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 also introduce our Mobile Addiction Test, which shows that over the past two 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.
### 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 September 30th to October 7th, 2016, surveys were collected from a group of respondents who were then screened by 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, 2,010 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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AMERICAN LEISURE TRAVEL EXPECTATIONS are soaring. In recent years, travel expectations have continued on a stable positive path. In September, however, our national tracking survey recorded a strong upward surge in this metric. This optimism about upcoming leisure travel is shown by a record 37.4 percent of Americans saying they expect to travel more for leisure in the upcoming year, up from 32.2 percent just 3 months earlier. Travel spending expectations are also similarly high, signaling that prospects for continued positive leisure travel performance are strong. Meanwhile, traveler sentiment across the country is not entirely even, with residents of the two coasts showing the highest levels of optimism for travel in the upcoming year.

**Travel Expectations & Travel Spending Expectations**

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 (Trips)**

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<thead>
<tr>
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<tbody>
<tr>
<td>Expect More</td>
<td>37.4%</td>
<td>32.2%</td>
<td>34.2%</td>
<td>34.3%</td>
<td>9.9%</td>
<td>29.2%</td>
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<td>8.5%</td>
<td>8.0%</td>
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<td>9.0%</td>
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**Travel Expectations (Spending)**

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</thead>
<tbody>
<tr>
<td>Expect More</td>
<td>36.5%</td>
<td>32.8%</td>
<td>34.4%</td>
<td>35.0%</td>
<td>32.1%</td>
<td>31.5%</td>
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<tr>
<td>Expect the Same</td>
<td>53.3%</td>
<td>57.7%</td>
<td>54.8%</td>
<td>53.8%</td>
<td>56.7%</td>
<td>55.3%</td>
</tr>
<tr>
<td>Expect Less</td>
<td>10.2%</td>
<td>9.4%</td>
<td>10.8%</td>
<td>11.2%</td>
<td>11.2%</td>
<td>13.2%</td>
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</tbody>
</table>

**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?

**Q:** In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?
The Coasts are Most Optimistic about Increasing Travel in the Next Year

Percent of Travelers Planning to Increase their Travels, by Region, in the next 12 months

**Travel Expectations (Trips)**

- **MILLENIALS**
  - Expect more: 57.9%
  - Expect the same: 36.6%
  - Expect less: 5.5%

- **GEN X**
  - Expect more: 56.6%
  - Expect the same: 36.5%
  - Expect less: 6.9%

- **BABY BOOMERS**
  - Expect more: 63.3%
  - Expect the same: 26.8%
  - Expect less: 9.9%

- **PRE BOOMERS**
  - Expect more: 66.7%
  - Expect the same: 16.9%
  - Expect less: 16.4%

**Travel Expectations (Spending)**

- **MILLENIALS**
  - Expect more: 52.2%
  - Expect the same: 40.7%
  - Expect less: 7.1%

- **GEN X**
  - Expect more: 54.2%
  - Expect the same: 36.9%
  - Expect less: 8.9%

- **BABY BOOMERS**
  - Expect more: 61.3%
  - Expect the same: 28.0%
  - Expect less: 10.8%

- **PRE BOOMERS**
  - Expect more: 59.8%
  - Expect the same: 20.1%
  - Expect less: 20.1%

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?

Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?
WHAT KEEPS AMERICANS FROM TRAVELING MORE? It is clear that while a variety of factors come into play, personal finances are, by far, the most important factor constraining our leisure travels. In the most recent iteration of our survey, 37.4 percent of American leisure travelers reported that “personal financial reasons” had kept them at home, to some degree, in the past year. The demands of the workforce are also a major player. Nearly one-third of Americans say that either being “too busy at work” (23.0%) or “not having enough vacation time” (17.7%) kept them at home. Travel prices also have an impact. About 30 percent of travelers report that gasoline (14.3%) or airfare (22.2%) being too expensive kept them at home.

Travel Expectations

- FINANCIAL REASONS 37.4%
- TOO BUSY AT WORK 23.0%
- AIRFARE TOO EXPENSIVE 22.2%
- NOT ENOUGH VACATION TIME 17.7%
- SAFETY CONCERNS 14.6%
- GAS TOO EXPENSIVE 14.3%
- OTHER 9.3%
- ILLNESS 8.5%
- LACK OF AVAILABILITY 3.4%
- NONE OF THE ABOVE 24.5%

Safety concerns have been much talked about after terrorist attacks around the world, and about 15 percent of Americans report having cut back their travels as a result. Interestingly, younger travelers report much higher levels of safety-related travel angst. Millennials are more than twice as likely as Baby Boomers to say they have reduced their travels this year due to safety concerns. They are also the most likely generation to venture abroad for leisure reasons, possibly a motivation for this generation’s elevated levels of concern.

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?

M: Millennials
X: X-generation
B: Baby Boomers
PB: Pre-Baby Boomers

Safety Concerns by Generation

- 22.3% of Millennials say safety concerns kept them from traveling more last year
- 15.6% of X-generation
- 10.5% of Baby Boomers
- 5.5% of Pre-Baby Boomers
Mobile Phone Addiction on the Rise

Did you know that smartphones can be addicting because they trigger the release of “feel good chemicals” like serotonin and dopamine? As observers of widespread problematic cell-phone behavior, our research team 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 lifestyles and emotional world of travelers. Comparing 2015 data to the results of the current survey paints a fascinating picture of increasing emotional reliance on these devices.

**MOBILE PHONE ADDICTION SCORES, SEPT. 2016**

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<td>100</td>
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Destination Analysts’ Mobile Addiction Index™ measures a traveler’s behavioral dependency on mobile devices. Higher scores indicate higher levels of dependency on these devices. The average score nationally has moved from 51 to 57 in the past 21 months. Particularly fascinating is the dramatic increase in addiction amongst traveling Baby Boomers.

**GENERATION X**

Significant increase in mobile addiction

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<th>2016</th>
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<tr>
<td>10</td>
<td>57</td>
<td>62</td>
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**BABY BOOMERS**

Largest % increase in mobile addiction

<table>
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<tr>
<th>Score</th>
<th>2015</th>
<th>2016</th>
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<tr>
<td>1</td>
<td>42</td>
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2015 AVG. 51
2016 AVG. 57
The Deepening Emotional Bond

Dependence on our mobile phones has grown in interesting ways. Travelers report stronger habitual tendencies to pick up their phones to relieve any momentary boredom, greater likelihood of letting incoming text and email communications take precedence over their in-person social relationships, and even more likelihood to use their mobile devices when driving. Most tellingly, when given the scenario that their mobile device was lost or stolen and they could not replace it within two days, many more travelers now say it would be a very emotionally difficult situation for them.

### Habitually Use When Bored

- **% Answering “Often” or “Always”**
  - 56.0%
  - 33.0% change in past 21 months

### Check Notifications During Social Settings

- **% Answering “Often” or “Always”**
  - 41.8%
  - 16.4% change in past 21 months

### Read Texts and Email While Driving

- **% Answering “Often” or “Always”**
  - 25.7%
  - 10.3% change in past 21 months

**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?

**Q**: If my mobile device was lost or stolen and I could not replace it within two days, it would be a very emotionally difficult situation for me. **A**: Likely/Very Likely

<table>
<thead>
<tr>
<th>Year</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>2015</td>
<td>49.6%</td>
</tr>
<tr>
<td>2016</td>
<td>62.3%</td>
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Use of mobile content in travel planning has grown sharply in recent years. Nearly two out of three leisure travelers have used a mobile device as part of their travel planning in the past year. While nearly all travelers (94%) own or use mobile devices, not all use them to plan, and usage is in no way even between traveler segments or by point in the travel lifecycle. Survey respondents report that the majority of their pre-trip travel planning (65.2%) is done on a desktop or laptop device, with only 15.5 percent of this planning being done on a mobile device. While traveling, however, the story changes. Mobile devices are the most used resource (36.6%) during actual leisure travel. Younger travelers are also far more reliant on their mobile devices (than their older counterparts) for trip planning. This creates an interesting conundrum for destinations tasked with effectively persuading and servicing travelers of all ages.

**Mobile Usage for Travel Planning**

Use of mobile content in travel planning has grown sharply in recent years. Nearly two out of three leisure travelers have used a mobile device as part of their travel planning in the past year. While nearly all travelers (94%) own or use mobile devices, not all use them to plan, and usage is in no way even between traveler segments or by point in the travel lifecycle. Survey respondents report that the majority of their pre-trip travel planning (65.2%) is done on a desktop or laptop device, with only 15.5 percent of this planning being done on a mobile device. While traveling, however, the story changes. Mobile devices are the most used resource (36.6%) during actual leisure travel. Younger travelers are also far more reliant on their mobile devices (than their older counterparts) for trip planning. This creates an interesting conundrum for destinations tasked with effectively persuading and servicing travelers of all ages.

**Travel Planning Before Leaving Home**

% of travel planning done with each tool

- **Mobile**: 15.5%
- **Print**: 9.7%
- **Tablet**: 9.6%
- **Laptop/Desktop**: 65.2%

**Travel Planning While on Leisure Trips**

% of travel planning done with each tool

- **Mobile**: 36.6%
- **Print**: 16.7%
- **Tablet**: 14.3%
- **Laptop/Desktop**: 32.4%
Most travelers still prefer planning on a desktop

While use of mobile devices is exploding, 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), nearly two-thirds of travelers 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, they were not across generations.

Millennial travelers are far more likely to prefer using their mobile phones than their older traveling counterparts. In the case of researching “travel activities, attractions or events,” nearly half (44.6%) of Millennials report preferring to use a mobile device, compared to less than one in ten (9.0%) Baby Boomers. This difference appears to be driven by comfort levels with the devices. Younger travelers are far more likely to report that they consider using a mobile device to plan travel as “easy.”

Of Millennials prefer using a mobile device to research travel activities and attractions.

For researching activities, attractions or events, 31.4% strongly preferred using a laptop. 15.4% preferred using mobile. Although 57.0% of travelers believe it is easy or very easy to use a mobile device to research and find travel information, only 45.9% find it easy or very easy to actually purchase or book travel products and services.

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?
Travelers use their mobile devices very differently while planning (pre-travel) and while traveling.

While mobile phones are used for many planning tasks, the most common resources accessed while traveling are maps and restaurant content. Pre-travel usage of mobile devices is highest for pricing, hotels and viewing travel photos.

**PRE-TRAVEL**
Top 5 tasks accessed

- 31.8% of travelers used their mobile device to access PRICES
- 31.6% access MAPS
- 31.2% access HOTEL INFORMATION
- 29.1% access DESTINATION PHOTOS
- 26.5% access RESTAURANTS/DINING

**WHILE TRAVELING**
Top 5 tasks accessed

- 36.9% of travelers used their mobile device to access MAPS
- 30.6% access RESTAURANTS/DINING
- 23.0% access PRICES
- 22.4% access ACTIVITIES/ATTRACTIONS
- 20.4% access HOTEL INFORMATION
Thank You

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