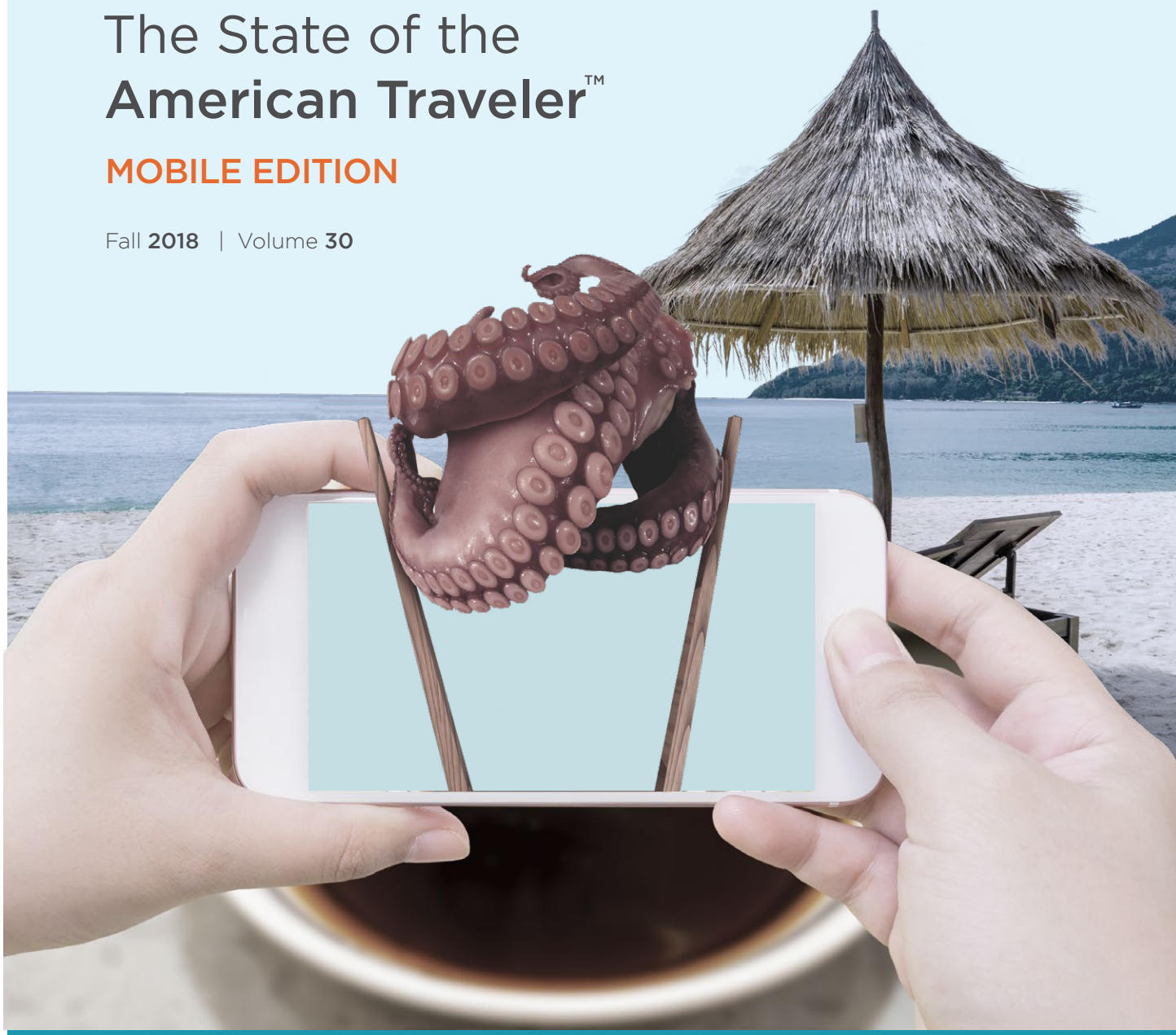


The State of the American Traveler™

MOBILE EDITION

Fall 2018 | Volume 30



Destination  Analysts

The Mobile Edition

THIS FALL EDITION of *The State of the American Traveler*™ continues our ongoing exploration of travelers' use of mobile devices. We begin, as is our tradition, with an examination of current American travel sentiment which continues to be very positive. The record levels of optimism for travel that we have seen in the past few years show no signs of abating. After this look at travel sentiment, we look deeply into travel and mobile devices. While our apparent addiction to as well as our overall

usage of mobile phones is stabilizing, their use in travel planning is rapidly growing. While traditional desktop and laptop devices still are more heavily used and preferred for travel planning, this landscape is changing. We hope you find this edition of value. If you should 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 September 23rd to the 30th, 2018, 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, 2,030 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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1.1 Travel Expectations: Trips & Spending

THE REMARKABLE STREAK OF HIGH LEISURE

TRAVEL EXPECTATIONS continues. In the last several years, American travel expectations have been strong and stable, a pattern that shows no signs of changing. In October of this year, 37.5 percent of Americans say

they expect to travel more for leisure in the upcoming year, down very slightly from 38.2 percent one year earlier. Travel spending expectations are also up, with 36.9 percent of travelers planning to increase their spending in the upcoming 12 months. Further highlighting the positive outlook for the domestic leisure travel market, the average American expects to spend \$3,232 on their leisure travels in the next year, up 2.6 percent from one year earlier.

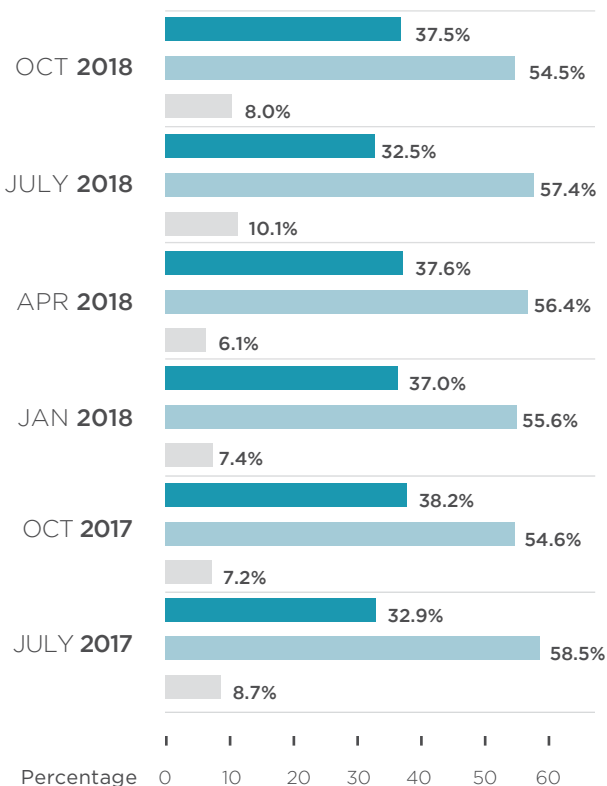
THE KEY:

expect more

expect the same

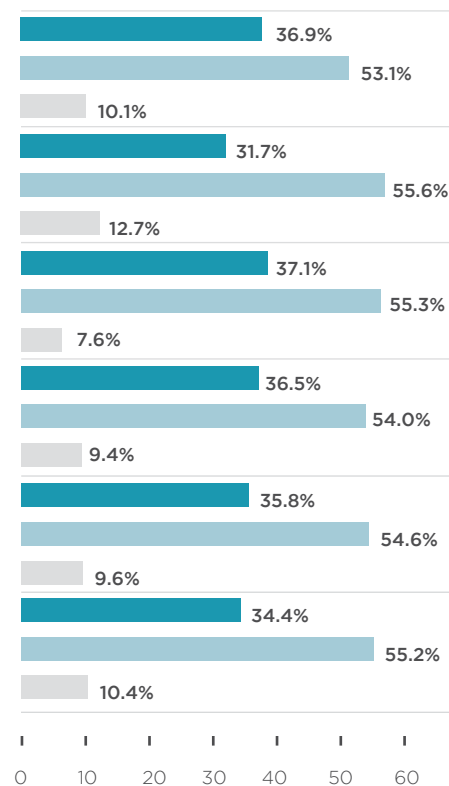
expect less

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?

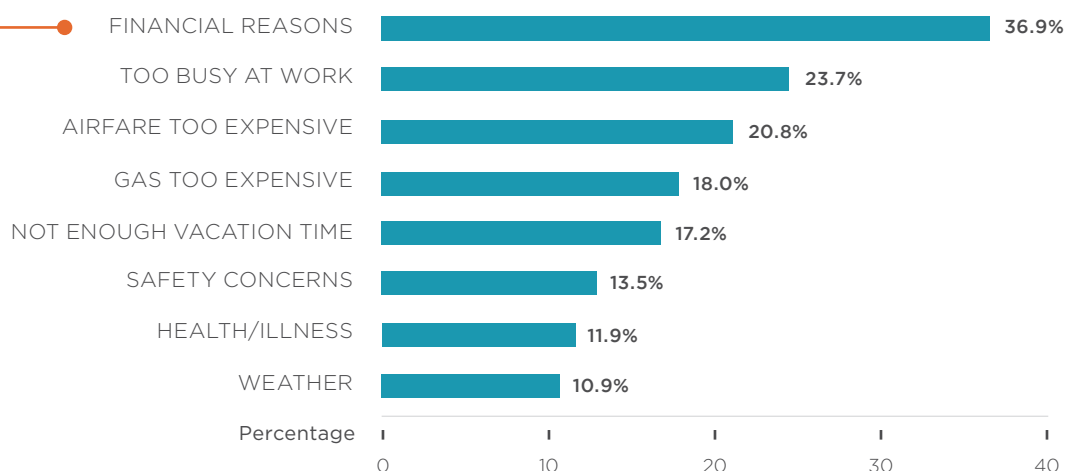
2.1 What Keeps Us From Traveling?

As always, personal finances are the most important factor constraining our leisure travels-but the negative forces they put on leisure markets has lessened somewhat this year. Our Fall 2018 poll shows that just over one third (36.9%) of American leisure travelers reported that "personal financial reasons" had kept them at home, to a degree, during the past year. This is down from 44.0 percent last year at the same time. The demands of the

workforce also continue to be significant. Just under one third of Americans (32.2%) say that either being "too busy at work" (23.7%) or "not having enough vacation time" (17.2%) kept them at home. While its unlikely that a sea-change is happening in our over-worked culture, the good news is that these figures are down from last year, when 37.2 percent said work demands had kept them from traveling more than they would have hoped.

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 Abate



Personal Financial Concerns by Survey Cycle

16.1% Concerns over personal finances are down 16.1 percent from this time last year.

In the past year, money-related impediments to travel have diminished. Concerns over personal finances peaked last year at this time, with 44.0 percent of leisure travelers saying these worries had, to some degree, kept them at home in the previous 12 month. In the most recent survey, only 36.9 percent said that financial concerns had kept them from traveling this year, a significant improvement.

3.1

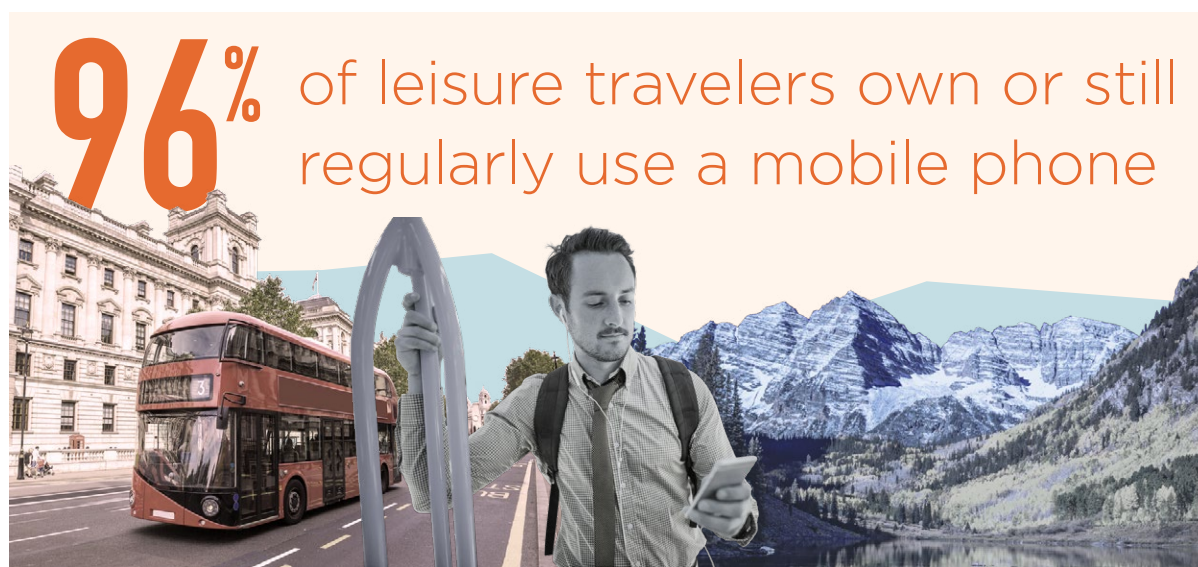
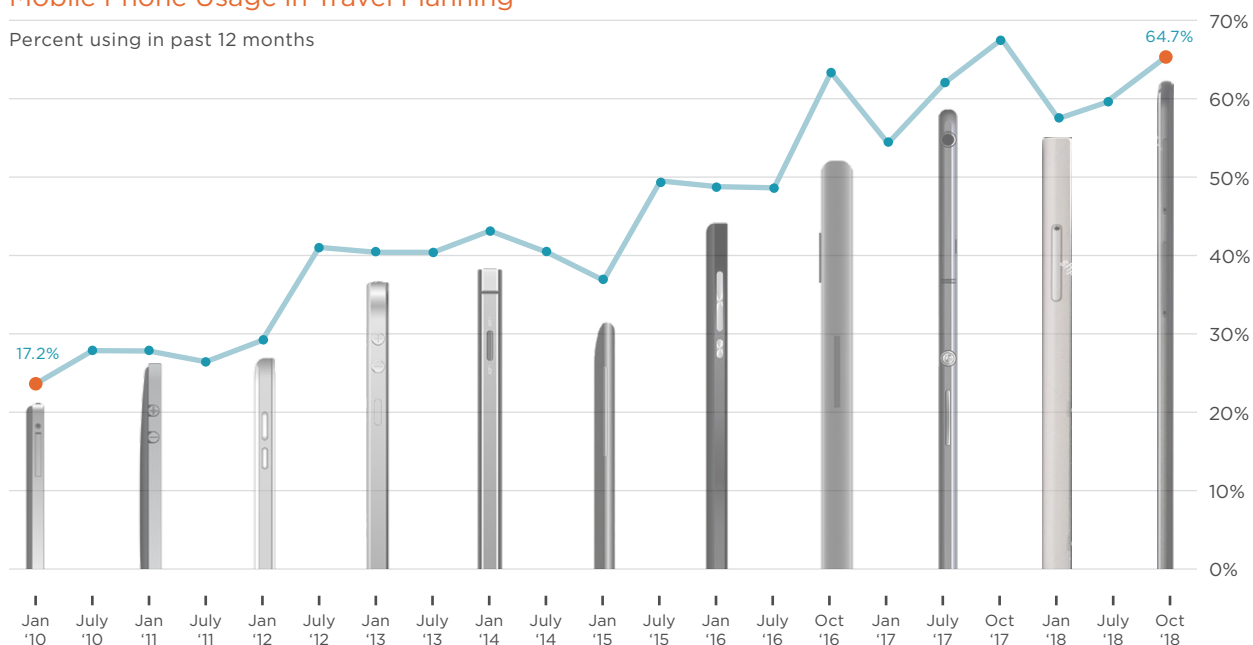
Going Mobile: Phones & Travel Planning

A plurality of leisure travelers, of course, continue to use their mobile phones to plan their leisure travels. As we have tracked use of mobile devices for leisure travel planning for well over a decade, the trends seem evident. In 2008, fewer than one in five (17.2%) travelers used them to help plan their leisure trips.

Now, fully 96 percent of American leisure travelers own or regularly use a mobile phone, with 64.7 percent using this device to plan their trips. The proportion of leisure travelers using their phones as travel planning resources seems to have moderated in recent years, at about two thirds of the traveling population.

Mobile Phone Usage in Travel Planning

Percent using in past 12 months



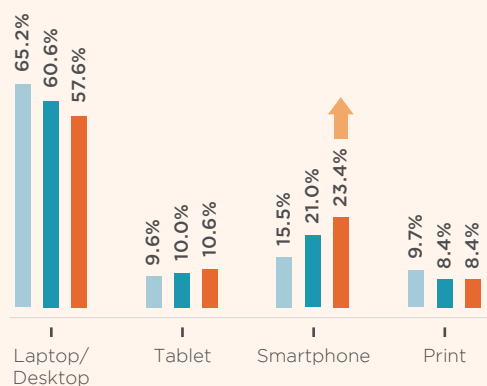
3.2

Use of mobile phones in trip planning before leaving home has nearly tripled in the past 3 years.

BEFORE THE TRIP

■ OCT '16 ■ OCT '17 ■ OCT '18

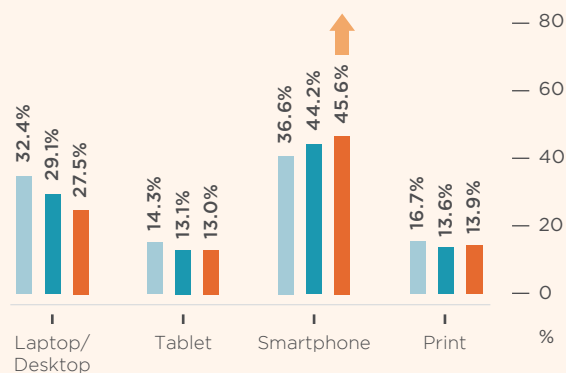
Q: What percentage of your travel planning is typically done using each of the following before you leave for your trip?



DURING THE TRIP

■ OCT '16 ■ OCT '17 ■ OCT '18

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

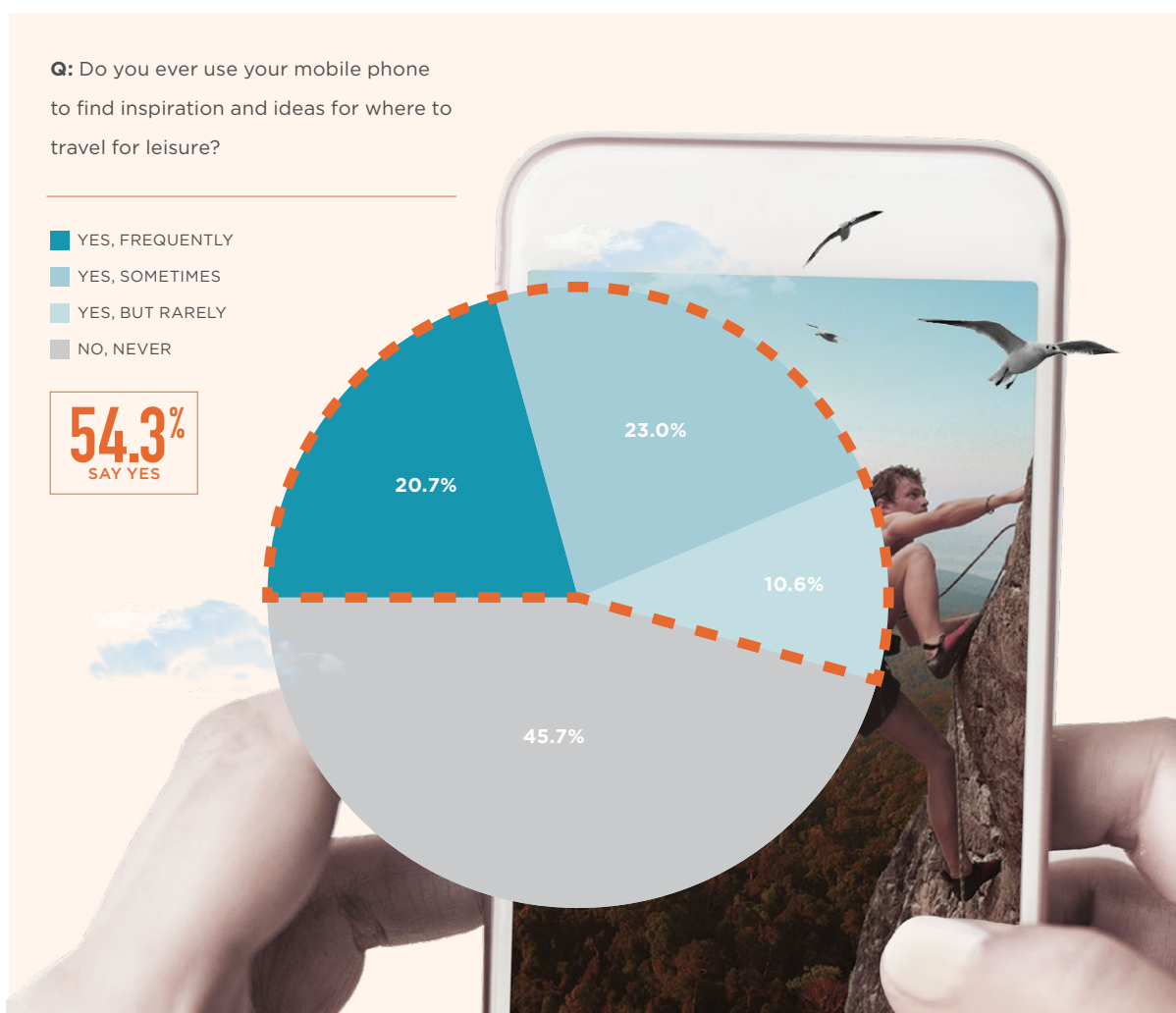


3.3

Mobile phones continue to be more and more important in all stages of travel planning. **They're also important sources of destination inspiration.**

Beyond simply gathering logistical information for their trips, most travelers also use their mobile phones to find inspiration or ideas on places to travel. Whether using social media, search engines, travel apps or simply finding ideas by chance, well over half of the traveling public (54.3%) say they use their phones for such inspiration. One in five (19.9%) say they do so frequently.

TRAVEL RESEARCH AND INSPIRATION



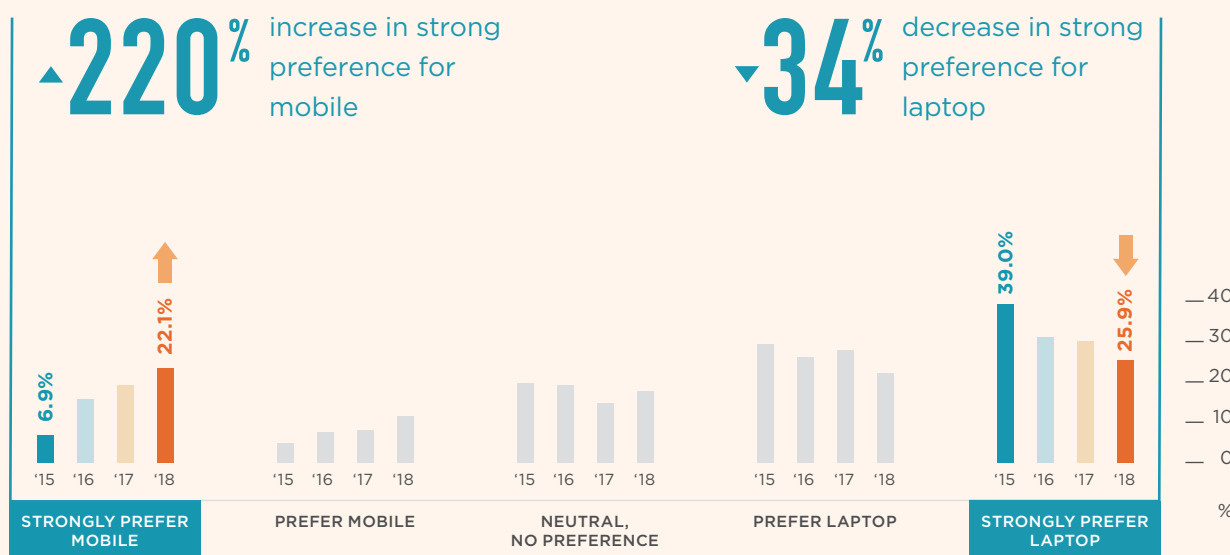
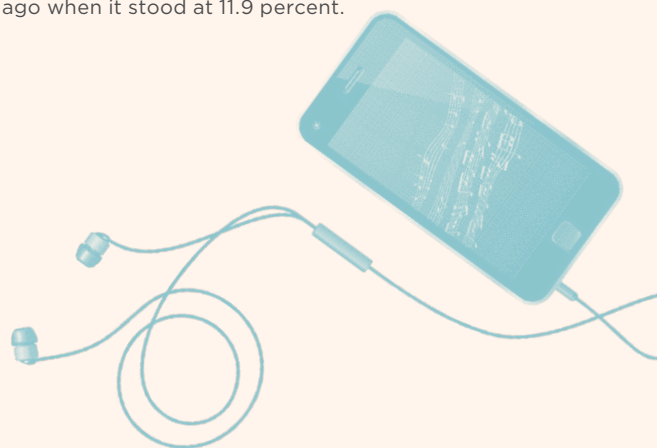
4 Desktop vs. Mobile Preferences

Not only are mobile phones being used more, but consumer preferences are beginning to shift toward mobile planning. Travelers still report a generally higher level of preference for using desktop or laptop devices. Nearly half (48.8%) say that if given a choice, they would generally prefer or strongly prefer to use these devices

over other options. However, over a third (33.4%) of travelers say they would now prefer to use their mobile phone over other options. This marks a significant shift in consumer opinion—a near tripling of this figure from three years ago when it stood at 11.9 percent.

Significant 3 Year Shift

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?



5.1 Mobile Addiction is Staying High

We've all seen them; friends, family and coworkers that seem hopelessly addicted to their mobile devices. As observers of this widespread problem, our research team created Destination Analysts' Mobile Addiction Index™—a set of behavioral and opinion tracking

questions that measures the importance of mobile devices to the emotional world of travelers. While any level of addiction is worrisome, the good news is that travelers, as a group, seem to have a handle on the problem, or at least things aren't getting worse.

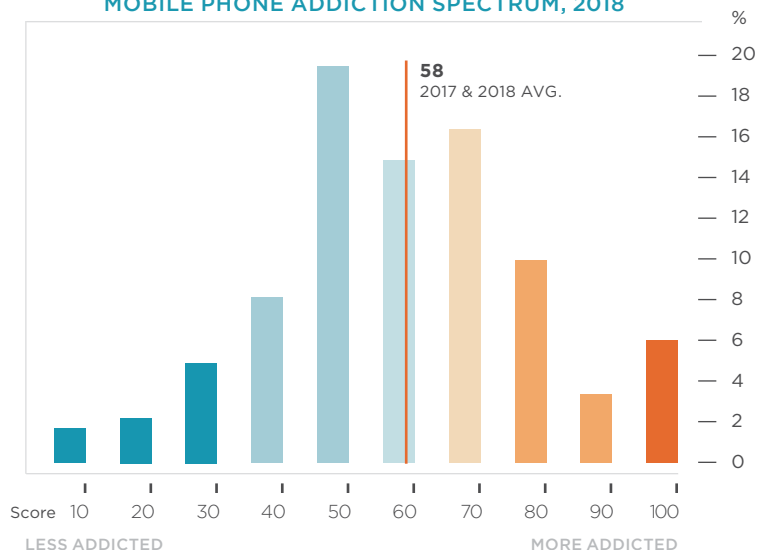
Over the last two years growth in this index has virtually stopped.

AVERAGE MOBILE ADDICTION SCORE

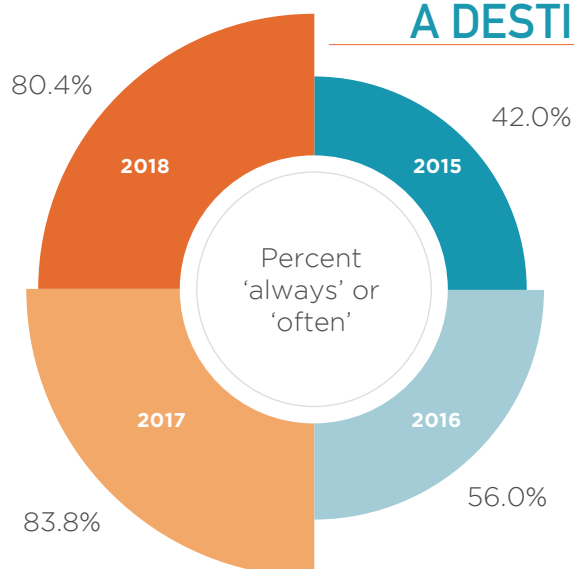


Destination Analysts' Mobile Addiction Index™ measures a traveler's behavioral and emotional dependency on mobile devices. Higher scores indicate higher levels of dependency on these devices. The index now stands at 58, unchanged from last year.

MOBILE PHONE ADDICTION SPECTRUM, 2018



A DESTINATION MARKETER'S DREAM?

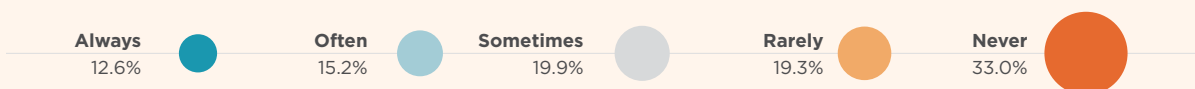


We showed earlier that most travelers actively use their phones for destination inspiration, scouring social media, browsing photos or proactively using search engines. The mobile environment is now powerful for effecting destination selection. Over the last two years travelers have used mobile devices their go-to resource to entertain themselves when bored or unoccupied.

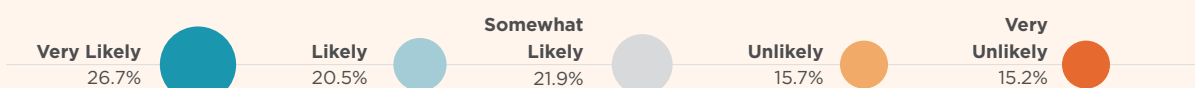
Q: In the normal course of your day, if you become bored or momentarily have some free time, how often will you feel the urge to pick up your mobile phone to entertain yourself?

6.1 Fun Facts: Travelers & Mobile Phones

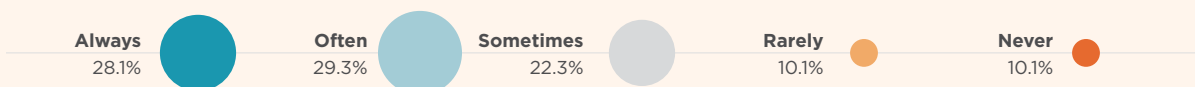
Q: If you are driving and you receive a text or email message, how likely are you to look at your mobile device and read it while driving or at the next stop sign/light?



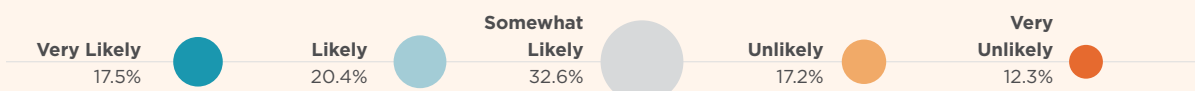
Q: If my mobile device was lost or stolen and I could not replace it within two days, it would be a very emotionally difficult situation for me.



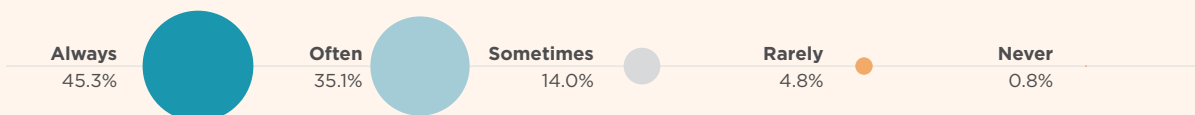
Q: In the normal course of your day, how often is your mobile phone on your person (or within easy reach)?



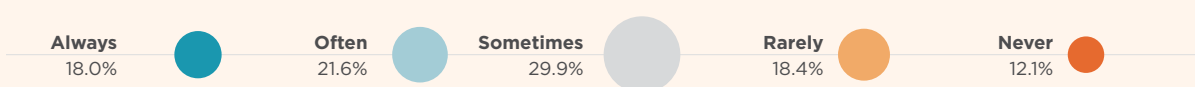
Q: When you are using your mobile device in the company of friends and family, how likely are you to feel guilty (even if momentarily) that you are not interacting with them?



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?



Thank You

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