

KAYAK

MOBILE TRAVEL REPORT

— 2016 —

GUIDE
BOOK



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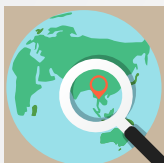


The birth of the Internet has had an enormous impact on the travel industry, with consumers adopting online travel tools to plan and manage their trips. Today, mobile technologies act as a catalyst to influence the consumer travel journey, particularly as travel and mobile devices go hand in hand. Mobile allows travellers to be constantly connected, up-to-date and one step ahead in the planning and managing of trips while on-the-go.

Travel search engine KAYAK.sg discovered that while digital is on the rise, offline is definitely not dead. The travel search engine asked Singaporeans to compare how the rising usage of mobile devices has impacted the way they plan and manage their travel now, versus 10 years ago. KAYAK's travel experts have crunched the data to observe how Singaporean travellers look for their next holidays when using KAYAK's apps on mobile devices and the KAYAK.sg website, revealing the latest trends for the mobile Singapore traveller.



Table of contents



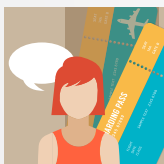
Inspiration and travel planning:

Millennials and Generation Z use mobile for inspiration and holiday planning



Travel booking habits:

Mobile is on the rise but 74% of Singaporeans still use the computer to purchase their holidays



On-the-go:

Singaporeans still prefer printing their travel documents but share experiences via the digital world



Singapore Traveller Profiles:

The iOS Traveller

The Android Traveller

The Computer Traveller

Inspiration and travel planning:

Millennials and Generation Z use mobile for inspiration and holiday planning

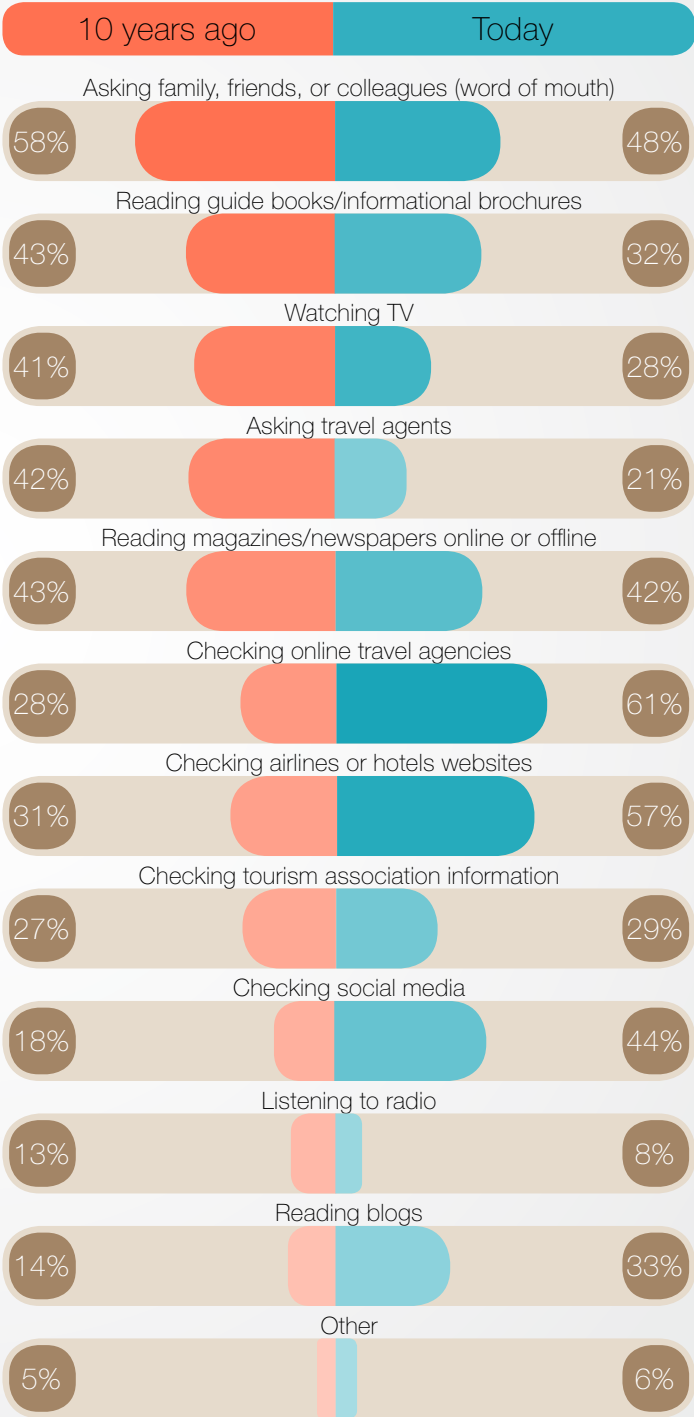


Inspiration sources: Seeking friends' advice is becoming less of a habit

Singaporeans seek out travel inspiration in a very different form today compared to 10 years ago. Back in the day 58% of Singaporeans asked family, friends and colleagues, followed by reading magazines and newspapers (43%), reading printed guide books (43%), or consulting a local travel agent (42%). Online sources were gaining popularity, with nearly one third (31%) of Singaporeans checking airline and hotel websites and 28% using OTAs (online travel agents). Social media was less popular for travel inspiration, with 18% using it at the time.

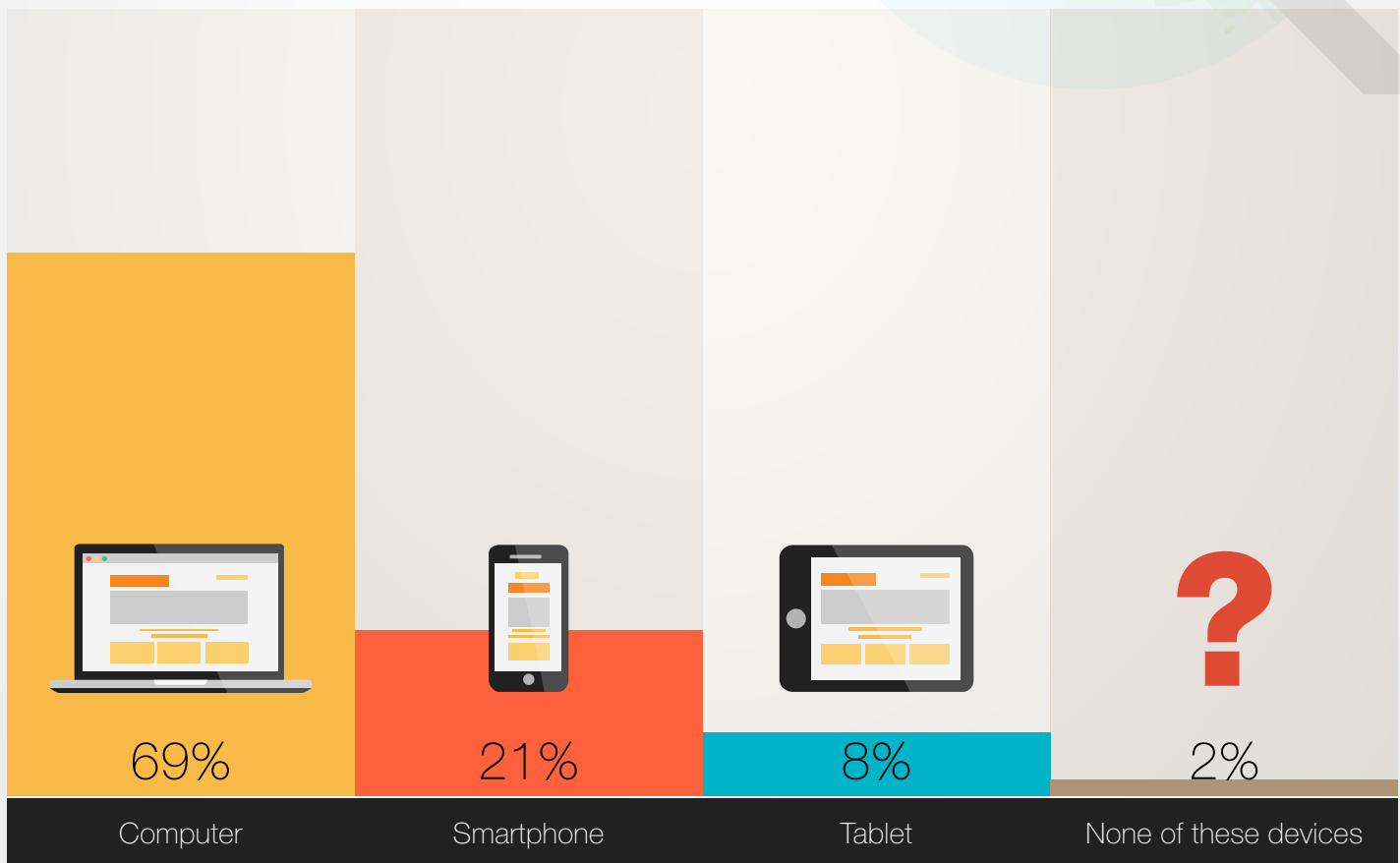
The way Singapore travellers gain travel inspiration today has changed completely, particularly when looking at online versus offline platforms. Almost two thirds (61%) of Singaporeans now consult OTAs, and the number referring to social media (44%) and blogs (33%) has more than doubled compared to 10 years ago. Offline inspiration isn't dead yet, with family, friends and colleagues, and magazines or newspapers remaining popular (43% and 42% respectively). This move to online is highlighted further when looking at the age split, with 66% of the younger generation (18-24 years) now turning to social media or blogs (53%) for inspiration.

Compared to the rest of the Asia Pacific, Hong Kongers are more likely than the average APAC traveller to use a local travel agent for inspiration (33% versus 26%). When it comes to social media, however, Singaporean travellers top the scale, with 44% fuelling their travel dreams via social channels, possibly due to the fact that social media is the easiest way to get free and valuable information.



The computer is still the main tool for Singaporeans to search for their next holidays

The research showed that 69% of Singaporeans use their computer to search for inspiration for their next trip, whereas 29% turn to either a tablet or smartphone. Looking at the age split, it is clear the 18-24 year old segment is the most likely to use a smartphone for this purpose, with 31% already doing so.



The Internet and new technologies have not helped Singaporeans save time on travel planning

More than one third (40%) of Singapore travellers feel they are spending more time to plan their travel these days than they did a decade ago. In fact, a closer look reveals that 50% of the 18-24 age segment feel they spend more time planning travel now, than 10 years ago. This indicates that while Singaporeans these days may perceive this method as faster and more transparent, with more avenues and infinite options for individual travel research, the time spent researching is actually increasing.

Across APAC, travellers indicated mixed feelings regarding time spent on travel planning nowadays versus 10 years ago, with 39% indicating that they spend more time, 30% spending less time and 26% spending the same amount of time.

4%

You are not concerned, you didn't and still don't book your trips

24%

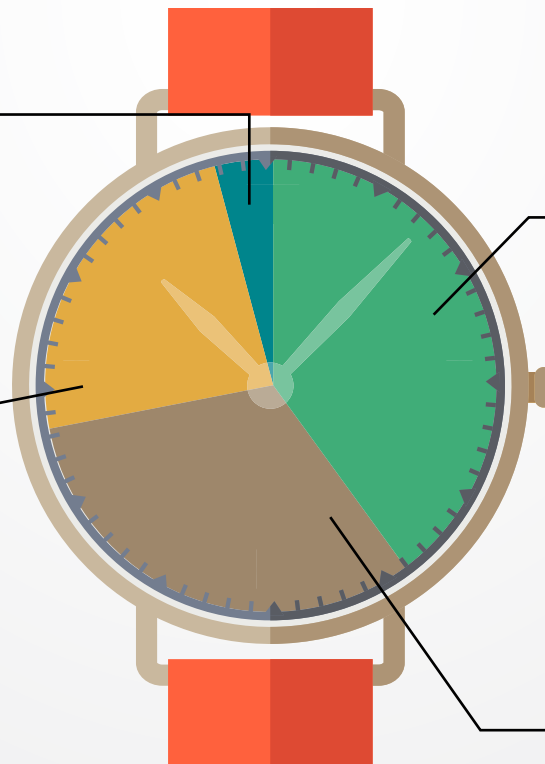
Same amount of time

40%

More time

32%

Less time



Travel booking habits:

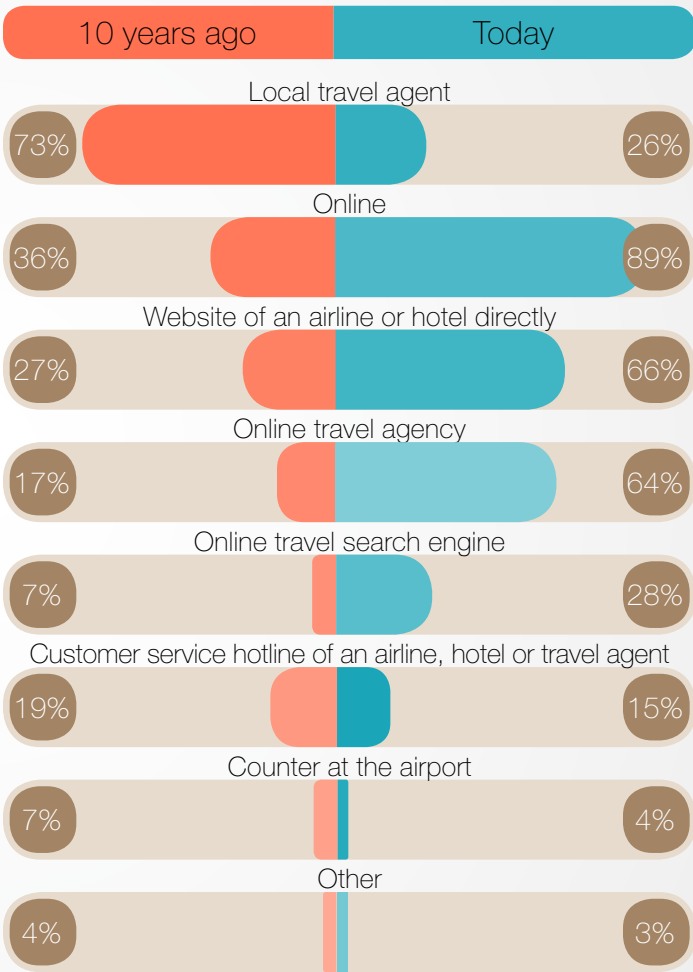
Mobile is on the rise but 74% of Singaporeans still use the computer to purchase their holidays



Services and platforms used: Websites are the major booking method today but local travel agencies still play a role

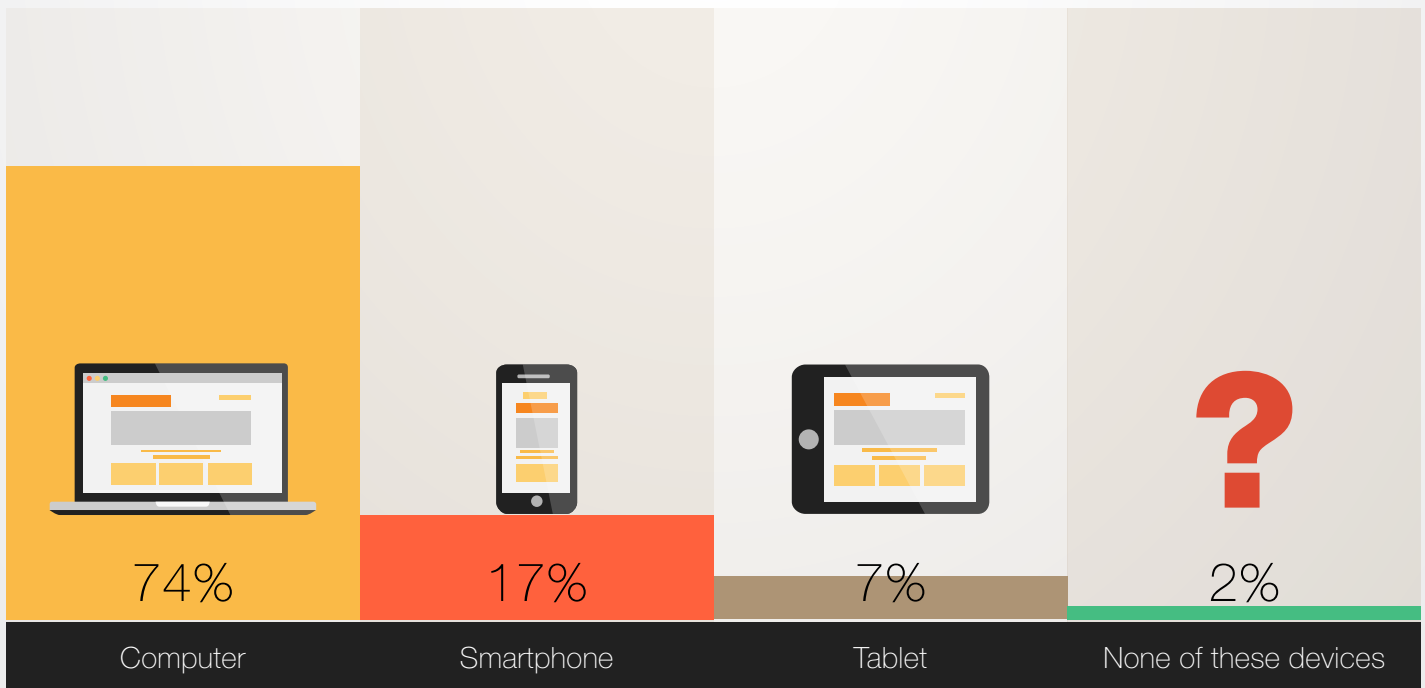
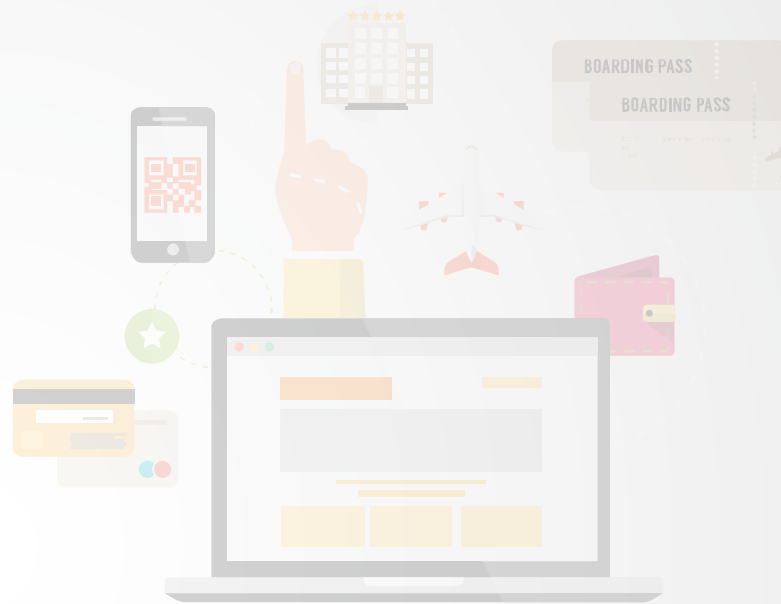
A decade ago, Singaporeans preferred to book their trips offline, with 73% turning to a local travel agent to lock down their travel, while only 36% did so online. This tendency has clearly changed as a whopping 89% of Singapore travellers indicate they book their trips online these days, with only 26% still using a local travel agent. This sets Singaporeans ahead of both Hong Kongers (84%) and Australians (78%) in the uptake of online booking. For Australians and Singaporeans, hotel or airline websites are the preferred platforms for booking travel, whereas Hong Kongers are more likely to use an OTA.

Where Singapore travellers turn to online platforms for booking, the use of OTAs increased from 17% to 64% over the last decade, with travel search engines also gaining popularity (7% versus 28%), pointing to a desire to independently search and compare prices. With the increasing number of online travel services, higher accessibility to the Internet across a variety of devices and raised consumer awareness, it comes as no surprise the booking habits of Singaporeans have been considerably influenced by these factors.



The majority of Singapore travellers are still more comfortable booking on their computer rather than mobile

Singapore travellers still prefer to turn to the computer to book their trips, with 74% using a computer rather than a smartphone (17%) or tablet (7%). A look at the age segments shows that the under 35 bracket are the most likely group to book trips on a smartphone (25%). Singaporeans may undertake the actual booking activity on a computer, as they see this as a more user friendly and secure method compared to mobile. However, it also indicates that Singapore travellers are less flexible and spontaneous when it comes to actually booking a trip.



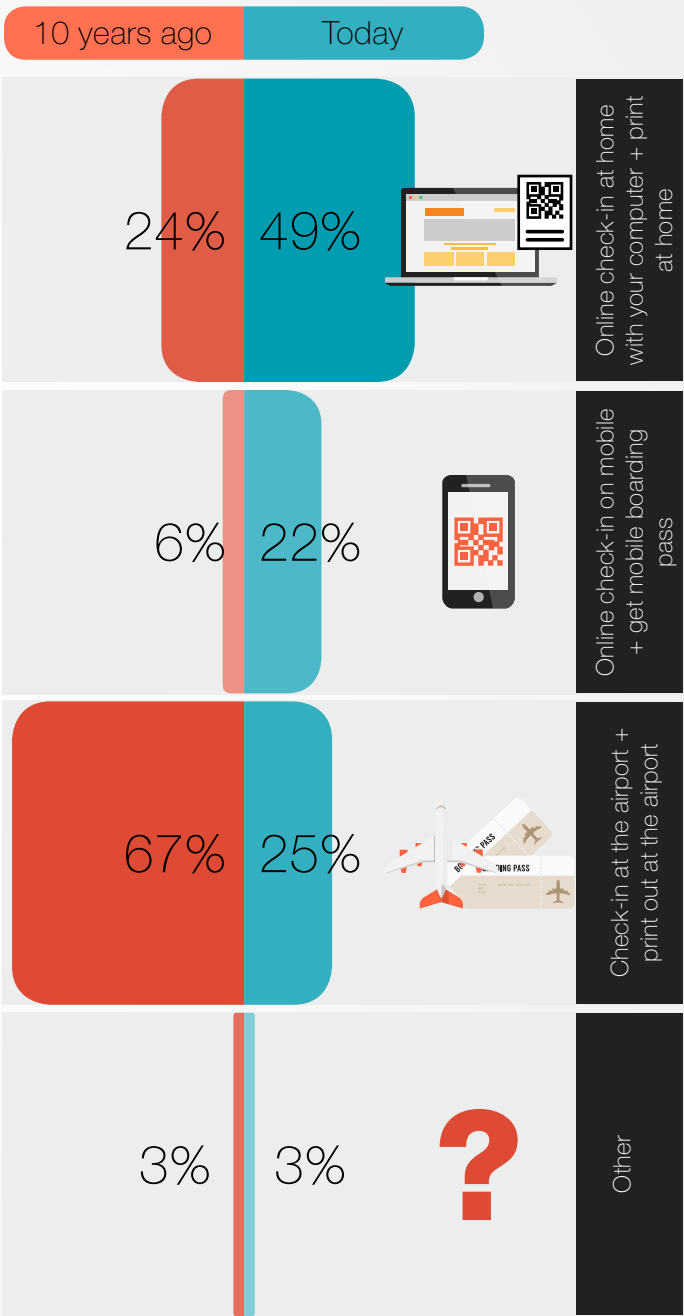
On-the-go:

Singaporeans still prefer printing their travel documents but share experiences via the digital world



Smartphone is not preferred for carrying boarding passes

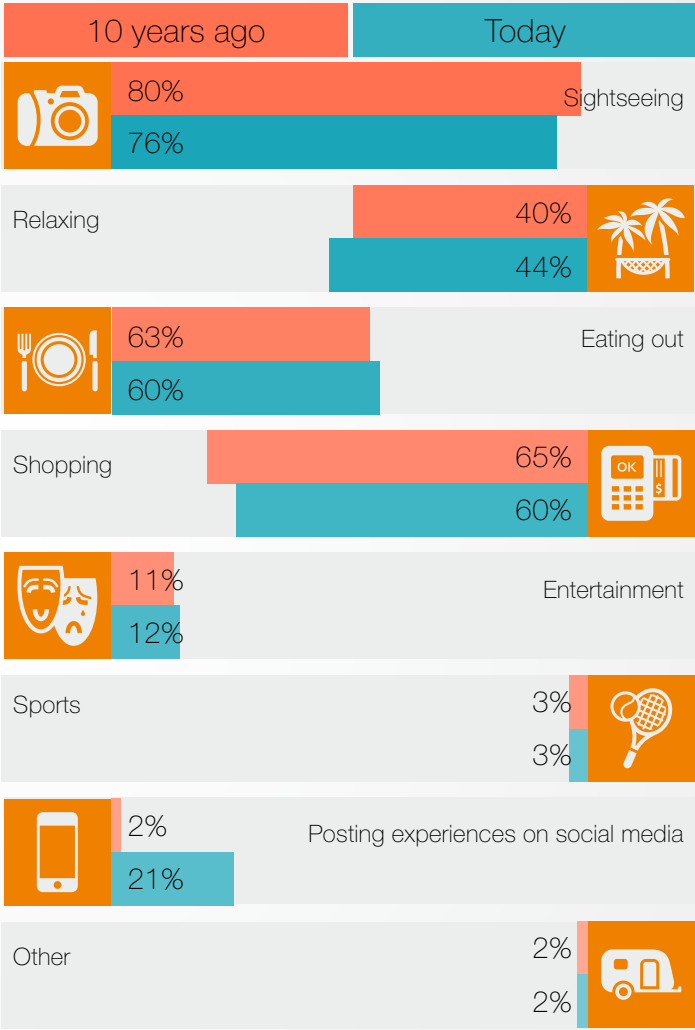
When checking in for a flight 10 years ago, 67% of Singaporeans commonly chose to do this at the airport, while 24% checked in online and printed their boarding pass at home. At the time, only a small number of Singapore travellers used their mobile device (6%) for checking in and carrying their boarding pass digitally. With technological advancement, this has changed markedly. These days almost half of Singaporeans (49%) check in online and print boarding passes at home. Checking in at the airport still remains popular, with 25% choosing this method. Almost one quarter (22%) of average Singapore travellers now choose to carry their boarding pass on their mobile after checking in on their smartphone these days which represents a significant increase compared to ten years ago.



Holiday habits have changed little in the last 10 years

Holiday habits of Singaporeans have changed little in the last decade, with sightseeing, eating out and shopping continuing to top the list. Singapore travellers clearly enjoy these leisure activities over sports, which came in at just 3%, indicating that Singaporeans categorise working out as an activity best done when at home. When it comes to shopping, Singaporean travellers these days are the most enthusiastic in the Asia Pacific region, with 60% enjoying this activity on holidays.

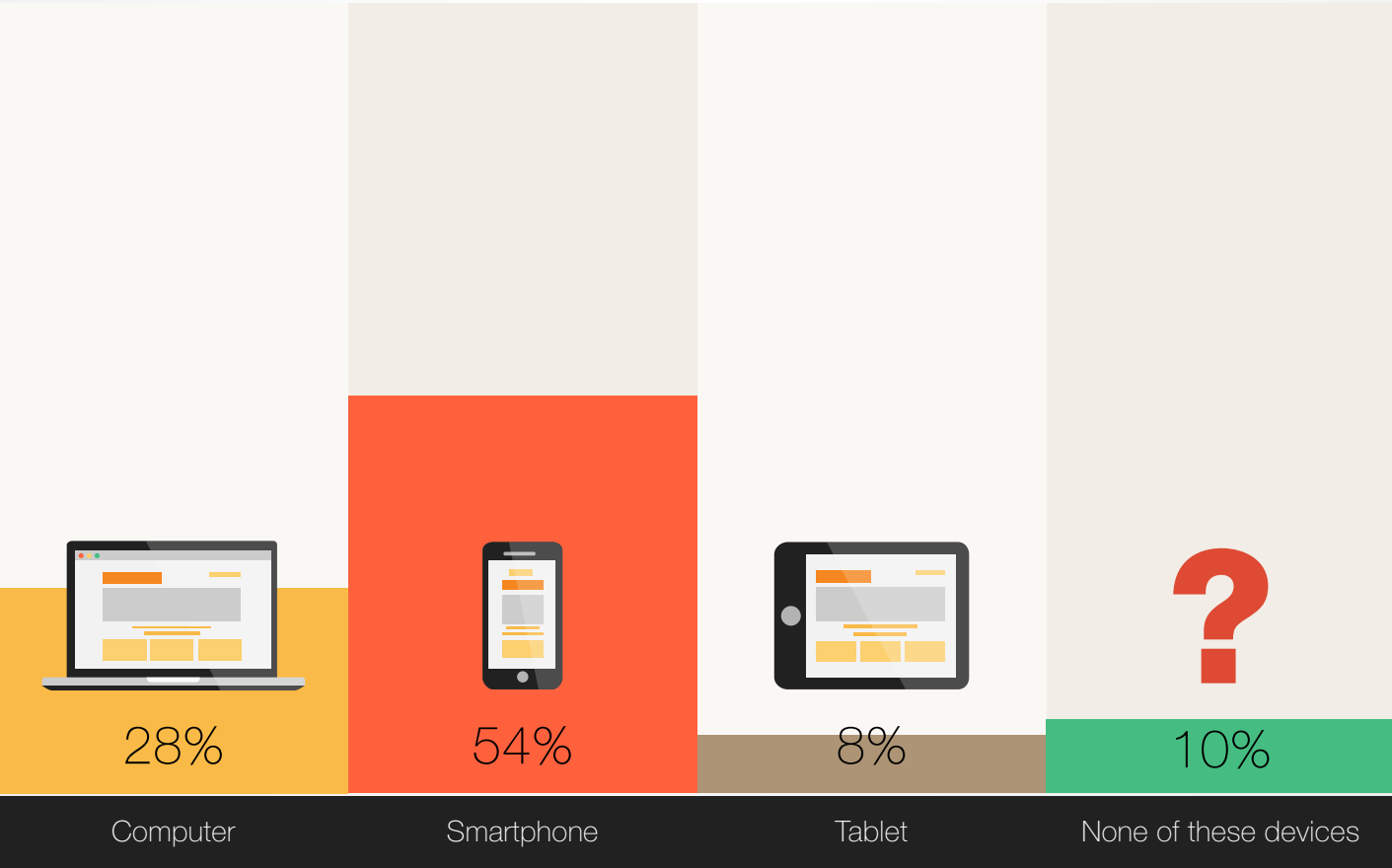
More Singaporeans today (21%) post on social media while travelling compared to a decade ago (2%). This trend is particularly apparent in the 18-24 year old group (34%), due in part to the number of social media channels available and a paradigm shift, but also attributable to the increase of access to the internet when travelling. Across APAC, Singaporean travellers (21%) are more likely on average to post experiences on social media than Australians (14%) or Hong Kongers (11%).



Mobile phones are almost as popular as computers for holiday leisure activities

For their holiday activities of choice, Singaporeans today are almost as likely to reach for a smartphone (54%), as a computer (28%). Amongst the younger generation (18-24 year olds), the smartphone (70%) is more popular than the computer (17%). It is simply more convenient to research and share on a mobile device while on-the-go, and this becomes obvious through the responses.

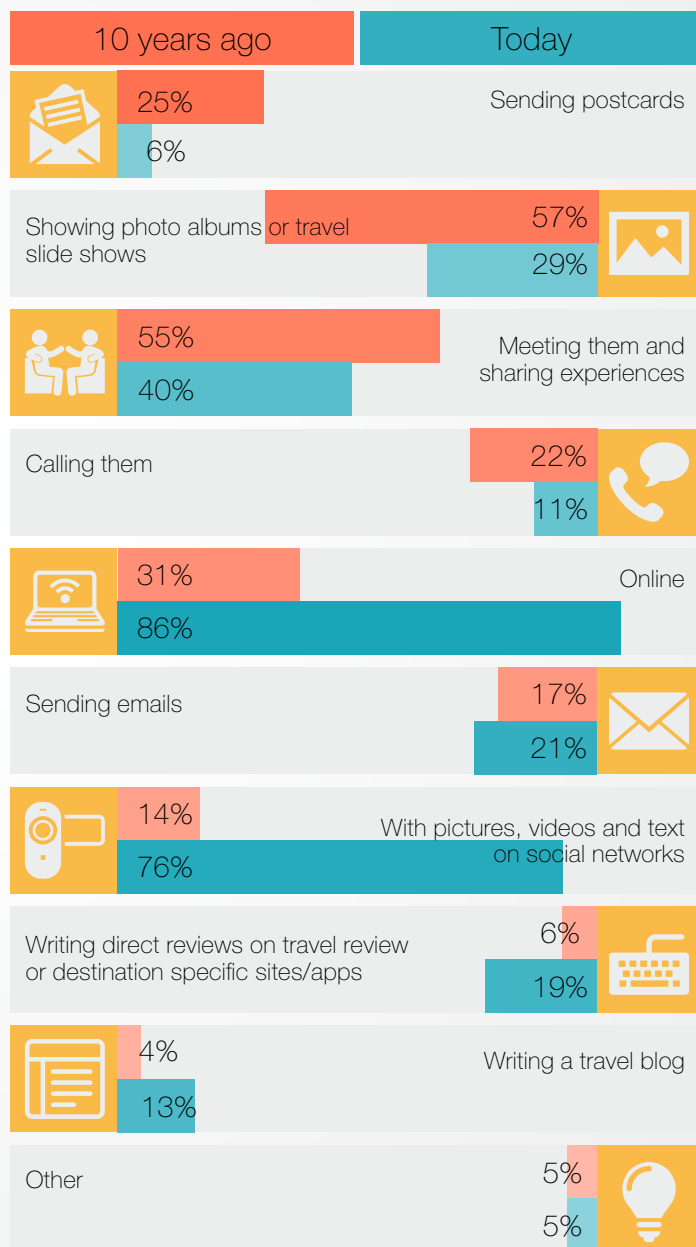
The average APAC traveller is far ahead of the average European traveller when it comes to using mobiles devices for their holiday leisure activities (42% versus 29%). A closer look reveals this is strongly driven by Singaporeans, with more than half indicating they use a smartphone for this purpose.



Sharing travel experiences using mobile devices is becoming a major habit for Singaporeans

Sharing travel experiences has changed most dramatically in the last decade. Old school photo albums or travel slide shows were the most popular way for Singaporeans to share travel experiences a decade ago (57%), with in-person meetups with family, friends and colleagues also topping the list (55%). At that time 31% of Singapore travellers were already sharing their experiences online, mainly via email (17%) or social networks (14%). These days, sharing experiences online is taking over, showing a rapid rise to 86% over the course of the decade, making it the most popular method by a long shot. In the younger segment (18-24 year olds) this is even more apparent, with almost the entire group (91%) sharing online first.

Instant forms of experience-sharing are the preferred choice for Singapore travellers, reflecting the response to the number of social channels, chat based apps and online sharing platforms now available. Singapore women are more eager to share their travel experiences on social channels than men (81% versus 71%), but are also more likely to share their experiences online in general with family and friends (89% versus 82%).



Sharing travel experiences using mobile devices is becoming a major habit for Singaporeans

Singaporeans prefer to use a smartphone (52%) to share travel experiences, rather than a computer (35%) or tablet (8%), with women being more likely to share holiday experiences on a mobile device than men. It is no surprise that those in the 18-24 age bracket are the most likely to choose the smartphone (69%), over the computer (24%) for vacation experience sharing, as they are more adapted to today's technological developments than the older generations.









Singapore Traveller Profiles



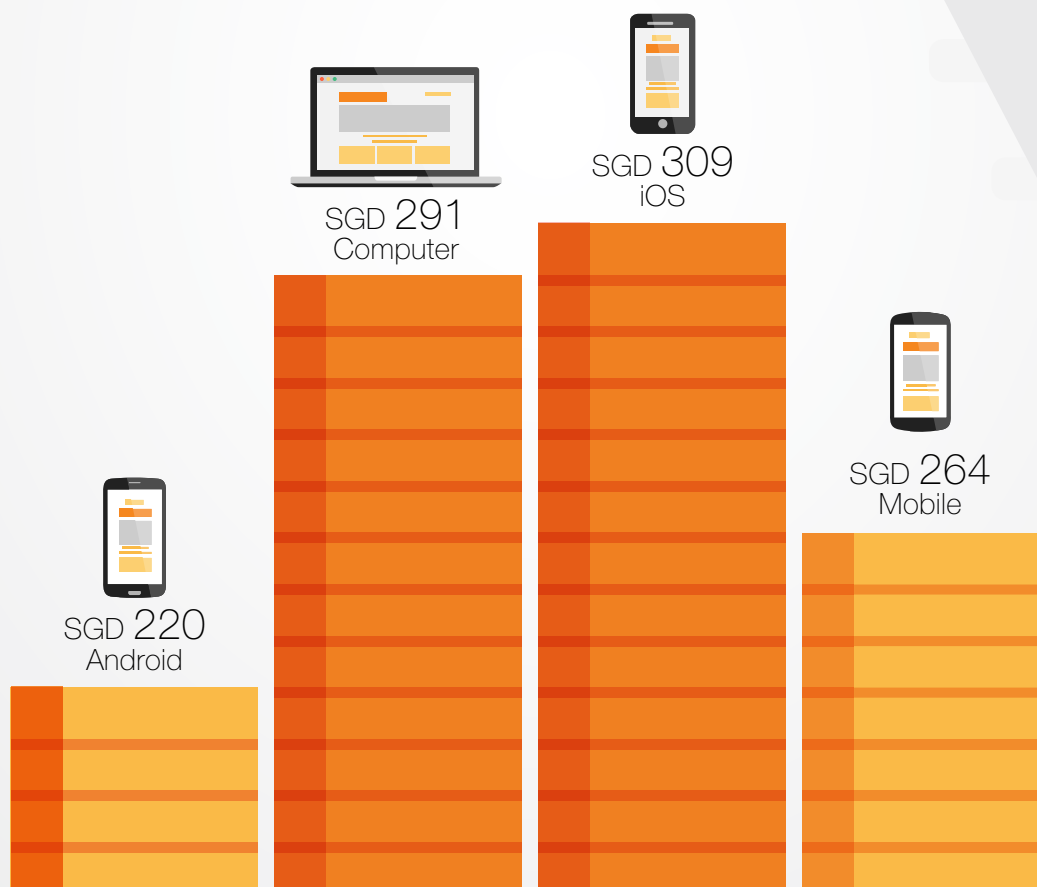
Travel trends: The most popular destinations differ depending on the device

The research has shown that Singapore travellers' favourite holiday destinations depend on the device they are using. While Bangkok is consistently the most popular destination searched for across all devices, in second position Android users favour Taipei, with computer and iOS users preferring Denpasar, Bali.

	 Android	 SGD	 iOS	 SGD	 Desktop	 SGD
01	Bangkok	179	Bangkok	193	Bangkok	193
02	Taipei	322	Denpasar	239	Denpasar	246
03	Hong Kong	244	Hong Kong	275	Hong Kong	285
04	Denpasar	214	Tokyo	659	Tokyo	658
05	Tokyo	643	Taipei	344	Phuket	218
06	Seoul	670	Phuket	210	Seoul	690
07	Manila	267	Seoul	670	Taipei	313
08	Phuket	169	Manila	254	Manila	267
09	Kuala Lumpur	79	Kuala Lumpur	83	Kuala Lumpur	117
10	Ho Chi Minh City	163	London	1228	London	919

Spending on the most popular destinations for flights: iOS users are the least price sensitive

Singapore mobile users spend 9% less than computer users on flights to the top 10 destinations. Between mobile users, iOS users tend to spend 41% more than Android users on average. When booking a trip to the top 3 destinations, Android users spend more on average than computer or iOS users, at SG\$249 as compared to SG\$241 and SG\$236 respectively.



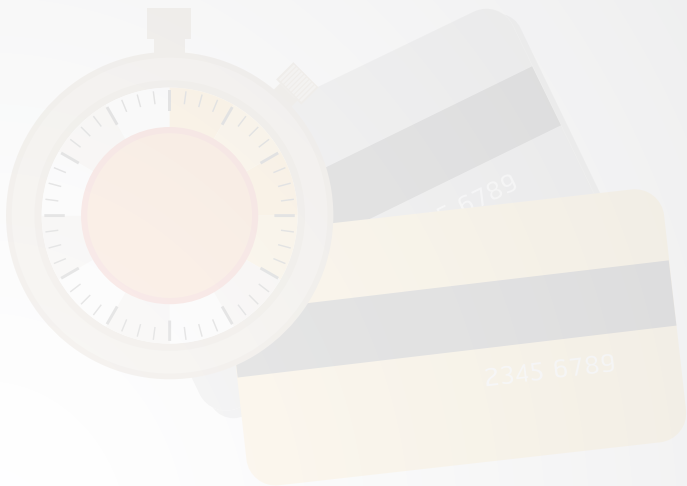
Hotel star ratings: searching from mid to high range is the norm

For hotels, Singaporeans on iOS are more likely to book luxury hotels than both Android and desktop users, with 71% of all searches being for 4 and 5-star hotels. Four-star hotels are the most popular category overall for users on all devices. Across APAC, Hong Kong desktop users are the most set on luxury, with 73% of bookings for 4 and 5-star hotels. APAC iOS users book more 4 and 5-star hotels than Android users in the same region.

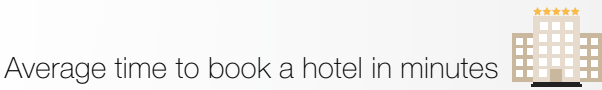


Booking decision: Singaporeans are more spontaneous on mobile than on their computer





Singapore Android and iOS users are faster on average than computer users when deciding which flight to book (5, 5 and 7 minutes respectively). Singapore mobile users are also 1 minute faster than desktop users when choosing a hotel to book, taking 5 minutes on average instead of 6. Singapore Android and iOS users are on par with Australian mobile users, with Hong Kong Android users the quickest in the region, coming in a 1 minute faster.



Average time to book a flight in minutes

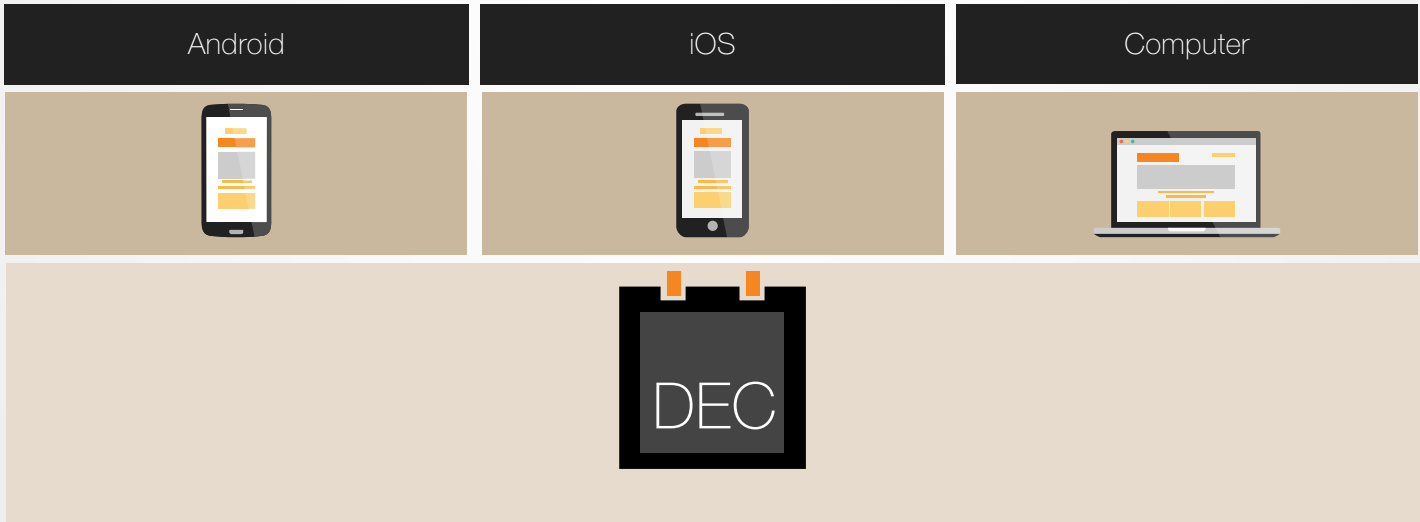
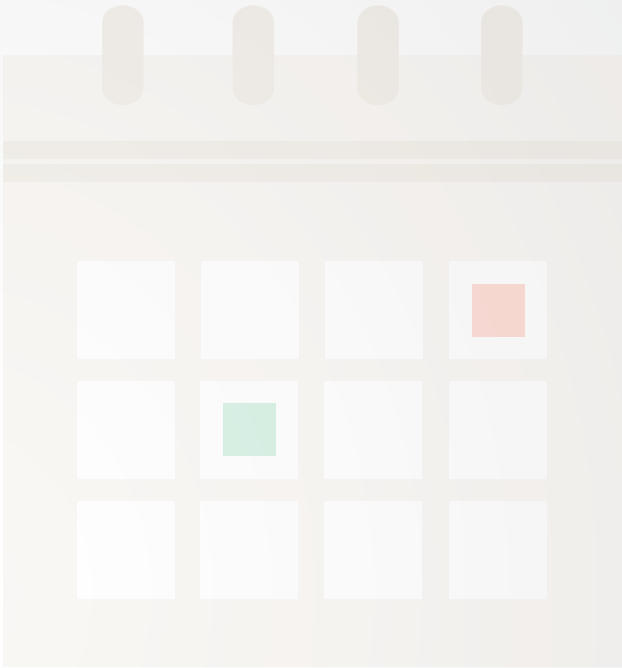


Average time to book a hotel in minutes

	07	Computer 	06	
	05	iOS 	05	
	05	Android 	05	
	05	Mobile 	05	

Busiest travel months differ according to device

Although users differ, there are also similar behaviours across devices. The first and second most popular months of travel for all users is December, then May. For computer and iOS users, April is the third best month to travel, while for Android users, jetting off in November is the third best option.



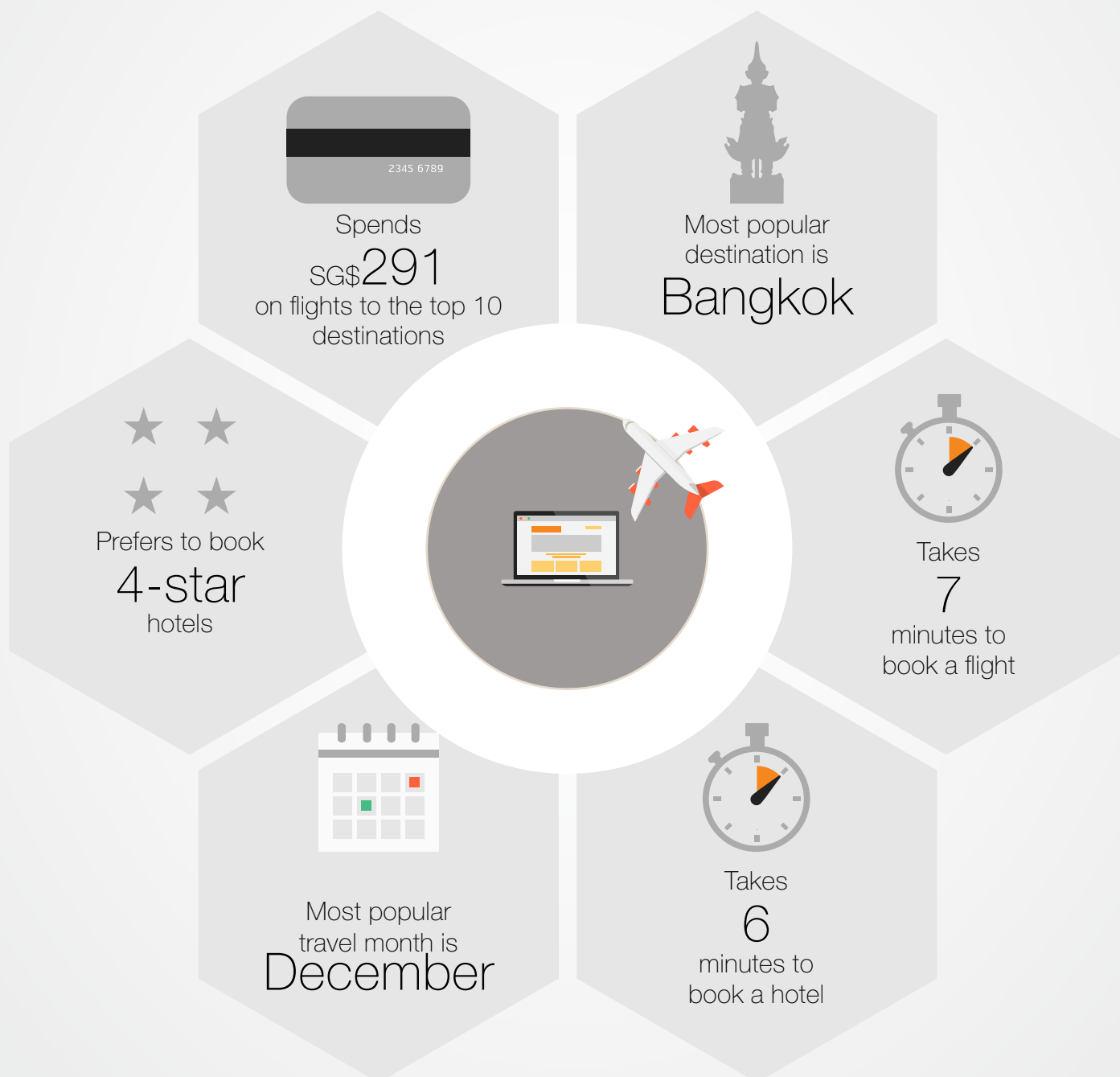
iOS Traveller Persona



Android Traveller Persona



Computer Traveller Persona





Survey OpinionWay for KAYAK: The report is based on survey findings in cooperation with OpinionWay, conducted across 12 countries and regions in Europe (United Kingdom, Germany, Austria, Switzerland, Spain, Italy, Poland, Russia, France) and Asia Pacific (Singapore, Hong Kong, Australia), with samples of 1000 respondents per country.

Mobile Traveller Profiles and resulting Traveller Personas are based on flight and hotel searches and clicks made on KAYAK.sg for travel in 2015.

www.kayak.sg