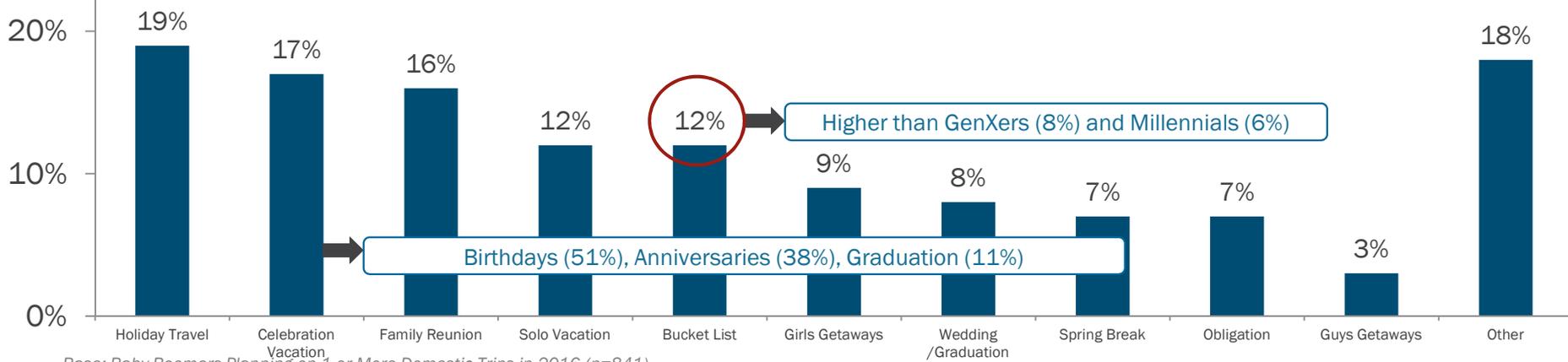
Types of Domestic Trips Anticipated

- As seen with international travel, types of domestic trips planned vary by generation.
- For Baby Boomers, domestic travel plans look similar to that of 2015 with Summer Vacations and Multi-Gen trips being the most anticipated.
- For Millennials and GenXers, Weekend Getaways top their list.

Multi-gen trips were more anticipated by Boomers in 2015 (32%) than in 2016 (26%).



Other Types of Trips – Among Baby Boomers



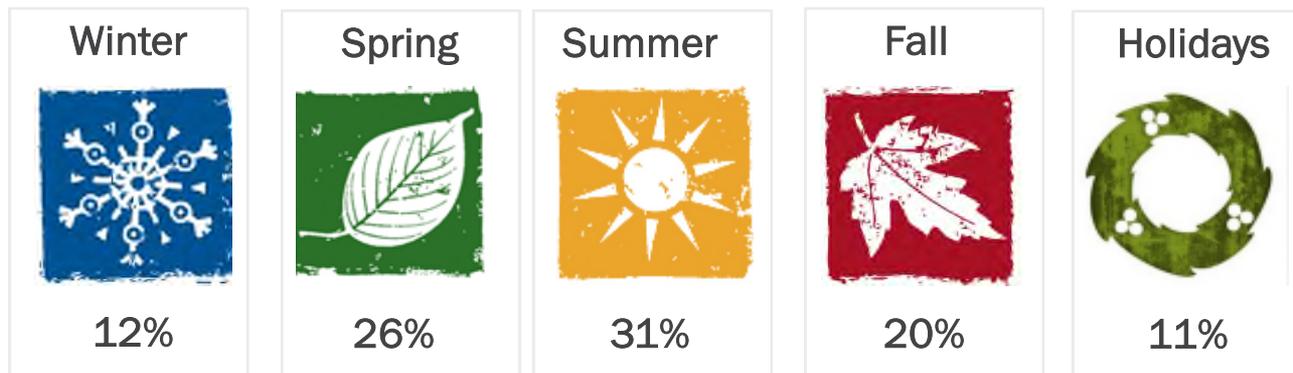
Base: Baby Boomers Planning on 1 or More Domestic Trips in 2016 (n=841)

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)?

Time of Domestic Travel

- With the exception of Holiday travel, the winter months are not very popular for domestic leisure travel.
- Among Baby Boomers:
 - Spring is attractive for domestic Weddings, Required travel, and Guys Getaways.
 - Summer time trips include Multi-generational trips, Reunions, and other events.
 - Fall is most popular for Girls Getaways and Bucket List trips.
 - As for Weekend Getaways, travelers have them planned throughout the year.



Base: Baby Boomer Domestic Trips anticipated for 2016 (n=1901)

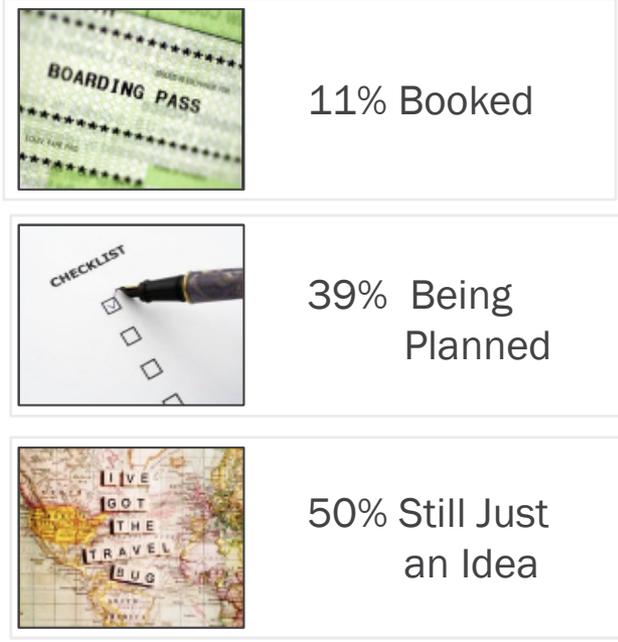
Q4b: Thinking about your domestic trips listed below, please indicate the time of year, or season you plan to travel.

No significant difference 2015 vs. 2016

Commitment to Domestic Travel

- Travelers are less committal to domestic trips;
 - By September 2015, only 11% have booked their trip compared to the 18% who have already booked their international travel.
 - Half of all domestic trips are currently “Just an Idea.”

This time last year, significantly more travelers were in the Planning phase (46%) with 43% citing it was just an idea.



Among those planning, 78% have already chosen their destination

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 2016 (n=1901)
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 2016 (n=957)

Planning Resources

Frequently Used

	Hotel/ Air/ Car Sites	Review Sites	Travel Booking Sites*
Plan/Research	39%	43%	39%
Book	41%	4%	14%
Restaurant selection/reser- vations	3%	16%	5%
Activity selection/reser- vations	5%	11%	7%
Weather	3%	5%	6%
Directions	7%	7%	7%
Will not use	29%	41%	50%

* Expedia, Travelocity, Orbitz, etc.

- Planning for trips typically includes some online research at a brand's website, a review site or at a travel booking site.
- That said, it appears only the brand specific websites are used for the actual booking of hotel, air, or car reservations (41%).
- GenXers and Millennials are significantly more likely to use travel booking sites to plan and book their trips than are Baby Boomers (74%, 77% vs. 50%, respectively).

Base: Baby Boomers Evaluating a Trip (n=573)

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

Unable to compare 2015 vs. 2016 due to differences in how the question was asked.

Planning Resources – continued

- Regarding other online and/or mobile apps available to aid in travel plans, very few (<10%) Baby Boomers rely on them for planning or booking.
- Mobile apps are used more often than other resources, and mainly for directions (19%) or weather (14%).
- Millennials and GenXers are significantly more likely to use the additional digital options available today than are Baby Boomers.

Not Frequently Used

	Mobile Apps	Open Table	Groupon/Living Social	Social Media	Blogs
Plan/Research	16%	5%	7%	9%	8%
Book	6%	3%	3%	1%	1%
Restaurant selection/reservations	11%	12%	7%	2%	2%
Activity selection/reservations	7%	1%	5%	4%	3%
Weather	14%	<1%	<1%	2%	2%
Directions	19%	5%	7%	6%	7%
Will not use	60%	77%	78%	80%	83%

Base: Baby Boomers Evaluating a Trip (n=573)

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

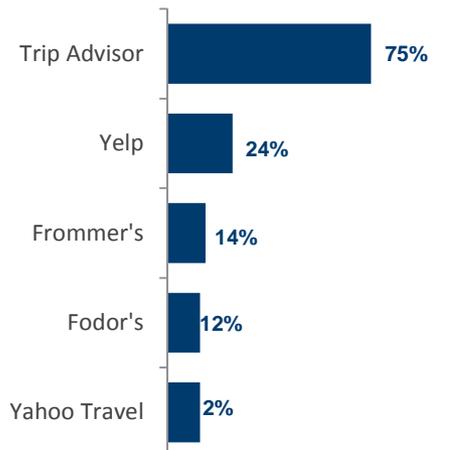
Planning Resources – Most Used

- As far as the specific sites being used, the big ones are still the big ones; Trip Advisor, Expedia, Facebook, Google Maps.
- Millennials favor **Twitter** & **Instagram** more often than those older (~30% vs. 10%), while **Yelp** is used by both Millennials (51%) and GenXers (36%) more so than Baby Boomers (24%).

Unable to compare 2015 vs. 2016 due to differences in how the question was asked.

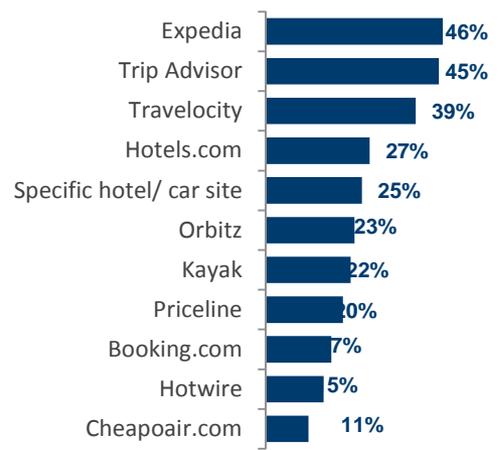
Q11b_1,2,4: Which specific [Q11b response] did you use, or will you use, to help with planning and/or getting ideas and inspiration for your trip?
 Q11b_5: Which specific mobile travel apps do you plan on using on your upcoming trip and which one have you used most often on past trips?

Review Sites



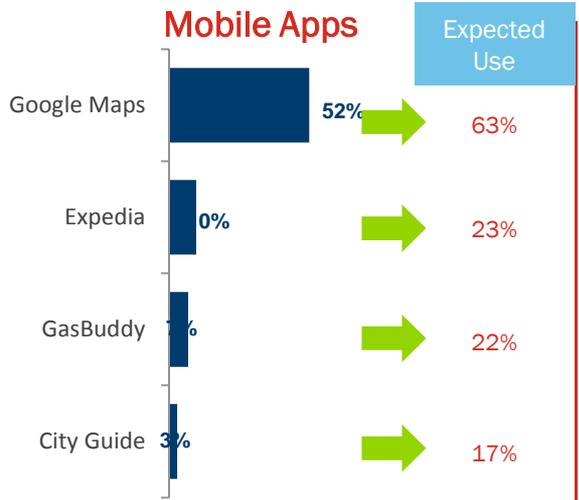
Base: Baby Boomers Using a Review Site (n=340)

Booking Sites



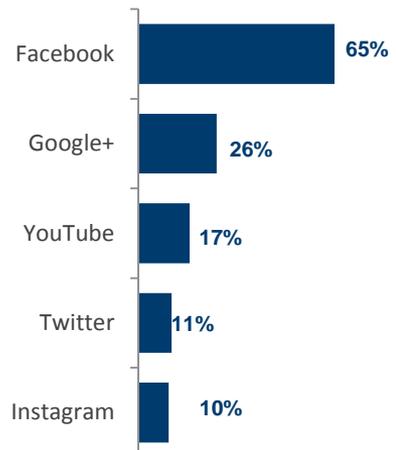
Base: Baby Boomers Using a Booking Site (n=288)

Mobile Apps



Base: Baby Boomers Have Used/Expecting to Use Mobile Apps (n=230)

Social Media

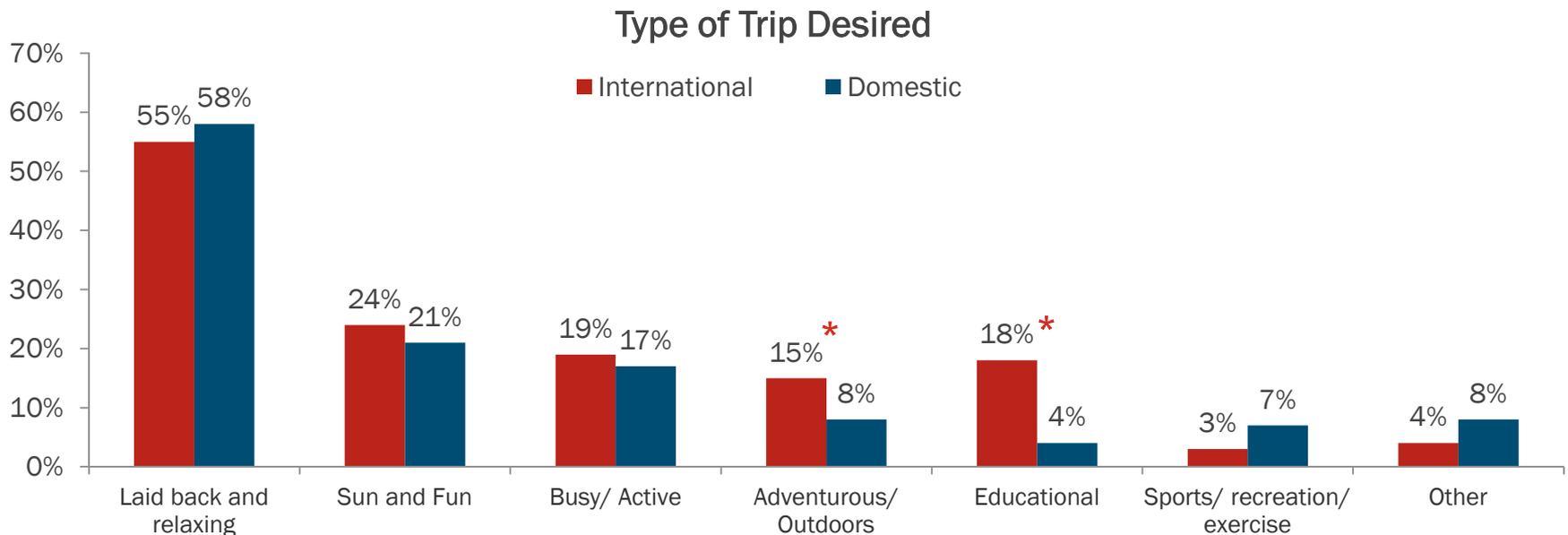


Base: Baby Boomers Using Social Media (n=114)

DETAILED FINDINGS: TRAVEL SPECIFICS

Type of Trip Desired

- Regardless if the trip is international or domestic, most travelers are looking for something that is **laid back and relaxing**.
- The only differences seen by generations are the Millennials are more likely to want a **Sun and Fun** (31%) or **Adventurous/Outdoors** (19%) trip more so than are Baby Boomers.



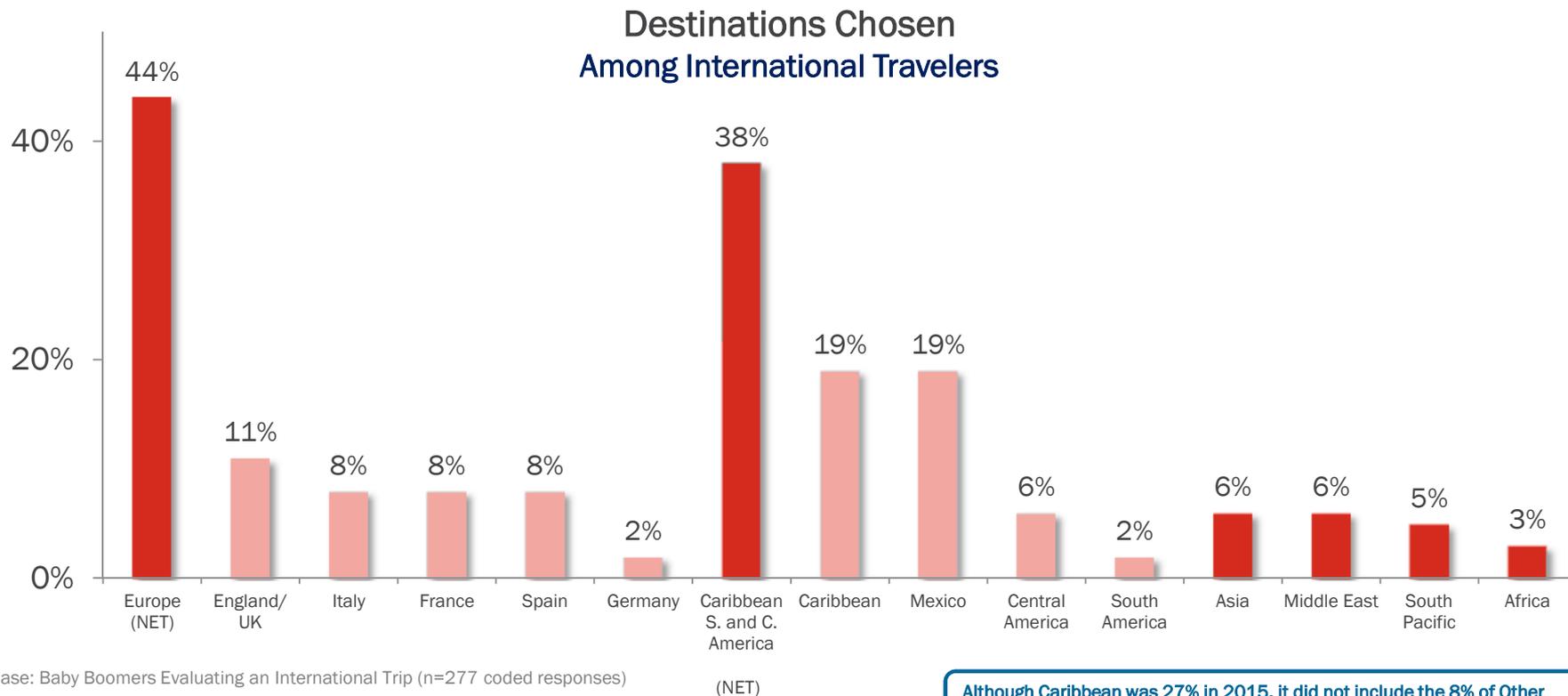
* Denotes a significant difference between travel segments

Base: Baby Boomers Evaluating a Trip (International: n=191; Domestic: n=382)
Q9a: Which of the following best describes the type of trip you want it to be?

Unable to compare 2015 vs. 2016 due to differences in how the question was asked.

Selected Destinations – International

- Europe attracts the most international travelers followed closely by the Caribbean and surrounding areas.
 - GenXers (46%) and Baby Boomers are almost twice as likely as Millennials (27%) to have their sights set on Europe; Millennials indicate a variety of destinations planned.

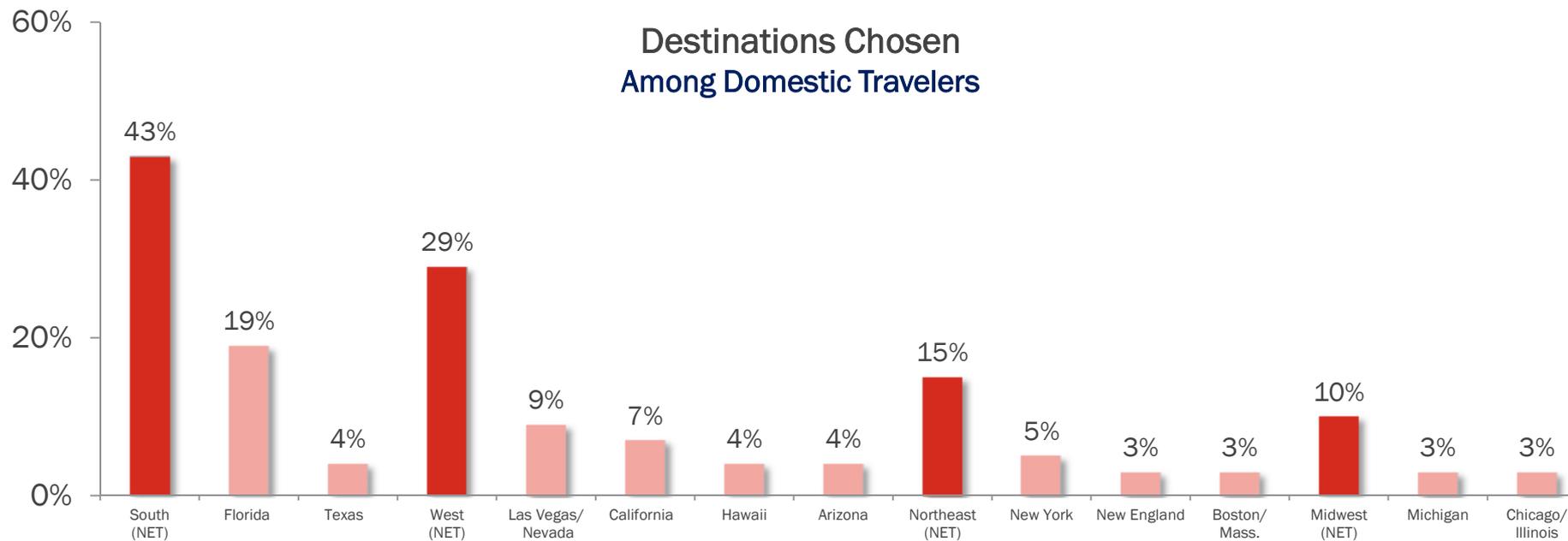


Base: Baby Boomers Evaluating an International Trip (n=277 coded responses)
Q3c: For the trips listed below, please tell us where you have chosen to go.

Although Caribbean was 27% in 2015, it did not include the 8% of Other mentions, so no significant difference 2015 vs. 2016

Selected Destinations - Domestic

- Looking at domestic travel plans, a large portion of Baby Boomers are headed to southern destinations (43%), with Florida being mentioned most.
- Big cities continue to also attract leisure travelers; Las Vegas, New York, Boston, Chicago.



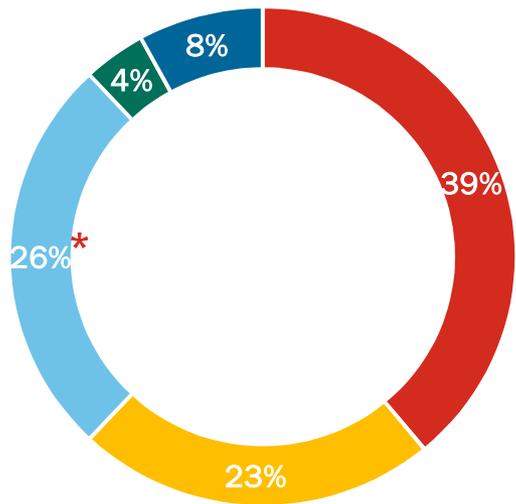
Base: Baby Boomers Evaluating a Domestic Trip (n=722 coded responses)

Q5c: For the trips listed below, please tell us where you have chosen to go.

No significant difference 2015 vs. 2016

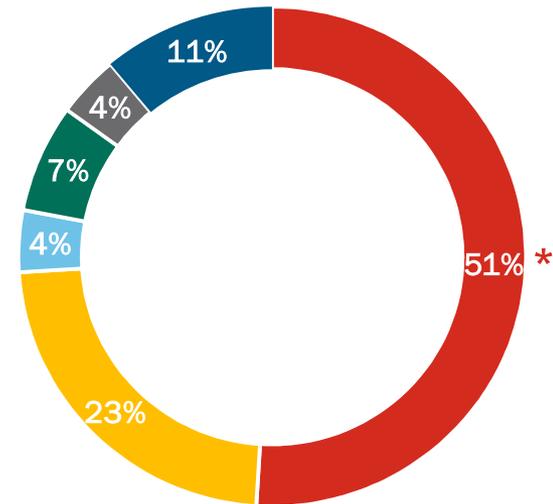
Type of Destination Location

International



Base: Baby Boomers Evaluating an International Trip (n=191)

Domestic



Base: Baby Boomers Evaluating a Domestic Trip (n=382)

■ City/Town

■ Beach

■ On the water*

■ Mountains

■ Parks/Campgrounds

■ Other

* On the water includes cruises, lakes, rivers

- Those traveling abroad cite Cities, Beaches, and On the Water to almost an equal degree.
 - Baby Boomers are significantly more likely than those of younger generations to take a cruise in international waters (26% vs. 7%, respectively).
- Those traveling within the U.S. gravitate toward a City/Town or a Beach for their leisure travel.
 - ‘Other’ domestic locations include theme parks, second homes, staying with friends/family

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

* Denotes a significant difference between travel segments

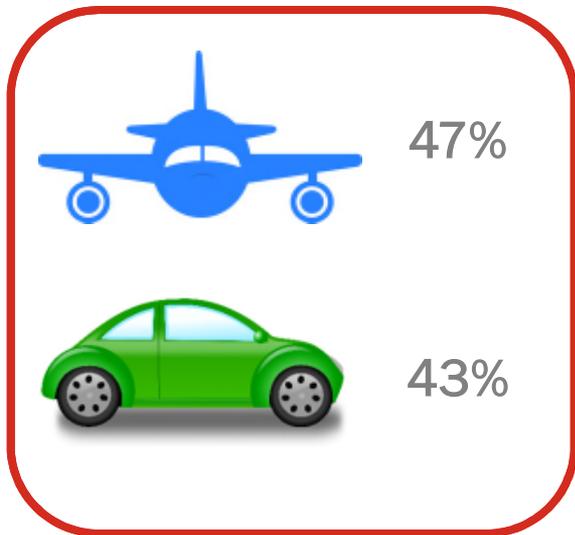
No significant difference 2015 vs. 2016

Transportation & Accommodations

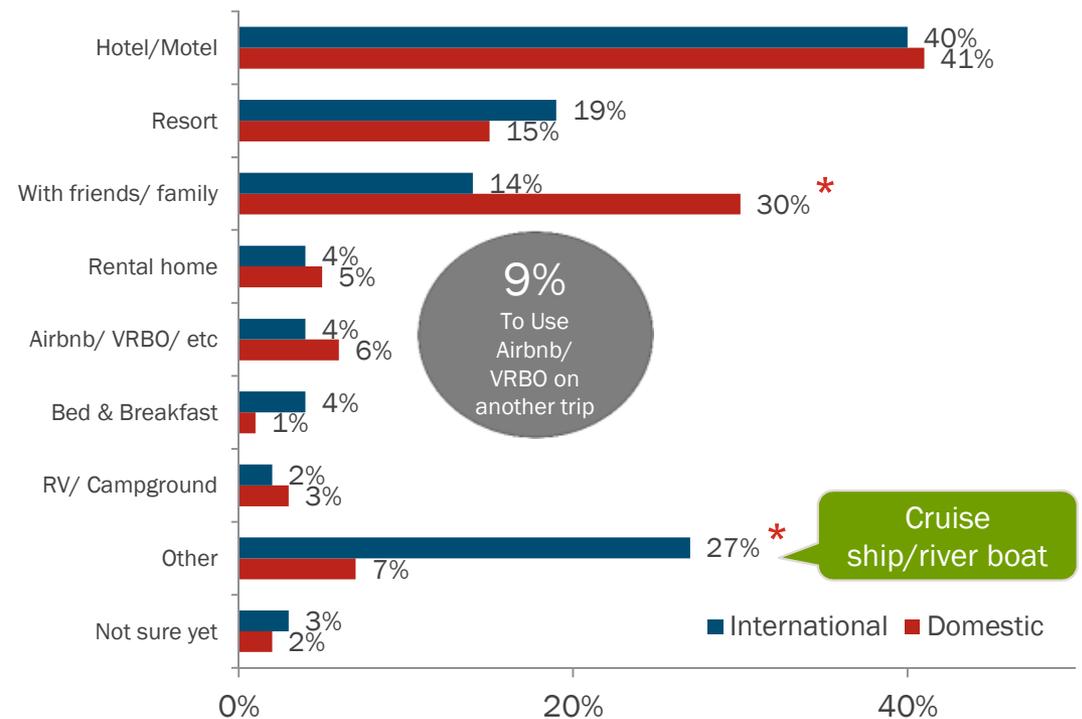
- To travel within the states, approximately half will go by air, half will travel by ground.

- Whether international or domestic, Hotels are the most popular type of accommodations.

Primary Mode of Transportation - Domestic



Accommodations



Base: Baby Boomers Evaluating an Trip (International: n=191; Domestic: n=382)
 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 2016?

No significant difference 2015 vs. 2016

What's Different on Vacation

- Vacations encourage more **smiling and laughing**, along with **learning something new**. What it discourages is eating healthy and exercising – it's truly about letting go.

Vacation Behavior Compared to Everyday Habits

MORE		SAME		LESS	
Smile/Laugh	68%	Dream	67%	Eat healthy	46%
Learn something new	63%	Sleep	52%	Exercise	35%
Time with friends/family	61%	Reflect	47%	Read	29%
Reflect	39%	Eat healthy	44%	Sleep	27%
Read	34%	Exercise	44%	Dream	16%
Sleep	22%	Read	37%	Time with friends/family	15%
Exercise	21%	Learn something new	32%	Reflect	14%
Dream	17%	Smile/Laugh	30%	Learn something new	5%
Eat healthy	10%	Time with friends/family	24%	Smile/Laugh	2%

Base: 2016 Baby Boomer Travelers (n=888)

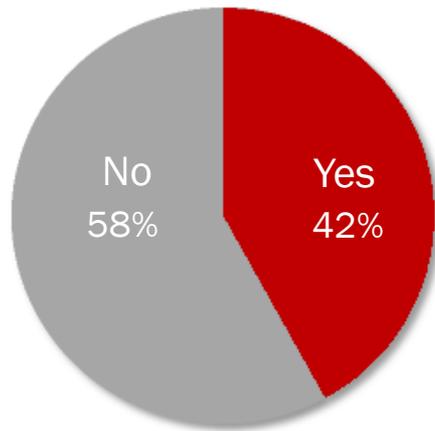
Q20a: When on vacation, do you find that you do the following more, less or about the same compared to your everyday habits?

New question 2016 Travel

Adherence to a Budget

- Vacation budgets are not prominent among Baby Boomers. Among those who set one, the vast majority are able to stay within it.
- Both GenXers (63%) and Millennials (65%) are more likely than Baby Boomers to set a budget for their vacations.

Budget Established



Base: Baby Boomers Evaluating a Trip (n=573)



Base: Baby Boomers Evaluating a Trip and Have a Budget (n=242)

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?

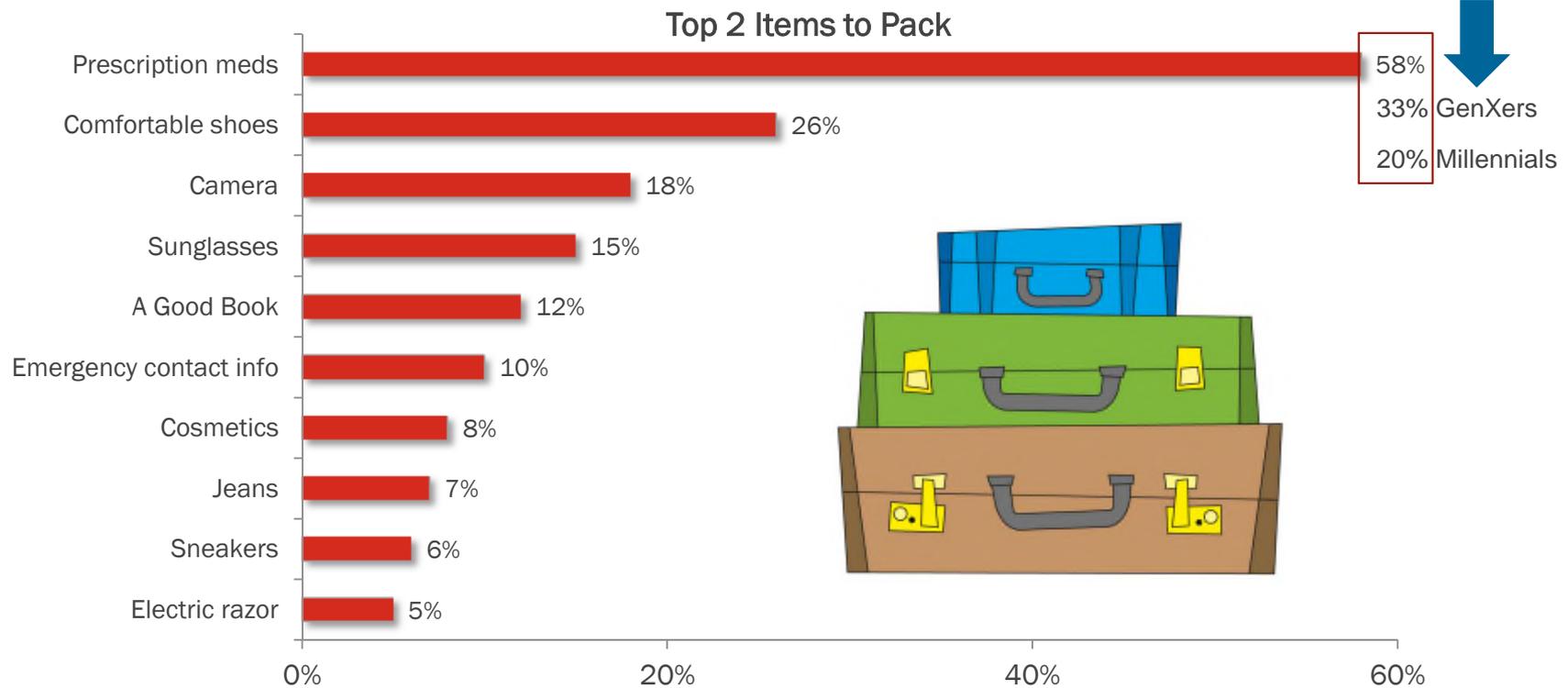
New question 2016 Travel

DETAILED FINDINGS: GENERAL TRAVEL BEHAVIORS

What to Pack: Must Have Items

- For Baby Boomers, the most important items on any trip include **meds**, **comfortable shoes**, a **camera**, and **sunglasses**.
- Beyond meds, the differences by generation are minor; the Baby Boomers are more old school and will bring a **good book** and **emergency numbers** more so than their younger counterparts (5% and 4%, respectively), whereas the Millennials are more apt to say jeans (12%), flip flops (8%), as well as a host of personal items (cosmetics, flat iron, etc.) more so than are Baby Boomers.

Top 4 items to pack did not change from 2015 to 2016.

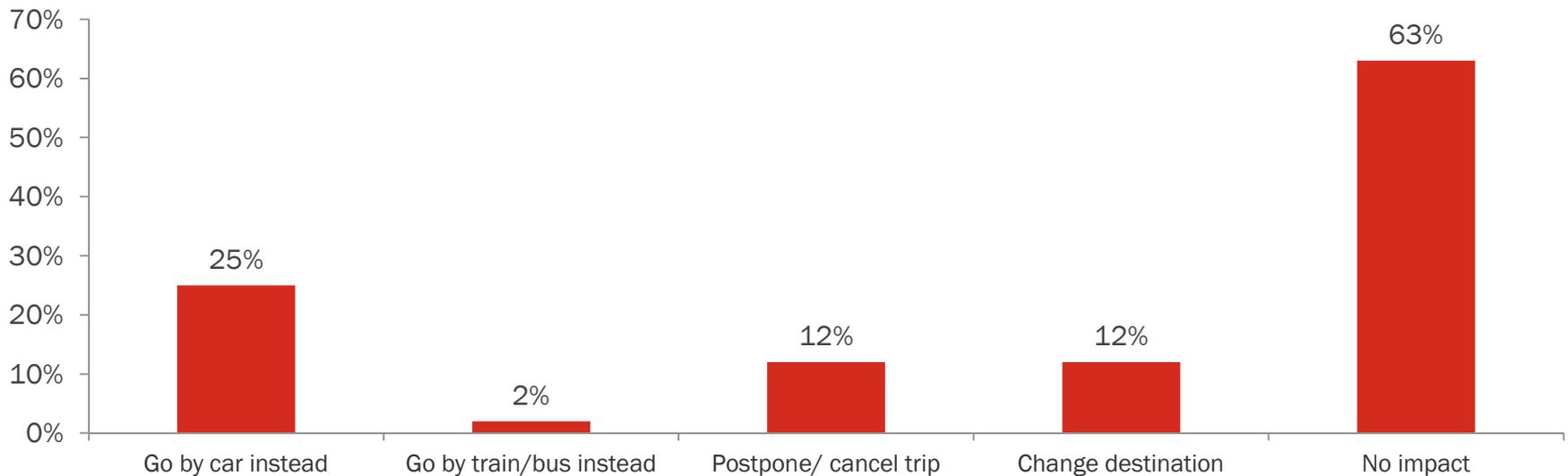


Base: 2016 Baby Boomer Travelers (n=888)
 Q19: Now, beyond credit cards, electronic/mobile devices and their chargers, what are the next 2 most important things you take on every trip?

Impact of Increased Airfares

- The majority of Baby Boomers indicate higher airfares have not impacted their personal travel plans.
- Both Millennials and GenXers are more likely than Baby Boomers to have been impacted (37% and 43% cite no impact, respectively).

Adjustments Made Due to Air Travel Prices



Base: 2016 Baby Boomer Travelers (n=888)

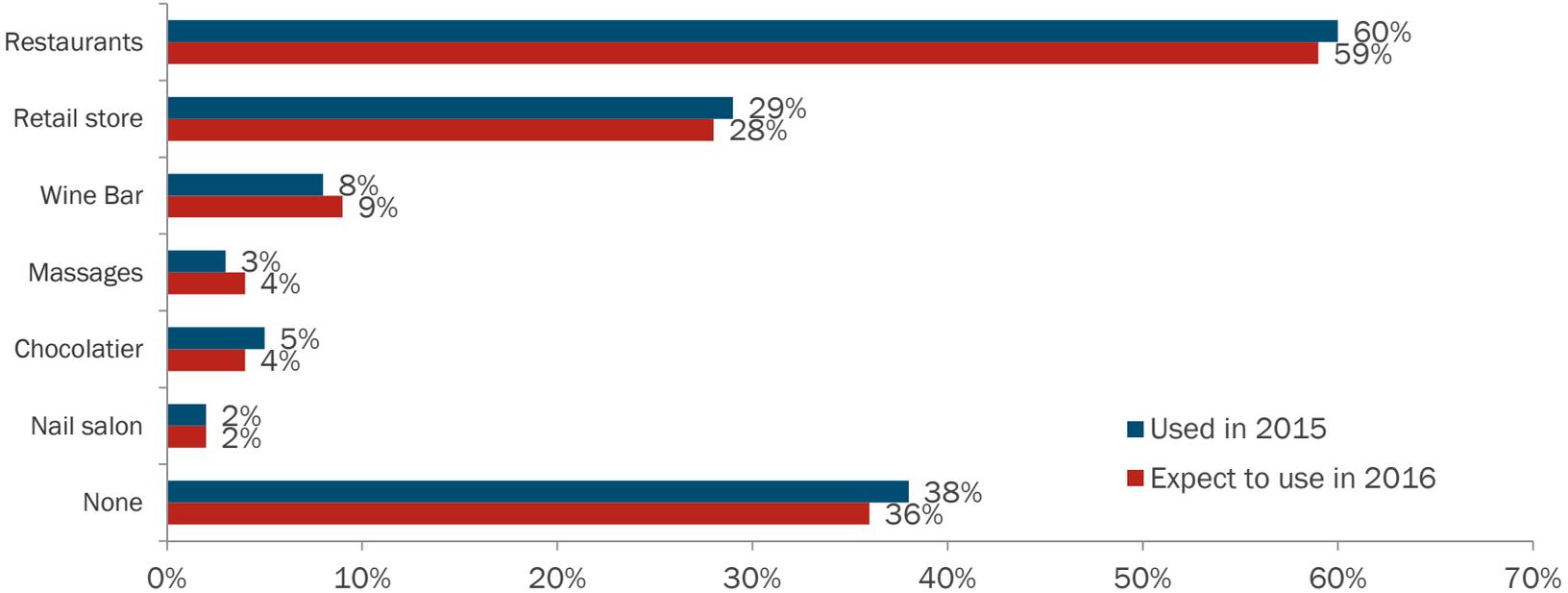
Q5e: In which of the following ways have increased airline fares impacted your travel plans?

New question 2016 Travel

Airport Amenities

- Restaurants are the most commonly used amenity in airports in 2015. Only one in three shop at a retail store with far less partaking in any of the other amenities. Boomers are the least likely of the generations to make any stops in airports (28% and 27% 'None,' Mil. and GenX).
- While Baby Boomers show no anticipated change in their use of airport amenities in 2016, Wine Bars and Nail Salons show the most potential for Millennials. (See Slide 55 in Appendix)

Actual & Expected Use of Airport Amenities



[New question 2016 Travel](#)

Base: 2016 Baby Boomer Travelers (n=888)
 Q5g: Reviewing the list of hospitality services now offered by airports, please indicate those you have taken advantage of in 2015 and those you plan on taking advantage of in 2016.

Hotel Amenities

- Of the various hotel amenities tested, Free Wi-Fi is becoming table-stakes, regardless of age.
- Offering a complimentary breakfast can be a competitive advantage for Baby Boomers.
- Smartphone key access and mobile check-in are the least important, at this time.

Importance Hotel Perks



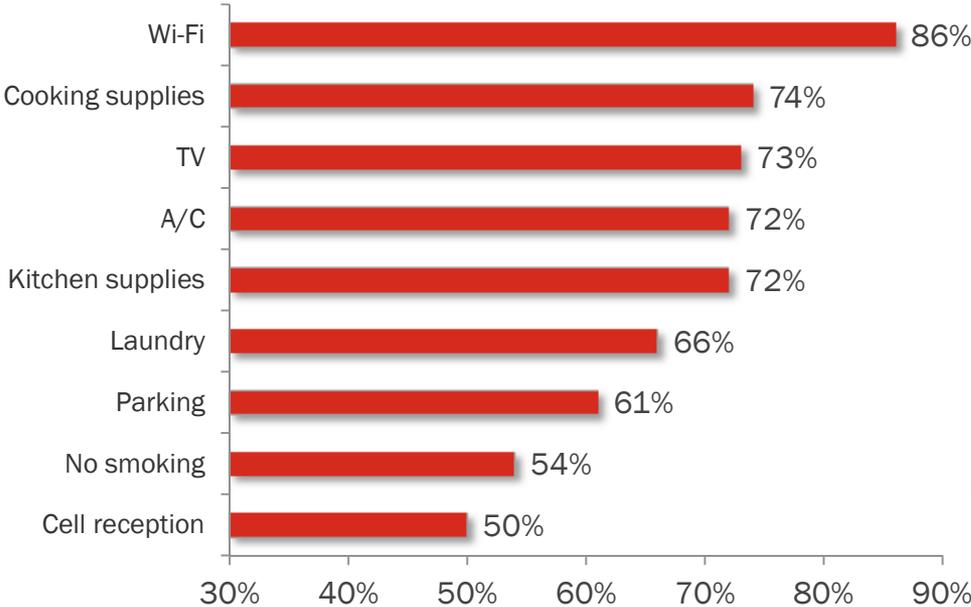
Base: 2016 Baby Boomer Travelers (n=888)
 Q5: Please indicate to what degree each of the following customer perks impacts your choice of hotels.

New question 2016 Travel

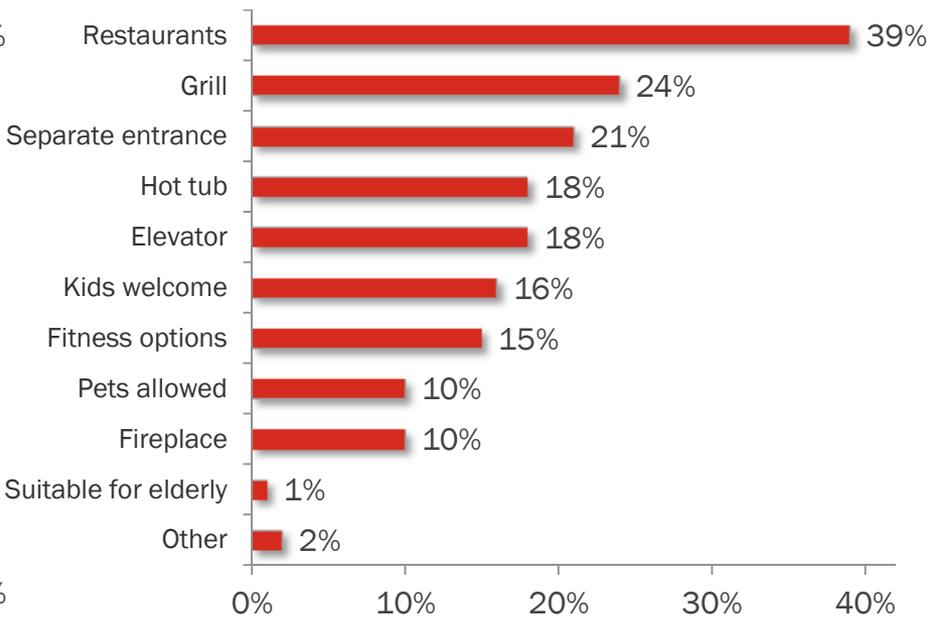
Rental Home Amenities

- Expectations for Rental Homes really come down to the basics, with the need to be connected (Wi-Fi) rated the highest.
- The needs do not vary much by generation, although hot tubs and fitness facilities do not appear to be a big draw for Millennials (0%; caution, low base sizes).

Of Greatest Importance



Of Lesser Importance



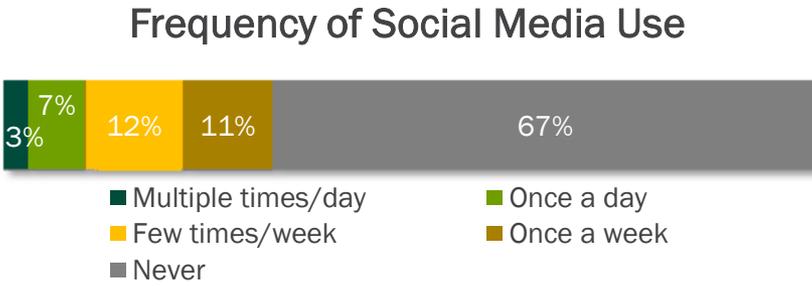
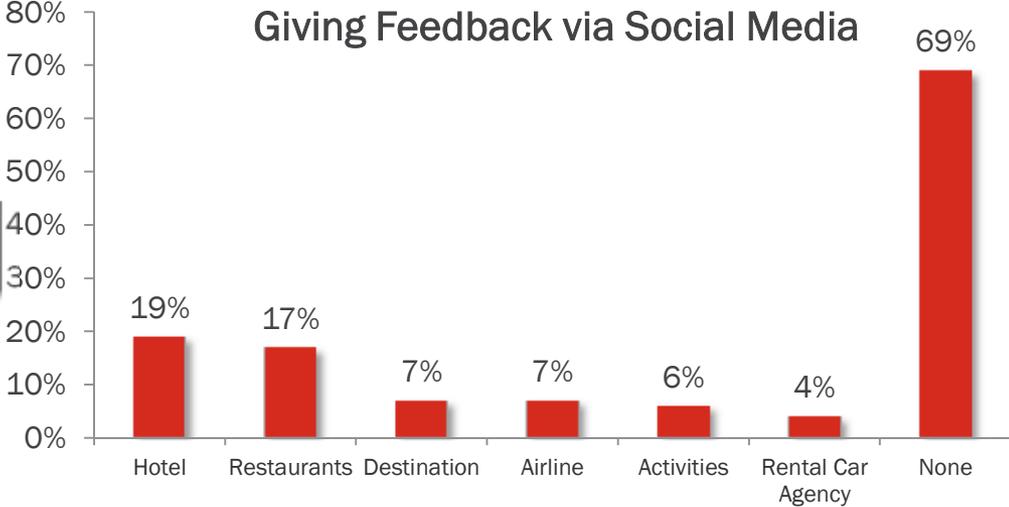
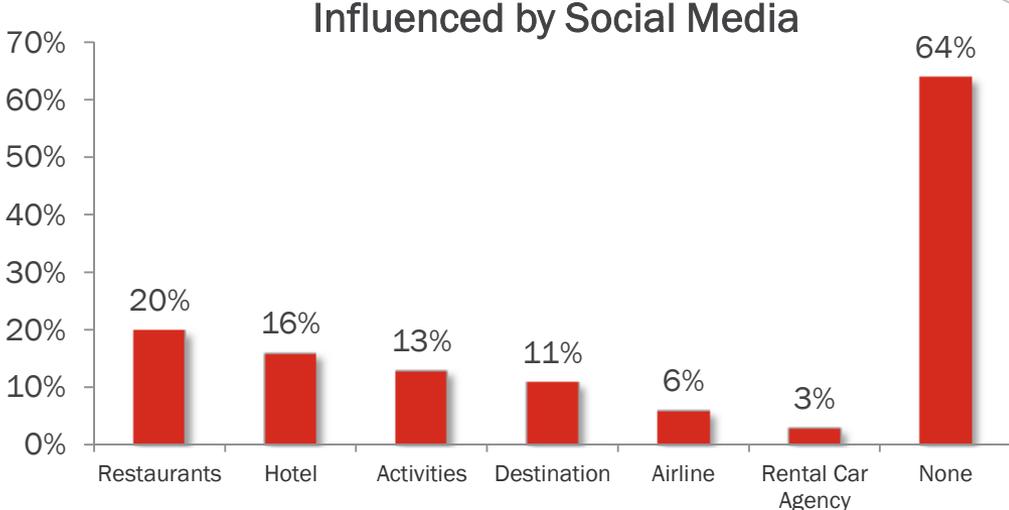
Base: Baby Boomers Renting a Home from Company/Airbnb/VRBO (n=56)

Q10c: When selecting a rental home from an owner (or an Airbnb, VRBO rental, etc.), what amenities/services are must have's for you?

New question 2016 Travel

Impact of Social Media

- Since Baby Boomers are not frequent users of social media, it is not surprising that their travel specifics are not influenced by such sites, nor do they take the time to provide their feedback (positive or negative) on such platforms.
- Younger travelers do use social media to a greater degree than Baby Boomers, with Hotels and Restaurants being the biggest recipients of feedback (~30%). (See Slide 58 in Appendix)



Base: Baby Boomers Evaluating a Trip (n=573)

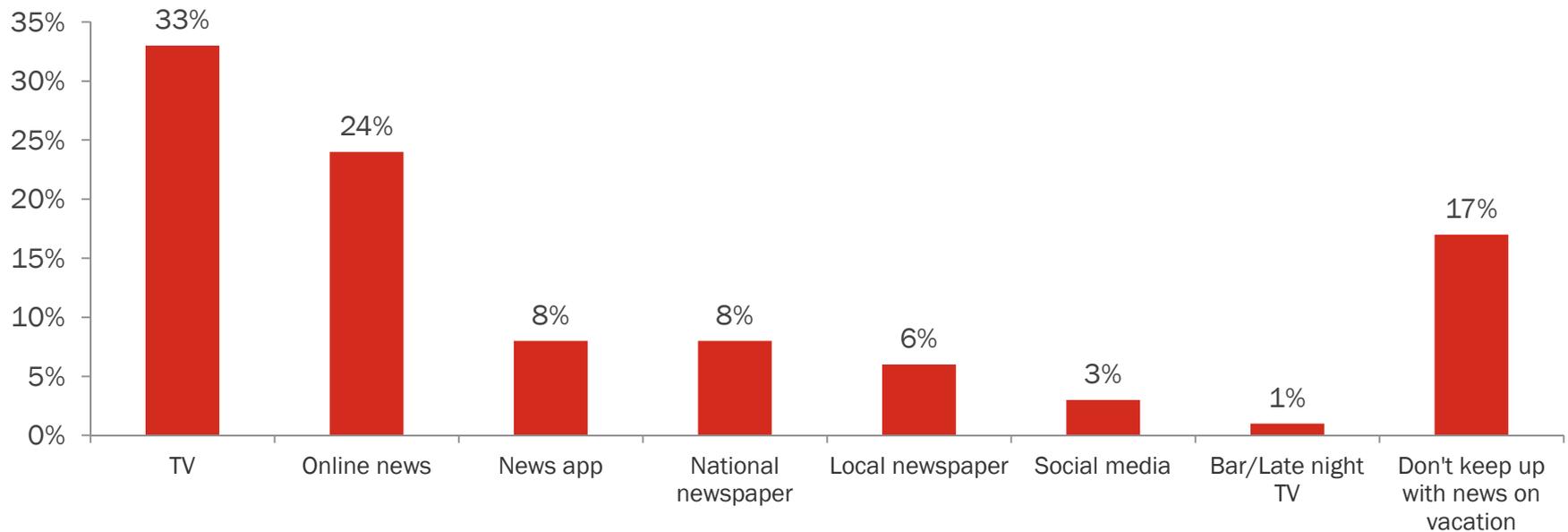
Q15a: Which aspects of your trip are significantly influenced by what is posted on social media sites?
 Q15b: Which aspects of your trip have you ever used social media to compliment or complain about?
 Q15c: On average, how frequently do you post to your social media sites while on vacation?

New question 2016 Travel

Staying Connected – News Resources

- Less than one in five Baby Boomers totally check out while on vacation. Those who stay on top of current news will turn to TV or online sources to get their fill.
- Millennials are far more likely to utilize social media (25%) to get their news than are older travelers.

News Media Outlets Used on Vacation



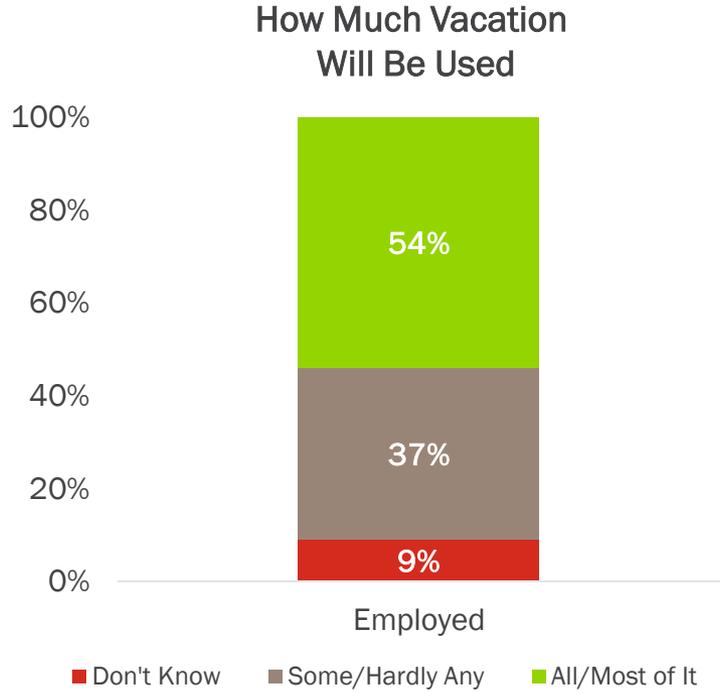
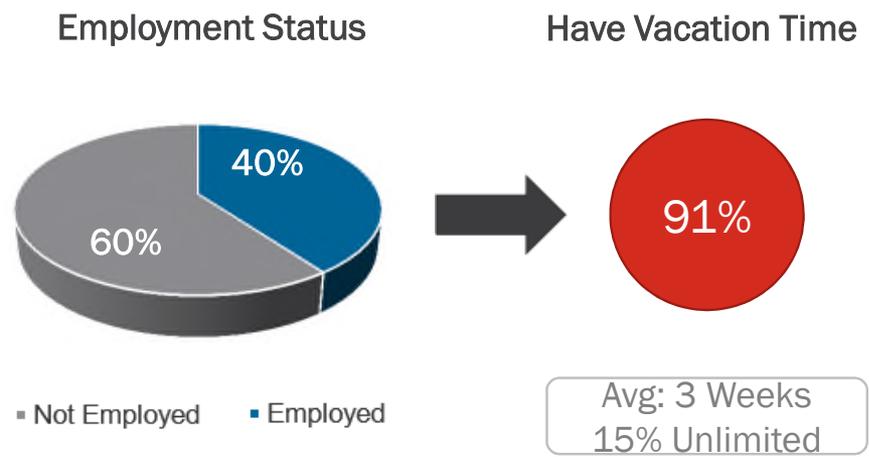
Base: Baby Boomers Evaluating a Trip (n=573)

Q15d: What is your favorite way to stay up on the most recent news while on vacation?

New question 2016 Travel

Work and Travel in 2016

- The majority of working Baby Boomers have vacation for 2016, however, only half (54%) will use All or Most of it for personal travel.



Base: 2016 Baby Boomer Travelers (n=888)
 QS6a: Which of the following best describes your current employment status?

Base: Employed Baby Boomers (n=358)
 Q16a: Approximately, how much vacation time/paid time off will you have in 2016?

Base: Baby Boomers with Paid Time Off (n=327)
 Q16b: How much of your paid vacation time will you use for personal travel in 2016?

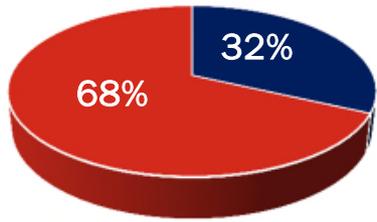
No significant difference 2015 vs. 2016.

Work and Travel in 2016

- Most Baby Boomers who work do not feel compelled to work while on vacation.

- That said four out of ten say it is important to stay connected to work while traveling, regardless of age.

Likelihood to Bring Work



■ Not Likely ■ Likely

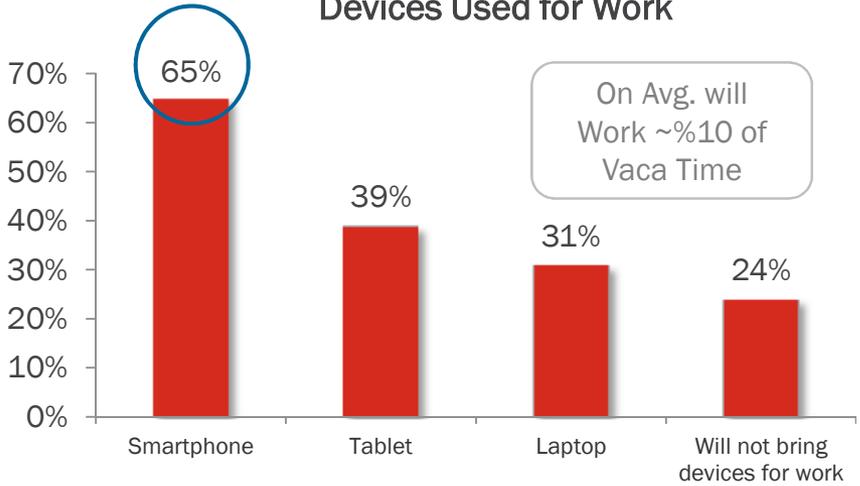
- GenXers are the most likely (36%) to work while on vacation and are more likely than Millennials to use a Tablet to do so (41% vs.31%).

Importance of Staying Connected To Work



■ Extremely/Very Important ■ Somewhat Important ■ Not Important

Devices Used for Work



Base: Baby Boomers with Paid Time Off (n=327)
 Q16c: When you take vacation time from work in 2016, how likely are you to bring work with you while on vacation?
 Q17: In your opinion, how important is it for you to stay connected to work when you are on personal travel?
 Q17_1: Which devices do you anticipate bringing with you on vacation in 2016 to specifically connect to work or complete work while on vacation?
 Q17b: If you had to guess, what percent of your time do you spend on work-related stuff? Base: Baby Boomers Likely To Work (n=104)

No significant difference 2015 vs. 2016.
 Q17_1: new question 2016 Travel

Type of Vacation With No Work

- There are certain types of trips that allow travelers to fully disconnect from work, these include beach destinations or cruises, international travel or just getting out in the great outdoors.



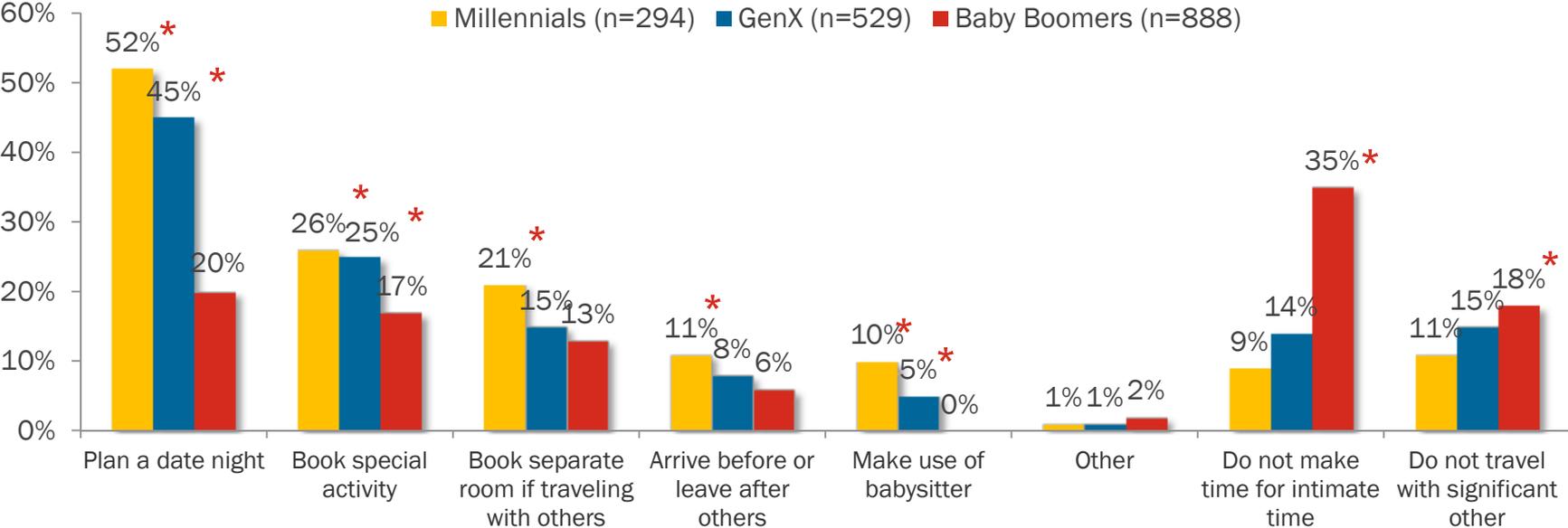
Base: Baby Boomers with Paid Time Off (n=327)

Q17c: Please describe the type of vacation you take where you are able to fully disconnect from work.

How to Keep it Intimate

- Baby Boomers are far less focused on intimacy than are their younger counterparts.
- For all, planning a date night seems to be the most common way to find quality time with your significant other while on vacation.

Romantic Time by Generation



* Denotes a significant difference between generations

New question 2016 Travel

Base: 2016 Travelers (n=1711)
 Q20b: What type of activities or accommodations do you make or plan to make in order to spend more intimate/romantic time with your significant other?

Traveling and Pets

- Of the 55% of Baby Boomers who have pets, only 5% take them on all of their personal travels; most do not travel with them.
 - Millennials (10%) are more likely than GenXers (4%) and Baby Boomers to bring their pet “all of the time.”
- Dogs are the most common pet to be taken along on trips.

Frequency of Traveling with a Pet



Base: 2016 Baby Boomers Travelers with a Pet (n=472)

Pets that Travel



91%



11%

Base: 2016 Baby Boomers Who Travel With Pets (n=131)

Q18: How often do you travel with pets?
Q18b: What type of pet(s) do you travel with?

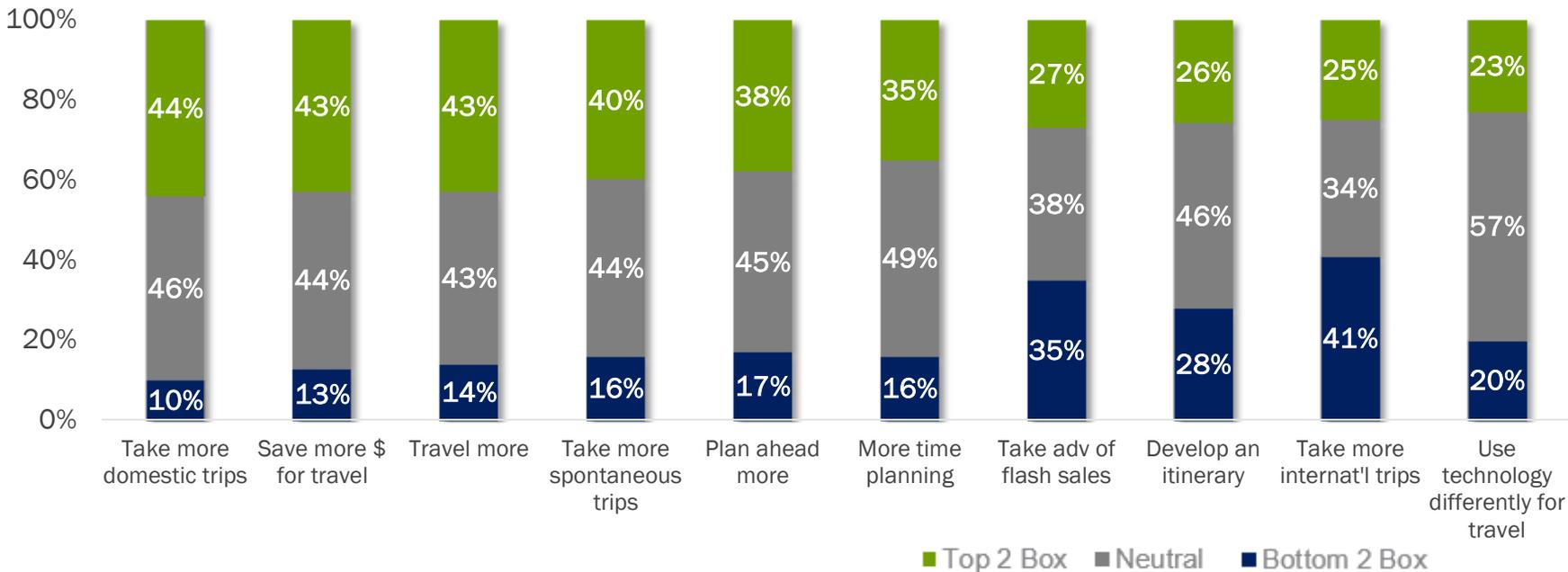
New question 2016 Travel

2016 Travel vs. 2015 Travel: What Will be Different

- A large portion of the Baby Boomer travel audience indicates they do not plan on doing many things differently in 2016 compared to 2015.
- The general consensus appears they would like to travel more, specifically domestically.

Last year, Boomer Travelers were more likely to anticipate saving money (51%) and traveling more (48%) compared to their expectations this year for 2016 travel.

Degree of Agreement in Change in Travel Behaviors; 2015 to 2016

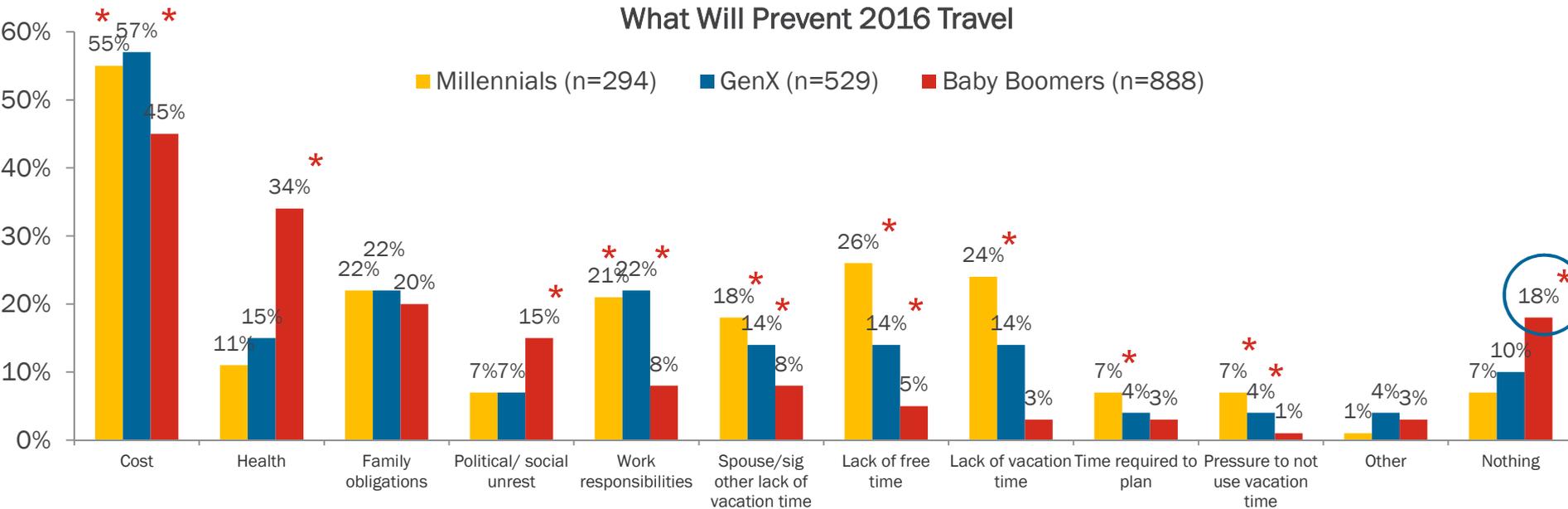


Base: 2016 Baby Boomer Travelers (n=888)
 Q21: Compared to my personal travel in 2015, in 2016 I will.....

Other Barriers to Travel in 2016

- Regardless of age, cost is the predominant barrier to leisure travel.
- Baby Boomers are also concerned about health whereas the younger generations are more concerned about family and work responsibilities.
- Millennials are the most likely to cite 'a lack of time' as a barrier to travel.

Barriers seemed to have softened some for Boomers with Cost (51%), Family Obligations (27%), Work (14%), Lack of Time (17%) being mentioned by more travelers in 2015 than reported in 2016.



Base: 2016 Travelers (n=1711)

Q22: What, if anything, has prevented you or might prevent you from taking all of the personal trips you'd like to take in 2016?

* Denotes a significant difference between generations

Saving Money on Vacation

Food
24%

"Eat on the ship; bring snacks for the plane."

"Breakfast & lunch in hotel room."

"Pack a cooler bag with drinks and a bag with snack foods for car ride."

"Not eating out so much."

Transportation
17%

"Local public transportation."

"Drive personal vehicle."

"Carpool to destination."

"Book plane tickets when there is a sale."

Price Shopping
15%

"Book as a group."

"Use different travel sites."

"I budget an amount and I do not go over it. I don't take the trip if it is clear I will exceed it."

Lodging
13%

"Stay with friends/family."

"Stay in apartments rather than hotel."

"I try and book hotel stays where a discount is being offered or try to stay during an inexpensive time of year."

Rewards/Perks
13%

"Use airline mileage for air fare."

"Included breakfast with hotel."

"Use accumulated points when appropriate for airline/hotel. Booking early."

Base: Baby Boomers Evaluating a Trip (n=573)

Q14c. Thinking about both the major aspects of travel (transportation and accommodations) and the spending while away (eating and entertainment) what are your "go-to" ways to save money on travel?

APPENDIX

Methodology

- A 10-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 having an intent to travel for personal pleasure (non-business travel) in 2016.
- The survey was in field from September 17- 28, 2015
- A total on n=1,711 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	1711
Age	
18-44	514
45-49	288
50-59	308
60-69	307
70+	294
Gender	
Female	893
Male	818
Race	
Caucasian/Other	1019
African American	286
Hispanic	264
Asian American	142
Region	
West	399
South	646
Midwest	356
Northeast	310

Counts by Age Segment

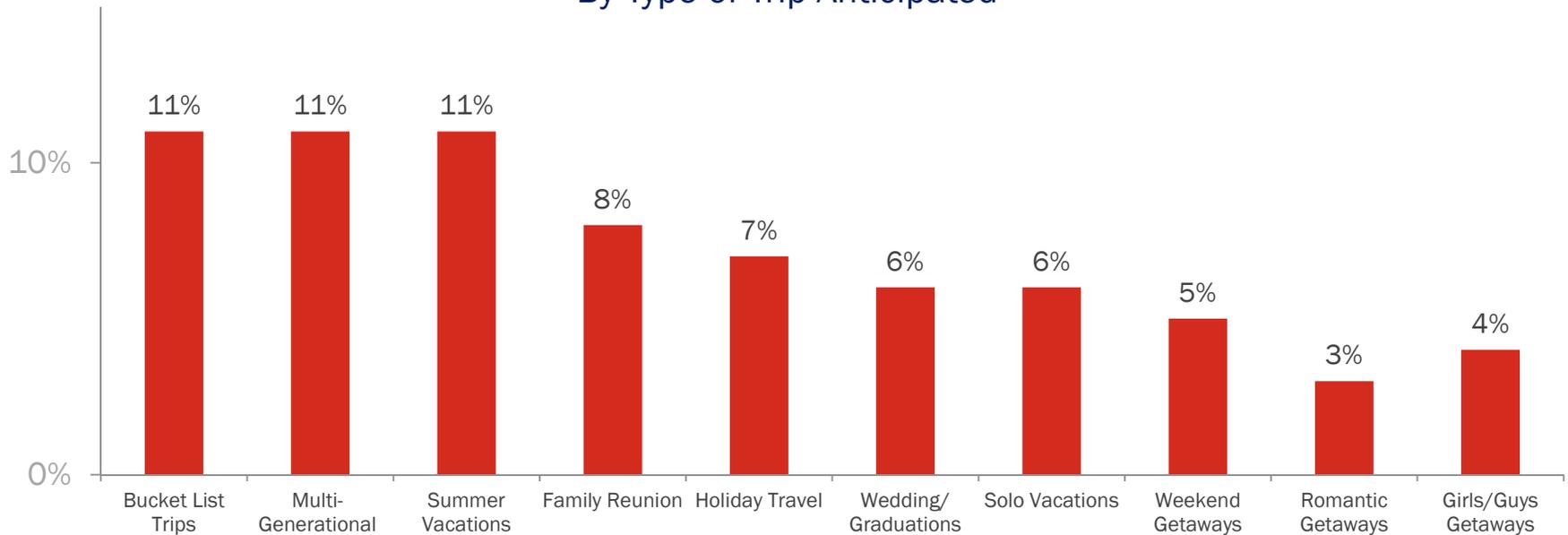
- The focus of this analysis is among Baby Boomers (adults age 50+) who intend to travel in 2016.
- Millennials (age 18-34) and Gen X respondents (age 35-50) have also been evaluated to compare and contrast travel behaviors for 2016.
- Counts by generations are as follows, weighted.

	Millennials	GenX	Baby Boomers
Total	294	529	888
Age			
18-34	294		
35-50		529	
51+			888
Gender			
Female	161	275	470
Male	133	254	418
Race			
Caucasian/Other	187	343	682
African American	34	68	88
Hispanic	54	86	83
Asian American	19	32	35
Region			
West	68	120	204
South	100	200	329
Midwest	67	117	195
Northeast	59	92	160

Trips Chosen for Evaluation

- All trips types, to the magnitude in which they exist in data, are represented in the detailed trip questions.

Trips Evaluated
By Type of Trip Anticipated

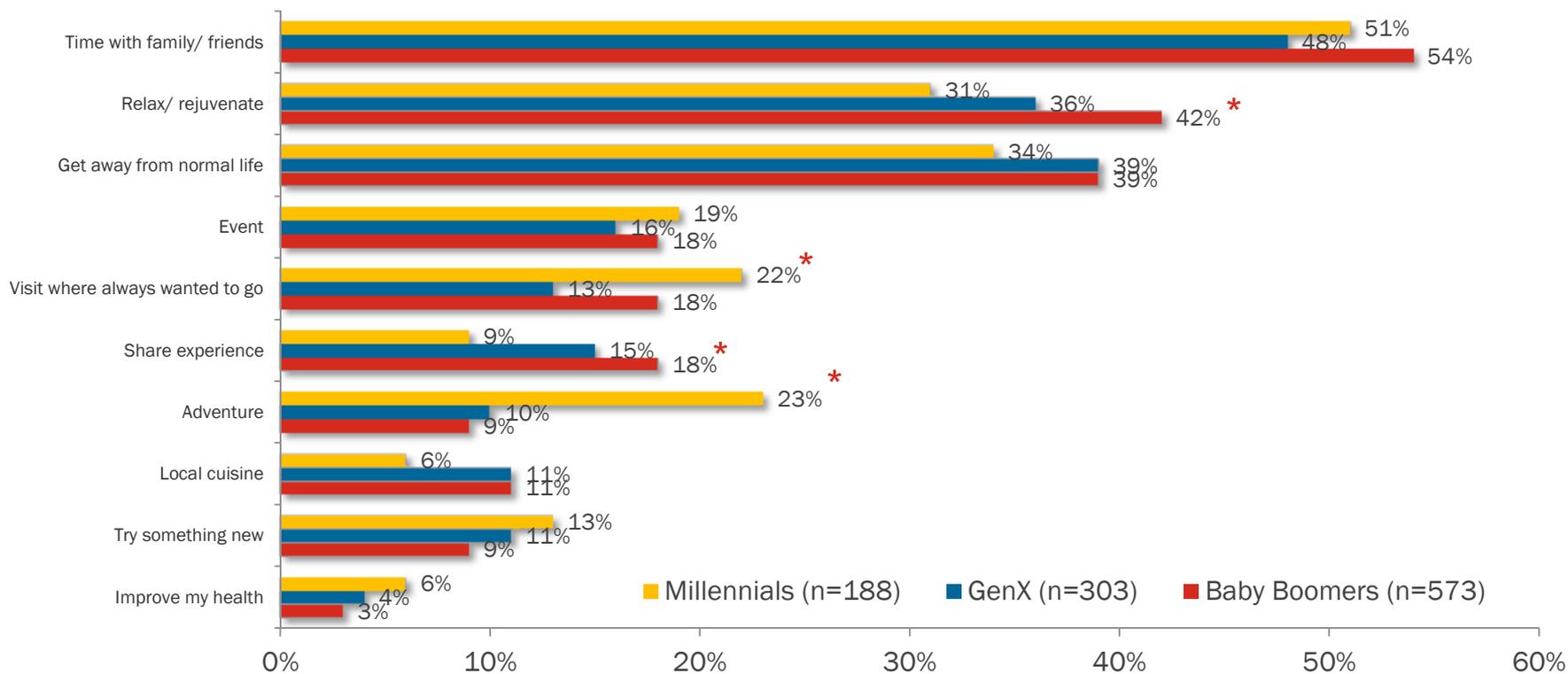


Base: Baby Boomers Evaluating a Trip (n=574); Trip is randomly selected as long as a destination has been chosen.

Top Motivators for Travel

- The top 3 motivators are the same, regardless of age. However, different triggers do surface among the top 10 motivators, specifically when comparing Millennials to Baby Boomers.

Top 10 Trip Motivators



Base: 2016 Travelers Evaluating a Trip (n=1064)

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

* Denotes a significant difference between generations

What's Different on Vacation

- Comparing vacation behaviors by generation; those <51 will tend to smile/laugh, reflect, sleep, and dream more while on vacation than when they are at home.

What they DO MORE OF while on Vacation

Millennials (a) (n=294)		Generation X (b) (n=529)		Baby Boomers (c) (n=888)	
Smile/Laugh	78% c	Smile/Laugh	78% c	Smile/Laugh	68%
Time with friends/family	69% c	Time with friends/family	66%	Time with friends/family	61%
Learn something new	60%	Learn something new	60%	Learn something new	63%
Reflect	52% c	Reflect	59% c	Reflect	39%
Read	33%	Read	35%	Read	34%
Sleep	38% c	Sleep	37% c	Sleep	22%
Dream	33% c	Dream	32% c	Dream	17%
Exercise	25%	Exercise	24%	Exercise	21%
Eat healthy	12%	Eat healthy	9%	Eat healthy	10%

Base: 2016 Travelers (n=1711)

Q20a: When on vacation, do you find that you do the following more, less or about the same compared to your everyday habits?

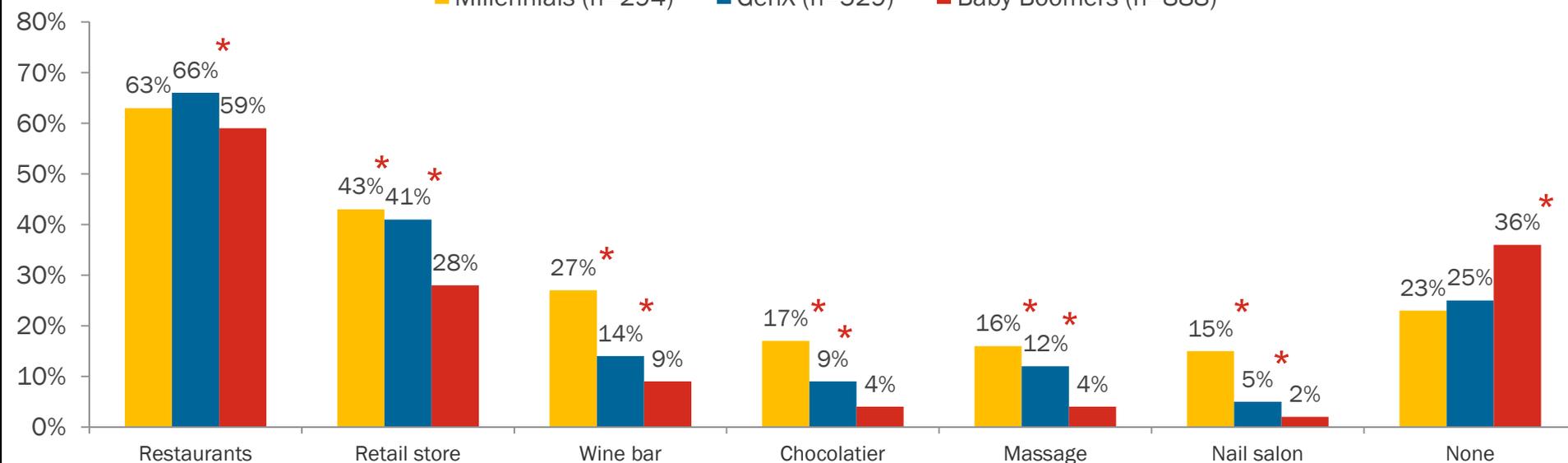
Letters denote a significant difference between generations

Airport Amenities

- Millennials express higher levels of intent for the various airport amenities tested compared to GenXers and Baby Boomers.

Expected Use of Airport Amenities

■ Millennials (n=294) ■ GenX (n=529) ■ Baby Boomers (n=888)



* Denotes a significant difference between generations

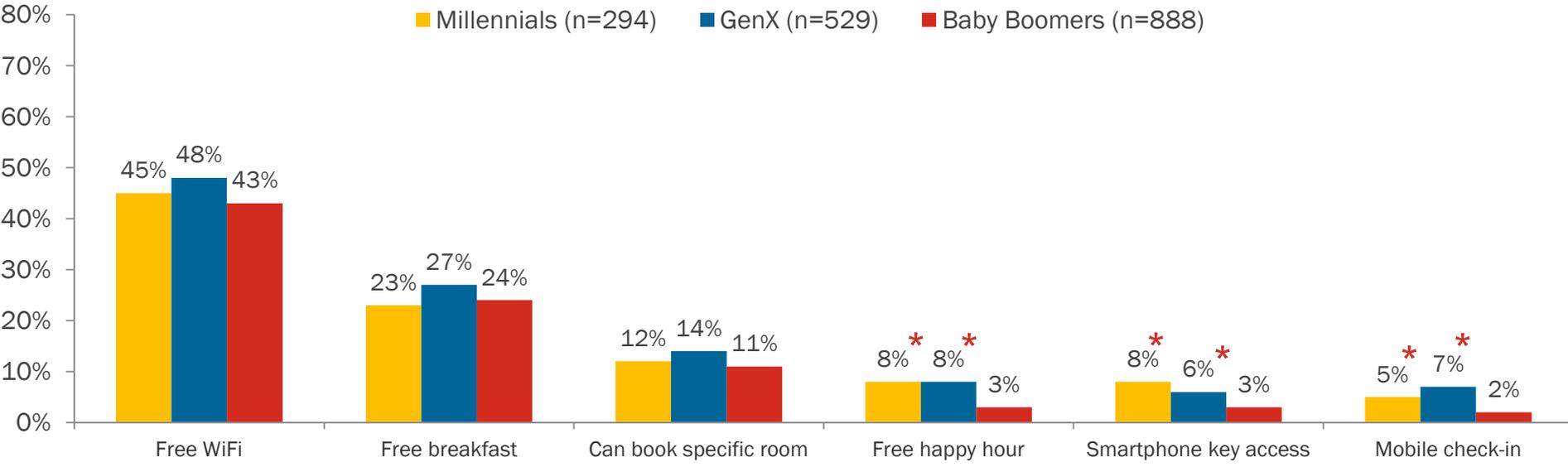
Base: 2016 Travelers (n=1711)

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

Hotel Amenities

- Although it is a small portion of total leisure travelers, there are some Millennials and GenXers that indicate free happy hour and mobile apps (keys and check-in) are a must for them to consider staying at a specific hotel.

Hotel Perks: “Have to Have”



* Denotes a significant difference between generations

Base: 2016 Travelers (n=1711)
 Q5f: Please indicate to what degree each of the following customer perks impacts your choice of hotels.

Impact of Social Media

- Millennials are the most likely of the generations to get input from social media outlets while planning the details of their trip. They are also significantly more likely to give feedback based on their travel experiences, via social media, than are their older counterparts.

Influenced by Social Media

Giving Feedback via Social Media

	Millennials (a)	GenX (b)	Baby Boomers (c)	Millennials (a)	GenX (b)	Baby Boomers (c)
<i>Base:</i>	(188)	(303)	(573)	(188)	(303)	(573)
Restaurants	37% c	29% c	20%	26% c	23%	17%
Activities	35% bc	22% c	13%	15% c	12% c	6%
Hotel	27% c	20%	16%	32% c	26% c	19%
Destination	25% c	17%	11%	13% c	7%	7%
Airline	19% bc	9%	6%	22% bc	11%	7%
Rental Car Agency	11% c	8% c	3%	7%	6%	4%
None	31%	49% a	64% ab	41%	54% a	69% ab

Base: Travelers Evaluating a Trip

Q15a: Which aspects of your trip are significantly influenced by what is posted on social media sites?

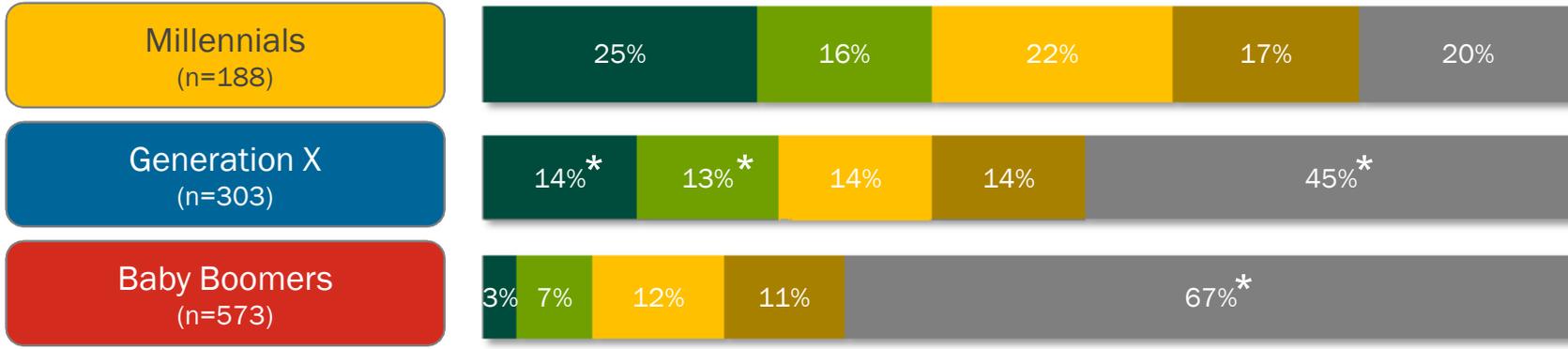
Q15b: Which aspects of your trip have you ever used social media to compliment or complain about?

Letters denote a significant difference between generations

Engagement with Social Media

- Levels of social media engagement increase significantly as the age of the traveler decreases.
- And, despite the popularity of Facebook, the majority of Baby Boomers are not posting anything online while on vacation.

Frequency of Social Media Use



* Denotes a significant difference between generations

Base: Total Travelers Evaluating a Trip

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

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and

