

| Travel on mobile / RU

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 = 300 per vertical	
Market(s)	RU (also available for UK, US, CA, NL, SE, FR, 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

The majority 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

Range of features is key - with storage of preferences and a wide range of features preferred [slide 26]

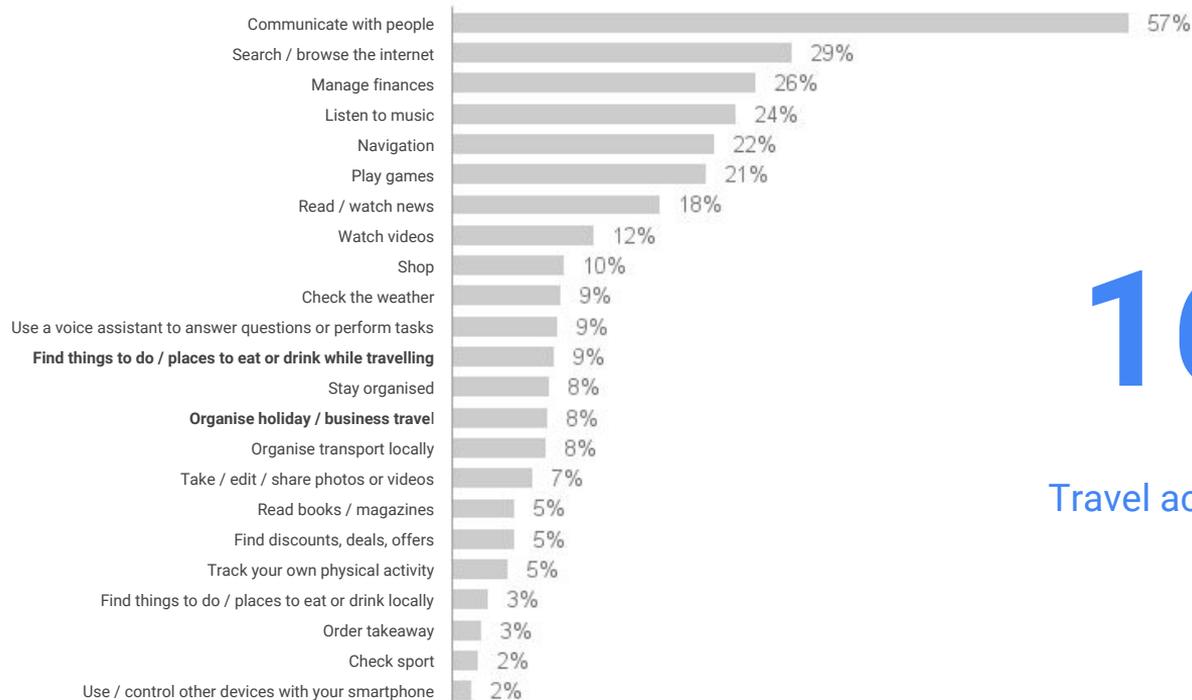
Addition of new features can lead some to re-engage [slide 30]

04

| Smartphone activities

| Must have smartphone activities

Amongst those who use mobile for travel activities



16%

Travel activities (net)*

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

41%

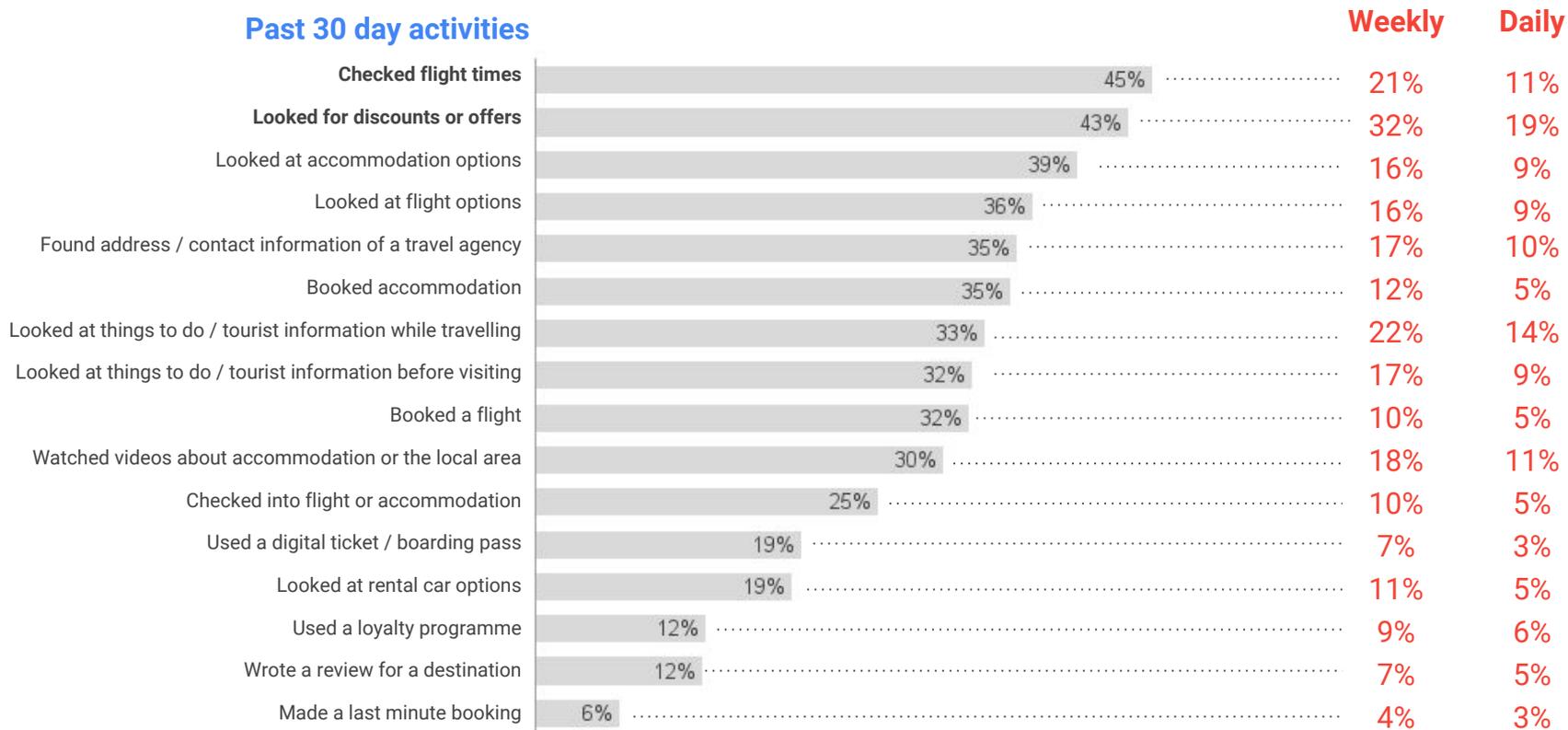
At least **daily**

77%

At least **weekly**

Travel activities on smartphone

Past 30 day activities



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

Travel activities in past 30 days

44%

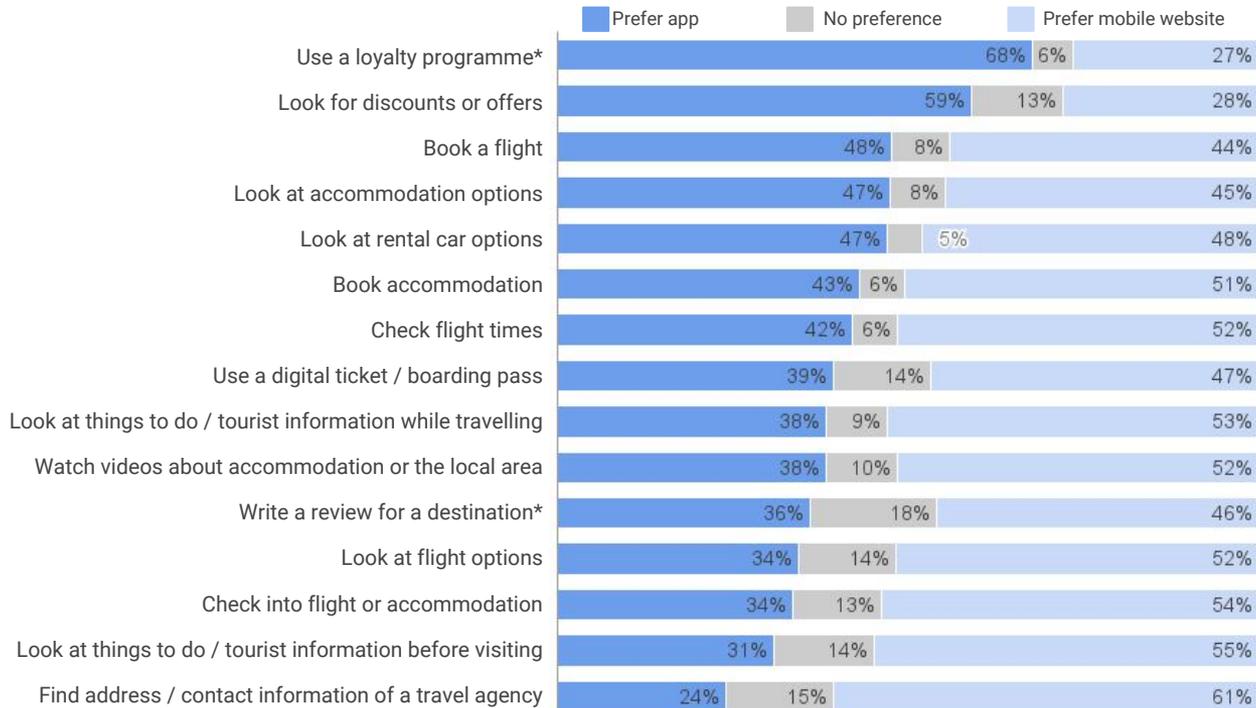
Used an app

70%

Used a mobile website

Preferences for top travel activities

Among those who have done activity in past 30 days



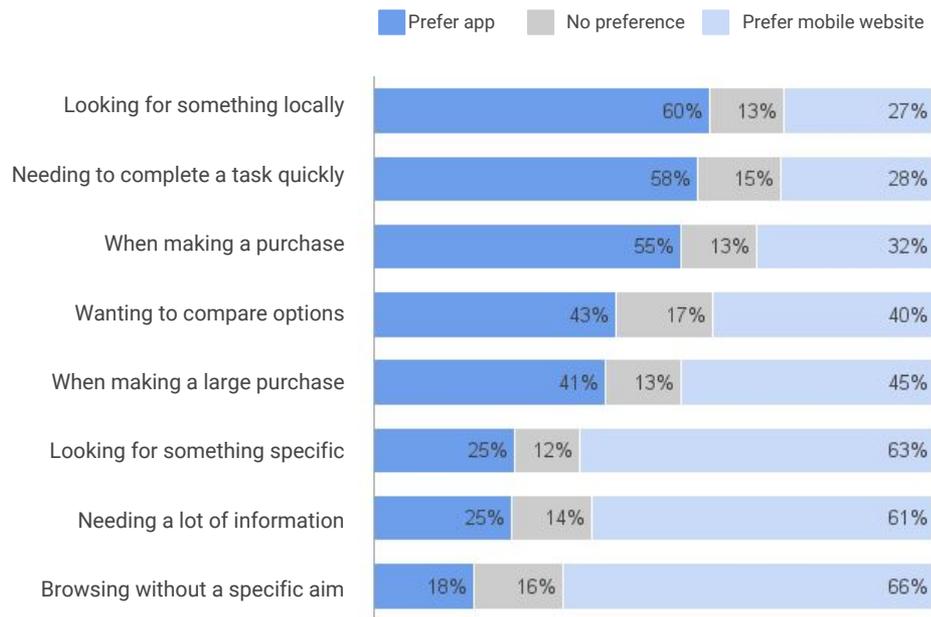
Base: 300

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



- Most have a preference between an app and a mobile website for travel situations.
- Apps are preferred for local, quick tasks and purchases.
- Mobile websites are preferred when needing more information, including browsing with or without a specific aim.
- Platform preference for large purchases and comparing options are split.

Top reasons for app vs mobile site preference

Top reasons app preferred

Quicker to load (62%)
Simpler to navigate (62%)
Simpler to navigate (66%)*
Contain discounts or offers (60%)*
Simpler to navigate (74%)
Quicker to load (60%)
Quicker to load (53%)*
Simpler to navigate (44%)*

Situation

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

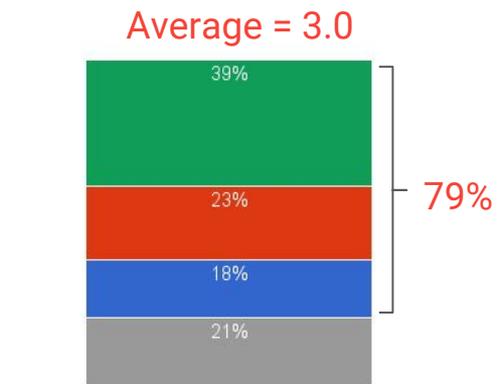
Top reasons mobile website preferred

Contains more info (44%)
More likely to go to right page (41%)
Don't take up storage on my device (40%)
Contains more info (54%)
Feel more secure (49%)
No need to provide personal info (50%)*
Don't take up storage on my device(48%)*
Contains more info (48%)*
Contains more info (55%)
No need to provide personal info (52%)

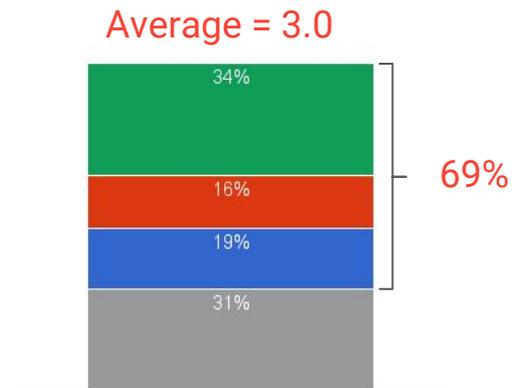
| App repertoire

| Number of travel apps installed

Currently installed



Installed past 3 months



None One app Two apps Three or more apps

Base: 300

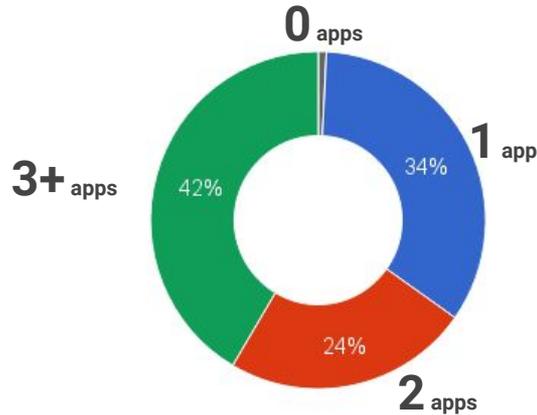
Q14. How many travel apps are installed on your smartphone (including any that were already installed when you bought it)?

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

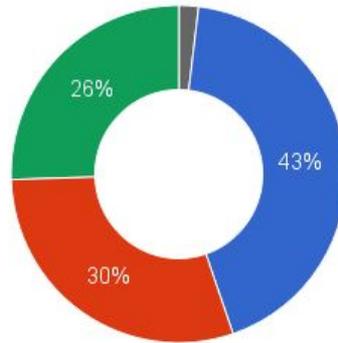
Lifecycle of new travel apps

Among those who installed a travel app in the past 3 months, an average of **4.3 apps were installed** in the past 3 months...

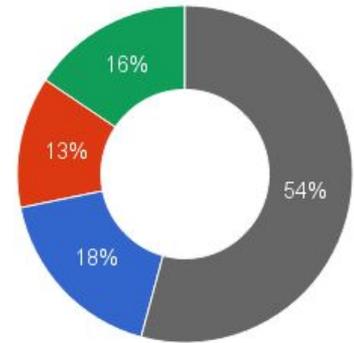
3.5 were ever opened
on average



2.4 were still in use
on average



1.6 were uninstalled
on average



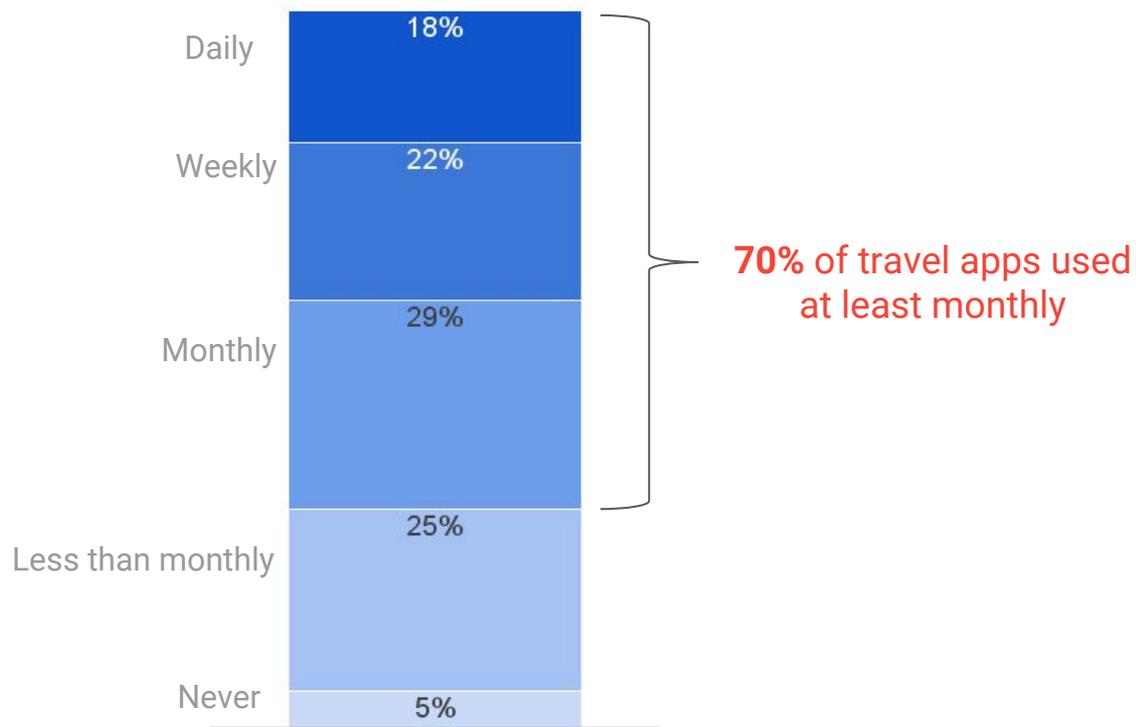
Base: Installed travel app(s) in the past 3 months (n=210)

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

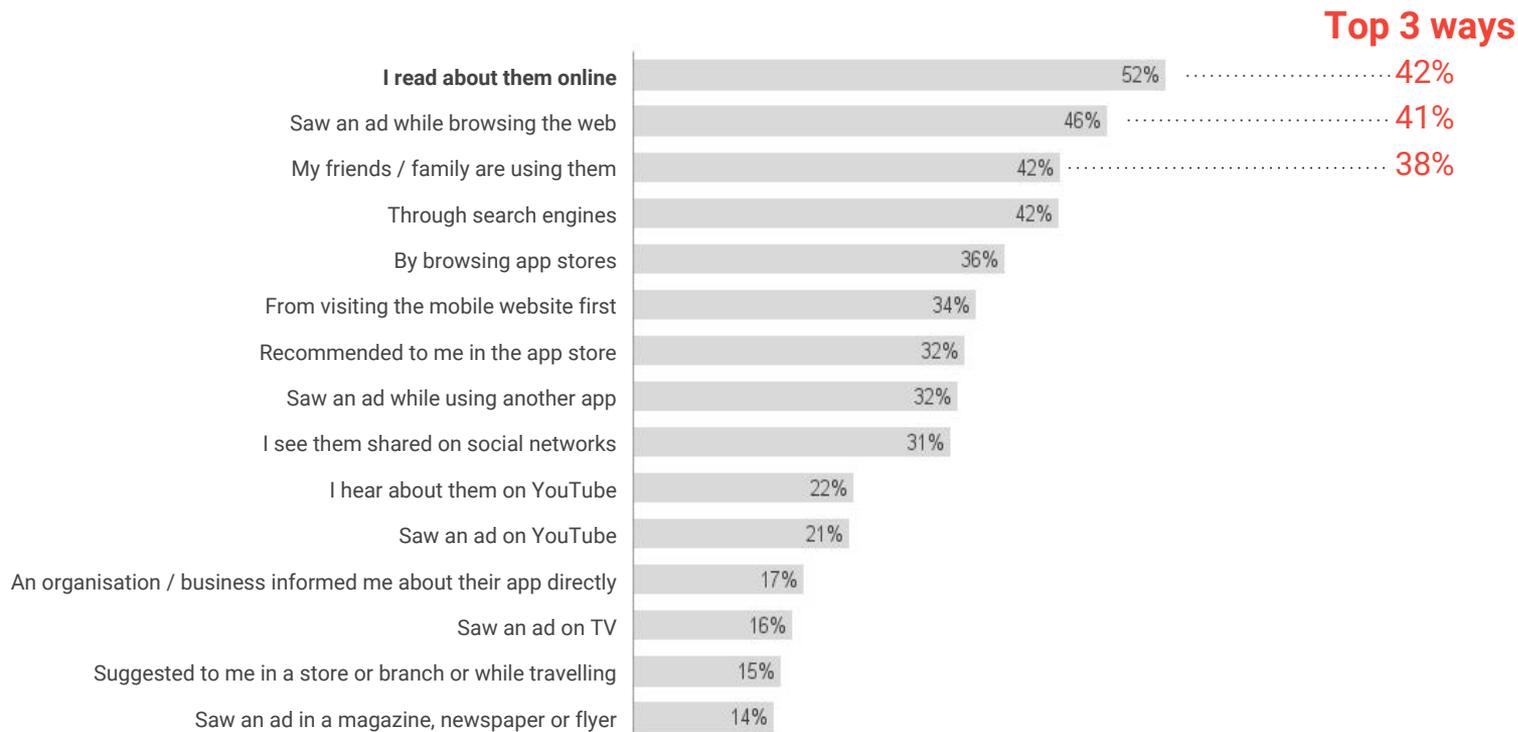
Q20. How many of those travel apps you've installed in the past 3 months are you still using now?

Q21. How many of those travel 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



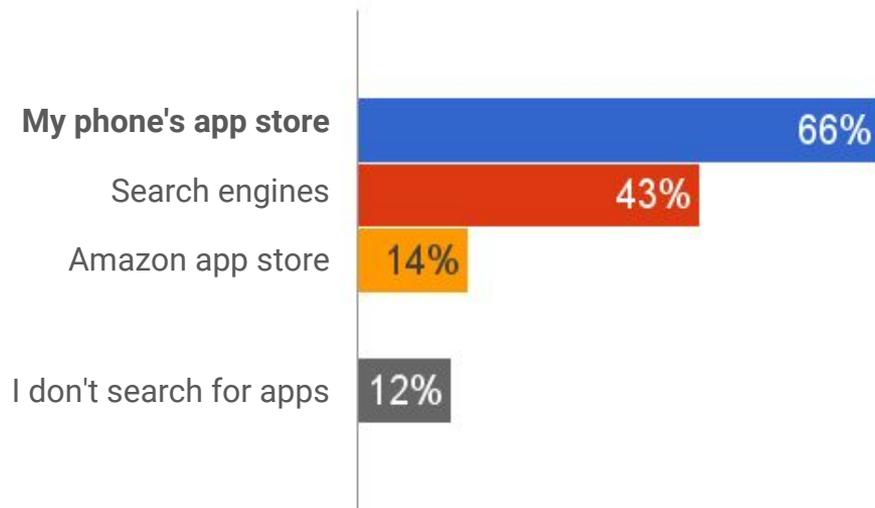
Base: 300

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

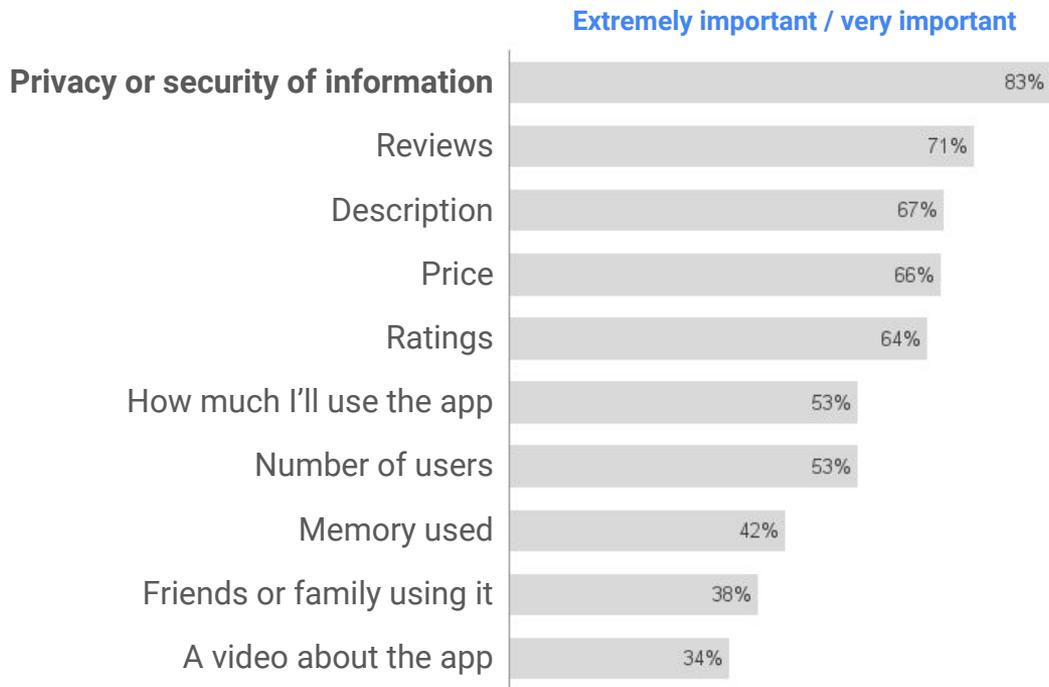
Q33. And have you found out about a travel app in any of these ways?

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

| Sources of finding travel apps



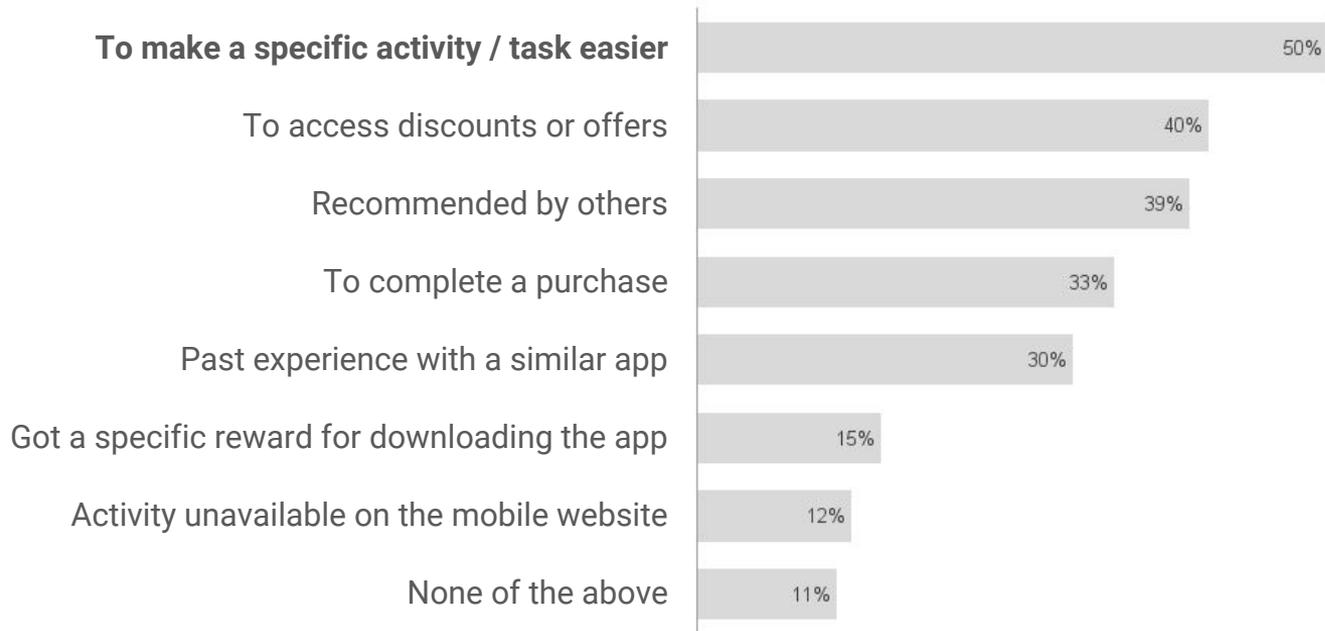
| App store download decision factors



Base: Searches for apps on phone's app store (n=200)

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?

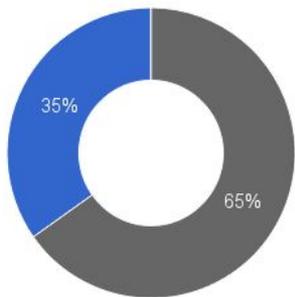
Reasons for downloading travel apps



Base: 300

Q35. For which of these reasons have you downloaded a travel app in the past? Select all that apply.

Reasons for paying for travel apps



Never paid to download travel app

Have paid to download travel app

Reasons for paying

It offered features / functionality unavailable on the free alternatives

56%

I want an app that is ad free

50%

It had the content I wanted

48%

There were exclusive deals / discounts offered through the app

44%

The app had good reviews

44%

I thought it would be easier to use than free alternatives

28%

I wanted to have the same app as my friends

25%

There were no free alternatives

21%

I'm a frequent user of the brand / company offering the app

19%

None of the above

2%

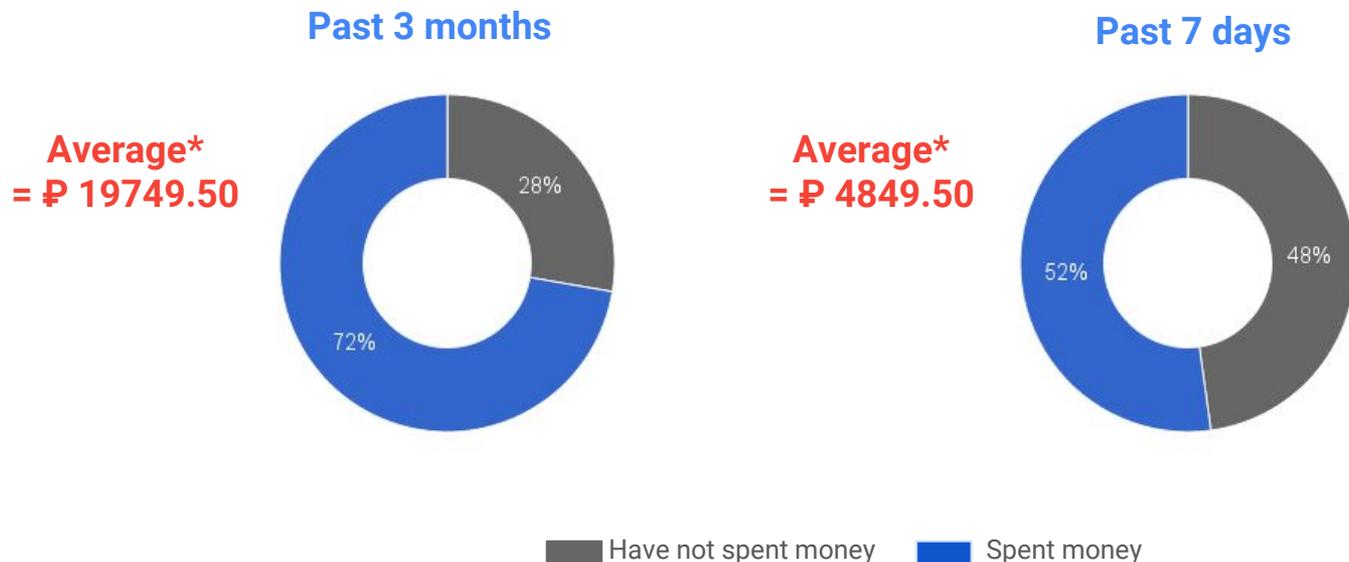
Base: 300 *Median

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=107)

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

Smartphone spending for products/services

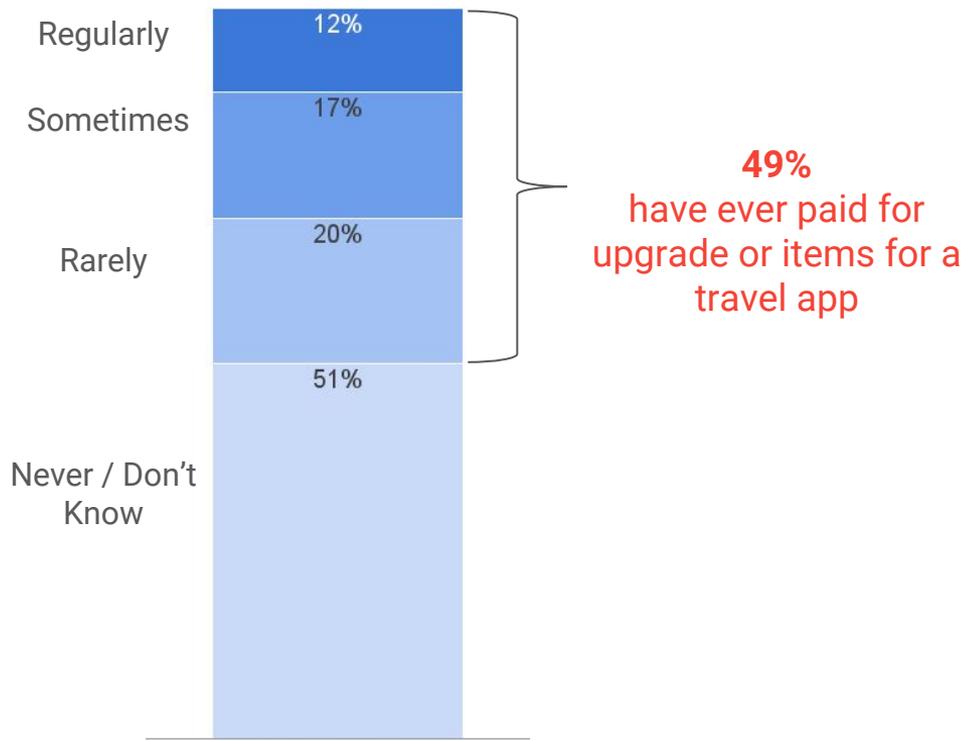


Base: 300 *Median

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...



Characteristics of favourite apps



Preferred features for travel apps

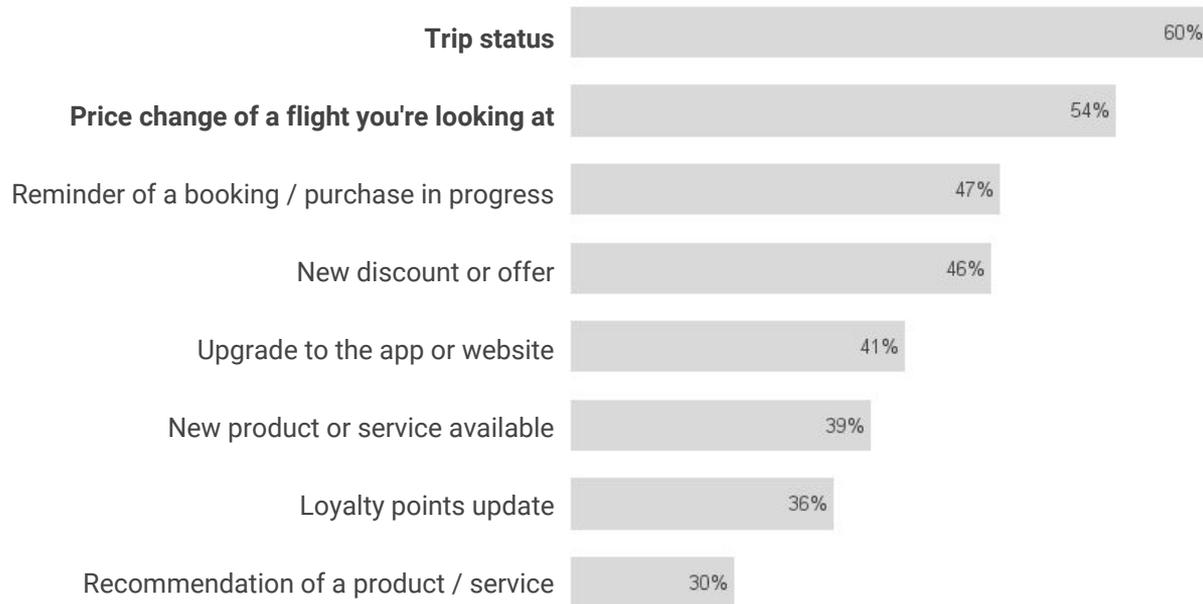


Useful notifications on phone

92%

find travel
notifications on
mobile **useful**

Most useful notifications



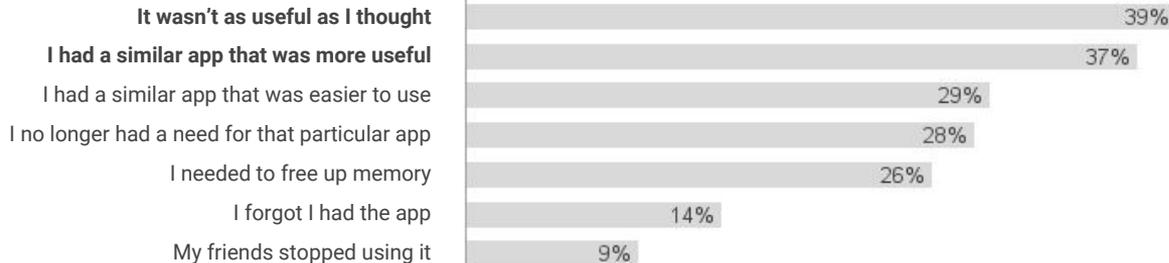
Base: 300

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?

Other apps covered
travel needs
55%

Was using for
one-off trip
50%

No longer customer of
company
23%

Base: 300

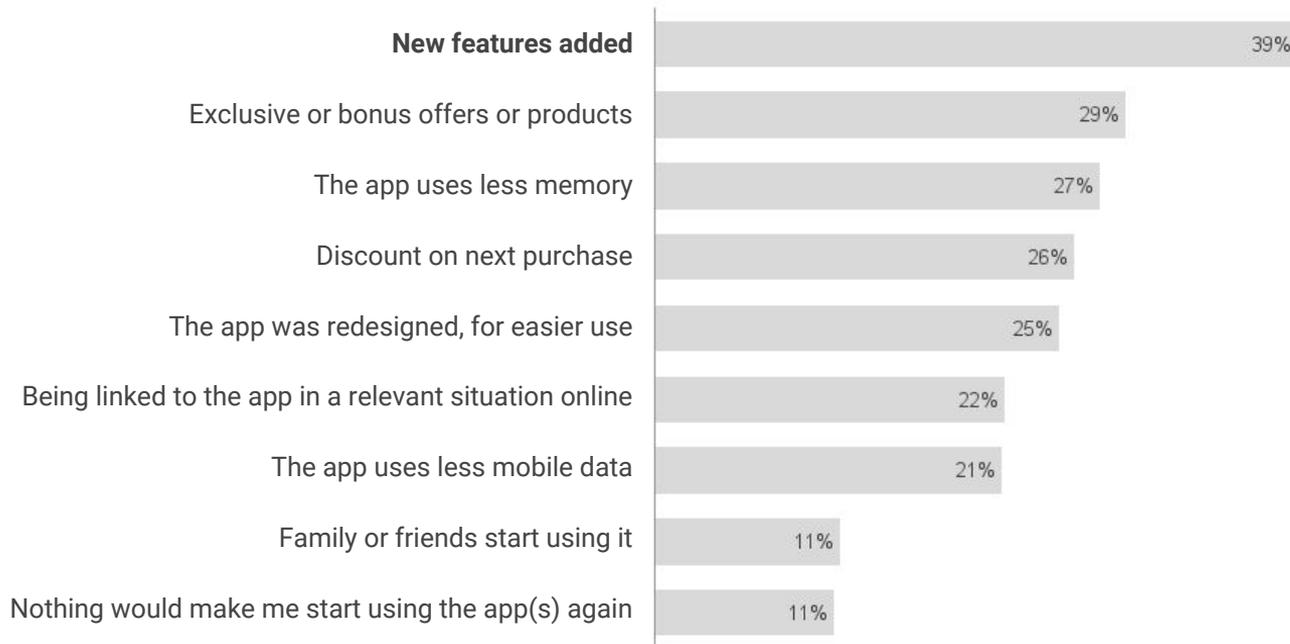
Q40. Have you stopped using travel apps on your smartphone for any of the reasons below? Select all that apply.

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=86)

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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Ipsos-Google Q3 2016

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