How travelers are using mobile in 2019

End traveler and industry research

Travelport Digital ✈

Content

Introduction

Welcome to Travelport Digital's '*How travelers are using mobile in 2019'* research report. Highlighting the views of over 1,100+ travelers and 100+ industry professionals, this report is our biggest piece of research to date and gives a consolidated view of how mobile is impacting the travel market today.

In November 2018, we undertook a survey with end travelers from across the world. We wanted to find out how travelers are using mobile for travel inspiration, searching, booking, and in-trip management. Some of the insights presented here show how business and leisure travelers differ in the ways they use mobile for travel—and what's become clear is that business travelers are most reliant on mobile to complete every travel-related activity.

Other insights in the report look at why travelers download mobile apps, where they expect to be able to engage with brands on their smartphones, and what new mobile channels they're using to search, book, and manage trips.

In addition to our end traveler research, our 'Industry take' looks at how airlines and travel brands are responding to market trends. We uncovered some interesting findings: while all industry respondents agreed that having a mobile strategy is important to the future success of their organizations, only 39% said that they are investing a lot or enough to keep up with the competition.

These insights should prove useful to travel brands who are looking to create a new mobile strategy or refine an existing plan. By looking at how travelers are engaging with travel brands on mobile today, and how they expect to engage in the future, brands can prioritize investments in the channels and technologies that will deliver the greatest return. So dive in, explore the insights, and take note of how you can strengthen your digital plans using this data.

Research highlights
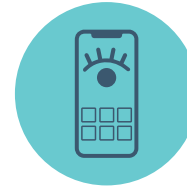
'App fatigue' is not impacting travelers

- 61% of travelers 'nearly always' or 'sometimes' use a smartphone app to book flights.

- Leisure travelers prefer to use apps over mobile web for every travel activity, other than searching/booking in-destination activities and car hire.

- Business travelers prefer to use apps over mobile web for every travel-related activity.

- The top reason travelers download a travel app is to search and book flights or accommodation.

- The features that travelers find most important to have on a travel app are: seeing an entire trip itinerary, real-time flight alerts, ability to search and book flights and mobile check-in.
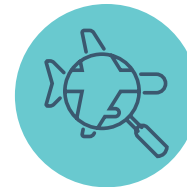
Searching and booking channels are diversifying, although app usage remains steady

- Smartphone apps and desktop are the preferred channels for searching and booking flights and researching other parts of the trip. Desktop still overtakes mobile when it comes to paying for flights.

- Conversely, business travelers are as likely to use a smartphone app as a desktop to pay for flights, with 85% using an app to book flights.

- Almost half of travelers are turning to social media to search and research travel, and 28% have used social to book flights.

- 59% of business travelers have used social media channels to book a flight.
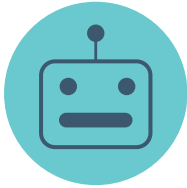
Voice and chatbots are changing the game for how we travel

- 81% of business travelers have used voice assistants during a trip.

- Travelers want to check flight status, check in, and find directions using voice commands.

- 66% of business travelers and 48% of leisure travelers feel it's important to have live chat capabilities within a travel app.

- More than half of leisure travelers are unaware of the ability to chat with travel brands via social, messaging, and voice.

More and more travelers are using mobile to buy ancillaries

- 77% of business travelers and 53% of leisure travelers have booked hotel rooms via mobile.

- Business travelers are buying more on mobile, with more than half of respondents saying they have bought every listed ancillary via their smartphone.

- 57% of all travelers said that the ability to add ancillaries to a booking is an important feature to have on a travel app.

Push notifications are the channel of choice for traveler communications

- 56% of travelers expect to receive information on travel disruptions via push notification before check-in.

- 52% expect to receive disruption information via push on the day of travel.

- There is a 10% increase in travelers having push notifications activated on travel apps and a 22% increase in travelers finding push notifications useful.

- The most important push notifications for travelers are: trip status, flight price change alerts, and reminder of booking in progress.

- When it comes to communicating offers, email is still the preferred channel for travelers.

Boosting app downloads and retention rates relies on good word of mouth and great UX

- Good app store ratings and recommendations from friends/family are the primary reasons travelers gave for downloading a travel app.

- Travelers loyalty is there for the taking; 66% say they have never deleted or uninstalled a travel app.

- The biggest reasons travelers gave for uninstalling an app include: phone storage space, only needing the app for a specific trip, and it was difficult to use.

- A bad app user experience can be the kiss of death for a travel brand; 65% of travelers would be unlikely to book with a travel brand again if they had a bad experience in their app.

End traveler research

Survey overview

Format: 10 minute questionnaire

Sample size: 1,100+

Date: November 2018

Market: USA, UK, Australia, Ireland, Singapore, Germany, Canada, New Zealand

Age profile
(years old)

- **3%** 69+
- **1%** -18
- **18%** 18–28
- **13%** 59–68
- **15%** 49–58
- **27%** 29–38
- **23%** 39–48

Location

- **40%** North America
- **33%** Europe
- **5%** Asia
- **1%** South America
- **11%** Australia
- **9%** Other
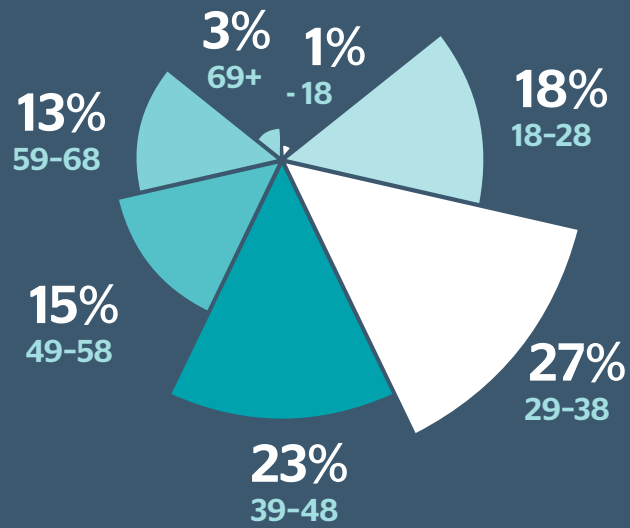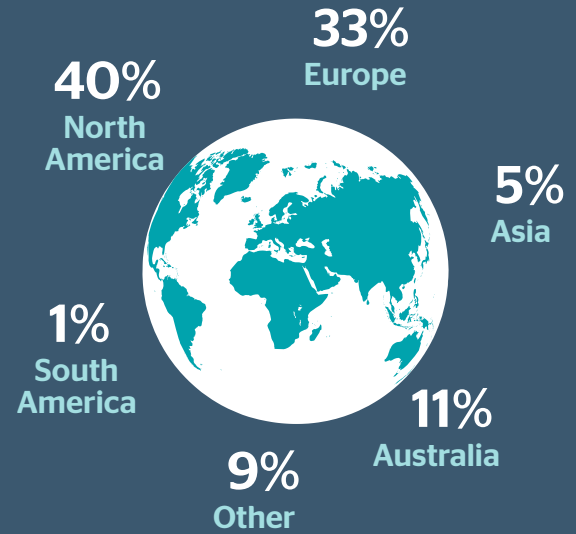
Number of trips
(taken per year)

- **26%** 3–5
- **8%** 6–10
- **3%** 11–20
- **1%** 20+
- **15%** None
- **47%** 1–2

Traveler type

- **24%** Couple
- **43%** Family
- **9%** Business traveler
- **17%** Solo traveler
- **7%** Group of friends
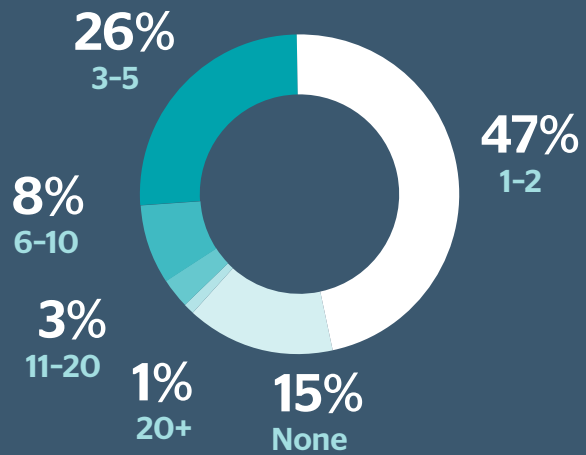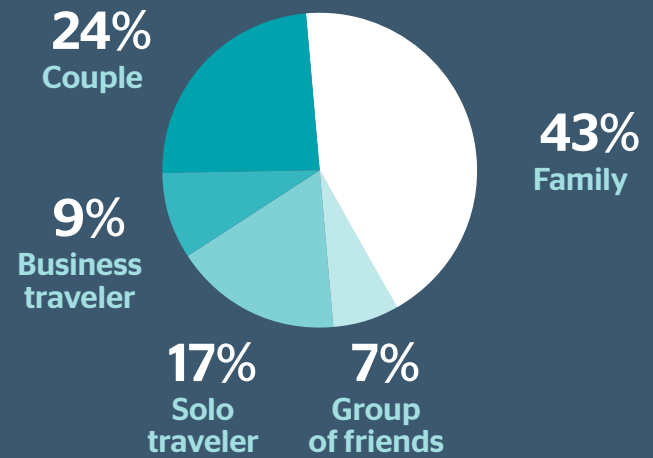
Apps are on the up for another year

KEY TAKEAWAY
Despite alleged 'app fatigue', travelers are still downloading as many apps as ever, with airline and hotels topping the list.

With approximately six million apps available between the two main stores (iOS and Android), it's fair to say that 'app saturation' is closer than ever. When it comes to travel, we're particularly spoilt for choice: itinerary management apps, online travel agencies, travel comparison sites, accommodation booking, airlines, hotels, car hire. Travelers are faced with endless app options, each of which fulfils a different need.

When we set out to undertake this year's end traveler research, it was with this case of 'app overload' in mind. We wanted to find out: have apps lost their luster? Since travelers can now book travel directly through platforms like Facebook Messenger and WhatsApp, are they suffering from travel app fatigue?

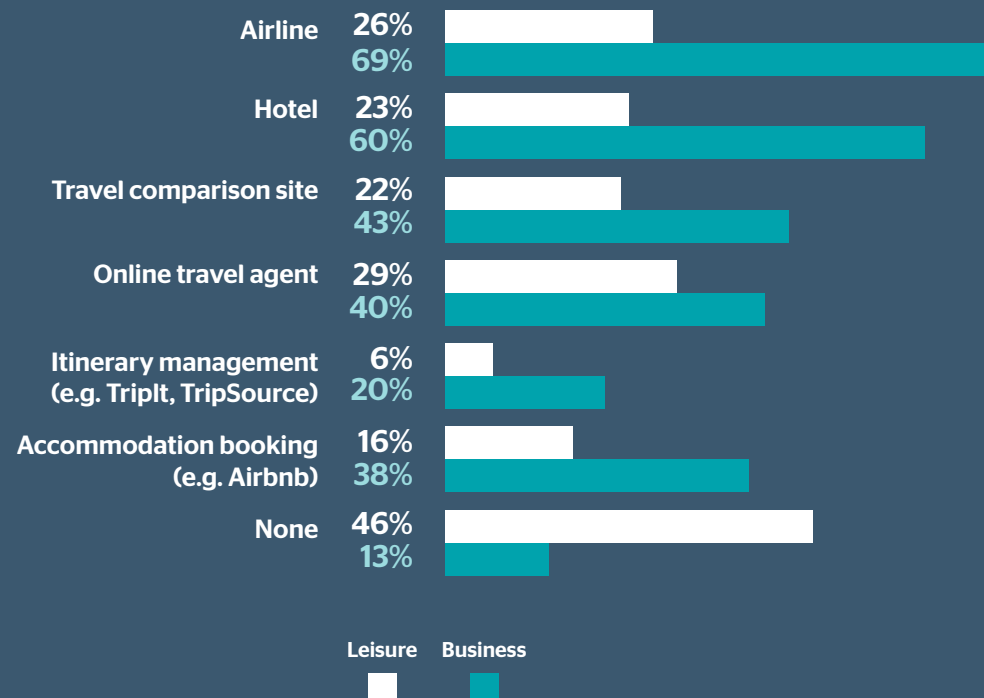The feedback we got was a resounding 'no'—in fact, travel apps are as popular as ever for today's leisure and business travelers. More than half of travelers have at least one travel app on their phone, and 78% are downloading either the same amount or more travel apps than last year. Travelers are also using these apps frequently, with almost half of business travelers using them daily or weekly.

Searching and booking travel, checking flight status, and getting a boarding pass are the primary reasons travelers are downloading travel apps. Business travelers also recognize the potential to avail of offers or promotions via apps, proving that this channel is still providing an unparalleled opportunity to engage with customers and drive revenue, through the one device they carry throughout their journey—their smartphone.

Categories of travel apps installed on travelers' smartphones

Category	Leisure	Business
Airline	26%	69%
Hotel	23%	60%
Travel comparison site	22%	43%
Online travel agent	29%	40%
Itinerary management (e.g. TripIt, TripSource)	6%	20%
Accommodation booking (e.g. Airbnb)	16%	38%
None	46%	13%

Leisure ☐   Business ◼

Reasons for downloading a travel app

To search for flights/accommodation
65%
59%

To book flights/accommodation
52%
52%

To check my flight status
38%
43%

To get my boarding pass
32%
16%

To avail of an offer/promotion
31%
37%

Keeps me updated with notifications)
31%
30%

To check-in to my hotel
23%
34%

Loyalty (to receive additional reward points etc.)
22%
33%

Feature only available on the app
8%
10%

It's my favorite travel app
7%
5%

Other
2%
2%

Leisure   Business

Are you downloading more or fewer travel apps than last year?

54% Same

22% Fewer

24% More
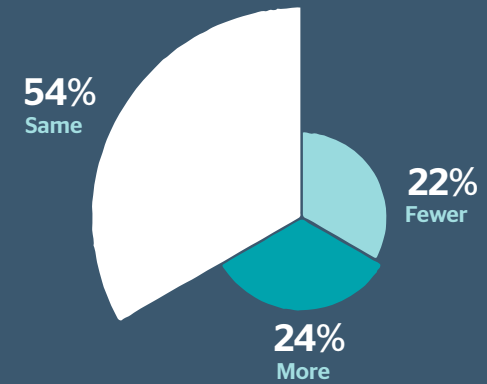
Travel app frequency of use

Leisure travelers
3% Daily
11% Weekly
42% Never
44% Monthly or less

Business travelers
10% Never
21% Daily
23% Weekly
46% Monthly or less
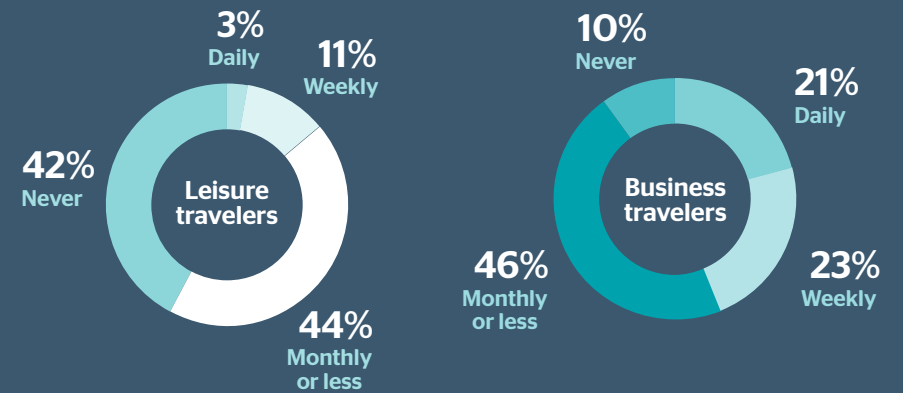
Channels used to search and book

Will 2019 be the year that mobile finally overtakes desktop for bookings? Our research shows that for some travelers, the gap is narrower than ever.

When it comes to searching and booking flights, desktop is still the preferred tool for leisure travelers, especially when paying for flights, with smartphone apps coming in second. However, for business travelers, desktop and travel apps are neck-and-neck, with the vast majority saying they use both tools to research and book flights.

While smartphone apps are rapidly gaining on desktop as travelers' preferred choice for booking, travel brands should also be aware of another channel gaining traction: social media. For the last few years, social media has been a useful resource for travelers to research and plan travel–but this year's research shows that more than half of business travelers have used social to actually make a booking.

This speaks to a greater trend that Travelport Digital has been talking about for the last few years—the importance of being where the customer is. The potential for travel brands to engage with customers and monetize through mobile has now extended beyond just apps or mobile websites—the most successful travel brands will go to where customers are on mobile, and one of the most obvious places to start is social media.

Preferred way to research a flight only

Smartphone app
68%
91%

Tablet app
47%
77%

Desktop
76%
90%

Mobile (no app)
62%
70%

Social media
39%
68%
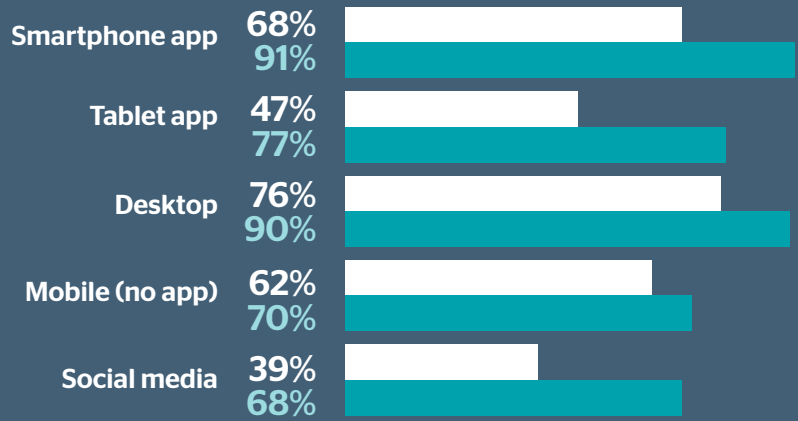
Preferred way to book/pay for a flight

Smartphone app
58%
85%

Tablet app
41%
72%

Desktop
74%
86%

Mobile (no app)
46%
66%

Social media
24%
59%
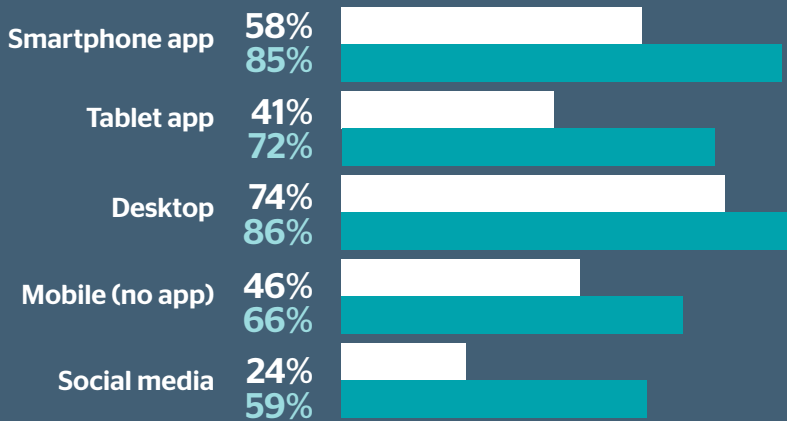
Preferred way to research/plan other parts of a trip (e.g. hotel, rail, car etc.)

Smartphone app
70%
89%

Tablet app
50%
79%

Desktop
78%
89%

Mobile (no app)
61%
77%

Social media
39%
69%

Leisure   **Business**
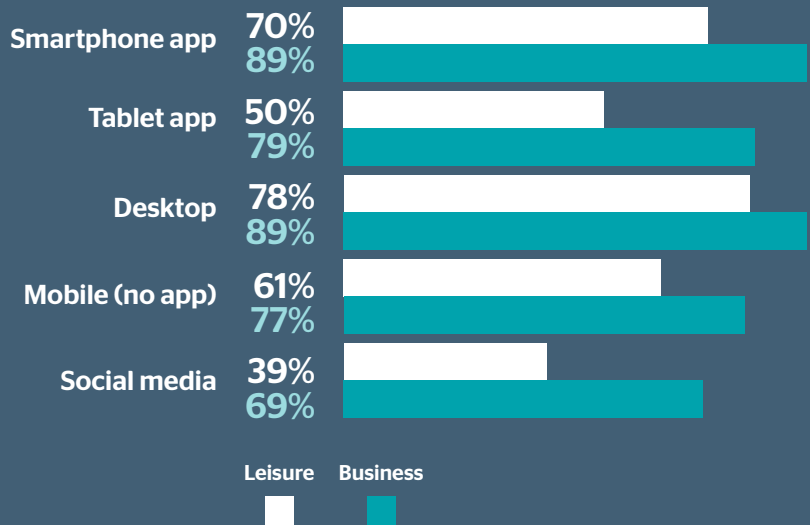
Apps versus mobile web for travel activities

KEY TAKEAWAY
Apps are the travelers' choice for almost every travel-related activity.

This year's end traveler survey saw round two in the battle of 'apps versus mobile websites' for completing travel-related activities, and once again native apps have come out on top. Leisure travelers say they prefer to use apps over mobile web for every travel activity, other than searching and booking in-destination activities and car hire. Business travelers prefer to use apps over mobile web for every travel-related activity.

The reasons travelers are choosing apps over mobile web comes down to the fact that they can do more through apps than they can through mobile web: get their boarding pass, check in, get relevant push notifications, and access what they need offline. Ease of use is also an important element, with 28% of travelers choosing apps because they save their preferences, payment details, and other personal information.

App or mobile web for travel-related activities

App

Activity	Mobile web
55% / 78%	Searching for a flight	45% / 22%
51% / 62%	Booking a flight	49% / 38%
51% / 71%	Searching for accommodation	49% / 29%
51% / 70%	Booking accommodation	49% / 30%
50% / 62%	Searching for discounts or offers	50% / 38%
58% / 66%	Checking into a flight	42% / 34%
58% / 60%	Generating a boarding pass	42% / 40%
54% / 62%	Purchase additional flight items (i.e. wi-fi, extra bag, priority boarding etc.)	46% / 38%
44% / 59%	Looking for car rental	56% / 41%
50% / 61%	Making a last-minute booking	50% / 39%
46% / 53%	Searching for things to do in destination	54% / 47%
48% / 58%	Booking things to do in destination	52% / 42%

Leisure ☐   Business ◼

13

Reasons for downloading an app over using mobile web

Reason	%
Features I like on app aren't available on mobile web (e.g. boarding passes, check-in, Apple wallet)	39%
I can receive updates on relevant notifications/offers	32%
I can use it without being connected to the Internet	31%
It stores my preferences/payment details personal information to make bookings easy	28%
Speed	27%
Better look and feel	23%
Reward/discount for downloading app	11%

App features that travelers value

The research shows that the main reason that travelers continue to turn to apps over mobile web is because apps can offer better features and functionality. So, we asked travelers to tell us what features were most important to have on a travel app. The message for travel brands is this: focus on getting the basics right.

Real-time flight alerts and seeing an entire trip itinerary in one place were the top picks among the respondents. These features even slightly overtook the ability to check in or search and book a flight in terms of importance for travelers.

As a travel brand, having the fundamental features in place, and designing them correctly, is critical to the success of your app. While Apple Pay is useful for customers, if you're not sending the right push notifications or allowing travelers to see their full itinerary in one place, you're ultimately not delivering what they want on a basic level.

For those travel brands looking to boost ancillary revenue, there's good news— more than half of travelers (57%) want the ability to add extras to their bookings like wi-fi, extra bags or priority boarding.
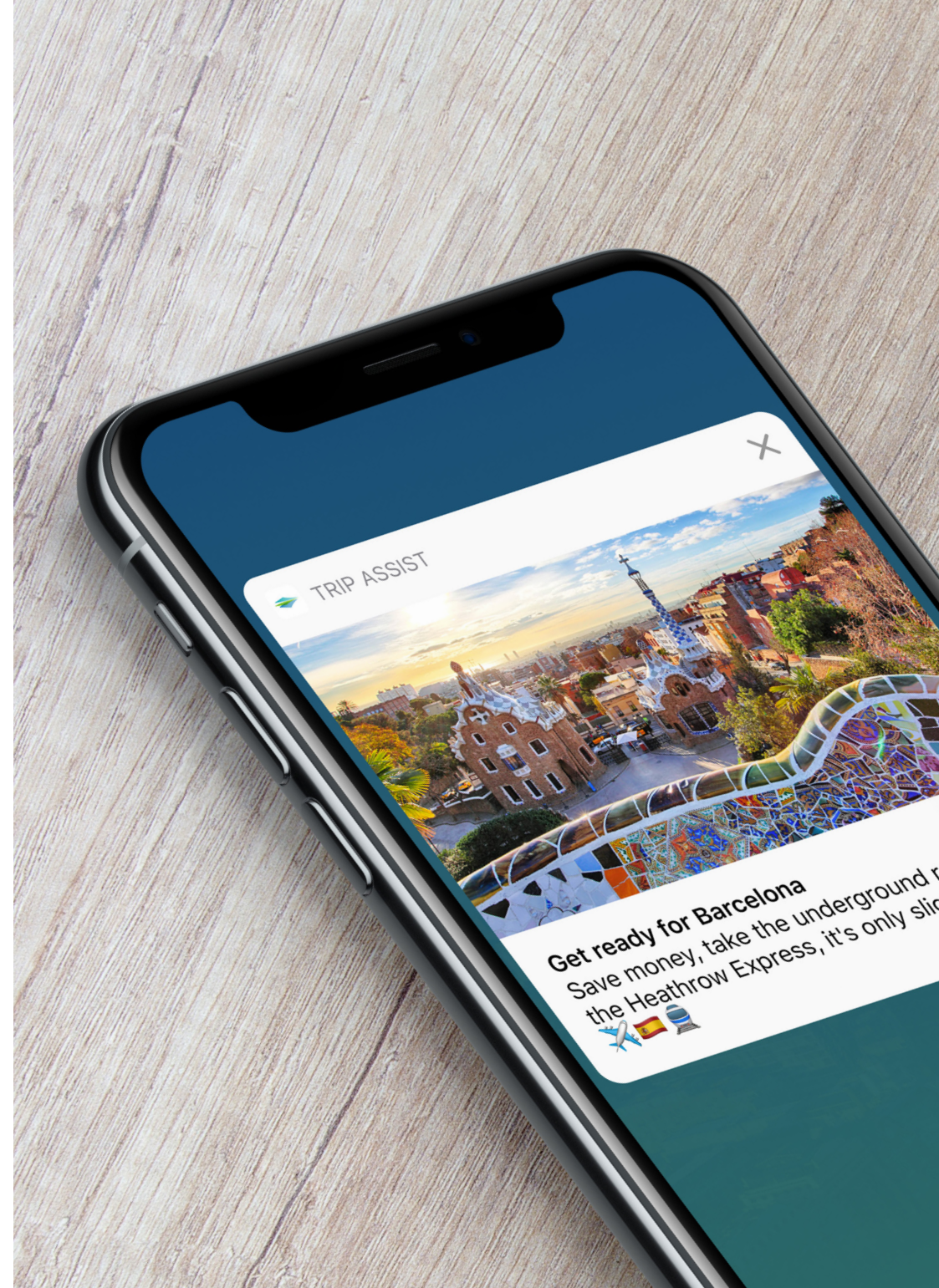
Features deemed 'important' to have in a travel app

Feature	%
Seeing trip itinerary in one place	66%
Real-time flight alerts throughout your journey	66%
Ability to search & book flights	65%
Mobile check-in	64%
Ability to book a hotel room	62%
Ability to change flight from within the app	61%
Ability to add extras to your booking on the go (wi-fi, extra bag, priority boarding etc.)	57%
Things to do at local destination	56%
Loyalty programs	55%
Booking airport transfer	54%
Airport maps	53%
Ability to book a car rental	51%
Personalized travel offers	49%
Live chat with a travel representative	47%
Credit card scan	45%
Ability to pay using Apple/Android pay (Touch ID)	44%

# What makes travelers download (and keep) a travel app?

KEY TAKEAWAY
App store ratings will make or break your app—a third of travelers are influenced by ratings when choosing to download an app.

As every travel brand with an app knows, getting users to download it can be a challenge and involves rigorous launch planning and marketing—and that's only half the battle. Getting people to use your app and not uninstall it after a trip can be a struggle, especially with so much competition in the market.

Traveler feedback, however, brings good news for travel brands. App loyalty is strong, with 66% of travelers saying they've never stopped using or deleted a travel app once they've downloaded it. Of those who have, the primary reasons were because they only needed it for one specific trip, or it was taking up too much space on their phone.

This shows the importance for travel brands to show users the real value of their app, beyond just a 'one-trip' necessity. Apps take up precious phone storage, so users need to see the value they're getting in return. Whether that's promotional offers or new features, travel brands need to consistently sell the benefits of their app to users to maximize retention rates.

Have you ever stopped using/deleted a travel app?
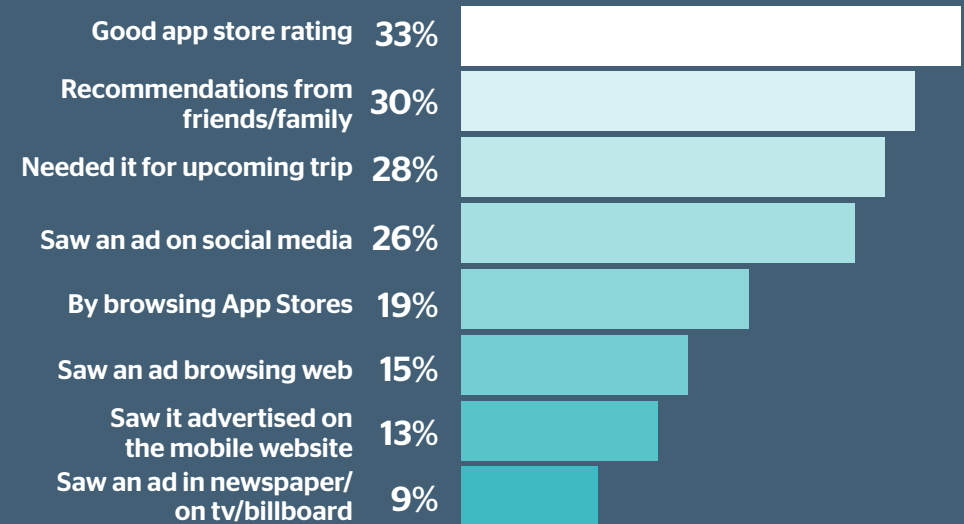
NO
66%

YES
34%
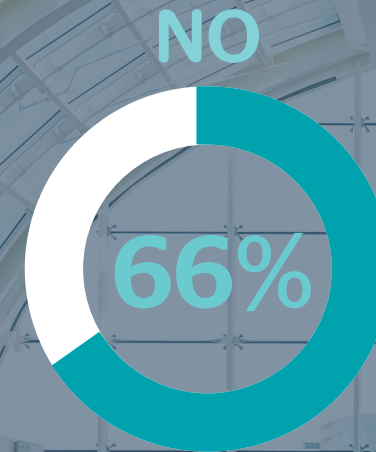
What makes a traveler download an app?

We know what makes users retain or uninstall an app, but what drives them to download it in the first place? App stores are vast and cluttered places, so how can travel brands stand out from the crowd? Our research found that it all comes down to the app store ratings.
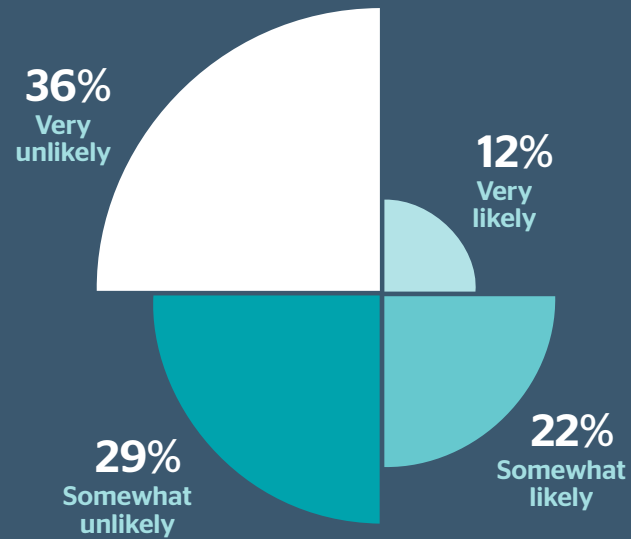
Word of mouth can make or break your app. One-third of end travelers said that a good app store rating is the primary driver for downloading an app, with 'recommendations from friends/family' coming in second.

The best way to ensure you're getting great feedback is to give people something to shout (positively!) about. Creating a great user experience will not only drive app downloads and boost retention rates, travelers also tell us that it directly affects whether they'll book with your travel brand again. 65% of travelers would be unlikely to book with a travel brand again if they had a bad experience in their app.

Reasons for downloading favorite travel app

Reason	%
Good app store rating	33%
Recommendations from friends/family	30%
Needed it for upcoming trip	28%
Saw an ad on social media	26%
By browsing App Stores	19%
Saw an ad browsing web	15%
Saw it advertised on the mobile website	13%
Saw an ad in newspaper/ on tv/billboard	9%

How likely would you be to book with a travel brand again if you had a bad user experience on their app?

36% Very unlikely

12% Very likely

22% Somewhat likely

29% Somewhat unlikely

Reasons for deleting a travel app

7% It needed to be updated too many times

4% Other

8% It didn't have the features I needed

30% Takes up too much space on phone

10% I was receiving too many notifications

15% It was hard to use/navigate

26% I only needed it for one specific trip
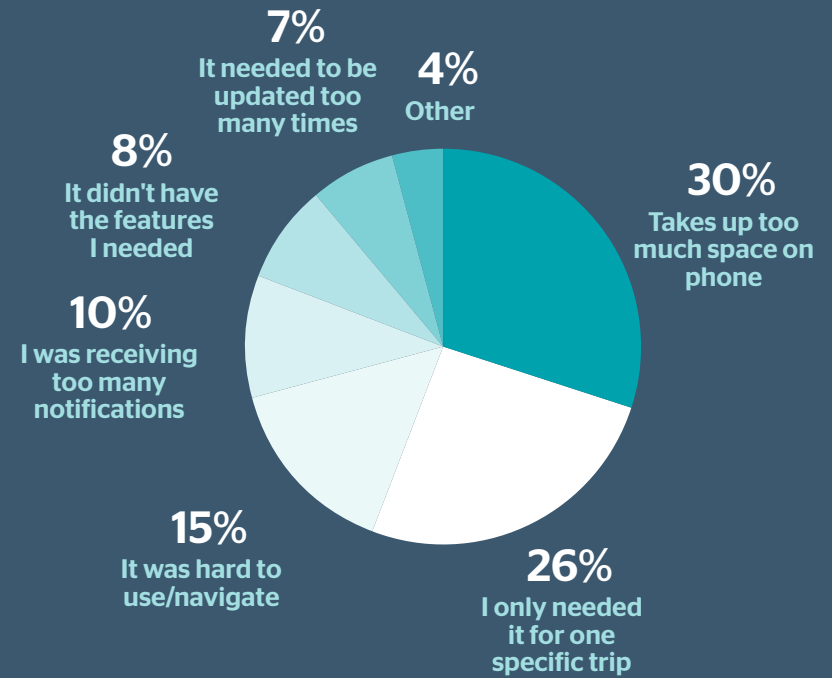
How travelers are using voice and chat to enhance the experience

KEY TAKEAWAY
It's not enough to just have an app. Prepare to engage with travelers across every platform they're on, through the methods they choose.

Up to this point we have looked primarily at apps, but of course mobile usage extends to many other areas. Conversational interfaces—namely, chatbots and voice assistants—are now redefining the mobile experience, so we wanted to find out how people are using these emerging areas when they travel.

Our research found that while adoption is by no means universal among travelers, conversational interfaces are making strides, with business travelers most likely to turn to chatbots and voice assistants to manage their trips.
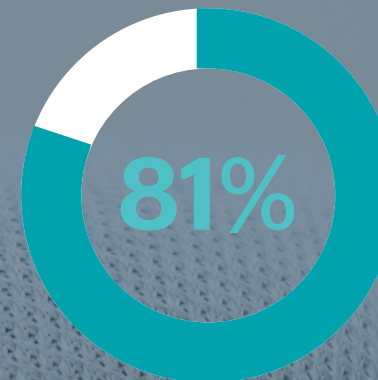
Voice

The rise of voice technology over the last number of years has been phenomenal, with voice assistants like Amazon's Alexa, Google Home and Apple's Siri changing the game for how we search for information.

A staggering 81% of business travelers have used voice assistants during a trip, and 77% say they use voice assistants more than once a day or at least once a week. Leisure travelers are not as active, although a significant 41% said they use voice assistants more than once a day or at least once a week. These are figures that travel brands can't afford to ignore.

Travelers who have used voice assistants during a trip

BUSINESS

81%

LEISURE

34%
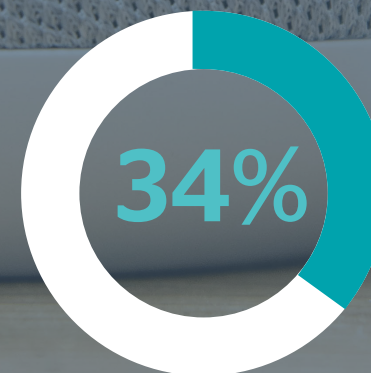
When asked what kinds of queries people would like to use if the voice functionality was available to them the top answer was consistent among business and leisure travelers: check flight status, followed by check-in. This shows travelers' desire to use voice to remove friction points in their journey and make core travel touchpoints as easy as possible. It also speaks to a bigger trend in voice technology: as users, we're moving from using voice to simply search for an answer, to asking voice assistants to complete an action for us—i.e. to check us in.
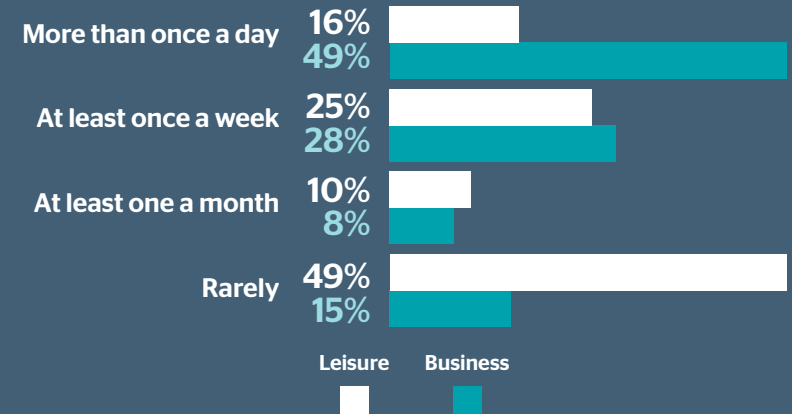
Live chat and messaging

Communication with travel brands (or lack thereof) along the journey can be a cause of friction for travelers, especially during times of disruption. 66% of business travelers and 48% of leisure travelers tell us that it's important to have live chat within their travel app.

That being said, traveler awareness of chat capabilities is relatively low across mobile, particularly among leisure travelers. Only 25% of leisure travelers have ever seen the option to chat with a travel brand via social messaging like Facebook Messenger, and 14% via voice messaging. Business travelers are more aware of these options, although there is a clear opportunity for travel brands to capitalize on their presence across these channels and promote them more broadly.
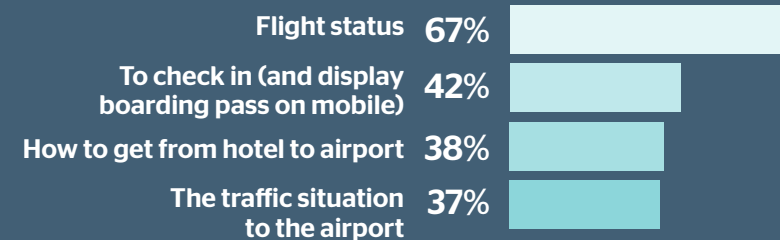
66% of business travelers are also using chat platforms to research and book trips. This shows once again that these conversational platforms are moving beyond the basic 'question and answer' premise, to actually allowing users to complete transactions and offering travel brands another opportunity to create real revenue growth potential.

Travelers who find live chat important in the overall app experience

48%
LEISURE

66%
BUSINESS

How frequently do you use voice assistants in your day-to-day life?

More than once a day
16%
49%

At least once a week
25%
28%

At least one a month
10%
8%

Rarely
49%
15%

Leisure   Business

What travelers would like to ask using voice, if functionality was available

Flight status 67%

To check in (and display boarding pass on mobile) 42%

How to get from hotel to airport 38%

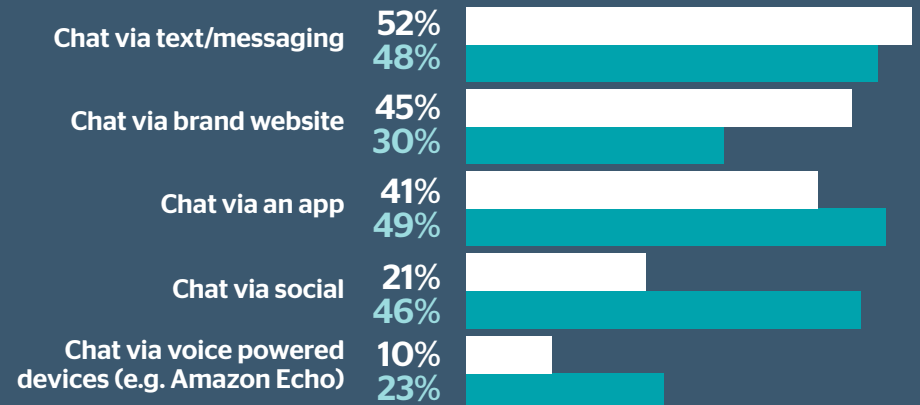**The traffic situation to the airport** 37%

Travelers who have researched or booked a trip with a travel brand using a chat platform (e.g. Facebook Messenger, WhatsApp, WeChat, Agent chat)

26%
LEISURE

66%
BUSINESS

Travelers who are aware of options to chat with a travel brand via...

	Leisure	Business
Social messaging (e.g. Facebook messenger)	25%	52%
Chat messaging (e.g. WhatsApp)	27%	55%
Voice messaging (e.g. Alexa, Amazon Echo)	14%	39%
I am not aware of any of the above	54%	18%
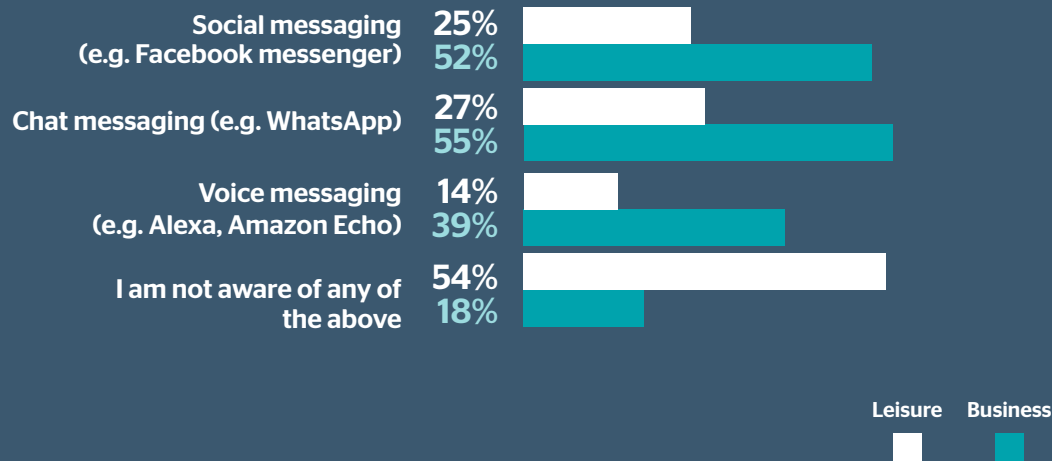
Leisure ☐   Business ☐

How travelers expect to be able to communicate with travel brands/airlines

	Leisure	Business
Chat via text/messaging	52%	48%
Chat via brand website	45%	30%
Chat via an app	41%	49%
Chat via social	21%	46%
Chat via voice powered devices (e.g. Amazon Echo)	10%	23%

Travelers' communication preferences

KEY TAKEAWAY
Push is travelers' preferred communication channel during times of disruption.

Traveler communication is a delicate balance. Too frequent and you risk app uninstalls or email unsubscribes. Too seldom and you're not engaging with your customer enough to provide real value. Aside from frequency there are other considerations, like what channel is best? How can you get your message to them during travel disruptions?

The key to great travel communication is relevant, personalized and contextual messages, delivered through the channels travelers are using most. Travelers tell us that push notifications are the primary way they expect travel brands to communicate with them during times of disruption, with more than half of respondents expecting to be communicated to through this channel. 46% of business travelers also expect to find information on social media, followed by chat on mobile (40%).

On the day of travel, push notifications come out on top too, with around half of business and leisure travelers expecting to find information relating to trip disruptions through this channel.

Push is a particularly relevant channel for business travelers, with 85% of them having notifications enabled on their travel apps. Across the board, travelers are more open to receiving this type of messaging: there is a 10% increase in travelers activating push notifications on travel apps compared to last year, and a 22% increase in travelers finding push notifications useful.

Travelers with push notifications activated on travel apps

53%
LEISURE

85%
BUSINESS

GS

16:00
Monday, 2 July

now

TRIP ASSIST

Flight delay
Your flight EX132 to Barcelona is delayed until 19:45

Upselling and promotional offers

While travelers tell us that the push notifications they find most useful are related to trip status, 70% also said that they want flight price alerts through this channel. 66% said reminders of bookings in progress were welcome notifications, while more than half of travelers are open to receiving messages relating to travel offers or promotions.

When it comes to communicating offers, email is still the preferred channel for both business and leisure travelers, with push notifications coming in second. Unsurprisingly travelers are far less receptive to ads on websites or social media. The good news for travel brands is that only 3% of respondents said they don't like being communicated to at all for offers or updates.
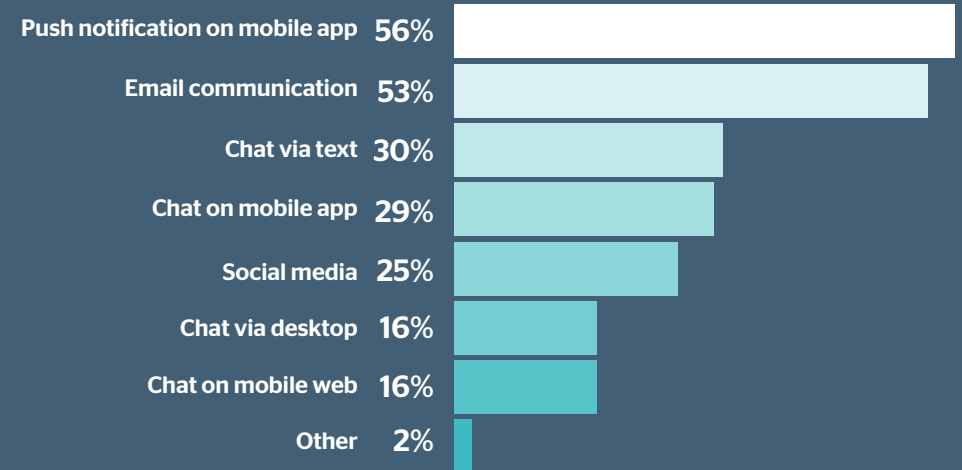
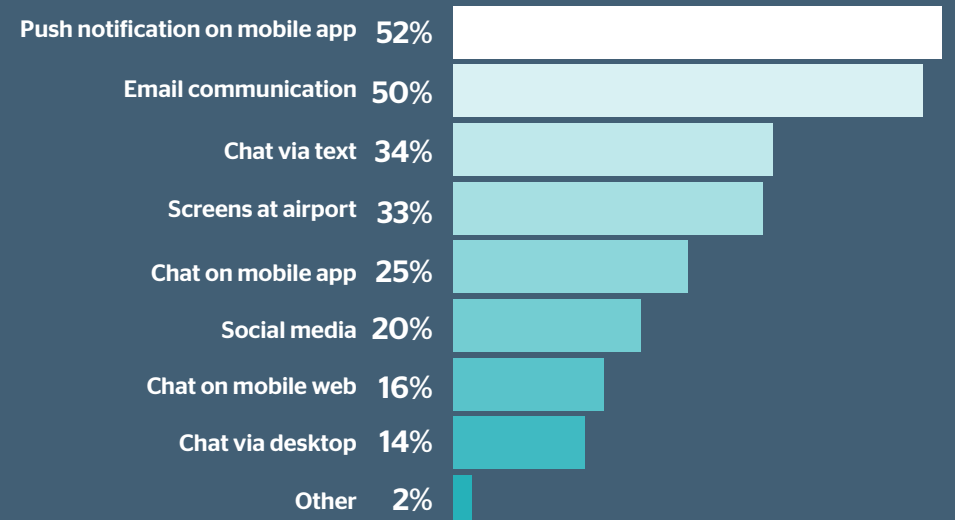### Travelers who find travel push notifications useful

73% LEISURE **89%** BUSINESS

Where travelers expect to find information on disruptions....

...before check-in

Push notification on mobile app	56%
Email communication	53%
Chat via text	30%
Chat on mobile app	29%
Social media	25%
Chat via desktop	16%
Chat on mobile web	16%
Other	2%

...on day of travel

Push notification on mobile app	52%
Email communication	50%
Chat via text	34%
Screens at airport	33%
Chat on mobile app	25%
Social media	20%
Chat on mobile web	16%
Chat via desktop	14%
Other	2%

Trip notifications deemed useful

Notification	%
Trip status (e.g. flight delayed, check-in time)	76%
Price change of a flight you're looking at	70%
Reminder of a booking/purchase in progress	66%
Travel offers or promotions	53%
Loyalty points update	50%
Upgrade to the app itself (e.g. new feature added)	49%
New product or service available	43%
Recommendation of a product/service	40%
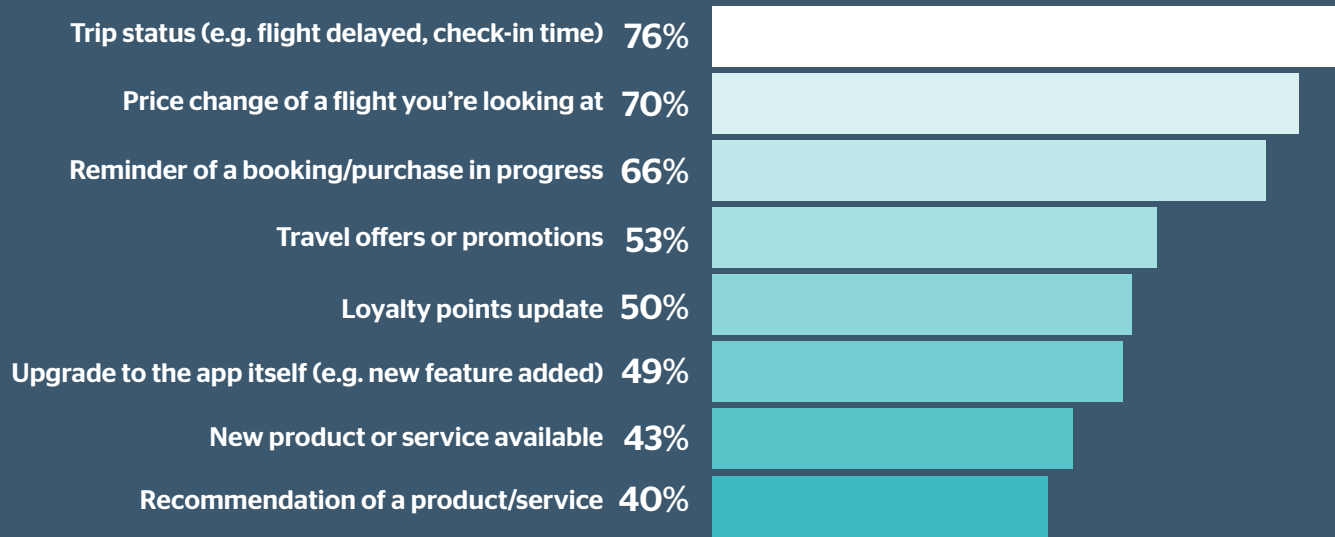
Traveler communication preferences for offers/updates

- 3% I don't like to be communicated to at all
- 4% Ads on social media
- 5% Ads on website
- 19% SMS/Text message
- 46% Email
- 22% Notification/Alert on my mobile
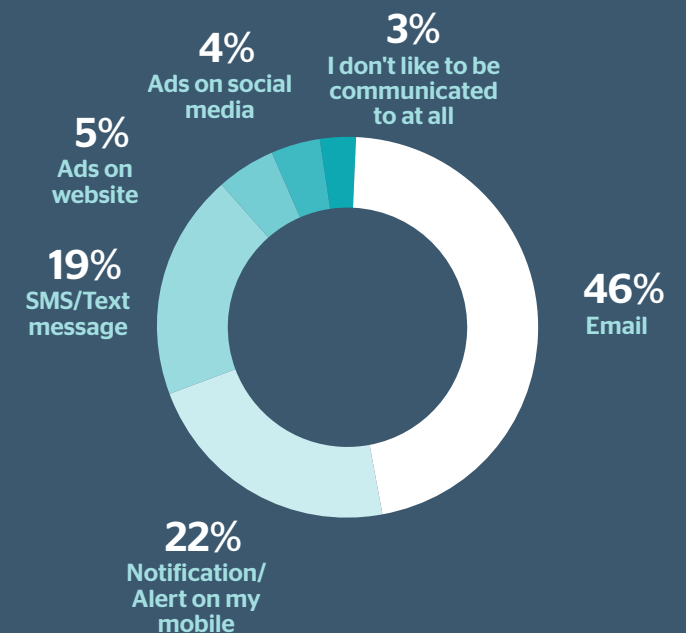
Mobile presents big opportunity to drive ancillary revenue

KEY TAKEAWAY
People want to buy ancillaries via mobile, so make sure your platform is optimized to sell.

With 74% of travel brands citing 'revenue generation' as key goal of their mobile strategy, selling ancillaries via mobile is a top priority for many travel brands.
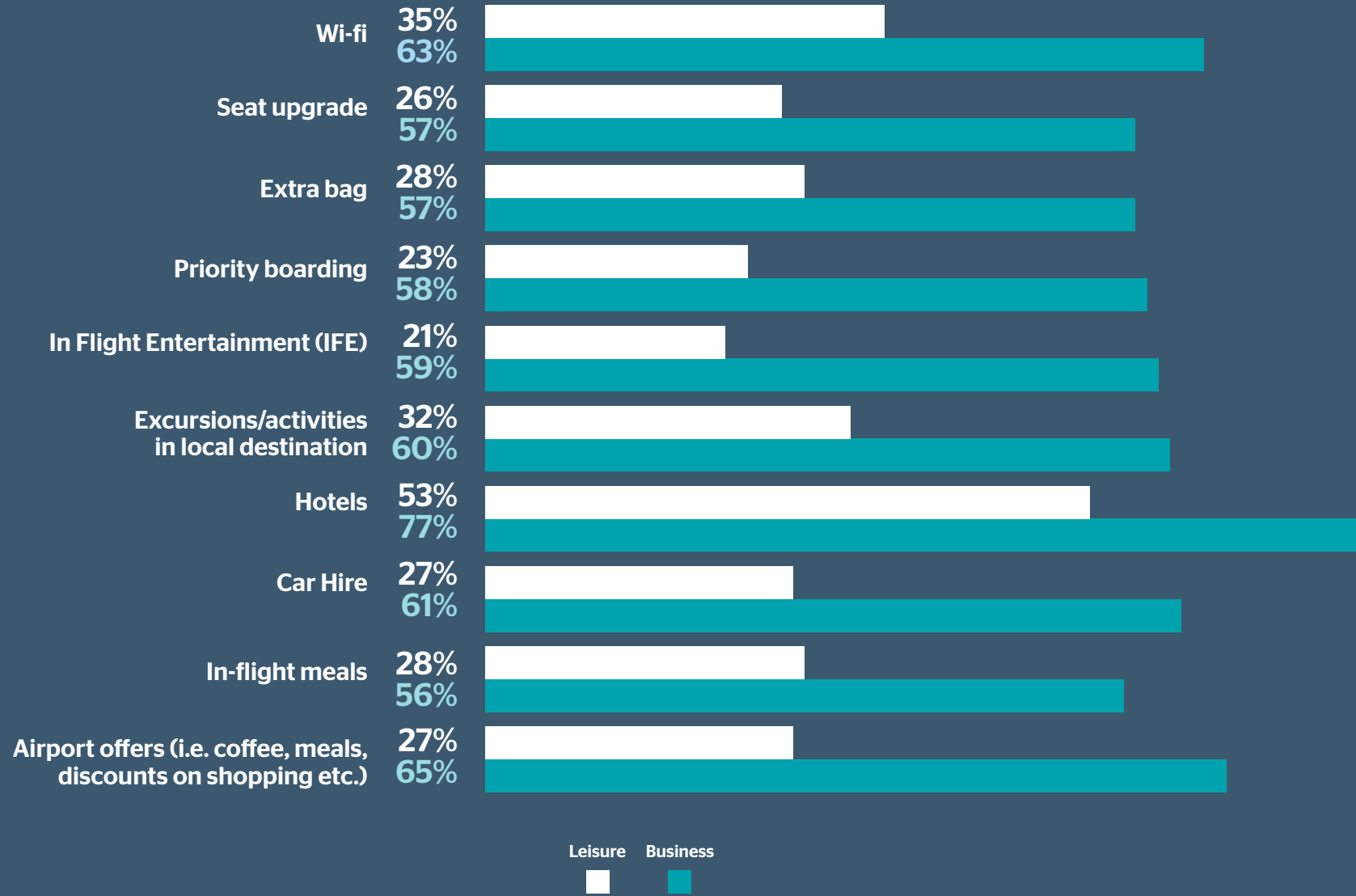
The good news is that travelers are open to buying ancillaries via mobile. Compared with Travelport Digital's 2017 research, travelers are now buying more seat upgrades, extra bags, in-flight entertainment, and car hire through mobile channels. Over a quarter of respondents have also bought wi-fi, airport offers, in-destination activities, and priority boarding on their smartphone.

However, it's hotels that are leading the way. 56% of travelers said that they had booked a hotel room on mobile (an increase of 6% on last year) and 62% rated hotel booking as an important travel app feature. This gives airlines and travel brands a clear opportunity to increase hotel attachment rates, and ultimately revenue, through their app.

When it comes to business travelers, they are far more likely to buy ancillaries through mobile. As many as 77% have booked hotels via mobile and 63% have bought wi-fi. 59% used their smartphone to buy in-flight entertainment, 57% bought seat upgrades and extra bags, and 60% booked excursions or activities in local destinations. In fact, more than half of business travelers had bought at least one category of ancillary on mobile.

What travelers have bought on mobile

Category	Leisure	Business
Wi-fi	35%	63%
Seat upgrade	26%	57%
Extra bag	28%	57%
Priority boarding	23%	58%
In Flight Entertainment (IFE)	21%	59%
Excursions/activities in local destination	32%	60%
Hotels	53%	77%
Car Hire	27%	61%
In-flight meals	28%	56%
Airport offers (i.e. coffee, meals, discounts on shopping etc.)	27%	65%

Leisure   Business

Business travelers are mobile-first

KEY TAKEAWAY
Business travelers are rapidly adopting new mobile tech, and their expectations of travel brands are rising.

While mobile usage across the board is on a constant incline, among business travelers it has become their indispensable travel assistant. From searching and booking, to day-of-travel support and in-destination activities, business travelers rely on their smartphones to complete almost every travel transaction.

They are the most frequent users of travel apps, with almost half using them daily or weekly. 87% of business travelers have at least one travel app installed; they're using apps to search, book and manage their trips and they expect a wholly mobile travel experience. They are more likely to buy ancillaries over mobile than other traveler group, particularly hotels, wi-fi, in-airport offers, and car hire.

When it comes to app features, business travelers have similar needs to leisure travelers, however the ability to see the entire trip itinerary in one place and the ability to chat with a travel rep are features that business travelers see as critical. Business travelers are the early adopters when it comes to emerging technology like voice or chat. 66% have researched or booked trips using chat platforms and feel that live chat is important to the overall app experience. They also have higher expectations of travel brands than leisure travelers; almost half not only want to communicate with brands via chat channels—they expect it.

That being said, despite a high level of engagement with mobile tech, business travelers are more likely to delete or stop using an app if they're unhappy with the experience. 45% have deleted a travel app, and 21% of those did so because it was difficult to use. For travel brands, it's essential to deliver a seamless user experience—this group are crying out for the best mobile experience possible, and they're prepared to spend their money with the brands who can offer it.

Industry take

Survey overview

Format: 15 questions

Sample size: 100+ respondents

Date: November 2018

Market: 6 continents

Overview

Our end traveler research paints a detailed picture of how the market is using mobile when they travel. However, this is just one side of the mobile travel story. We also wanted to see how travel brands are responding to traveler behavior, so we interviewed over 100 industry professionals on their mobile strategies for 2019.

This section of the report shows our findings, segmented by airlines and other travel brands. Our 'other travel brands' category groups findings from travel management companies, online travel agents, travel agencies, and 'other'. By segmenting the data in this way, we're showing which trends are more specific to airlines or other travel brands, and which are universal across the travel industry.

Key findings

100% of airlines and travel brands feel having a mobile strategy is important to the future success of the organization—although 38% of airlines and 72% of other travel brands feel they aren't investing enough in mobile.

Most airlines and travel brands will increase their mobile investments in 2019.

Business intelligence/predictive analytics is a core area of focus for 80% of airlines and 60% of other travel brands.

40% of airlines/travel brands will invest in voice technology in 2019.

Revenue generation tops the list of mobile goals, while 'being where the customer is' is seen as lower on the list of priorities for the travel industry.

Which type of organization do you work for?

32% Airline

15% Other

23% Travel Management Company

7% Online Travel Agent

24% Travel Agency
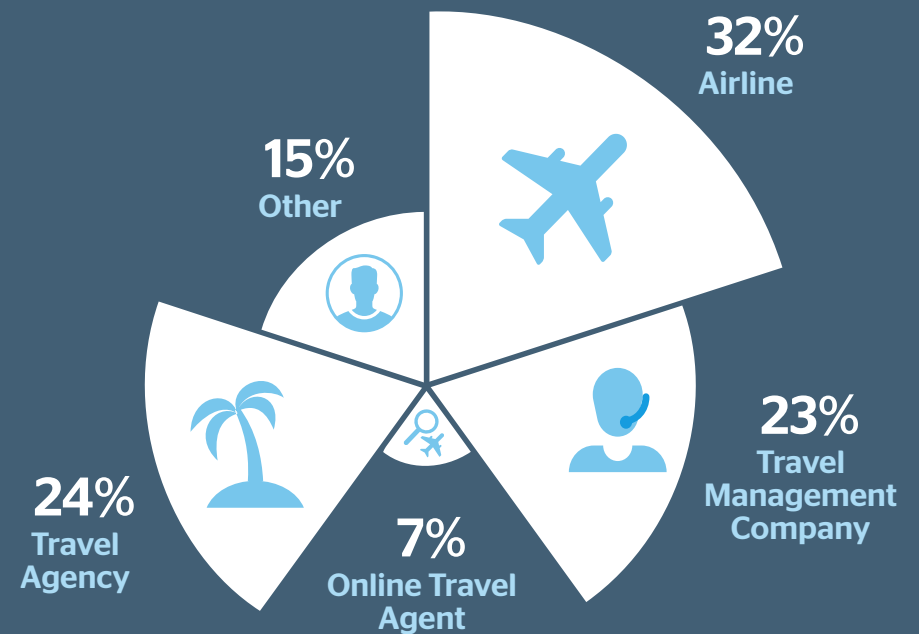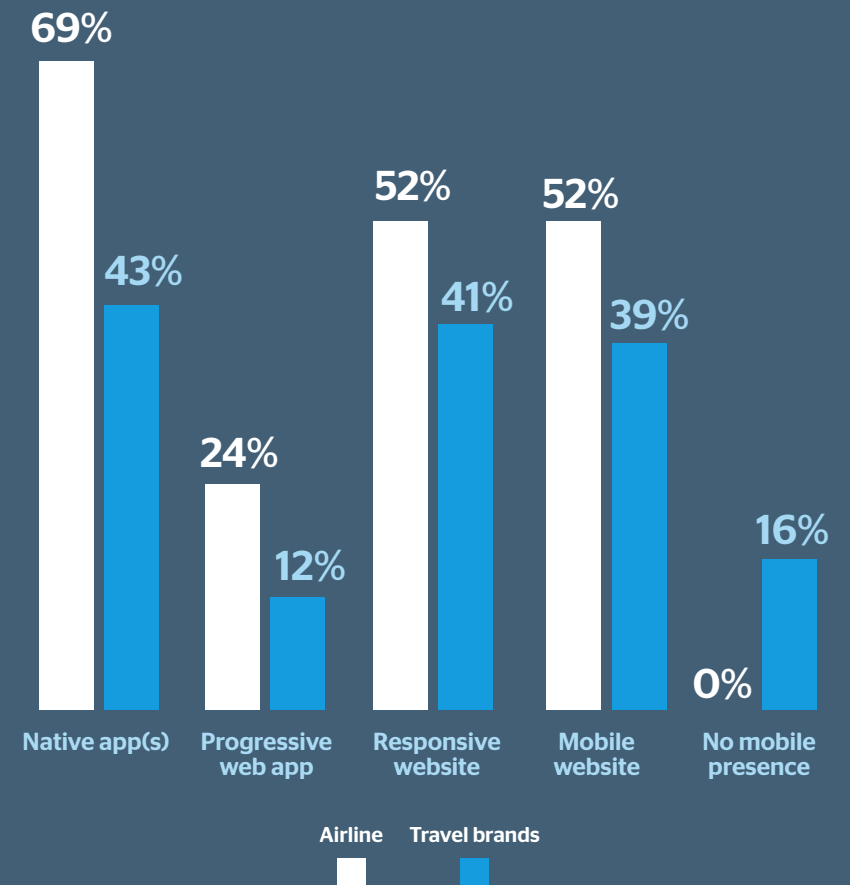
Mobile strategy is key to business success

It's unsurprising to find that mobile strategies are now firmly at the heart of business plans across the travel industry.

When we conducted our industry research last year, just 8% of all travel brands felt that having a mobile strategy wasn't important to the future success of their organization. This year, every single respondent agreed that having a mobile strategy is key for business success.
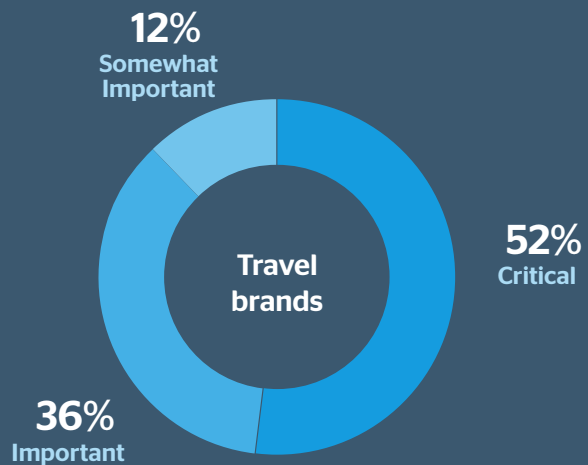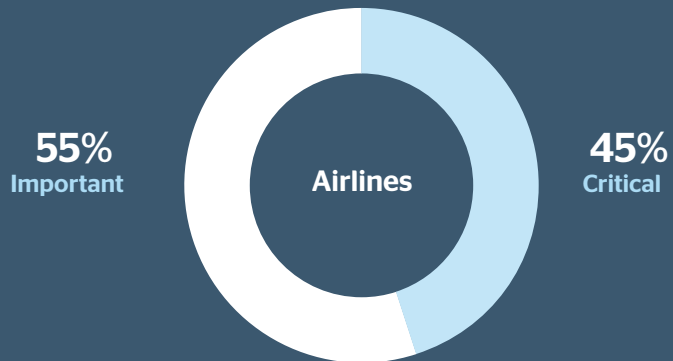
When we take airlines out of the equation and look to just other travel brands, 88% describe having a mobile strategy as 'critical' or 'important' and the remaining 12% say it's 'somewhat important'. However, despite recognizing its importance, 16% of other travel brand respondents say that mobile isn't part of their business's strategy.

Of those travel brands who do have a mobile presence, the most common form is a native app—69% of airlines and 43% of other travel brands say their business has an app. This marks a 9% increase overall in travel industry brands reporting having a native app since we conducted our research last year.

Category	Airline	Travel brands
Native app(s)	69%	43%
Progressive web app	24%	12%
Responsive website	52%	41%
Mobile website	52%	39%
No mobile presence	0%	16%

Airline   Travel brands

How important is having a mobile strategy to the future success of your organization?

Airlines

55% Important

45% Critical

Travel brands

12% Somewhat Important

52% Critical

36% Important

Which of the following most accurately reflects your mobile strategy for 2019?

0% / **16%** We don't have an app and mobile is not part of our strategy

14% / **30%** We don't have an app and want to build one

0% / **7%** We have an app and plan to keep it as is

76% / **39%** We have an app and want to enhance what we have

10% / **8%** We have an app but we want to replace it

Airline ☐ Travel brands ◼
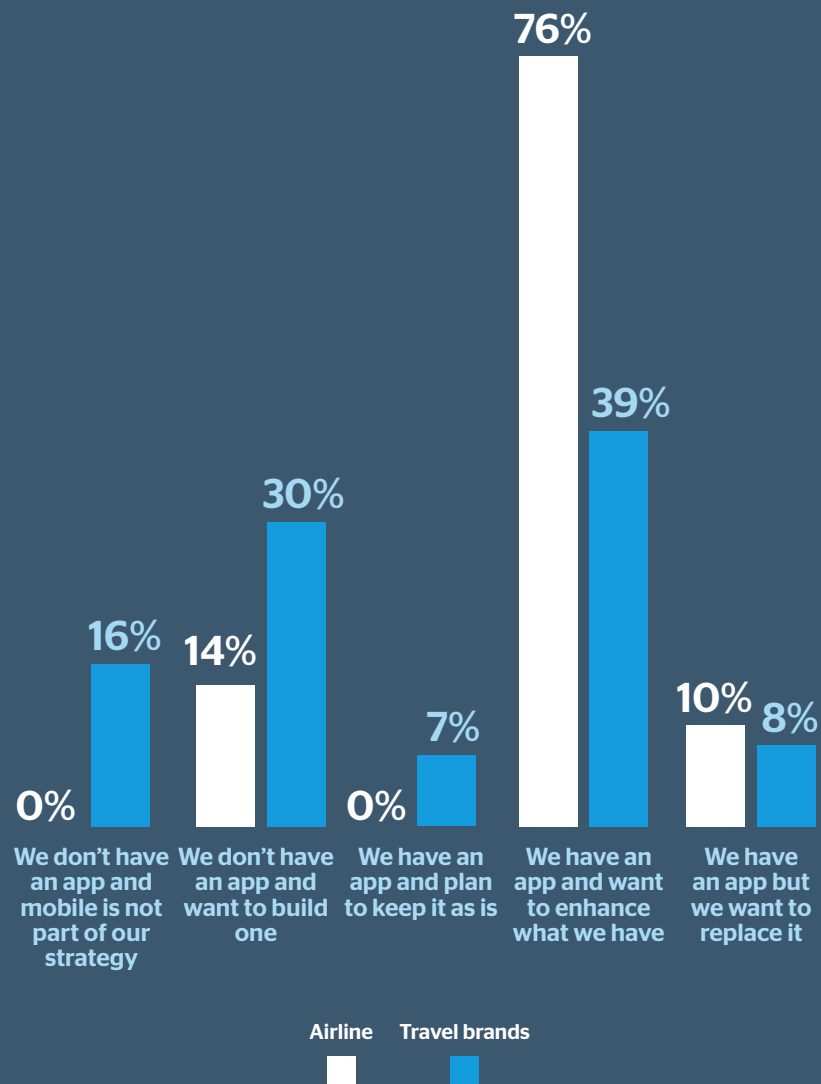
Where the travel industry is investing in 2019

Given that traveler mobile usage is at an all-time high, one of the most surprising findings of our research shows that 72% of travel brands feel they are not investing enough, or at all, in mobile.
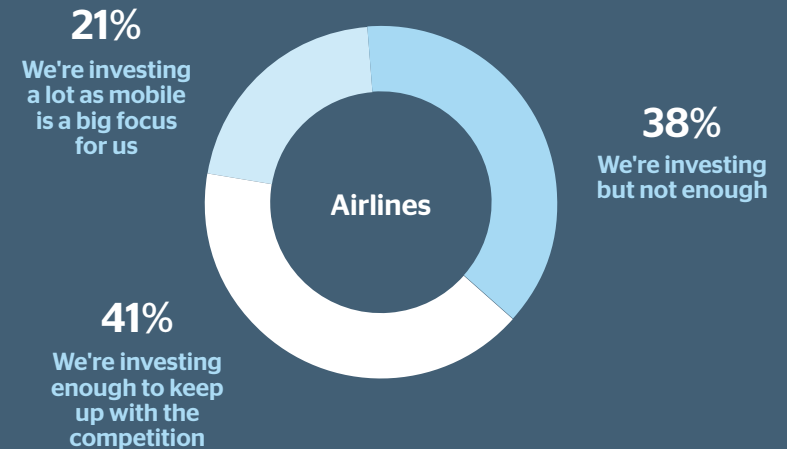
This is a significant disconnect, however it's one that brands are recognizing with the vast majority planning to increase their mobile investments in 2019.

Looking more specifically at the areas of mobile in which airlines and travel brands are investing, business intelligence/predictive analytics is a priority. In fact, there is a 21% increase in brands investing in this area since last year, showing a marked effort across the industry to not only focus on investing in new technologies, but to drive business forward through data. This points to how the industry is moving from digitization to datafication, a trend explored in more depth in our Mobile Travel Trends 2019 report.
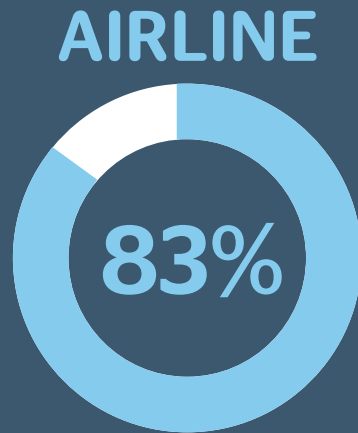
With travelers increasingly using conversational platforms like voice and chat to manage their trips, airlines are adjusting their investment strategies to respond to this trend. More than half will invest in chatbots in 2019 and 40% plan to invest in voice technology. Visual search and virtual reality (VR) will be less of a priority for airlines this year, with 16% investing in these areas.

Augmented reality (AR) has quickly found its feet in the travel industry, particularly among airlines, with some major carriers introducing AR baggage sizers via mobile. 28% of airlines will invest in AR in 2019, although other travel brands see less value in this area with just 9% investing. That being said, other travel brands see more value in investing in VR over AR, and with 23% investing, we may see some innovations in this space into 2020.

How do you feel about your organization's level of investment in mobile?

Airlines

21% We're investing a lot as mobile is a big focus for us

38% We're investing but not enough

41% We're investing enough to keep up with the competition

Travel brands

23% We aren't investing in mobile at all

49% We're investing but not enough

15% We're investing a lot as mobile is a big focus for us

13% We're investing enough to keep up with the competition

Organizations who intend to increase their investment in mobile in 2019

AIRLINE

83%

TRAVEL BRANDS

77%
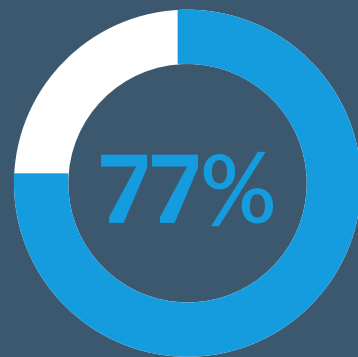
Do you intend to invest in any of the following areas of mobile in 2019?

Area	Airline	Travel brands
Voice	40%	40%
BI (predictive analytics)	80%	60%
Chatbots	56%	40%
AR	28%	9%
Virtual assistants	32%	29%
Visual search	16%	20%
VR	16%	23%

Airline ☐ Travel brands ☐
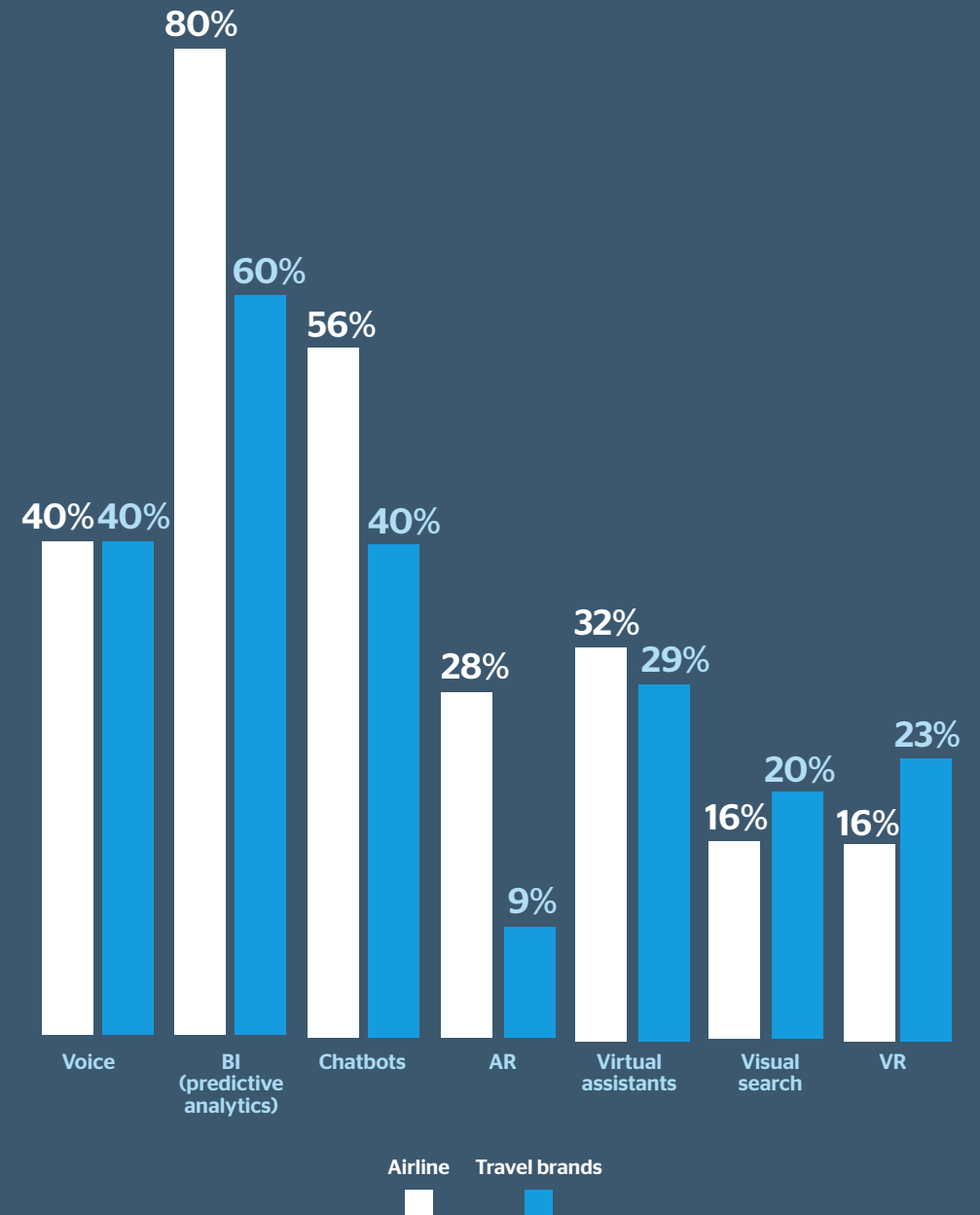
Mobile goals for 2019

It won't come as a surprise to see 'revenue generation' and 'customer service' top the list of mobile goals deemed importan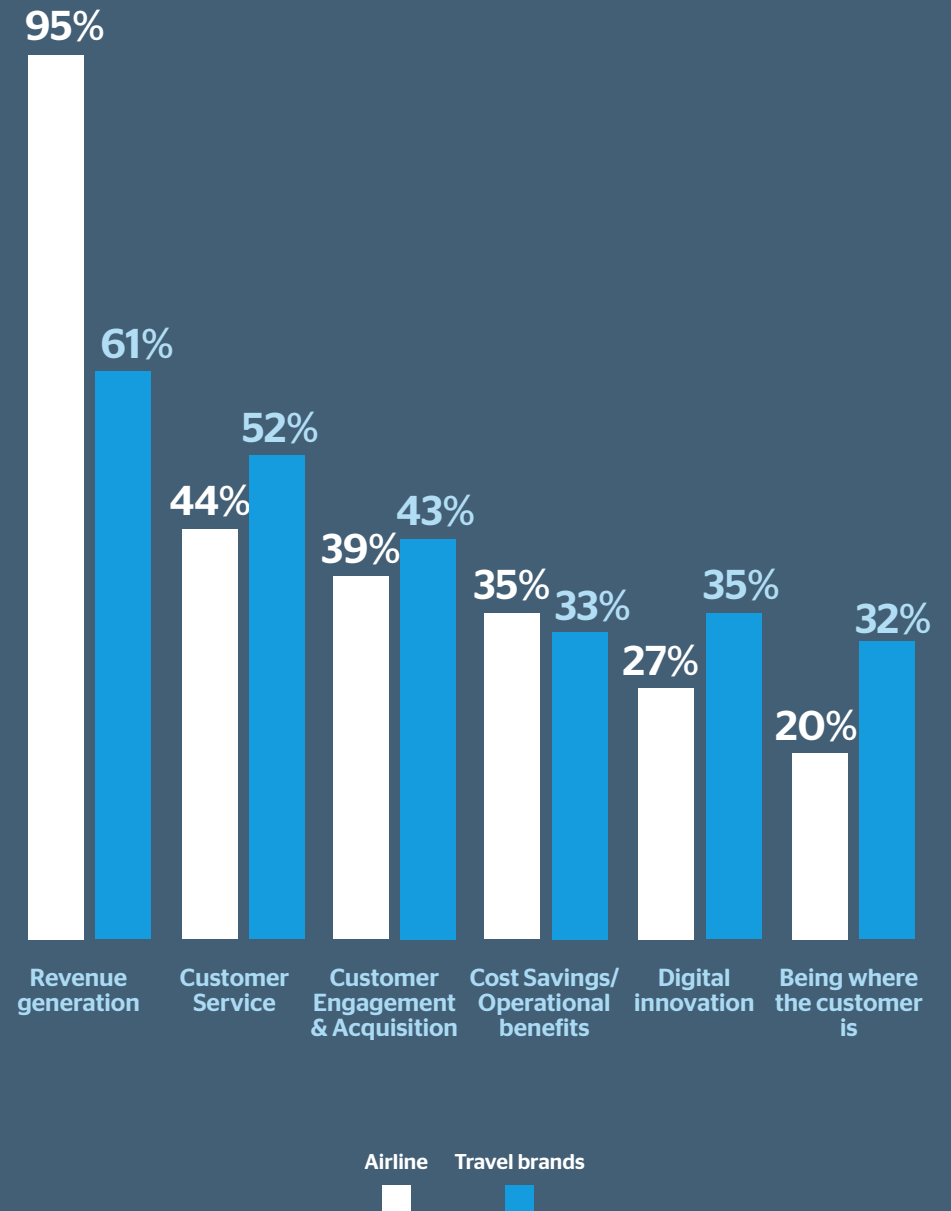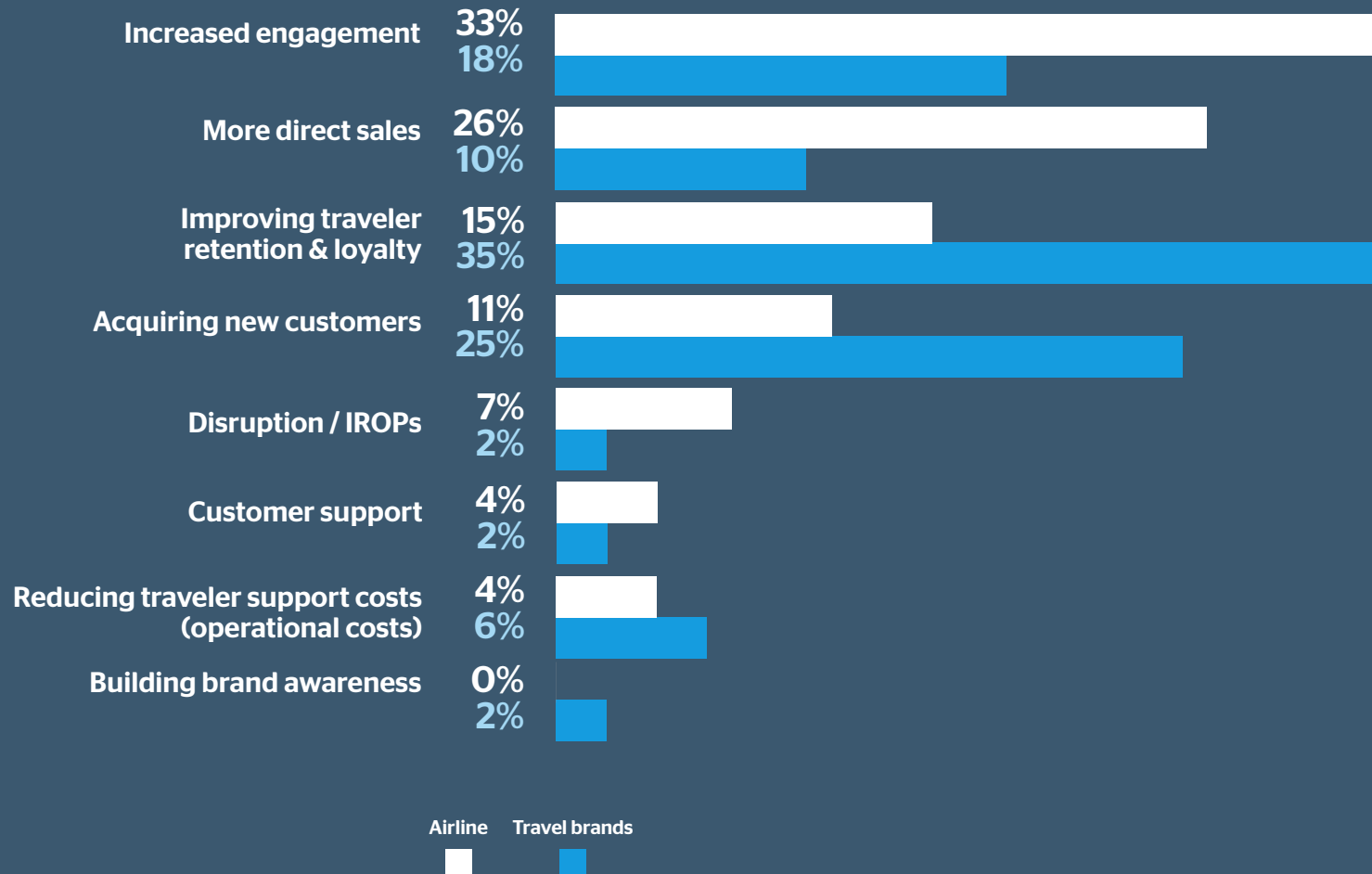t by both airlines and travel brands. However, what is surprising is that 'being where the customer is' is not seen as a priority by most brands across the board.

Research shows that travelers are now open to booking through multiple platforms including social media, voice and chatbots. They also expect to be able to converse with travel brands via chat messaging. This shows a contradiction between where traveler behavior is moving and where the industry is focused— and if revenue generation is a core mobile goal, then going to where the customer is on mobile should be a priority for both airlines and travel brands.

Mobile goals deemed 'important'

	Airline	Travel brands
Revenue generation	95%	61%
Customer Service	44%	52%
Customer Engagement & Acquisition	39%	43%
Cost Savings/ Operational benefits	35%	33%
Digital innovation	27%	35%
Being where the customer is	20%	32%

Airline ☐   Travel brands ▮

What is the biggest challenge you feel mobile could help your organization address in 2019?

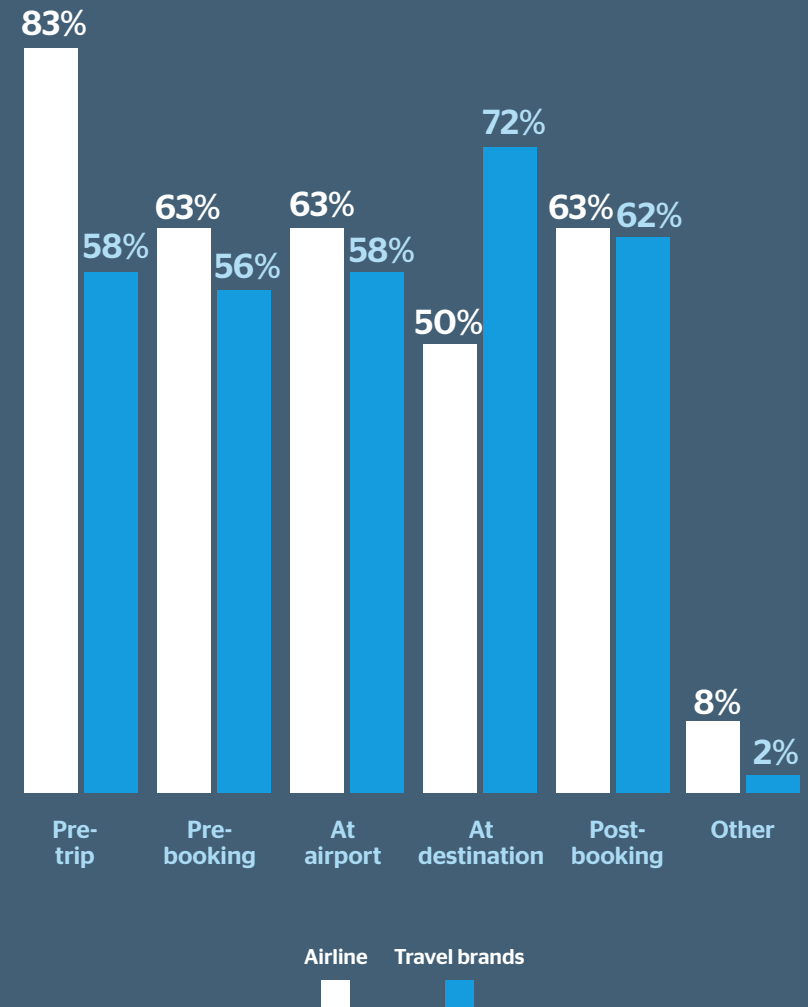| Challenge	Airline	Travel brands
Increased engagement	33%	18%
More direct sales	26%	10%
Improving traveler retention & loyalty	15%	35%
Acquiring new customers	11%	25%
Disruption / IROPs	7%	2%
Customer support	4%	2%
Reducing traveler support costs (operational costs)	4%	6%
Building brand awareness	0%	2%

Airline ☐ **Travel brands** ☐

Travel brands crave more data

The travel industry isn't short on data, but airlines and travel brands are hungry for more insights at every stage of the traveler journey.

While airlines are more interested in pre-trip data, travel brands crave at-destination insights. Both phases of the customer journey offer opportunities for increasing customer engagement and upselling ancillaries, two core mobile goals for all travel brands.

The good news for travel brands is that 65% of travelers are likely to provide their personal details if it resulted in a more personalized travel experience. This, combined with the reported investments in business intelligence (BI) and predictive analytics, could result in airlines and travel brands matching customer expectations by providing more personalized and data-driven products and services in 2019 and beyond.

What areas of the customer journey would you like to have more data on?

Stage	Airline	Travel brands
Pre-trip	83%	58%
Pre-booking	63%	56%
At airport	63%	58%
At destination	50%	72%
Post-booking	63%	62%
Other	8%	2%

Airline ▢   Travel brands ▮

Conclusion

The last decade has seen an explosion in mobile culture, spearheaded by the iOS and Android app stores. In the last few years, we've seen 'mobile first' become 'mobile only' in many regions, and platforms like voice, social, and messaging have created new ways for travelers to engage with brands, on their own terms. And while travel apps are still as popular (if not more popular) than ever, users are also now breaking free from your app icon on their home screen.

It's no longer enough to focus efforts solely on getting users to download an app; travel brands should be thinking about mobile omnipresence, going to where the customer is, engaging with them through the channels they're using.

This makes some of our research findings all the more surprising with only 20% of airlines and 32% of other travel brands seeing 'being where the customer is' as a priority. As customer expectations become more sophisticated and they continue to turn to non-app mobile channels to enhance their experiences, the travel brands who don't prioritize being on those channels will certainly fall behind.

In 2019, travelers will still use your travel app, but they're also likely to want to message you through Facebook Messenger, or search for their flight status through Siri, or ask Amazon's Alexa to check them in. But one platform, one device will continue to run through all those new conversations and that's mobile. Just keep in mind that your mobile strategy shouldn't be your 'app strategy'; it must take a multi-channel approach, or your customers will turn to the brands who offer the best mobile experience, through whatever channel they choose.

About Travelport Digital

At Travelport Digital we deliver innovative digital travel solutions for airlines, TMCs and travel agencies to meet the expectations of today's ultra-connected travelers. We create superior, end-to-end travel experiences across multiple devices and channels with the latest in mobile technology, great UX and design, a travel focused product set and close collaboration with our clients. Our work enables airlines and travel companies to leverage 'every moment in travel' with mobile and digital services that transform how they interact with their customers.

– 50+ million app downloads (as of January 2019)

– 100 number 1 travel apps in App Store / Google Play

– 775 App Store promotions in the last two years

– 4.5 average app star rating

– 330+ mobile experts dedicated to travel

– 34 industry awards for our apps (2014 – Present)

travelportdigital.com