

The State of the American Traveler™

MOBILE EDITION

Fall 2016 | Volume 22



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 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.

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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 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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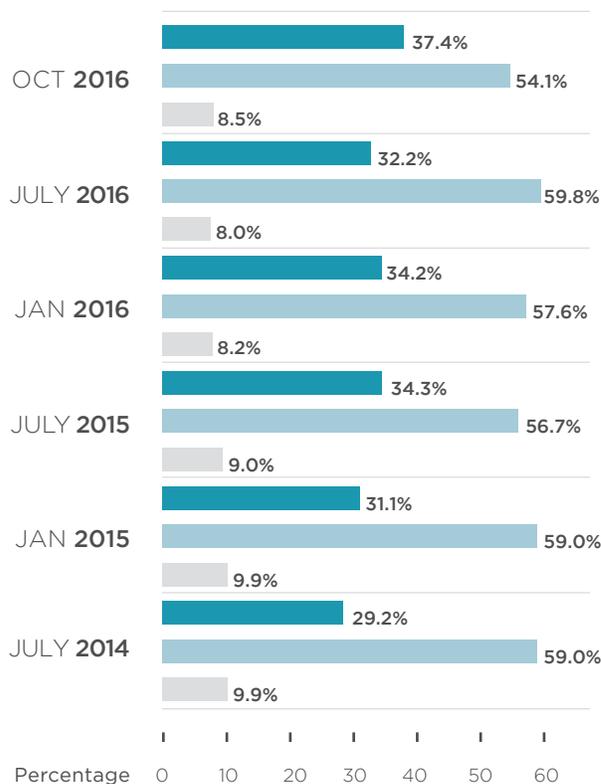
1.1 Travel Expectations & Travel Spending Expectations

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.

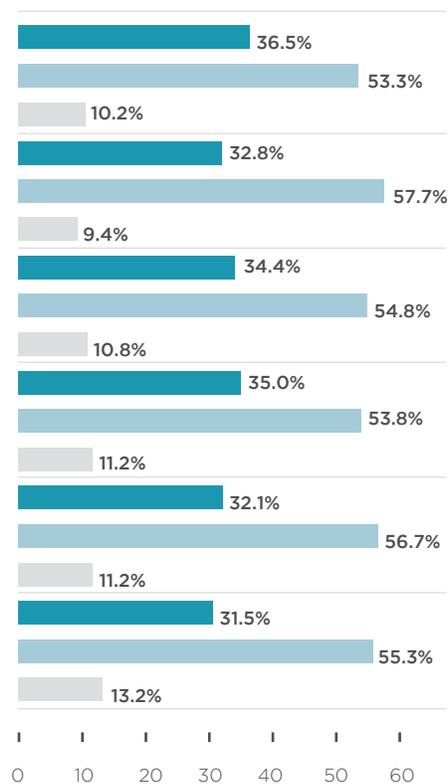
THE KEY: ■ expect more ■ expect the same ■ expect less

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?

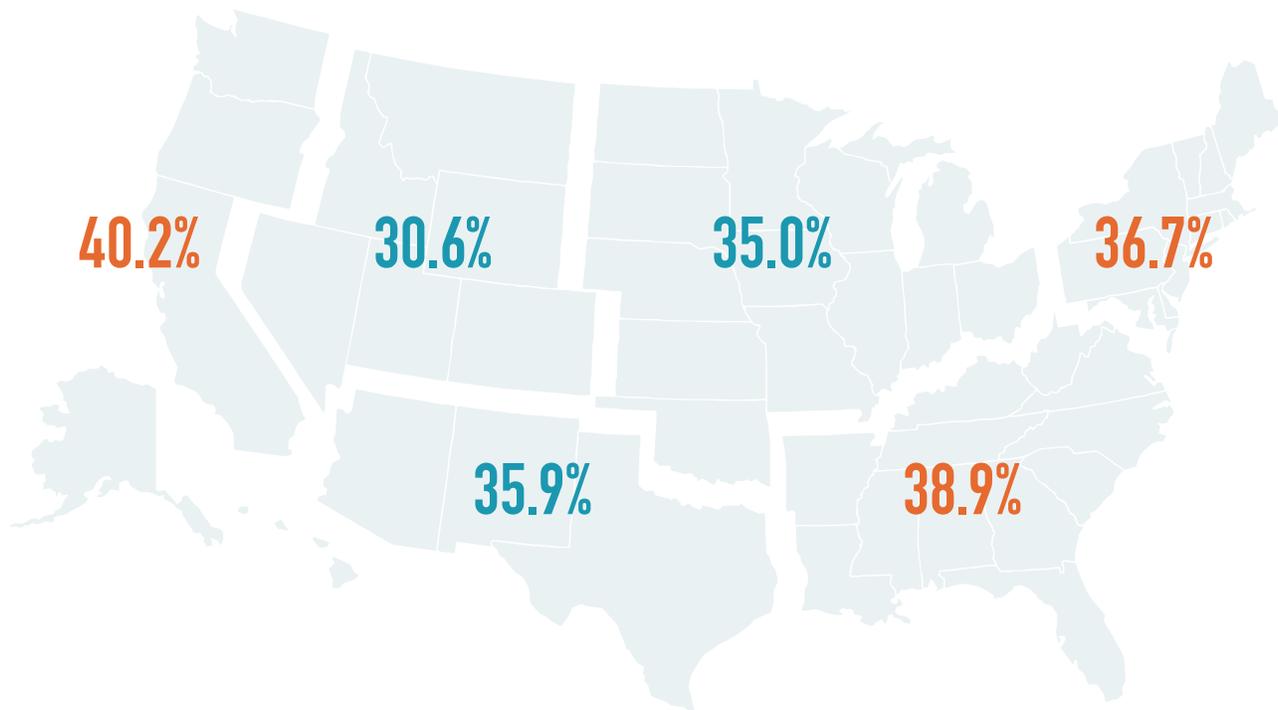
Travel Expectations (Spending)



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

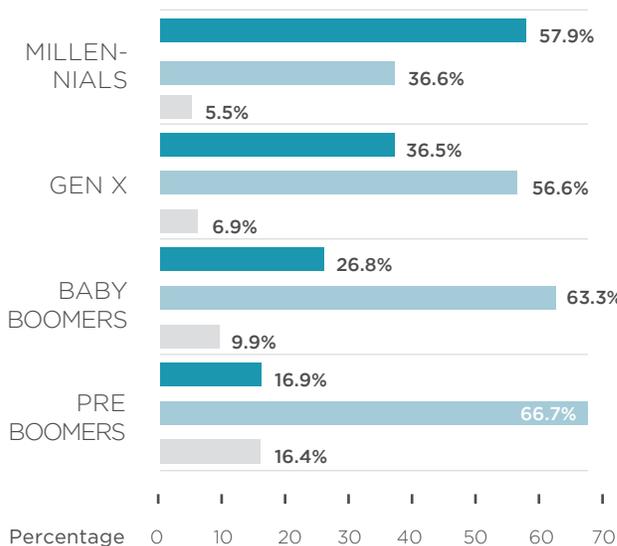
1.2 The Coasts are Most Optimistic about Increasing Travel in the Next Year

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

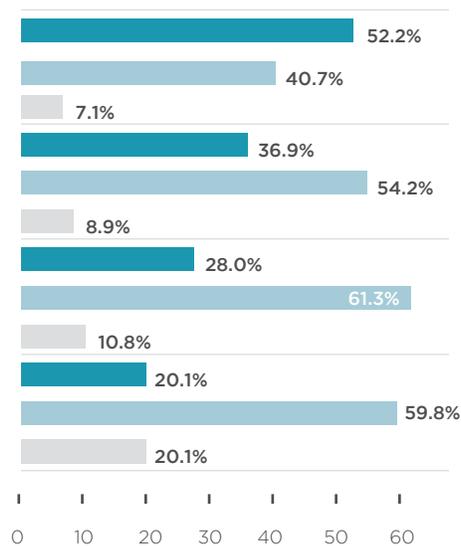


THE KEY: ■ expect more ■ expect the same ■ expect less

Travel Expectations (Trips)



Travel Expectations (Spending)



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?

2 Travel Impediments

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%**
-18.5% since 2010

TOO BUSY AT WORK **23.0%**

AIRFARE TOO EXPENSIVE **22.2%**
-16.7% since 2011

NOT ENOUGH VACATION TIME **17.7%**

SAFETY CONCERNS **14.6%**

GAS TOO EXPENSIVE **14.3%**
-39.3% since 2011

OTHER **9.3%**

ILLNESS **8.5%**

LACK OF AVAILABILITY **3.4%**

NONE OF THE ABOVE **24.5%**

Percentage

0 10 20 30 40 50

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?

Millennials more worried about safety while traveling



Safety Concerns by Generation

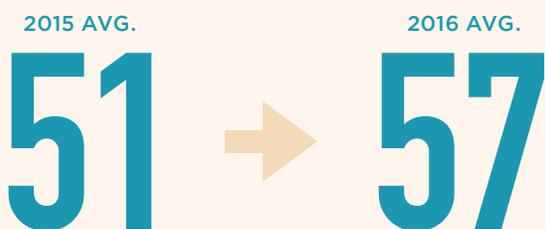
22% of Millennials say safety concerns kept them from traveling more last year

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.

3.1

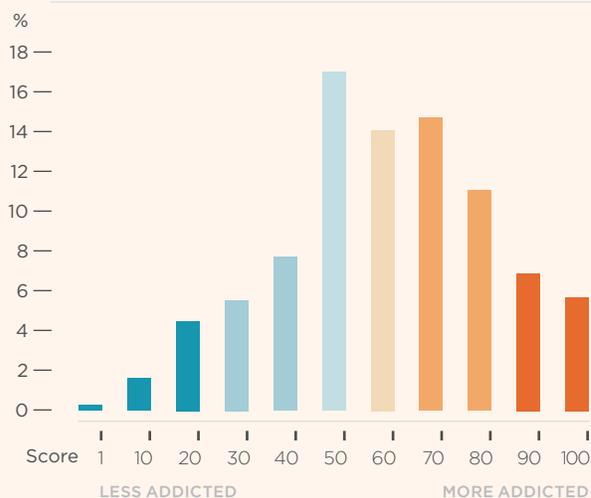
Mobile Phone Addiction on the Rise

Did you know that smartphones can be addictive 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.



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.

MOBILE PHONE ADDICTION SCORES, SEPT. 2016



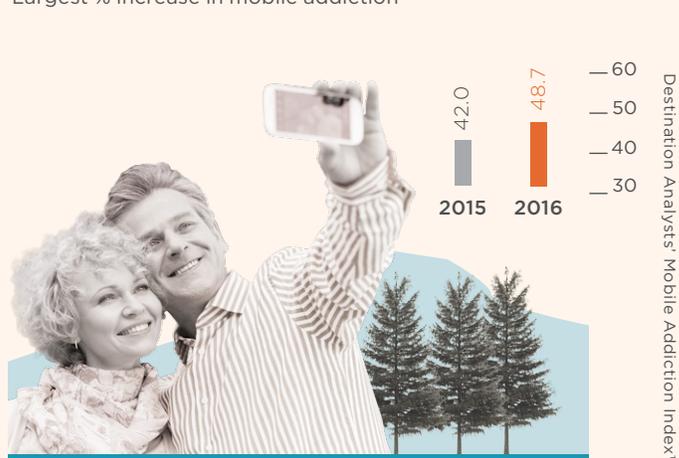
GENERATION X

Significant increase in mobile addiction



BABY BOOMERS

Largest % increase in mobile addiction



Destination Analysts’ Mobile Addiction Index™

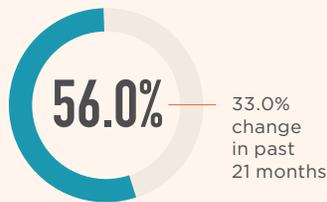
3.2 The Deepening Emotional Bond

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

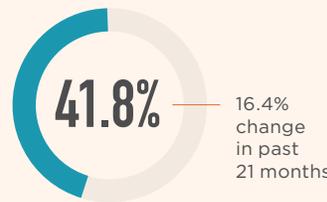
% Answering "Often" or "Always"



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?

Check Notifications During Social Settings

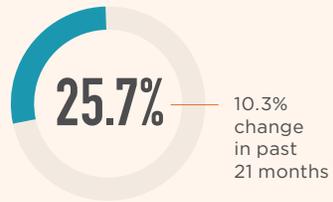
% Answering "Often" or "Always"



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?

Read Texts and Email While Driving

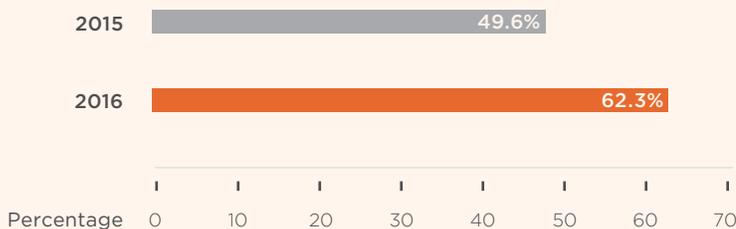
% Answering "Often" or "Always"



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?

EMOTIONAL ATTACHMENT

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



Destination Analysts' Mobile Addiction Index™



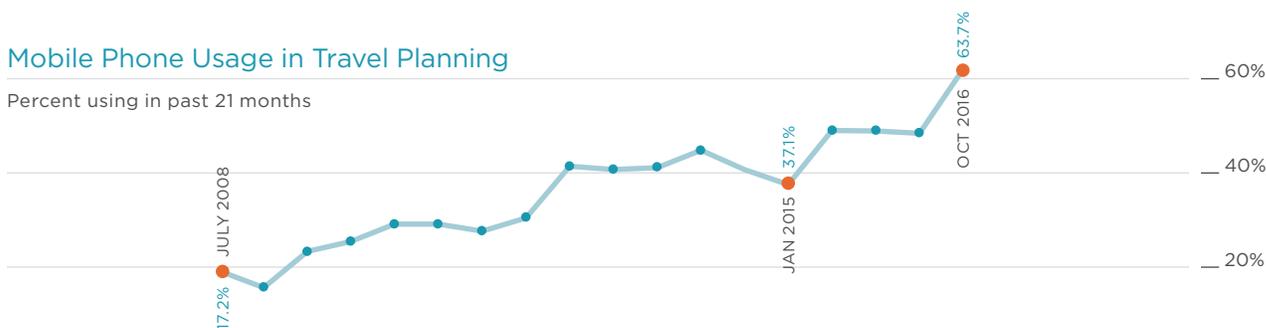
4.1 Mobile Usage for Travel Planning

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

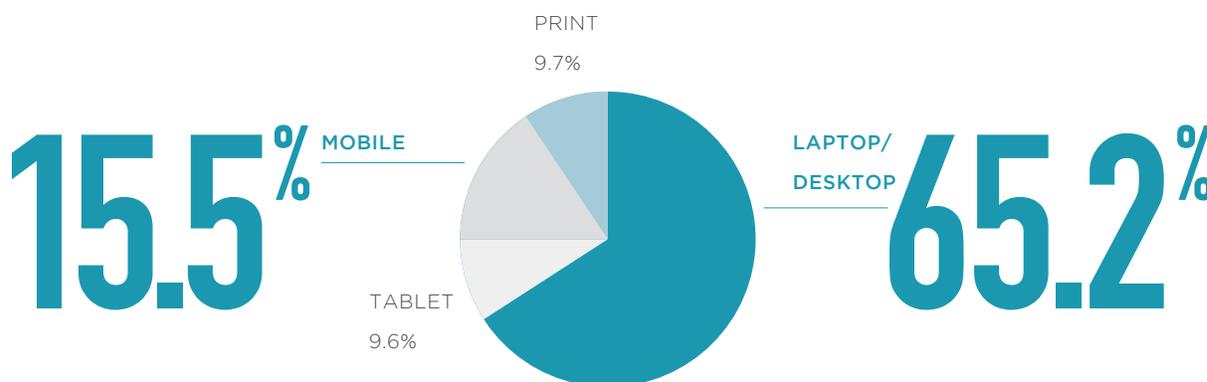
on a desktop or laptop device, with only 15.5 percent of this planning being done on a mobile device. While traveling, however, the story changes. Mobile devices are the most used resource (36.6%) during actual leisure travel. Younger travelers are also far more reliant on their mobile devices (than their older counterparts) for trip planning. This creates an interesting conundrum for destinations tasked with effectively persuading and servicing travelers of all ages.

Mobile Phone Usage in Travel Planning

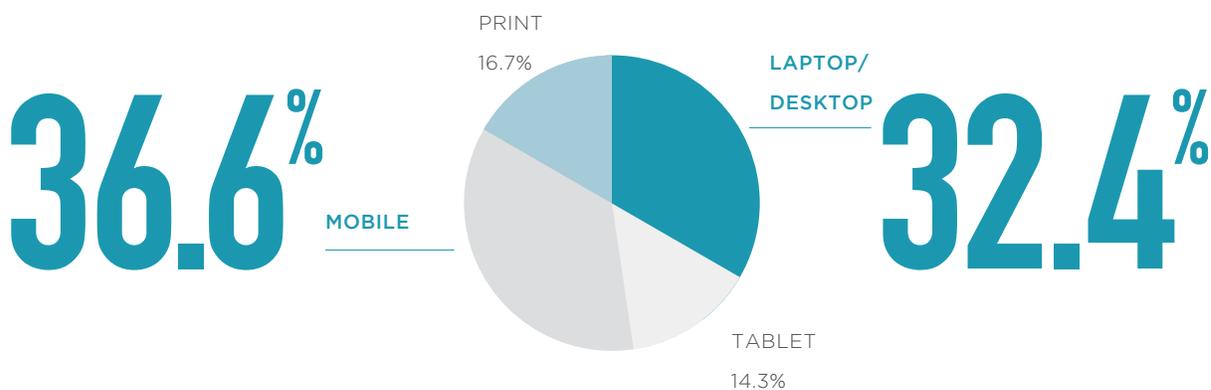
Percent using in past 21 months



Travel Planning Before Leaving Home % of travel planning done with each tool



Travel Planning While on Leisure Trips % of travel planning done with each tool



4.2

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.”

Mobile for Research, Desktop for Purchase

44.6% 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?



4.3 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**

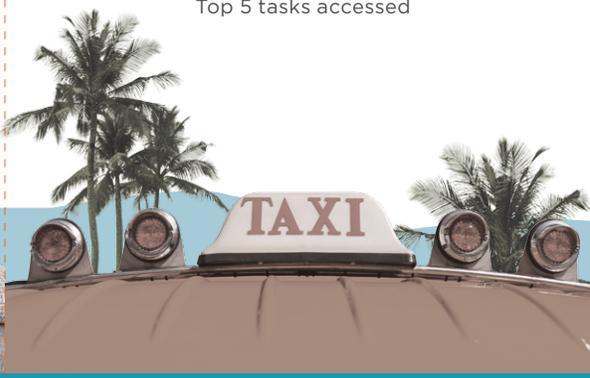
31.2% access **HOTEL INFORMATION**

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**

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