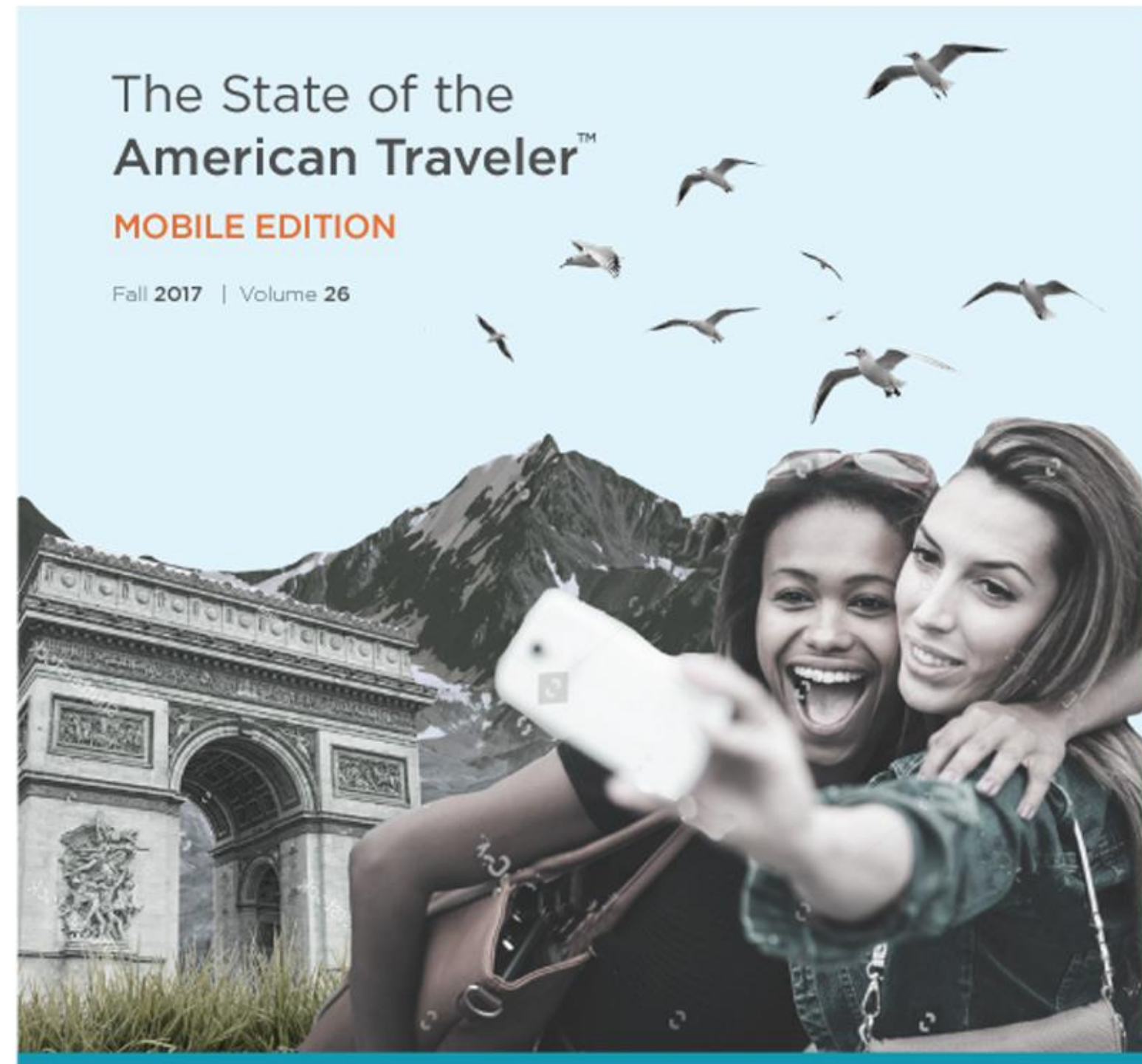


THE STATE OF THE AMERICAN TRAVELER

MOBILE EDITION



About The State of the American Traveler



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.

info@destinationanalysts.com
or @DA_Research.

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- **Online survey conducted since 2006**
- **Survey invitation sent to a nationally representative sample of US adults**
- **Total sample of 2,000 American leisure travelers**
- **Examines traveler sentiment, motivations & behaviors**
- **Conducted quarterly**

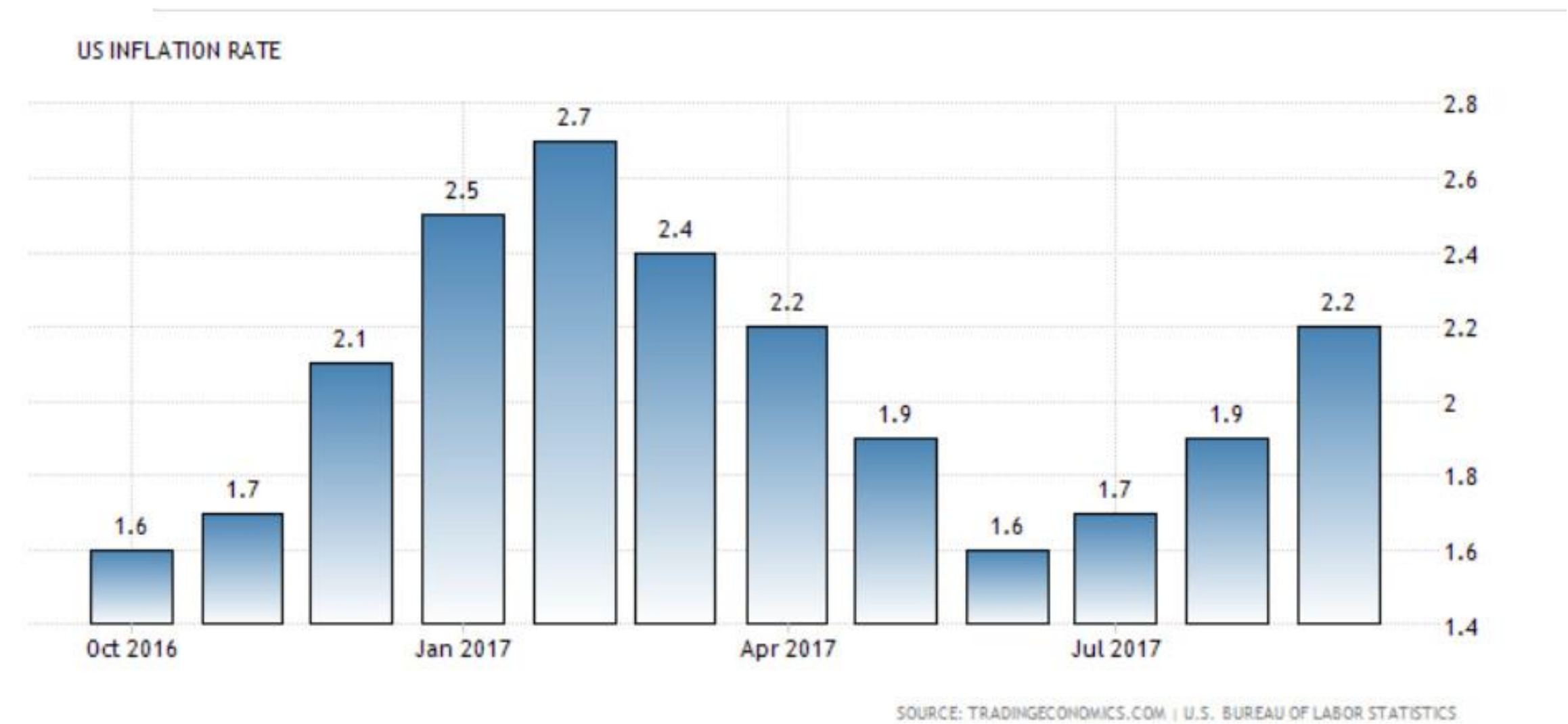
Destination  Analysts
DO YOUR RESEARCH

October 2017

American Traveler Sentiment

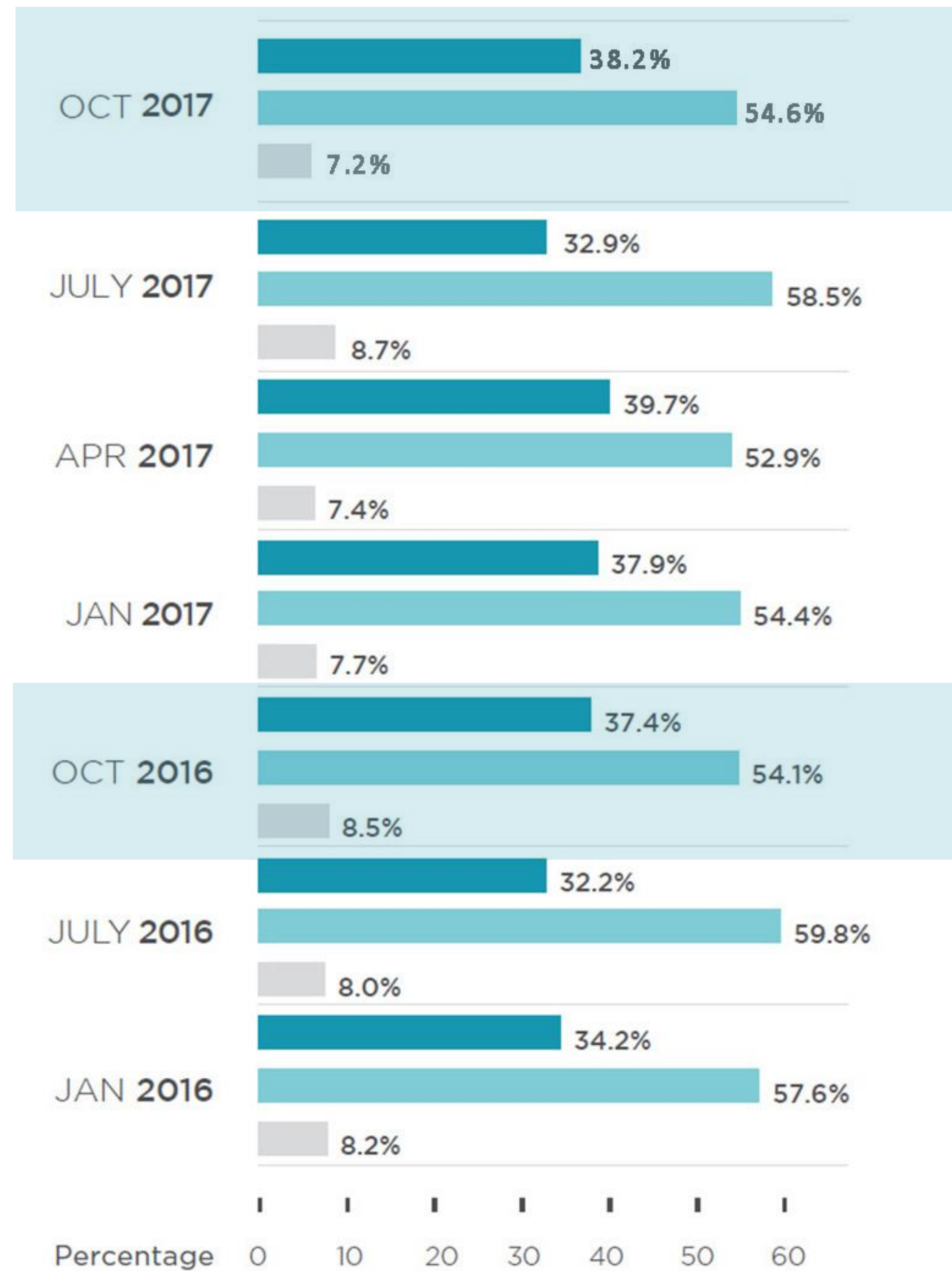


Current Economic Conditions



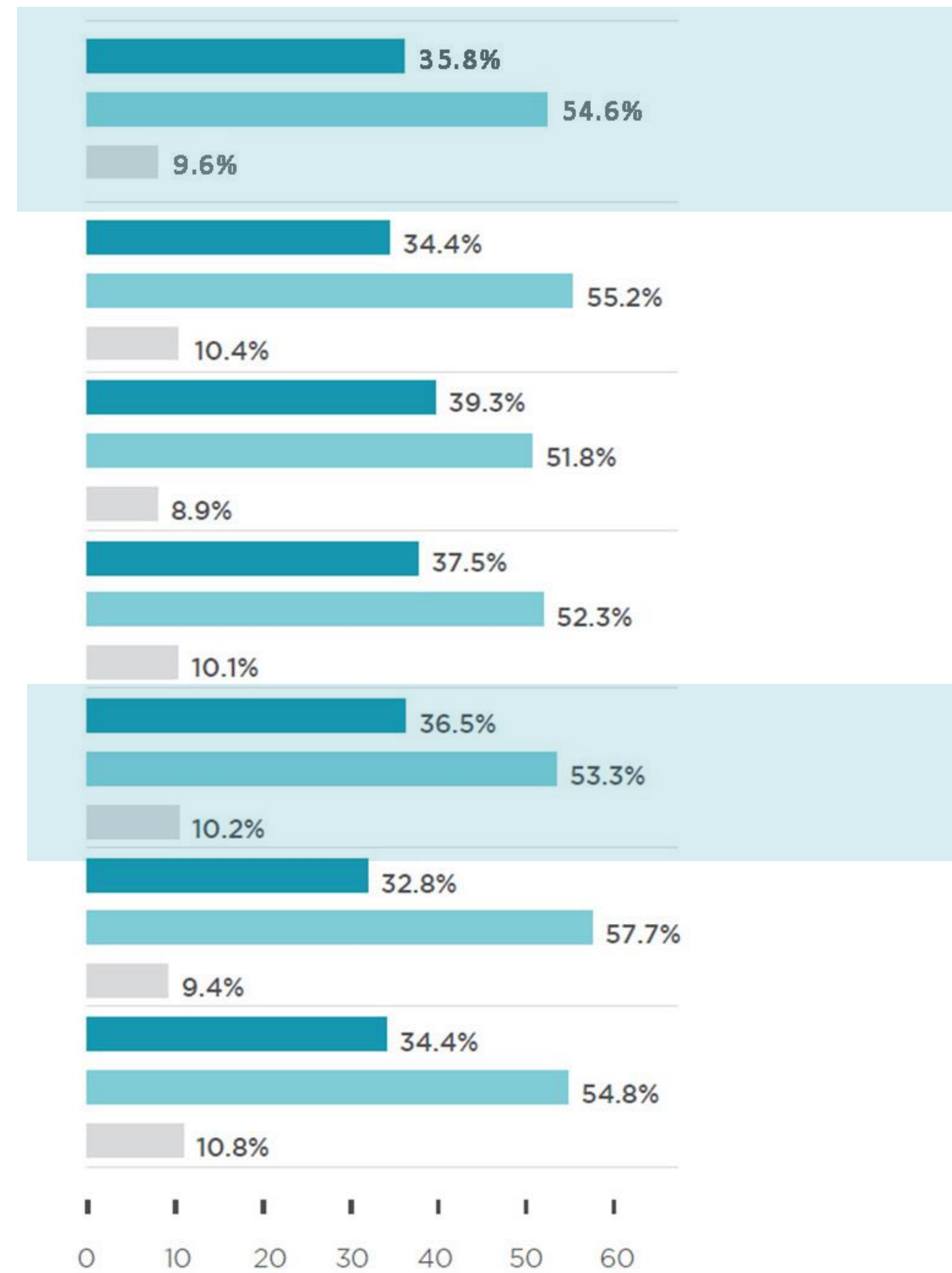
THE KEY: ■ expect more ■ expect the same ■ expect less

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)

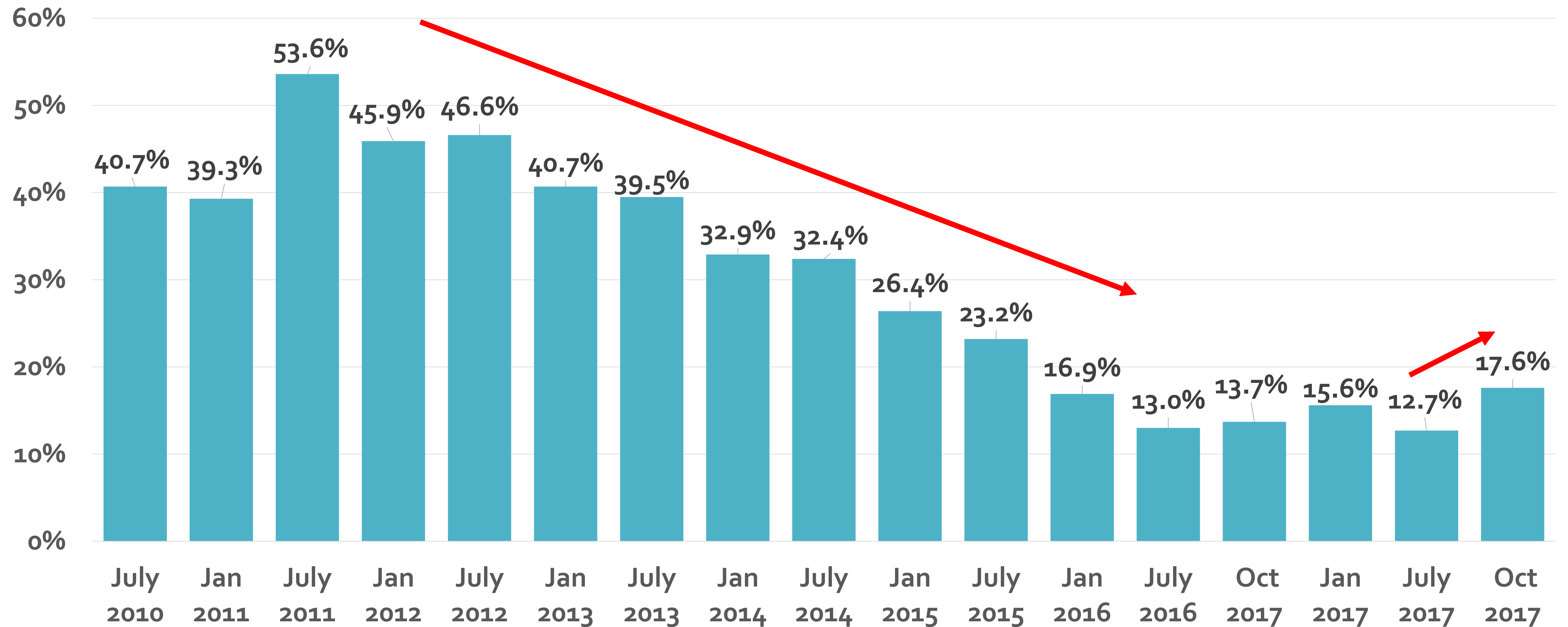


Q: In the next 12 months, do you expect to spend more or less for leisure travel than you did in the most recent 12 month period?

Current Leisure Travel Optimism

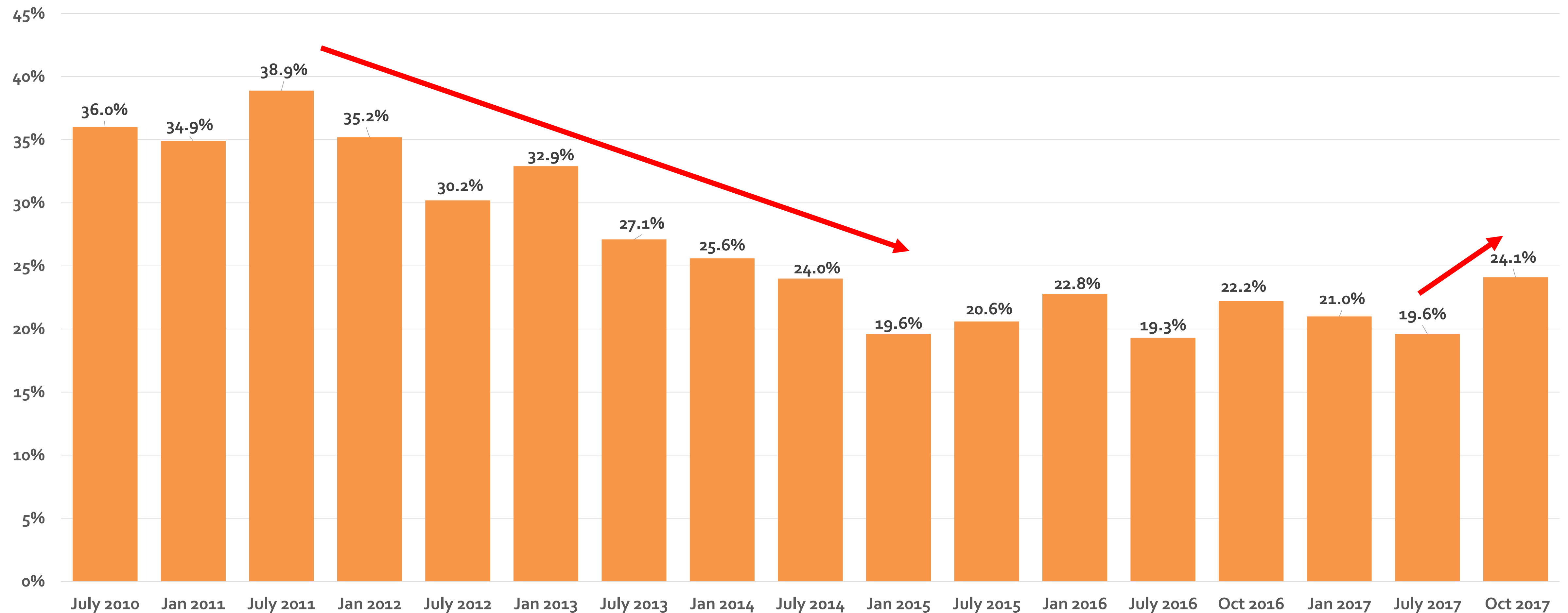
Trips & Spending (Next 12 Months)

Impediments to Travel: Gasoline Prices



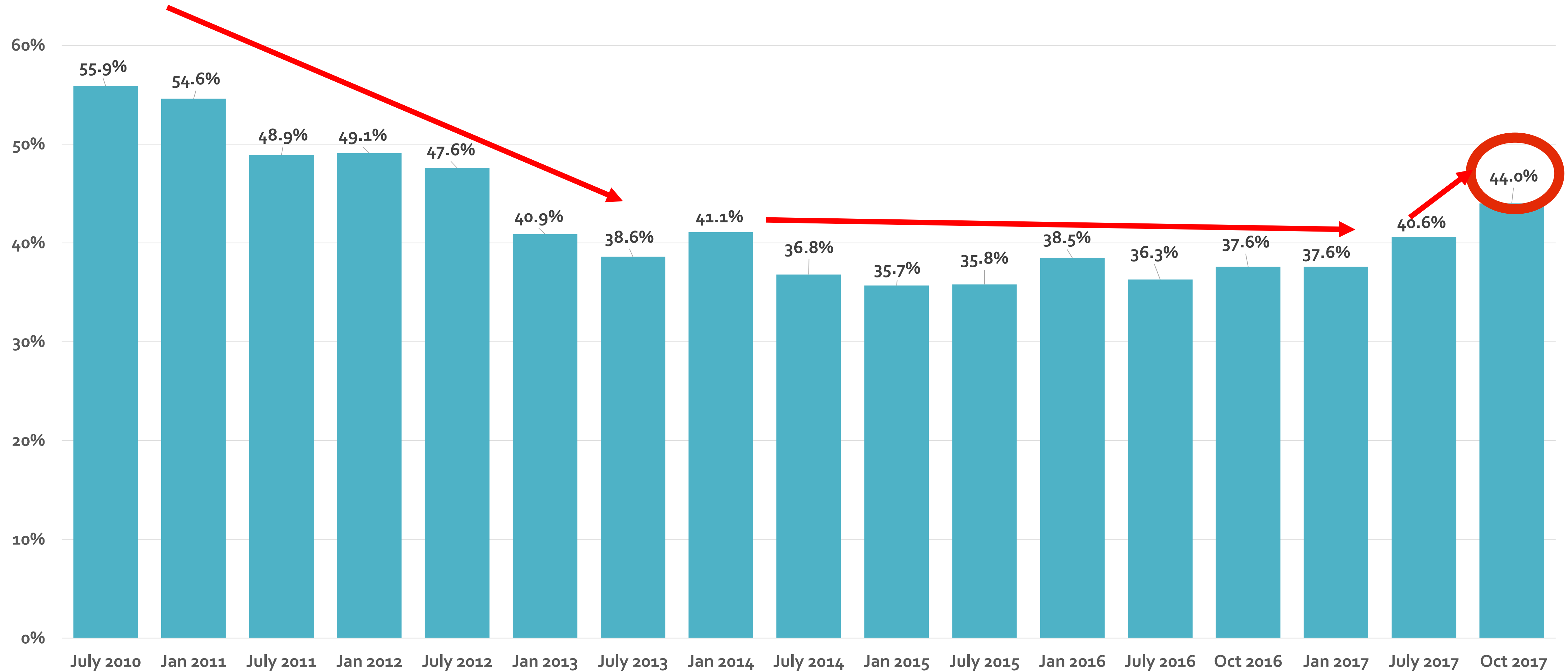
Percent of Leisure Travelers

Impediments to Travel: Airfare too Expensive



Percent of Leisure Travelers

Impediments to Travel: Personal Finances



Percent of Leisure Travelers

A Profile

The Mobile Travel Planner

Mobile Penetration Amongst Travelers

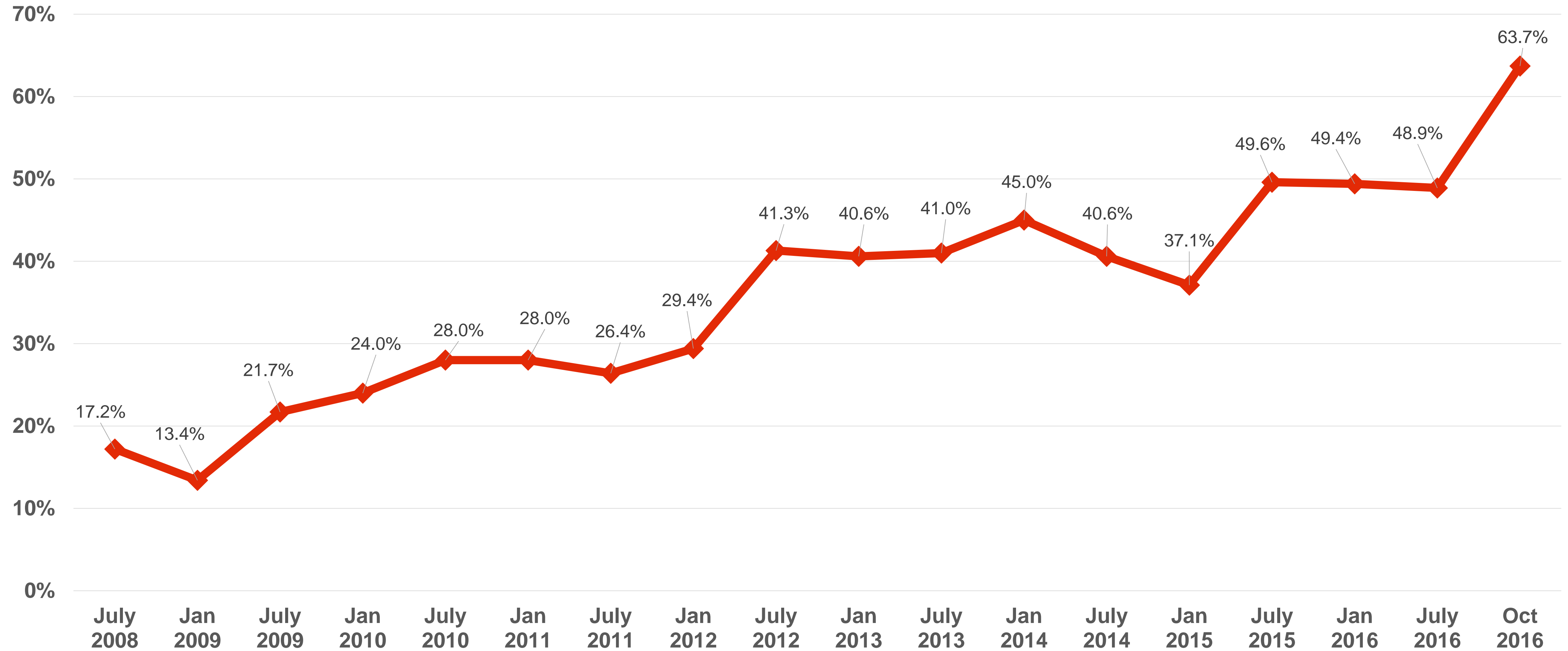
Q: Do you own or regularly use a mobile phone?



2015	2016	2017
94.0%	94.2%	95.8%

Mobile Phone Usage in Travel Planning

(% of leisure travelers using mobile phones to plan travel)

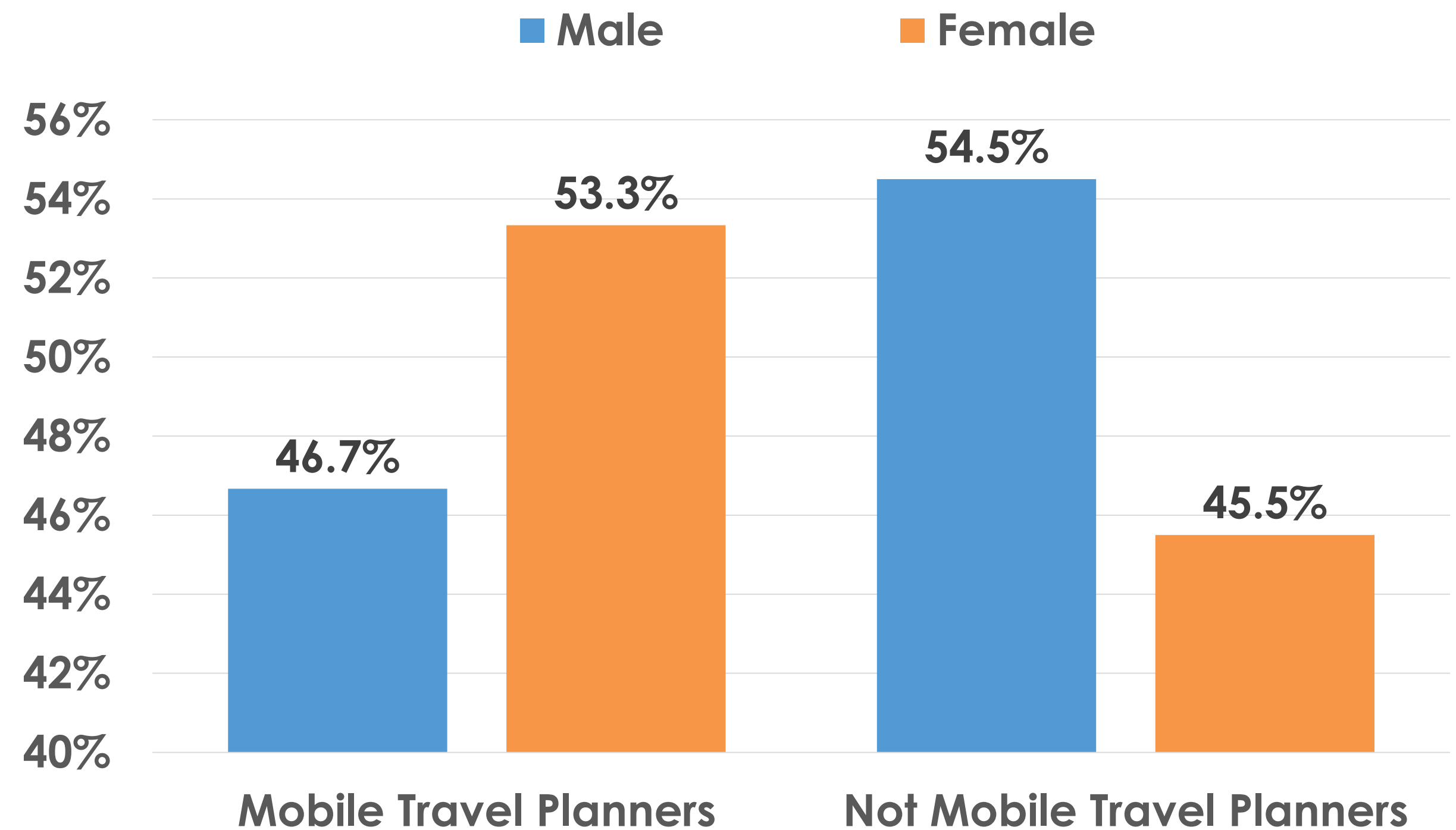


WHO are
the Mobile
Travel
Planners?



Who Are Mobile Travel Planners?

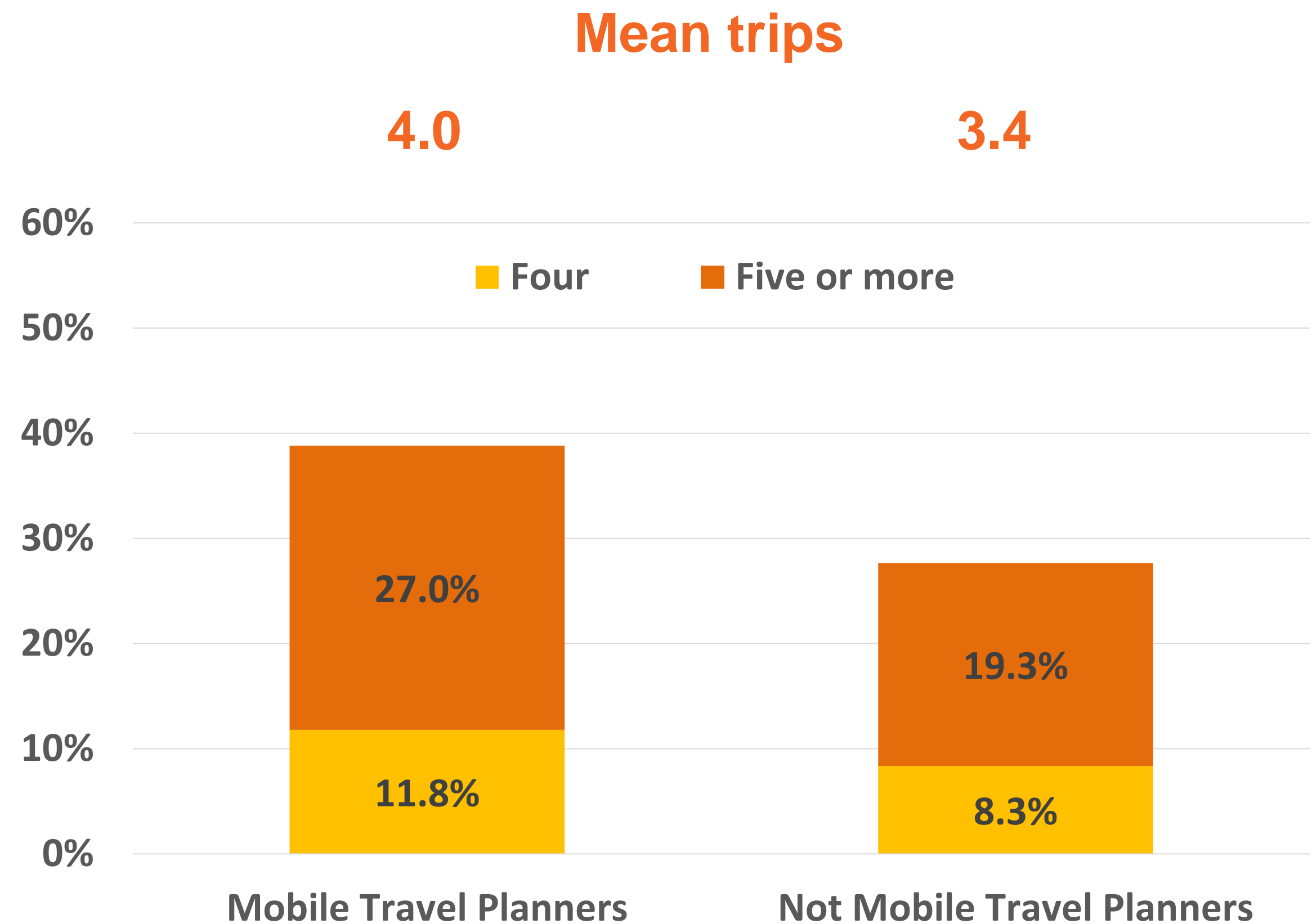
**More likely to be
female**



Question: What is your gender?

Who Are Mobile Travel Planners?

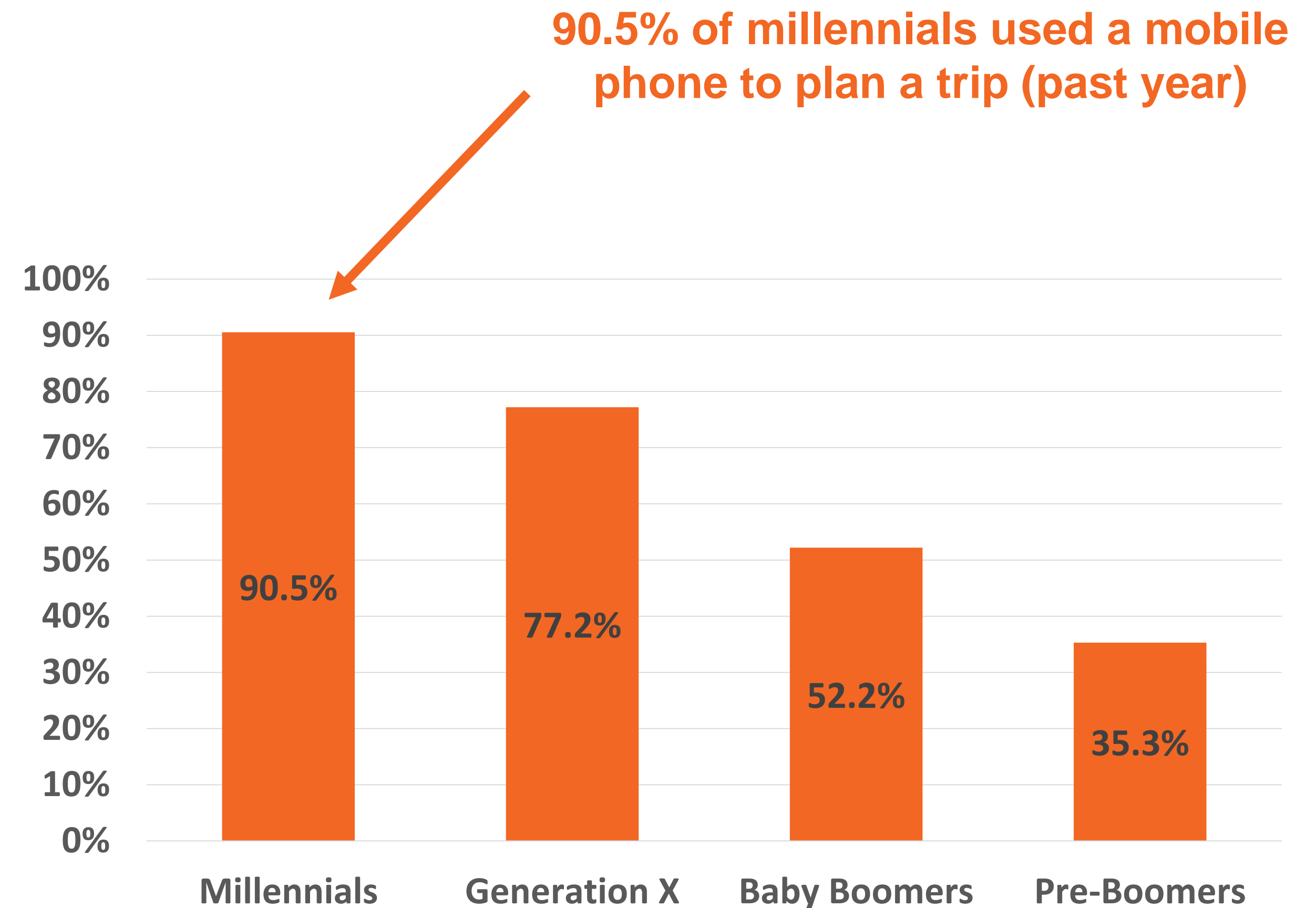
Travel more



Question: On any of the leisure trip(s) you took last year, did you bring your own children?

Who Are Mobile Travel Planners?

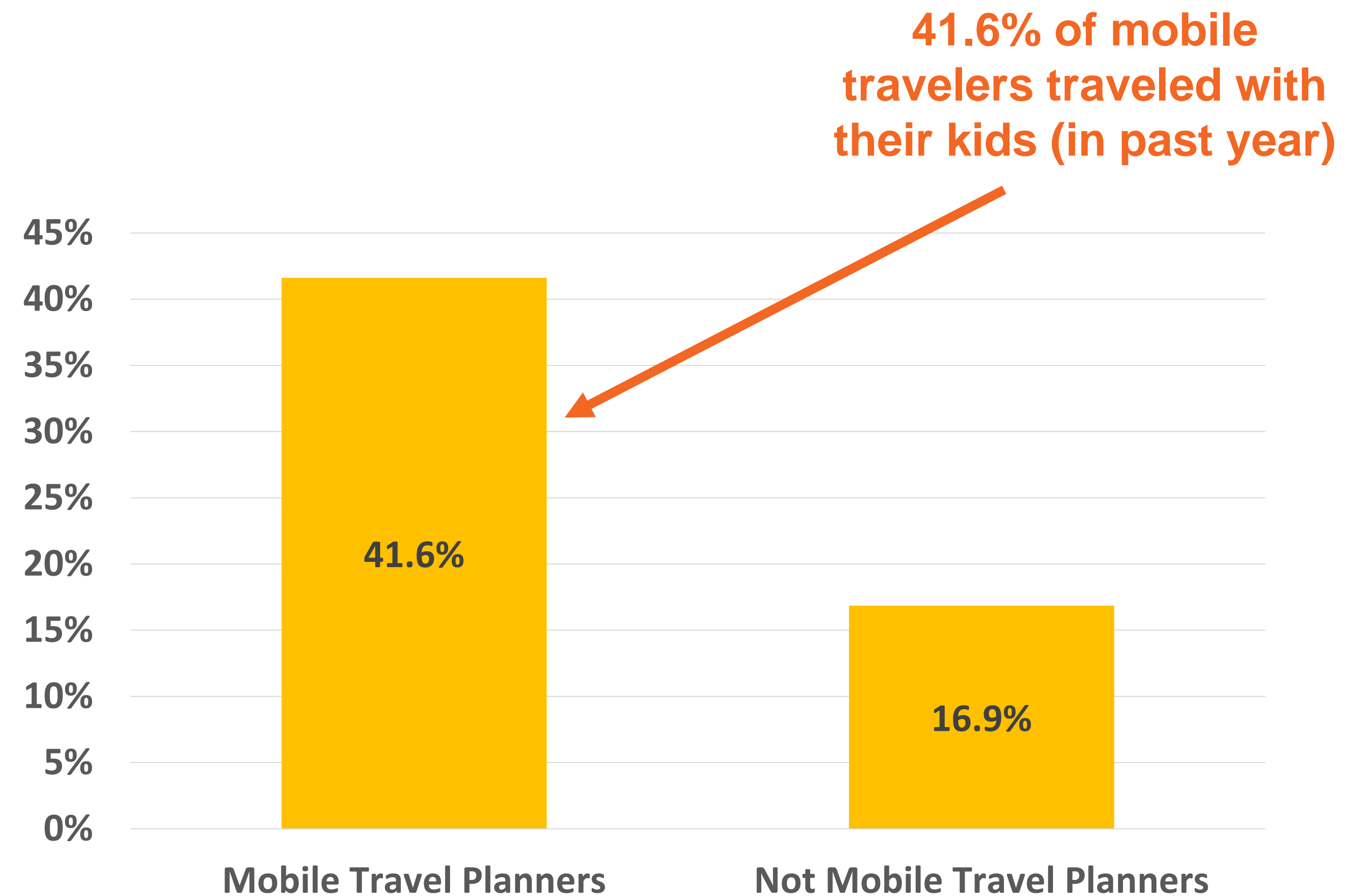
Younger



Question: In what year were you born?

Who Are Mobile Travel Planners?

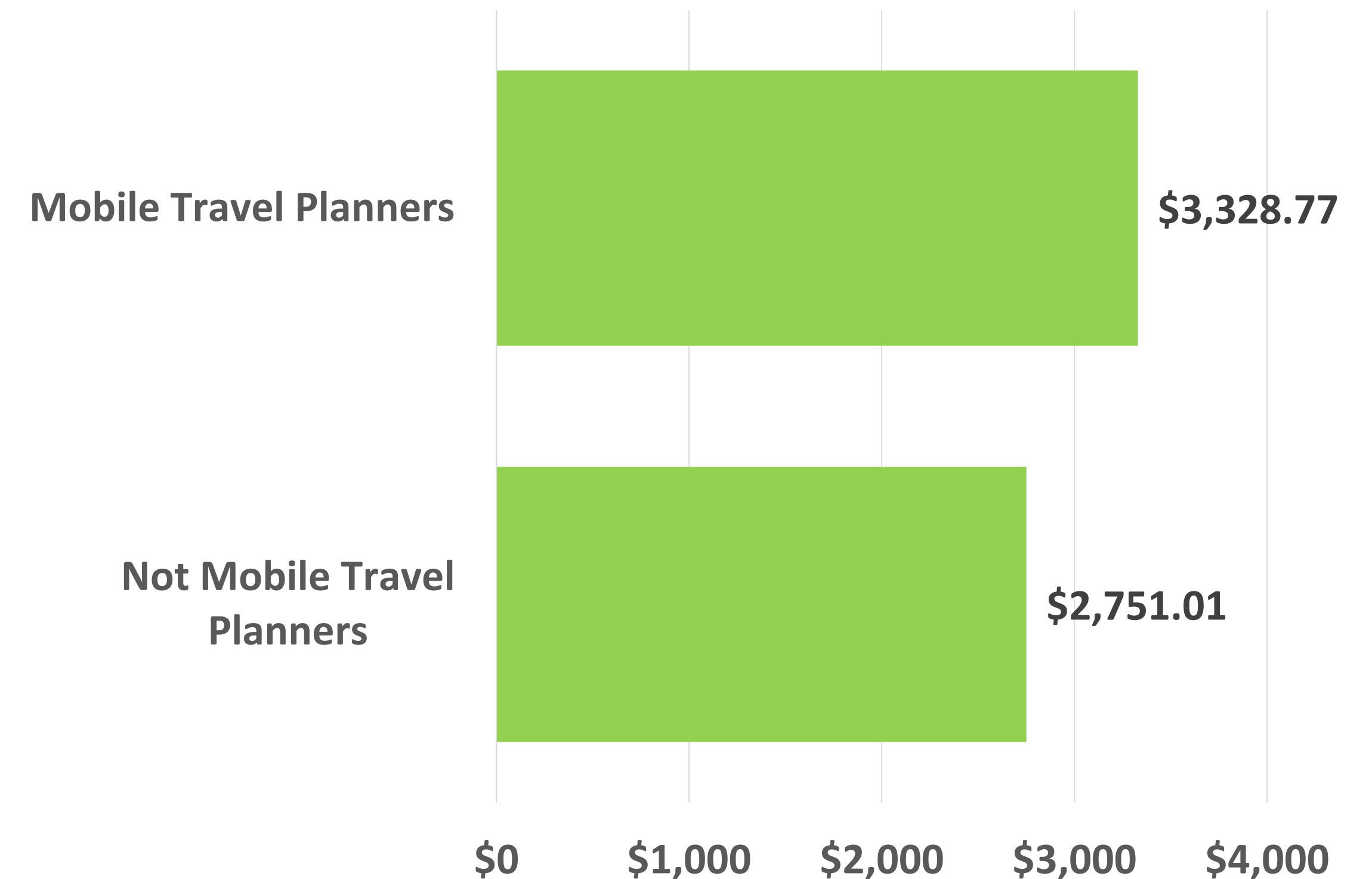
**Heavy family
travelers**



Question: On any of the leisure trip(s) you took last year, did you bring your own children?

Who Are Mobile Travel Planners?

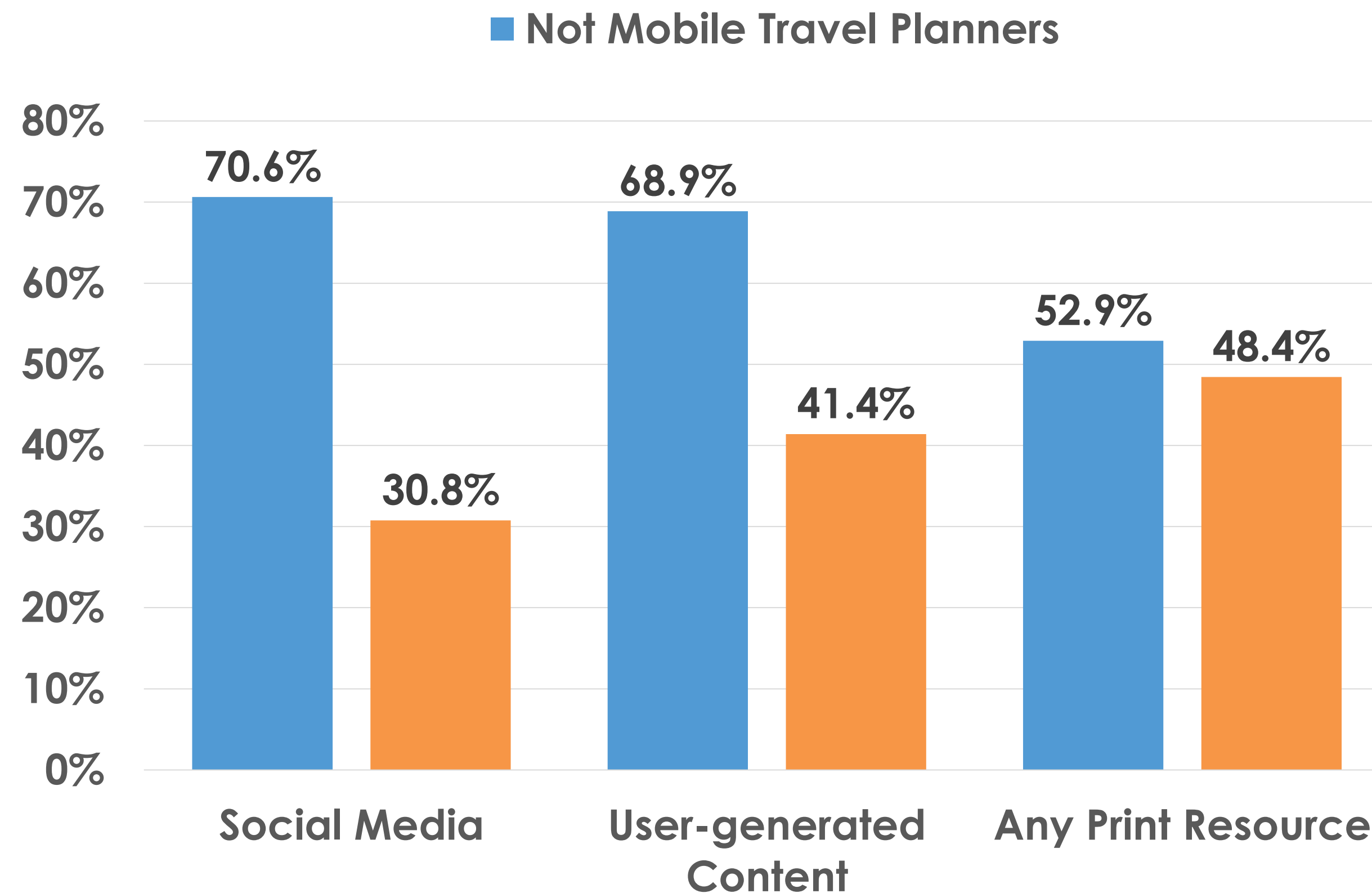
Bigger Travel Budgets



Question: How much IN TOTAL is the maximum you will spend on leisure travel (including airfare, accommodations and all other trip related spending) during the NEXT TWELVE (12) MONTHS?

Who Are Mobile Travel Planners?

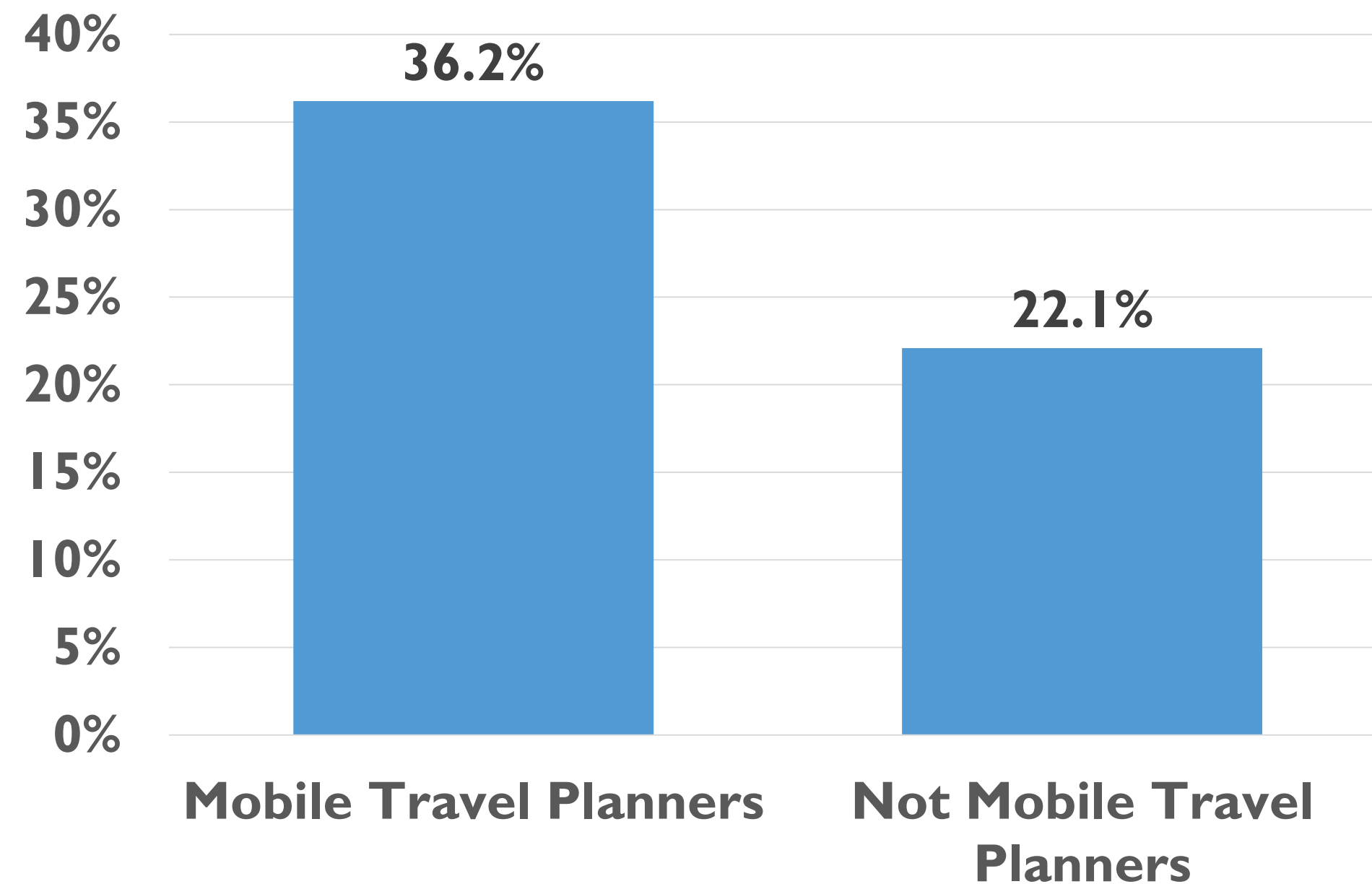
**Hyper-Informed
Travelers**



Question: In the past 12 months, have you used any of the following resources to plan any of your leisure travels?

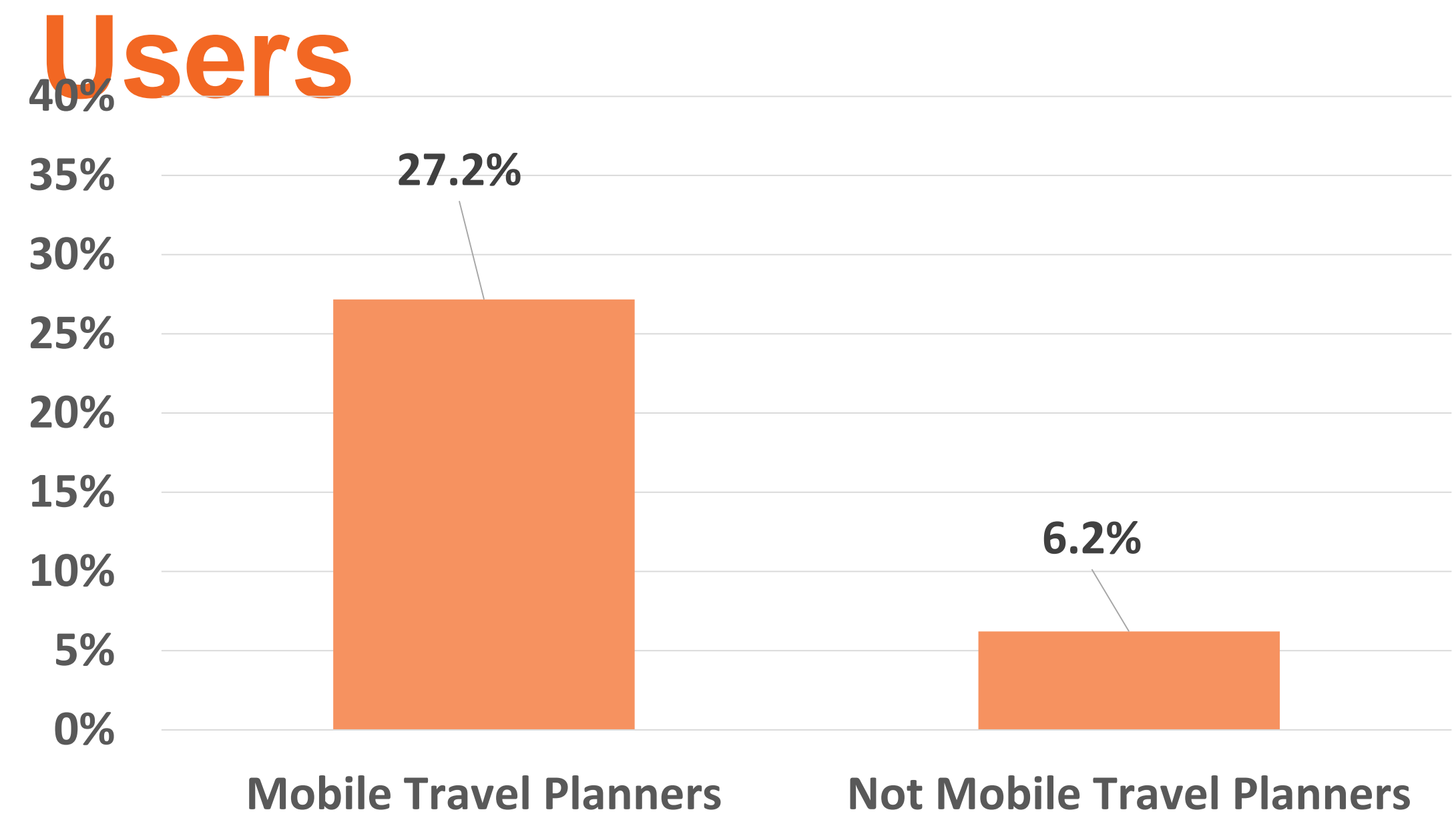
Who Are Mobile Travel Planners?

DMO Website Users



Question: In the past 12 months, have you used the official WEBSITE of a destination's local Visitors or Convention Bureau (or Chamber of Commerce), or state or national government travel office to help plan any travel?

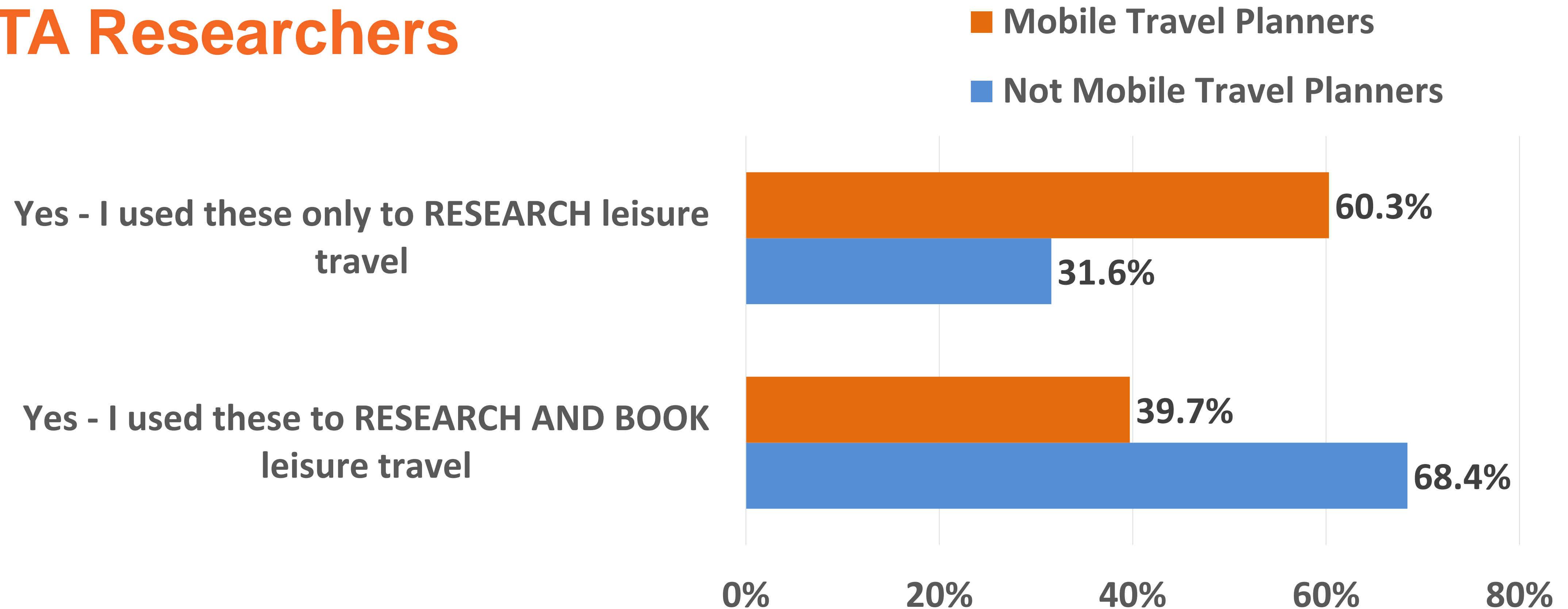
Peer-to-Peer Lodging Site Users



Question: In the past 12 months, have you used any PEER-TO-PEER LODGING WEBSITE (e.g., Airbnb and VRBO) to book any leisure accommodations?

Who Are Mobile Travel Planners?

OTA Researchers



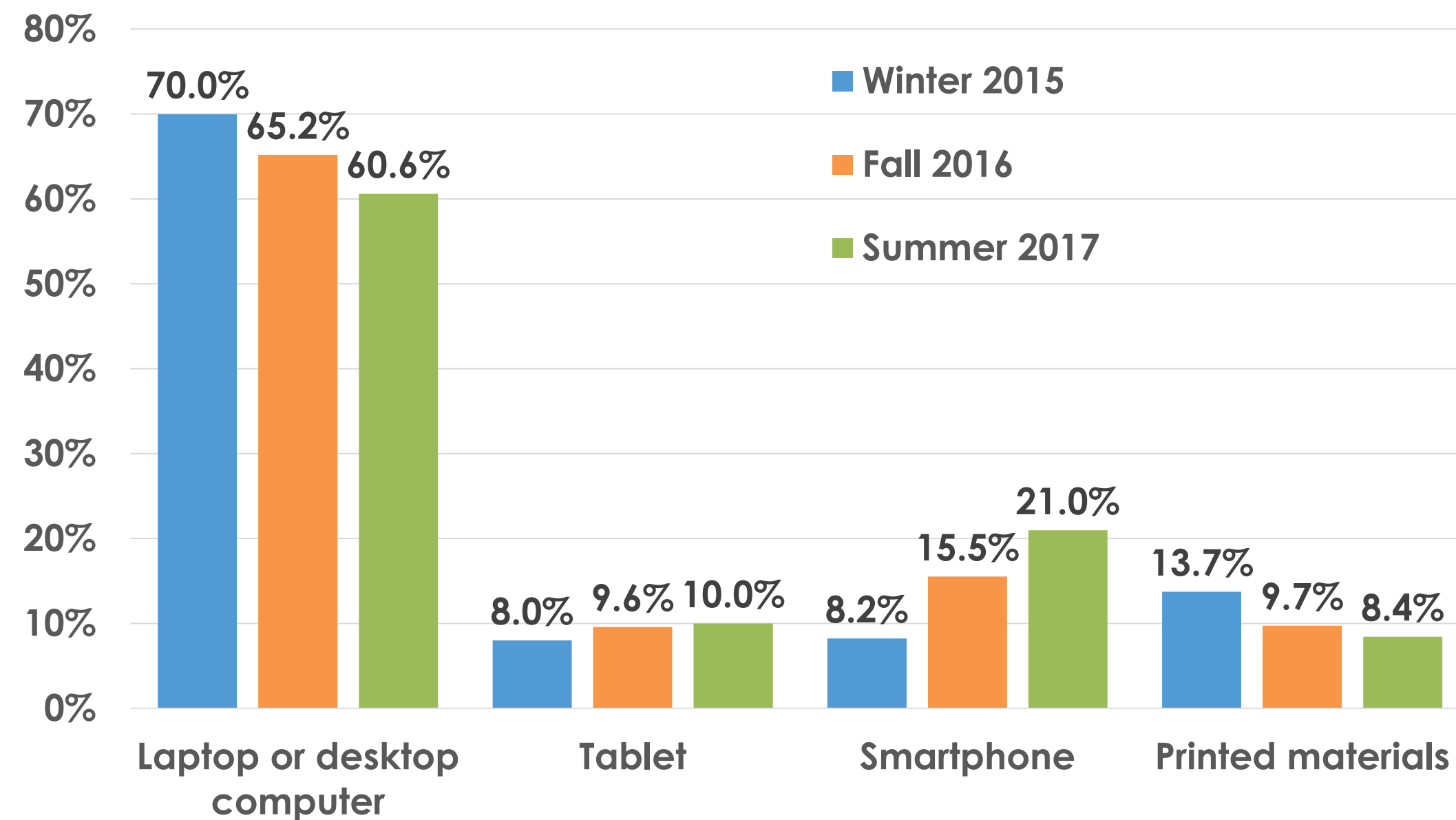
Question: In the past 12 months, have you used any ONLINE TRAVEL AGENCY websites (e.g., Expedia.com, Hotels.com, Travelocity.com, Kayak.com, Trivago.com, etc.) specifically to plan your leisure travels?

Device Usage,
Content
Consumption &
Other Behaviors

Planning Leisure Travel

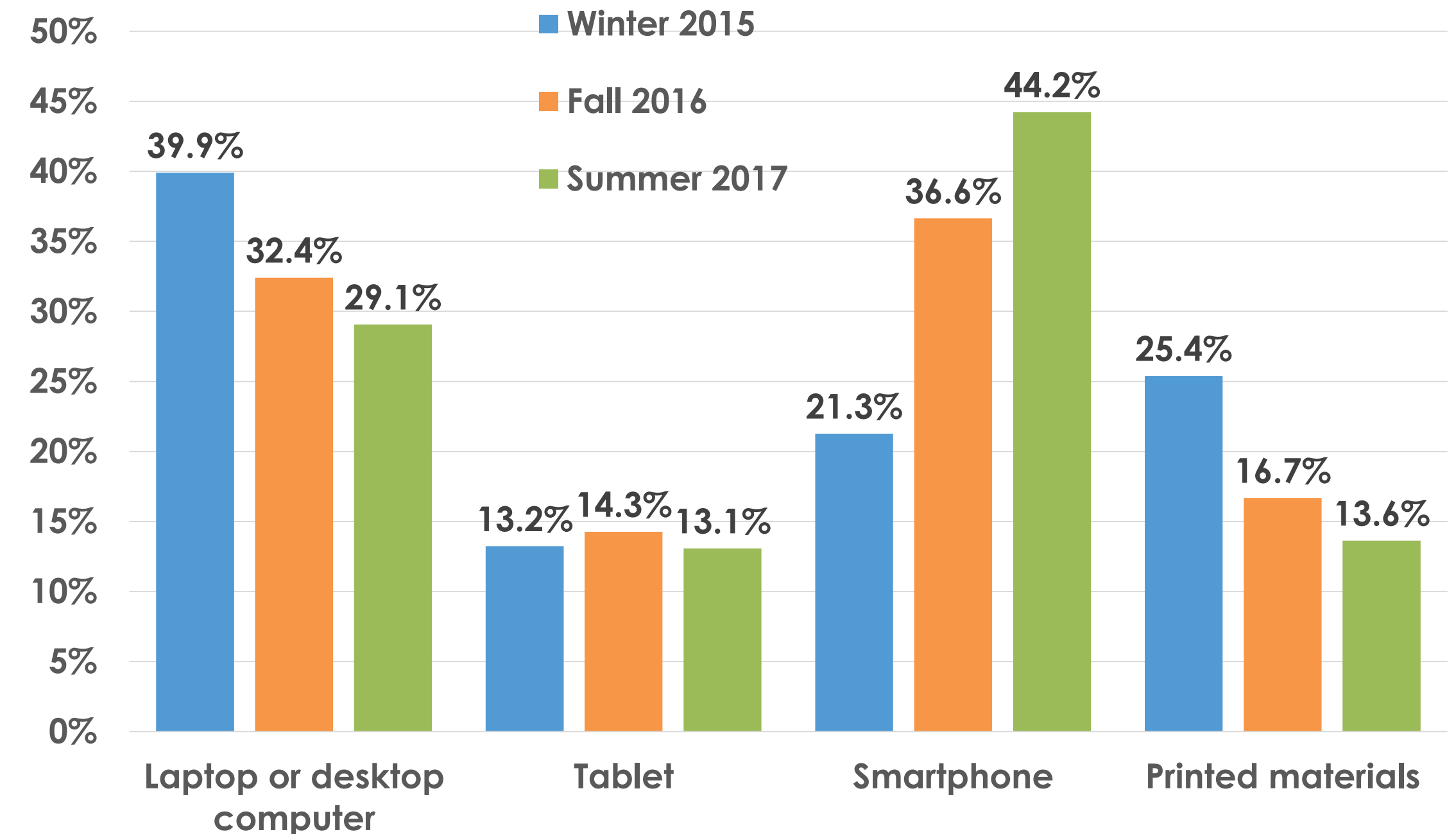
How Leisure Travel Planning is Done—Device Usage Pre/Post Trip

Before Leaving Home



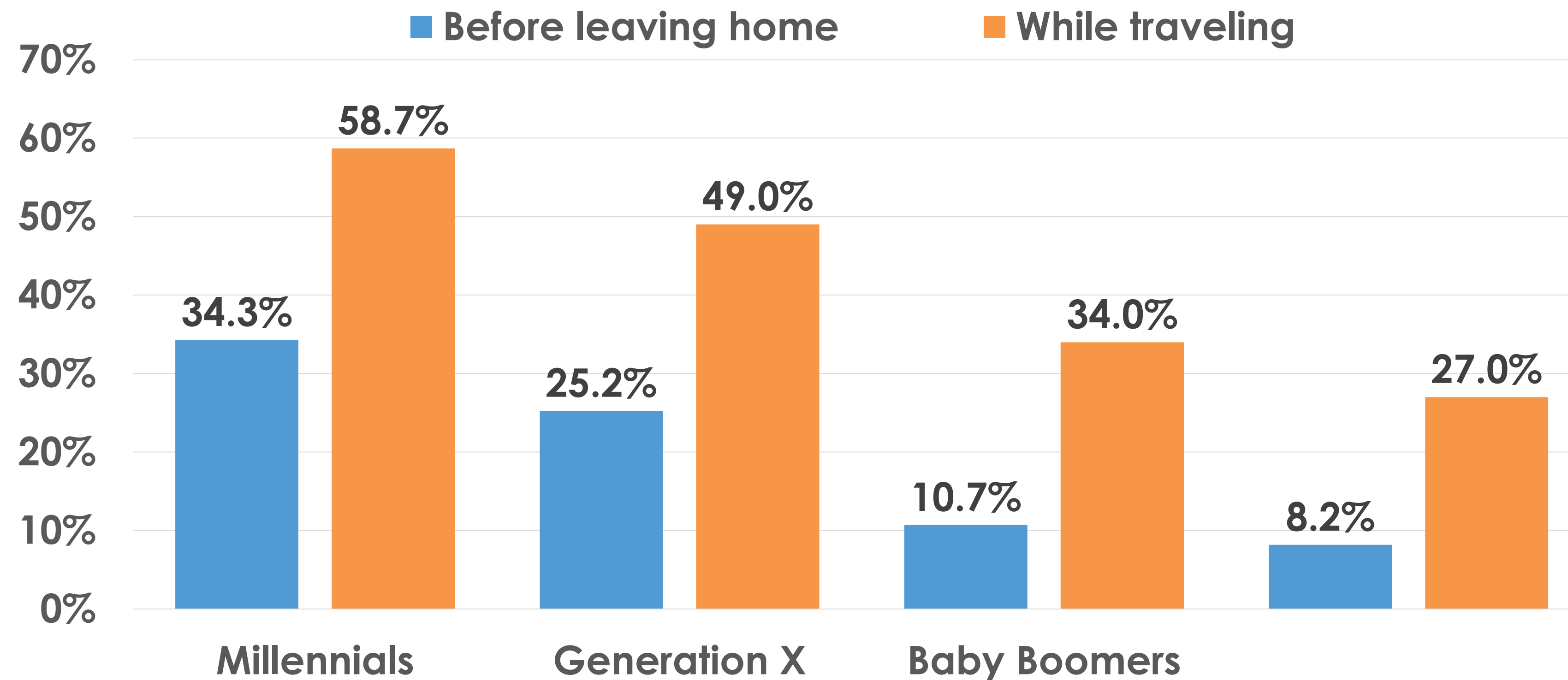
What percentage of your travel planning is typically done using each of the following before you leave for your trip?

While Traveling



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

How Leisure Travel Planning is Done—Device Usage Pre/Post Trip by Generation

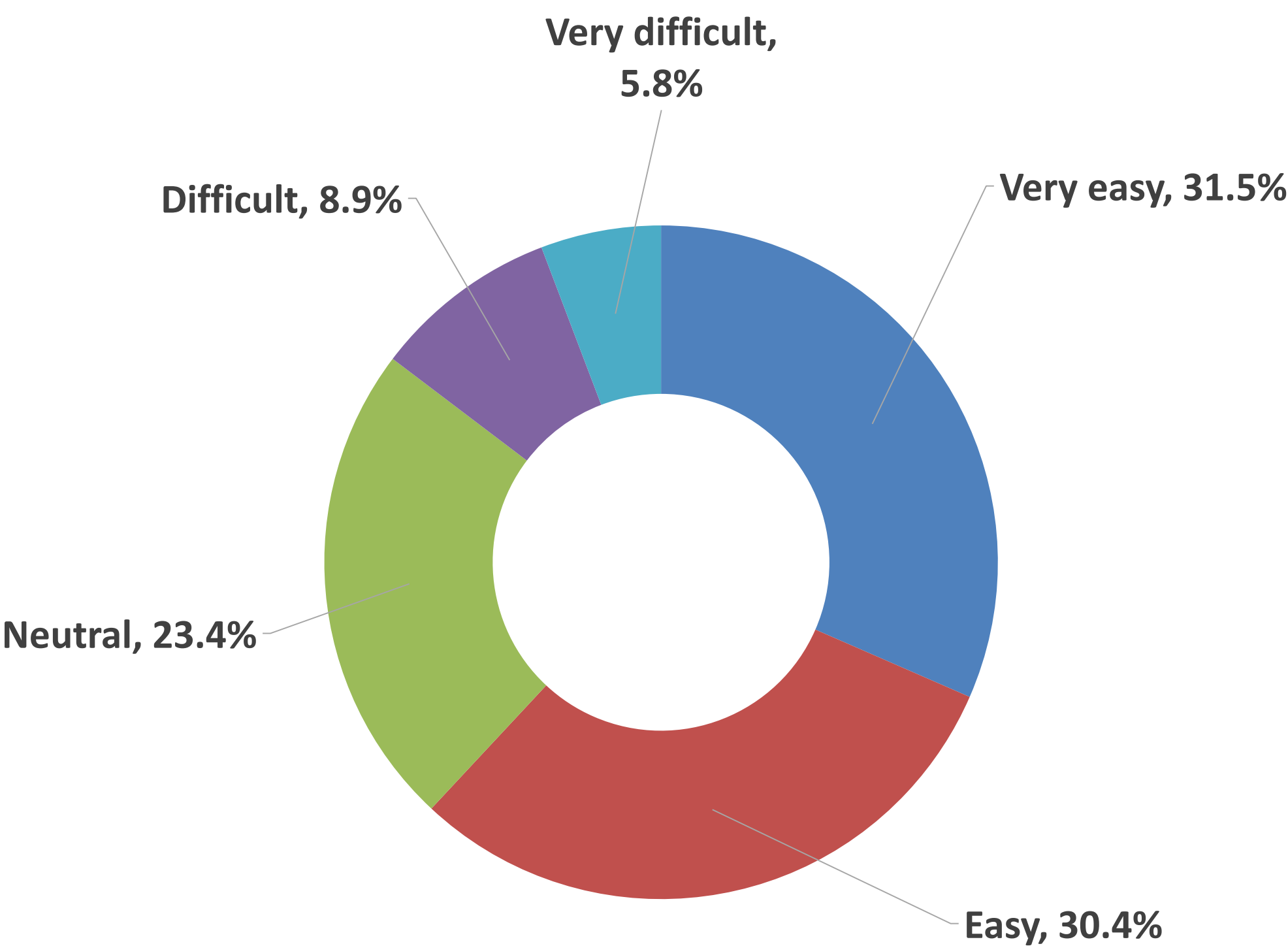


What percentage of your travel planning is typically done using each of the following before you leave for your trip?

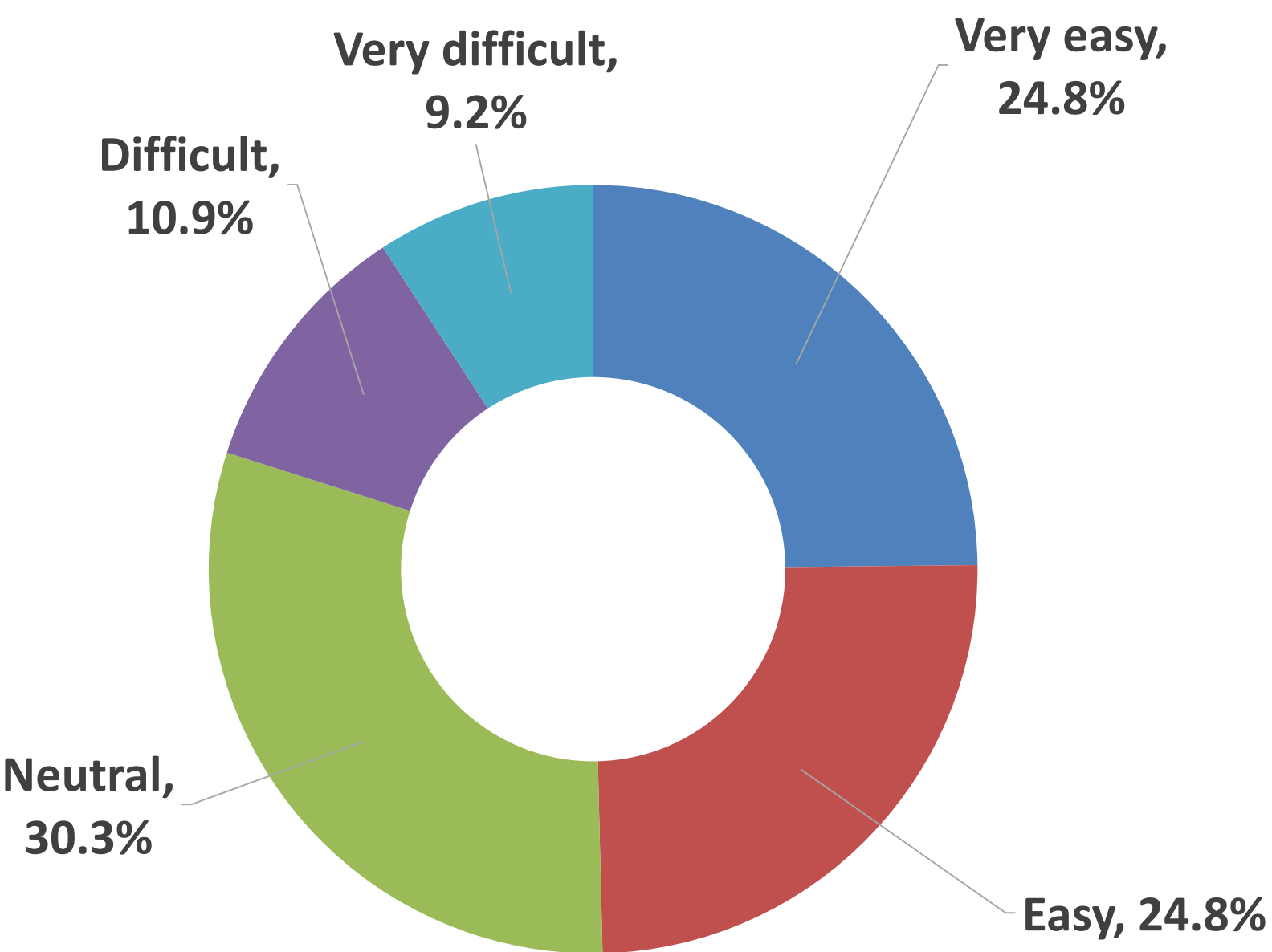
What percentage of your travel planning is typically done using each of the following while on your trips?

Ease of Planning on Mobile vs. Purchasing

Ease of planning travel on mobile devices



Question: Please think exclusively about researching your travels PRIOR TO TRAVELING OR PURCHASING travel products. In your experience, how easy is using your mobile phone to research and find travel information?

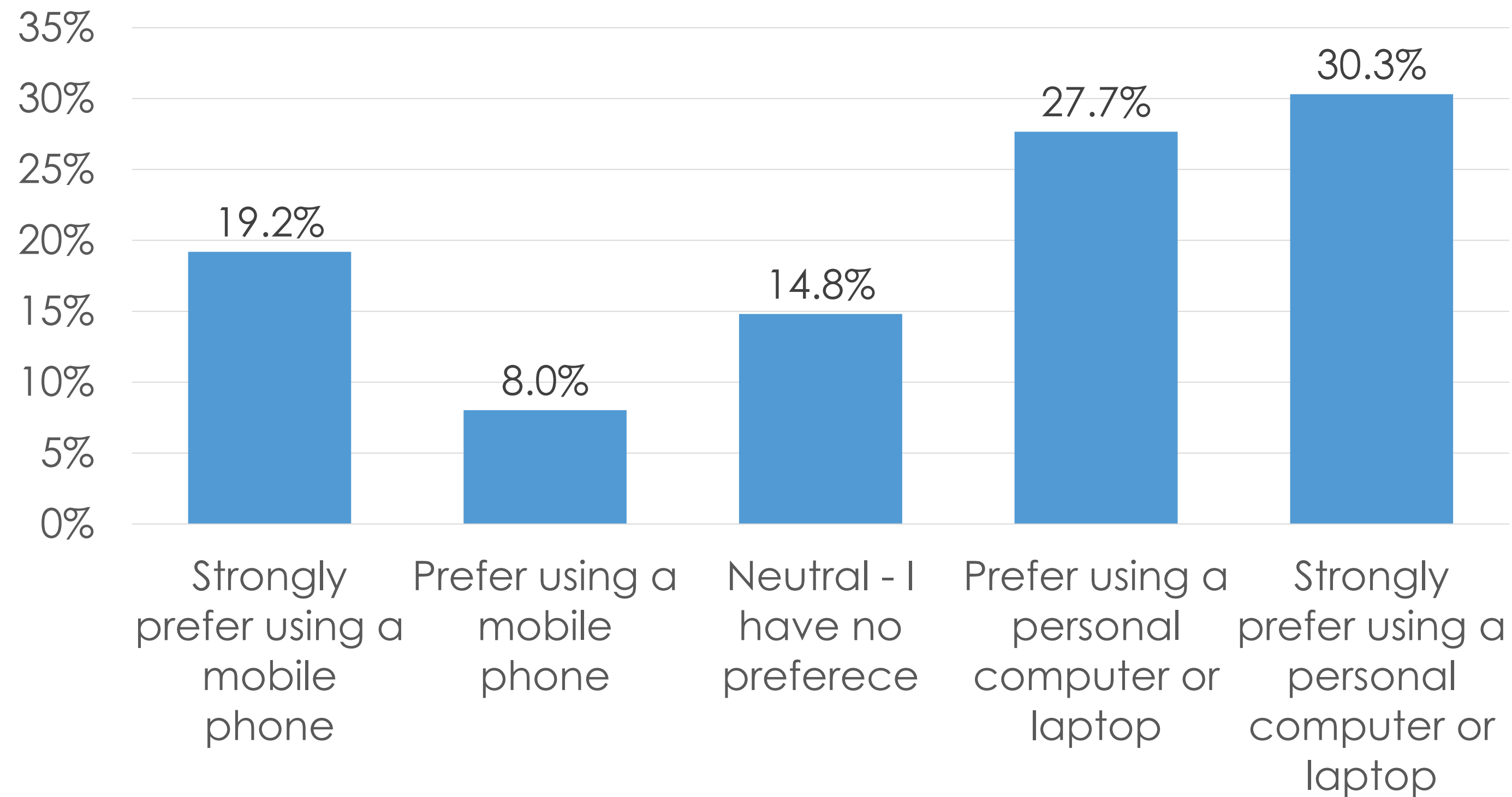


Question: Please think exclusively about MAKING TRAVEL PURCHASES using your mobile phone. In general, how easy do you find using your mobile phone to purchase or book travel products and services (hotels, flights, etc.)?

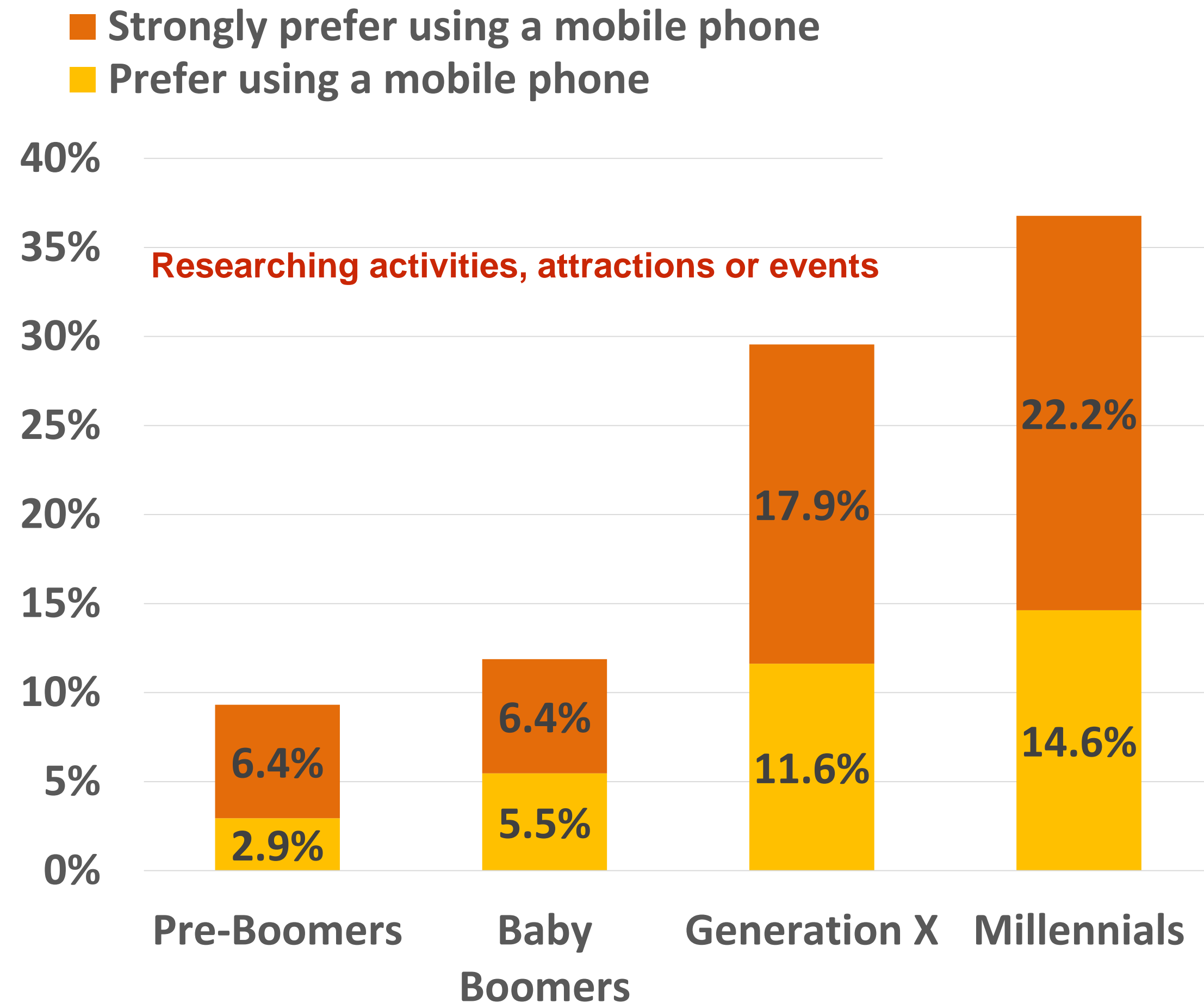
Preferred Device for Travel Activities Research

If you were given the choice of using a mobile phone or a desktop or laptop computer, which would you generally prefer?

Researching activities, attractions or events



Prefer Using Mobile Phone Over Laptop/Desktop



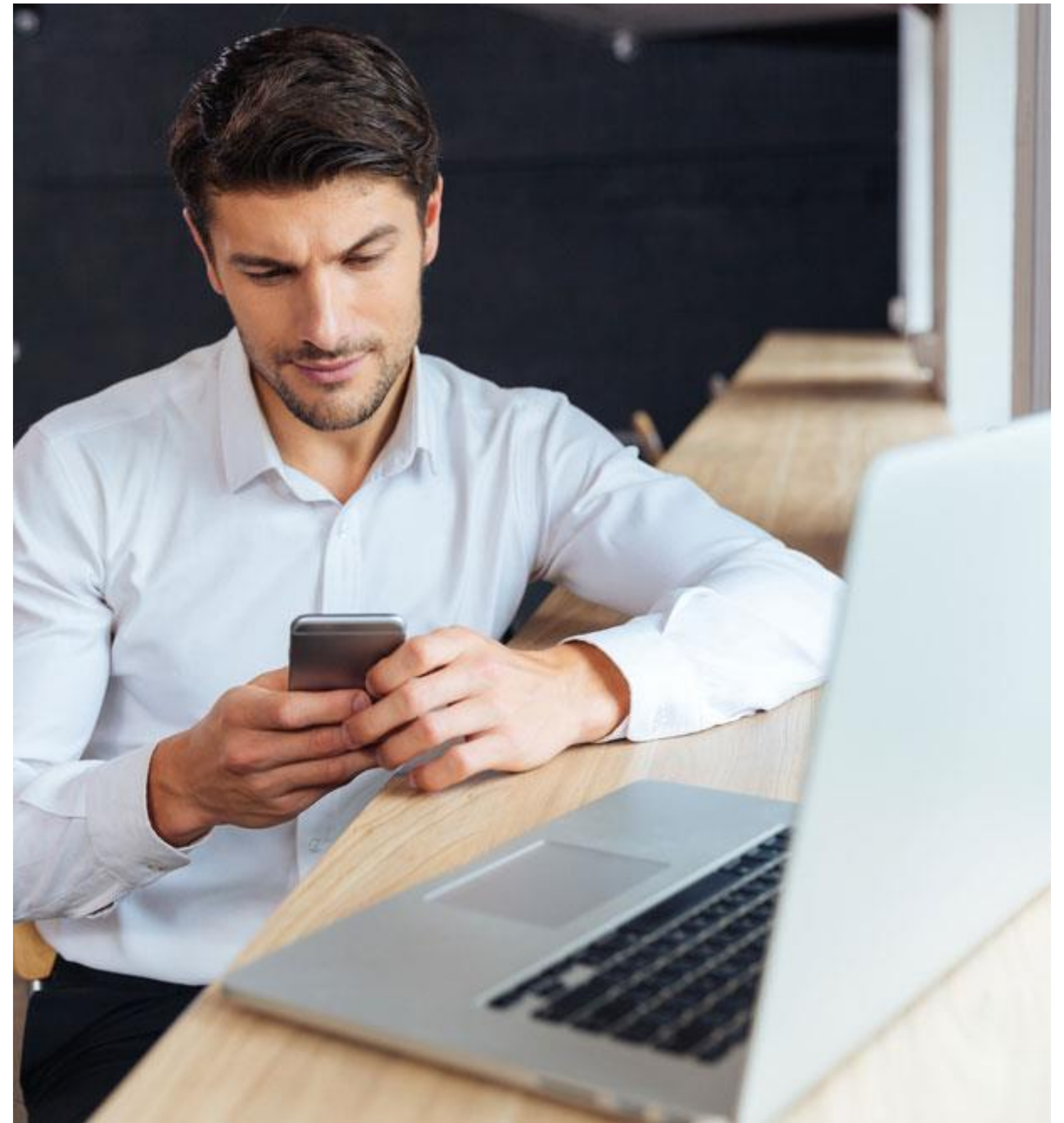
A major divide exists between older and younger generations in their preferences for mobile planning.

If you were given the choice of using a mobile phone or a desktop or laptop computer (PC or Mac), which would you generally prefer to use for each of these travel planning tasks?

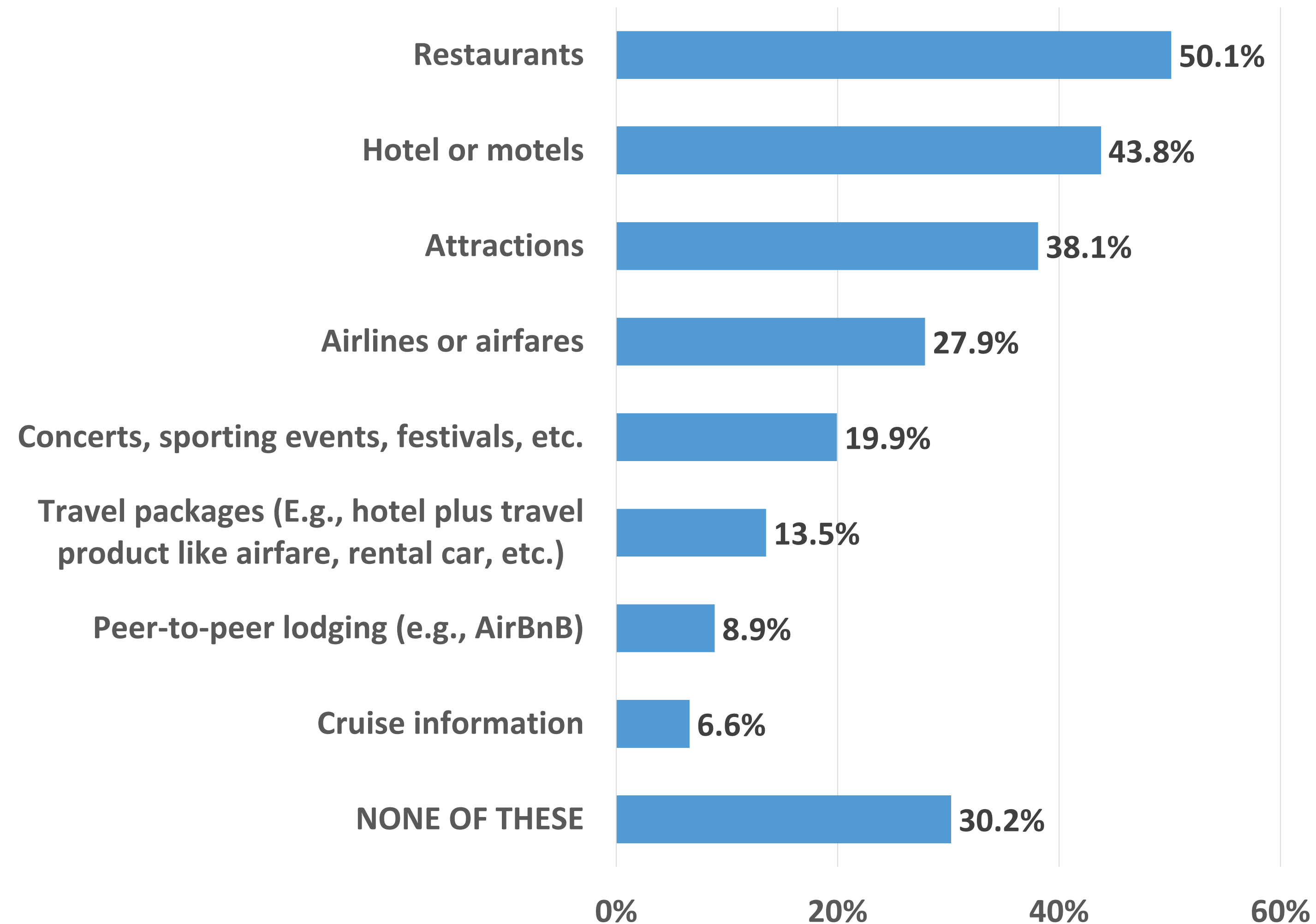
Other planning tasks?

The same story...

- *Buying tickets to activities, attractions or events*
- *Researching hotels or lodging*
- *Booking hotel accommodations*
- *Researching restaurants*
- *Making restaurant reservations*



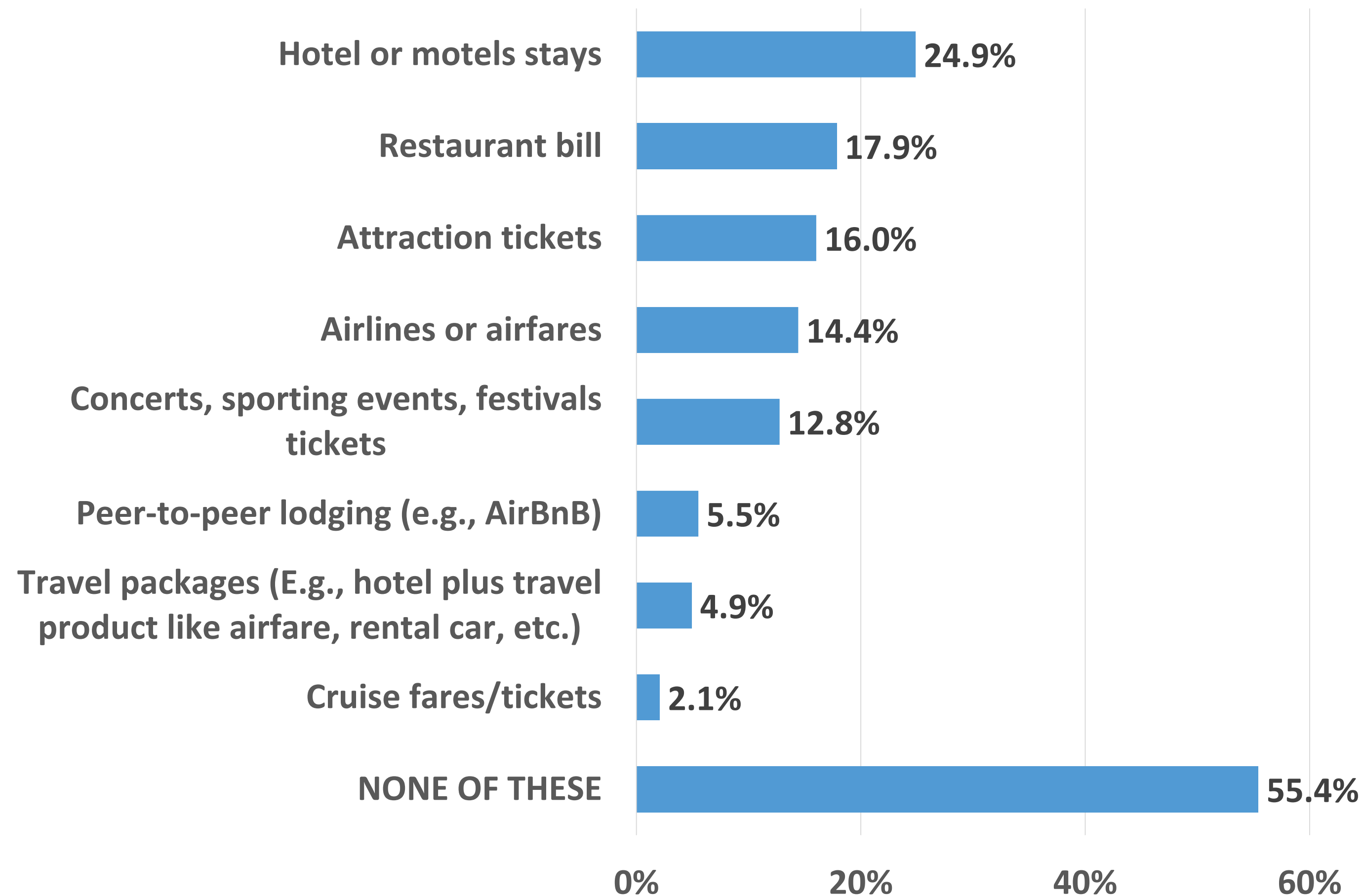
Travel Research Done on Mobile Phones



Question: While planning a leisure trip the PAST TWELVE (12) MONTHS, which of the following have you researched using your mobile phone? (Select all that apply)



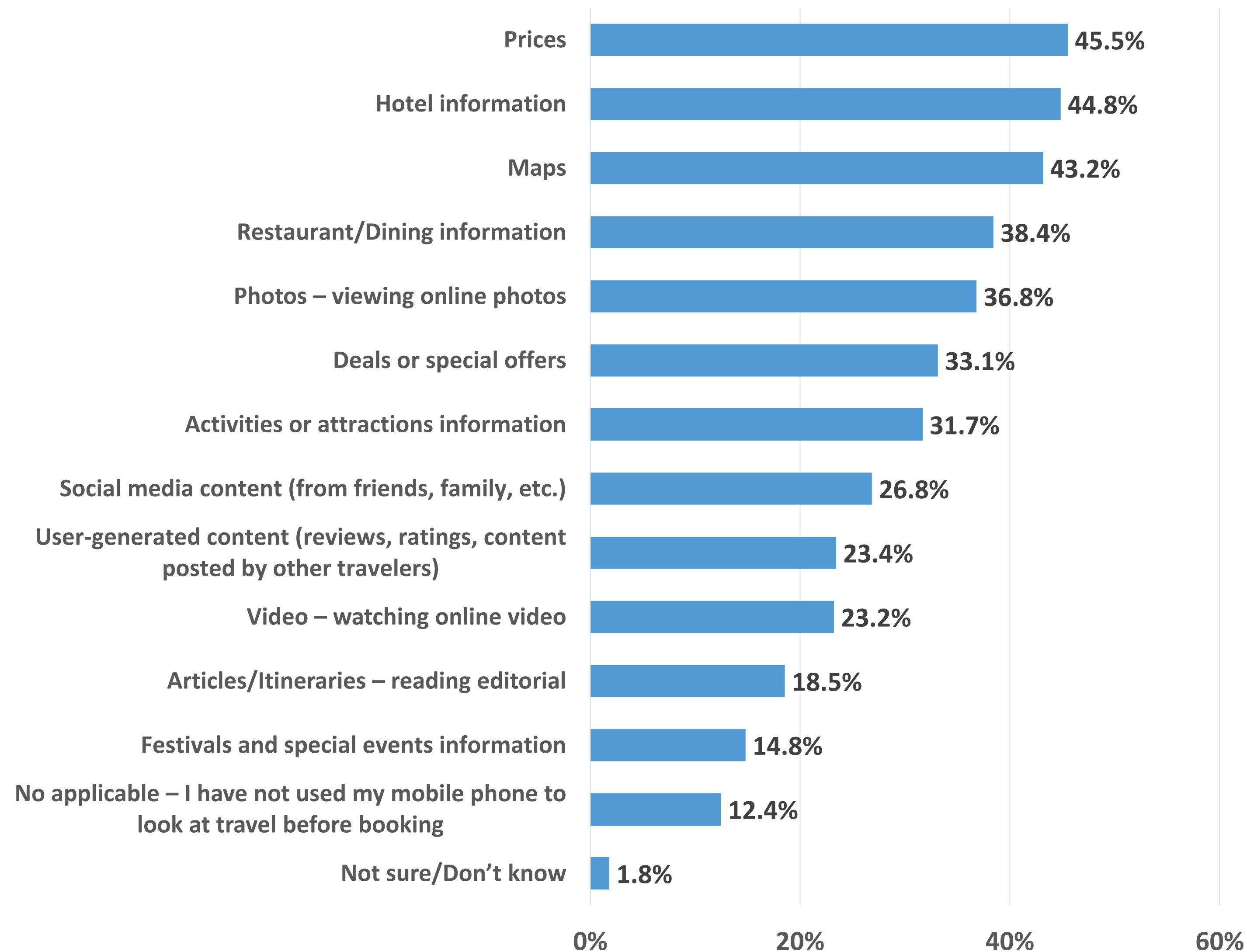
Travel/Trip Purchases Made on Mobile Phones



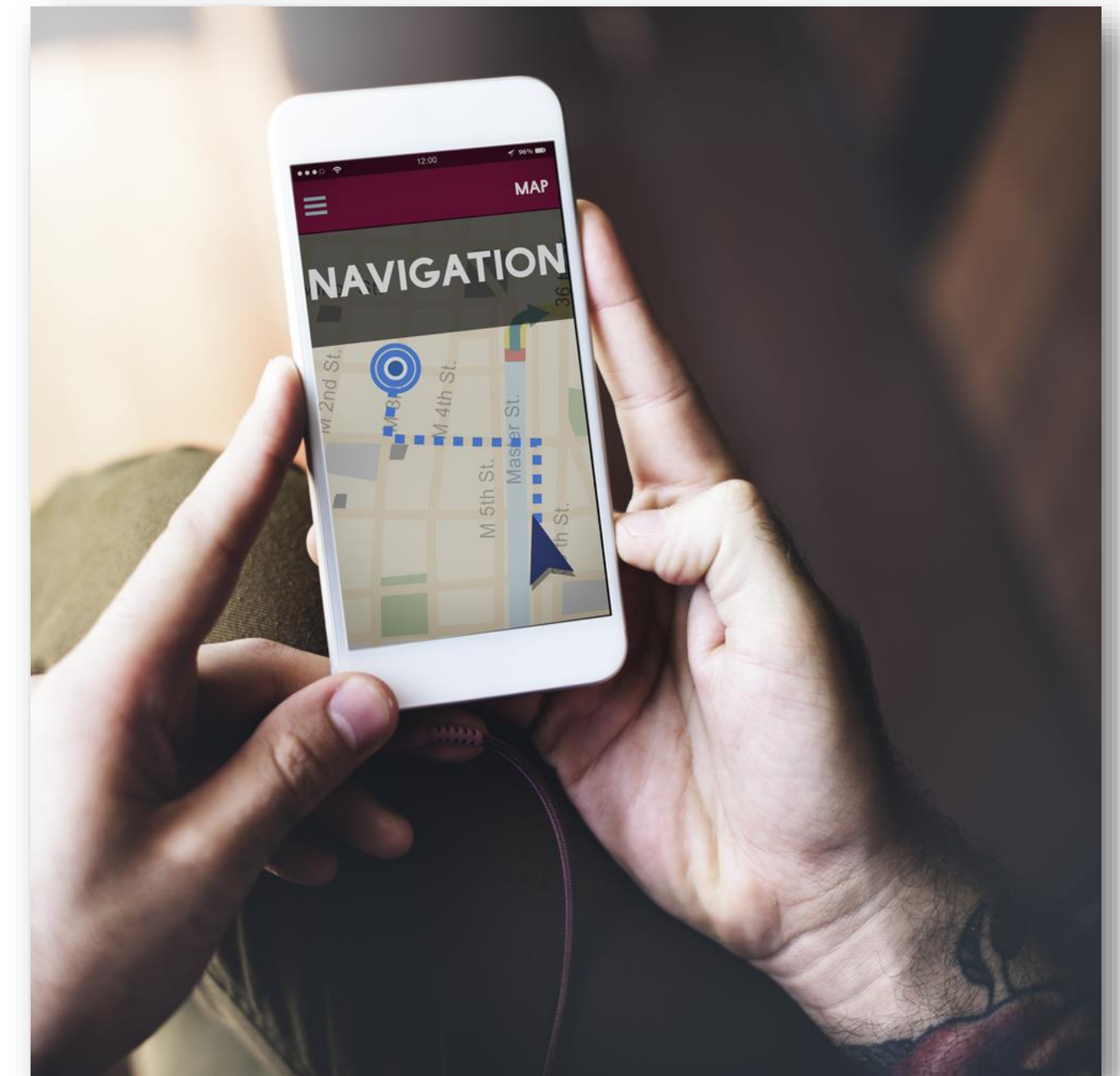
Question: Now, please think about purchases made with your mobile phone. In the PAST TWELVE (12) MONTHS, which of the following have you purchased using your mobile phone?



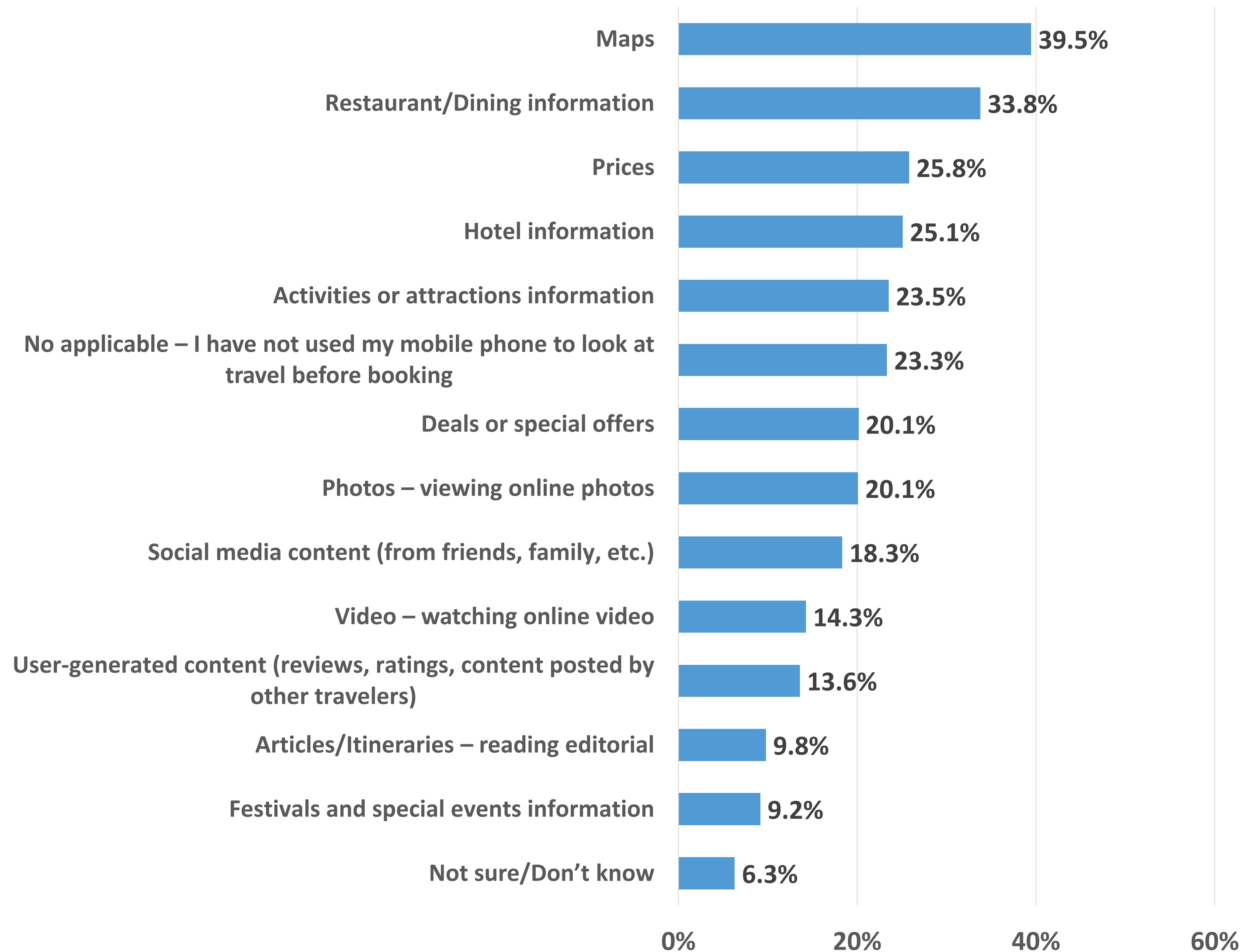
Travel Planning Info Researched (Before Booking Trip on Mobile Phone)



Question: Please think about the last time you used a mobile phone to plan a leisure trip. BEFORE actually booking your travel, which of the following resources did you use (on your mobile phone) to plan your trip? (Select all that apply)



Travel Planning Info Researched on Mobile Phone (In-Market)



Question: Again, please think about the trip where you last used a mobile phone to plan a leisure trip. WHILE traveling WITHIN YOUR DESTINATION (City, Region, State), which of the following resources did you use (on your mobile phone) to plan your trip?

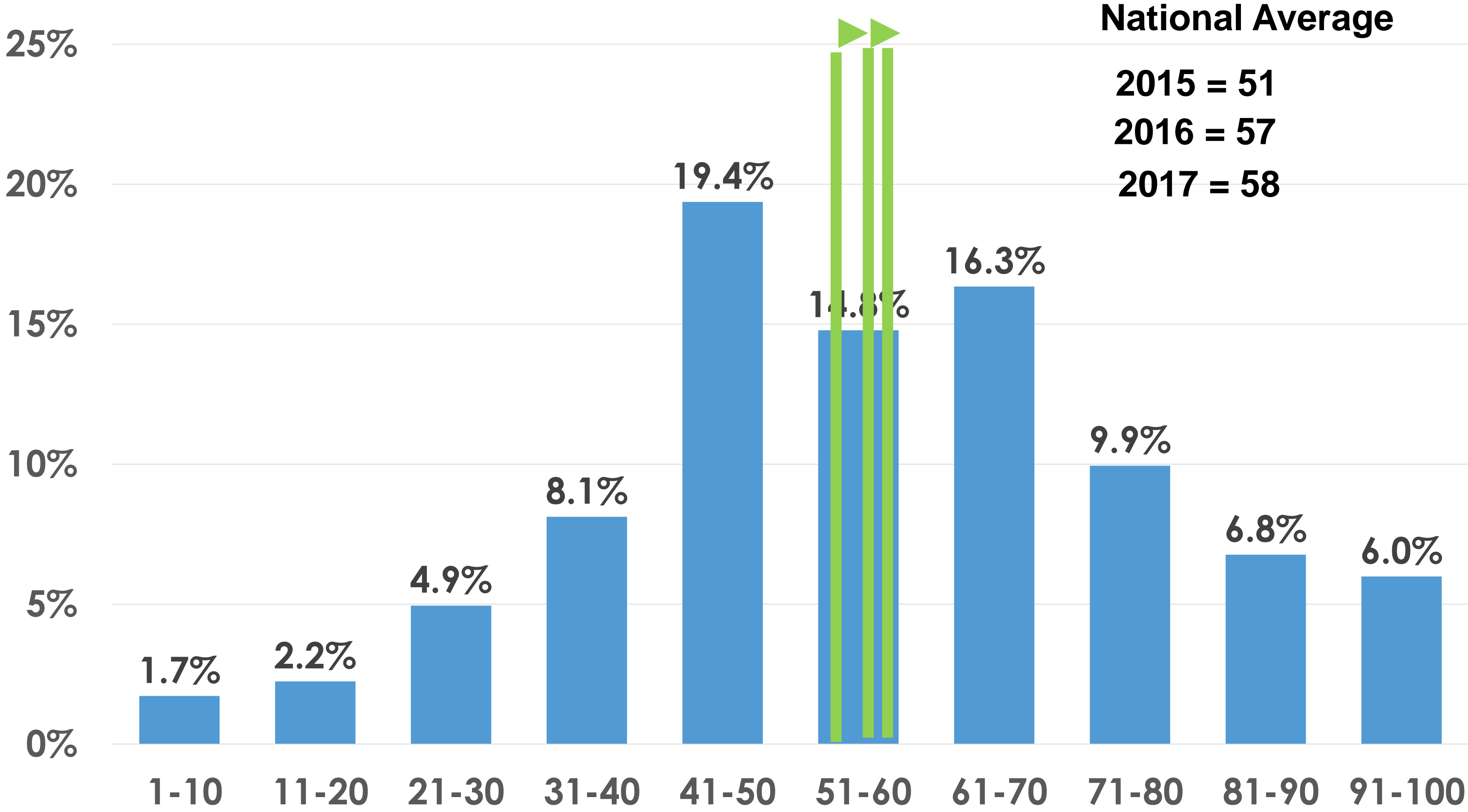




Destination Analysts' *Mobile Addiction Test*

- **Scored on 6 questions on:**
 - **Behaviors and emotions regarding mobile phones**
- **Based on standard addiction self-assessment test methodologies**
- **Each respondent scored from 1 to 100**
- **Measured three times:**
 - **January 2015**
 - **October 2016**
 - **October 2017**

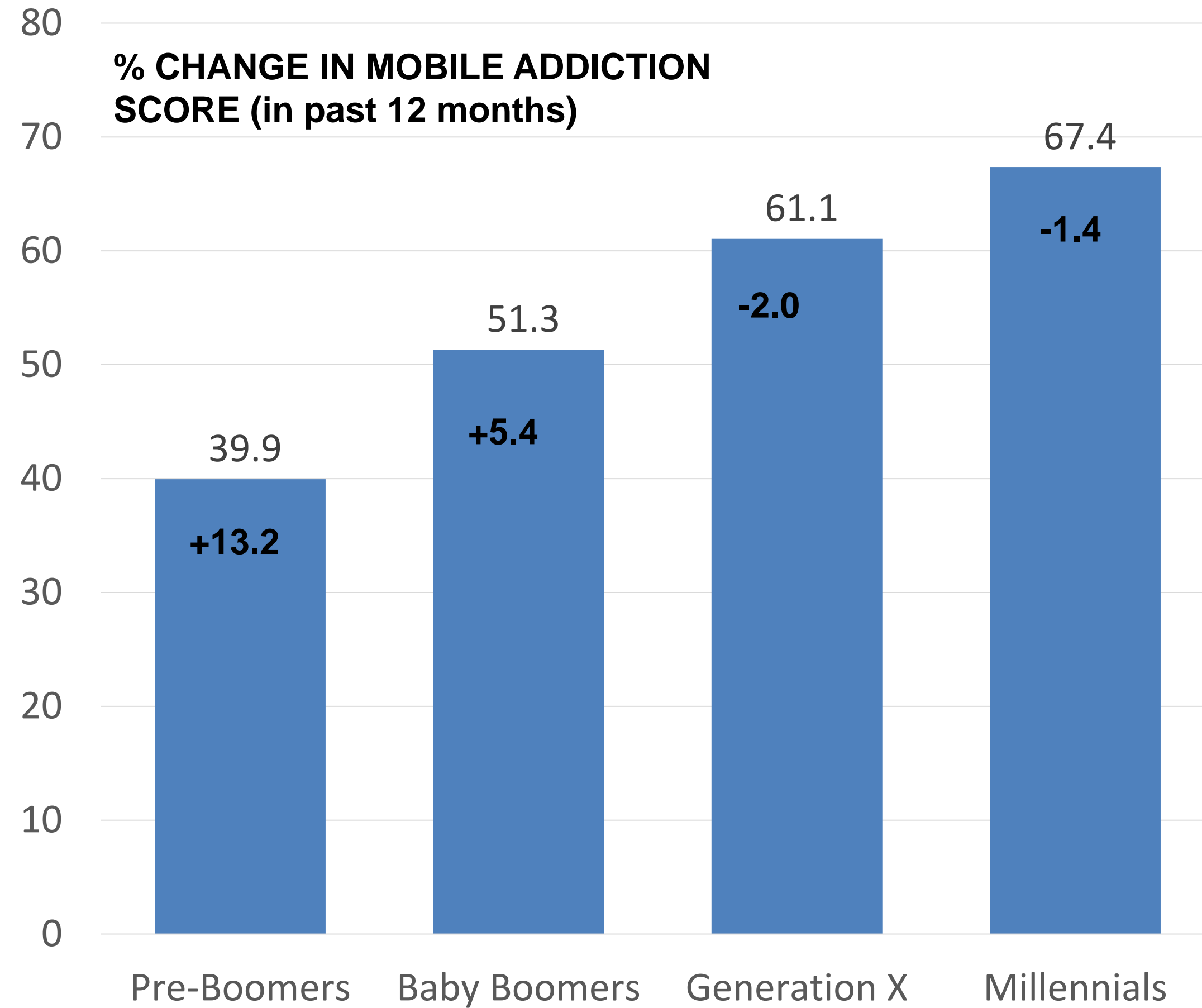
Mobile Phone Addiction Spectrum



Less addicted <<<<----->>>> *More addicted*

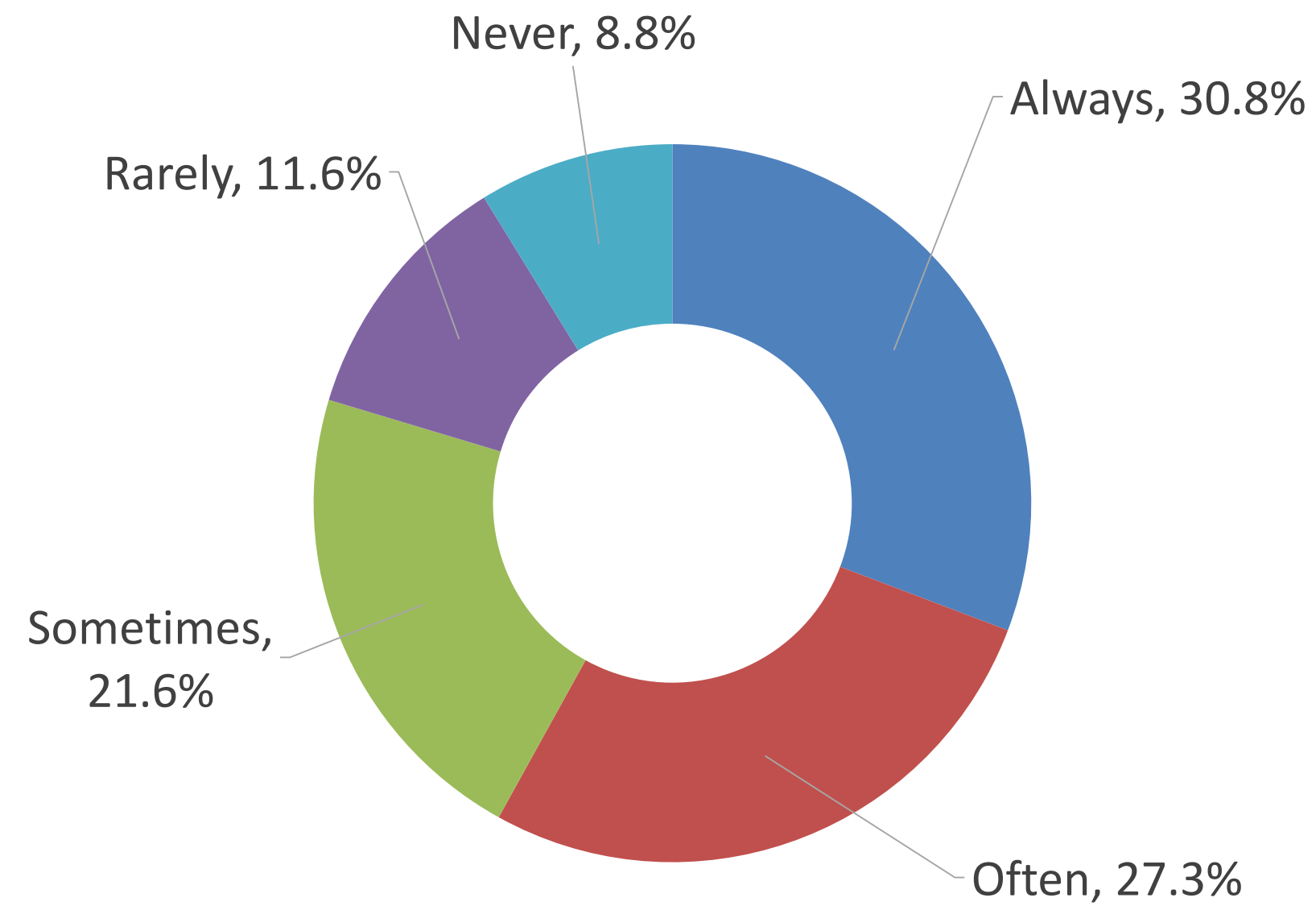
Mobile Phone Addiction Score, Sept. 2016

Generational Perspective



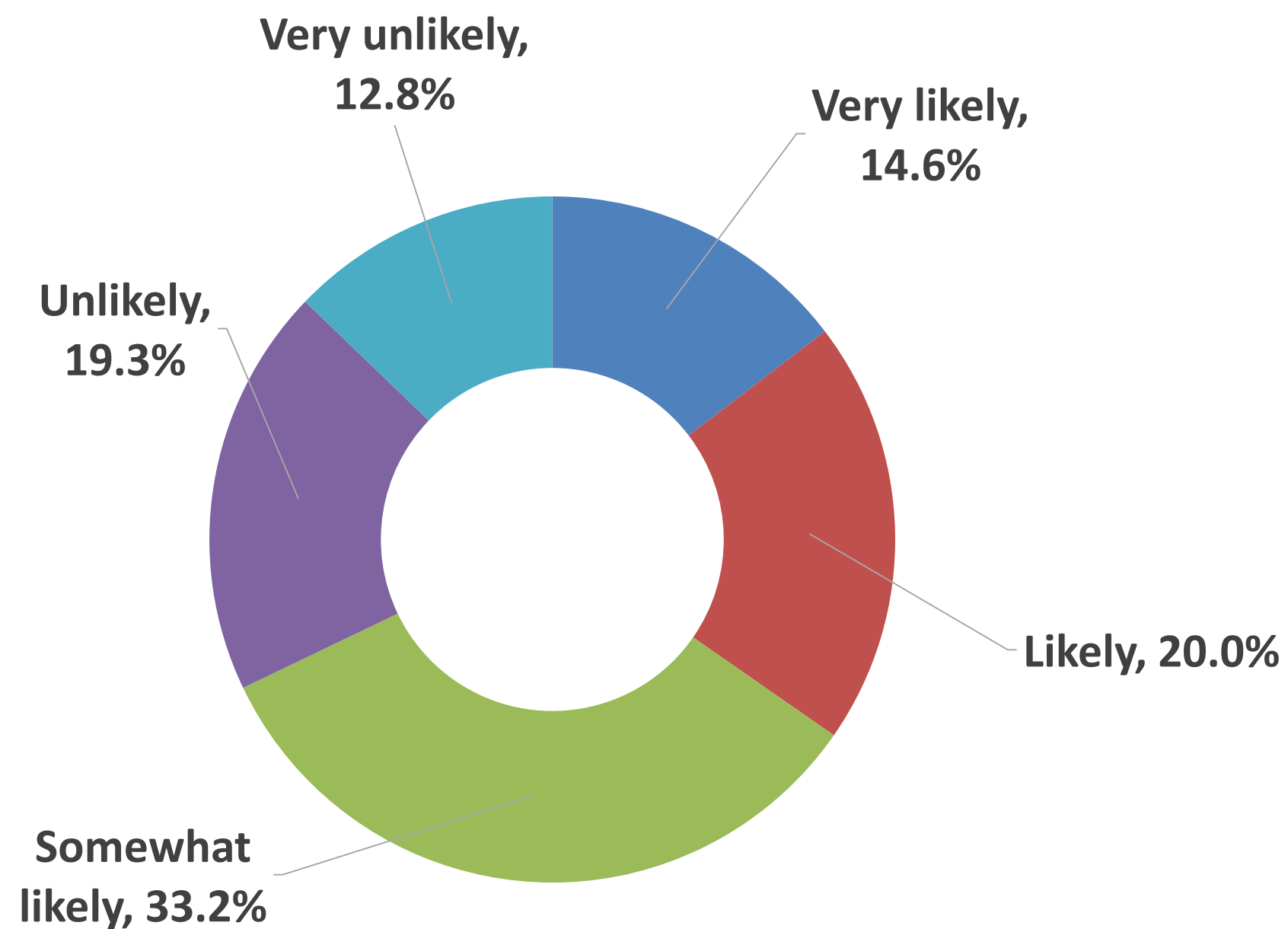
Travelers' Relationships with their Mobile Devices

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

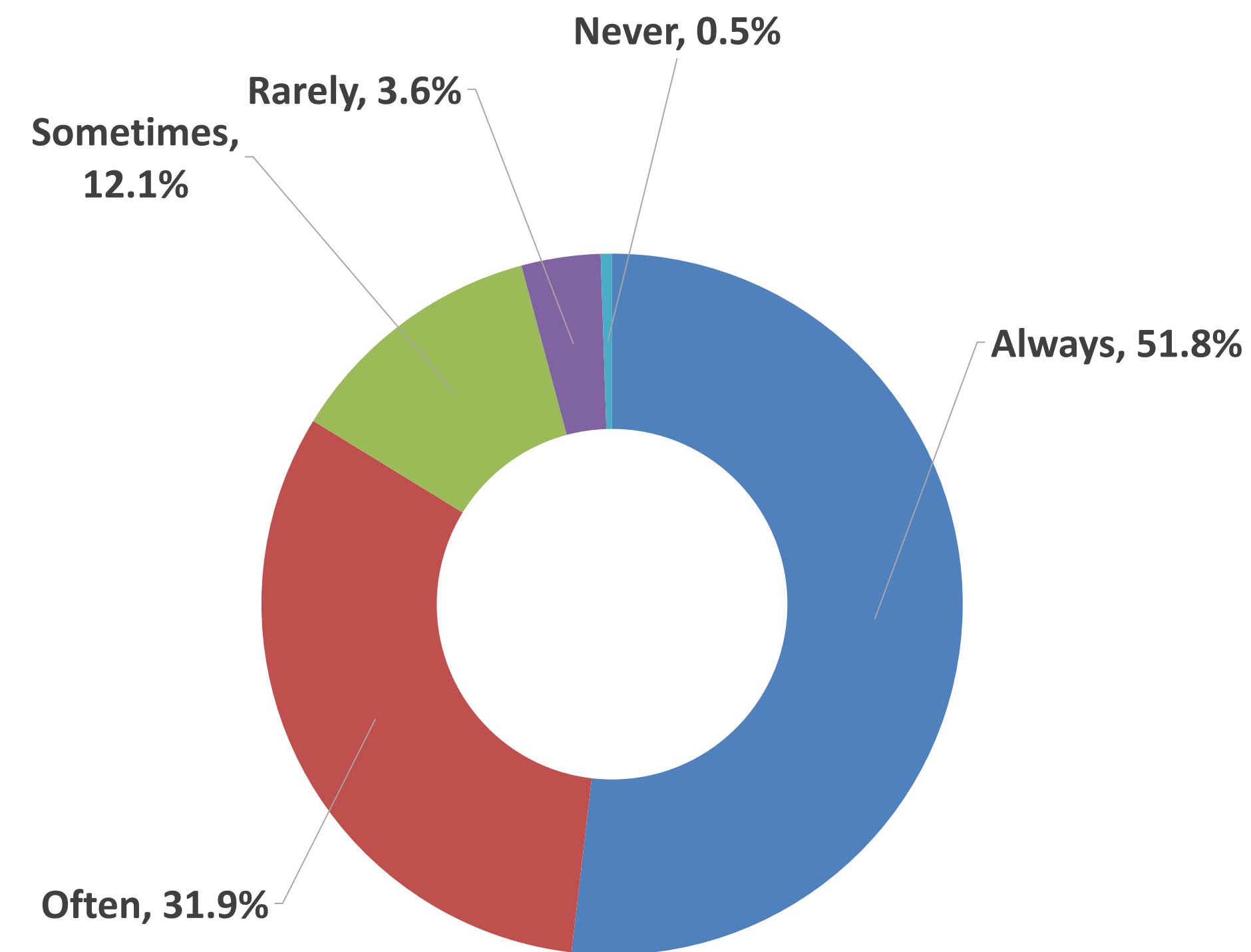


Travelers' Relationships with their Mobile Devices

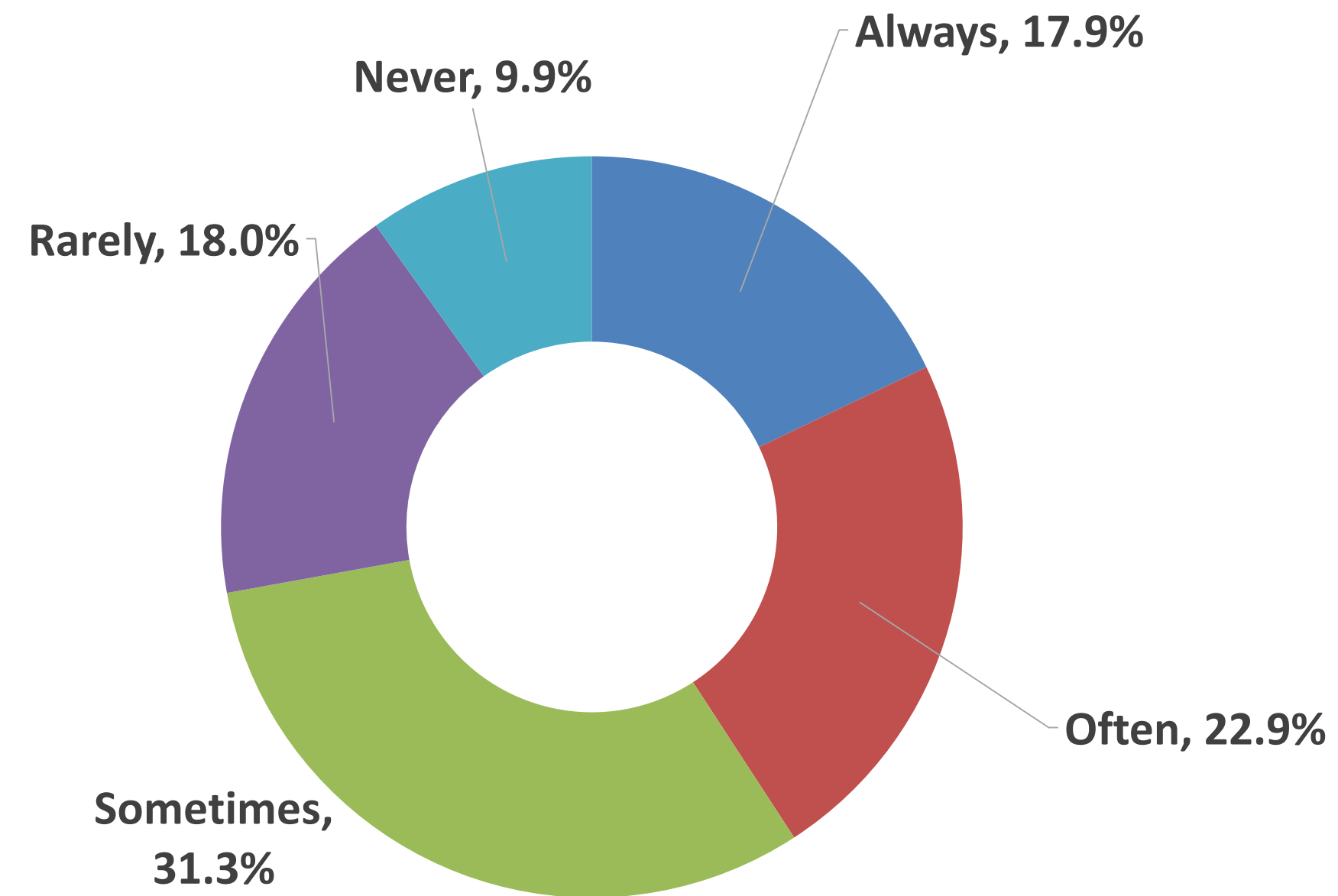
When you are using your mobile device in the company of friends and family, how likely are you to **FEEL GUILTY** (even if momentarily) that you are not interacting with them?



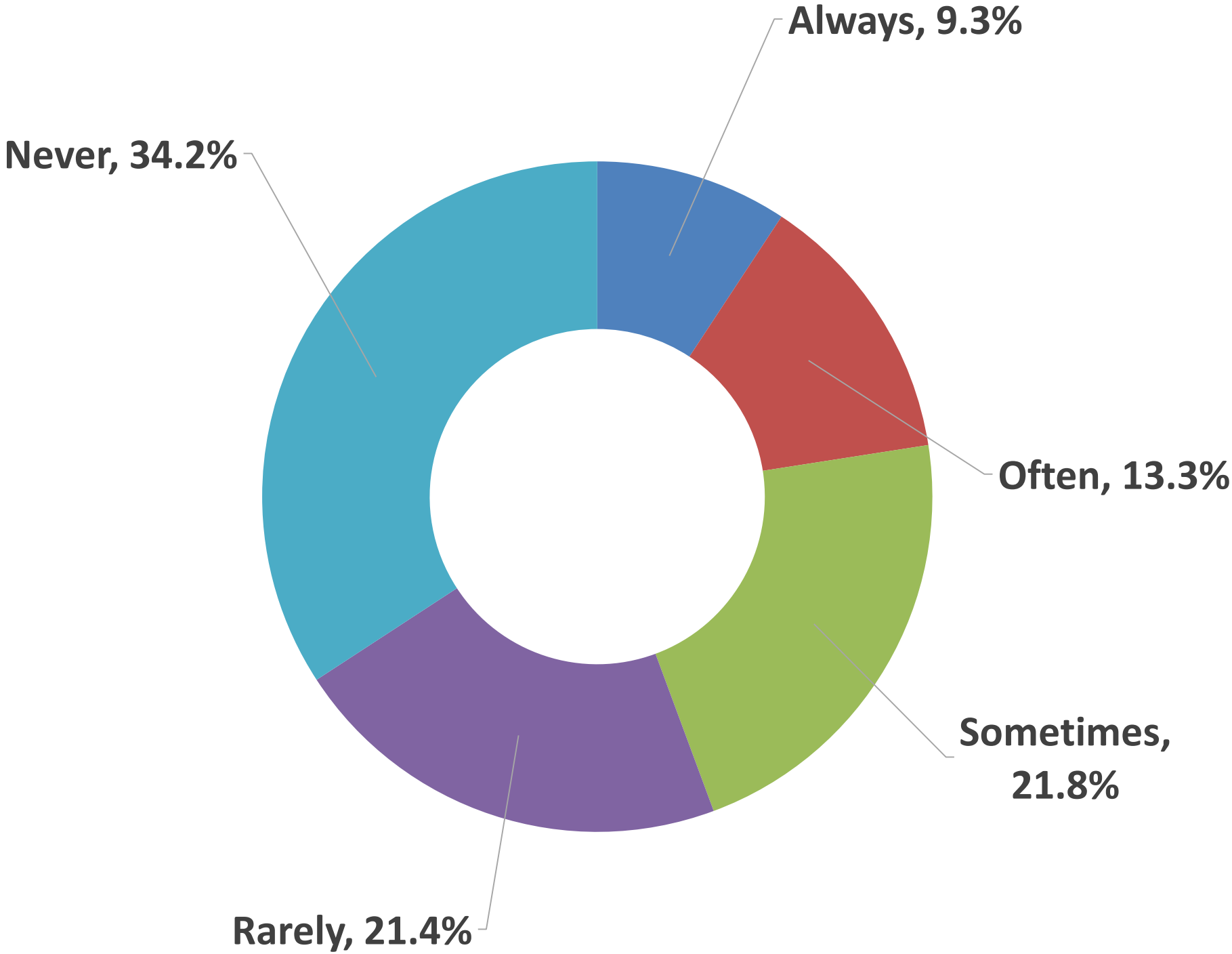
Question: In the normal course of your day, if you become bored or momentarily have some free time, how often will you feel the urge to pick up your mobile phone to entertain yourself?



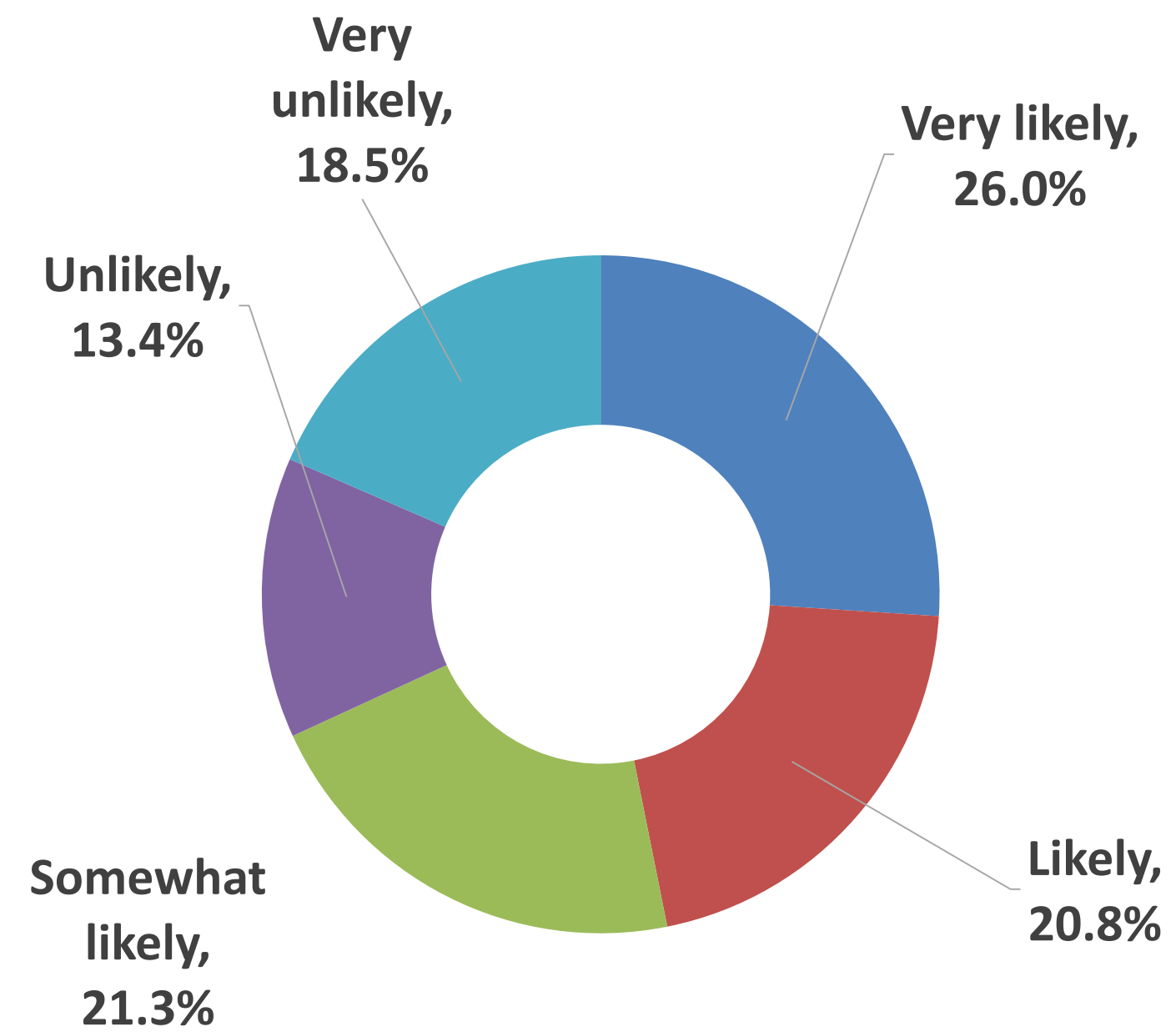
Question: You are in a social situation (e.g., a party, dinner with friends or family, a business meeting, etc.) and you receive a text or email message. How likely are you to immediately look at your mobile device to read it?



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?



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.



THANK YOU!



Destination
Analysts

DO YOUR RESEARCH

