The role of mobile for the 2012 traveler

Google/Ipsos OTX MediaCT
U.S., July 2012

Research methodology

- Google commissioned OTX, an independent marketing research company, to conduct a travel tracking study to better understand the role travel plays in the lives of U.S.

- Respondents completed a 21 minute attitude & usage survey into travel habits and attitudes. If qualified, respondents were routed to one of four deep dive sections: Airline, Cruise, Lodgings, and Car Rental

- Interviews were conducted from 4/24/12 to 5/17/12 yielding a total sample of 5,000 consumers who have traveled at least once for leisure reasons (or a minimum of 3 times for business purposes) in the past six months

- An augment of 1,500 affluent leisure travelers and 1,000 cruisers were also recruited

Google

Traveler types defined

Leisure traveler
*has taken at least
one trip for leisure
in the past 6 months*

Business traveler
*has taken at least
three trips for business
in the past 6 months*

Affluent traveler
*has taken at least one trip
for leisure in the past
6 months and has a
household income of $250K+*

Key findings

1 More travelers are using mobile to access travel information than in past years

2 Mobile usage has risen among affluent travelers looking for travel information, as desktop usage has declined

3 Travel apps are frequently downloaded from online ad clicks and essential for brands with loyalty programs

4 Travel bookings on mobile are happening across all subverticals. Business travelers book on mobile most frequently, and use their devices to book last minutes deals

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Mobile traveler online behavior

More travelers use mobile for travel information

Percentage of travelers who use a mobile device to access internet for travel information

- Leisure travelers
- Business travelers

Year	Leisure travelers	Business travelers
2009	8%	25%
2010	18%	40%
2011	31%	56%
2012	38%	57%
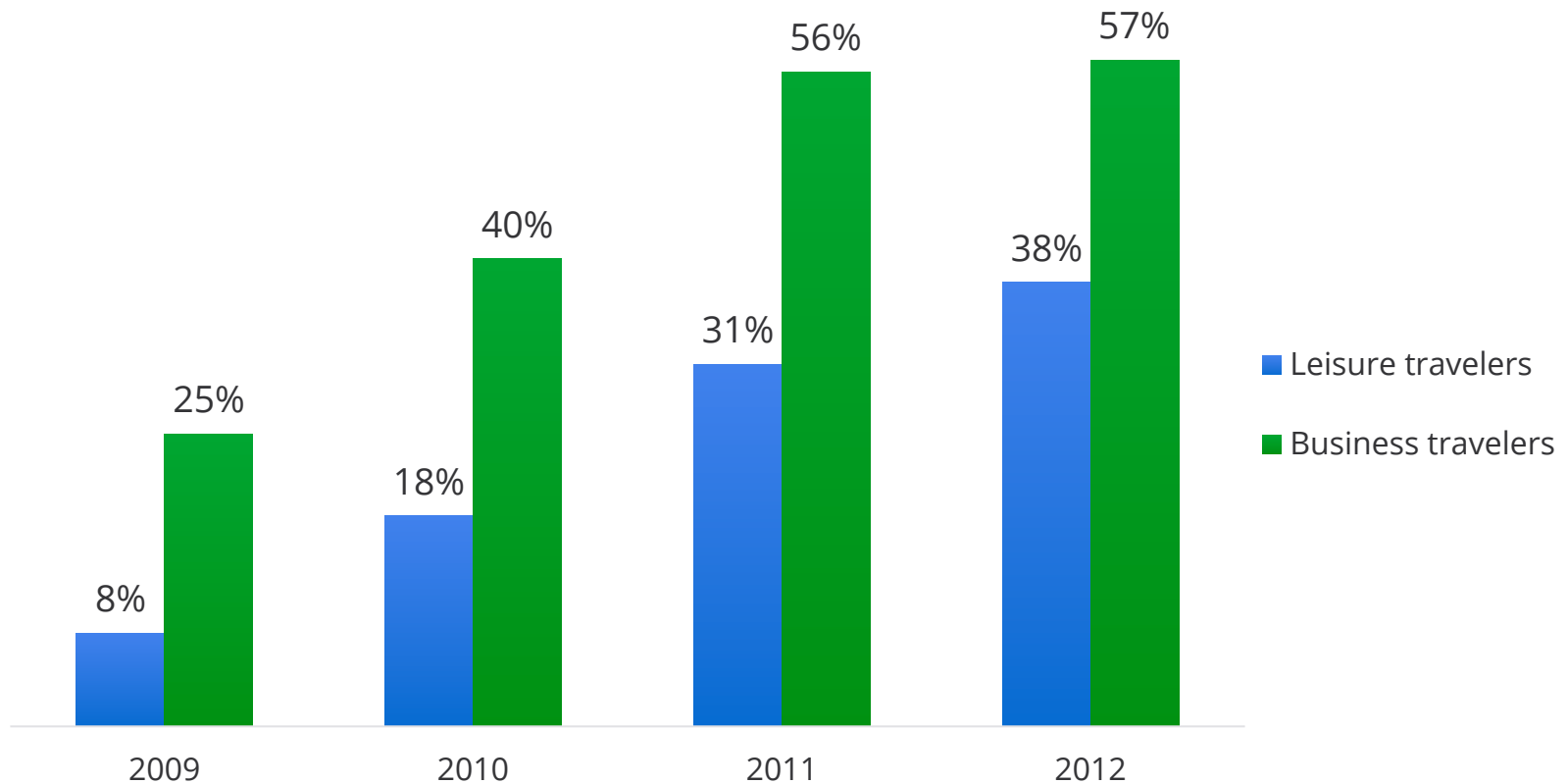
Information is accessed across screens

Where travel-related info is accessed by leisure travelers

Home computer	Office or work computer	Smartphone/Mobile phone	Mobile device*
94%	24%	31%	17%
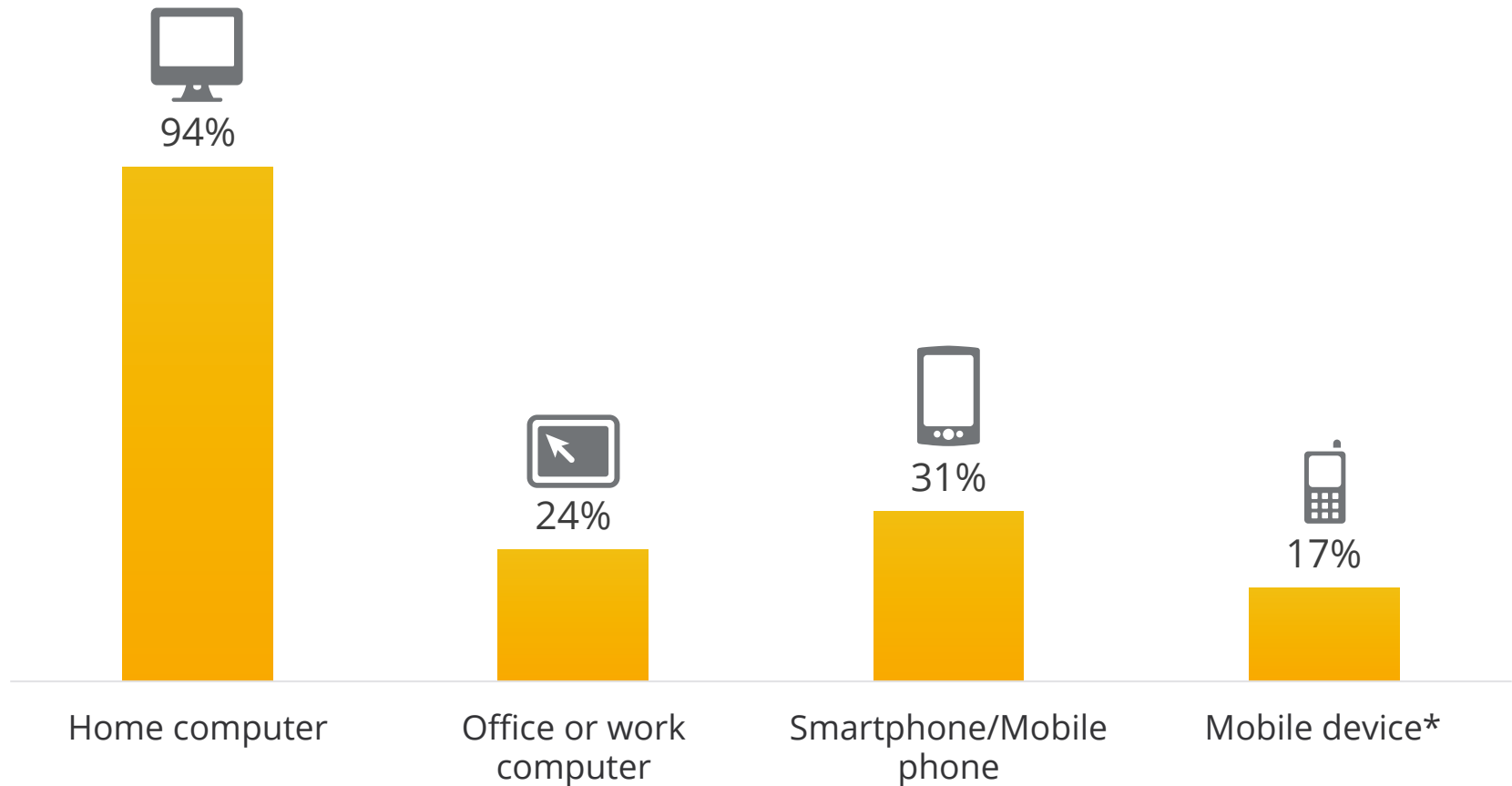
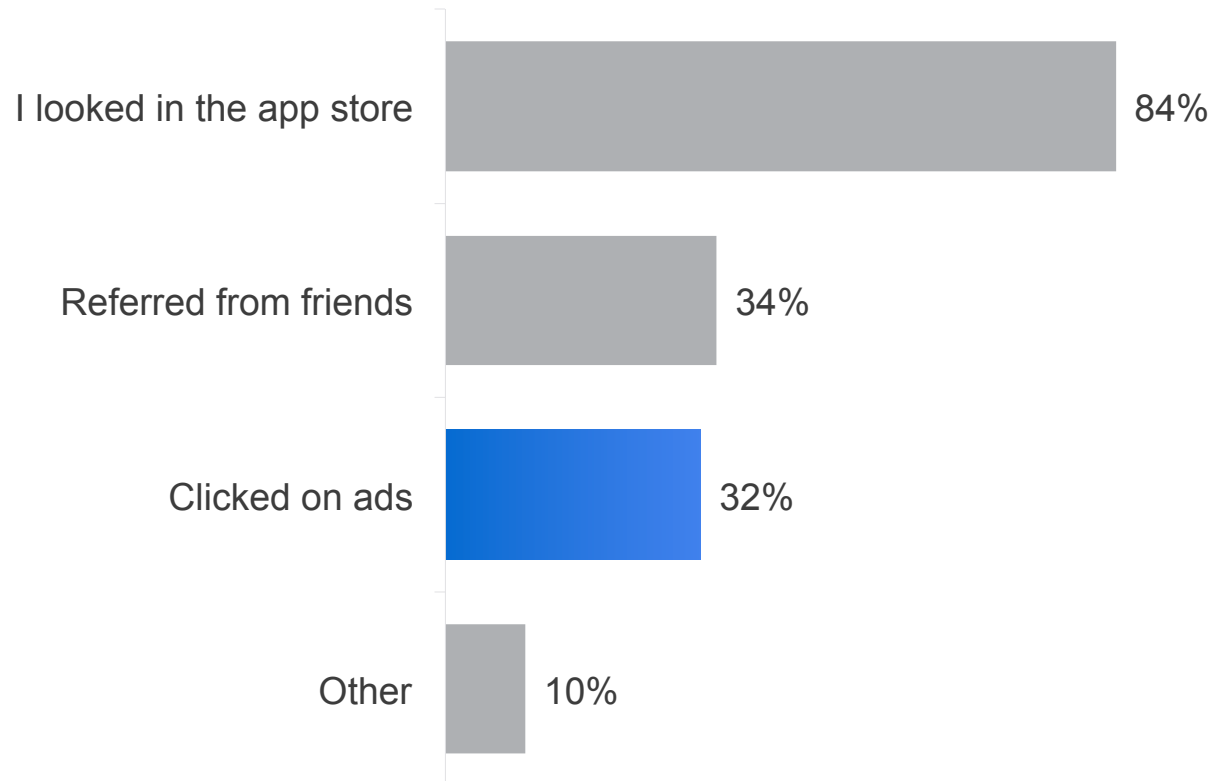Affluent device use is shifting to mobile

Where travel-related info is accessed by affluent travelers
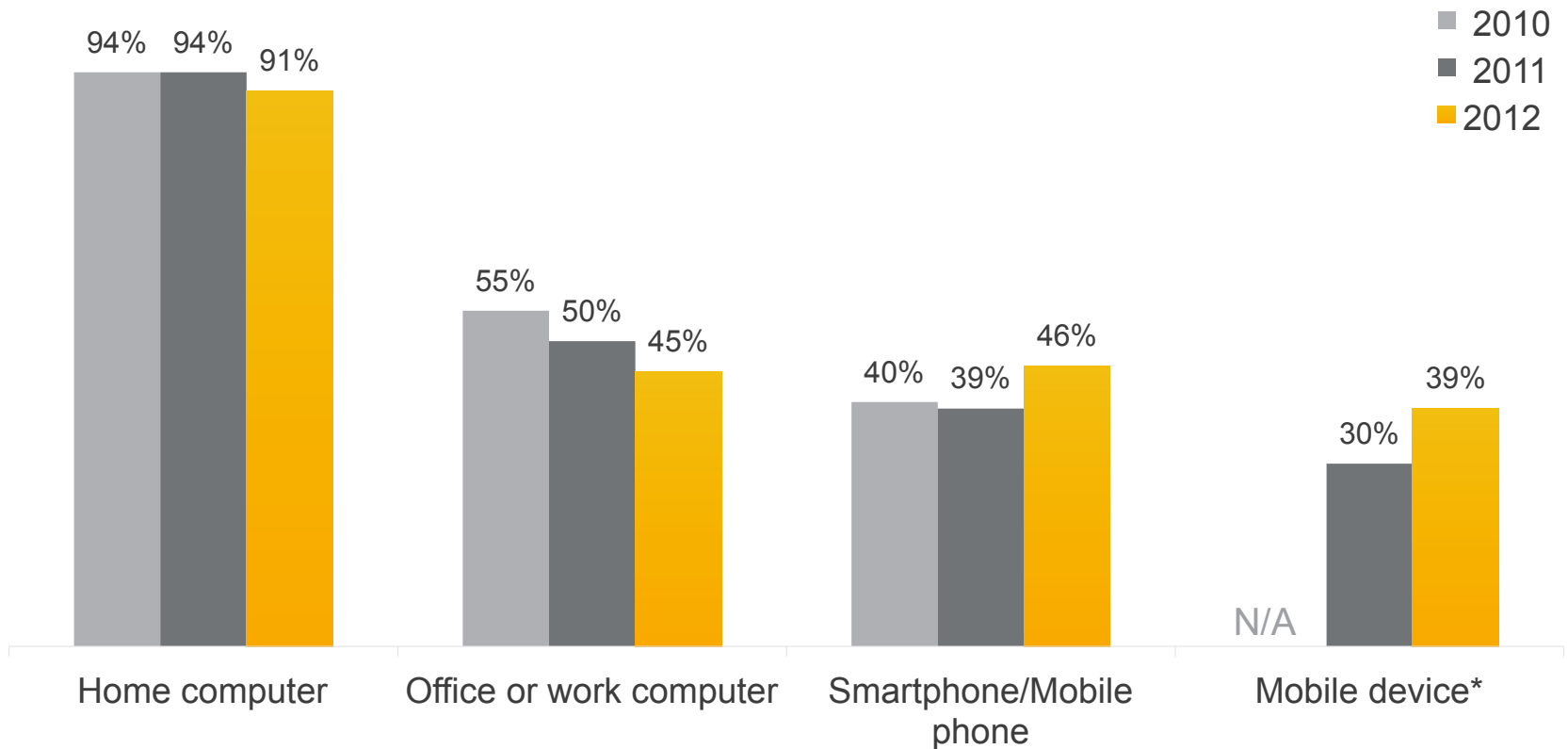
32% of travel apps downloads come from ad clicks

Where travel-related apps are downloaded

Category	Percentage
I looked in the app store	84%
Referred from friends	34%
Clicked on ads	32%
Other	10%

44%

of travelers have downloaded a travel related app
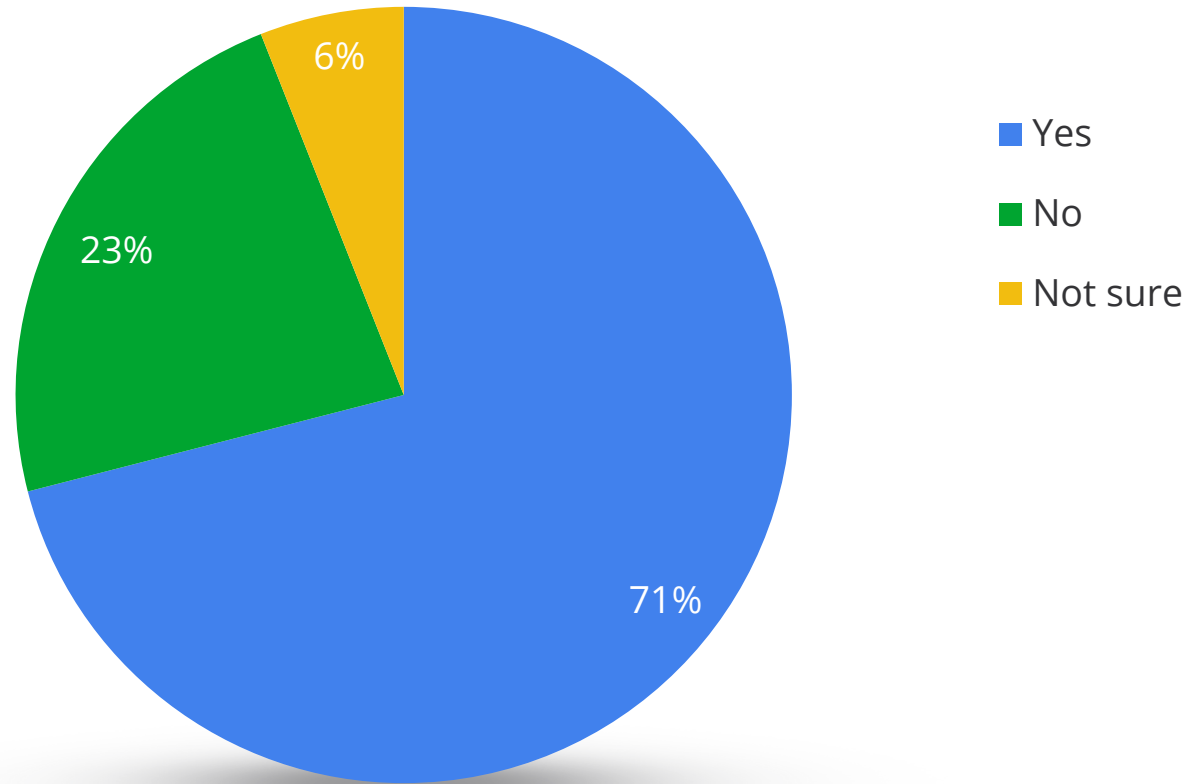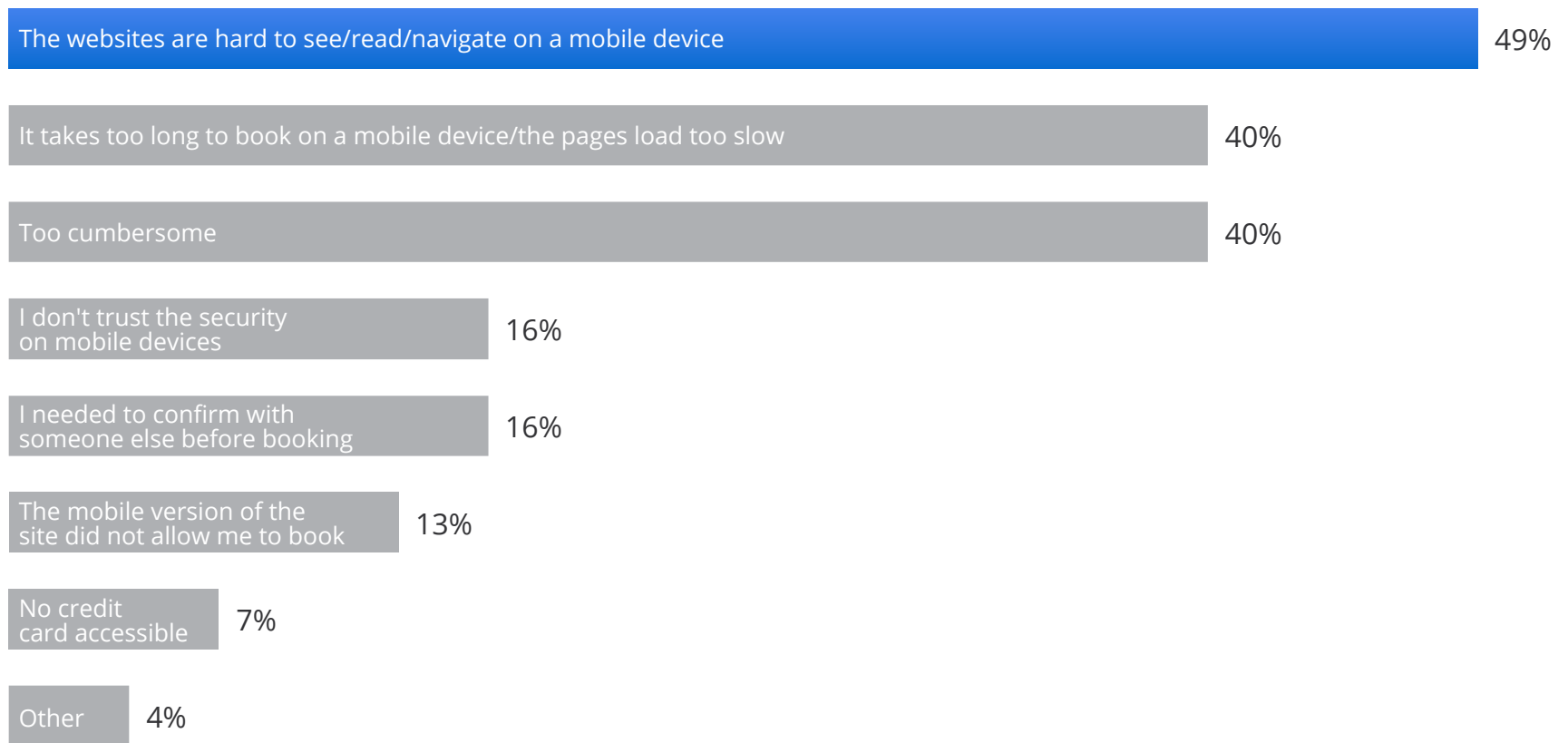
71% of affluent travelers have downloaded the app of the loyalty program to which they belong

Downloaded loyalty program app of loyalty program they belong to

6%

23%

71%

- Yes
- No
- Not sure

Q: Have you downloaded an app from a company with which you are a loyalty member in the past year? (n=434, downloaded an app in the last year and belong to a rewards program)

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A bad mobile website is the #1 deterrent to booking travel on a phone

Reasons for not booking on mobile device

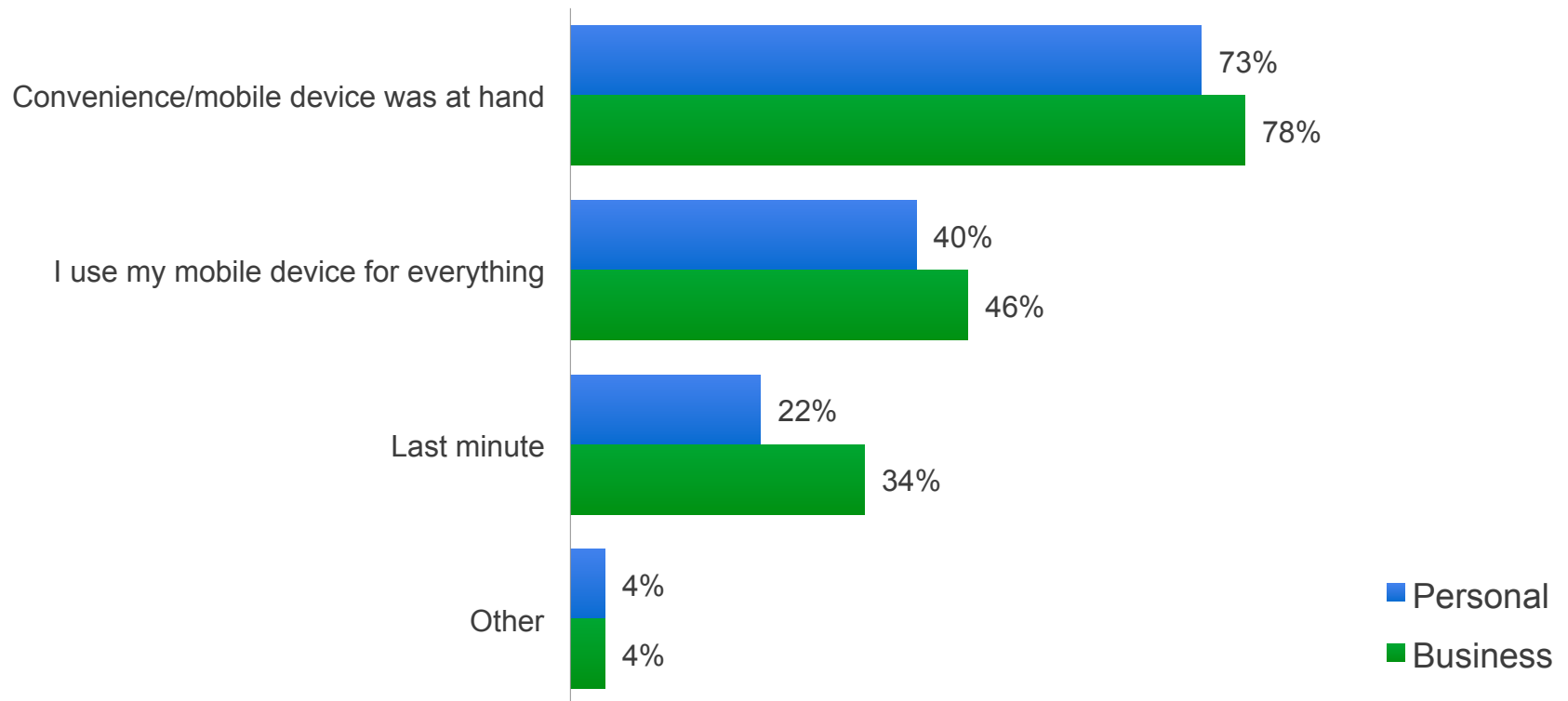|	
The websites are hard to see/read/navigate on a mobile device	49%
It takes too long to book on a mobile device/the pages load too slow	40%
Too cumbersome	40%
I don't trust the security on mobile devices	16%
I needed to confirm with someone else before booking	16%
The mobile version of the site did not allow me to book	13%
No credit card accessible	7%
Other	4%

When booking travel on a mobile device, travelers tend to book via mobile browser

How travelers use mobile to book travel

	Using apps		Using mobile browser	
	Leisure (377)	Business (354)	Leisure (377)	Business (354)
Overnight accommodations	12%	17%	**40%**	**36%**
Air travel	10%	17%	**38%**	**35%**
Car rental	7%	14%	**33%**	**33%**
Travel packages	6%	10%	**27%**	**26%**
Destinations	5%	7%	**13%**	**21%**
Vacation activities	5%	10%	**23%**	**26%**
Bus/Rail travel	4%	7%	**9%**	**16%**
Cruises	3%	7%	**15%**	**17%**

Business travelers rely on mobile to book, especially last minute travel

Reasons for booking on mobile

Convenience/mobile device was at hand
- 73%
- 78%

I use my mobile device for everything
- 40%
- 46%

Last minute
- 22%
- 34%

Other
- 4%
- 4%

Personal
Business

Source: Q: Why did you use your mobile device to book travel? (n= 500 personal, 425 leisure).
Base: Booked on mobile

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Business travelers book on mobile

Travelers who have reserved or booked on mobile

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Travel packages	14%	23%
Destinations	9%	18%
Car rental	17%	28%
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Bus/Rail travel	7%	15%