

The State of the American Traveler™

MOBILE EDITION

Fall 2017 | Volume 26



Destination  Analysts

The Mobile Edition

THIS FALL EDITION of *The State of the American Traveler*™ explores travelers' use of mobile devices in planning and executing their trips. As always, we start with an examination of how American travelers are feeling about the near-term future, and the story continues to be very positive. Travelers are currently showing record levels of optimism for travel in the next year. In this issue we introduce our Mobile Addiction Test, which shows that over the past three years, leisure travelers

have grown increasingly attached to these highly engaging devices. Despite this increasing dependence, travelers still heavily rely on (and actually prefer) more traditional laptop or desktop devices for their travel planning needs. Please enjoy this edition. As always, if you have questions or ideas for future survey topics, we welcome you to message us.

info@destinationanalysts.com
or @DA_Research.






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Methodology

THE STATE OF THE AMERICAN TRAVELER SURVEY™ is conducted quarterly by Destination Analysts, Inc., a San Francisco-based tourism industry research company. The survey is conducted online amongst a nationally representative sample of adult Americans. From October 1st to the 7th, 2017, surveys were collected from a group of respondents who were then screened for their leisure travel behavior. Only those respondents who had traveled at least once in the past 12 months for purely leisure or personal reasons were interviewed. This travel must have been of at least 50 miles one-way — the standard distance threshold used in the tourism industry to signify that a “trip” has been taken.

In total, 2,006 leisure travelers completed the survey. With this sample size, the top line data presented here can be considered to have a reliability of +/- 2.2%. This information is provided “as is” and intended for informational purposes only. It should not be relied upon for operational, marketing, legal, technical, tax, financial or other advice. Destination Analysts is not responsible for your use of the information contained herein (including errors, omissions, inaccuracy or non-timeliness of any kind) or any assumptions or conclusions you might draw from its use.

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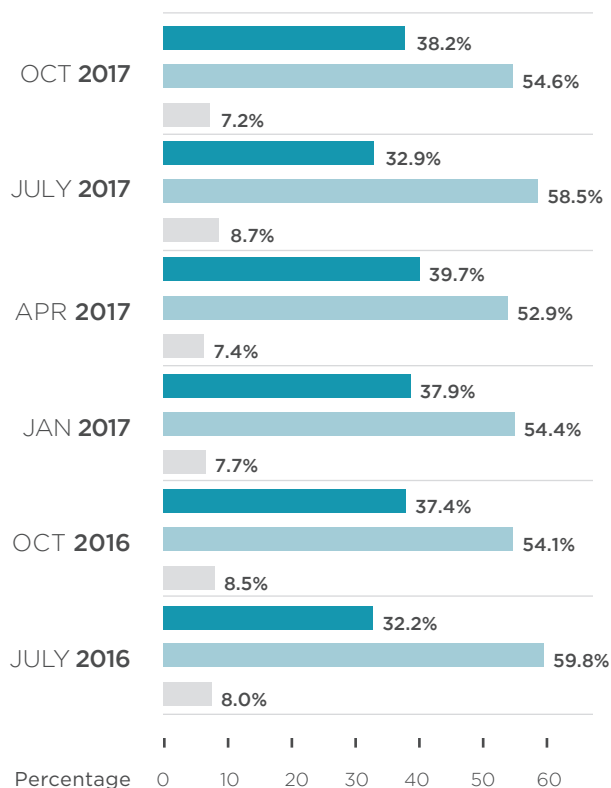
1 Travel Expectations: Trips & Spending

IN RECENT YEARS, the leisure travel expectations of Americans have been robust. Findings from our quarterly national tracking survey indicate

a continuation of this optimism: in October 2017, 38.2 percent of Americans said they expect to travel more for leisure in the upcoming year, up from 37.4 percent one year ago. Expectations for travel spending are similarly buoyant: 35.8 percent of Americans intend to increase their leisure travel spending in 2018.

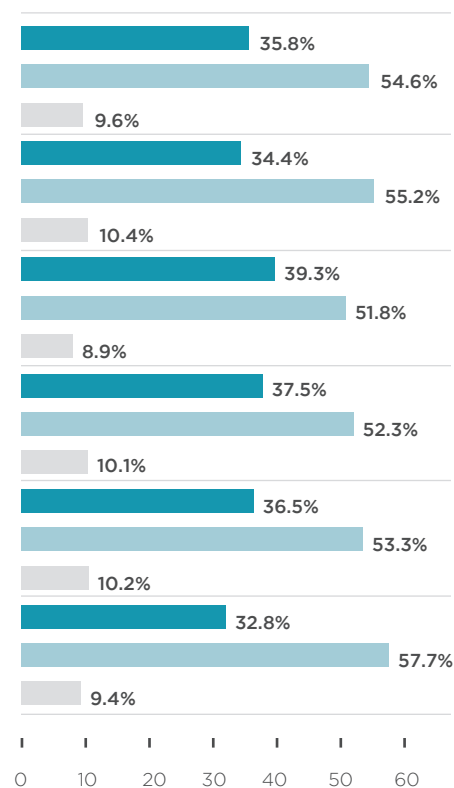
THE KEY: ■ expect more ■ expect the same ■ expect less

Travel Expectations (Trips)



Q: In the next 12 months, do you expect to travel more or less for leisure than you did in the most recent 12 month period?

Travel Expectations (Spending)



Q: In the next 12 months, do you expect to spend more or less on leisure travel than you did in the most recent 12 month period?

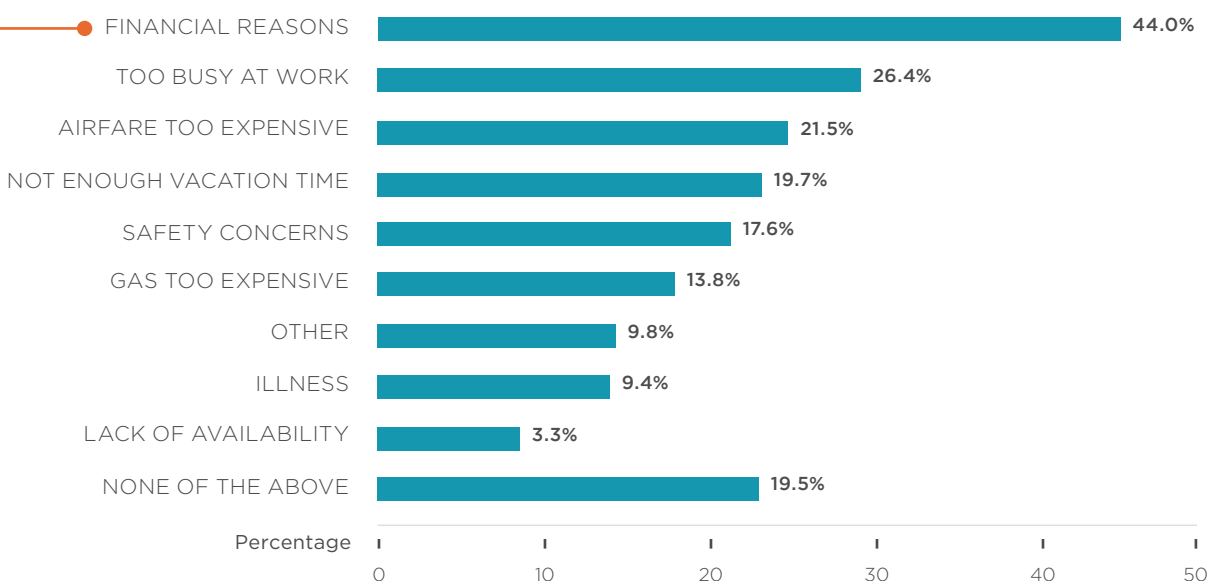
2 Travel Impediments

Travelers report that their personal finances are the most important factor constraining their leisure travels, and the limitation they put on leisure markets has been growing this year. In our most recent survey, almost half (44.0%) of American leisure travelers reported that “personal financial reasons” had kept them at home, to some degree, during the past year. Workplace demands

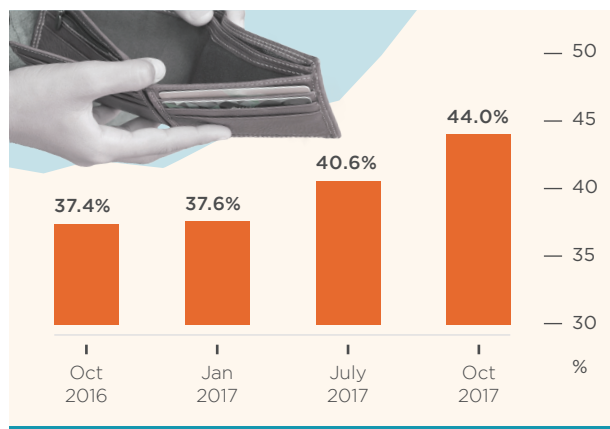
also play a major inhibitory role. More than one third of Americans said that either being “too busy at work” (26.4%) or “not having enough vacation time” (19.7%) kept them at home. Travel prices also had an impact. Over 30 percent of travelers reported that gasoline (13.8%) or airfare (21.5%) being too expensive kept them at home during the past year.

Travel Impediments

Q : In the past 12 months, which (if any) of the following kept you from traveling more for leisure than you would have otherwise preferred?



Personal Financial Concerns Re-Emerge



Personal Financial Concerns by Survey Cycle

44% of American leisure travelers said personal finances kept them from traveling more in the past year

Despite the elevated levels of traveler enthusiasm seen in this survey, financial-related impediments to travel are once again becoming more pronounced. While concerns over personal finances had been declining in recent years, the turnaround in 2017 is concerning. It may be too early to raise a warning flag, but we suggest keeping an eye on this as the new year progresses.

3.1

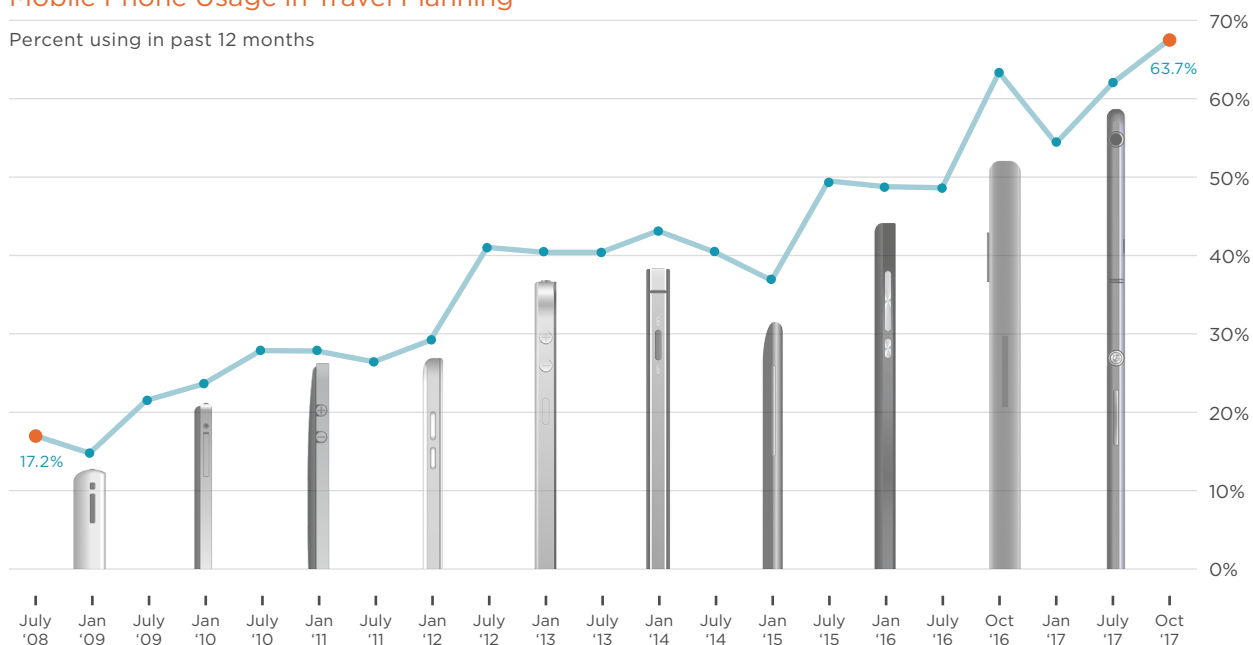
Going Mobile: Phones & Travel Planning

Mobile phones have become ubiquitous features in many of our lives, and their use in travel planning has also blossomed. Destination Analysts has been tracking the use of mobile devices for leisure travel planning for the last 11 years. In 2008, about a year and a half after Steve Jobs

announced the first iPhone, fewer than one in five (17.2%) of travelers used them to help plan their leisure trips. We're now in a different world, in which fully 95.8 percent of American leisure travelers own or regularly use a mobile phone, and 68.0 percent actively use this device to plan their trips.

Mobile Phone Usage in Travel Planning

Percent using in past 12 months



96% of leisure travelers own or regularly use a mobile phone



3.2

How Leisure Travel Planning is Done

Travelers who are in the early stages of their trip planning process typically need different types of information from those who are in the later stages. Picture yourself brainstorming vacation destinations at home (or on a cheeky work break), versus sitting in the airport terminal, waiting to board, and looking up the best beach bars for your welcome cocktail. The devices that travelers prefer to use throughout different stages of the travel planning process also vary, and we're

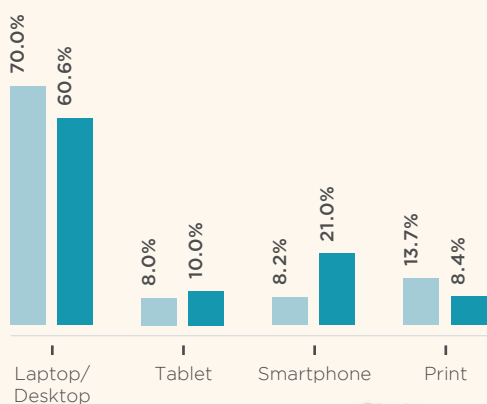
seeing an overall rise (across all stages) in research done on mobile. The laptop/desktop computer still dominates pre-departure planning, but its preeminence is falling: in 2017, travelers reported doing 60.6 percent of their pre-trip planning on a computer, compared to 70.0 percent in 2015. Conversely, the percentage of in-market planning done on mobile has more than doubled in the same period, surging from 21.3 percent to 44.2 percent in our most recent survey.

Mobile phones are becoming significantly more important in all stages of travel planning.

BEFORE THE TRIP

■ WINTER 2015 ■ SUMMER 2017

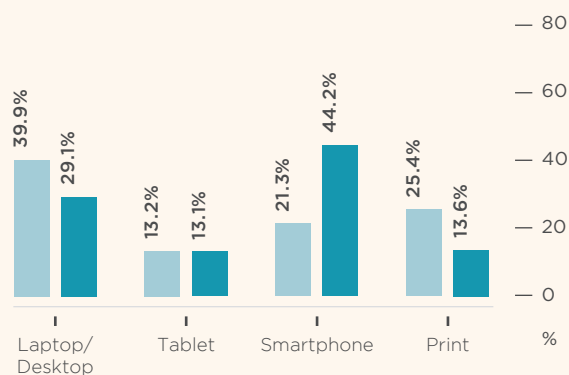
Q: What percentage of your travel planning is typically done using each of the following before you leave for your trip?



DURING THE TRIP

■ WINTER 2015 ■ SUMMER 2017

Q: What percentage of your travel planning is typically done using each of the following while on your trip?

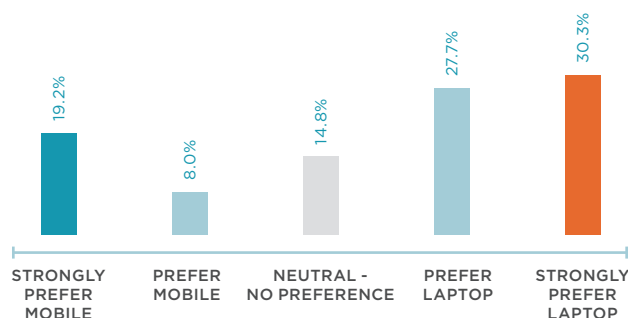


4 Desktop vs. Mobile: Planning Tools

Despite the explosive growth in mobile travel planning, most travelers still prefer to use a traditional desktop or laptop interface when planning their trips. Given a choice between the two (for conducting a variety of travel planning activities), most said they prefer laptops and desktops to their mobile device. The chart below shows this preference when travelers were asked about researching activities, attractions or events. While results were similar across planning activities, a major divide exists between older and younger generations in their preferences for mobile planning. Millennial travelers are far more likely to prefer using their mobile phones than their older traveling counterparts. Yet interestingly, Millennial preference for mobile devices has abated somewhat in

the past year-dropping from 44.6% to 36.8% expressing a general preference for using a mobile device to plan their leisure trips.

Q: If you were given the choice of using a mobile phone or a laptop computer, which would you prefer to research activities and attractions?

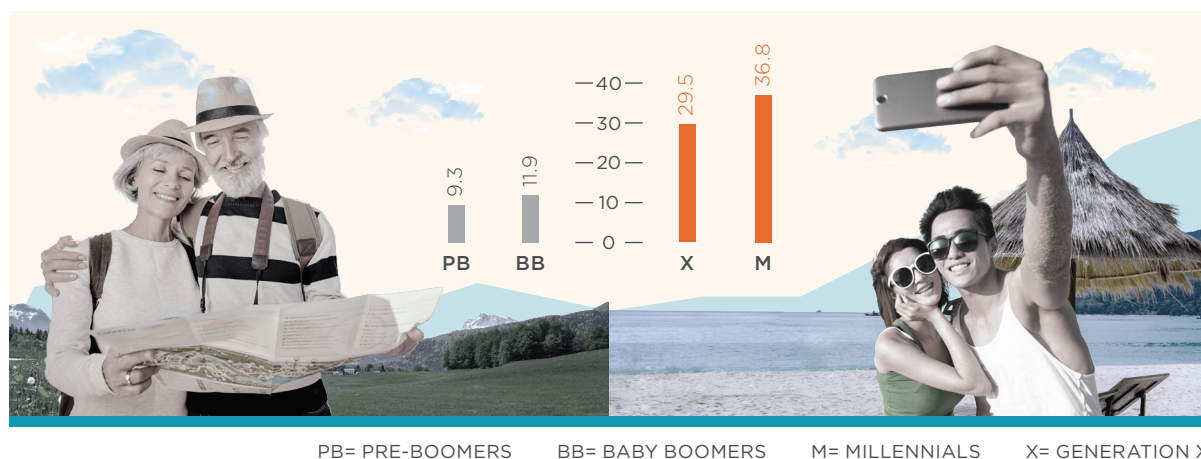


Millennials Researching Activities, Attractions or Events



PREFERENCES BY GENERATION

A major divide exists between older and younger generations in their preferences for mobile planning.



5.1

Growth in Mobile Addiction is Slowing

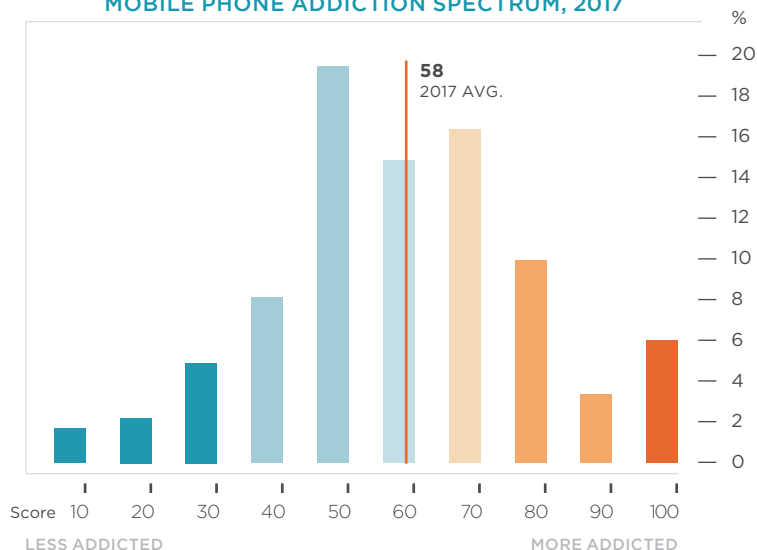
Mobile phones can be addictive, triggering the release of “feel good chemicals” like serotonin and dopamine. To track this phenomenon, we created Destination Analysts’ Mobile Addiction Index™. First conducted in January 2015, this set of behavioral and opinion tracking questions measures the importance of mobile devices to the emotional world of American travelers.

AVERAGE MOBILE ADDICTION SCORE

51 → **57** → **58**
2015 2016 2017

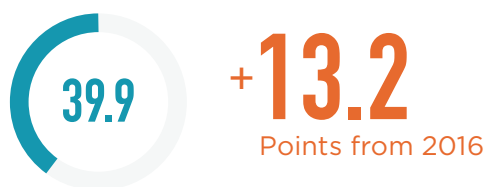
Destination Analysts’ Mobile Addiction Index™ measures a traveler’s behavioral and emotional dependency on mobile devices. Higher scores indicate higher levels of dependency. The average score of all travelers nationwide rose from 51 to 57 throughout 2015 and 2016, but growth slowed substantially in the past year. The 2017 index stands at 58.

MOBILE PHONE ADDICTION SPECTRUM, 2017

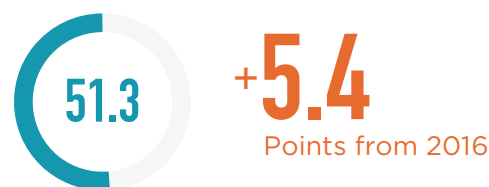


Generational Changes in Mobile Addiction Score out of 100 in the past 12 months

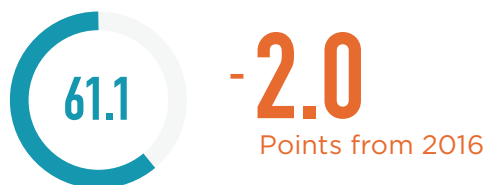
Pre-Boomers Score



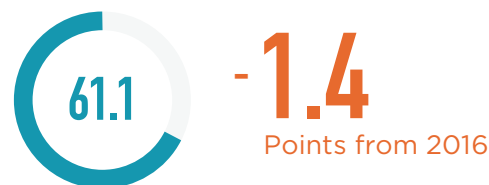
Baby Boomers Score



Generation X Score



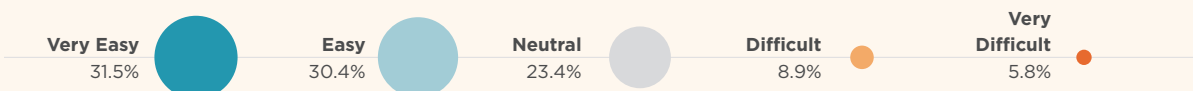
Millennials Score



5.2

Fun Facts: Travelers & Mobile Phones

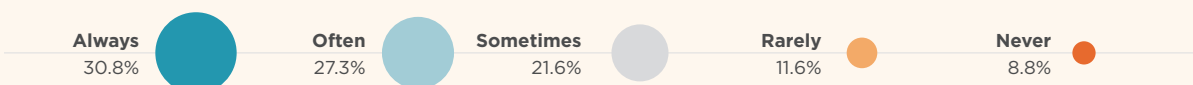
Q: In your experience, how easy is using your mobile phone to research and find travel information prior to traveling and purchasing?



Q: In general, how easy do you find using your mobile phone to purchase or book travel products and services (hotels, flights, etc.)?



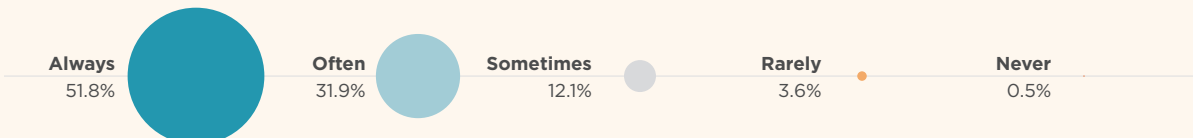
Q: In the normal course of your day, how often is your mobile phone on your person (or within easy reach)?



Q: When you are using your mobile device in the company of friends and family, how likely are you to feel guilty (even if momentarily) that you are not interacting with them?



Q: In the normal course of your day, if you become bored or momentarily have some free time, how often will you feel the urge to pick up your mobile phone to entertain yourself?



Q: You are in a social situation (e.g., a party, dinner with friends or family, a business meeting, etc.) and you receive a text or email message. How likely are you to immediately look at your mobile device to read it?



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