

The State of Mobile Booking 2015

SKIFT REPORT #29

2014

How do top executives and mobile gurus in travel view the dramatic shift toward mobile that's under way and what does it mean for lookers, bookers and the bottom line? This Skift Trends Report traces some of the seminal shifts of 2014, from the dramatic rise in mobile bookings to same-day hotel-booking trends and marketing trends that impact mobile development.

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Executive summary

How do top executives and mobile gurus in travel view the dramatic shift toward mobile that's under way and what does it mean for lookers, bookers and the bottom line? This Skift Trends Report traces some of the seminal shifts of 2014, from the dramatic rise in mobile bookings to same-day hotel-booking trends and marketing trends that impact mobile development.

What's clear from the findings of global research and executives detailing trends in their businesses is that the State of Mobile Booking 2015 depends on where you are sitting in that what may work for some U.S. businesses may be close to irrelevant for the consumer experience in India, China, Brazil or Germany.

This report features extensive Q&As with the respective mobile leads at Expedia.com and TripAdvisor who talk about topics ranging from app development and mobile payments to push notifications and conversion trends. There are also consumer surveys and sections highlighting the latest global trends in mobile.

Introduction

For the past several years travelers have been juggling their trip-planning, maneuvering from device to device while perusing a potential vacation on the train and continuing when arriving in the office, taking a lunch break or reaching for a tablet back at home on the couch. And that continues. But in 2014 a seminal shift began to take shape in the U.S. as bookings on desktops trended downward for the first time in a non-recessionary period while mobile travel bookings were off the charts.

Specifically, in the U.S., although the desktop is far from a legacy platform and still dominates travel bookings, eMarketer forecasts¹ that desktop travel sales for leisure and unmanaged business travel will dip 0.8% to \$119 billion in 2014, the first such decline since 2009. While the reduction in U.S. travel bookings on desktops is relatively small, the trends are clear. Mobile travel sales in the U.S. are forecast to jump 60% in 2014 to \$26.14 billion.

To get a feel for mobile booking trends you just have to listen to Orbitz Worldwide CEO Barney Harford who said recently² that the company “already sees the desktop as a legacy platform.”

“In four years’ time, we won’t even be thinking about desktops,” Harford said, adding that about one third of Orbitz Worldwide’s hotel bookings take place through mobile devices and roughly 25% throughout the entire product mix.

Harford’s reference to the desktop as a legacy platform, though, highlights the limits of making generalizations about the current status and future outlook of mobile bookings in travel because of the global and diverse nature of the travel industry. In markets from China to Brazil and India, travel companies don’t have to be too concerned about the desktop as a legacy platform because travelers there to a great extent skipped the desktop altogether and already do most of their travel planning and bookings on smartphones.

Many of the large, global travel companies share their latest numbers on mobile traffic and bookings trends. For example, Expedia Inc. CEO

Dara Khosrowshahi mentioned during the company's third quarter of 2014 earnings call³ that in previous quarters the company has pointed to around 20% of room night bookings taking place on mobile devices across the company's various global brands, but he added that mobile bookings are trending upward.

"In previous calls, we talked about mobile being, I'd say around 20% of room nights across our various brands," Khosrowshahi said. "And that share continues to grow as our mobile channels, I'd say, across the board, are growing faster than our desktop channels. And that's both in terms of traffic and in terms of room nights as well."

And on the traffic front, TripAdvisor CEO Stephen Kaufer said during the company's third quarter earnings call⁴ that "nearly 50% of users visited TripAdvisor via tablet and phone, and we're continuing to see industry-leading uptake and engagement on mobile devices."

But beyond mobile traffic and the number of transactions, China's Qunar notches nearly 40% of its revenue from mobile bookings, said chief strategy officer Yilu Zhao.⁵ The pace of Qunar's mobile revenue is growing "six times" year-over-year, Zhao added.

In a signal that mobile bookings are tilting toward the day when they might reflect today's desktop patterns, Harford of Orbitz said that although about half of the company's hotel bookings on mobile are same-day or prior day, booking windows are starting to get longer. In China, Qunar's Zhao is seeing a similar trend as she said booking windows on mobile are "normalizing." Longer booking windows would likely be a positive sign for online travel agencies as last-minute bookings tend to come with fewer days booked than bookings taking place further in advance.

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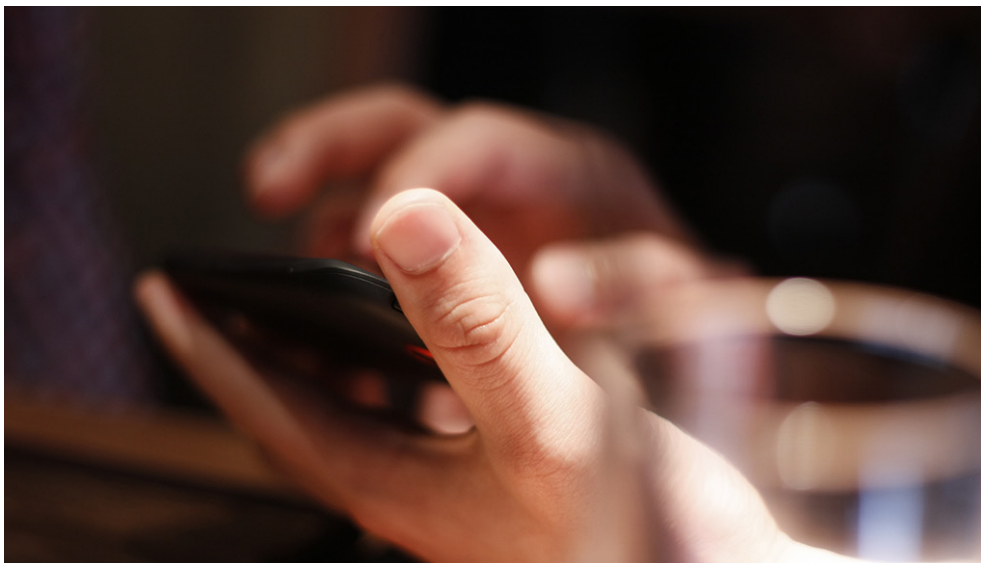
About Skift

Skift is a travel intelligence company that offers news, data, and services to professionals in travel and professional travelers, to help them make smart decisions about travel.

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Behind the trend

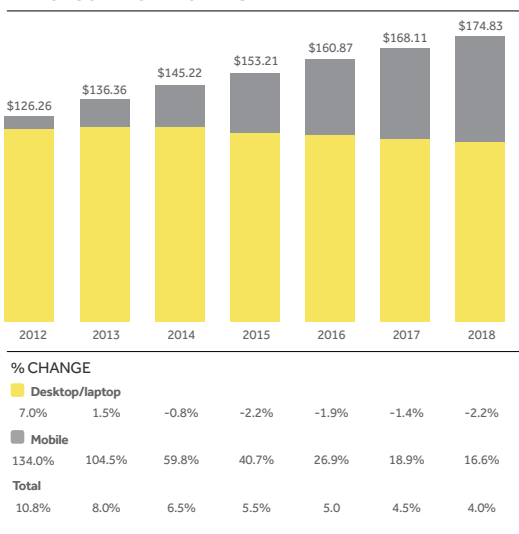


Source: Graeme Paterson/[Flickr](#)

The Desktop Tipping Point

In the U.S., although the desktop is far from a legacy platform and still dominates travel bookings, eMarketer forecasts⁶ that desktop travel sales for leisure and unmanaged business travel will dip 0.8% to \$119 billion in 2014, the first such decline since 2009. While the reduction in U.S. travel bookings on desktops is relatively small, the trends are clear. Mobile travel sales in the U.S. are forecast to jump 60% in 2014 to \$26.14 billion.

US DIGITAL TRAVEL SALES BY DEVICE
BILLIONS & PERCENT CHANGE



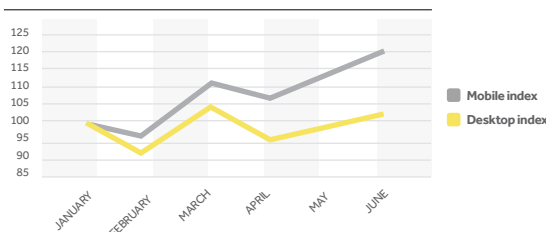
Includes leisure and unmanaged business travel sales booked via any device; numbers may not add up to total due to rounding. Source: eMarketer, April 2014; confirmed and republished, Oct. 2014

The eMarketer figures peg mobile bookings in the U.S. in 2014 as just 22% of PC sales for leisure and unmanaged business travel, but mobile travel sales are forecast to be well over half (58.7%) in 2018, eMarketer states.

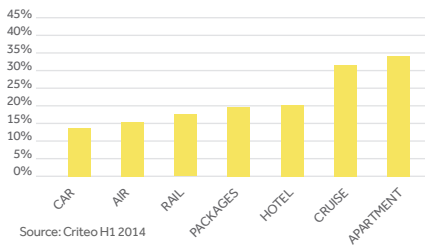
The dramatic shift to mobile bookings will likely lead to a significant shift in resources within travel companies across the board as they ramp up the hiring of developers and marketers with mobile skills. Harford of Orbitz argues that the shift to mobile is "streamlining" the business, leading to greater engagement. Harford describes the trend as "getting rid of the shackles of the desktop experience."

Another research report, "Criteo's 2014 Travel Flash Report,"⁷ documents the rapid growth of mobile bookings on the websites of more than 4,000 global advertisers in the first

SEASONAL GROWTH OF MOBILE BOOKINGS BY DEVICE WORLDWIDE IN H1 2014



SEASONAL GROWTH OF MOBILE BOOKINGS BY VERTICAL WORLDWIDE IN H1 2014



Source: Criteo H1 2014

half of 2014. Among Criteo’s findings:

While desktop bookings climbed 2% in 2014, mobile bookings increased at a far faster clip, 20%.

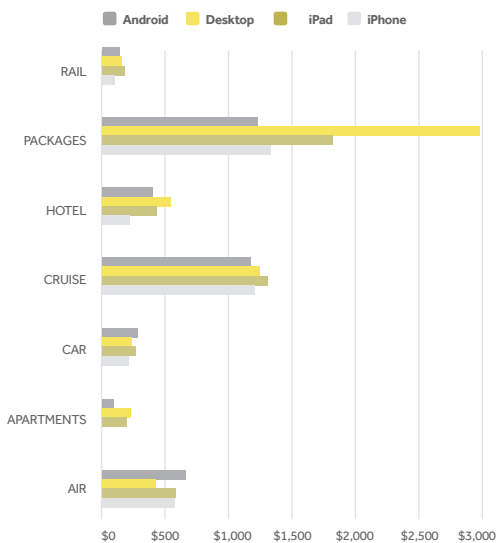
On the hotel front, Criteo found that mobile devices, including smartphones and tablets, accounted for 21% of hotel bookings.

When looking at Airbnb-like peer-to-peer apartment rentals, Criteo found that this segment of travel had the highest mobile penetration, 34% globally on the websites of its clients.

While apps are popular, they still have a long way to go when it comes to bookings. Criteo found that only 12% of total mobile bookings occurred within mobile apps.

Mobile booking platforms have a significant impact on the value of travel booked,

AVERAGE BOOKING VALUE BY DEVICE AND CATEGORY, USD, H1 2014, WORLDWIDE



Source: Criteo H1 2014

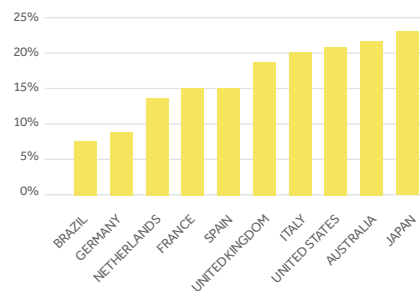
according to Criteo. The value of flight bookings on Android devices skew higher than for all other mobile platforms, Criteo found, while vacation packages booked on iPads are \$600 more on average than packages booked on other devices.

Smartphone bookings by region and country

What’s going on in travel booking? The more appropriate question should be what are the trends in a particular region or country because consumer behavior on mobile is wide-ranging by geography.

The 2014 Expedia/Egencia Global Mobile Index⁸, conducted by Northstar, surveyed

SHARE OF MOBILE BOOKINGS, BY COUNTRY, H1 2014



Source: Criteo H1 2014

more than 8,856 employed adults in 25 countries from August 25 to September 17, 2014, and found that 25% who own a mobile device have used their smartphone to book a flight or hotel, and 18% did so in the past year using a tablet.

But the regional and country-specific differences were wide-ranging, pointing for the need for strategists to alter their marketing and offerings by market.

For example, the Expedia/Egencia study found that while 24% of survey participants in both North America as a whole and the U.S. in particular had booked a hotel stay or flight via smartphone, that percentage fell to just 15% in Europe but rose to 35% in APAC.

Among the notable variances from the 24%

global number, was the UK and Germany, where just 11% and 12%, respectively, of survey participants indicated they had booked a flight or hotel on their smartphones, and Thailand (56%) and India (55%), where those numbers soared, according to the Expedia/Egencia study.

The Criteo study, which tracked mobile bookings on advertising clients websites in the first half of 2014, also picked up on the regional disparities. "Asia Pacific leads the way with more than 20% of travel bookings made on a mobile device, with Brazil and Germany less than 10%," the Criteo study found.

Among the 3,315 survey respondents globally who had traveled for business at least once in the prior 12 months, 24% indicated they had booked a flight on a smartphone, 21% had booked a hotel on a smartphone and 18% had booked ground transportation. The U.S. numbers skewed a bit higher, according to the Expedia/Egencia survey, 32% had booked a flight, 26% had booked a hotel and (20%) had booked ground transportation.

Among these business travelers who had booked a flight on a smartphone the top three countries they hailed from were Mexico (41%), Thailand (40%) and Brazil (36%) while the three lowest were Germany (11%) and France and New Zealand (14% each).

TRAVEL APPS

RANK	GOOGLE PLAY	IOS	COMBINED
1	Uber	Uber	Uber
2	Lyft	Lyft	Lyft
3	Expedia	Expedia	Expedia
4	Fly Delta	Hotels.com	Hotels.com
5	KAYAK	Fly Delta	Fly Delta
6	Southwest Airlines	TripAdvisor	TripAdvisor
7	TripAdvisor	Airbnb	Southwest Airlines
8	Priceline	United Airlines	KAYAK
9	Orbitz	Southwest Airlines	Airbnb
10	Hotels.com	Travelocity	United Airlines

APPS	COMPANY	APPS UNITED
Airbnb	Airbnb	2
Expedia	Expedia Inc	2
Fly Delta	Delta Air Lines	3
Hotels.com	Expedia Inc	5
KAYAK	Priceline Group	5
Lyft	Lyft	2
Orbitz	Orbitz	2
Priceline	Priceline Group	5
Southwest Airlines	Southwest Airlines	2
Travelocity	Sabre Corp	2
TripAdvisor	TripAdvisor	2
Uber	Uber Technologies	2
United Airlines	United Airlines	2

Latest Data August 2014. Source: App Annie

Smartphones and tablets

DEVICES USED TO MAKE BOOKINGS

	NORTH AMERICA					SOUTH AMERICA		EUROPEAN UNION				
	GLOBAL	TOTAL NA	USA	CANADA	MEXICO	BRAZIL	TOTAL EU	UK	GERMANY	FRANCE	ITALY	SPAIN
Laptop	60	57	58	55	58	55	64	61	57	57	56	61
Desktop	41	46	45	44	48	40	40	42	50	38	47	43
Smartphone	25	24	24	16	31	32	15	11	12	13	22	15
Tablet	18	19	19	14	23	18	16	17	12	13	21	13
Landline phone	13	20	14	18	27	32	9	14	17	13	13	9
Other	6	5	3	8	4	8	7	3	11	10	7	9

	EUROPEAN UNION, CONT.					ASIA/PACIFIC/ MIDDLE EAST				
	AUSTRIA	NORWAY	SWEDEN	DENMARK	IRELAND	NETHERLANDS	TOTAL APA	JAPAN	INDIA	UAE
Laptop	65	81	62	56	77	67	57	58	79	69
Desktop	44	25	43	29	33	41	42	40	28	33
Smartphone	19	16	24	9	16	13	35	21	55	40
Tablet	15	22	17	12	14	23	20	10	27	19
Landline phone	5	3	5	4	13	7	14	17	12	14
Other	6	4	4	14	3	6	6	7	2	7

	ASIA/PACIFIC. MIDDLE EAST, CONT.						
	AUSTRALIA	S. KOREA	HONG KONG	SINGAPORE	MALAYSIA	THAILAND	NEW ZEALAND
Laptop	59	41	33	70	63	38	62
Desktop	38	64	56	38	42	48	32
Smartphone	18	40	32	27	40	56	17
Tablet	18	11	23	23	20	28	15
Landline phone	19	13	8	6	11	18	22
Other	4	1	8	7	7	4	9

Question: Which of the following, if any, do you use to make travel bookings (e.g., booking airfares, hotels)?

Mobile browsing in travel is certainly gaining ground and Stephen Kaufer, the CEO of TripAdvisor, said during the company's third quarter earnings call that nearly 50% of users visit TripAdvisor by smartphone or tablet.⁹ There has been a lot of talk in the travel industry in the last couple of years that there is a lot of smartphone browsing going on but when it comes to booking lots of travelers prefer the desktop and tablet. Kaufer made that argument but conceded it's hard to be sure.

"So the combination of desktop and tablet, I believe, continues to grow, not nearly what it was several years ago as consumers shift over to using the phone for lots of browsing," Kaufer said. "When we look at, and it's one of the things that's a challenge for us and probably every other Internet company that doesn't have signed-in users, how do

we know how much that phone traffic is doing the research and then coming back to their familiar or big-screen desktop tablet to finish the research and do the purchase? Anecdotally, we know it's a chunk. Metric-wise, it's a bit hard to actually measure."

The common wisdom among U.S. travel metasearch companies and online travel agencies is that tablets are for sitting back like armchair travelers and browsing while smartphones are for getting down to business and buying.

"Tablets are for consuming content," says¹⁰ Kayak CEO Steve Hafner. "People are in very couch-potato mode on tablets. They are not on e-commerce mode. Whereas on the smartphone, from what we see, they are in e-commerce mode. They are ready to look and buy. And given the advantage of knowing

location for the consumer you can do a lot of fun stuff that we are just beginning to scratch the surface of.”

Pointing to the user behavior differences between Expedia.com’s smartphone and tablet apps, Jerald Singh, Expedia.com’s head of mobile, says “even though the experiences were very similar, we were seeing that users on iPad and Android tablet were spending a little bit more time researching their hotels.

Even if they ended up booking exactly the same hotel and in exactly the same advance purchase window. They are spending a little bit more time browsing, doing more research. We saw that our tablet users were booking a little further in advance. As you know, most mobile hotel bookings, especially for hotels today, on the smartphone are for the same day.”

However, when looking at the global booking numbers among consumers who had traveled at least once for business in the preceding 12 months, the Expedia/Egencia survey didn’t pick up a significant difference, smartphone versus tablet. Some 26% globally indicated they had booked a flight on a tablet versus 24% on a smartphone; 23% had booked a hotel on a tablet versus 21% on a smartphone, and 16% responded that they had booked ground transportation on a tablet versus 18% on a smartphone.

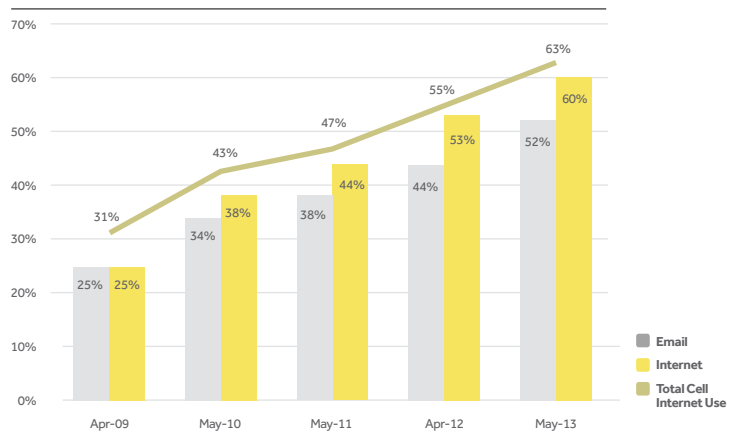
In India (75%), Brazil (74%) and South Korea (73%) the percentage of respondents that had booked a hotel using a smartphone or tablet was much higher than the global and U.S. average, according to the Expedia/Egencia survey. Conversely, Australia and Norway (39% each) and Sweden (37%) and Austria (36%) had the least app-booking usage for hotels.

And as smartphone screen sizes get larger -- i.e. 4.7 inches on the iPhone 6, 5.5 inches on the iPhone 6 Plus and 5 inches on the Galaxy S4 -- any divergent behaviors -- smartphones versus tablets -- could become less distinct.

Apps and mobile web

In the mobile apps versus mobile Web debate, apps appear to be edging ahead when looking at the world as a whole, although there are regional differences and it is too soon to declare an outright winner. Among respondents in the Expedia/Egencia survey who had indicated they used a smartphone or tablet to book a hotel, 58% globally said they had used an app and 42% responded that they hadn’t. The U.S. breakdown was basically the same, 57% versus 43%.

AMONG CELL OWNERS, THE % WHO USE THE INTERNET OR EMAIL ON THEIR PHONE



Source: Pew Internet & American Life Project Spring Tracking Survey, April 17-May 19, 2013. N=2,076 cell phone owners ages 18+. Interviews were conducted in English and Spanish and on landline and cell phones. The margin of error for results based on cell phone owners is +/- 2.4 percentage points.

Expedia Inc. is hedging its bets when it comes to apps versus the mobile web. “We are making a couple of bets there,” says Khosrowshahi of Expedia .¹¹ “We are investing heavily in our app product and in driving downloads on a global basis. We have more than 150 million downloads now globally. And, we are also making a very big bet on responsive Web design, which is making sure that whatever services that we build across our brand family that those are available in a responsive way across any device that you are on. Whether it is a tablet or a mobile phone. Eventually it will be watches etc. It is a different way of design. It is more complex. There is a challenge in moving from the old way of designing to responsive design,

but we are very consistently moving over more of our sites onto responsive, which makes for a terrific mobile experience across whatever device you may be using.”

TripAdvisor’s Kaufer argues that there is no clear winner yet globally in apps versus mobile Web. “The jury is still out in terms of mobile Web versus mobile app,” Kaufer says.¹² “We see resounding votes for both. We have a lot of app usage and a lot of mobile Web usage.”

“We see coexistence for the foreseeable future, and TripAdvisor hasn’t gone the route of an app for each and every brand that we have, but where there’s a specific need we do look at creating frequently a custom app for it,” Kaufer adds.

It is clear that most online travel players have a preference for apps over the mobile Web because they bypass the cost of constantly having to reacquire the customer through paid search. In India, where online travel agency MakeMyTrip attracts about 25% of its hotel bookings through mobile devices, CEO Deep Kalra votes for apps.¹³

“Definitely apps are our favorite medium because of the obvious advantage of not having to re-acquire the the customer,” Kalra says. “App customers convert higher, and then you can attribute some kind of lifetime value there. We incentivize people not to download our app, but to do their first transaction through our app. We have 3.2 million app downloads through the end of last quarter [Q2 2014], and that number is growing well.”

Interview: Expedia on its new mobile search for flights and hotels

Interview: Jerald Singh, Expedia.com head of mobile, on federated search and mobile payments

In early October 2014, Expedia debuted a tablet app that utilizes “federated search,” enabling users to pick a destination and dates, and then the app launches flight and hotel search together with results listed side by side. Skift spoke with Jerald Singh, Expedia.com’s head of mobile, who discussed federated search, mobile design and payments, as well as wearables, and a test and learn culture.

Skift: I was wondering if you could talk about the new Expedia app and its federated search feature.

Jerald Singh: First of all, our app is a universal app. So when someone downloads an Expedia app from the app store they are actually getting the same binary they would get if they downloaded the iPad app or the iPhone app. What we did is essentially take our existing experience and we blew it up for the iPad. We had that out in the market for awhile and we started looking at the data. And it was the difference in the data we were seeing that made us build a brand new experience.

We were seeing that even though the experiences were very similar we were seeing that users on iPad and Android tablet were spending a little bit more time researching their hotels. Even if they ended up booking exactly the same hotel and in exactly the same advance purchase window. They are spending a little bit more time browsing, doing more research.

We saw that our tablet users were booking a little further in advance. As you know, most mobile hotel bookings, especially for hotels today, on the smartphone are for the same day. On iPad and tablet a high percentage are also on the same day and we were seeing the same results with the new experience. We looked at the data and we looked at how people in general were using their devices. When you see how folks use smartphones our experience with our smartphone app was built very much to allow the user to get through the shopping and booking flow as quickly as possible in the least number of steps.

On the tablet, though, we didn’t want to build the same experience because we knew that people were engaging a little bit more with the app. We wanted to build something that was much more visually rich, something that allowed users to do the comparisons against hotels.

Finally, we wanted to build an experience that had two additional elements. One was it allowed them to discover new destinations. When you start the new app you essentially are in discovery mode. You can browse through different destinations, all of it, by the way, is hand-curated. All the images are hand-picked. What we wanted to do was bring out the rich visual nature of travel.

The other thing was we wanted to build is an experience where users instead of having to think about whether they were just going to book a hotel or just going to book a flight, which is how our existing smartphone app is, we wanted to allow users to think holistically. To think about their entire trip at once. So this is where federated search came about.

Skift: So how does the app experience differ smartphone versus tablet?

Singh: It goes back to the way that people use smartphones. On the smartphone, the majority of our users are booking same-night hotels. And they are booking hotels that are nearby. What we do on the smartphone is that as soon as you launch the app we pull your current location from GPS, we do a current location search, and then we sort it by hotels that are giving you the biggest discounts. If you click on the hotels button, you actually get a list of all the hotels for your current location for the same night.

On the flight side because we can't simply do flight searches automatically, what you are seeing is a list of popular destinations that you can click on. Or you can just flights button and enter in your origin, your destination and your dates. On the smartphone, it is not federated. We are doing something essentially that the user is naturally doing when they are using the app.

On the tablet it is federated. On the tablet all we ask you is one question, which is, where do you want to go? Suppose you are sitting in San Francisco and you want to fly to Seattle, you type in Seattle and at that point what we do is we go out and do both a hotel and flight search for Seattle and we show you the results side by side.

Skift: I spoke to your CEO, Dara Khosrowshahi, a few weeks ago¹⁴, and he talked about push notifications. Are we going to be seeing a lot more of that?

Singh: I think you're going to start seeing a lot more of them. I think the key for us is to make sure that they're highly relevant to the user before we start sending push notifications. If you start seeing some of the changes in iOS 8 that Apple has enabled push notifications are now interactive. So directly from the push notification, you can either do an action or you can bring the user back into the app. So our approach for push notification is to send them out when we can get something of high value to the user and when we know it's relevant to the user.

I think one of the challenges we're facing in mobile today is we're getting beyond enabling a user to download the app. Re-engaging that user is just as important. So when we look at push notifications, when I look at our pipeline, our road map for the rest of the year into next year, being able to re-engage with the user is a core part of it. That re-engagement can either be through a push notification where we alert the user that a hotel that they're looking at is now priced lower or we alert the user that their flight is on time or it's delayed, or we allow a user to share their itinerary via push notification, all these things really push for this engagement.

Skift: It seems that mobile-only deals or special offers are really picking up. I noticed TripAdvisor in its app is now displaying these special offers directly from the hotels that with lower prices than the hotels' own websites. I also read in an analyst's report that Google is planning to do the same sort of thing.¹⁵ So what is your take on the seeming increase in these mobile-exclusive deals?

Singh: We've had mobile-exclusive deals in our app probably close to two years at this point. One of the reasons we are big on mobile deals, or have been thus far, is because it's a way for us to get our users onto the mobile path. We can show them either the app experience we build or show them the really fast mobile web experience that we've built.

For us, it's been a great way for us to offer something to the user in order for them to download our app and use our app. Once the app is downloaded and once they start using it, we believe we built an experience that is beautiful as well as compelling and delightful enough where they come back to the app over and over again.

Skift: What other mobile trends stand out?

Singh: Our first entryway into wearables was actually via Samsung. Apple, Google, and Samsung are all good partners of ours and we built an app for the Samsung Gear. The reason we did this was not necessarily because we thought that it would be a big hit or we'd drive a lot of downloads. We did it because we wanted to start experimenting with wearables.

There is this constant drive for continuous shopping where after you've done a search, after you've given us some intent, what we can start doing is continue looking at the price of the hotel, continue looking at the availability of the flight, and we're able to start pushing you data. When I say pushing you data, I don't necessarily mean by push notifications. It could be through an in-app experience.

Our first entryway was actually around the itineraries because our itinerary app on the phone is very contextual based. Meaning that if you booked a flight, a hotel, and a car, when you launch your itinerary, the first thing you see is which airport you're flying from, what gate it is, which airline it is, and what the confirmation code is and whether the flight is on time or not.

Once you're in the air, we actually show you how long before you land. Once you land, we then tell you where your car rental agency is. Before you get to the hotel, we tell what the hotel name is, what the address is. So it's all contextual.

The watch app does something very similar to that. Looking at two things with wearables, one is that context really matters because now this is yet another device where the user is wearing it all the time. We want to make sure that every time they glance at our app on the watch, it's providing some sort of contextual data. This is why Scratch Pad matters even more. This is why we're lucky to have a platform that allows us to connect all these different devices. So anything that you've done previously on your phone or on your tablet or on your desktop is available to you on your watch as well. We see this as a trend.

Skift: How will mobile payments impact Expedia and the user experience?

Singh: We have a fairly quick experience. If you're logged in, we pull all your user data, your travel profile data, we'll pull your billing data as well and you would essentially have one swipe-to-book action that you'd have to do in order to book something. So it's very easy. We think with Apple Pay, specifically, it will just make things easier. Now, as a user, I set up my cards on my iPhone and if the app developer integrates and comes to Apple Pay it makes it very easy to do a check out without having to log in, without having to reenter all that data. So we're obviously evaluating Apple Pay. We'd love to get that into the app as quickly as possible. Then we have a great relationship with Google as well, Google Wallet.

Google Wallet has been successful for us, as well. When you look at Google Wallet, when you look at Apple Pay, really the key thing that both these implementations provide is ease of booking for the user. It's one less thing that they have to do in order to transact in mobile because that information is already stored. It's easily available to the user. It's easily available to us, the developers.

Mobile bookings by consumer type



Source: Garry Knight/Flickr

Consumer habits

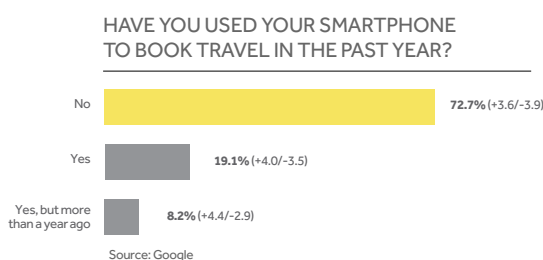
Online travel agencies, including Expedia, Orbitz and Qunar, for example, have talked about the preponderance of same-day or prior day bookings on smartphones, particularly for hotels. Using Google Consumer Surveys, Skift asked Android users age 25 and older, "If you booked a hotel with your smartphone over the past year, did you typically book it a week or more in advance or last-minute?"

In a Google Consumer Survey served up to Android smartphone users age 25 and older, Skift asked, "Have you used your smartphone to book travel (airline ticket, hotel room, etc.) in the last year?" Among the 1,002 responses received, 55.1% indicated they had used their smartphones to book travel in the last year, 41.1% said they hadn't and 3.8% couldn't remember. The demographic differences were not statistically significant.

The percentage of Android smartphone users (55.1%) who stated they had booked travel on their phones in the past year was much higher than the (19.1%) of respondents from the general Internet population who said they, too, booked travel on their

smartphones as shown in another Google survey.

Using Google Consumer Surveys, Skift also posed the same question, "Have you used your smartphone to book travel (airline ticket, hotel room, etc.) in the last year?" to the general Internet population age 25 and older. Among the 3,342 responses, 72.7% indicated had not used their smartphones to book travel, only 19.1% indicated they had booked travel on their smartphones in the past year, and 8.2% responded they had booked travel on their smartphones, but it was more than a year ago.



The highest percentage of respondents from the general Internet population who indicated they had booked travel on their smartphones in the past year were the 25- to 34-year olds (27.1%), followed by 35- to 44-year-olds (19.5%) and 45- to 54-year-olds (15%). The differences between men and women among

the general Internet population when it came to booking travel on their smartphones in the past year were not statistically significant in the Google Consumer Survey.

After qualifying those respondents who indicated they had booked travel on their smartphones in the past year, Skift posed a second question to this general Internet population, "When booking travel with your smartphone, do you typically book a week or more in advance or last-minute?" and received 499 responses.

The greatest percentage of respondents (44.9%) indicated they typically booked their travel via smartphones a week or more in advance, 32.4% responded they booked their travel via smartphones using a mix of advanced and last-minute bookings, and 22.7% stated they booked last-minute.

Among the merely 107 respondents who indicated they booked travel on their smartphones at the last minute in the past year, the highest percentage was 55- to 64-year-olds (27.2%), followed by 35- to 44-year olds (24.6%) and 45- to 54-year olds (21.3%).

Business travelers

The managed travel sector has been notoriously slow to adapt to new technologies despite the fact that many road warriors as individuals take pride in being

early adopters.

The CWT Travel Management Institute forecasts that mobile will represent just 7 percent of global online bookings in managed travel in 2014, and will increase to around 25% in 2017. In a global survey of travel managers as part of a study on mobile travel solutions, the CWT Travel Management Institute found that the two most significant impediments to wider adoption were security issues -- always a key concern for corporations and travel management companies -- and "a lack of available features."¹⁷

As part of the same CWT Travel Management Institute global survey, which was conducted from December 2013 to May 2014, 54% of business travelers and 65% of travel managers indicated that they consider mobile booking capabilities "important." And both business travelers and travel managers responded that they believe mobile bookings for flights, hotels and car rentals would more than double from 2014 to 2016.

Some 70% of business travelers use a maximum of two apps, the survey found, although business travelers taking at least 20 trips per year download 4.3 travel apps and use 2.8 on average.

With business travelers using only a handful of apps -- or less -- that bodes well for aggregators that can offer all types of inventory.

Interview: TripAdvisor turns to push notifications

Interview: Adam Medros, senior vice president of global product, TripAdvisor, on Push Notifications and Instant Booking

TripAdvisor has rolled out Instant Booking¹⁶ in its mobile apps in the U.S. and is beginning to do so on the desktop, as well. Instant Booking enables travelers using the TripAdvisor hotel metasearch product to complete the booking within the app or on TripAdvisor.com through an online travel agency or hotel fulfillment partner without leaving TripAdvisor apps or websites for easier conversions. Skift interviewed Adam Medros about the progress of Instant Booking, push notifications, Special Offers from hotels, and mobile payments.

Skift: One thing I've noticed is a lot more push notifications from TripAdvisor, both from the app, and through Facebook.

Medros: Yes, if you know anything about TripAdvisor, it's that we do a lot of experimentation, and we're certainly not shy about trying out new technologies, and new ways to engage users. With Instant Booking, it's given us a reason and a path to try to reach out to consumers. Phone notifications is the most predominant way and we'll see if that fits into the booking journey that a lot of consumers are on.

You've heard the stats quoted before that users visit a lot of different sites before they book. And booking is not a sit down, get it done process. But especially, as you go from a business trip-type booking to a family vacation type of booking, there's a lot more thinking about it, talking about it, and notifications are a good way to bring that user back to where they were, and let them continue that booking process.

Skift: Do you see the rest of the industry going in this direction as well?

Medros: With any technology you are going to find an equilibrium where we're all very mindful of what's working and what's not working out in the world. So I do think people will take advantage of notifications. I think notifications are amongst many ways to re-engage with users. You've got to be really careful about frequency and appropriateness of the message. There are some apps that do a really good job of notifications, and then there are some that I think make me feel like I want to delete the app because it's not giving me something valuable.

Skift: What are some best practices about notifications? Make it relevant, I guess, but in what way?

Medros: I think make it relevant. Take cues from the device. So I think there are lots of ways, depending on the type of notification that you're building out. You can do things around view or location change that I think are valuable versus just put it under a timer and have it blast you every 12 hours with a non-specific message.

Skift: What is Instant Booking doing for TripAdvisor and where is it heading?

Medros: When you look at mobile devices, in particular, Instant Booking is kind of a no-brainer for

users. Meta, as a transition for us, was a really good one and one that was all about better user experience, and I think Instant Booking, especially on phone, is a continuation of that. There are just too many sites that aren't mobile-optimized. And users want to be able to transact on a site that they trust, and they trust TripAdvisor. That being said, I think we're really happy with where Instant Booking is right now. It's rolled out 100% on mobile [in the U.S.] And that's because it's a better experience, a good experience for users.

Skift: Within Instant Booking were you looking to give them a choice of a number of different Instant Booking partners?

Medros: We started from where we were on meta, and said, let's give users this choice. So, hey, you can book it directly inside of the TripAdvisor app, and pick which partner you want to book with. And we evolved from that to giving users the best price and the room selection that made the most sense for them. What we learned was that it's all about simplicity. In retrospect, not that surprising. Simplicity, making the flow really easy to understand, easy to get through. Users are already on TripAdvisor; they already trust us.

It's not a matter of giving them a lot of choice about which partner. It's about giving them good rates, good inventory, with brands that we've vetted, and that we trust, and by extension, they're going to trust, and then making that really simple. So we've done lots of experimentation around the booking flow. I think this is what you probably hear from anyone else that's in the transactional space is that you spend a lot of time on doing these small tweaks to language and button and flow to make the shopping experience easy and fast.

Skift: I'd like to hear you talk about the Special Offers in the TripAdvisor mobile app. Companies are always offering deals. But this seems to be a little bit different. Can you talk about that?

Skift: Special Offers is part of the TripAdvisor for Business offering. It's an extension of the Business Listings product. If you look across the travel landscape, you see a lot of discounts, maybe even faux discounting, everything's 40% off, but you're hard-pressed to find that actual price anywhere. I think to some extent, while that's all nice and fine and we know what that kind of discounting does in terms of driving consumer demand or keeping consumer interest.

A Special Offer is something that's within the hotel's control to differentiate themselves from the competition. So in some cases you're seeing pricing offers or buy three nights, get the fourth one free-type offers. And in some cases you're seeing Special Offers that reflect the personality and the uniqueness of that hotel, and I think that when hotels can really market themselves to their appropriate consumer base on a platform like TripAdvisor, everybody's happier.

Skift: You mentioned photos and reviews. What role do they play in mobile booking?

Medros: They're certainly important. They're important on desktop and on mobile. Mobile devices are, I think, particularly strong around photo usage. It's a really easy device to swipe in terms of seeing lots of photos. People consume a good number of photos in a sitting so once they get into photo mode, they continue to move pretty quickly.

And then, as you know, our TripAdvisor Media Group acquired Oyster last year, and we've been integrating the Oyster photos into both desktop and mobile and expanding the number of hotels that are covered by Oyster. So you've got really great photography, high-

high-quality, not retouched, not Photoshopped, not any of these things. And I think it ultimately gives users this real sense of what this place is going to be like and is it the right place for me? And ultimately that drives people coming back to TripAdvisor, spending time on TripAdvisor, and ultimately booking properties via TripAdvisor.

Skift: Do the things you are doing on mobile such as Instant Booking have applicability to vacation rentals? Or is it just about hotels?

Medros: Absolutely. I think there's applicability across a couple of categories. The vacation rental team has been hard at work expanding the number of properties on TripAdvisor that you can book instantly. So you can book them from a transaction standpoint as opposed to emailing back and forth with the owner, and then sending the owner a check via mail type of thing. It's a logical extension to look at that being part of a broader strategy around being able to transact and being able to transact particularly on mobile.

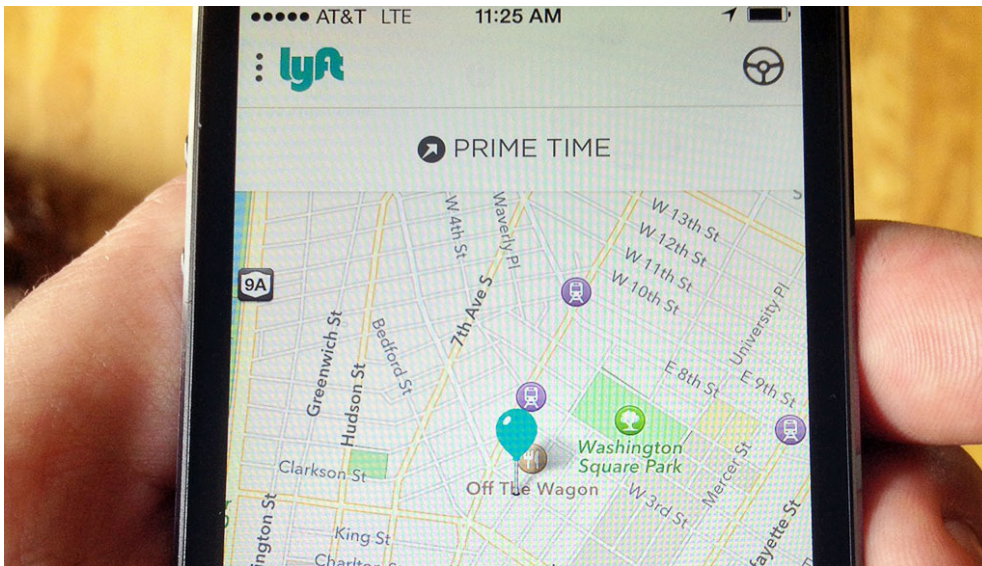
I think the same thing is true when you look at restaurants and attractions. We're now deeply integrating restaurant bookings into both desktop and mobile. And we're starting to work with clients on the integration of attractions bookings. And all of those will benefit from users being comfortable with transactions on a mobile device, aware that TripAdvisor enables that kind of transactional behavior on a mobile device, and quite frankly, leveraging the 140 million downloads that we have of the TripAdvisor app. So people are taking this app with them, all over the world and using it while they're on vacation.

Skift: What's happening regarding mobile payments with Apple Pay coming out and Google Wallet and all of that stuff? How does that impact mobile booking and what's in store?

Medros: I think you can look at it two ways. One is, I think Apple Pay, in particular, is going to really accelerate the adoption of mobile payment. And that's not to say that Google Wallet didn't help that process, but I think there are a lot of data points showing iOS devices as being the devices that are a little more ubiquitous when it comes to shopping behavior. I think with Apple Pay it's going to take a little bit of time, but I think this is the piece that's going to really make everything start moving downhill in terms of momentum.

And then as users get comfortable with transacting on mobile devices and they're already pretty comfortable with that, but with this acceleration, I think you're going to see payment technologies and integration happen quicker. At the end of the day, users want to be able to transact quickly and easily, but they also want to be sure that they're doing so securely.

Case studies



Source: Skift
Lyft's app.

Sharing economy on mobile

When considering iOS and Google Play combined numbers in the U.S., sharing economy companies, including Uber (1), Lyft (2) and Airbnb (9) were three of the most-downloaded apps in August 2014, according to App Annie.¹⁸ Airlines, including Delta's Fly Delta (5), Southwest Airlines (7) and United Airlines also took three of the top 10 positions.

Within the travel & transportation category in August in the U.S., App Annie found that downloads of ground transportation apps grew faster than any other travel subcategory, including lodging, airlines and aggregators. "Public transit apps were especially popular, claiming six of the top ten spots among ground transportation apps on both iOS and Google Play by downloads in August," according to an App Annie blog post.¹⁹

"These apps help riders plan and execute their trips by providing a variety of information, including system maps, route planners and real-time vehicle tracking. Two public transit apps in particular, TransLoc and DC Metro Transit, experienced high download growth from July to August." The sharing economy

was, of course, well-represented in the ground transportation subcategory with Uber (1) and Lyft (2) heading the top 10.

Booking last-minute car rentals

Hertz isn't seeing any major shift to last-minute bookings on mobile because prior-day and same-day reservations and bookings have been the trend, regardless of computing platform, in recent years, Glore Centeno, Hertz's senior director of eBusiness, tells Skift. Such customer behavior is obviously deeply ingrained because advance reservations tend to generate lower rates, Centeno says.

Hertz introduced its third-generation iOS app in early 2014, choosing to aim for the next Android release in Q1 2015 as Android users only accounted for about 22% of Hertz's mobile Web and app users, Centeno says. iOS users also tend to book more rental days and higher-class cars.

Hertz's e-commerce unit handles all of the company's customer-facing technology, and introduced the updated iOS app this year with the view of delivering a consistent customer experience across all platforms when customers leap from device to device,

Centeno says.

When the iOS app made its debut earlier in 2014, it was saddled with latency issues that have been corrected, Centeno says. The company likely heard the backlash because Centeno says it's a trend that app users are getting "more demanding and vocal."

"I guess they feel I downloaded this thing, I have this relationship with you," Centeno says. "You should give me what I want."

Taking app users' sentiments into account has become an important part of the development process. Centeno says a feedback feature was added to the iOS app in July 2014. Team members review app ratings weekly and troubleshoot problems that users point out.

Hertz is putting a lot of emphasis on users of its apps. While mobile Web users are split fairly evenly between Hertz Gold Plus Rewards members and nonmembers, the majority of app users belong to the loyalty program, Centeno says.

For the iOS app, Hertz said it enhanced its stability and design with the goal of making it faster and easier to make a reservation. Says Centeno: "We want to make that experience as quick and painless as possible."

Mobile payments ease some of the pain

Mobile developers consistently remark that streamlining an app experience usually leads to increased conversions, and many are hopeful that advances in mobile payment technology, from Google Wallet to the new Apple Pay, will similarly improve the user experience.

OpenTable CEO Matthew Roberts notes that the restaurant reservations company has long taken the friction out of the pre-dining experience by facilitating online and mobile restaurant reservations. But in the fall of 2014, OpenTable debuted Pay with OpenTable, a mobile payments solution initially rolled out in San Francisco and



Source: Marriott Hotels

New York, and with plans to expand its availability to 18 cities by the end of 2014.

Roberts says OpenTable has expanded its focus to improvements of the dining experience itself and that's where Pay with Open-Table comes in.²⁰ Instead of having to flag down a waiter, present a credit card and wait for the waiter to run the card and return the check, there is now a solution on your phone.

"And then of course we have brought a lot of convenience to what has historically been a pain point, which is having to pick up the phone and make the booking," Roberts says. "A lot of our focus has been around that and we are absolutely best-known for that aspect. What is exciting for us as a team is to broaden that out. Now that we have done a lot of the hard work to set ourselves up to excel in what happens before we wanted to branch out into what happens during your dining experience."

OpenTable worked closely with Apple on the recent launch of Apple Pay, which streamlines the mobile payments process for OpenTable users even further. "You can really think of it as an enabling technology for the experience we have already built," Roberts says. "Simplistically, one of the greatest benefits of it is that as an OpenTable diner, you don't have to take the time to store your credit card in your profile with us. That is the most straightforward benefit that I can articulate, but it is an important one."

Mobile checkout and Marriott

Earlier in 2014, Marriott introduced mobile checkout for Marriott Rewards members at all of its properties around the U.S. and in a couple of dozen properties internationally, too.²¹

Marriott Rewards members using the Marriott app can view their bill on their phone on the morning of their scheduled departure. When they checkout on their smartphones, they pay through their credit cards on file and can leave their keys or cardkeys behind.

Several global chains, including Marriott, Hilton Worldwide and Starwood are working on mobile check-in, but Marriott was one of the first to implement mobile checkout across the brand.

Metas become bookers

Travel metasearch sites from TripAdvisor to Hipmunk and Skyscanner are increasingly giving travelers the option of completing their bookings within their respective metasearch apps, and sometimes on their websites because it is a sure-fire way to increase conversions of lookers to bookers. On an even more granular level, the metas hope such facilitated bookings, with either an online travel agency or hotel brand handling the booking and fulfillment in the background, increases the odds of travelers following through and completing bookings that they started.

The alternative is to hand off travelers to third-party online travel agency, hotel, airline and car-rental sites, where users' search and booking experiences can range from great to ugly.

If it seems like the metasearch companies are starting to resemble online travel agencies, then just consider that online travel agencies such as Orbitz.com and Expedia.com are starting to show pricing from rival online travel agencies -- metasearch-style --

alongside their own search results.

The blending, though, only goes so far, says TripAdvisor CEO Stephen Kaufer.²² "I think Orbitz would tell you they are an online travel agency," Kaufer says. "They contract with hotels. They sell hotel rooms. And they are putting in the meta to make sure as a consumer you don't have to check around."

"For TripAdvisor, we are not building up a market management force," Kaufer adds. "We are not contracting rooms directly with us. We are in the media business. So we are helping a consumer go further down the funnel, but at the end of the day it's still Getaroom, it's still Best Western, and somebody else who's selling the hotel room on TripAdvisor. So it blurs, but I am not an OTA and I don't think Orbitz would call themselves a media company."

The metasearch sites are handling these "Book on Hipmunk" or "Book on TripAdvisor" features in varied ways. Hipmunk, for example, gives customers multiple options simultaneously for booking a hotel within the Hipmunk app or on the desktop such as through Booking.com, Hotels.com, Getaroom.com or Orbitz.com.

But in test and learn mode, TripAdvisor started out giving its users multiple options per hotel for its Instant Booking feature, but found that customers preferred simplicity and just one choice, says Adam Medros, TripAdvisor's senior vice president of global product.

Scotland-based flight and hotel metasearch site Skyscanner is stealthily testing a facilitated booking option with partners in the U.K. but unlike most of its competitors Skyscanner won't necessarily display the book on Skyscanner feature as the highest-displayed option, says COO Mark Logan.

"We're a virtual search engine at heart," Logan says, adding that Skyscanner will implement the feature "slightly differently"

and doesn't want to confuse its customers.

Tours and activities become available

Travelers booking tours and activities on-the-go through their smartphone or tablet when already in the destination seems like a natural fit but one of the biggest impediments to making that happen is a lack of connectivity, or specifically last-minute availability.

The tours and activities scene is such a fragmented industry, and getting suppliers online is a massive undertaking, but there are strides being made across the sector. Viator, for one, recently announced that it now has more than 100 suppliers in more than 30 countries hooked up to Viator through an API that features live availability of tours and activities. There are also 10 aggregators and booking systems tied in.

"We're connecting for live inventory access," Viator CEO Barrie Seidenberg says. "Last-minute availability obviously is a big deal. We are also connecting for bar codes. There are some suppliers like the Empire State Building and the Seattle Space Needle that we're connected to. In those cases we are getting live bar codes. Also Big Bus, one of the operators we are using for hop-on hop-

off, we get live bar codes. Now you get an electronic voucher and you can just get on the bus or got direct to the gate because of the bar code, which is a big convenience for consumers," Seidenberg says.

TripAdvisor, which acquired the OpenTable of Europe, Lafourchette, in May 2014 and Viator in August 2014 is making a big bet on mobile and in-destination bookings for travelers and locals. "So now if I go to Paris I can search for a restaurant with availability at 8 p.m. and I didn't used to be able to do that," says TripAdvisor CEO Stephen Kaufer.²³ "Now I can. Soon with Viator you will be able to do much more in terms of actually cementing a trip, cementing those plans with what you want to do when you are there while still on the TripAdvisor site."

There is still a ton of work to do, though, Kaufer says. "Viator already has all the ingredients for mobile," he adds. "On a trip that I booked recently, I booked my tour while I was in-market using Viator's mobile app. It works. The question mark is how many people around the world already have the mobile app on their phone to book tours and attractions?"

Answer: Basically nobody."

Insights and strategies

- Though still a fraction of the size of desktop bookings in the U.S., mobile booking are growing at a much faster pace, and travel companies' budgets and strategies should reflect this inflection point.
- Figure out how to ease the transition of your customers from device to device because a travel search that might start on a tablet or smartphone might be continued on desktop and vice versa. Your company will have a much better chance of capturing the booking if the user doesn't have to start the search all over again.
- Push notifications are increasingly popular among travel companies as a means of getting customers to continue a search or provide useful information. They won't be popular among travelers, though, unless they are relevant, contextual and not overdone.
- Travel companies need to release mobile products quickly, then study the data and feedback, tweak or overhaul, and release the next iteration. Don't rely on hunches or opinions, but rely on the data.
- Experiment with ways to streamline bookings in smartphone apps. Removing friction will increase conversions.
- For travel metasearch companies, enabling bookings within native apps will likely increase conversions. TripAdvisor, for one, found that keeping things simple by limiting the number of Instant Booking partners per hotel choice increased conversions, but each meta will have to see what works for them.
- Design isn't just a frill in smartphone and tablet apps, but leads to engagement and conversions.
- Travel startups need to focus on features of products that they can deliver well in mobile rather than being everything to everyone. As with anything in mobile or on desktop, there has to be a commitment to test, learn and move fast with the next iteration.
- Mobile-exclusive deals are gaining importance but bait and switch tactics will backfire sooner or later, probably sooner.
- Be alert to changing user behavior on smartphones and tablets. With the advent of larger screens for smartphones, customers may begin to do more browsing than they had in the past. Study the data and adapt.

- It's a no-brainer but worth repeating: mobile marketing and products need to be country-specific. In the U.S., for example, Expedia is pushing the seamless transition from device to device. In India, where smartphones are bringing people online for the first time, MakeMyTrip seeks to keep customers on smartphones rather than seeing them switch from device to device.
- Resources permitting, experiment early with new mobile payment options and wearables to get ahead of the next big trends.

About Skift

Skift is a business information company focused on travel intelligence and offers news, data, and services to professionals in travel and professional travelers, to help them make smart decisions about travel.

Founded in 2012 by media entrepreneur Rafat Ali, Skift is based in New York City and backed by Lerer Ventures, Advancit Capital and other marquee media-tech investors.


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