I Travel on mobile / UK

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 = 500 per vertical
Market(s)	UK (see <u>here</u> for US, CA, FR, NE, SE, RU, TU, IL, KSA)

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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 16]

For travel activities, mobile websites are used more than apps [slide 10]

02

03

Range of features and ease of use is key - with the storing of preferences for future activities preferred for easier use, and trip/booking status or discount notifications welcome [slide 27, 28]

App re-design for easier use or exclusive/bonus offers can lead some to re-engage [slide 31]



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Smartphone activities



Mobile usage for travel activities



Use their smartphone for travel-related activities

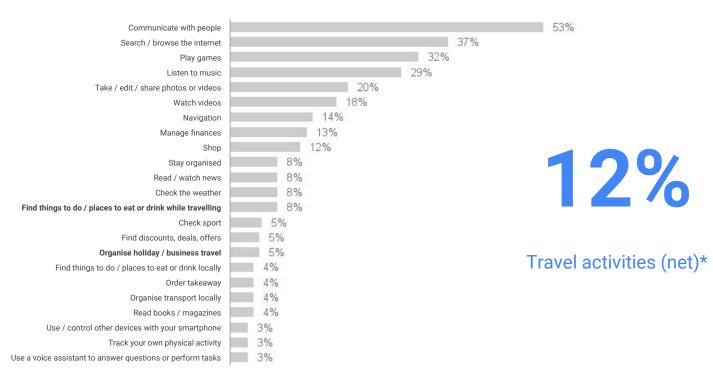
Q2. Below is a list of activities you can do using your smartphone. Please select all the activities you've done on your smartphone in the last 30 days. *Data for this question was taken from the 2016 App Landscape study.

Base: 1001*



Must have smartphone activities

Amongst those who use mobile for travel activities



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





At least daily

At least weekly

Base: 500 Q4. You've said you use your smartphone to do the following activities. How often do you do these on your smartphone? - Find things to do/places to eat while travelling; Organise holiday/business travel



Travel activities on smartphone

Past 30 day activities		Weekly	Daily
Looked for discounts or offers	41%	30%	12%
Looked at things to do / tourist information before visiting	35%	15%	5%
Looked at accommodation options	34%	14%	5%
Looked at things to do / tourist information while travelling	34%	17%	7%
Checked flight times	31%	9%	5%
Looked at flight options	29%	12%	5%
Watched videos about accommodation or the local area	23%	13%	6%
Booked accommodation	22%	7%	3%
Used a digital ticket / boarding pass	21%	7%	3%
Checked into flight or accommodation	20%	6%	3%
Booked a flight	18%	4%	2%
Found address / contact information of a travel agency	18%	10%	3%
Made a last minute booking	16%	5%	3%
Looked at rental car options	16%	7%	3%
Used a loyalty programme	13%	10%	5%
Wrote a review for a destination	13%	4%	3%

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?

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Usage of apps and sites for travel activities

Travel activities in past 30 days

50%

Used an app

67%

Used a mobile website

Preferences for top travel activities

Among those who have done activity in past 30 days

	Prefer app	No	preference	Prefer mobile	website
Use a digital ticket / boarding pass			58%	17%	25%
Use for loyalty programme			52%	31%	17%
Check into flight or accommodation		47	%	24%	29%
Book accommodation		42%	16%		42%
Write a review for a destination	1	42%		27%	31%
Check flight times		42%	19%		39%
Look at rental car options		42%	18%		40%
Book a flight		40%	21%		39%
Make a last minute booking		37%	2	9%	34%
Look at flight options		36%	24%		40%
Watch videos about accommodation or the local area		34%	29%	6	37%
Look for discounts or offers		34%	28%		38%
Look at things to do \slash to urist information while travelling	29%	6	28%		43%
Look at accommodation options	27%		23%		50%
Find address / contact information of a travel agency	26%		28%		46%
Look at things to do / tourist information before visiting	25%		26%		49%

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.

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

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Platform preferences for travel situations

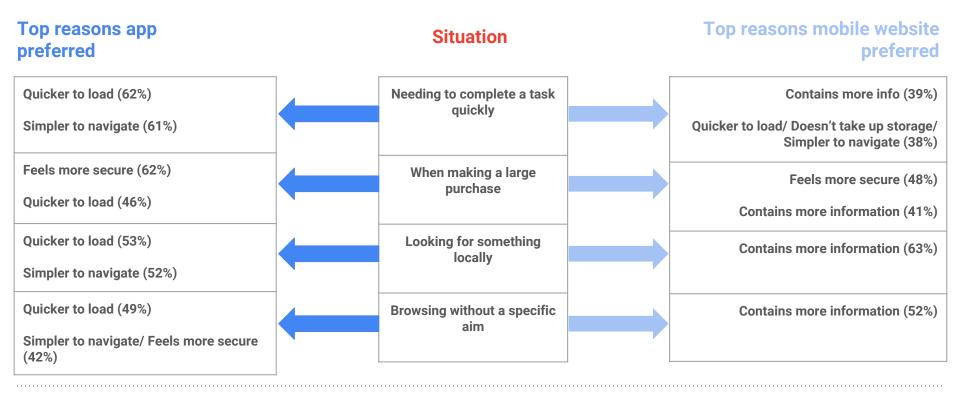
No preference Prefer mobile website

		_	
	49%	25%	26%
38%	6	31%	31%
31%	3'	1%	38%
31%	27%	1	42%
30%	31	%	39%
27%	24%		49%
20%	24%		56%
18%	30%		52%
	31% 31% 30% 27% 20%	38% 31% 31% 27% 30% 27% 22%	38% 31% 31% 31% 31% 27% 30% 31% 27% 24%

Prefer app

- For most travel-related situations, there doesn't appear to be a strong preference for one platform over the other
- Apps are generally preferred for quicker tasks
- There is slight lean for apps when making a purchase, while large purchases lean toward mobile sites
- Mobile sites are preferred for occasions when lots of information is needed

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...?

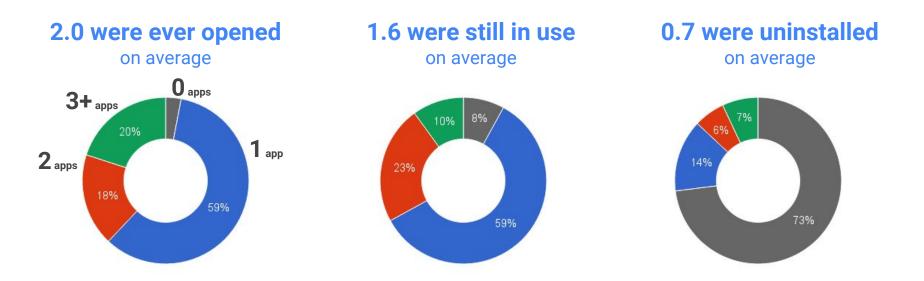
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App repertoire



Lifecycle of new travel apps

Among those who installed a travel app in the past 3 months, an average of **2.5 apps were installed** in the past 3 months...



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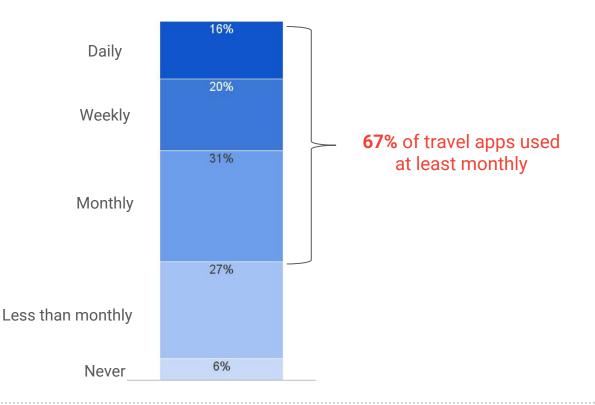
Base: Installed travel app(s) in the past 3 months (n=273)

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=363) Q15. Roughly what percentage of the travel apps are installed on your smartphone do you use...?



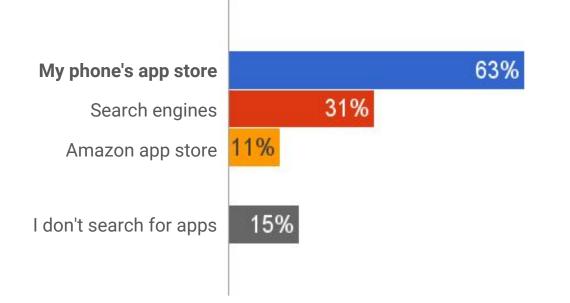
Ways to find out about travel apps

	Top 3 ways
By browsing app stores	38%
My friends / family are using them	35%
Saw an ad while browsing the web	32%
Through search engines	29%
Saw an ad on TV	25%
From visiting the mobile website first	24%
Recommended to me in the app store	24%
I read about them online	23%
I see them shared on social networks	21%
Saw an ad while using another app	18%
Saw an ad on YouTube	17%
Suggested to me in a store or branch or while travelling	15%
Saw an ad in a magazine, newspaper or flyer	14%
I hear about them on YouTube	13%
An organisation / business informed me about their app directly	11%



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





Base: 500 Q36. Where do you search for travel apps?

App store download decision factors

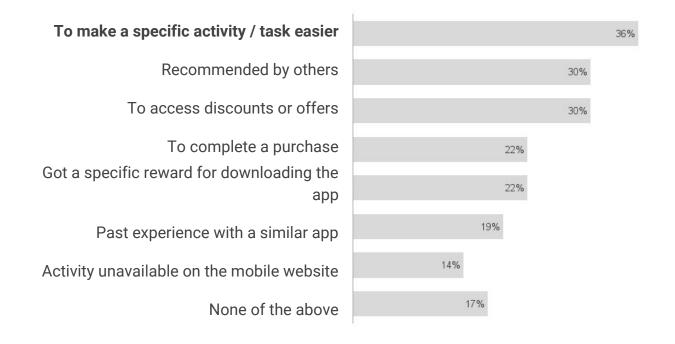
Privacy or security of information 88% Price 76% Reviews 67% Ratings 64% Description 60% How much I'll use the app 58% Memory used 49% Number of users 35% Friends or family using it 33% A video about the app 26%

Extremely important / very important



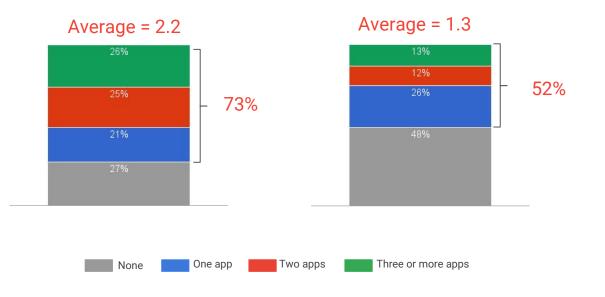
Base: Searches for apps on phone's app store (n=312) Q38. When searching for travel apps in your smartphone's app store, how important are the following factors when making a decision about which app(s) to download?

Reasons for downloading travel apps



Number of travel apps installed

Currently installed



Installed past 3 months

Base: 500

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

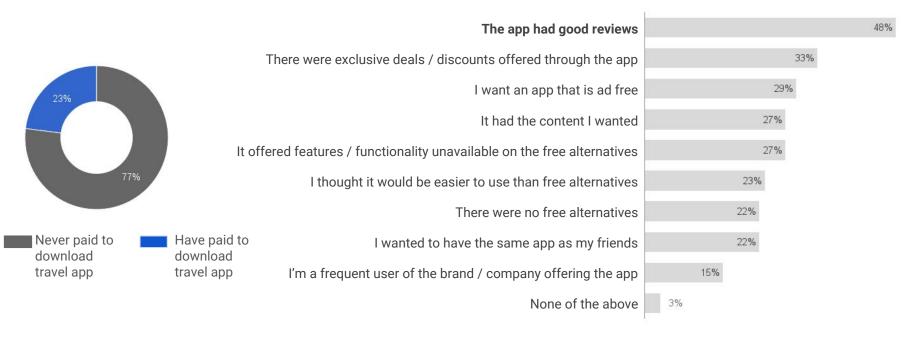
Q18. How many travel apps have you installed on your smartphone in the past 3 months, including apps you've since uninstalled?



Reasons for paying for travel apps

Reasons for paying

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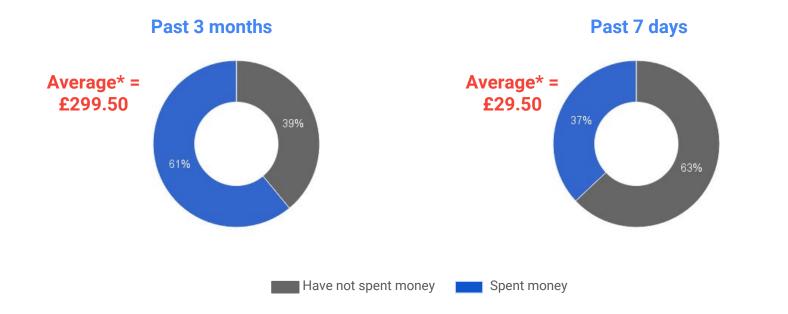
Base: 500 *Median

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=116)

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

Smartphone spending for products/services

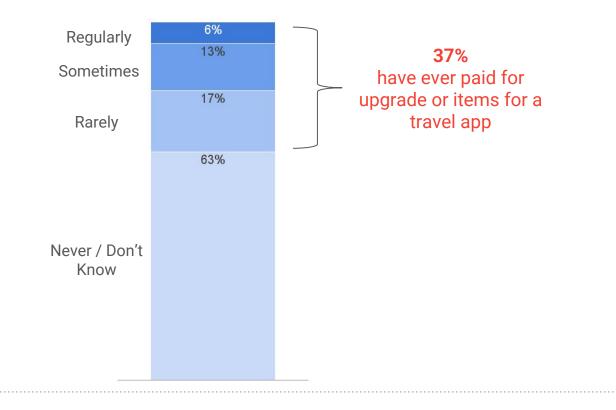


Base: 500 *Median

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...

Virgin/Virgin Travel **British Airways** Travelodge Thomas Cook Expedia Ryanair Booking.com Tripit Trip Advisor Google Airbnb Uber Hotels.com Thomsons **Trivago** Easyjet Google maps Skyscanner ^{Citymapper} Lastminute.com Trainline National Rail

For a deeper look into the TripAdvisor app, see final section.



Characteristics of favourite apps

They're easy to use and navigate	
They have good discounts or offers	32%
There's a large range of things to explore	29%
I like the way they look	27%
I receive useful notifications from them	26%
They're from a brand or company I use a lot in the real world	25%
I've personalised them so I get the best experience	23%
There's always new things to explore	23%
None of the above	9%



53%

Preferred features for travel apps

	Prefer	No pref	erence		Do not p	refer	
s			60%			33%	7%
r			59%		3′	1%	10%
s			56%		34	1%	10%
n		5	3%		34%	6	13%
у		47%			4	4%	9%
е		43%			37%		20%
р		41%			39%		20%
er		33%	03	36%			31%
s	26%		39%	16			35%
е	21%		36%				43%

Has a wide range of features Stores my preferences to make future activities easier Requires sign in for secure access Uses my current location to provide relevant local information Specializes in a small number of features that I use frequently Stores personal information for a more personalized experience Is free to download but has ads within the app Stores my credit card / billing information to make future purchases faster Is linked to my social networks Charges a fee to download but is ad-free



Useful notifications on phone

Trip status (e.g. flight delayed, check-in time) 43% New discount or offer 42% 89% 42% Reminder of a booking / purchase in progress 36% find travel Price change of a flight you're looking at notifications on 25% Upgrade to the app itself (e.g. new feature added) mobile **useful** 25% Loyalty points update 24% New product or service available 21% Recommendation of a product / service

Most useful notifications

Open ended responses:

"A delay in flight, was able to properly organise time, had extra time for last minute packing"

"A deal on a holiday that I was looking at which was the cheapest it's ever been"

"Reminding me of a flight time the day before I was leaving, turns out I'd remembered it wrong so it saved me setting off at the wrong time"

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Base: 500 029 Apps or websites can give you notifica

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? Q30. What is the most useful travel notification you have ever received on your smartphone?

Abandonment & re-engagement



Reasons for abandonment

Individual related

I needed to free up memory
It wasn't as useful as I thought
I had a similar app that was easier to use
I had a similar app that was more useful
I forgot I had the app
My friends stopped using it
It was taking up a lot of memory
The app contained too many ads
It wasn't easy to use or navigate
Ads made the app harder to navigate
as receiving too many notifications from it
o y

Ads were not relevant to me It had technical problems It wasn't as described

I no longer had a need for that particular app

28%				
26%				
	20%			
	19%			
	%	1		
			8%	
24%				
	20%			
	18%			
	7%			
		15		
		15		
		14%		
		13%		
		12%		

31%

Why no longer needed?

Was using for one-off
trip
51%

Other apps covered travel needs 45%

No longer customer of company 26%

Base: 500

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

It needed to be updated too often

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=104)

I was

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?



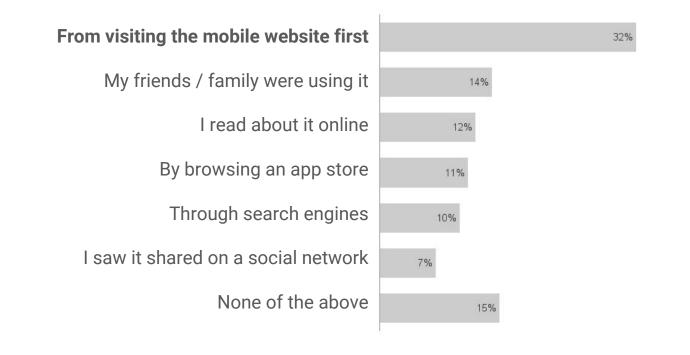
Reasons to re-engage

The app was redesigned, for easier use		26%
Exclusive or bonus offers or products		24%
The app uses less memory		23%
New features added	21	%
The app uses less mobile data	20%	
Discount on next purchase	20%	
Family or friends start using it	11%	
Being linked to the app in a relevant situation online	11%	
Nothing would make me start using the app(s) again	5%	



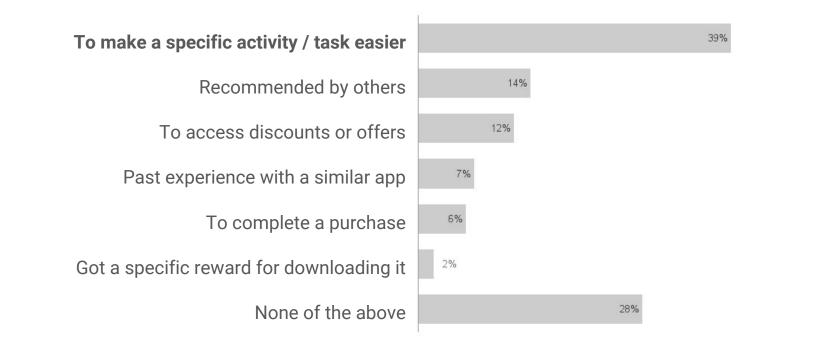
Favourite app: TripAdvisor

TripAdvisor app discovery



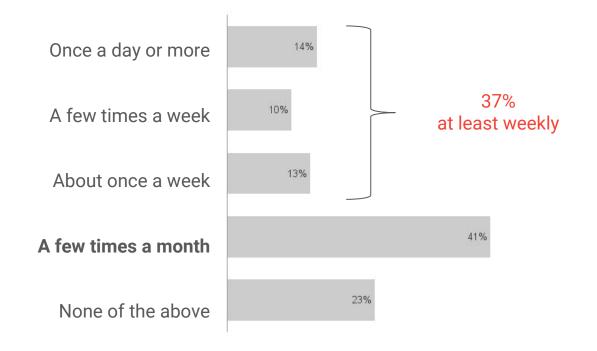
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Reasons for downloading the TripAdvisor app



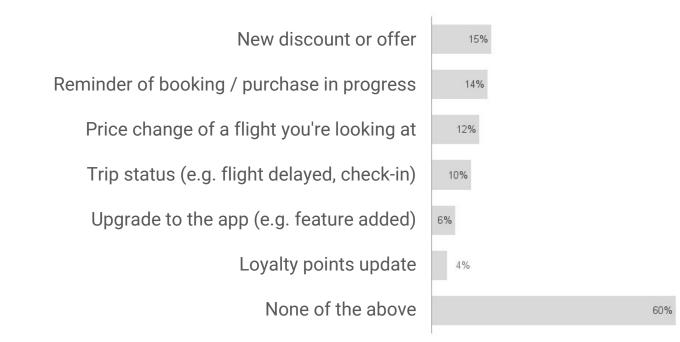


Frequency of using the TripAdvisor app



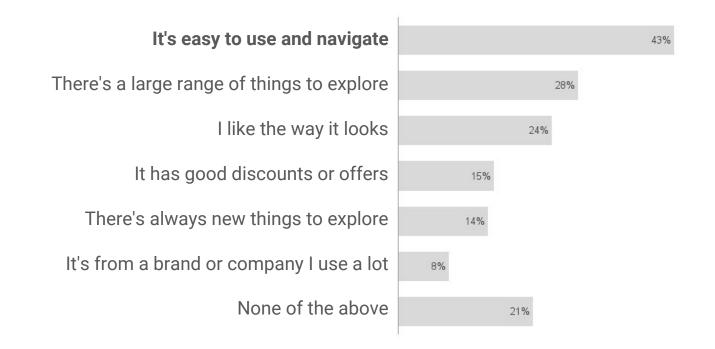


Useful TripAdvisor app notifications



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Features liked about the TripAdvisor app





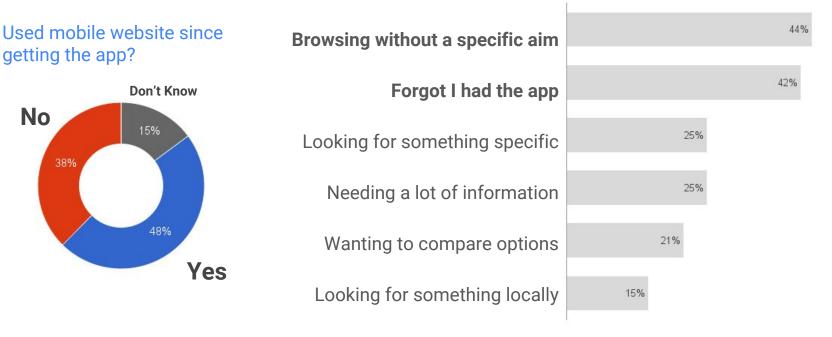
Suggested improvements for the TripAdvisor app

Features/Functionality	more functionality
reatures/runetionality	clear search bar
	default list of ranking of hotels and restaurants and not initially recommended
	easier to search specific region with more filters e.g when looking for a good place to have dinner in a new city
	flight tracking
	search function was easier on the app before the latest update
	don't force open when searching through google
	stop the pop up box telling you to turn your device sideways for a better view get rewards for making reviews
	uses too much memory on my phone
Content-related	add an entry for pubs near me
	cheap holiday deals
	more reviews
	reduce information overload
Faster/Quicker	make faster
	quicker to load



Use of TripAdvisor's mobile website

Reasons to use mobile website instead of app





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Ipsos-Google Q3 2016

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