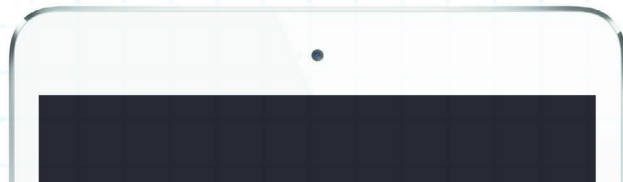
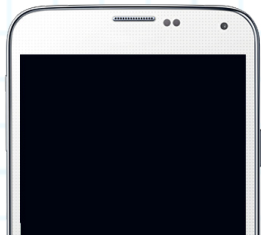
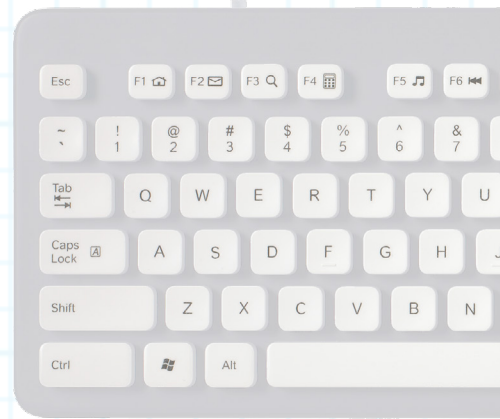


TRAVEL DECISIONS IN A MULTISCREEN WORLD

 **Expedia**
MediaSolutions

 **COMSCORE.**



METHODOLOGY OVERVIEW

As a follow up to the 2012 and 2013 US studies, Expedia commissioned comScore to conduct a study on the importance of multiplatform devices in online travel content consumption.

comScore blended online travel behavioral data with data collected through a custom survey.

Custom Survey Qualifications:

- Age 18+
- Live in the US
- Made an online purchase in last 6 months
- Own a smartphone or tablet
- Booked travel within the past 6 months
- Survey fielded from Aug 21-25, 2014

Behavioral Data Sources:

- comScore Multiplatform Panel
- comScore MobiLens Panel
- comScore TabLens Panel
- comScore Device Essentials' Tags
- comScore E-Commerce Panel
- comScore M-Commerce Panel
- comScore vCE Tags

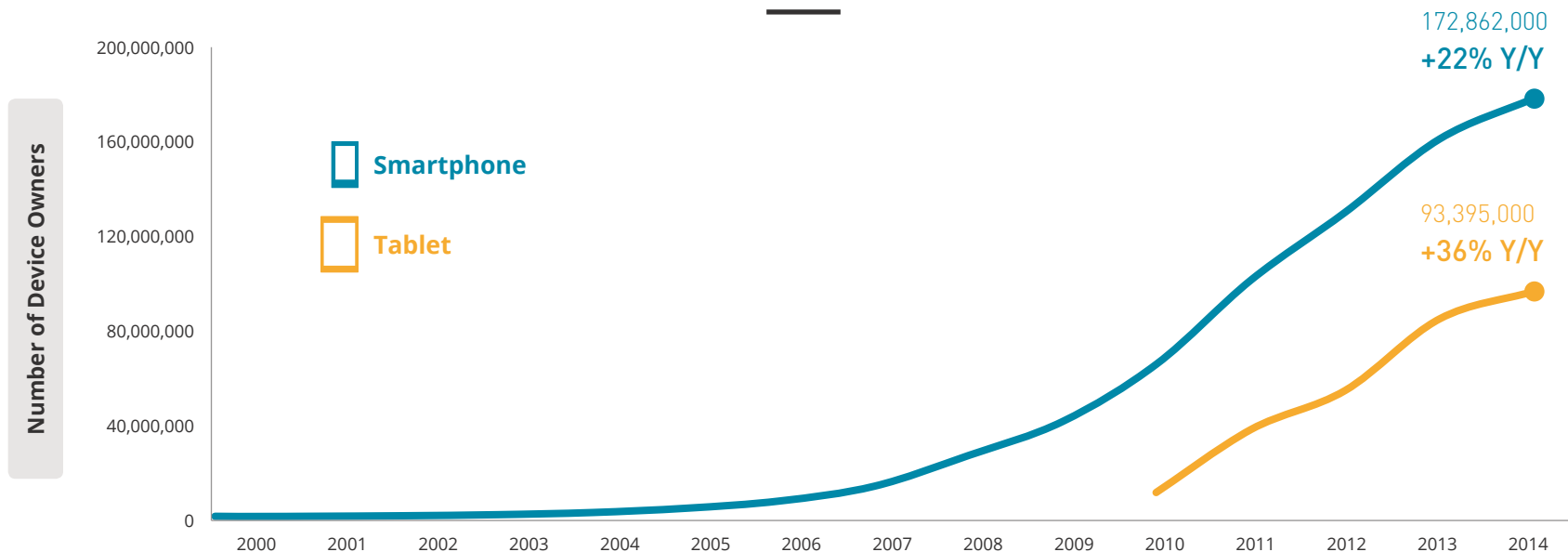
Statistical Reliability:

- A sample of 823 is reliable within $\pm 3.4\%$ points at 95% confidence interval
- A sample of 500 is reliable within $\pm 4.4\%$ points at 95% confidence interval

MOBILE CONSUMER BEHAVIORS

U.S. OWNERSHIP OF MOBILE DEVICES CONTINUES TO RISE; TABLET OWNERSHIP OUTPACING SMARTPHONE

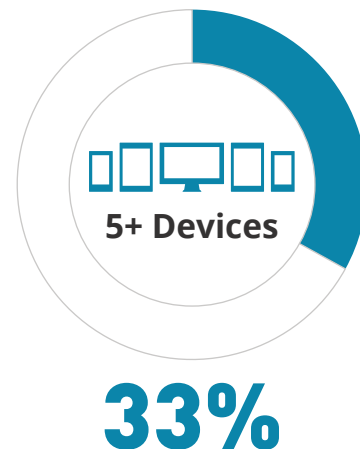
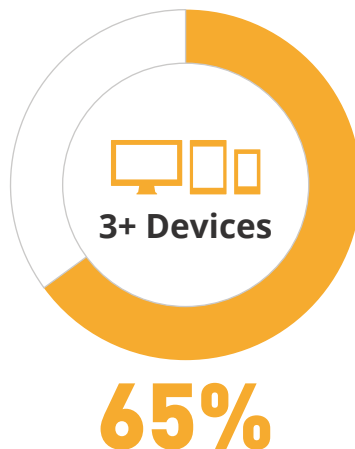
Total US Device Ownership: Smartphones and Tablets



CONSUMERS HAVE A BROAD RANGE OF DEVICE CHOICES IN THE HOUSEHOLD



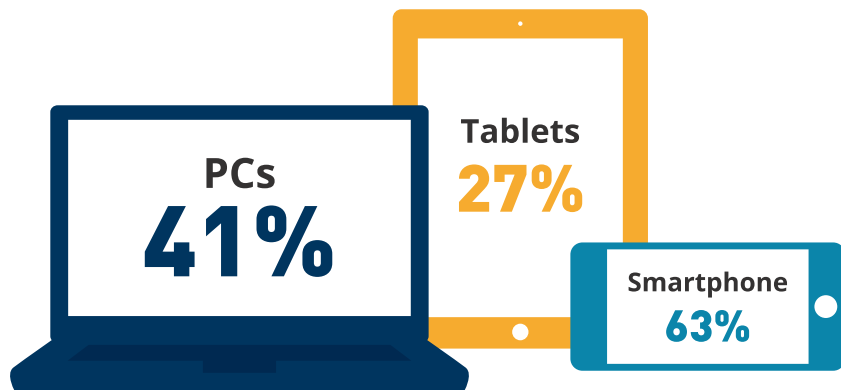
Devices Per US Household



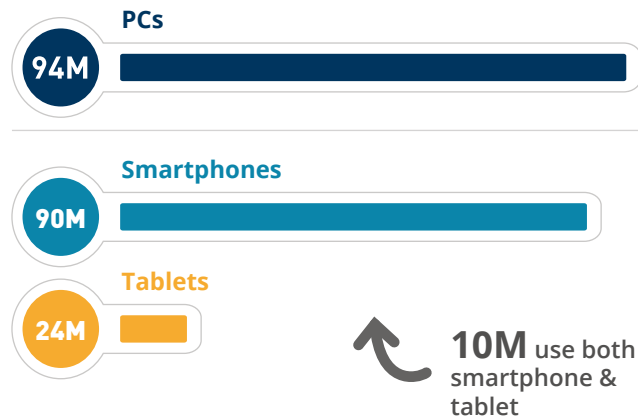
248M PEOPLE (+3% YOY) IN THE US ENGAGE WITH DIGITAL CONTENT

156M people (+11% y/y) specifically with travel content

Monthly Travel Visitors

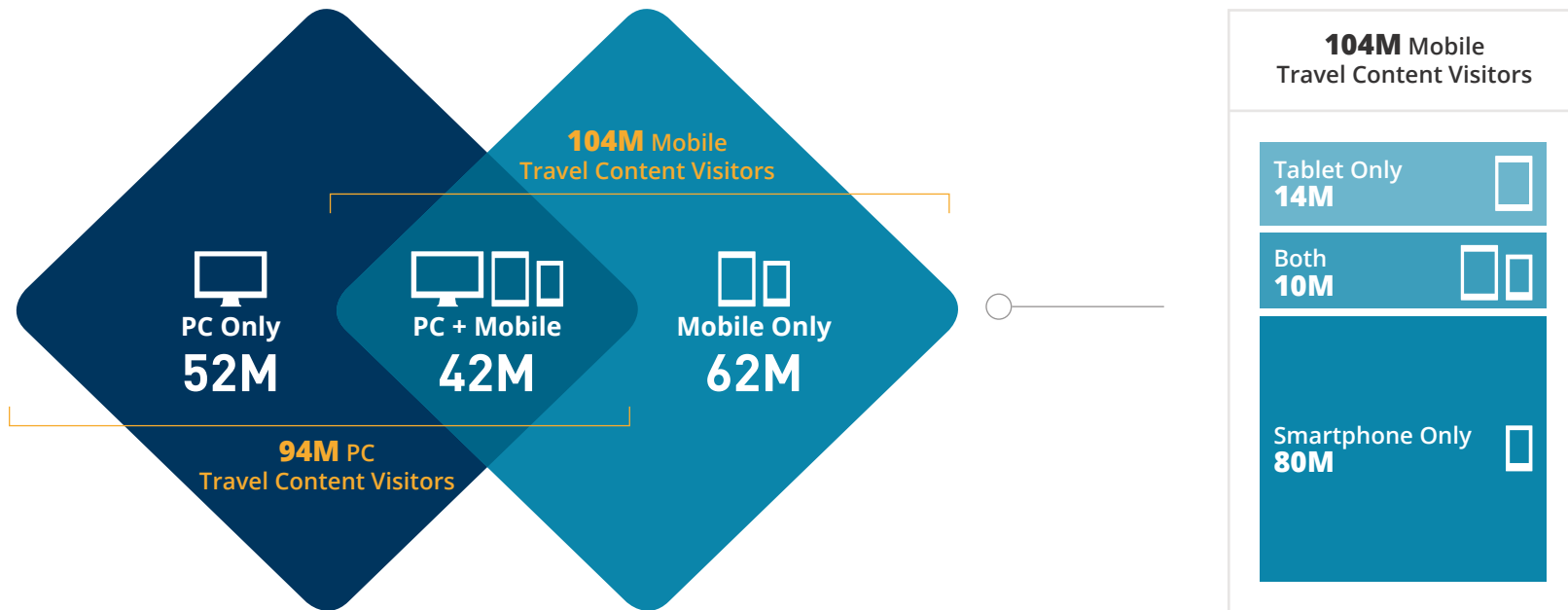


Online Travel Site Visits by Device



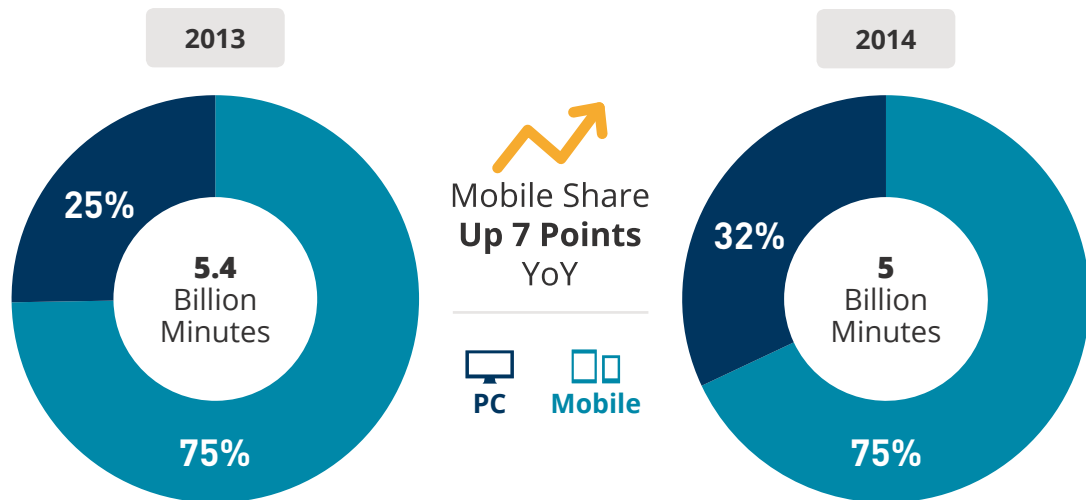


156M PEOPLE (+11% YOY) ENGAGE SPECIFICALLY WITH TRAVEL CONTENT

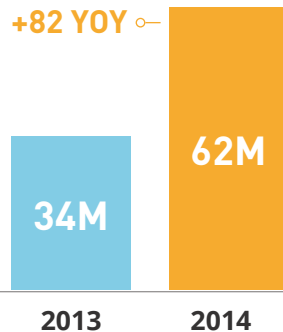


MOBILE IS CLOSING THE ENGAGEMENT GAP AS AN INCREASING SHARE OF MONTHLY TRAVEL VISITORS ARE MOBILE EXCLUSIVE

Device Share of Travel Minutes



Exclusive Mobile Travel UVs: Monthly



2014: 40% of Travel Audience is Mobile Only

PC USERS STILL SPEND TWICE AS MANY TOTAL MINUTES AS MOBILE USERS ON TRAVEL SITES, DUE TO HIGHER FREQUENCY AND ENGAGEMENT



Travel: **Visits Per Visitor**



PC

Mobile



Travel: **Minutes Per Visit**



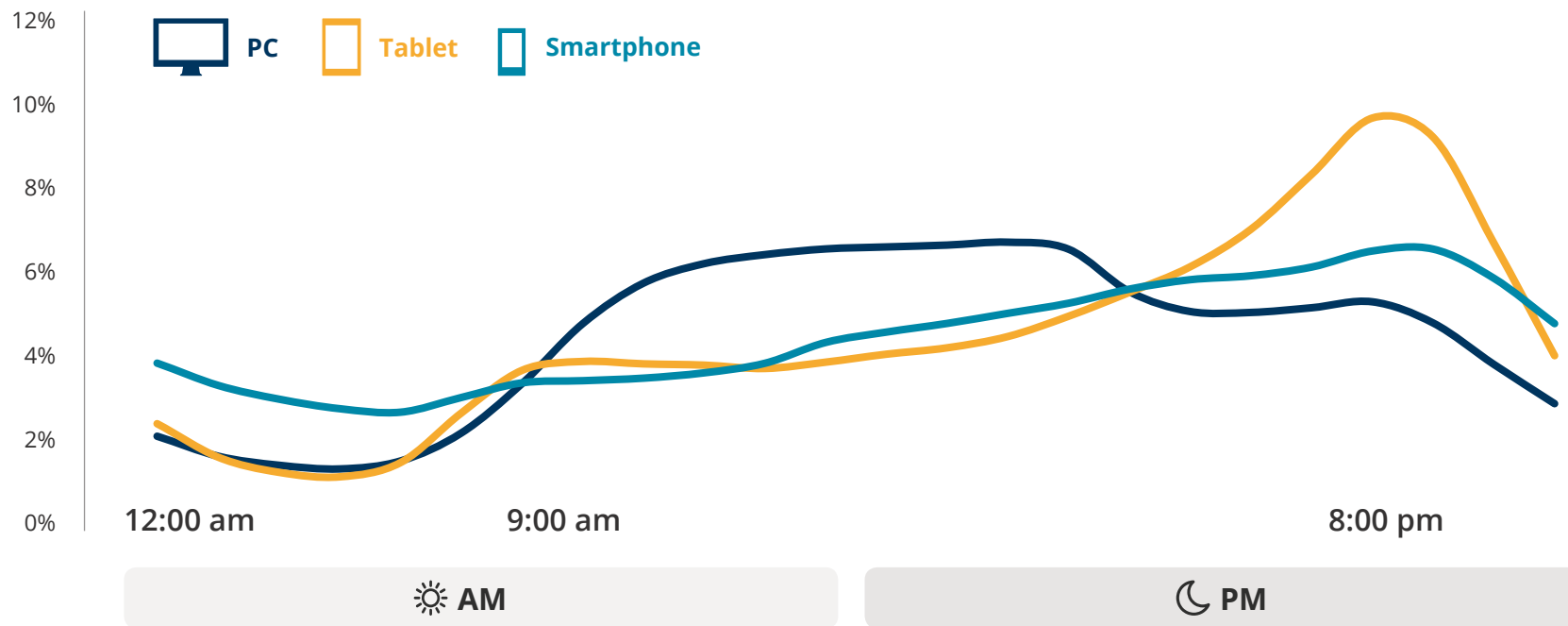
PC

Mobile

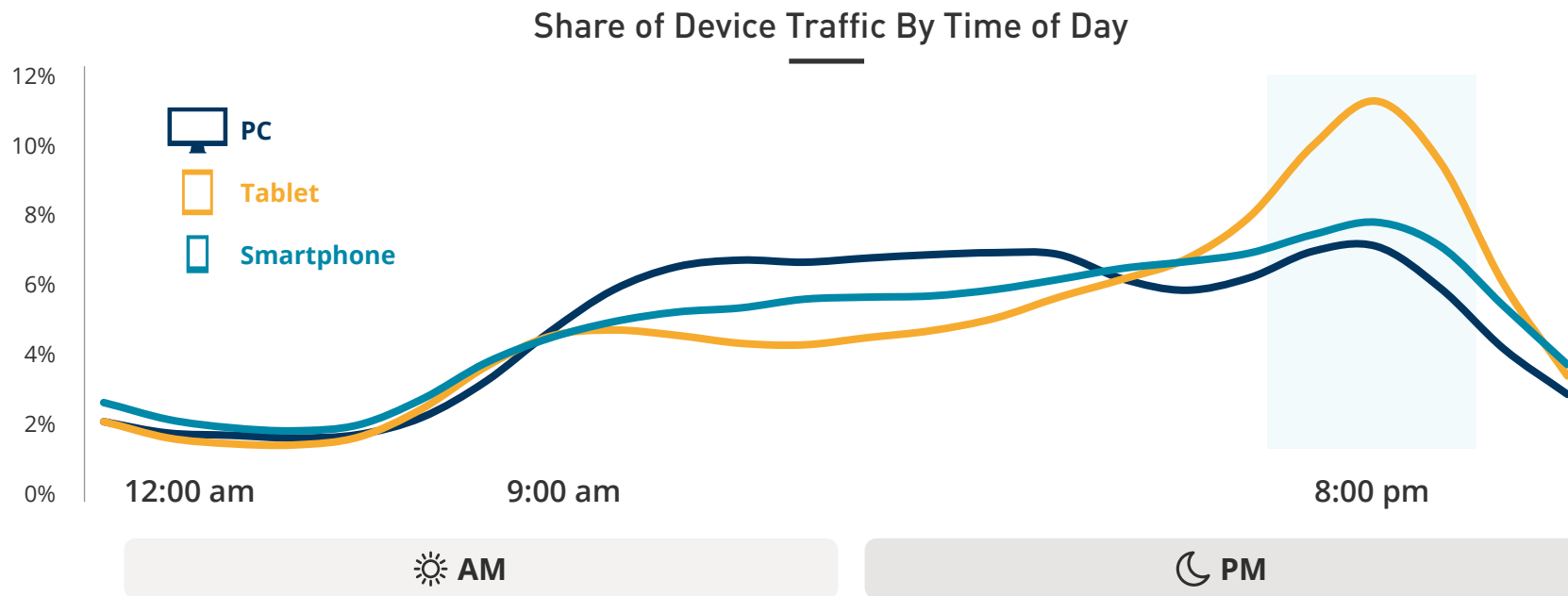
AUDIENCE GROWTH IS SURGING FOR SMARTPHONE & TABLETS ACROSS CATEGORIES



SHARE OF DEVICE TRAFFIC BY TIME OF DAY 2012 - TRAVEL

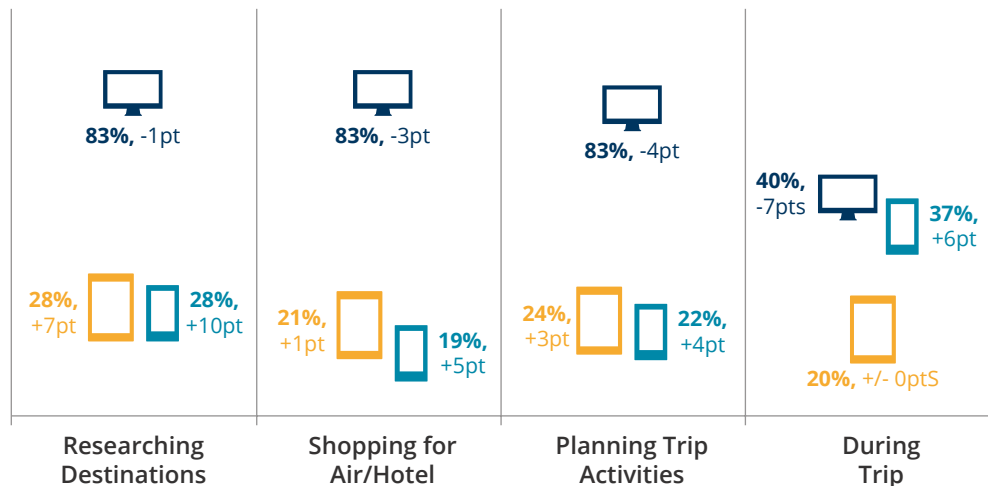


THE EVENING PEAK FOR TRAVEL BROWSING IS DRIVEN BY A LARGE SPIKE IN TABLET ACTIVITY – BUT PC AND SMARTPHONE PEAK AT 8PM AS WELL



MOBILE USAGE IN THE PLANNING STAGES HAS INCREASED SINCE 2013, THOUGH PC STILL DOMINATES

2014 Device Usage by Travel Stage



PCs



Dominates planning process and still widely used on-trip.

Tablet



Used consistently across stages.

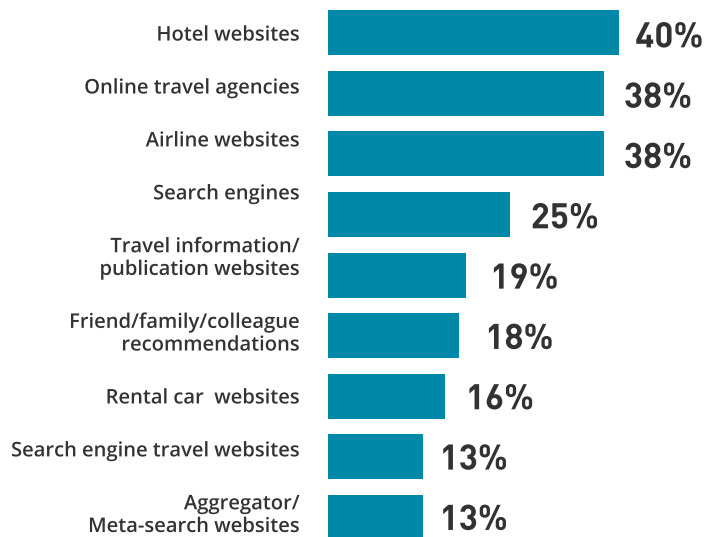
Smartphone



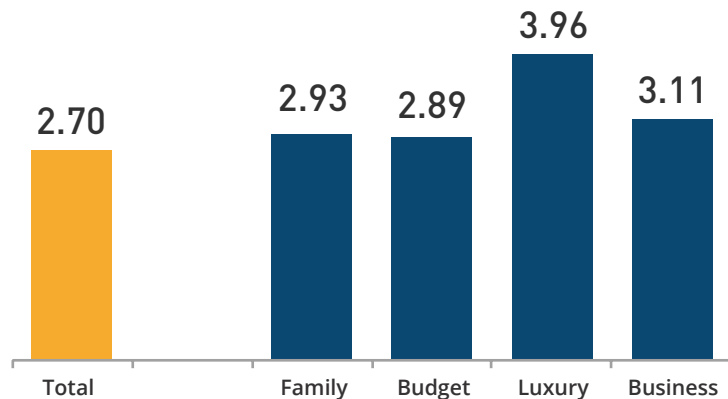
Most likely to be used during trip for travel related info than in other stages.

LUXURY TRAVELERS USE MORE RESOURCE CATEGORIES WHEN BOOKING THEIR TRIPS

Top Resource Categories used while booking last trip



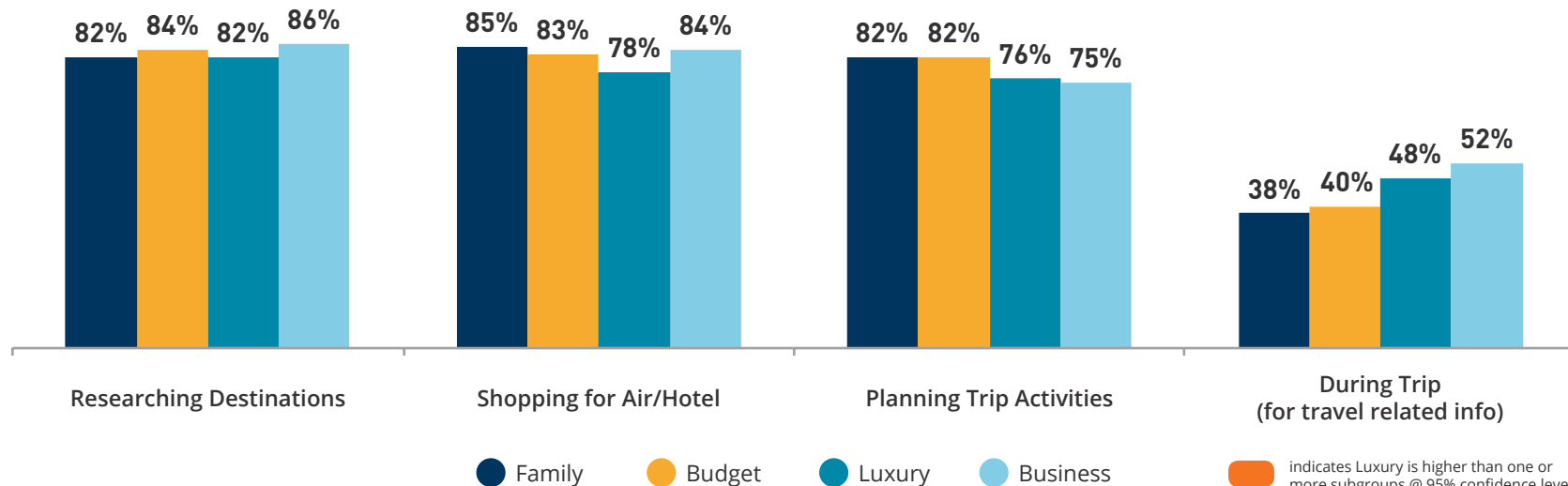
Average Number of Resource Categories used while booking last trip



PC USAGE REMAINS HIGH FOR ALL GROUPS IN THE PLANNING STAGES



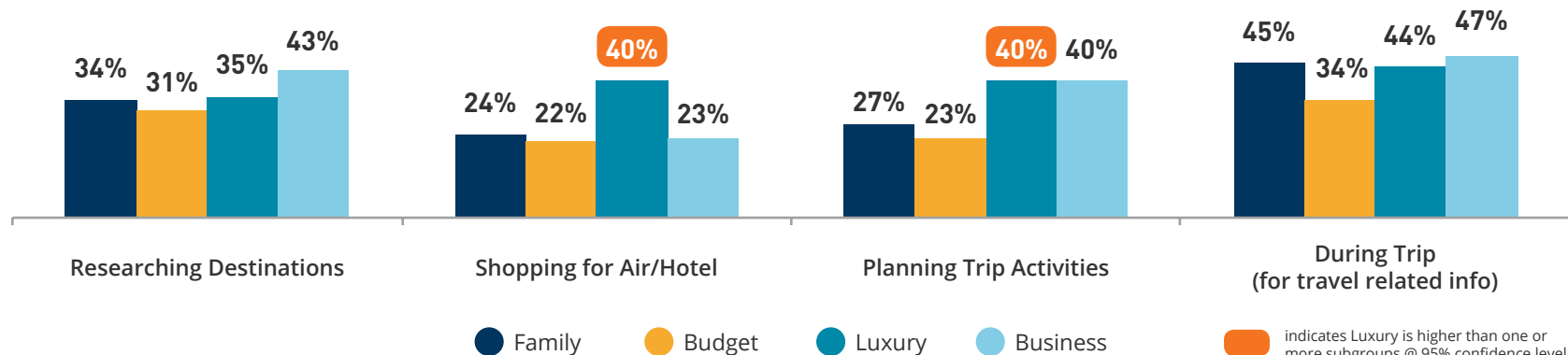
PC Usage by Trip Stage



LUXURY AND BUSINESS TRAVELERS USE THEIR SMARTPHONES TO ENGAGE WITH TRAVEL CONTENT PRE-TRIP MORE THAN OTHER SEGMENTS



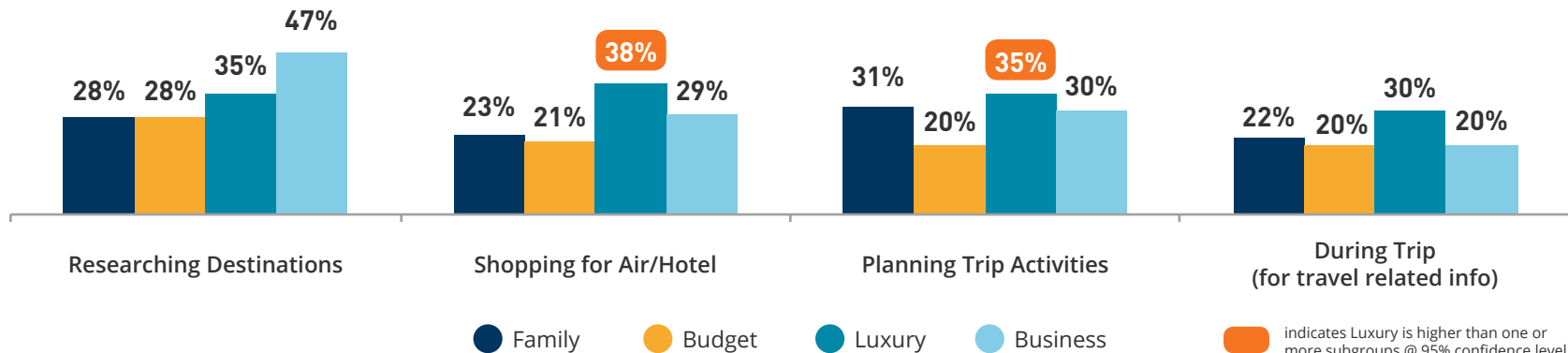
Smartphone Usage by Trip Stage



BUSINESS TRAVELERS TEND TO USE THEIR TABLETS MOST FOR RESEARCHING DESTINATIONS, LUXURY TRAVELERS ENGAGE MORE FOR SHOPPING AND PLANNING

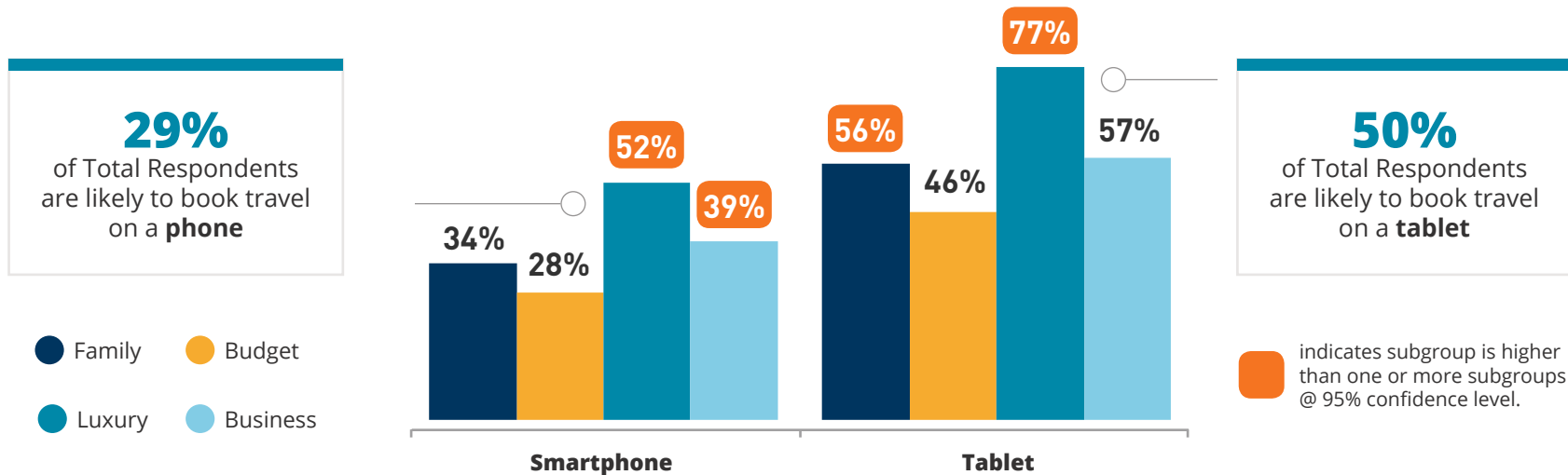


Tablet Usage by Trip Stage



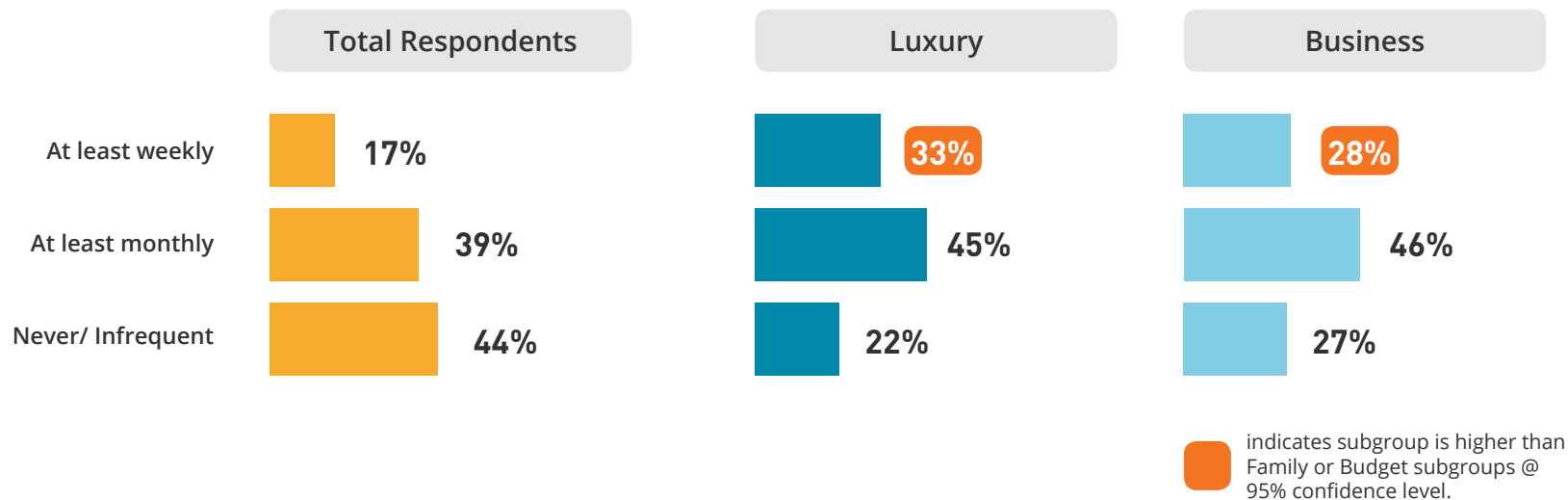
LUXURY TRAVELERS ARE MORE LIKELY TO BOOK TRAVEL ON A MOBILE DEVICE - BUSINESS TRAVELERS PLAN TO USE PHONES WHILE FAMILY TRAVELERS PLAN TO USE TABLETS

% Likely to Book Travel by Device
(In next 12 months, Top 2 Box)



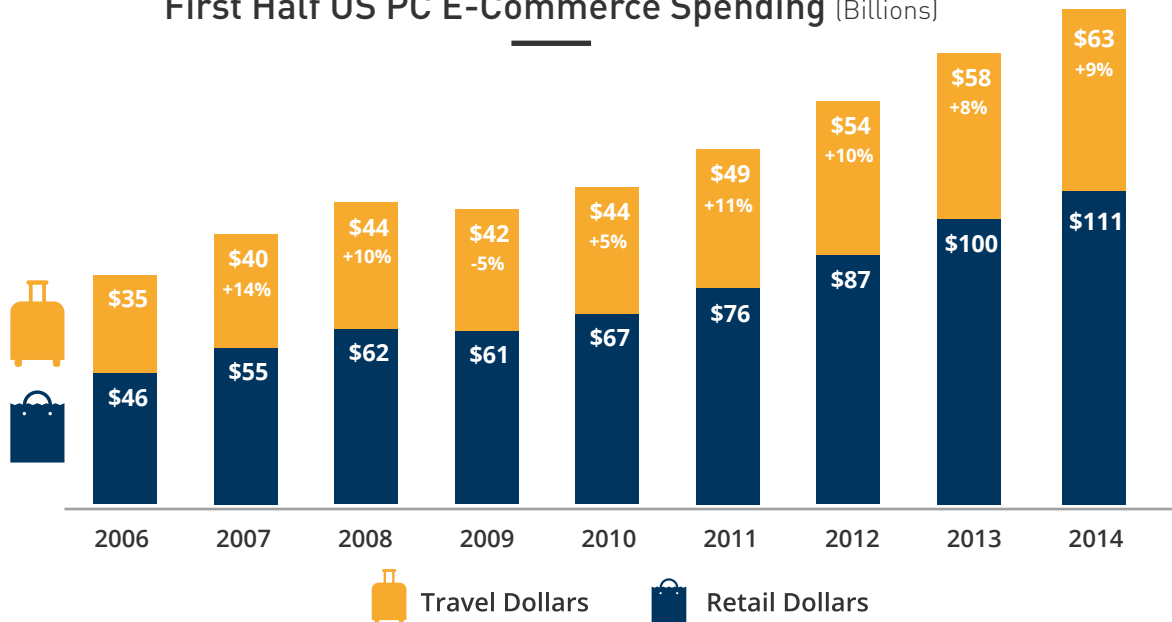
LUXURY AND BUSINESS TRAVELERS ARE AVID INTERNET USERS

Frequency of looking at travel sites for Fun



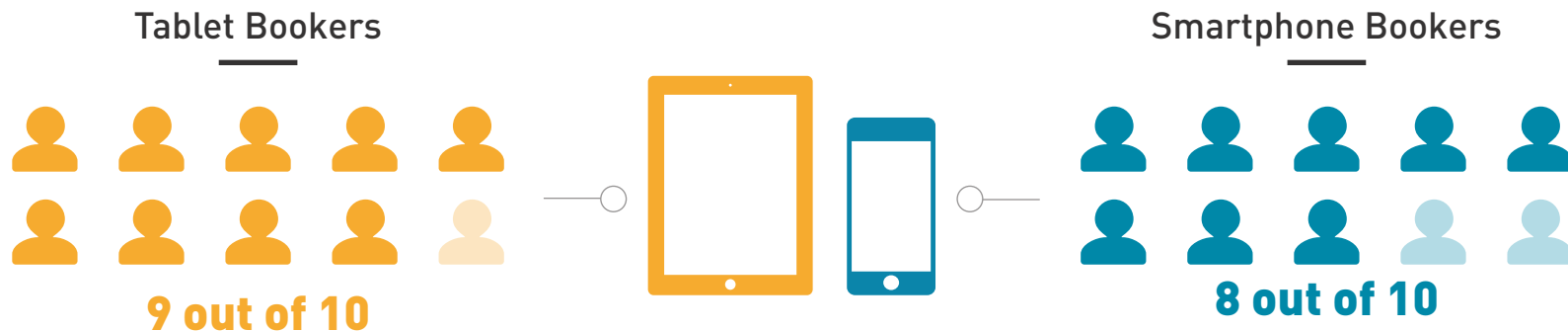
US PC ONLINE TRAVEL SPENDING WAS \$63 BILLION THROUGH THE FIRST HALF OF 2014, UP 9 % YEAR-OVER-YEAR

First Half US PC E-Commerce Spending (Billions)

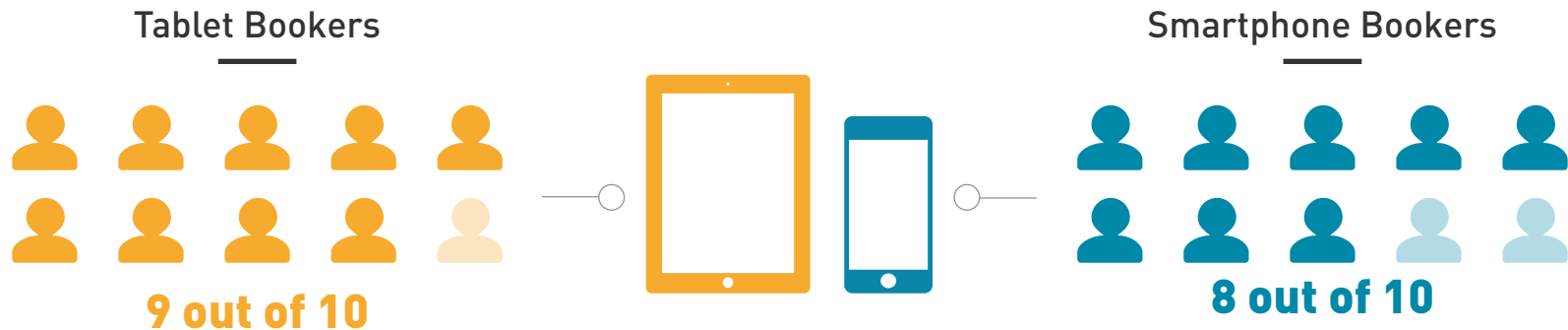


Travel accounted for **36%** of total e-commerce spending in H1 2014.

IN 2012, PEOPLE WHO BOOKED TRAVEL ON MOBILE REPORTED THEY WOULD BOOK ON THEIR DEVICE AGAIN IN THE FUTURE



IN 2014, MORE PEOPLE THAN EVER ENGAGED WITH TRAVEL ON MOBILE; THE MAJORITY WHO BOOKED ON THEIR DEVICE WOULD DO SO AGAIN



OF TRAVELERS IN THE PAST 6 MONTHS



29%
booked on
a Tablet

21%
booked on a
Smartphone

IN THE NEXT 12 MONTHS

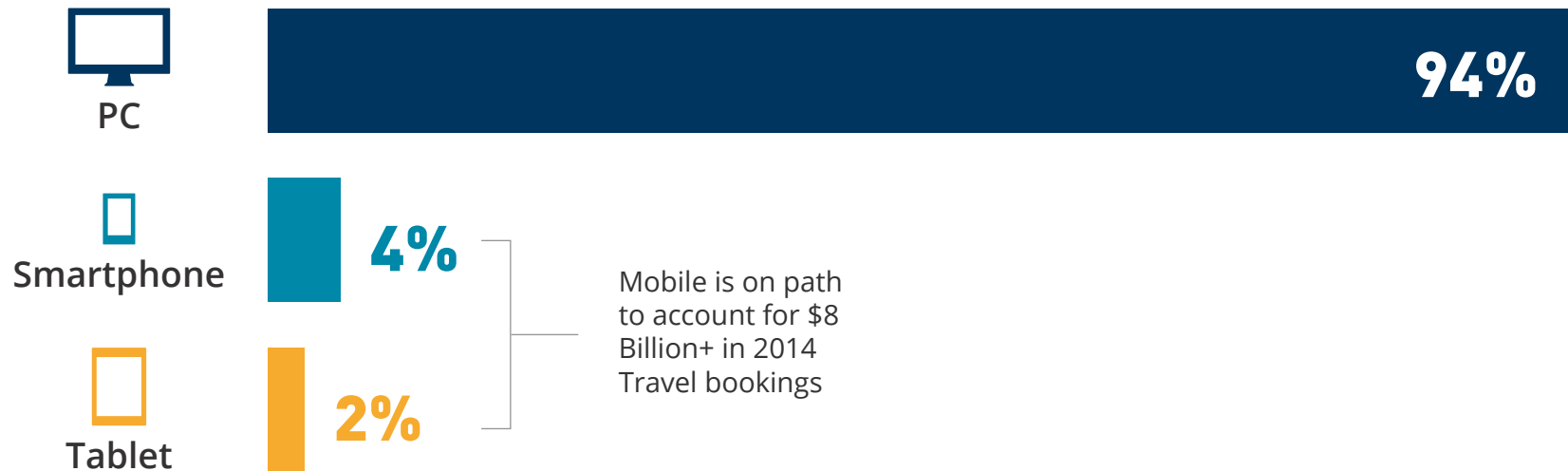


The infographic features two central devices: a large orange tablet on the left and a smaller blue smartphone on the right. The tablet's screen displays '50% will book with a Tablet' in orange and black text. The smartphone's screen displays '29% will book with a Smartphone' in blue and black text. The background is a light gray illustration of an airport scene with a control tower, terminal buildings, and two airplanes in flight.

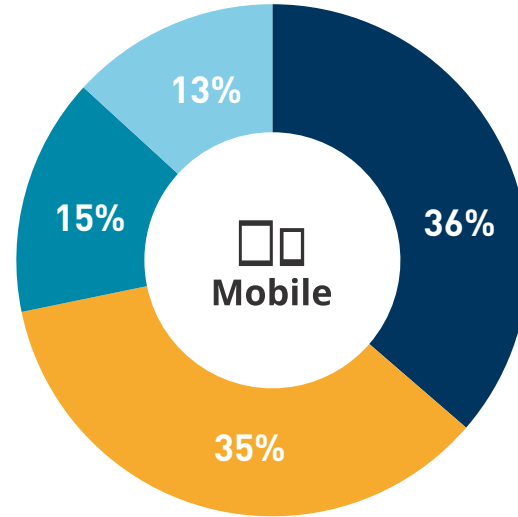
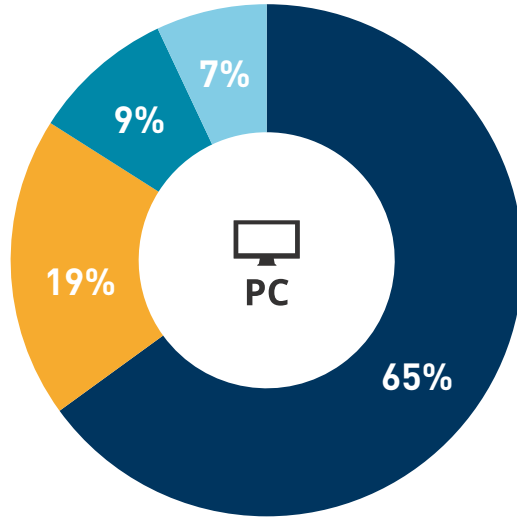
50%
will book with
a Tablet

29%
will book
with a
Smartphone

6% OF TOTAL ONLINE TRAVEL SPENDING CAME VIA MOBILE DEVICES, WITH SMARTPHONES ACCOUNTING FOR TWICE AS MANY DOLLARS AS TABLETS



MOBILE BOOKINGS SPAN ALL LINES OF TRAVEL



Air



Hotel



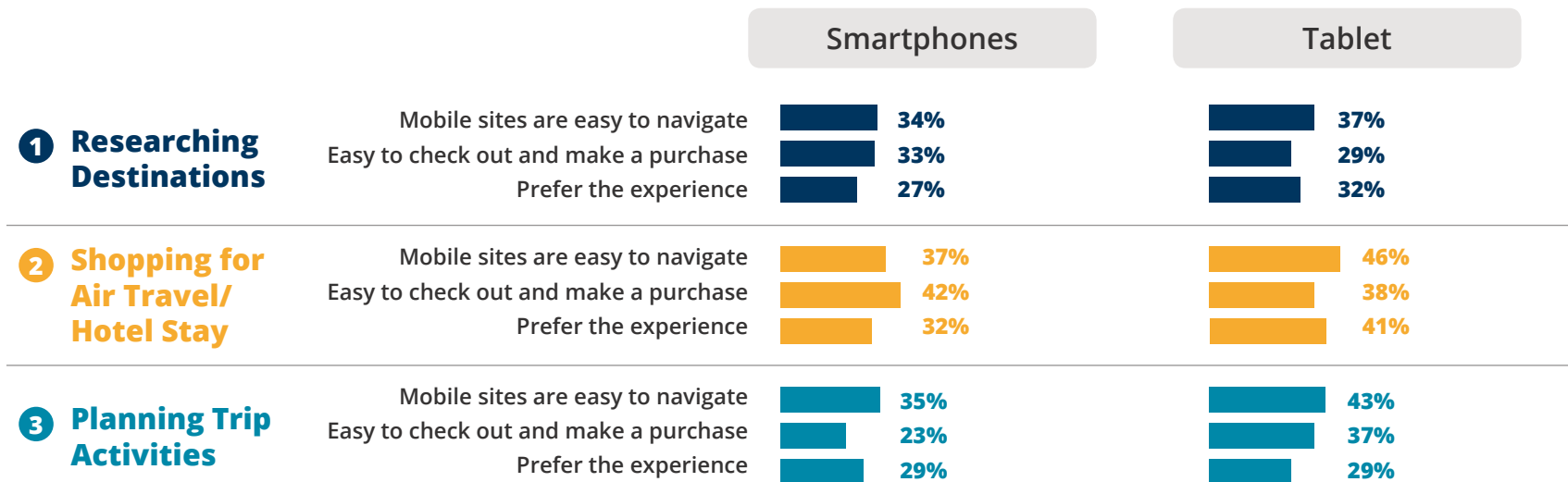
Car



All Other

SHOPPING FOR AIR AND HOTEL IS THE EASIEST STAGE FOR MOBILE CONSUMERS, BUT ROOM FOR GROWTH IN ALL TRAVEL STAGES

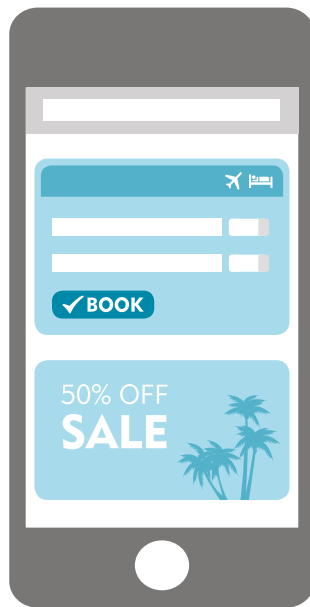
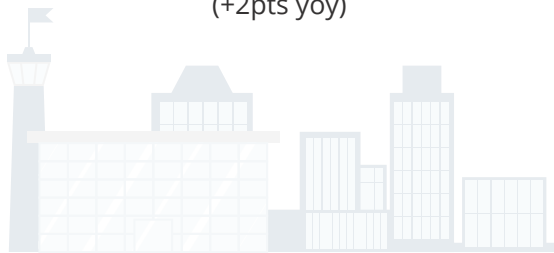
Why Devices are Used for Each Research Stage



BROWSERS CONTINUE TO DOMINATE APPS FOR MOBILE TRAVEL CATEGORY CONSUMPTION

Of the
104 Million people
engaging with travel content on
a mobile device, **92% are using a
mobile browser** to do so

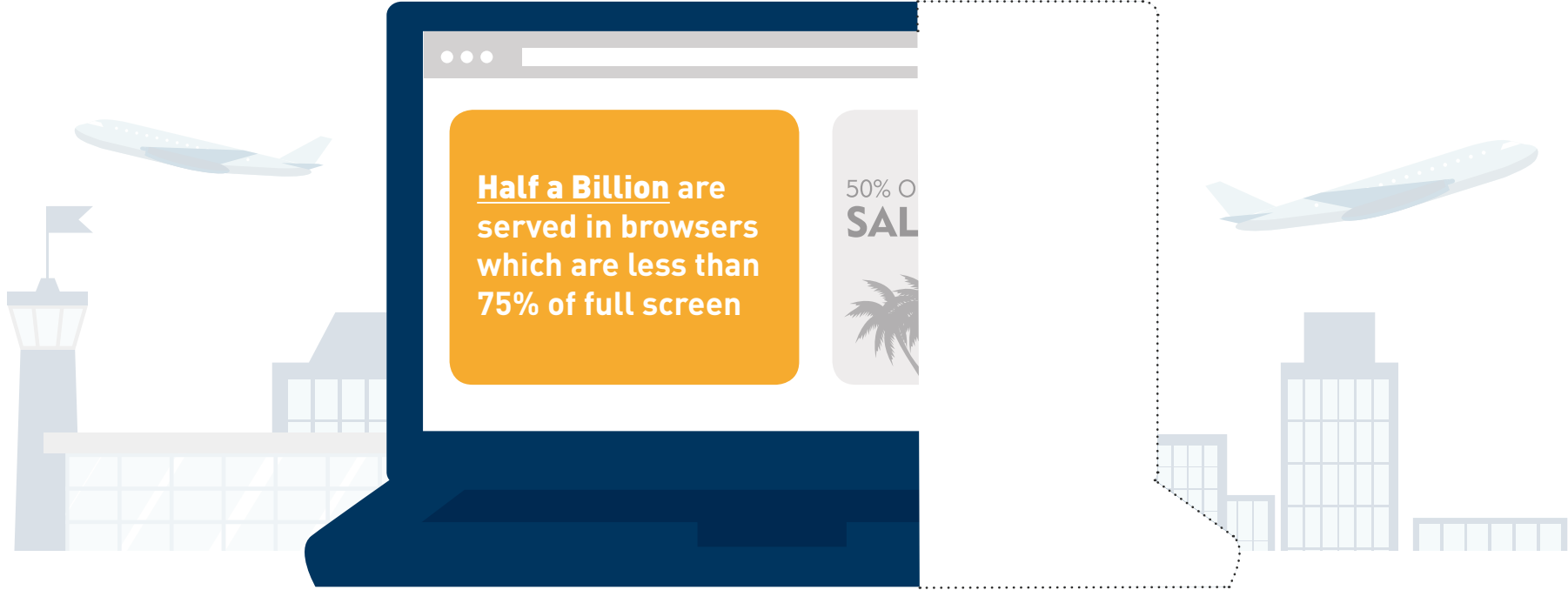
(+2pts yoy)



85%
of all people engaging with travel
content via a **mobile browser** do so
via a **smartphone**

(+1pts yoy)

OF ALL TRAVEL ADS SERVED EACH MONTH ON PC...



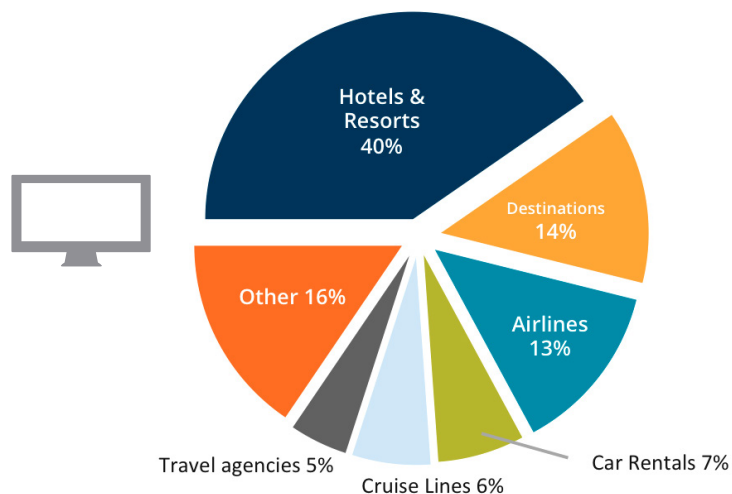
Half a Billion are
served in browsers
which are less than
75% of full screen

50% OFF
SALE

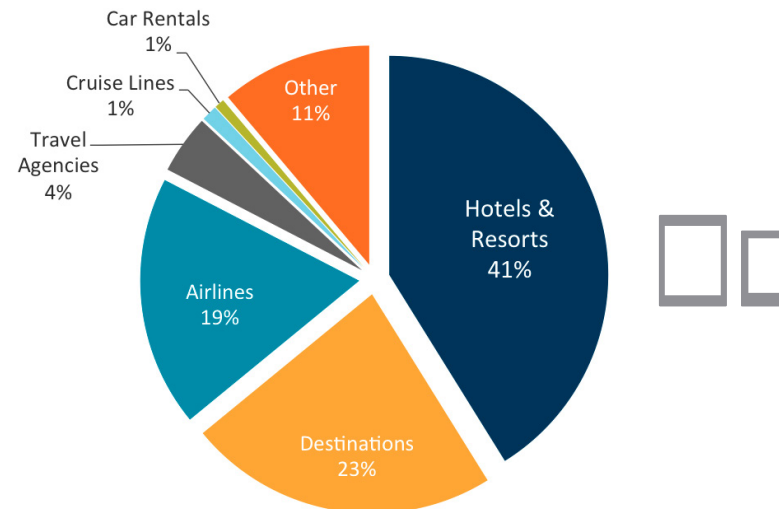


HOTEL & RESORT BRANDS ACCOUNT FOR BY FAR THE MOST TRAVEL IMPRESSIONS ACROSS PLATFORMS; FOLLOWED BY DESTINATIONS

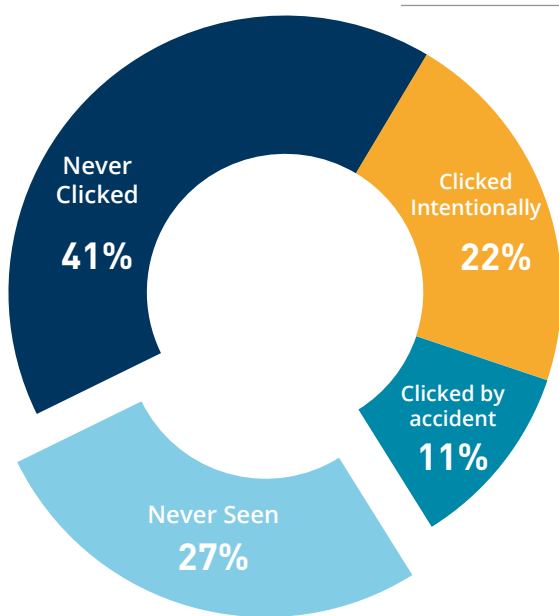
Travel Advertising Composition – PC



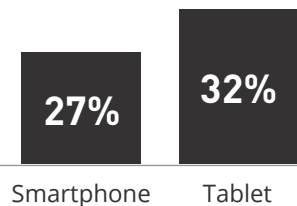
Travel Advertising Composition – Mobile



TRAVELERS EXPOSED TO ADS ON MOBILE ARE MORE LIKELY TO CLICK ON A TABLET AD THAN A SMARTPHONE AD



Of those with the opportunity to click on a mobile ad...

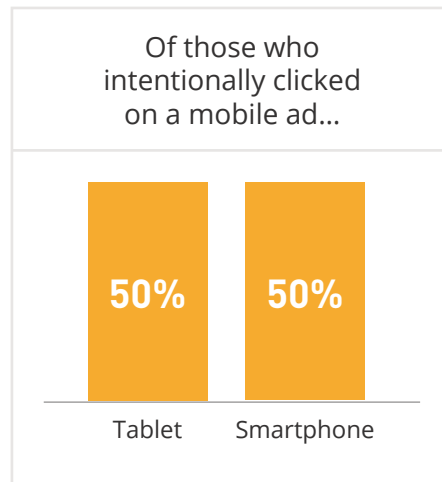
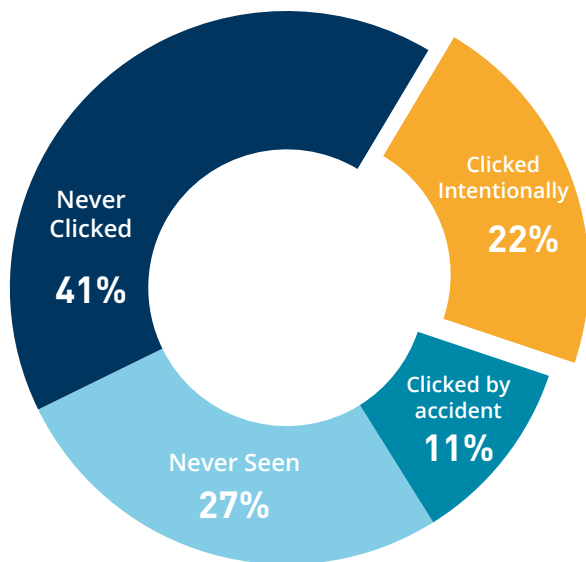


MOBADCONSUME. Please let us know how you have interacted with advertisements on each device. Base: Smartphone = 718, Tablet = 551

PHONEADBENS. Thinking of the last time you clicked on an ad on your smartphone, what was it about advertisements on this device that persuaded you to click on them? Is it because the ad on your smartphone... Base: Respondents who intentionally clicked on an ad on Smartphone = 144

TABADBENS. Thinking of the last time you clicked on an ad on your tablet, what was it about advertisements on this device that persuaded you to click on them? Is it because the ad on your tablet... Base: Respondents who intentionally clicked on an ad on Tablet = 152

TRAVELERS INTENTIONALLY ENGAGING WITH ADS ON MOBILE ARE EQUALLY LIKE TO CLICK ON A TABLET AD OR SMARTPHONE AD



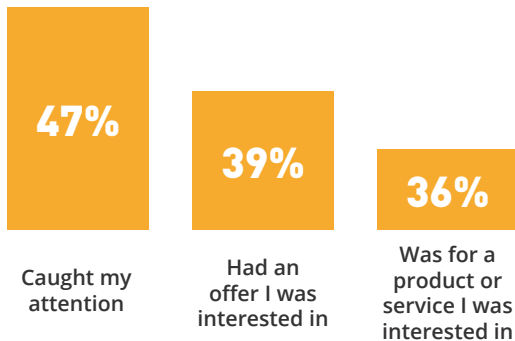
MOBADCONSUME. Please let us know how you have interacted with advertisements on each device. Base: Smartphone = 718, Tablet = 551

PHONEADBENS. Thinking of the last time you clicked on an ad on your smartphone, what was it about advertisements on this device that persuaded you to click on them? Is it because the ad on your smartphone... Base: Respondents who intentionally clicked on an ad on Smartphone = 144

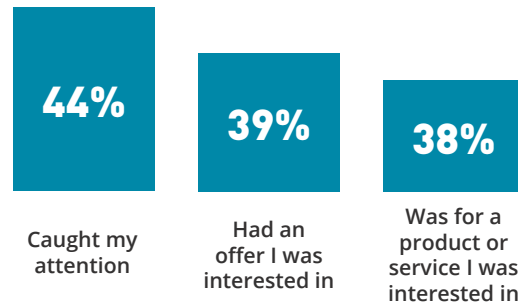
TABADBENS. Thinking of the last time you clicked on an ad on your tablet, what was it about advertisements on this device that persuaded you to click on them? Is it because the ad on your tablet... Base: Respondents who intentionally clicked on an ad on Tablet = 152

TOP REASONS FOR CLICKING ON ADS ARE THE SAME BY DEVICE

Top 3 Reasons for Tablet



Top 3 Reasons for Smartphone



MOBADCONSUME. Please let us know how you have interacted with advertisements on each device. Base: Smartphone = 718, Tablet = 551

PHONEADBENS. Thinking of the last time you clicked on an ad on your smartphone, what was it about advertisements on this device that persuaded you to click on them? Is it because the ad on your smartphone... Base: Respondents who intentionally clicked on an ad on Smartphone = 144

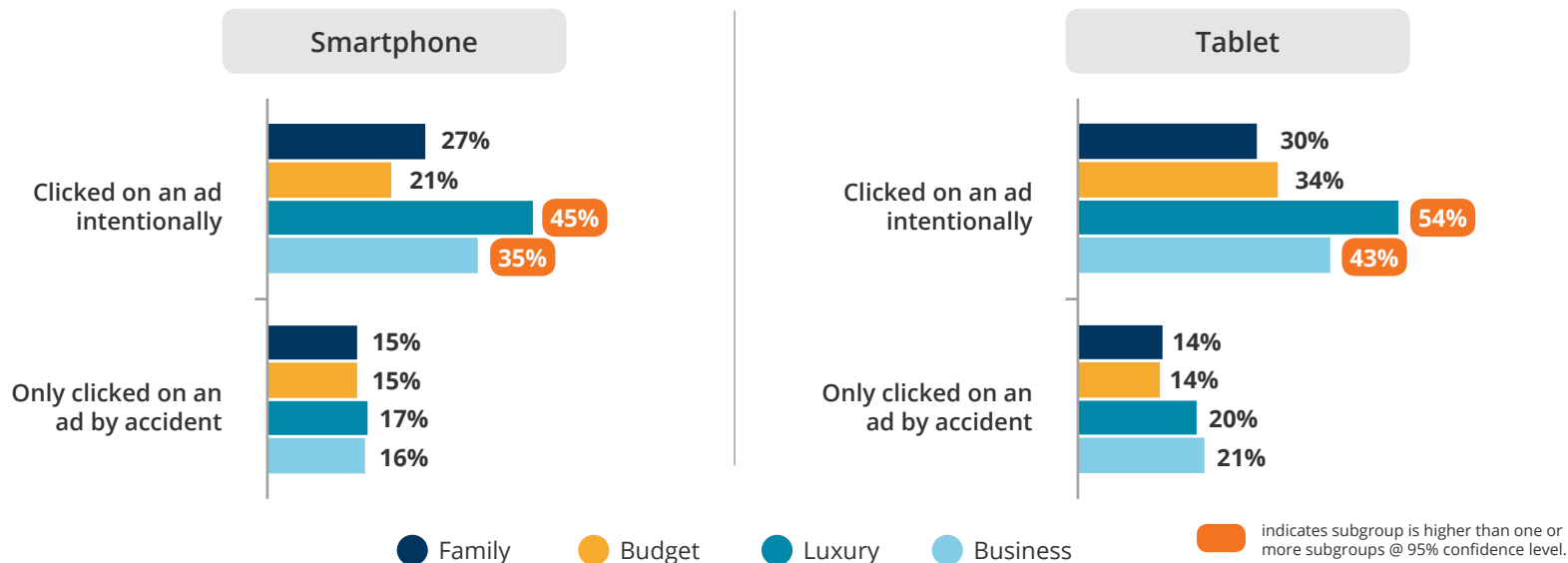
TABADBENS. Thinking of the last time you clicked on an ad on your tablet, what was it about advertisements on this device that persuaded you to click on them? Is it because the ad on your tablet... Base:

Respondents who intentionally clicked on an ad on Tablet = 152

*Does not contain 'I've never seen an ad on this device'

BUSINESS AND LUXURY TRAVELERS ARE MORE LIKELY TO INTENTIONALLY CLICK ON MOBILE ADS THAN OTHER GROUPS, REGARDLESS OF DEVICE

Interacted with Advertisements by Traveler Segment



KEY FINDINGS

- ▶ Mobile device ownership continues to grow steadily – TODAY the mobile travel audience is BIGGER than the PC travel audience with engagement on mobile spanning all travel stages and categories of content
- ▶ While mobile bookings are at 6% of the market, over 70% of travelers are engaging with content via their mobile device on a monthly basis
- ▶ Mobile bookings will continue to grow – most who have booked on mobile will again, many who have yet to book on mobile intend to in the future
- ▶ Those who aren't booking, are looking and you need to be where they are
- ▶ On PC not all impressions are equal – Half a billion each month are served in browser windows $\frac{3}{4}$ or less of screen size therefore you need a mobile strategy to reach all consumers
- ▶ Consumer experience on mobile across stages has room to grow, ad relevancy and grabbing attention are key to driving mobile ad clicking

LEARN MORE AT

advertising.expedia.com