

RESEARCH



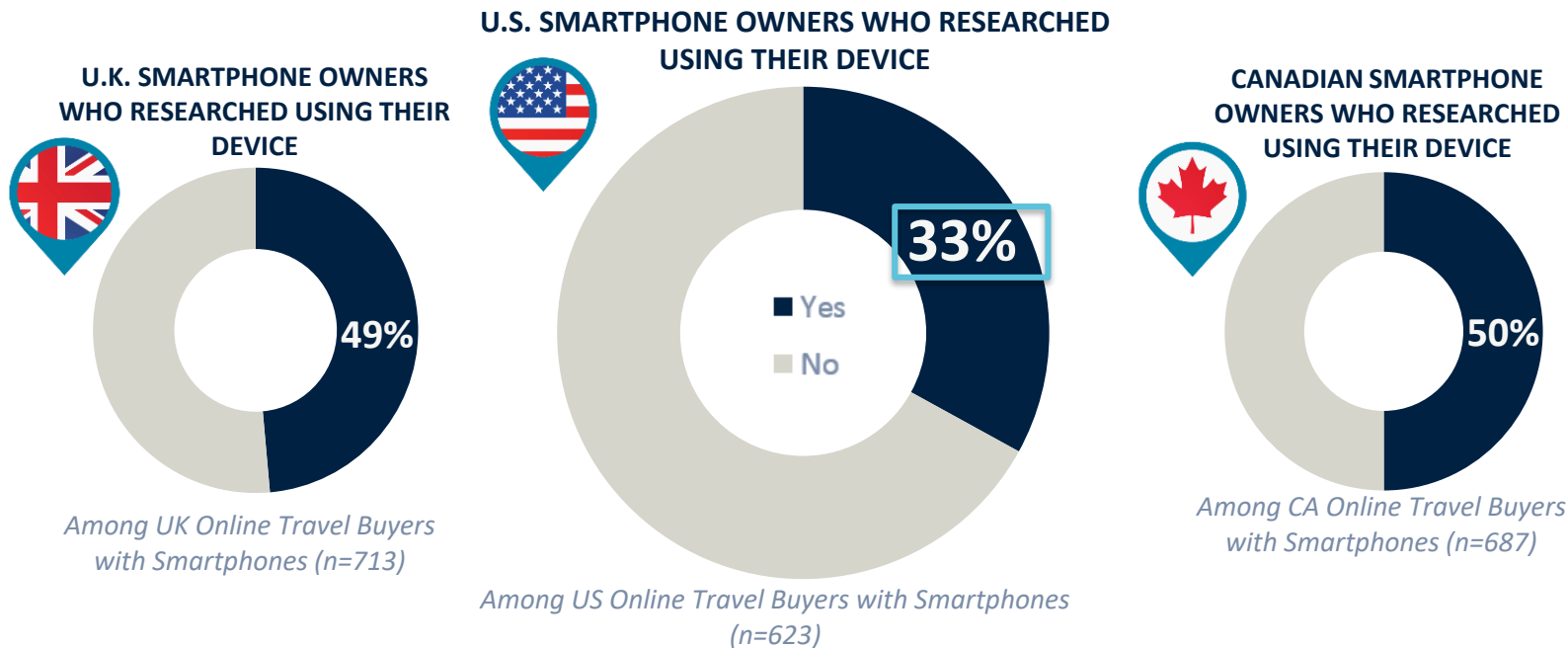
TRAVEL CONSUMER DEVICE USAGE: DATA AND TRENDS

Mobile and multi-device
usage during the traveler's
path to purchase

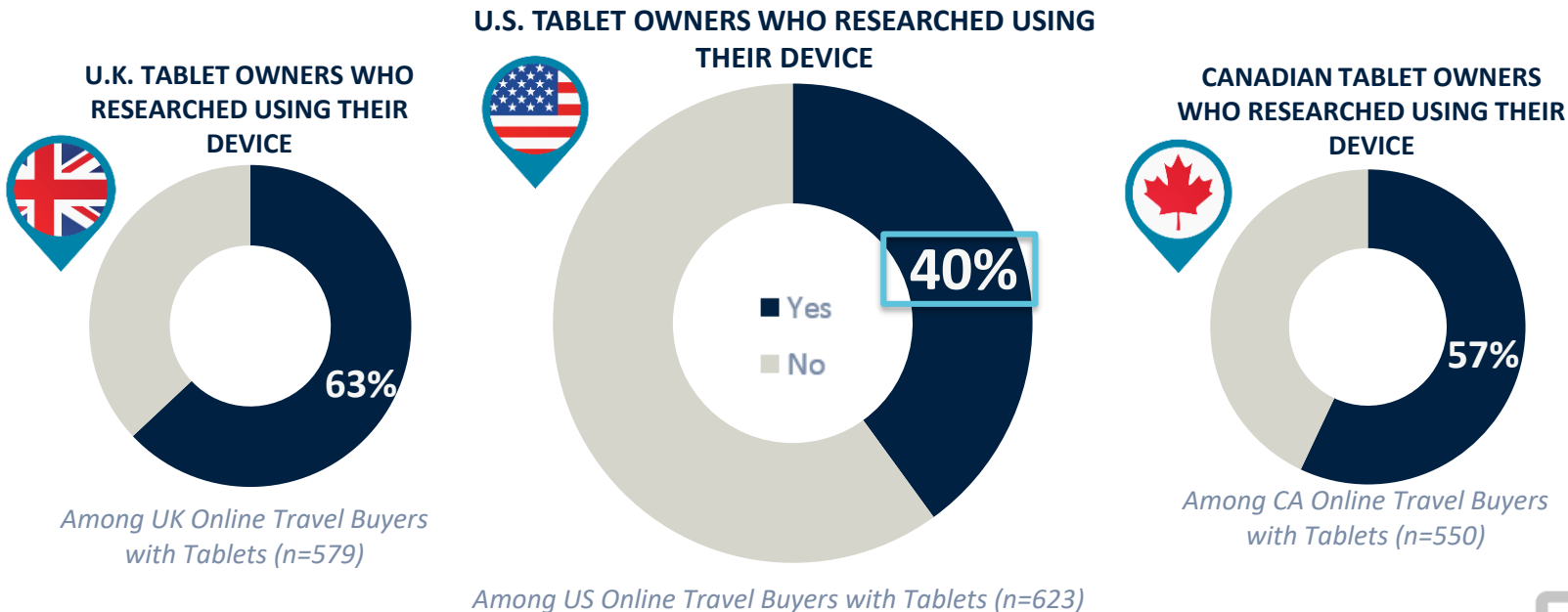


US, UK and CA: Mobile & Multi-Platform

FEWER U.S. TRAVEL BOOKERS USE THEIR SMARTPHONES TO PLAN TRIPS THAN U.K. OR CANADIAN TRAVEL BOOKERS

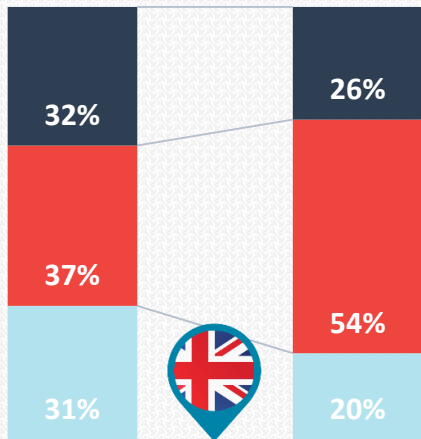


FEWER U.S. TRAVEL BOOKERS USE THEIR TABLET DEVICES TO PLAN TRIPS THAN U.K. OR CANADIAN TRAVEL BOOKERS



WITH MOBILE TRAVEL USAGE ON THE RISE, WE SEE CANADIAN USERS SLOWLY SHIFTING AWAY FROM DESKTOP-ONLY USAGE.

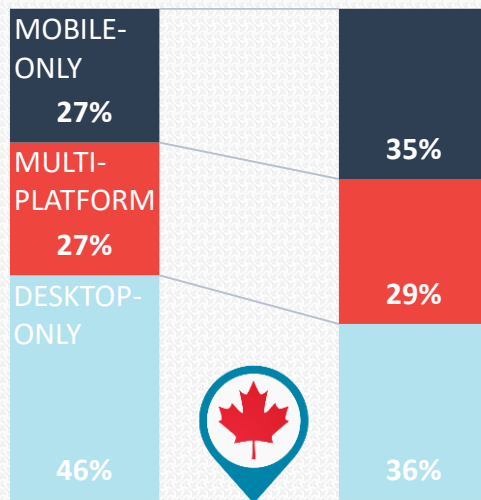
Share of Total Digital Travel Users
April 2015 versus April 2016



Apr-2015

Apr-2016

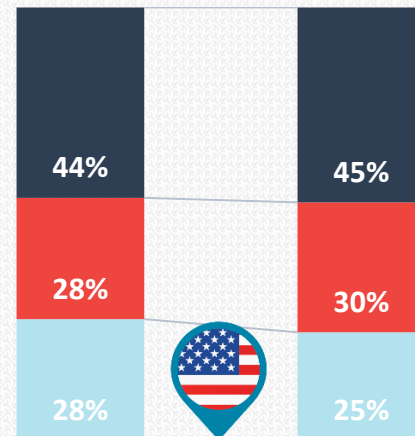
Share of Total Digital Travel Users
April 2015 versus April 2016



Apr-2015

Apr-2016

Share of Total Digital Travel Users
April 2015 versus April 2016



Apr-2015

Apr-2016

UK Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.K., February 2015 - February 2016 data, Unique Visitors.

CA Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.S., April 2015 - April 2016 data, Platform Share of Multi-Platform Total Unique Visitors.

US Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.S., April 2015 - April 2016 data, Platform Share of Multi-Platform Total Unique Visitors.



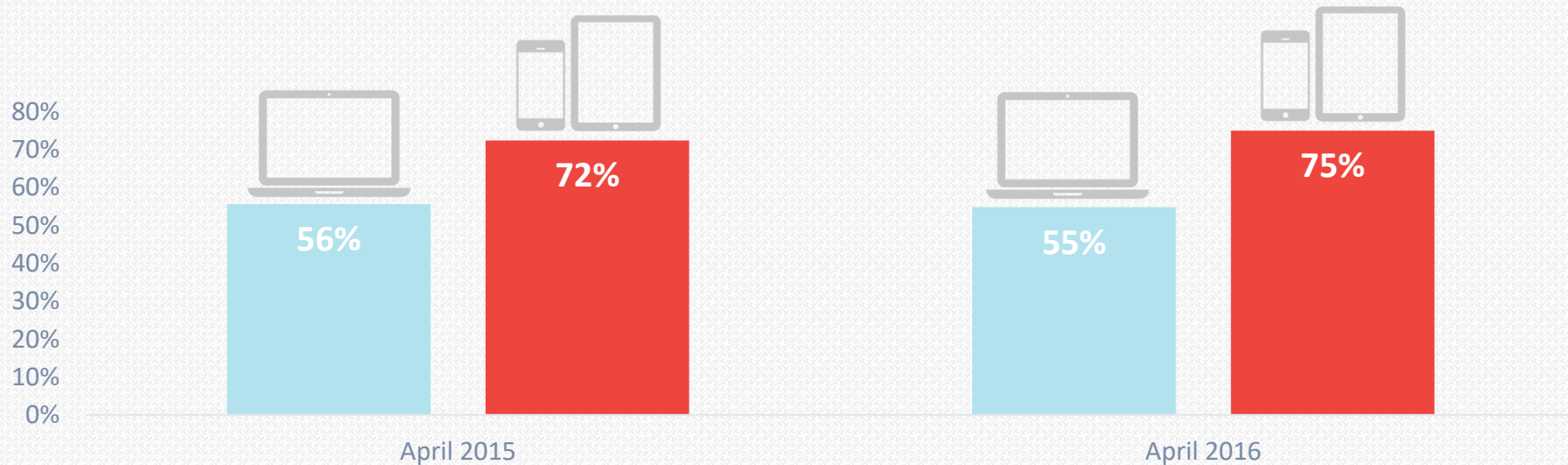


American Traveler: Mobile & Multi-Platform



MOBILE HAS CONSIDERABLY HIGHER REACH THAN DESKTOP WITHIN THE ONLINE TRAVEL INDUSTRY IN THE U.S.

Mobile now reaches 75% of all U.S. online travel users, while desktop reaches only 55%.

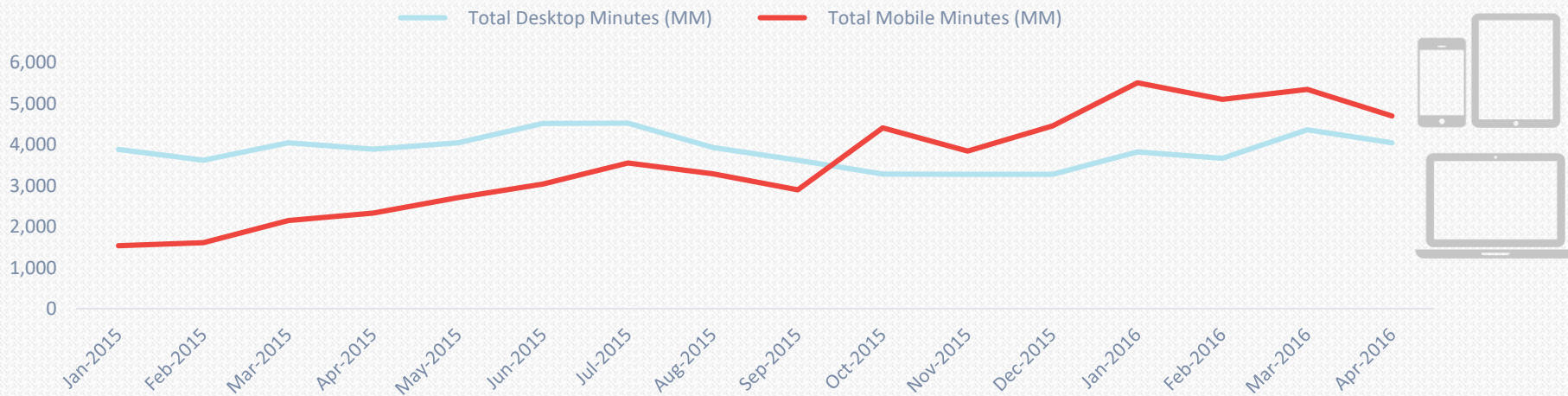


Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.S., January 2015 – April 2016 data, Reach of Total Unique Visitors in Travel.



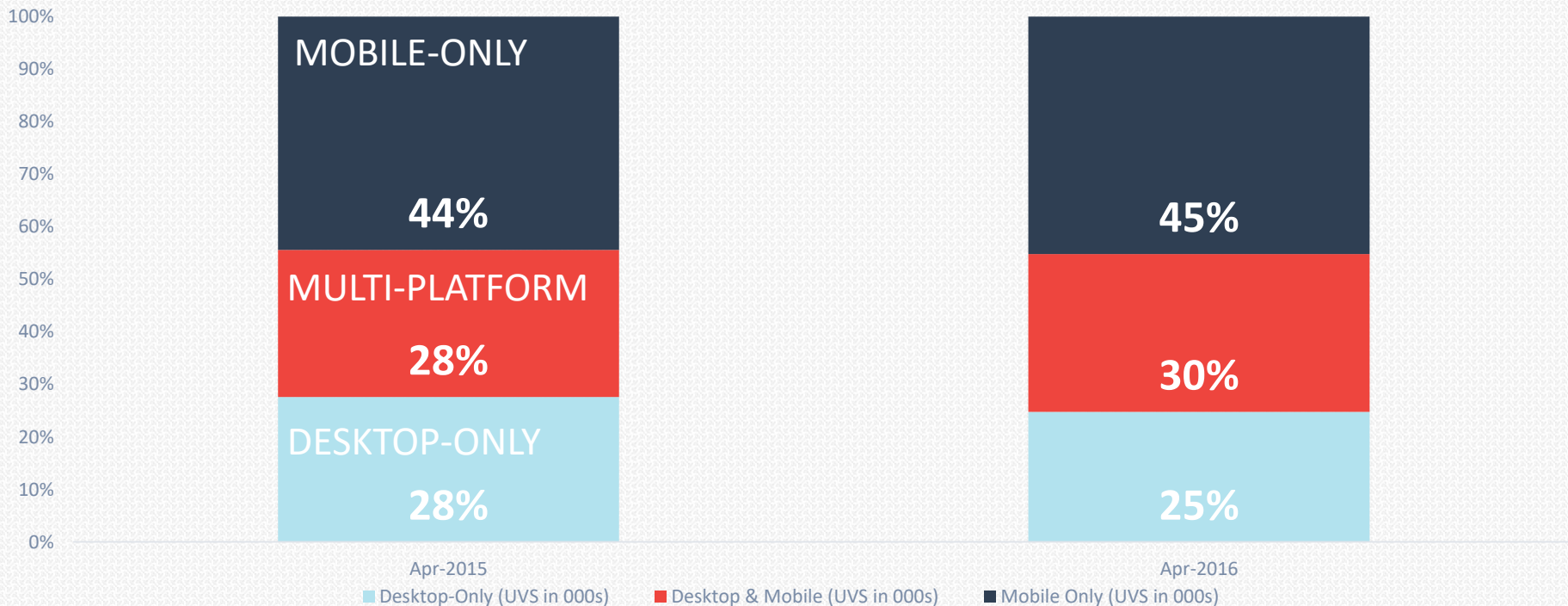
MORE MINUTES ARE SPENT ENGAGING WITH TRAVEL CONTENT ON MOBILE DEVICES THAN ON DESKTOP IN THE U.S..

We now consistently see more minutes spent on mobile devices since October 2015, largely due to annual mobile growth in engagement strongly outpacing that of desktop.





WITH MOBILE TRAVEL USAGE ON THE RISE, WE SEE USERS SLOWLY SHIFTING AWAY FROM DESKTOP-ONLY USAGE.



Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.S., April 2015 – April 2016 data, Platform Share of Multi-Platform Total Unique Visitors.



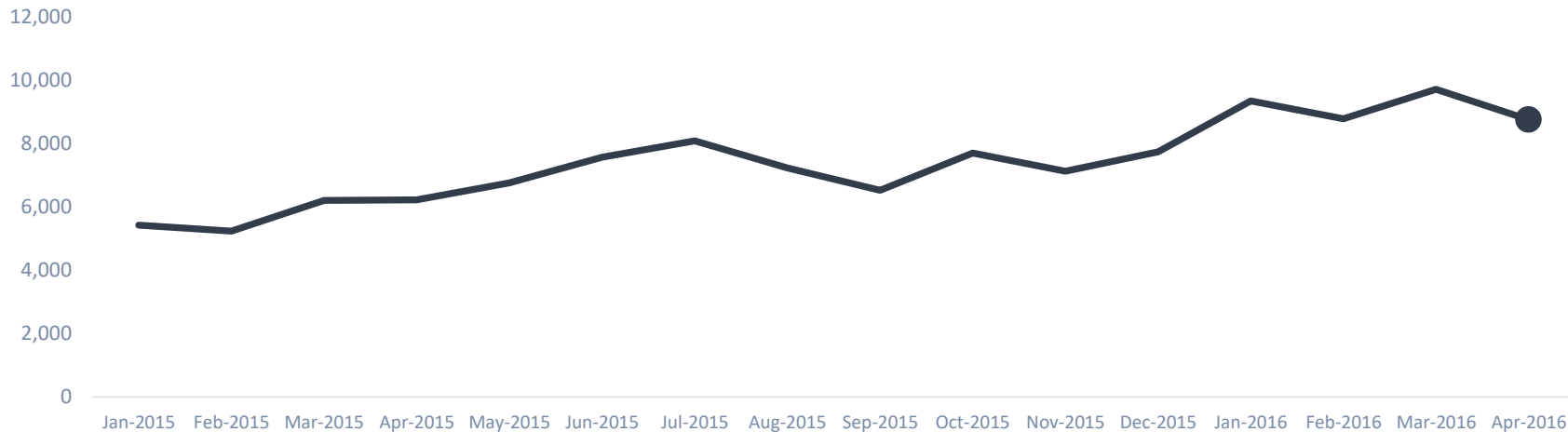


8.7 BILLION MINUTES (+41% Y/Y)

SPENT ON DIGITAL TRAVEL CONTENT IN THE U.S.

TOTAL U.S. INTERNET MINUTES GREW BY 7%.

Total Multi-Platform Travel Minutes (MM)

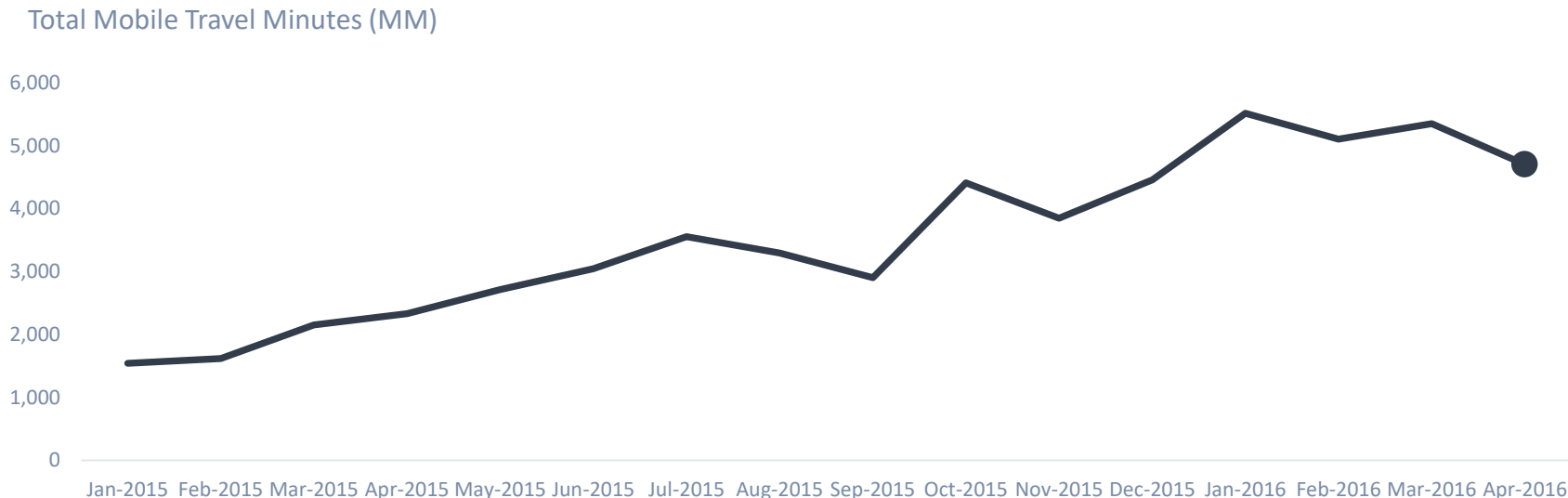




101% Y/Y GROWTH IN MOBILE TRAVEL MINUTES.

ALMOST 5 BILLION MOBILE MINUTES SPENT ON DIGITAL TRAVEL CONTENT IN THE U.S.

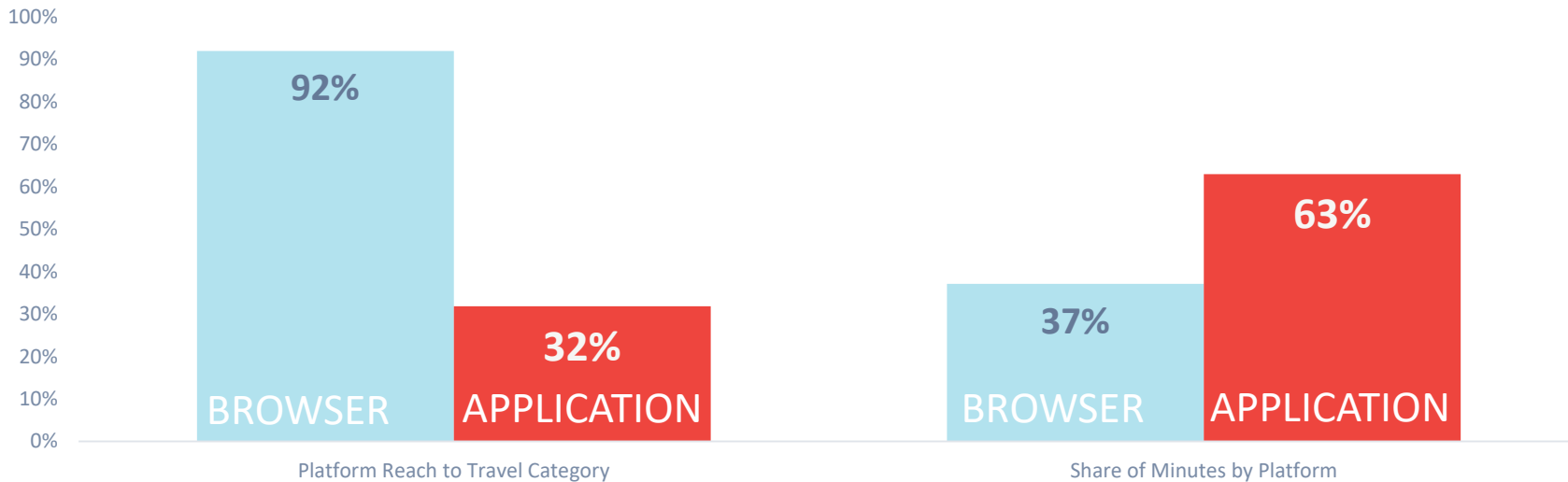
TOTAL U.S. INTERNET MOBILE MINUTES GREW BY 11%.





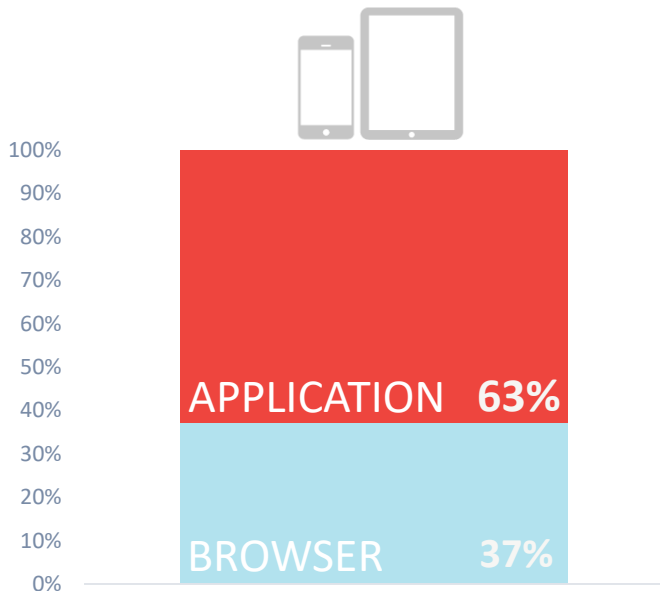
BROWSER REACHES MORE THAN 90% OF THE TRAVEL CATEGORY ON MOBILE, BUT COMPRISES LESS THAN 40% OF THE ENGAGEMENT.

Travel Category Access Method Comparison
April 2016

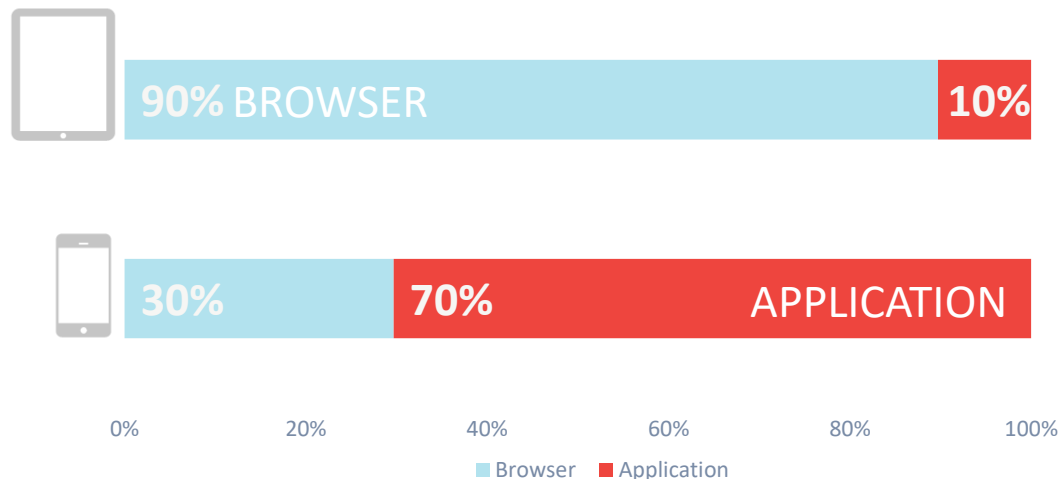




TABLET BROWSER BEHAVIOR SKEWS THE OVERALL MOBILE TRAVEL WORLD TOWARDS BROWSER.



Total Travel Category (All Platforms)
Share of Total Travel Mobile Minutes
Browser vs. Application, April 2016

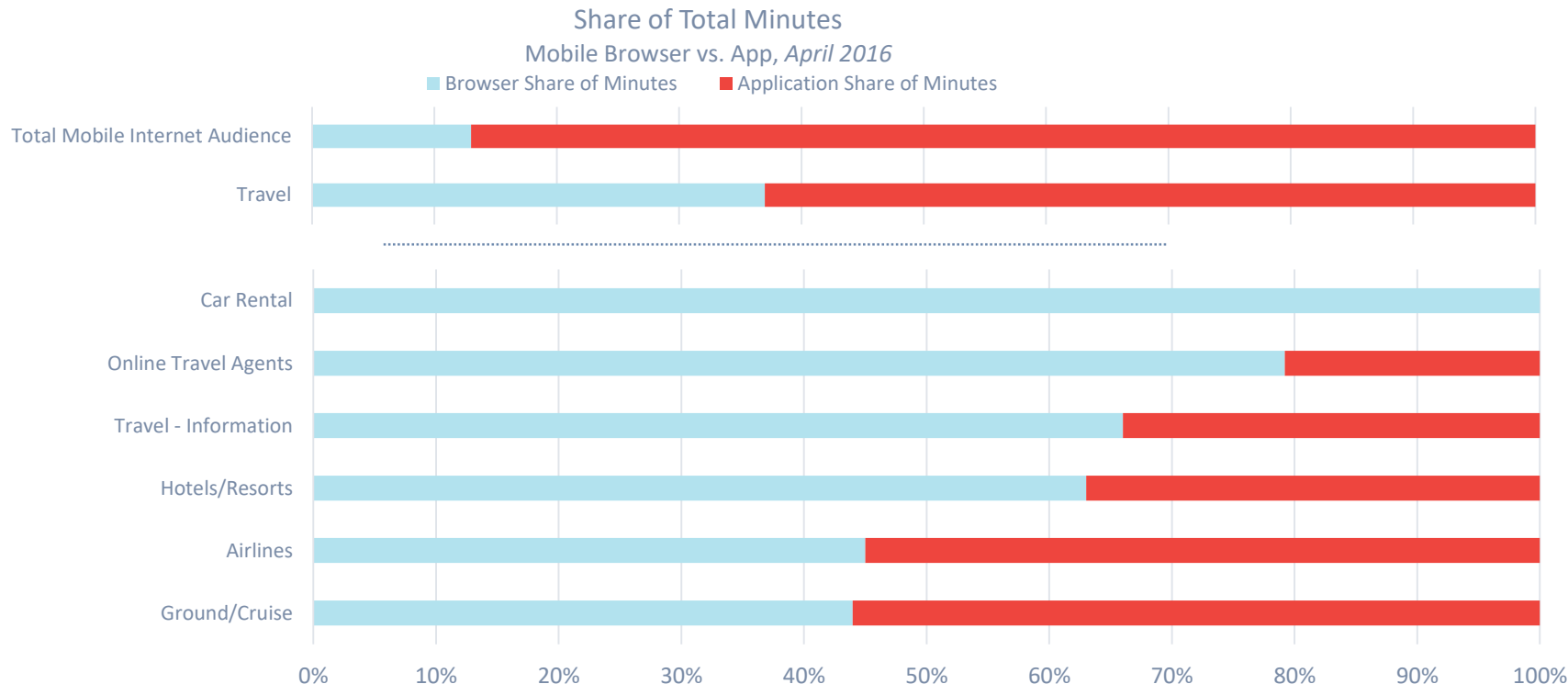


Browser vs. Application Mobile Travel Minutes
April 2016



BROWSER DOMINATES IN MOST TRAVEL CATEGORIES

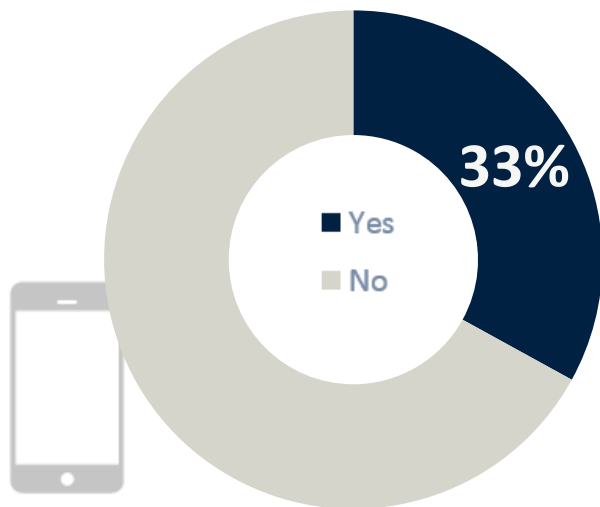
CAR RENTAL AND OTAS HAVE HIGHEST BROWSER SKEW





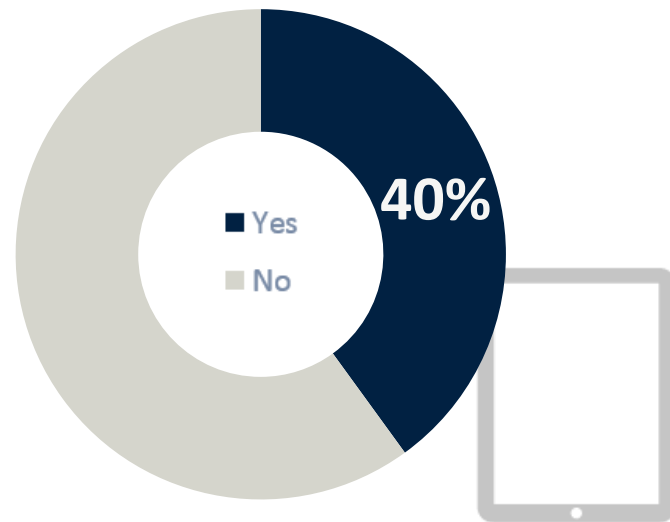
ONE THIRD OF SMARTPHONE OWNERS AND ALMOST HALF OF TABLET OWNERS USED THEIR MOBILE DEVICES TO PLAN TRIPS

U.S. SMARTPHONE OWNERS WHO RESEARCHED USING THEIR DEVICE



Among US Online Travel Buyers with Smartphones (n=623)

U.S. TABLET OWNERS WHO RESEARCHED USING THEIR DEVICE



Among US Online Travel Buyers with Tablets (n=623)



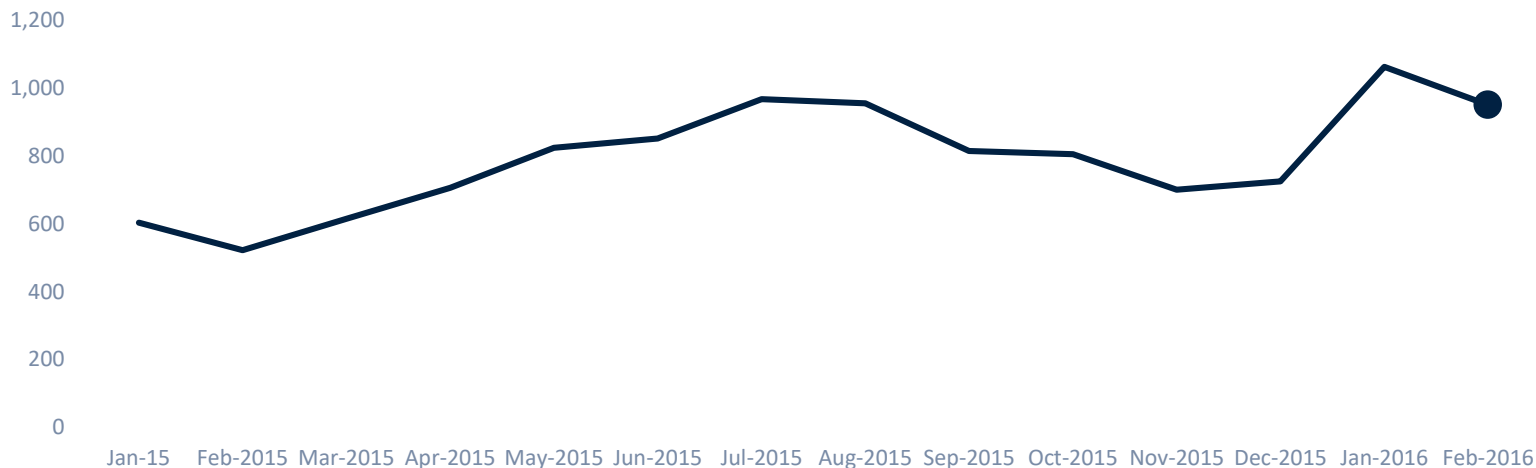
British Traveler: Mobile & Multi-Platform



82% YEAR OVER YEAR GROWTH IN MOBILE TRAVEL MINUTES

ABOUT 1 BILLION MOBILE MINUTES SPENT ON DIGITAL TRAVEL CONTENT IN THE UK

Total Mobile Travel Minutes (MM)



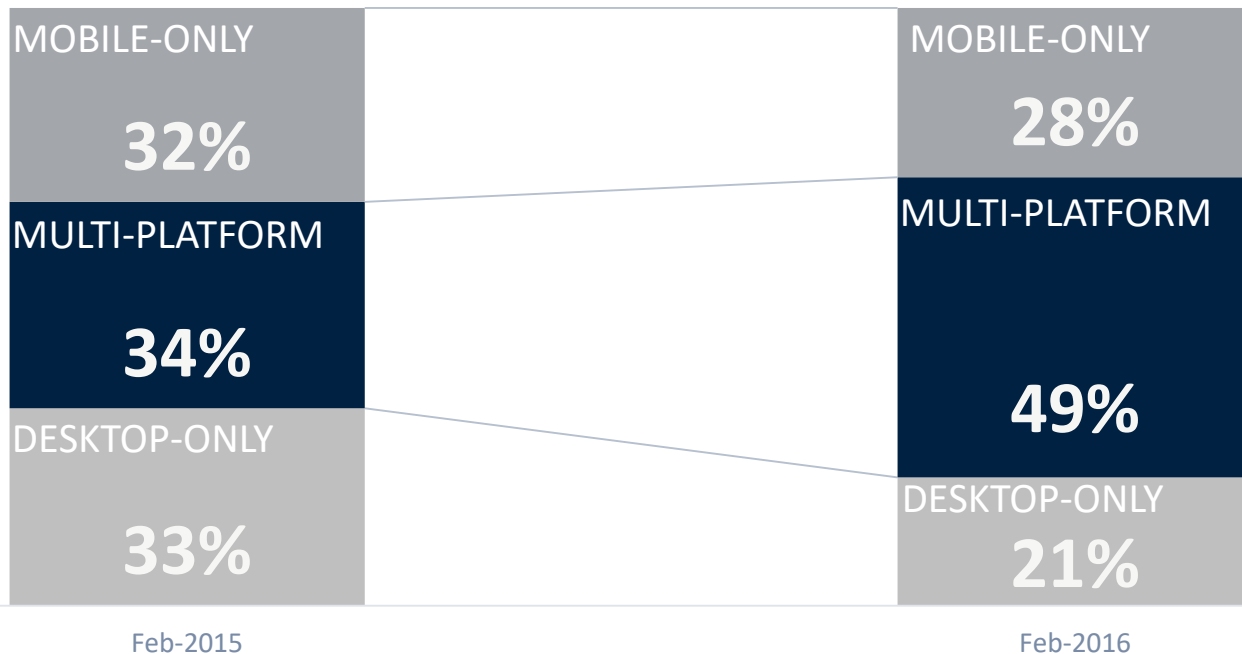


MORE UK USERS NOW ENGAGE WITH TRAVEL CONTENT ON MOBILE THAN DESKTOP DEVICES





UK TRAVEL MOBILE USAGE IS ON THE RISE, AND USERS ARE BECOMING MORE AND MORE DEVICE AGNOSTIC



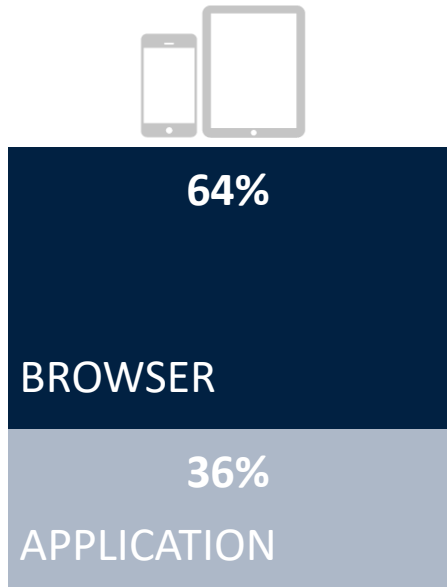
■ Desktop-only Users ■ Desktop AND Mobile Users ■ Mobile-only Users





BROWSERS ARE STILL THE PRIMARY WAY

MOBILE TRAVEL INFORMATION IS ACCESSED ACROSS DEVICES – ESPECIALLY TABLETS



Total Travel Category



Total Mobile Travel Minutes by Access Method
Feb 2016

Application versus Browser Travel Minutes
Feb 2016

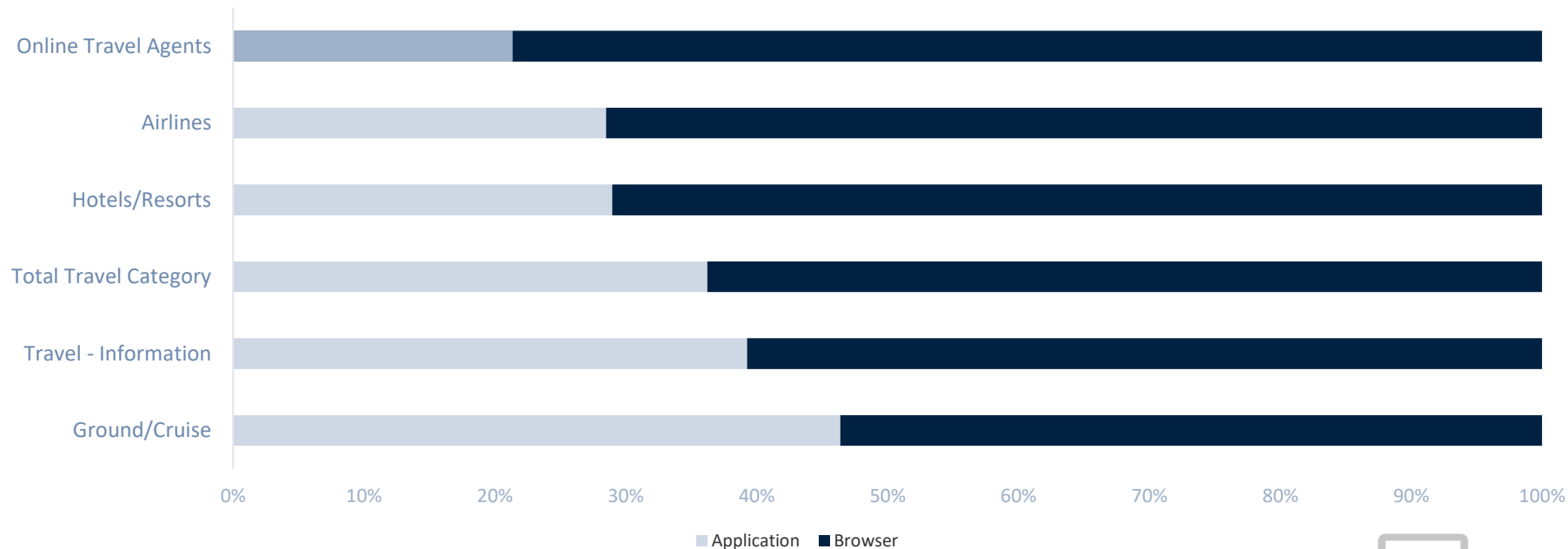


BROWSERS ARE STILL THE PRIMARY WAY

MOBILE TRAVEL INFORMATION IS ACCESSED ACROSS CATEGORIES

Total Share of Minutes

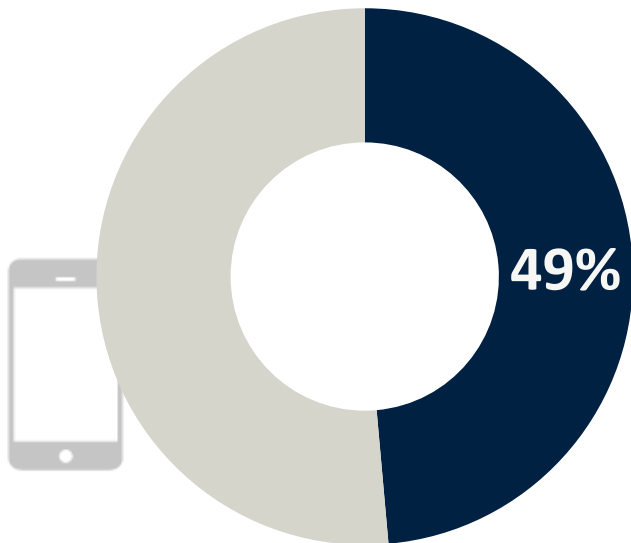
Mobile App vs. Browser, Feb 2016





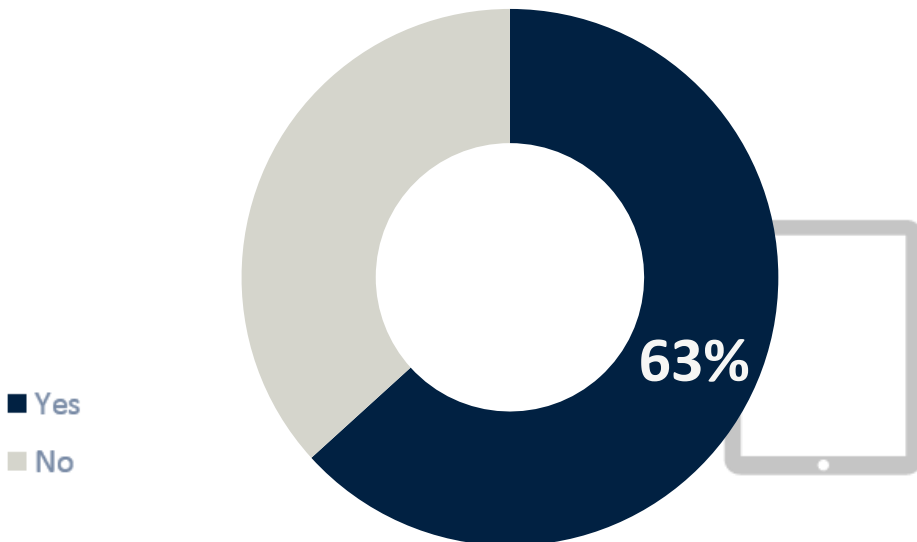
HALF OF SMARTPHONE OWNERS AND OVER THREE IN FIVE TABLET OWNERS USED THEIR MOBILE DEVICES TO PLAN TRIPS

SMARTPHONE OWNERS WHO RESEARCHED USING
THEIR DEVICE



Among UK Online Travel Buyers with Smartphones (n=713)

TABLET OWNERS WHO RESEARCHED USING THEIR
DEVICE



Among UK Online Travel Buyers with Tablets (n=579)

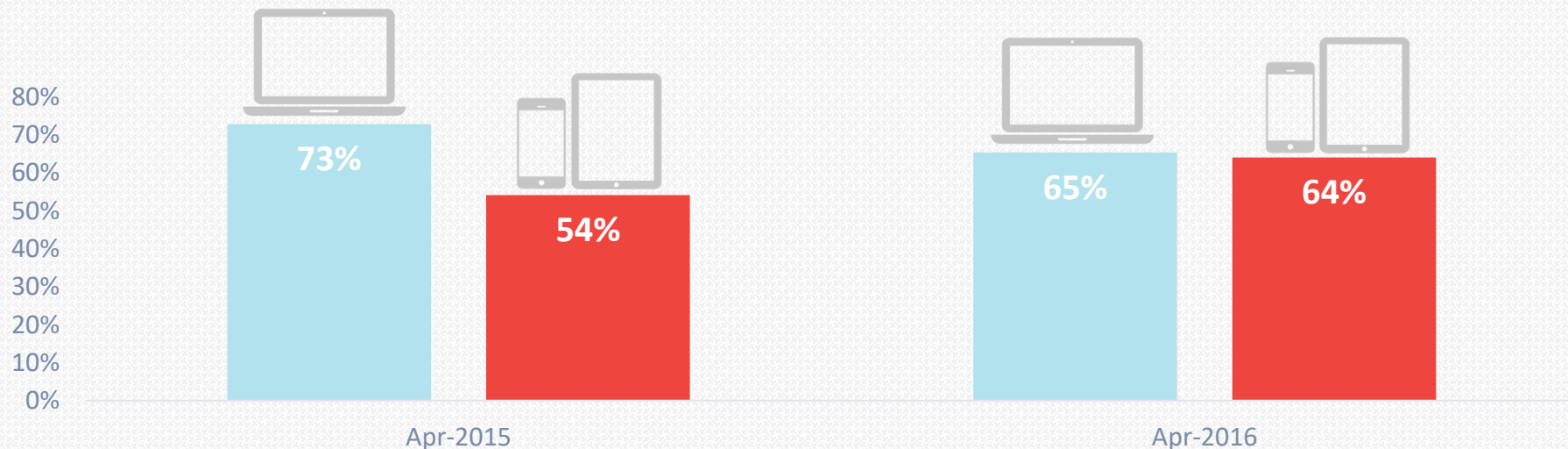


Canadian Traveler: Mobile & Multi-Platform



MOBILE NOW TIES DESKTOP FOR REACH WITHIN THE ONLINE TRAVEL INDUSTRY IN CANADA.

Mobile reaches 64% of all Canadian online travel users, while desktop has declined to 65% reach.

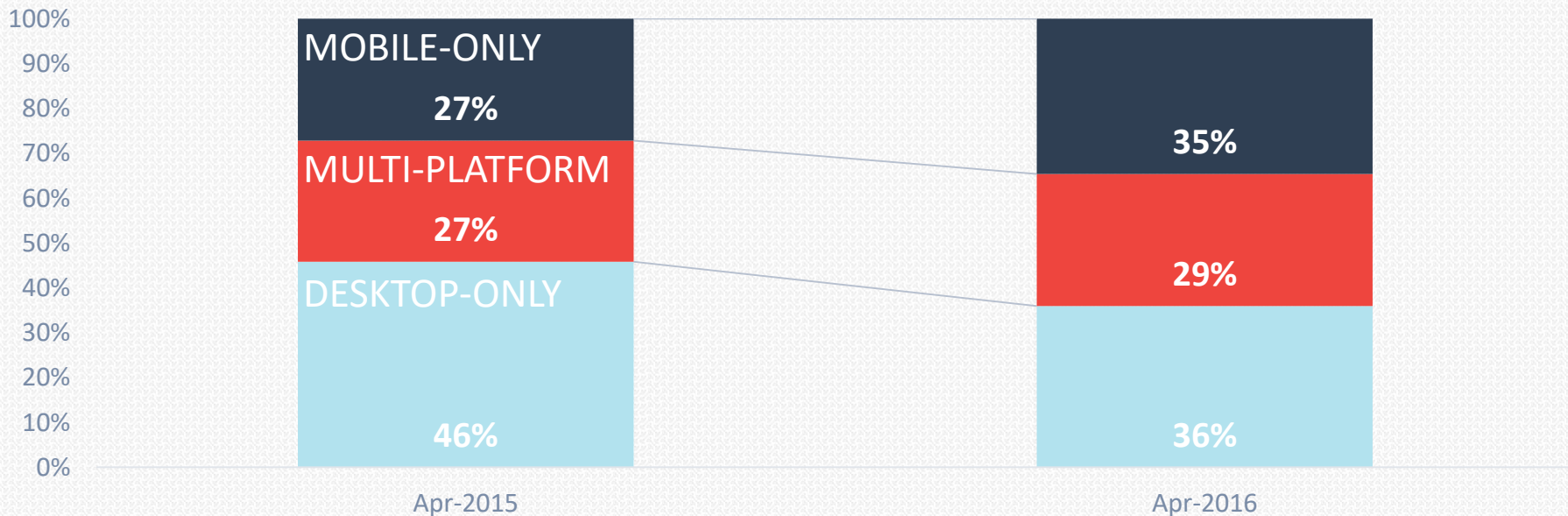


Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, Canada, April 2015 & April 2016 data, Reach of Travel from each Platform to Total Digital Unique Visitors.



WITH MOBILE TRAVEL USAGE ON THE RISE, WE SEE CANADIAN USERS SLOWLY SHIFTING AWAY FROM DESKTOP-ONLY USAGE.

Share of Total Digital Travel Users
April 2015 versus April 2016

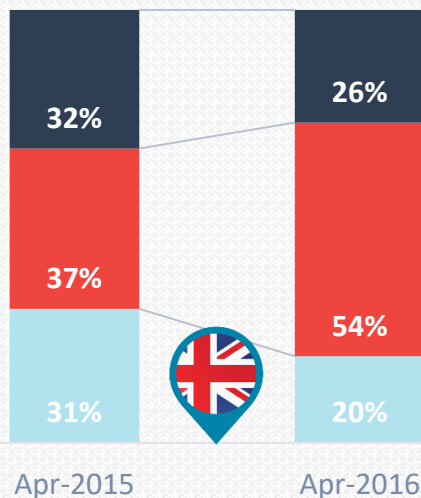


Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.S.,
April 2015 – April 2016 data, Platform Share of Multi-Platform Total Unique Visitors.

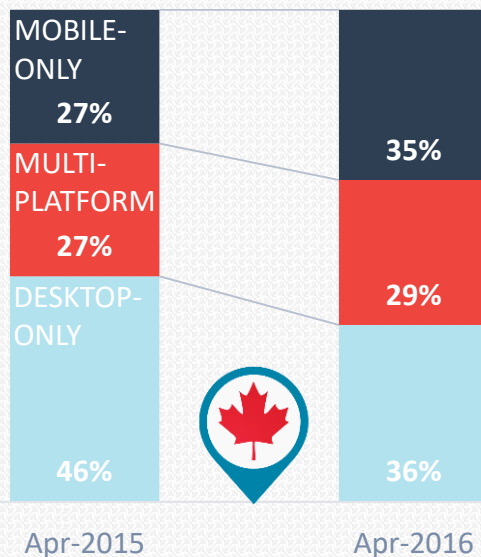


WITH MOBILE TRAVEL USAGE ON THE RISE, WE SEE CANADIAN USERS SLOWLY SHIFTING AWAY FROM DESKTOP-ONLY USAGE.

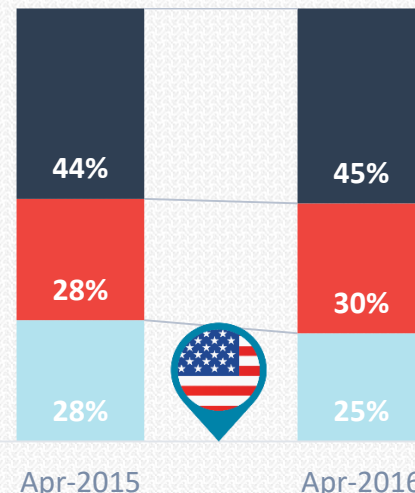
Share of Total Digital Travel Users
April 2015 versus April 2016



Share of Total Digital Travel Users
April 2015 versus April 2016



Share of Total Digital Travel Users
April 2015 versus April 2016



UK Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.K., February 2015 - February 2016 data, Unique Visitors.

CA Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.S., April 2015 - April 2016 data, Platform Share of Multi-Platform Total Unique Visitors.

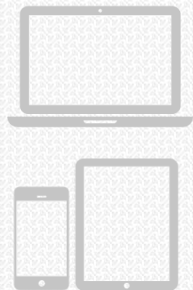
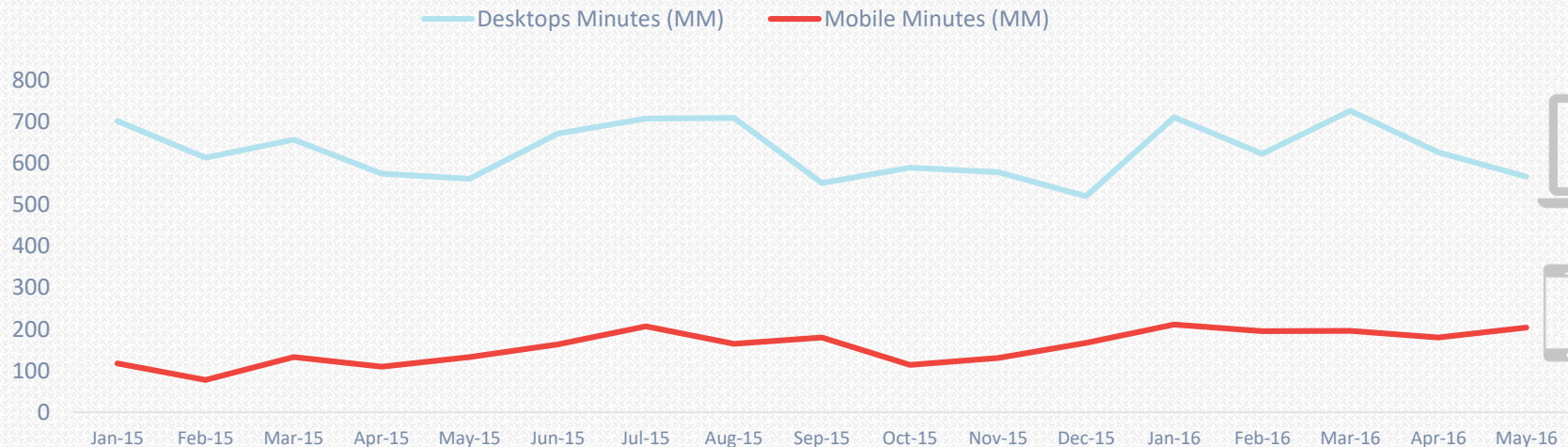
US Data Source: comScore Media Metrix Multi-Platform Media Trend Reporting, U.S., April 2015 - April 2016 data, Platform Share of Multi-Platform Total Unique Visitors.





MORE MINUTES ARE STILL SPENT ENGAGING WITH TRAVEL CONTENT ON DESKTOP DEVICES THAN MOBILE IN CANADA.

BUT MOBILE ENGAGEMENT IS GROWING.



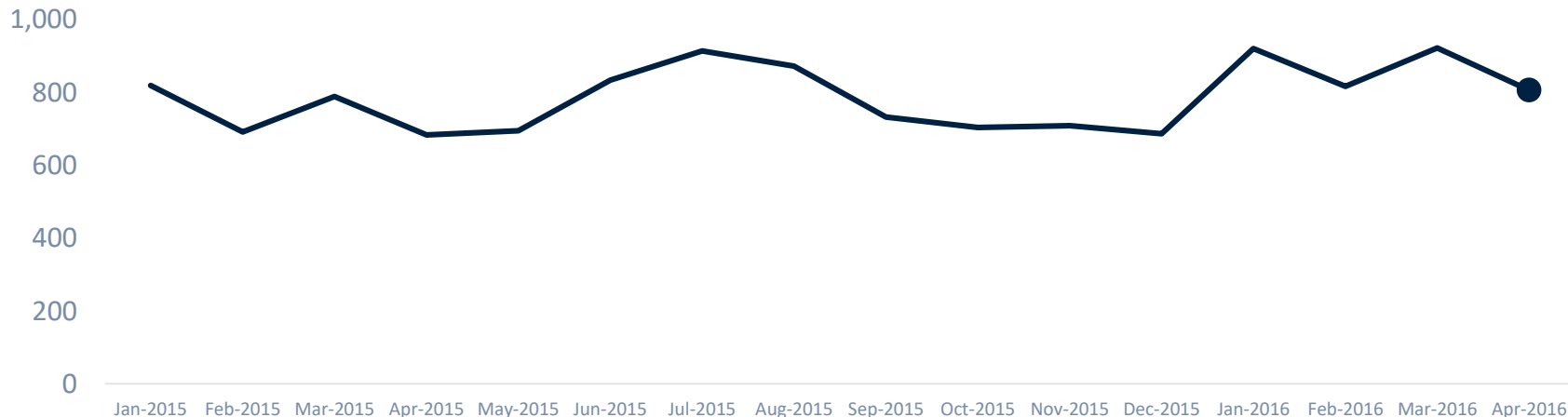


806 MILLION MINUTES (+18% Y/Y)

SPENT ON DIGITAL TRAVEL CONTENT IN CANADA.

IN COMPARISON, TOTAL INTERNET MINUTES DROPPED BY -1% IN CANADA.

Total Multi-Platform Travel Minutes (MM)



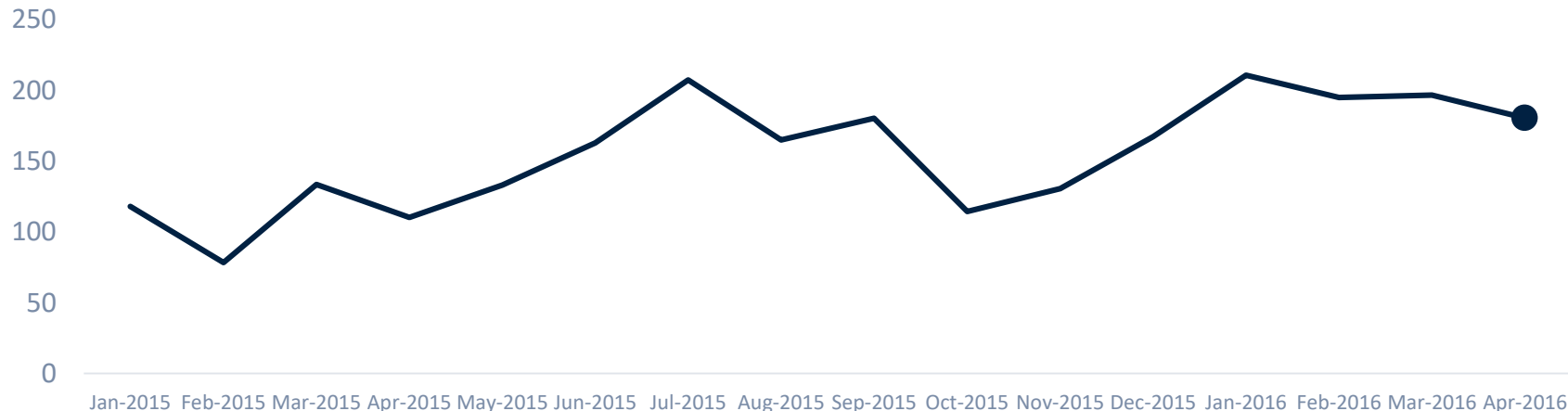


64% Y/Y GROWTH IN MOBILE TRAVEL MINUTES.

NEARLY 200 MILLION MOBILE MINUTES SPENT ON DIGITAL TRAVEL CONTENT IN CANADA.

IN COMPARISON, TOTAL INTERNET MOBILE MINUTES GREW BY 5% IN CANADA.

Total Mobile Travel Minutes (MM)

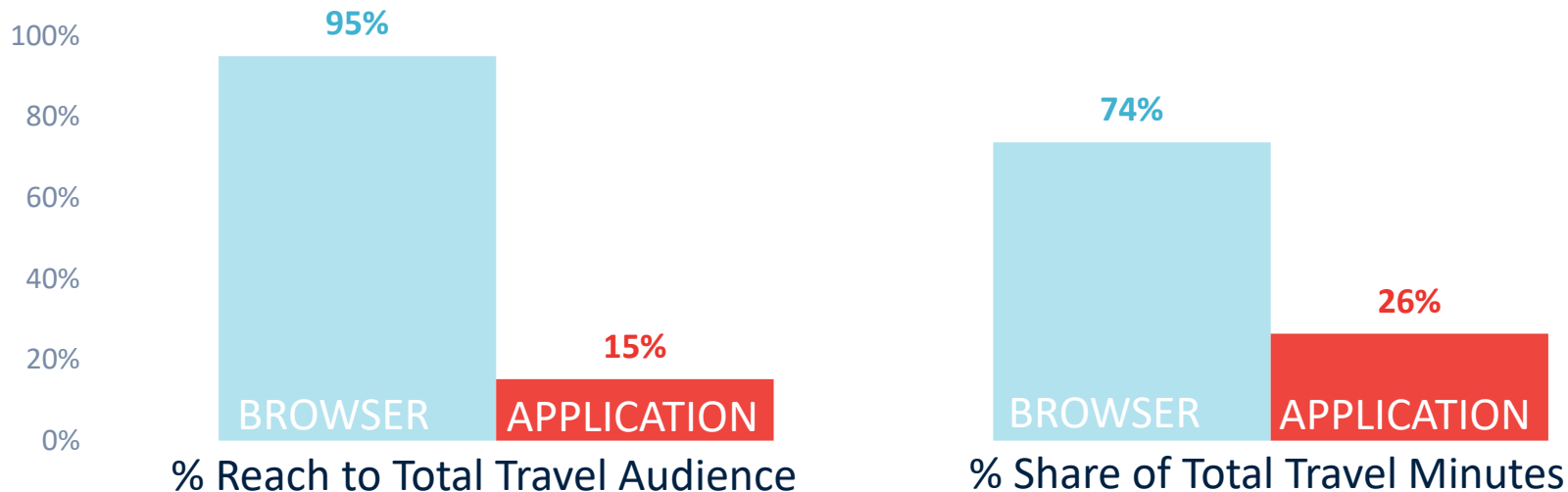




BROWSER REACHES 95% OF THE TRAVEL CATEGORY AUDIENCE AND COMPRISES NEARLY 3 OF 4 MINUTES SPENT ON MOBILE.

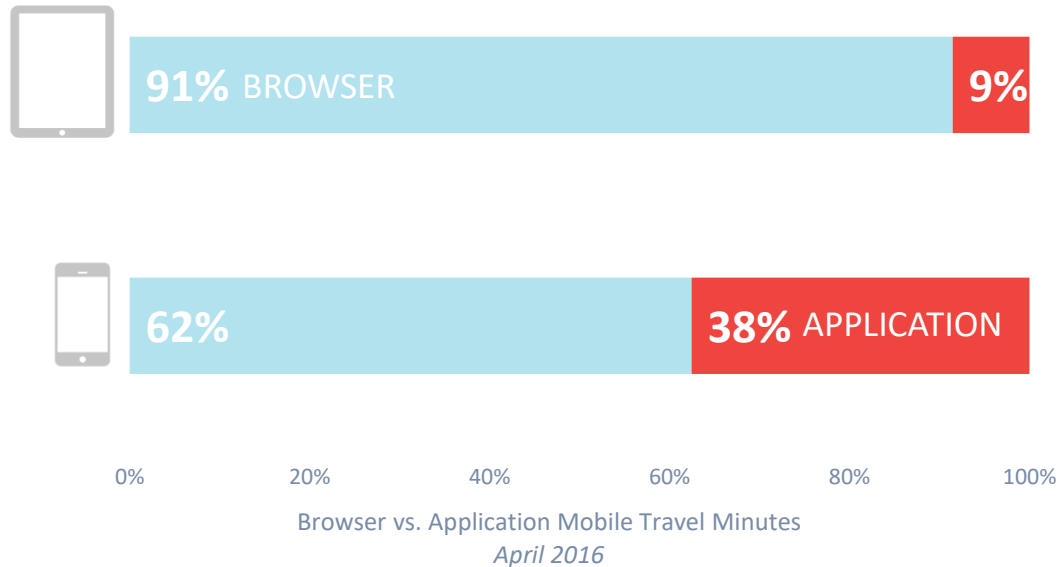
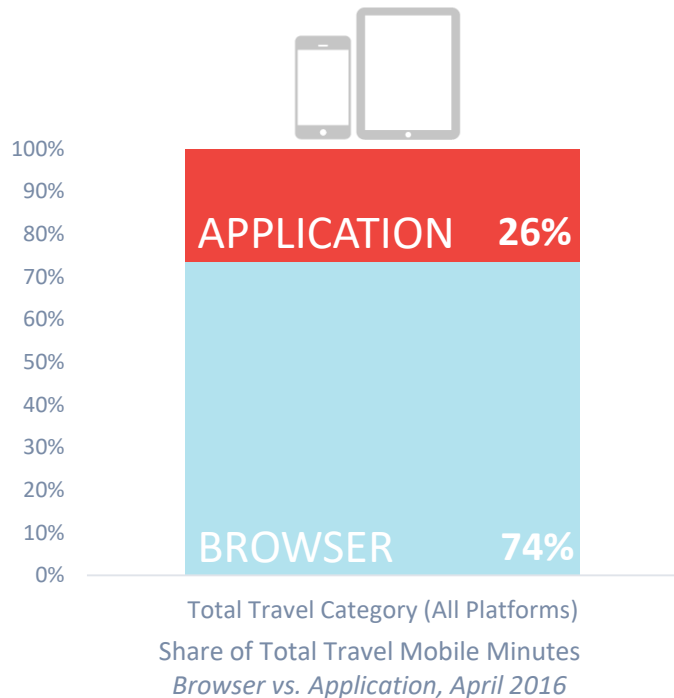
MOBILE APPS SHOW HIGHER MINUTES PER USER ENGAGEMENT THAN MOBILE BROWSE.

Travel Category Access Method Comparison
April 2016





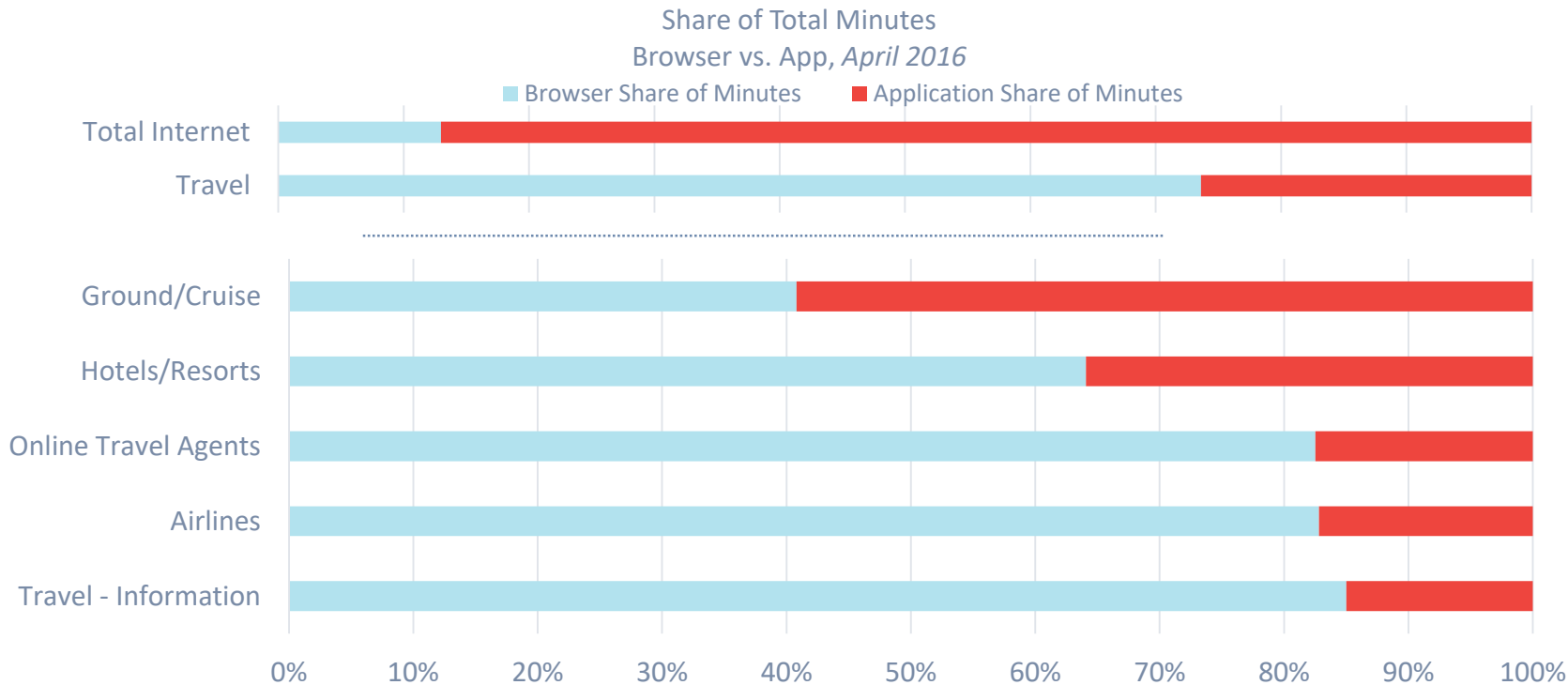
TABLET BROWSER BEHAVIOR SKEWS THE OVERALL MOBILE TRAVEL WORLD TOWARDS BROWSER.





BROWSER DOMINATES IN MOST TRAVEL CATEGORIES.

TRAVEL INFORMATION SITES HAVE HIGHEST BROWSER SKEW.



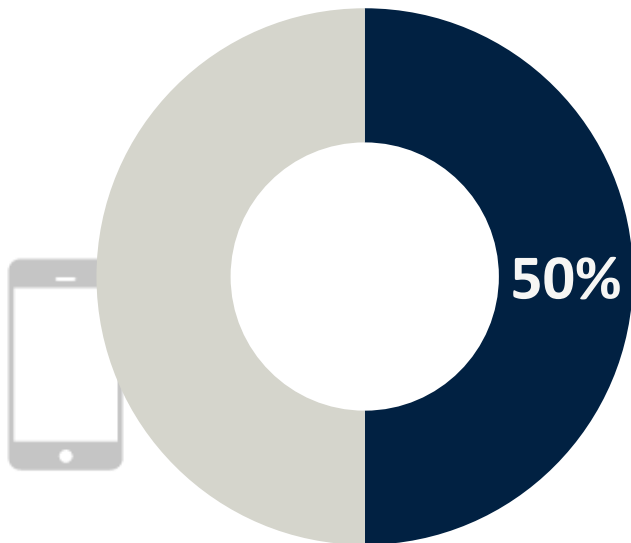


HALF OF SMARTPHONE OWNERS AND CLOSE TO THREE IN FIVE TABLET OWNERS ENGAGE

WITH THEIR DEVICES WHEN PLANNING TRIPS.

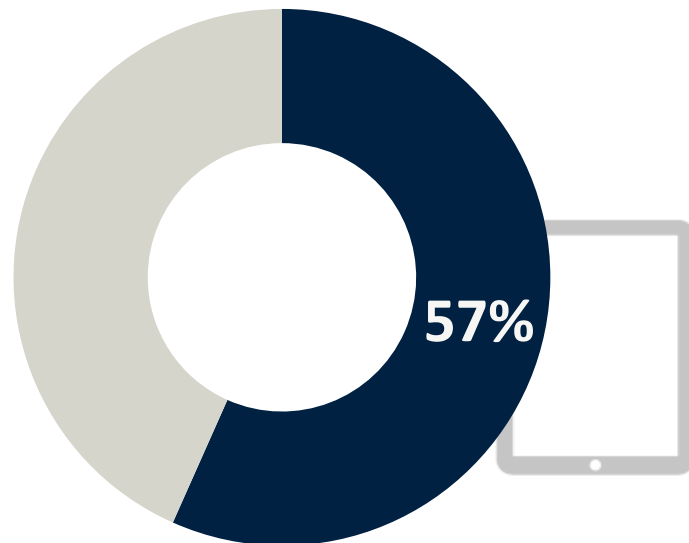
Researched Using a Smartphone

(Base: Smartphone Owners)



Researched Using a Tablet

(Base: Tablet Owners)



■ Yes

■ No

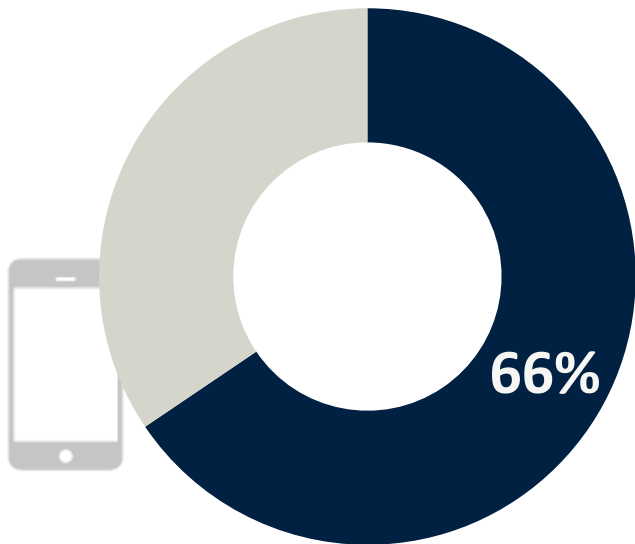


OVER SIX IN TEN MILLENNIAL SMARTPHONE OWNERS AND TABLET OWNERS ENGAGE

WITH THEIR DEVICES FOR TRAVEL PLANNING.

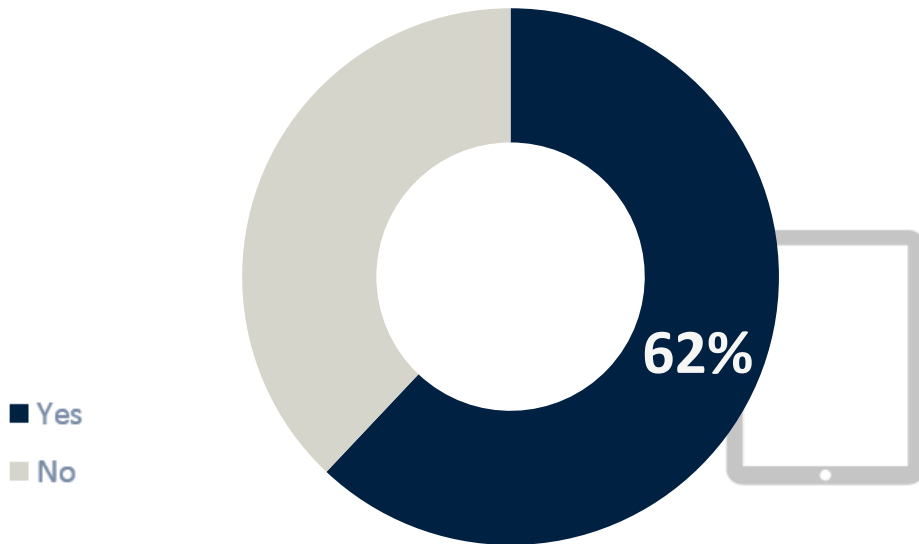
Millennials Who Researched Using a Smartphone

(Base: Millennial Smartphone Owners)



Millennials Who Researched Using a Tablet

(Base: Millennial Tablet Owners)



THANK YOU

DOWNLOAD THE STUDY

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