Travel on mobile / KSA

Exploring how people use their smartphones for travel activities Q3 2016

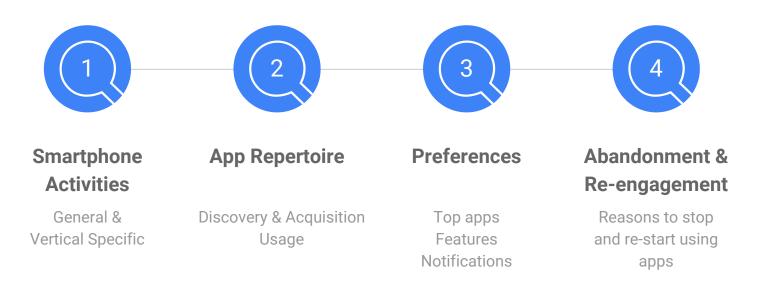


About this study

- **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. 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.
Sample Size	N = 300 per vertical
Market(s)	KSA (also available for UK, US, CA, NL, SE, FR, TR, RU, IL)

Contents



Key findings

01

Nearly half of travel apps are used on a weekly basis [slide 15]

For travel activities, apps are preferred over mobile sites [slide 9]

02

03

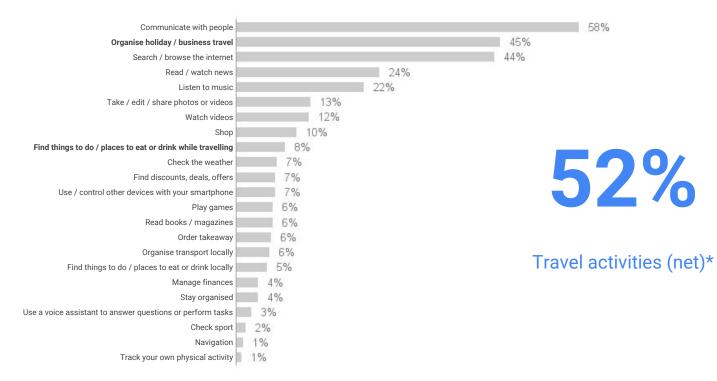
Discounts or offers are preferred features of favourite apps and welcomed as notifications [slide 25, 27] Lack of usefulness can lead some to abandon apps, while new features is the top reason for re-engaging [slide 29, 30]



Smartphone activities

Must have smartphone activities

Amongst those who use mobile for travel activities



Base: 300 *Travel activities (net) = Find things to do/ places to eat or drink while travelling AND/OR Organise holiday/ business travel Q3. If you could only use your smartphone to do three of these activities from now on, which would you choose?



Frequency of travel activities on mobile





At least daily

At least weekly



Travel activities on smartphone

Past 30 day activities		Weekly	Daily
Looked for discounts or offers	41%	14%	8%
Checked flight times	29%	14%	10%
Booked a flight	26%	11%	8%
Looked at flight options	26%	15%	10%
Booked accommodation	23%	15%	11%
Looked at things to do / tourist information while travelling	23%	10%	7%
Looked at accommodation options	23%	15%	12%
Checked into flight or accommodation	17%	11%	9%
Watched videos about accommodation or the local area	16%	9%	6%
Looked at things to do / tourist information before visiting	15%	7%	3%
Made a last minute booking	14%	12%	10%
Looked at rental car options	14%	10%	9%
Found address / contact information of a travel agency	12%	8%	7%
Wrote a review for a destination	11%	8%	6%
Used a digital ticket / boarding pass	10%	8%	7%
Used a loyalty programme	9%	7%	6%

Base: 300

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

Preferences for top travel activities

Among those who have done activity in past 30 days

Google

		Prefer app No preference	Prefer mobile web	osite
30 days	Make a last minute booking*		86%	9% 5%
	Write a review for a destination*		78% 12%	9%
710/	Look at accommodation options		74% 13%	13%
71%	Book accommodation		73% 13%	14%
	Look at rental car options*		72% 16%	12%
Used an app	Book a flight		70% 10%	20%
	Look at flight options		69% 13%	18%
	Look for discounts or offers		69% 9%	22%
	Check flight times		67% 10%	23%
	Check into flight or accommodation		67% 20%	14%
50%	Find address / contact information of a travel agency*		65% 11%	24%
	Look at things to do / tourist information while travelling		<mark>65%</mark> 15%	21%
Used a mobile website	Watch videos about accommodation or the local area*	60%	6 21%	19%
	Look at things to do / tourist information before visiting*	57%	11%	32%

Base: 159

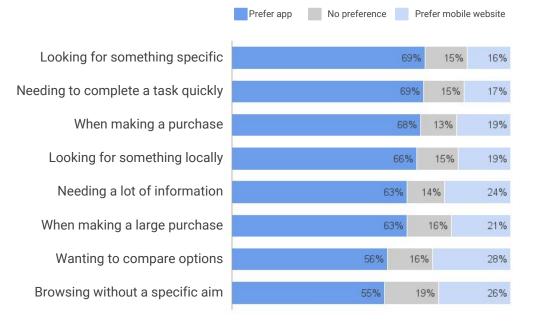
Q5. Have you used a mobile website or an app for each of these in the last 30 days? - Find things to do/places to eat while travelling; Organize holiday/business travel

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

Travel activities in past

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

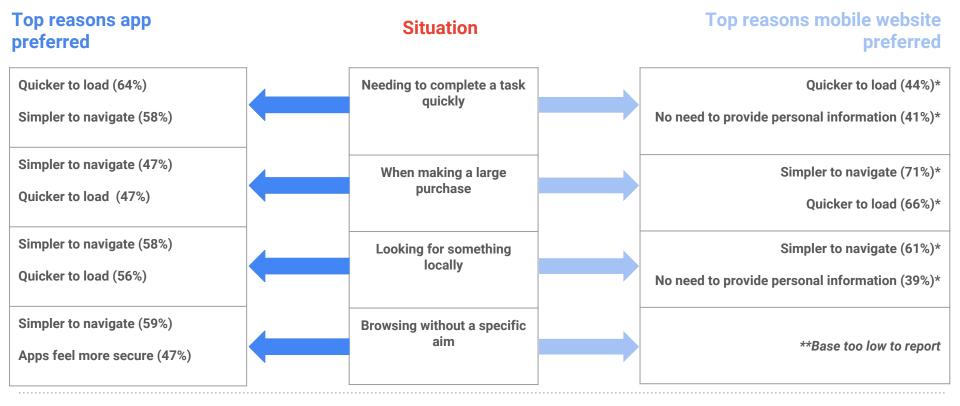
Platform preferences for travel situations



- Apps are preferred over mobile sites for all travel situations.
- Top reasons apps are preferred for situations include being quick to load and simple to navigate (slide 11).



Top reasons for app vs mobile site preference



Base: Prefers app/mobile website for activity (base above n=30 are shown) *Small base under n=50. Q13a/b. Why would you prefer to use an app when...?/ Why would you prefer to use a mobile site when...?

Google

App repertoire

Number of travel apps installed

Currently installed Installed past 3 months Average = 0.8Average = 1.1 3% 44% 52% 58% 71% One app Two apps Three or more apps None

Base: 300

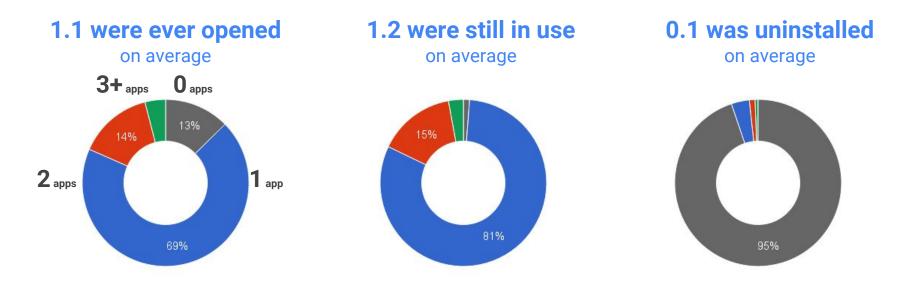
Q14. How many travel apps are installed on your smartphone (including any that were already installed when you bought it)?

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

Google

Lifecycle of new travel apps

Among those who installed a travel app in the past 3 months, an average of **1.4 apps were installed** in the past 3 months...



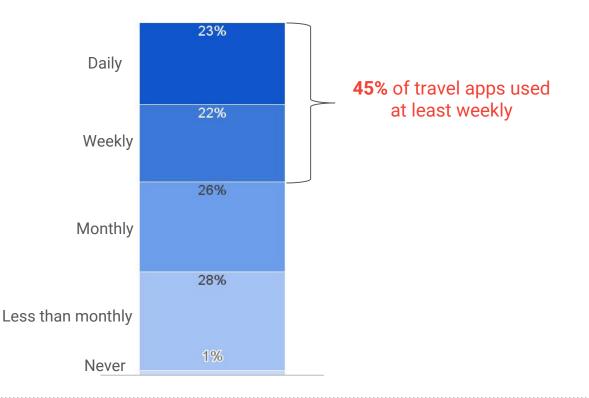
Base: Installed travel app(s) in the past 3 months (n=174)

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



Base: Has travel apps installed on smartphone (n=213)

Q15. Roughly what percentage of the travel apps are installed on your smartphone do you use...?



Ways to find out about travel apps

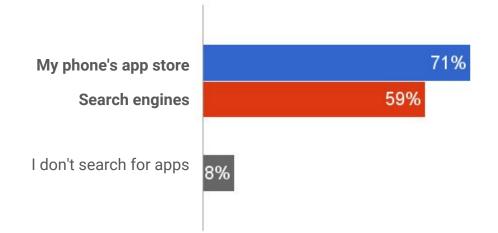
Recommended to me in the app store42%40%My friends / family are using them39%36%Through search engines34%30%By browsing app stores34%30%I read about them online33%36%Saw an ad while browsing the web30%30%Suggested to me in a store or branch or while travelling30%30%Saw an ad on TV28%28%
Through search engines34%By browsing app stores34%I read about them online33%Saw an ad while browsing the web30%Suggested to me in a store or branch or while travelling30%Saw an ad on TV28%
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Saw an ad while browsing the web 30% Suggested to me in a store or branch or while travelling 30% Saw an ad on TV 28%
Suggested to me in a store or branch or while travelling 30% Saw an ad on TV 28%
Saw an ad on TV 28%
I see them shared on social networks 28%
Saw an ad while using another app 27%
I hear about them on YouTube 26%
Saw an ad on YouTube 25%
anisation / business informed me about their app directly
From visiting the mobile website first 20%
Saw an ad in a magazine, newspaper or flyer

An organisation / business in Fro Saw an ac 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?

Base: 300

Sources of finding travel apps





App store download decision factors

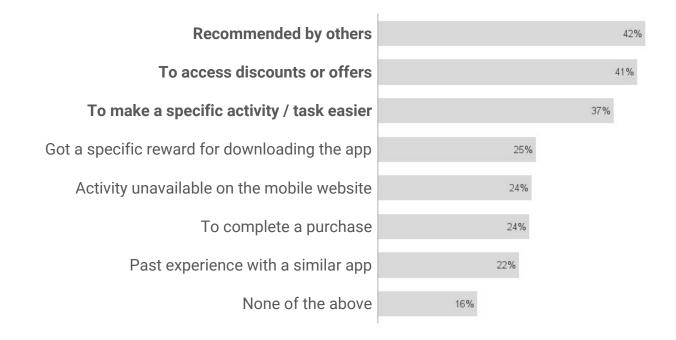
1

Extremely important / very important

Privacy or security of information	89%
Ratings	86%
Price	85%
How much I'll use the app	84%
Reviews	81%
Memory used	81%
Description	80%
Friends or family using it	78%
A video about the app	78%
Number of users	77%

Base: Searches for apps on phone's app store (n=212) 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

Reasons for paying

		The app had good reviews		44%
21%		I wanted to have the same app as my friends	36%	3
		There were exclusive deals / discounts offered through the app	35%	2
		It offered features / functionality unavailable on the free alternatives	34%	
		I want an app that is ad free	32%	
		It had the content I wanted	32%	
	paid to	I thought it would be easier to use than free alternatives	31%	
downloaddowntravel appapp	download travel app	I'm a frequent user of the brand / company offering the app	27%	
		There were no free alternatives	18%	

Base: 300 *Median

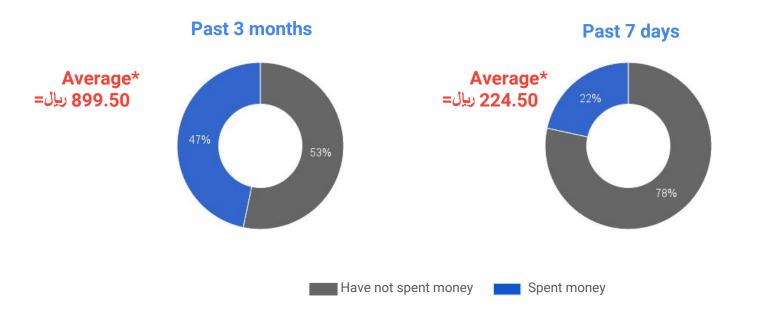
Q22. What is the most you have ever paid for a travel app? Please enter amount to the nearest whole number.

Base: Have paid to download a travel app (n=62)

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



Smartphone spending for products/services

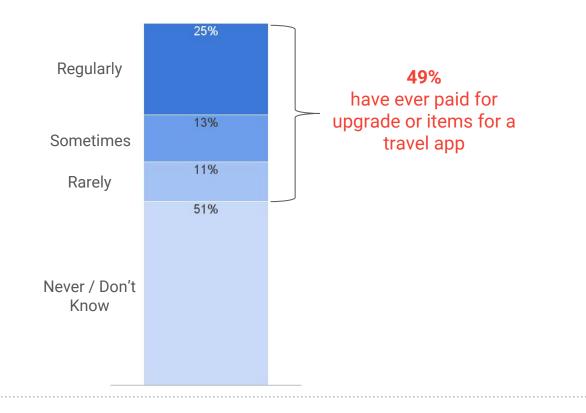


Base: 300 *Median

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...

Booking.com Wego Google Yamsafer Almsafer



Characteristics of favourite apps

They have good discounts or offers			40%
They're easy to use and navigate		37%	
I like the way they look		30%	
They're from a brand or company I use a lot in the real world		29%	
I receive useful notifications from them	28	3%	
There's a large range of things to explore	25%		
I've personalised them so I get the best experience	25%		
There's always new things to explore	25%		
None of the above	14%		

Preferred features for travel apps

	Prefer No preference	Do not prefer	
Stores my preferences to make future activities easier	799	6 18%	2%
Uses my current location to provide relevant local information	79%	6 17%	4%
Is free to download but has ads within the app	78%	18%	4%
Has a wide range of features	78%	19%	3%
Stores personal information for a more personalised experience	77%	20%	3%
Requires sign in for secure access	76%	19%	5%
Stores my credit card / billing information to make future purchases faster	74%	19% 7%	
Is linked to my social networks	74%	22%	4%
Specialises in a small number of features that I use frequently	69%	22% 10%	
Charges a fee to download but is ad-free	66%	19% 15%	



Useful notifications on phone

Most useful notifications

	New discount or offer	46%
	Recommendation of a product / service	34%
85%	New product or service available	34%
find travel	Trip status	29%
notifications on mobile useful	Reminder of a booking / purchase in progress	28%
	Upgrade to the app or website	27%
	Price change of a flight you're looking at	24%
	Loyalty points update	21%



Abandonment & re-engagement

Reasons for abandonment

It wasn't as useful as I thought						25%	Why no longer needed
I no longer had a need for that particular app						25%	
I had a similar app that was more useful					23%		Was using for
My friends stopped using it				22%			one-off trip
I needed to free up memory				22%			66%
I forgot I had the app			21%				
I had a similar app that was easier to use		20%					No longer customer of
							company
It was taking up a lot of memory					23%		64%
It had technical problems		19%					
It wasn't easy to use or navigate		19%					Other apps covered
I was receiving too many notifications from it		19%					travel needs
It needed to be updated too often	18%						
It wasn't as described	18%						58%
Ads were not relevant to me	17%						
Ads made the app harder to navigate	17%						
The app contained too many ads	16%						

Individual related

Base: 300

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

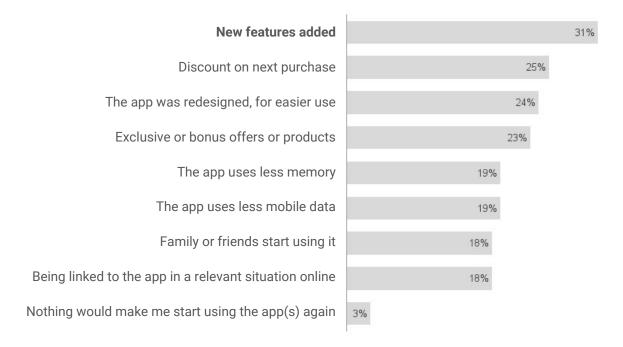
Q41. And have you stopped using travel apps on your smartphone for any of these reasons?

Base: No longer has need for a particular app (n=74)

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?

2

Reasons to re-engage



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