

| Travel on mobile / SE


Exploring how people use their smartphones for travel activities

Q3 2016

About this study

Background: Mobile apps and sites are a vital channel for advertisers to engage with consumers. Google would like to be able to provide advertisers with a strong understanding of behaviors on mobile apps and sites so that they can design the most effective mobile strategy.

Objective: To help advertisers understand the Travel-related activities people use their smartphones for and how people find, use and stay engaged with apps in this category.

Methodology	15 minute online questionnaire covering travel category.	
Population	Smartphone users, 18-64, who used smartphone for travel in the past month Quotas set on enumeration data per vertical for age, gender, education, and Internet usage frequency. <small>To ensure vertical representation, a 'soft launch' based on the online population was conducted to determine the makeup of each vertical. After the soft launch was complete and each vertical's makeup was defined, quotas were set per vertical to match this universe. Weighting was applied on the back-end if needed.</small>	
Sample Size	N = 500 per vertical	
Market(s)	SE (also available for UK, US, CA, FR, NL, RU, TR, IL, KSA)	

| Contents



Smartphone Activities

General &
Vertical Specific



App Repertoire

Discovery & Acquisition
Usage



Preferences

Top apps
Features
Notifications



Abandonment & Re-engagement

Reasons to stop
and re-start using
apps

| Key findings

01

Over half of travel apps are used on a monthly basis

[slide 15]

For travel activities, mobile websites are used more than apps

[slide 9]

02

03

Security and range of features is key - with storage of preference preferred and trip status updates welcome [slide 26, 27]

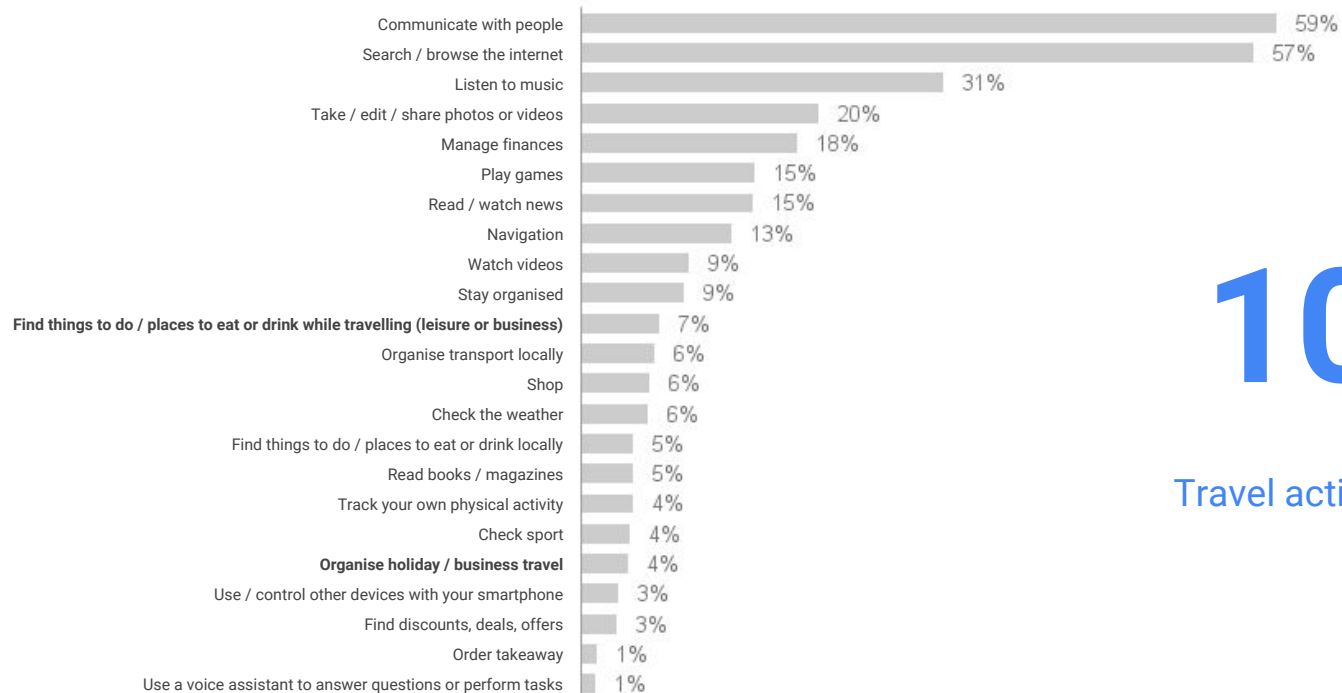
Exclusive offers, discounts, and redesign for easier use can lead some to re-engage [slide 30]

04

| Smartphone activities

| Must have smartphone activities

Amongst those who use mobile for travel activities



10%

Travel activities (net)*

| Frequency of travel activities on mobile

14%

At least **daily**

43%

At least **weekly**

Travel activities on smartphone

Past 30 day activities

		Weekly	Daily
Looked at things to do / tourist information while travelling	41%	14%	5%
Looked at things to do / tourist information before visiting	39%	11%	4%
Looked at accommodation options	38%	11%	3%
Checked flight times	32%	9%	2%
Looked at flight options	31%	11%	3%
Booked accommodation	26%	4%	1%
Used a digital ticket / boarding pass	26%	6%	2%
Looked for discounts or offers	25%	17%	6%
Watched videos about accommodation or the local area	20%	11%	4%
Checked into flight or accommodation	20%	4%	3%
Booked a flight	18%	3%	2%
Found address / contact information of a travel agency	16%	7%	3%
Wrote a review for a destination	15%	2%	1%
Looked at rental car options	11%	4%	1%
Used a loyalty programme	10%	7%	3%
Made a last minute booking	9%	3%	1%

Base: 500
 Q8. Which of the following activities have you done on your smartphone in the past 30 days? (Using either a mobile website or an app)
 Q9. How often do you do each of the following activities on your smartphone?

Usage of apps and sites for travel activities

Travel activities in past 30 days

45%

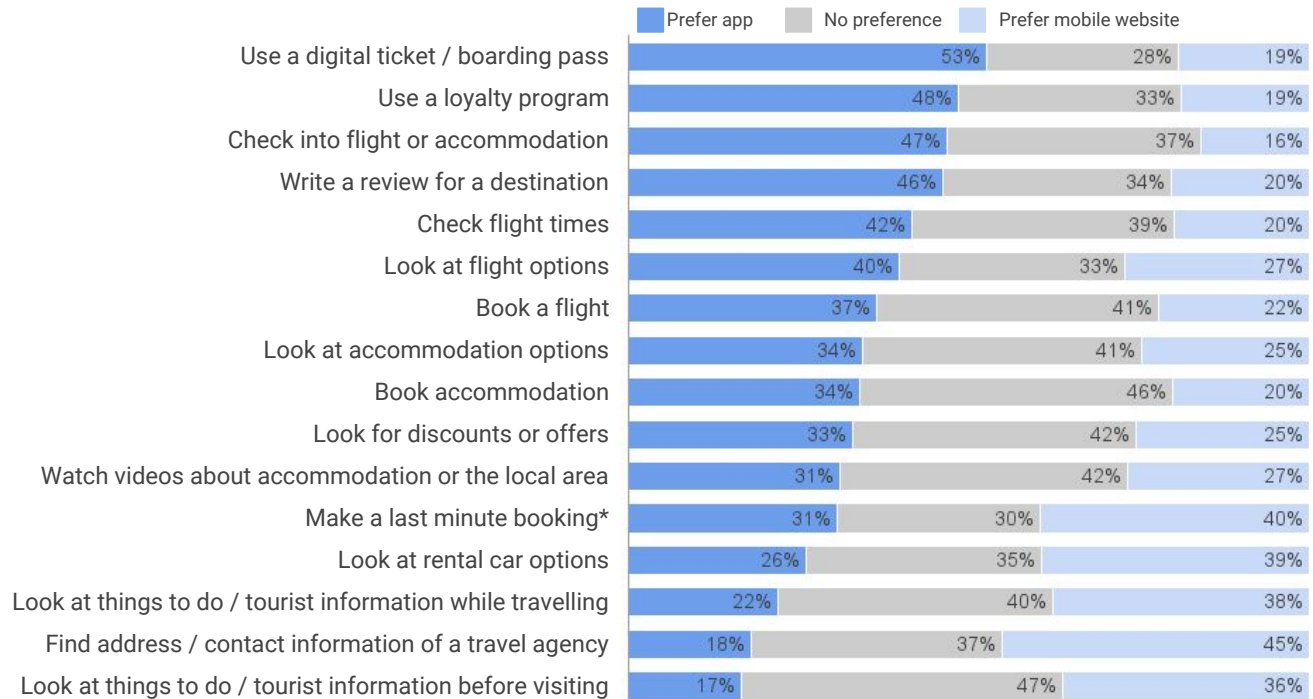
Used an app

75%

Used a mobile website

Preferences for top travel activities

Among those who have done activity in past 30 days



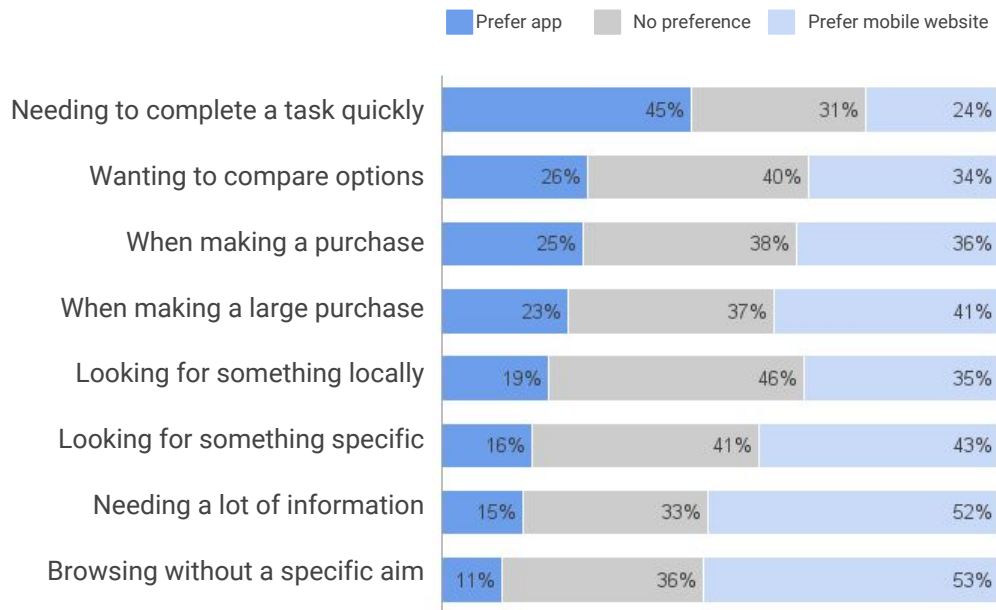
Base: 500

Q5. Have you used a mobile website or an app for each of these in the last 30 days? - Find things to do/places to eat while travelling; Organize holiday/business travel

Base: Have done the activity on smartphone in past 30 days (base above n=30 are shown) *Small base under n=50.

Q11. Which of these activities would you prefer to use an app for and which would you prefer to use a mobile website for?

Platform preferences for travel situations



- For most travel situations, mobile websites are preferred.
- Top situations when mobile websites are preferred include: browsing without aim, needing a lot of information, looking for something specific, and wanting to compare options.
- Apps are preferred when needing to complete a task quickly.

Top reasons for app vs mobile site preference

Top reasons app preferred

Simpler to navigate (60%) Quicker to load (46%)
Feels more secure (60%) Simpler to navigate (53%)
Simpler to navigate (75%) Quicker to load (41%)
Simpler to navigate (46%) Feels more secure (39%)

Situation

Needing to complete a task quickly
When making a large purchase
Looking for something locally
Browsing without a specific aim

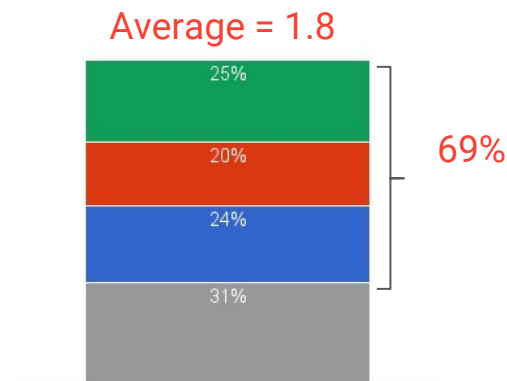
Top reasons mobile website preferred

Contains more information (41%) Doesn't take up storage on my device (41%)
Contains more information (46%) Feels more secure (46%)
Contains more information (59%) No need to provide personal information (41%)
Contains more information (58%) More likely to go to right page (39%)

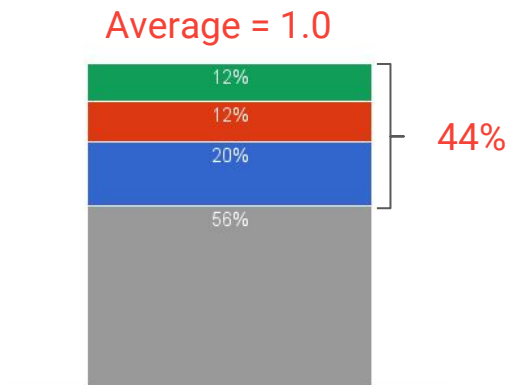
| App repertoire

| Number of travel apps installed

Currently installed



Installed past 3 months



None One app Two apps Three or more apps

Base: 500

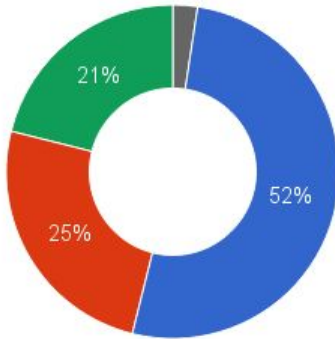
Q14. How many travel apps are installed on your smartphone (including any that were already installed when you bought it)?

Q18. How many travel apps have you installed on your smartphone in the past 3 months, including apps you've since uninstalled?

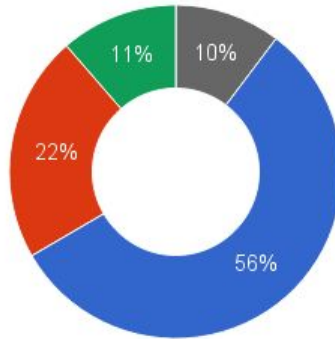
Lifecycle of new travel apps

Among those who installed a travel app in the past 3 months, an average of **2.2 apps were installed** in the past 3 months...

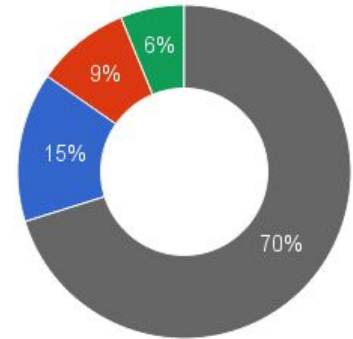
1.9 were ever opened
on average



1.5 were still in use
on average



0.5 were uninstalled
on average



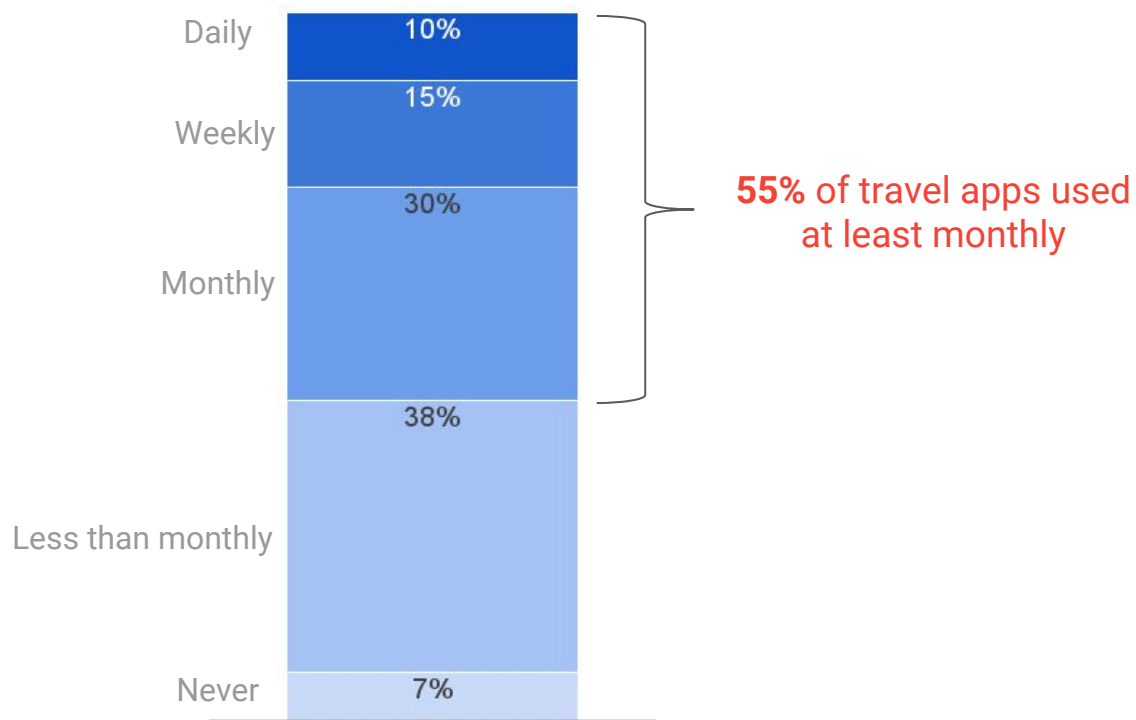
Base: Installed travel app(s) in the past 3 months (n=223)

Q19. How many of those [VERTICAL] apps you've installed in the past 3 months have you opened at least once since installing?

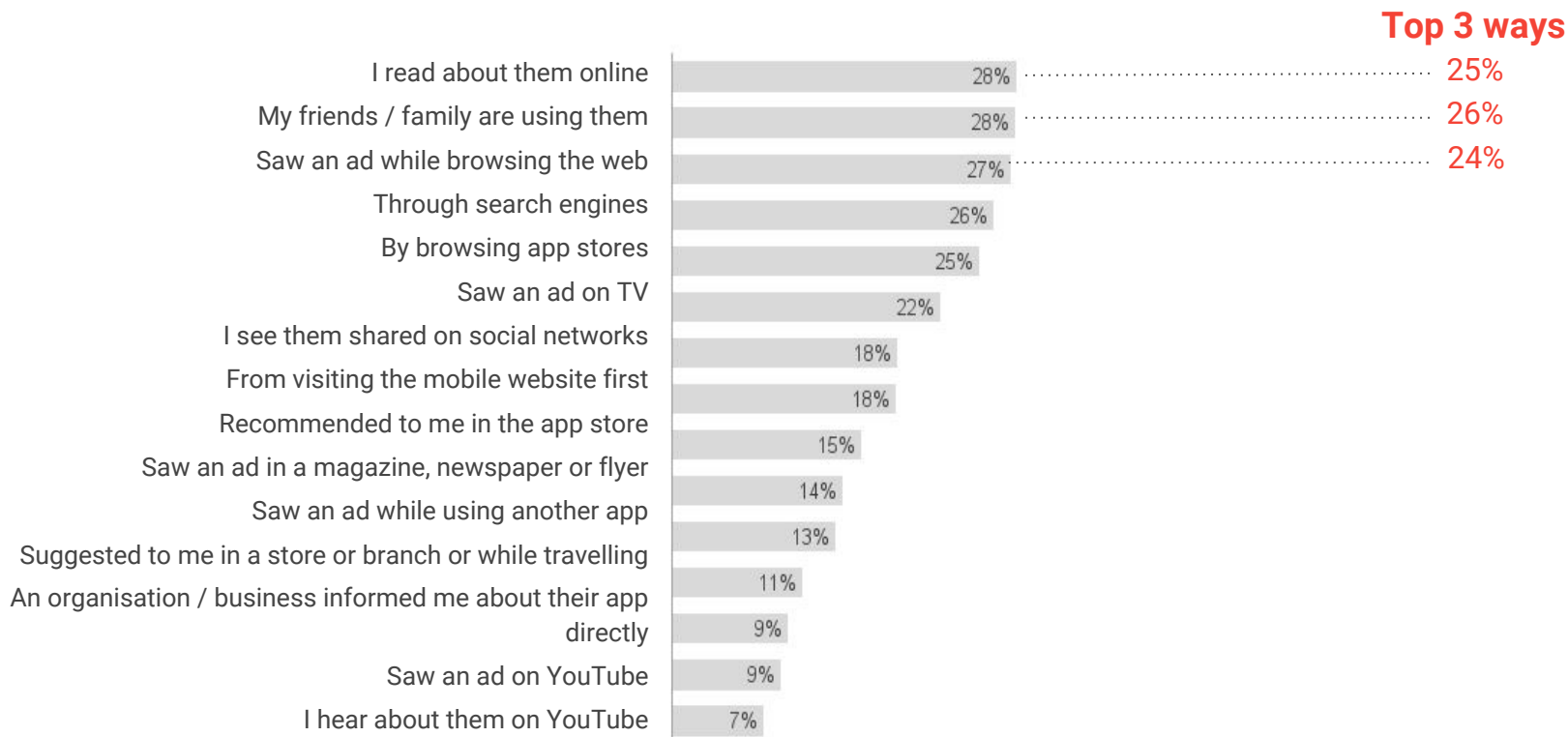
Q20. How many of those [VERTICAL] apps you've installed in the past 3 months are you still using now?

Q21. How many of those [VERTICAL] apps you've installed in the past 3 months have you since removed?

Average percentage of travel apps used



Ways to find out about travel apps



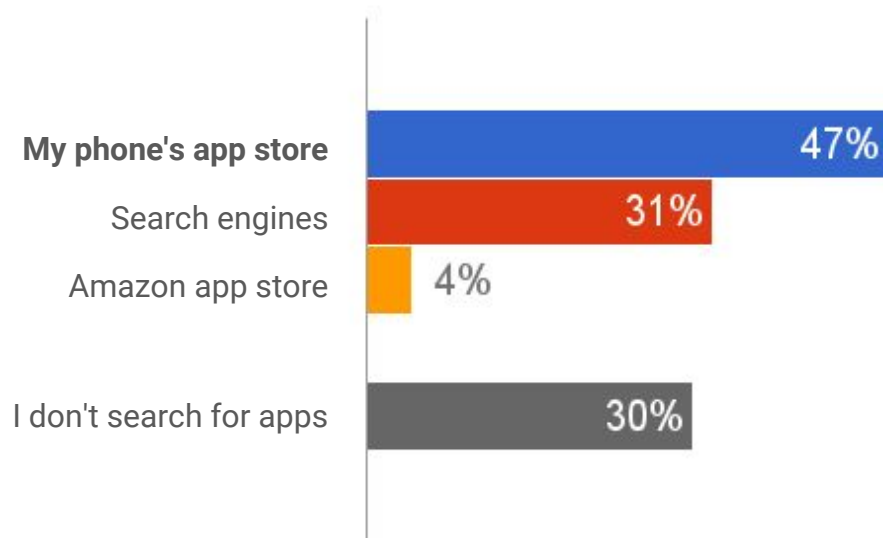
Base: 500

Q32. How do you typically find out about new travel smartphone apps?

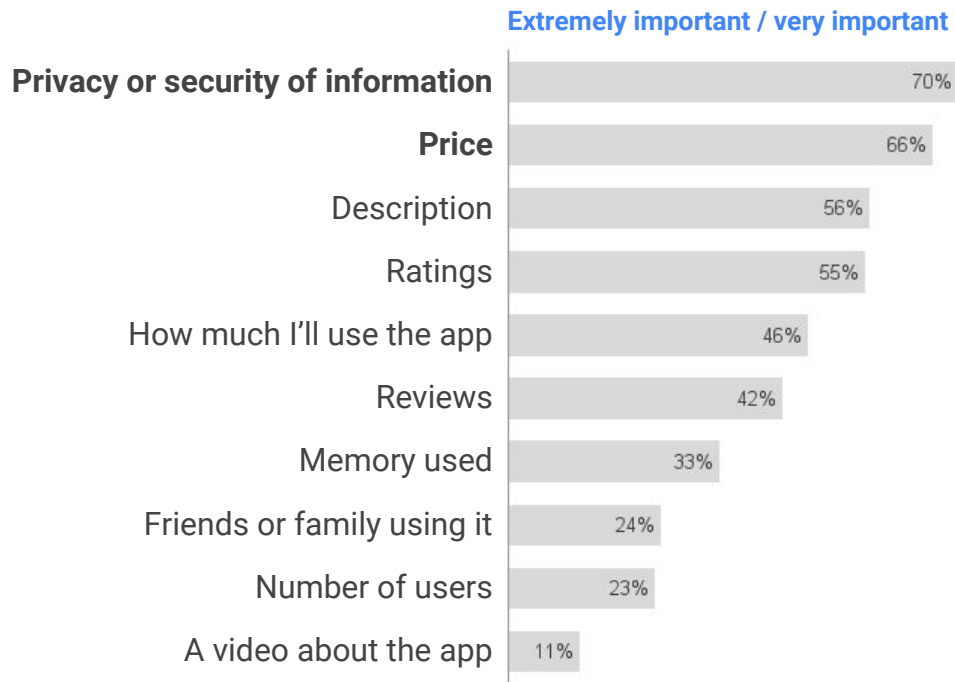
Q33. And have you found out about a travel app in any of these ways?

Q34. What are the top 3 ways you find out about the travel smartphone apps you use?

| Sources of finding travel apps



| App store download decision factors



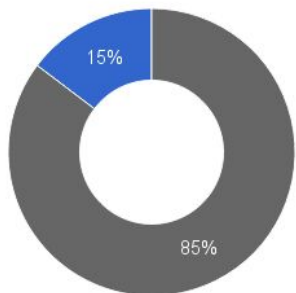
Base: Searches for apps on phone's app store (n=242)

Q38. When searching for travel apps in your smartphone's app store, how important are the following factors when making a decision about which app(s) to download?

Reasons for downloading travel apps



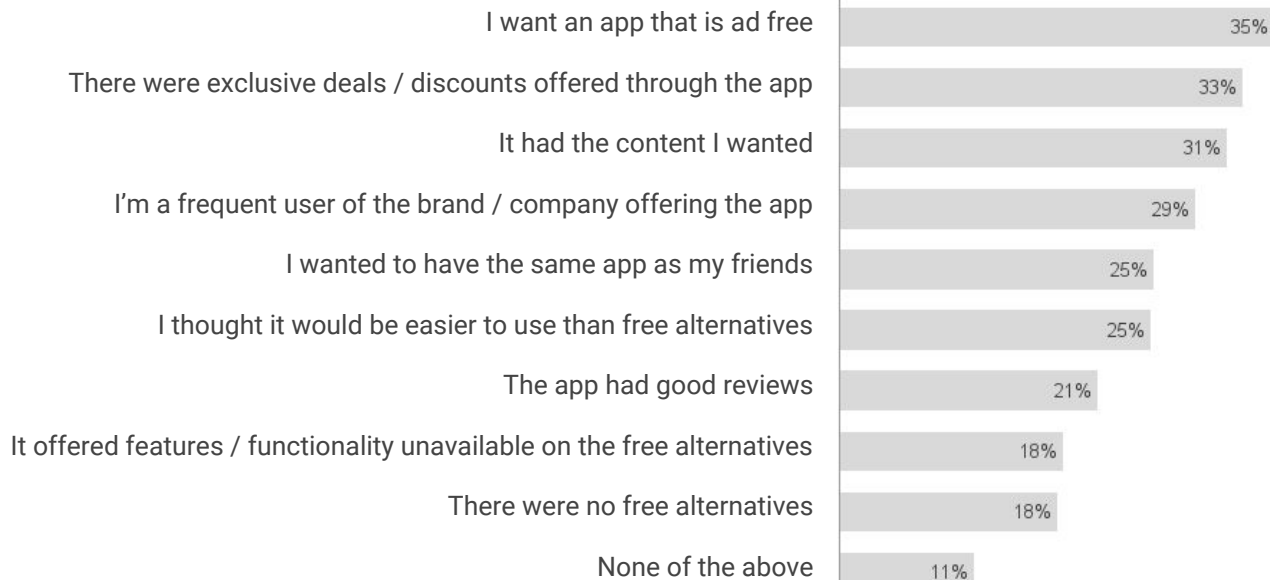
Reasons for paying for travel apps



Never paid to download travel app

Have paid to download travel app

Reasons for paying



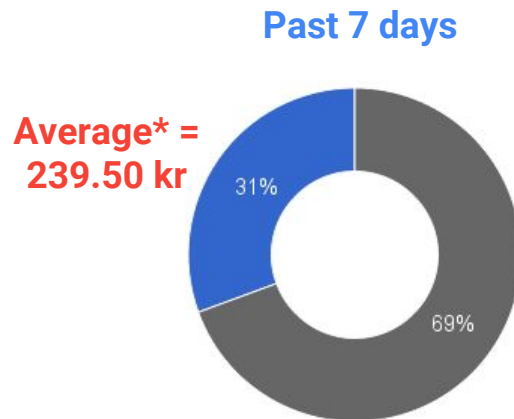
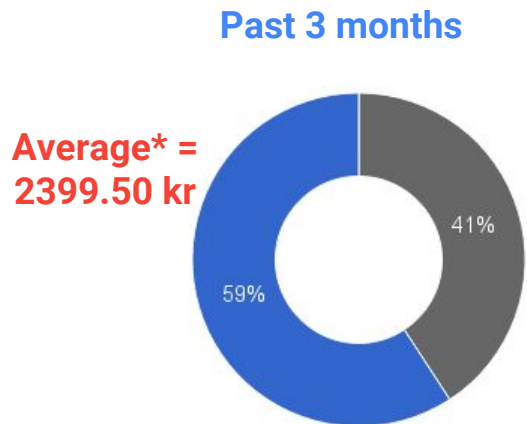
Base: 500 *Median

Q22. What is the most you have ever paid for a travel app? Please enter amount to the nearest whole number.

Base: Have paid to download a travel app (n=79)

Q23. Why have you chosen to pay for travel apps over other free alternatives?

Smartphone spending for products/services



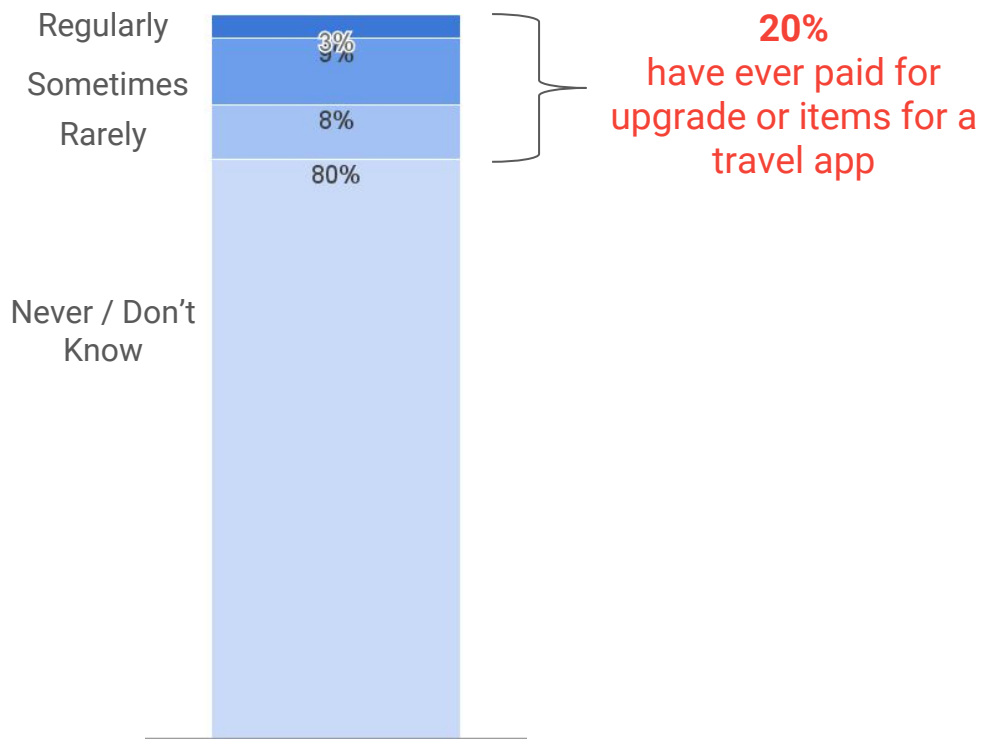
■ Have not spent money ■ Spent money

Base: 500 *Median

Q24b. Roughly how much have you spent on travel via your smartphone in the past in the past 3 months?

Q24b_1. Roughly how much have you spent on travel via your smartphone in the past in the past 7 days?

Frequency of paying for app upgrades/items

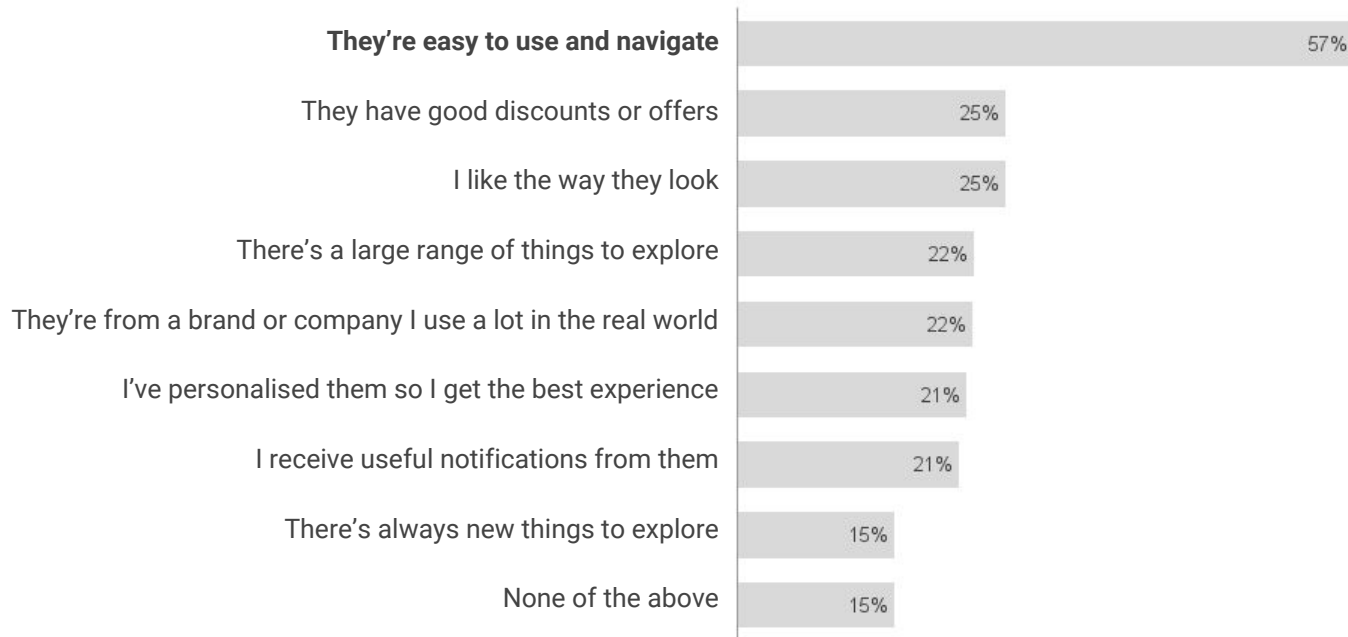


| Preferences

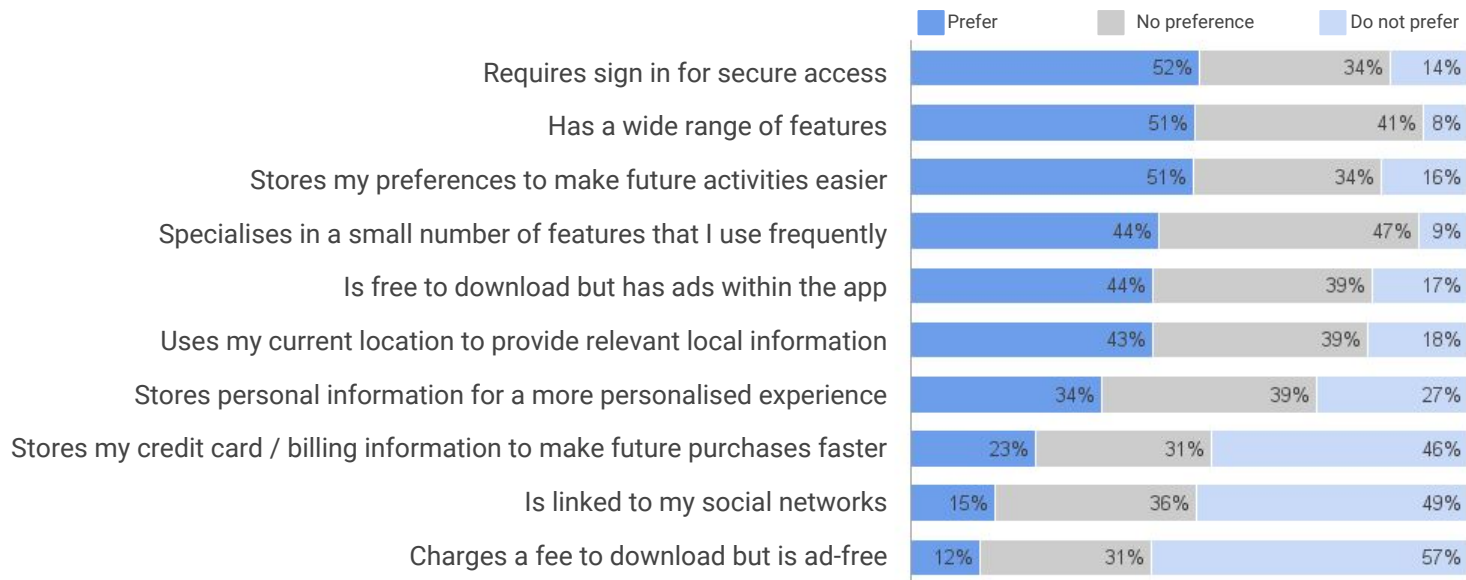
| Favourite travel apps are...



Characteristics of favourite apps



Preferred features for travel apps

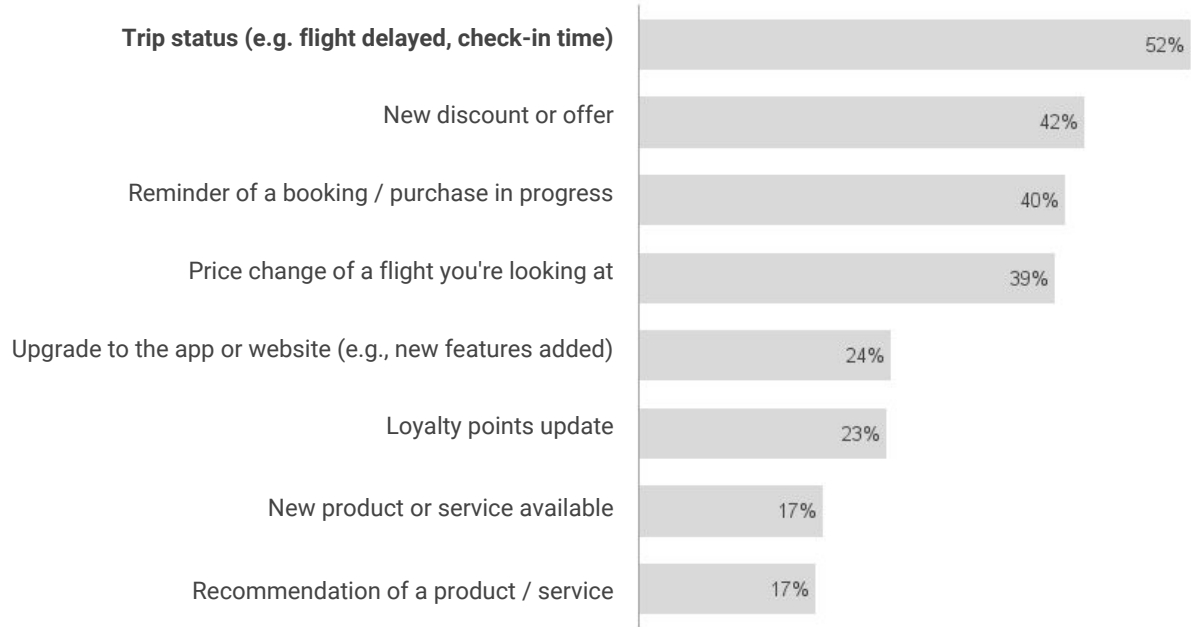


Useful notifications on phone

86%

find travel
notifications on
mobile **useful**

Most useful notifications



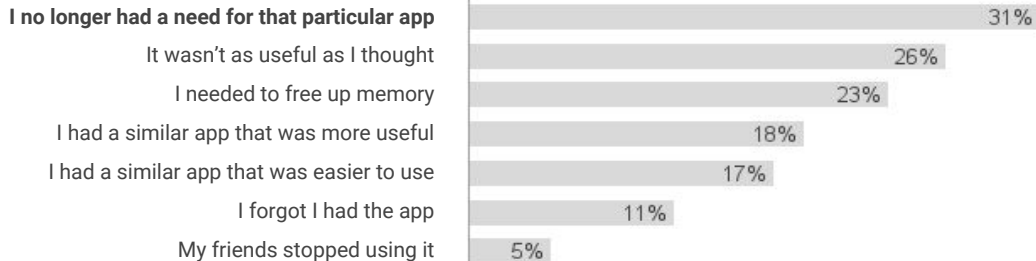
Base: 500

Q29. Apps or websites can give you notifications on your phone to tell you about a new update, message, or event, for example. What sort of travel notifications do you find useful?

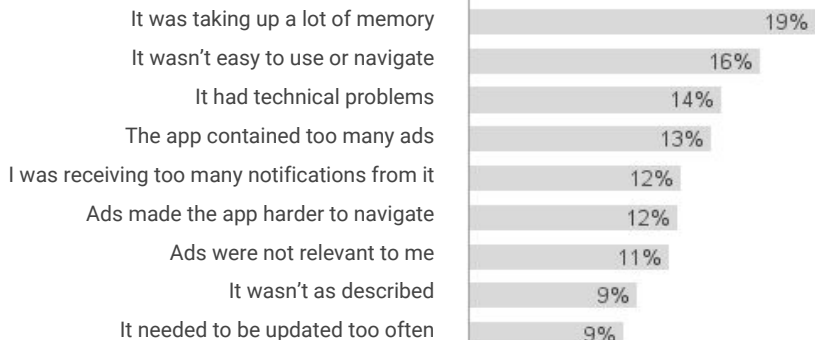
| Abandonment & re-engagement

Reasons for abandonment

Individual related



App related



Why no longer needed?

Was using for one-off trip
52%

Other apps covered travel needs
44%

No longer customer of company
25%

Base: 500

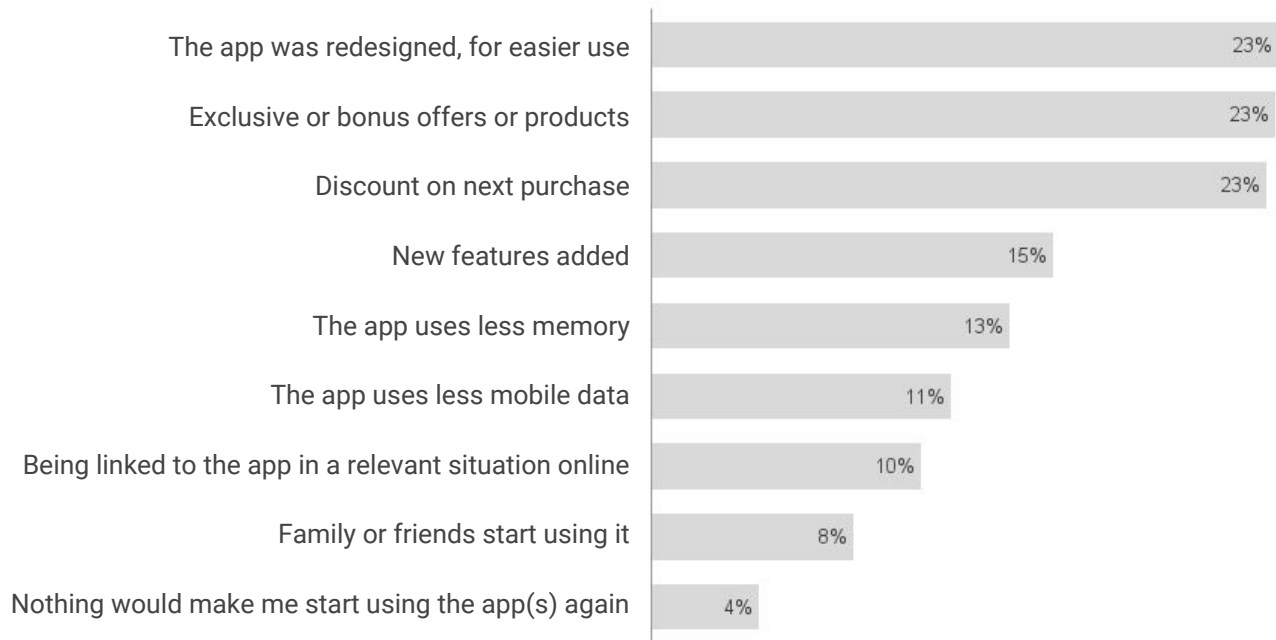
Q40. Have you stopped using travel apps on your smartphone for any of the reasons below? Select all that apply.

Q41. And have you stopped using travel apps on your smartphone for any of these reasons?

Base: No longer has need for a particular app (n=156)

Q42. You said you've stopped using travel apps because you no longer had a need for it / them. Why did you no longer need it / them?

Reasons to re-engage



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