

| Travel on mobile / FR

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)	FR (also available for UK, US, CA, NL, SE, 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

The majority of travel apps are used on a monthly basis [slide 15]

For travel activities, mobile websites are used slightly more than apps [slide 9]

02

03

Security and range of features are key - with the sign-in, stored preferences for future activities preferred, and trip/booking status or discount notifications welcome [slide 26, 27]

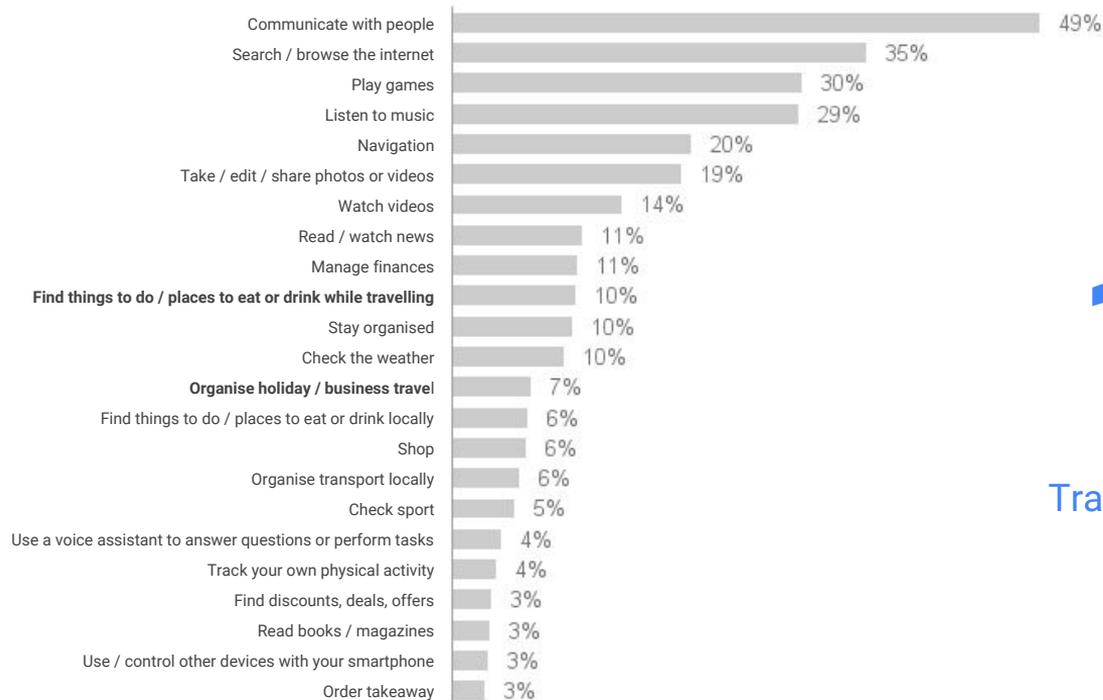
App re-design for easier use, less memory use, or exclusive/bonus offers can lead some to re-engage [slide 30]

04

| Smartphone activities

| Must have smartphone activities

Amongst those who use mobile for travel activities



16%

Travel activities (net)*

Base: 500 *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

23%

At least **daily**

59%

At least **weekly**

Travel activities on smartphone

Past 30 day activities

		Weekly	Daily
Looked at things to do / tourist information before visiting	33%	13%	5%
Looked for discounts or offers	29%	16%	7%
Looked at things to do / tourist information while travelling	28%	15%	8%
Checked flight times	27%	9%	4%
Looked at flight options	27%	10%	4%
Booked accommodation	26%	9%	5%
Looked at accommodation options	24%	9%	4%
Booked a flight	21%	8%	4%
Found address / contact information of a travel agency	19%	8%	3%
Used a digital ticket / boarding pass	18%	5%	2%
Made a last minute booking	17%	6%	3%
Watched videos about accommodation or the local area	17%	10%	4%
Checked into flight or accommodation	17%	6%	3%
Looked at rental car options	16%	7%	4%
Wrote a review for a destination	14%	7%	3%
Used a loyalty programme	12%	9%	4%

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

50%

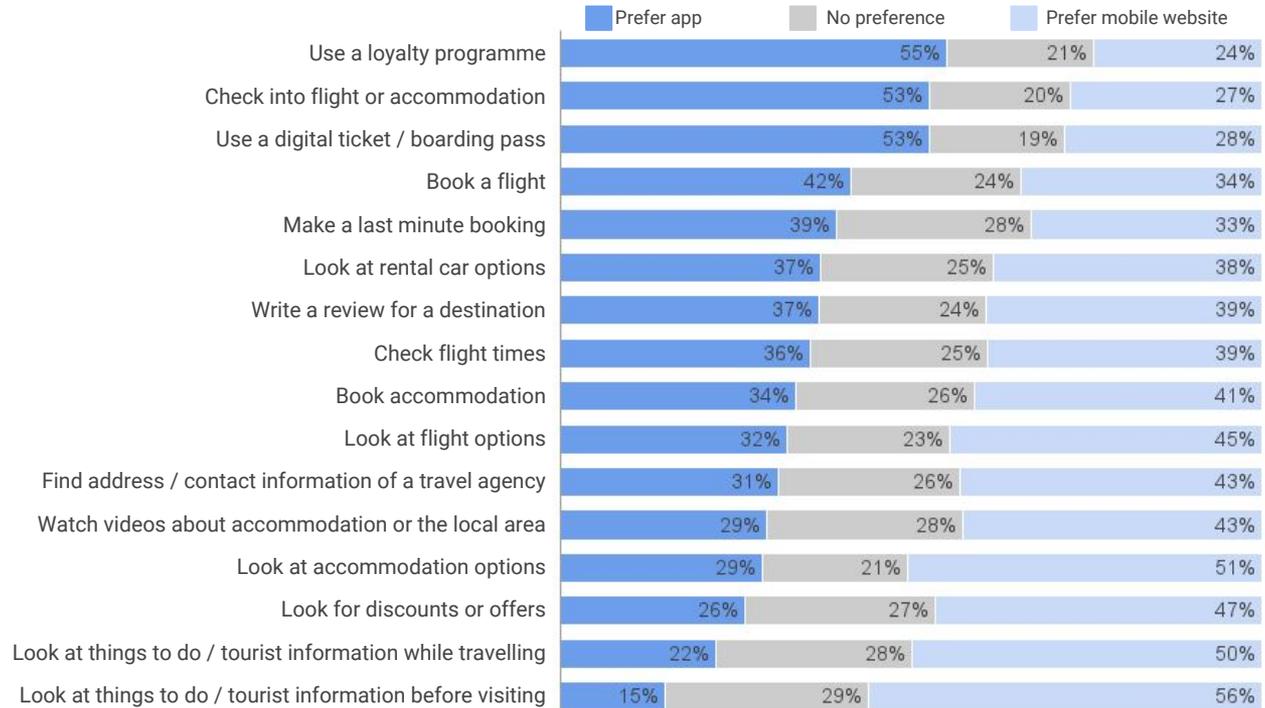
Used an app

63%

Used a mobile website

Preferences for top travel activities

Among those who have done activity in past 30 days



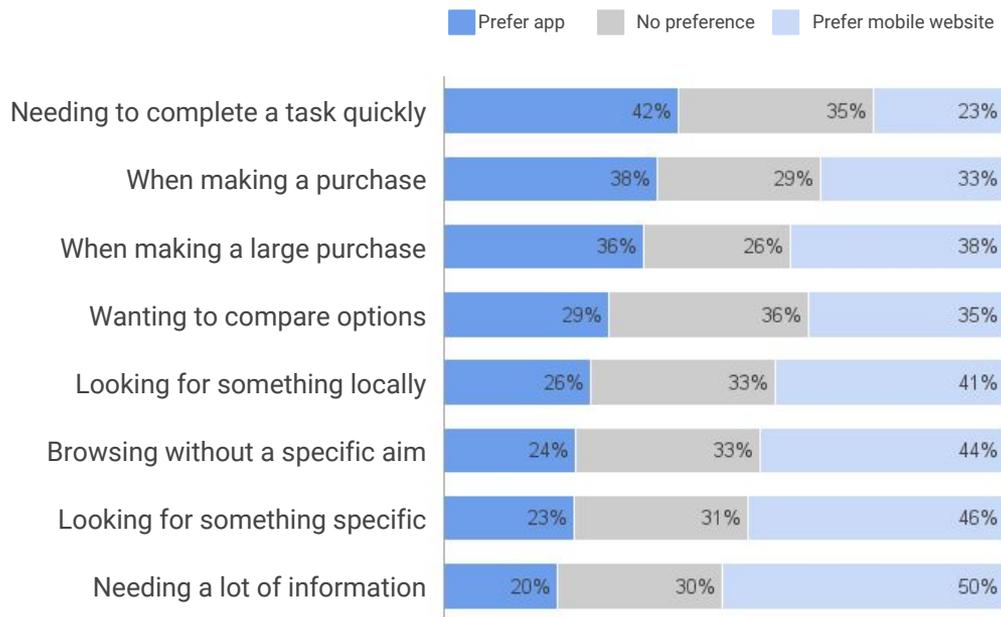
Base: 500

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



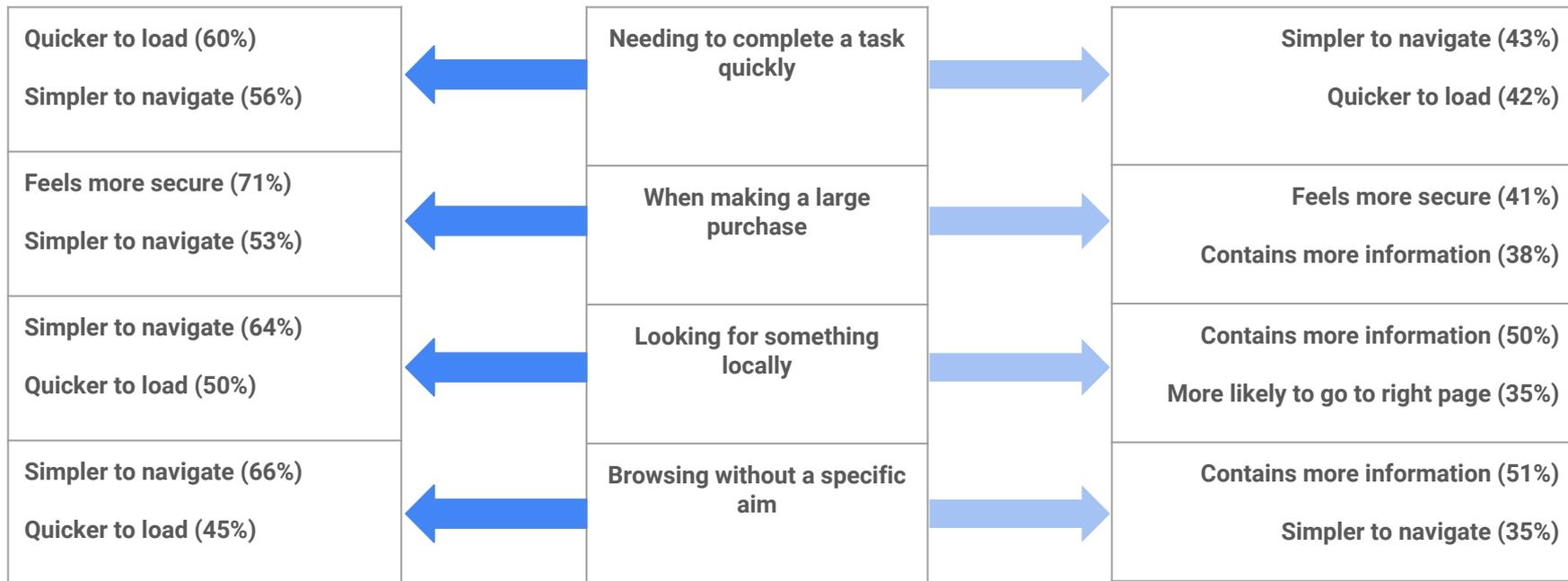
- For most travel situations, mobile websites are preferred.
- Top situations when mobile websites are preferred include: needing a lot of information, looking for something specific, and browsing without aim.
- Apps are preferred when needing to complete a task quickly.
- Preference when making a purchase is nearly split.

Top reasons for app vs mobile site preference

Top reasons app preferred

Situation

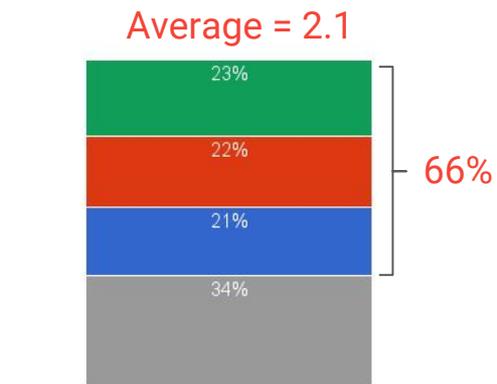
Top reasons mobile website preferred



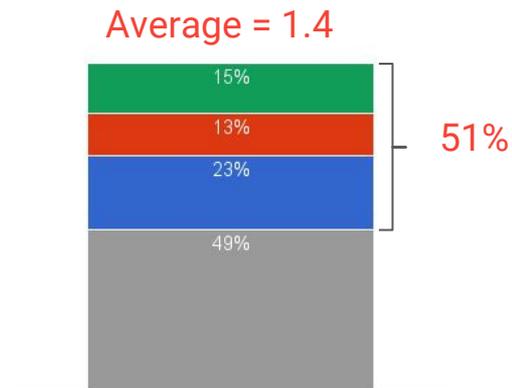
| App repertoire

| Number of travel apps installed

Currently installed



Installed past 3 months



None One app Two apps Three or more apps

Base: 500

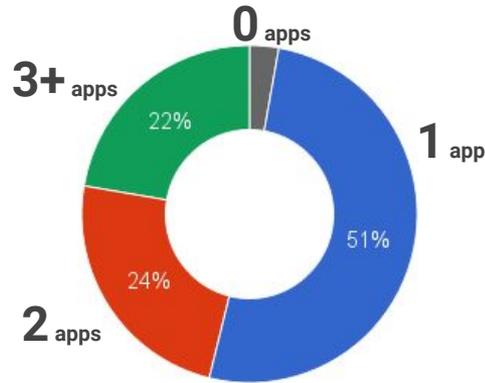
Q14. How many travel apps are installed on your smartphone (including any that were already installed when you bought it)?

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

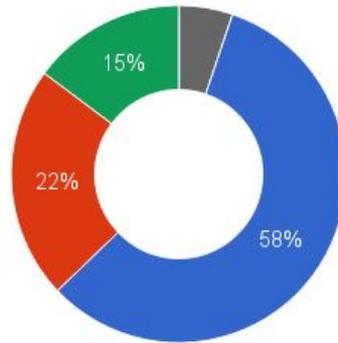
Lifecycle of new travel apps

Among those who installed a travel app in the past 3 months, an average of **2.7 apps were installed** in the past 3 months...

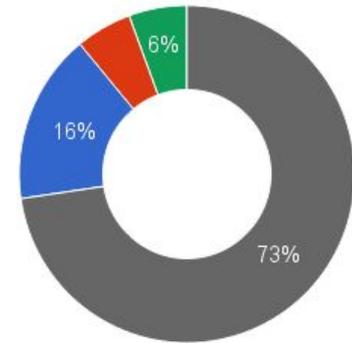
2.0 were ever opened
on average



1.6 were still in use
on average



1.1 were uninstalled
on average



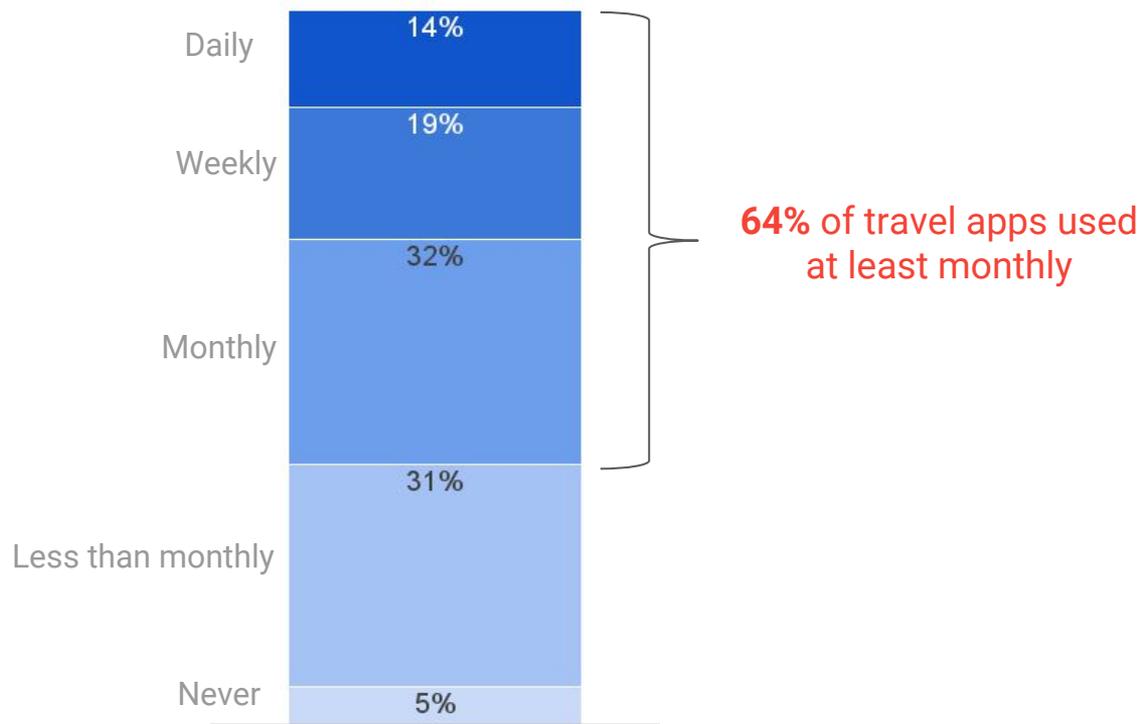
Base: Installed travel app(s) in the past 3 months (n=254)

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

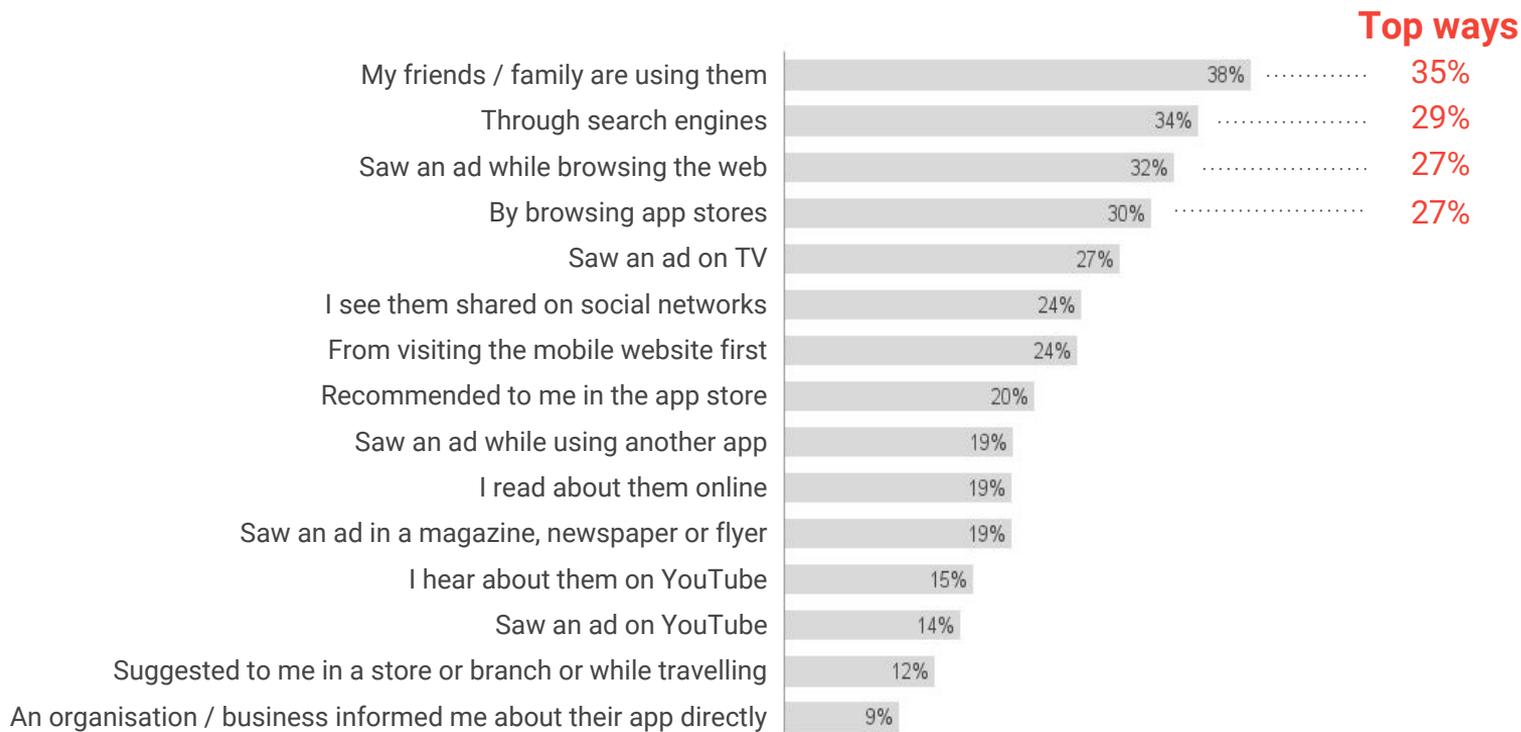
Q20. How many of those [VERTICAL] apps you've installed in the past 3 months are you still using now?

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



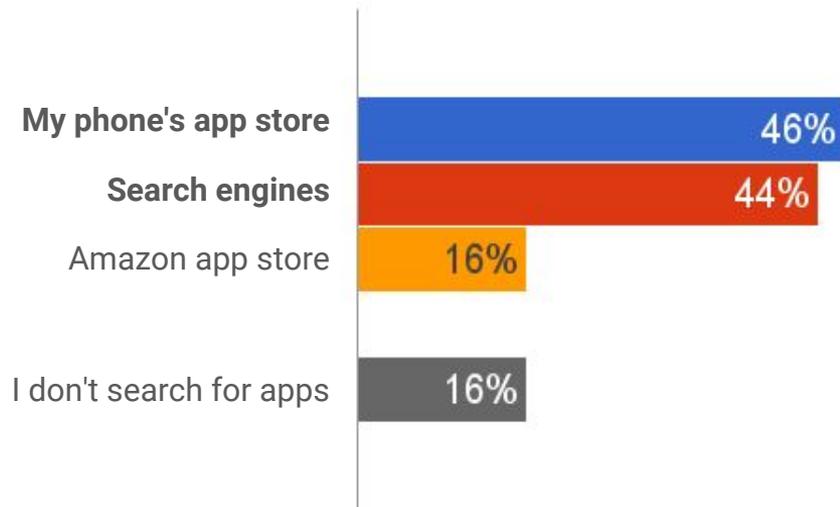
Base: 500

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

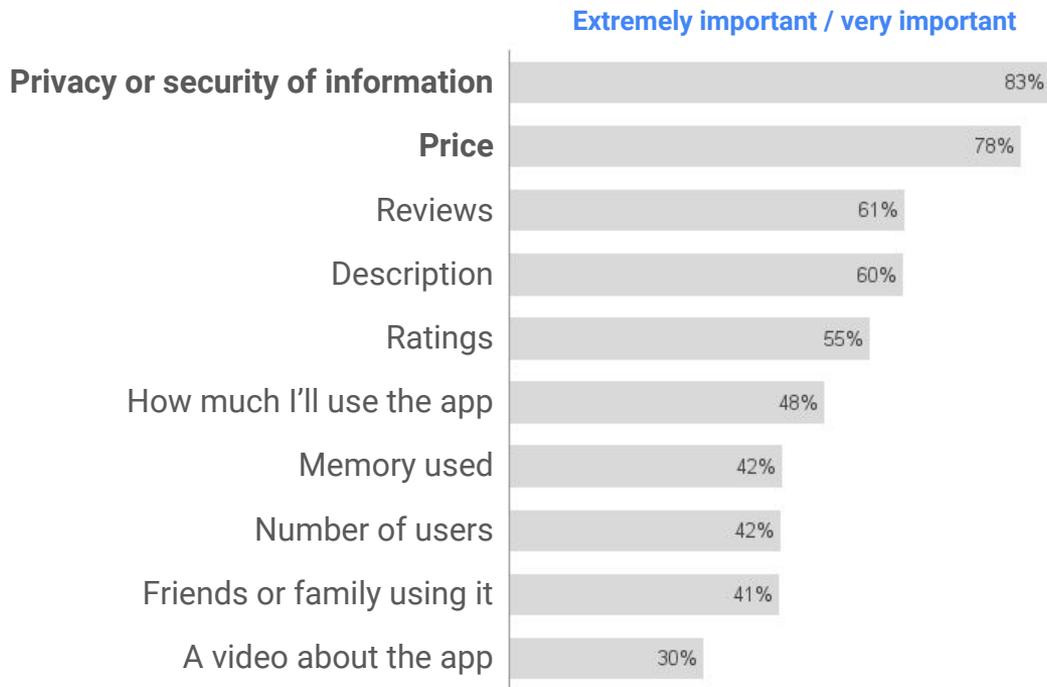
Q33. And have you found out about a travel app in any of these ways?

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



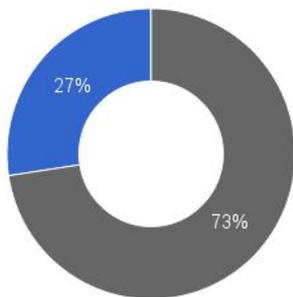
Base: Searches for apps on phone's app store (n=235)

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



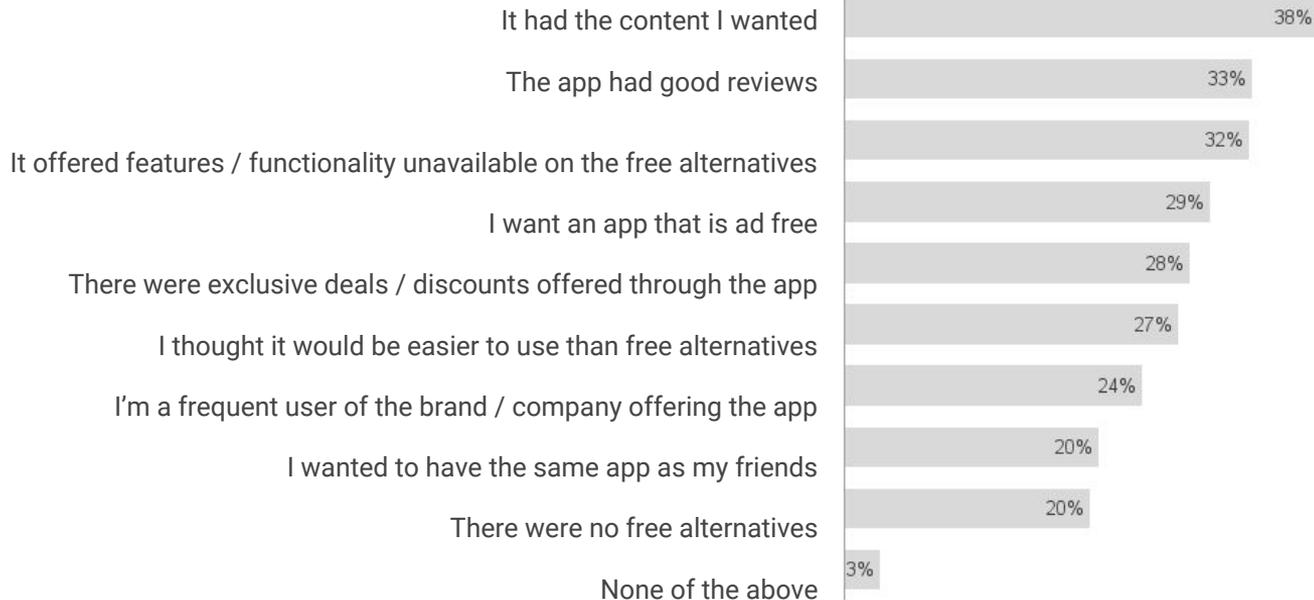
Reasons for paying for travel apps



Never paid to download travel app

Have paid to download travel app

Reasons for paying



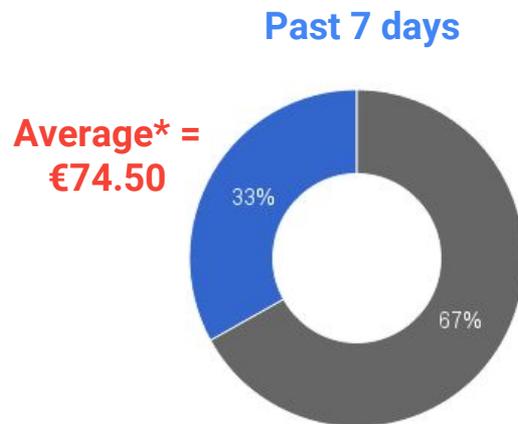
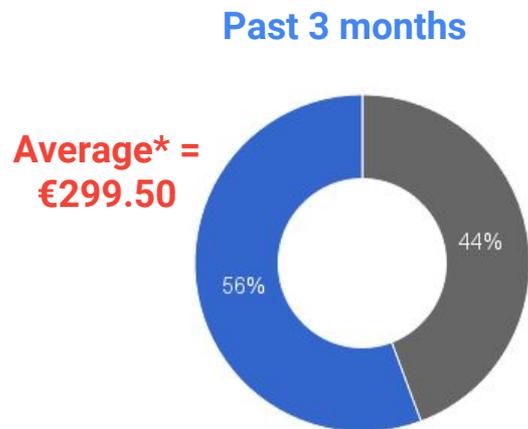
Base: 500 *Median

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=138)

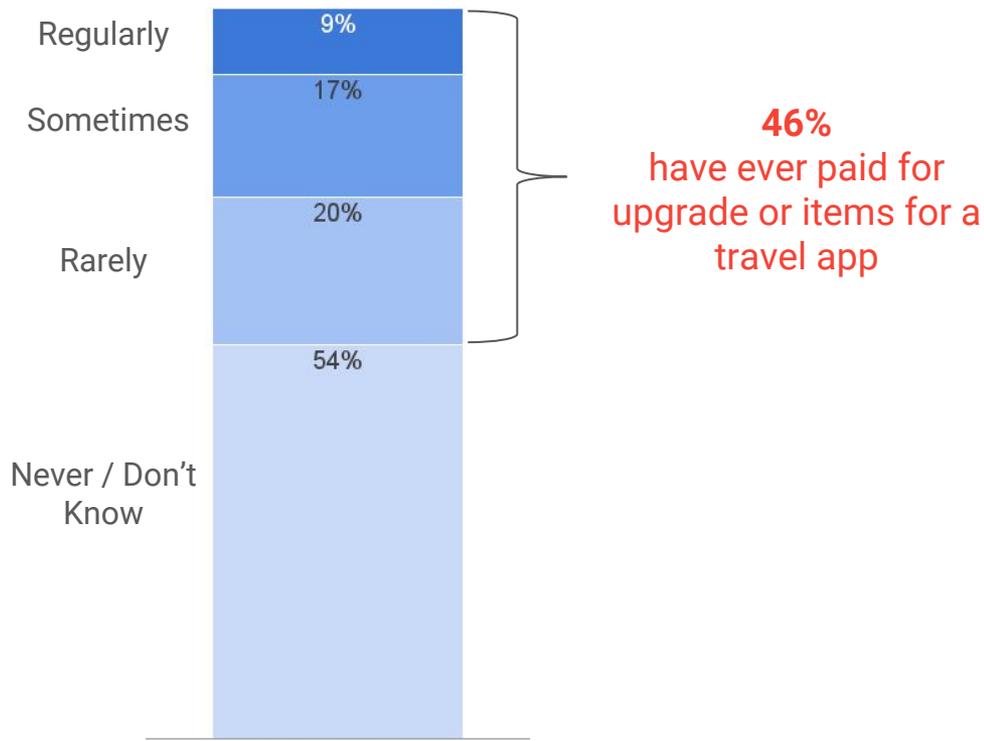
Q23. Why have you chosen to pay for travel apps over other free alternatives?

Smartphone spending for products/services



Have not spent money Spent money

Frequency of paying for app upgrades/items



| Preferences

| Favourite travel apps are.....



For a deeper look into the SNCF app, [see final section](#).

Characteristics of favourite apps



Preferred features for travel apps



Useful notifications on phone

88%

find travel
notifications on
mobile **useful**

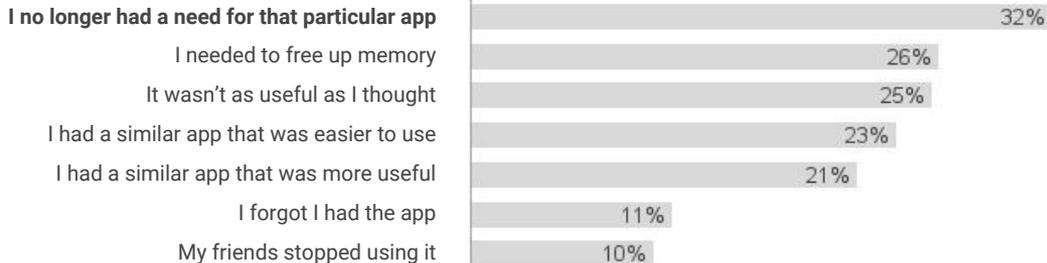
Most useful notifications



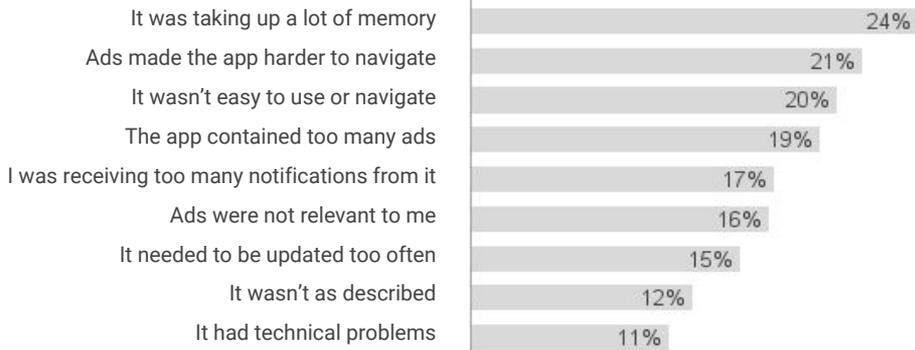
| Abandonment & re-engagement

Reasons for abandonment

Individual related



App related



Why no longer needed?

Other apps covered
travel needs
53%

Was using for
one-off trip
40%

No longer customer of
company
18%

Base: 500

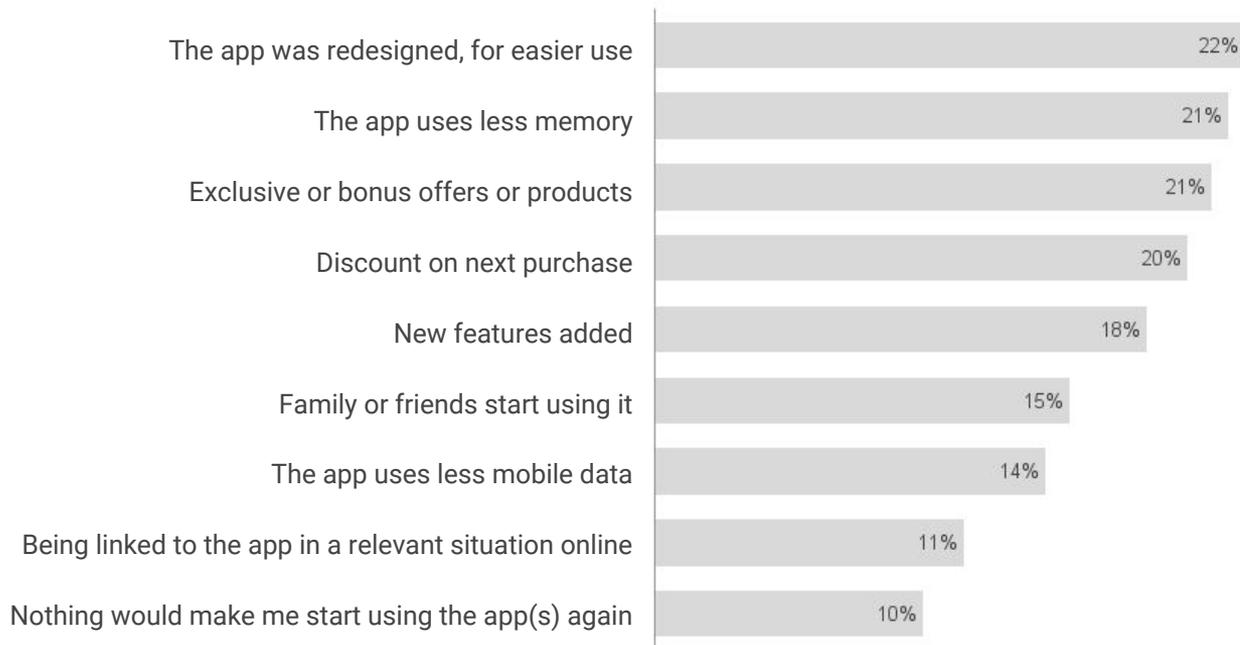
Q40. Have you stopped using travel apps on your smartphone for any of the reasons below? Select all that apply.

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=159)

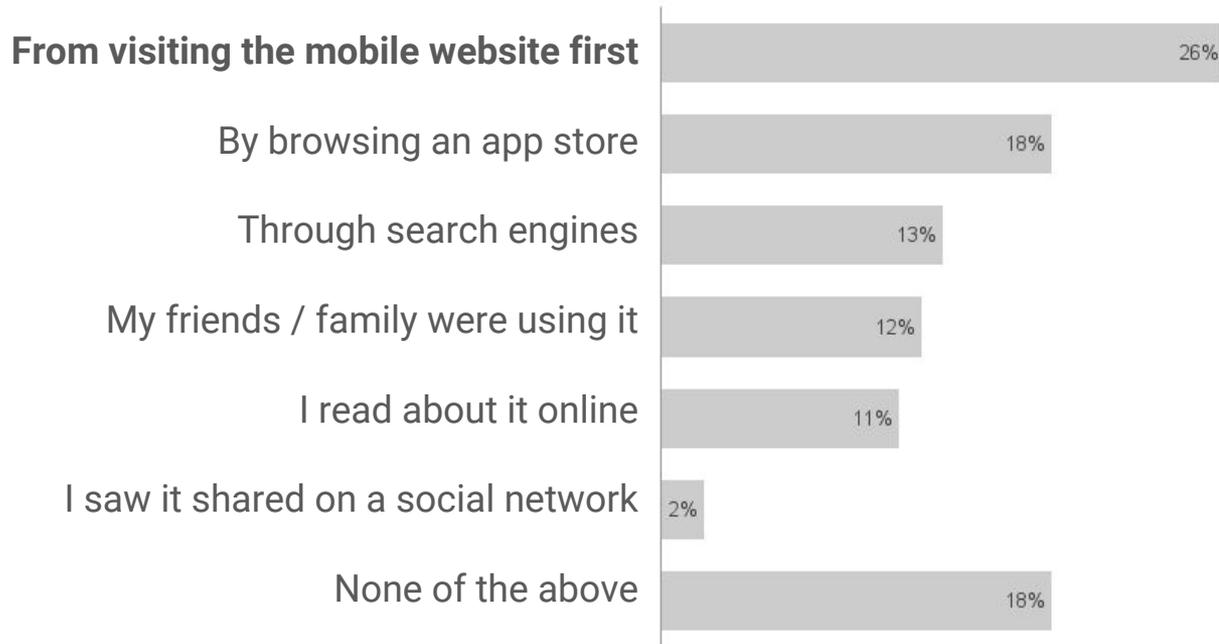
Q42. You said you've stopped using travel apps because you no longer had a need for it / them. Why did you no longer need it / them?

Reasons to re-engage

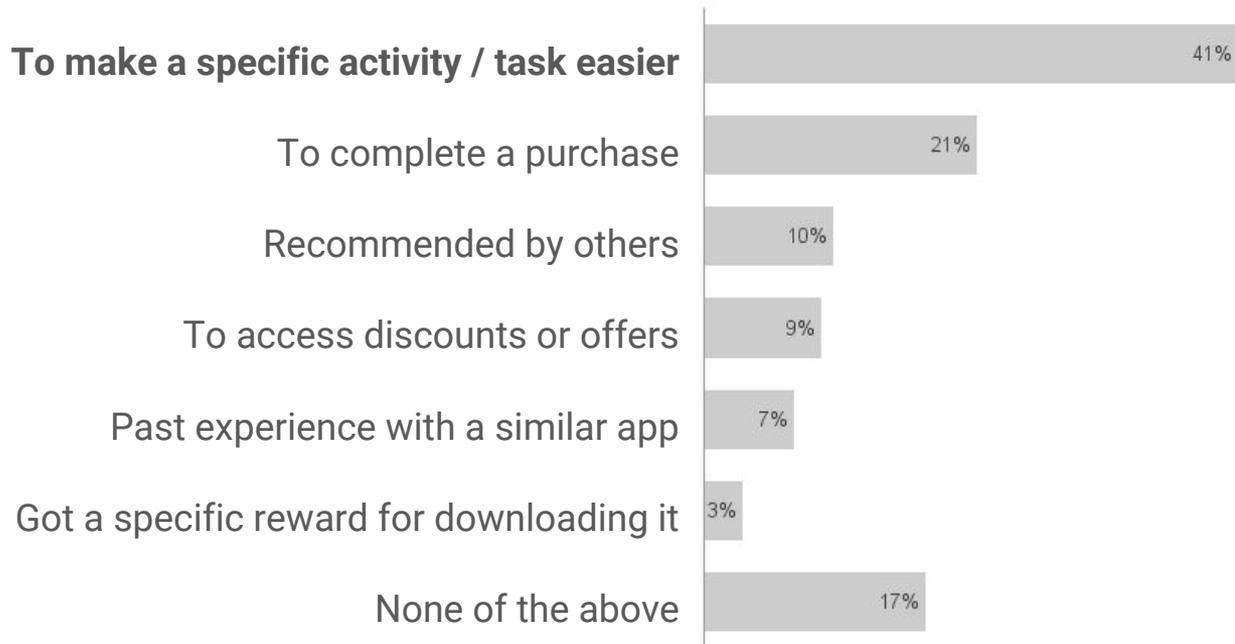


| Favourite app: SNCF

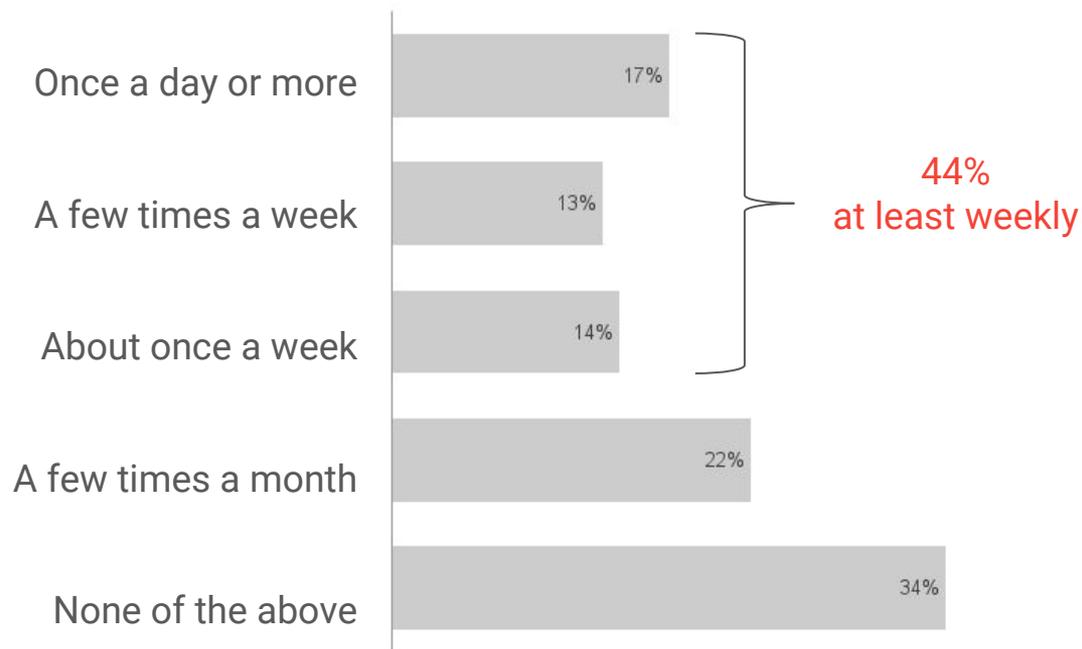
| SNCF app discovery



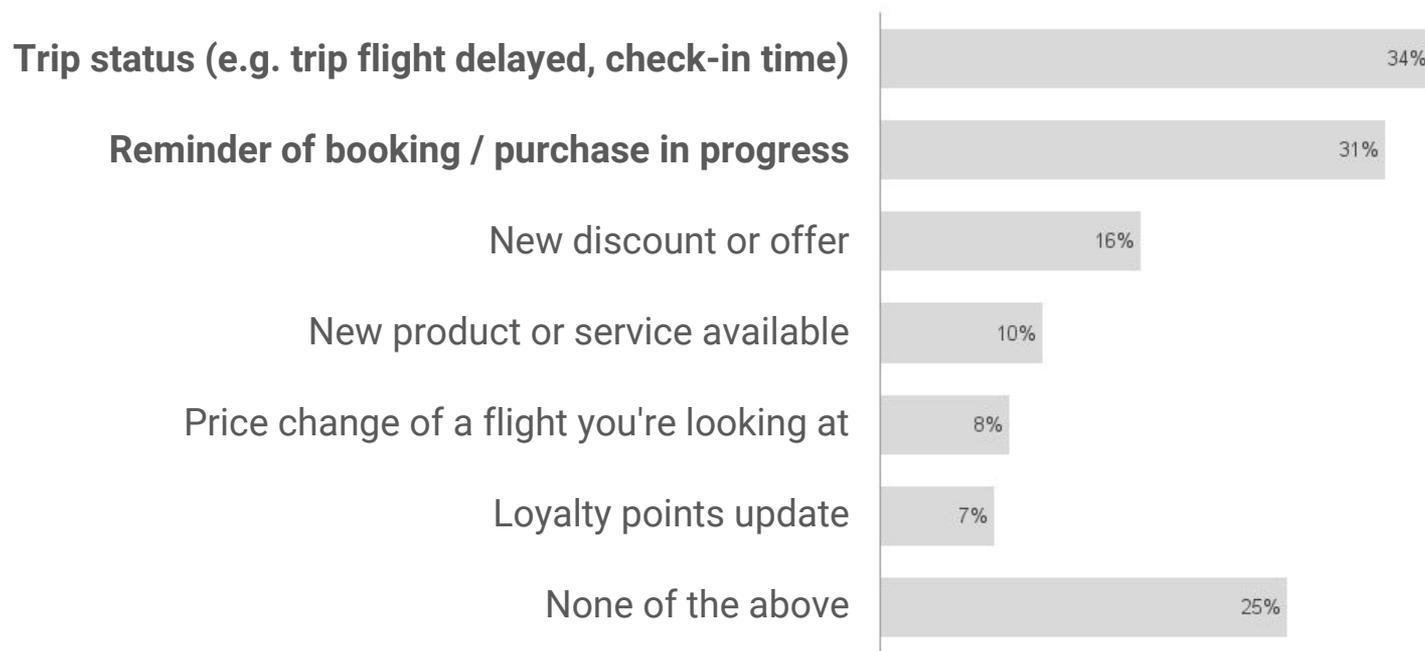
Reasons for downloading the SNCF app



Frequency of using the SNCF app



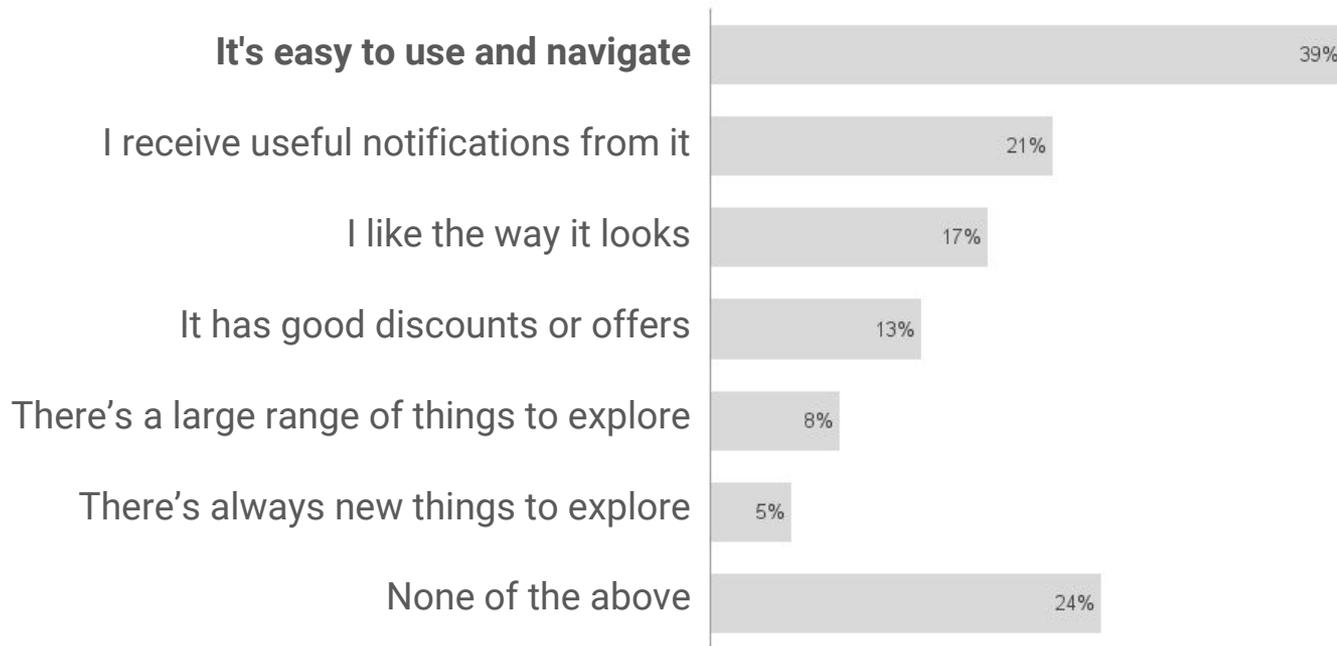
Useful SNCF app notifications



Base: 100

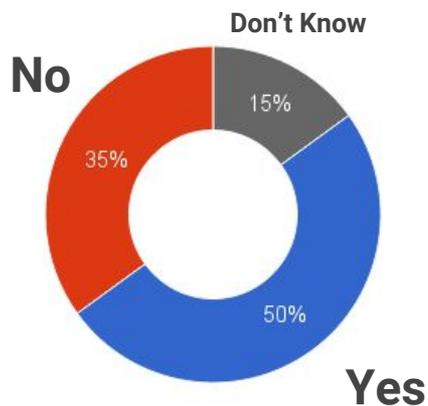
Q5. Which of the following notifications from the SNCF app have you found useful?

| Features liked about the SNCF app



Use of SNCF's mobile website

Used mobile website since getting the app?



Reasons to use mobile website instead of app

Looking for something specific

52%

Needing a lot of information

28%

Forgot I had the app

22%

When making a large purchase

22%

Browsing without a specific aim

18%

Looking for something locally

18%

Base: 100

Q9. Have you used SNCF's mobile website since getting the app?

Base: 50

Q10. Why did/do you use SNCF's mobile website instead of the app?

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