



The Mobile Consumer Ahead

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- 
- A black and white photograph of a long, arched tunnel. The tunnel has a series of repeating arches on the sides, creating a sense of depth. A person is walking away from the camera towards a bright light at the end of the tunnel. The floor is wet and reflective, showing the arches and the person. The walls are made of rough, textured concrete.
1. Mobile consumer behavior & trends
 2. Ideas for your mobile strategy
 3. Putting it into perspective: Benchmarks

THE CONSUMER CONUNDRUM



Travelers are moving faster

*And connected to more
people and services
than ever before...*

SHARING EXPERIENCES

A nighttime photograph of the Chain Bridge in Budapest, Hungary. The bridge is illuminated with warm lights, and its reflection is visible in the Danube River. In the background, the Hungarian Parliament Building is lit up, with its central dome and wings clearly visible against the dark sky.

*Broadcasting their
location and activities*

TRAVELING TO MORE CITIES AROUND THE WORLD

*With mobile connectivity
to keep them plugged in
to what's happening
back @ the office*



AND MIXING BUSINESS WITH PLEASURE

***#ShouldBEaThing** , right!?*



But not long...JUST 10 Years ago



- **Only 5 %** of Households had broadband
- **WIFI** was rare
- Social Media **didn't exist**
- **Only 50%** of people had a mobile phone
- iPhones were still **Three years in the future**

A photograph of a paved road winding through a dense forest. The sun is shining brightly from behind the trees in the distance, creating a strong lens flare and illuminating the scene with a warm, golden light. The road has white dashed lines and curves to the right. The trees are tall and leafy, with some foliage showing signs of autumn color.

AND TODAY...

*It's hard to find places
without connectivity and
people are social in
radically different ways*

A GROWING DEMOGRAPHIC

44% of the world's
population is under 24 –
all born in the digital age

*Did not have to transition
to mobile*

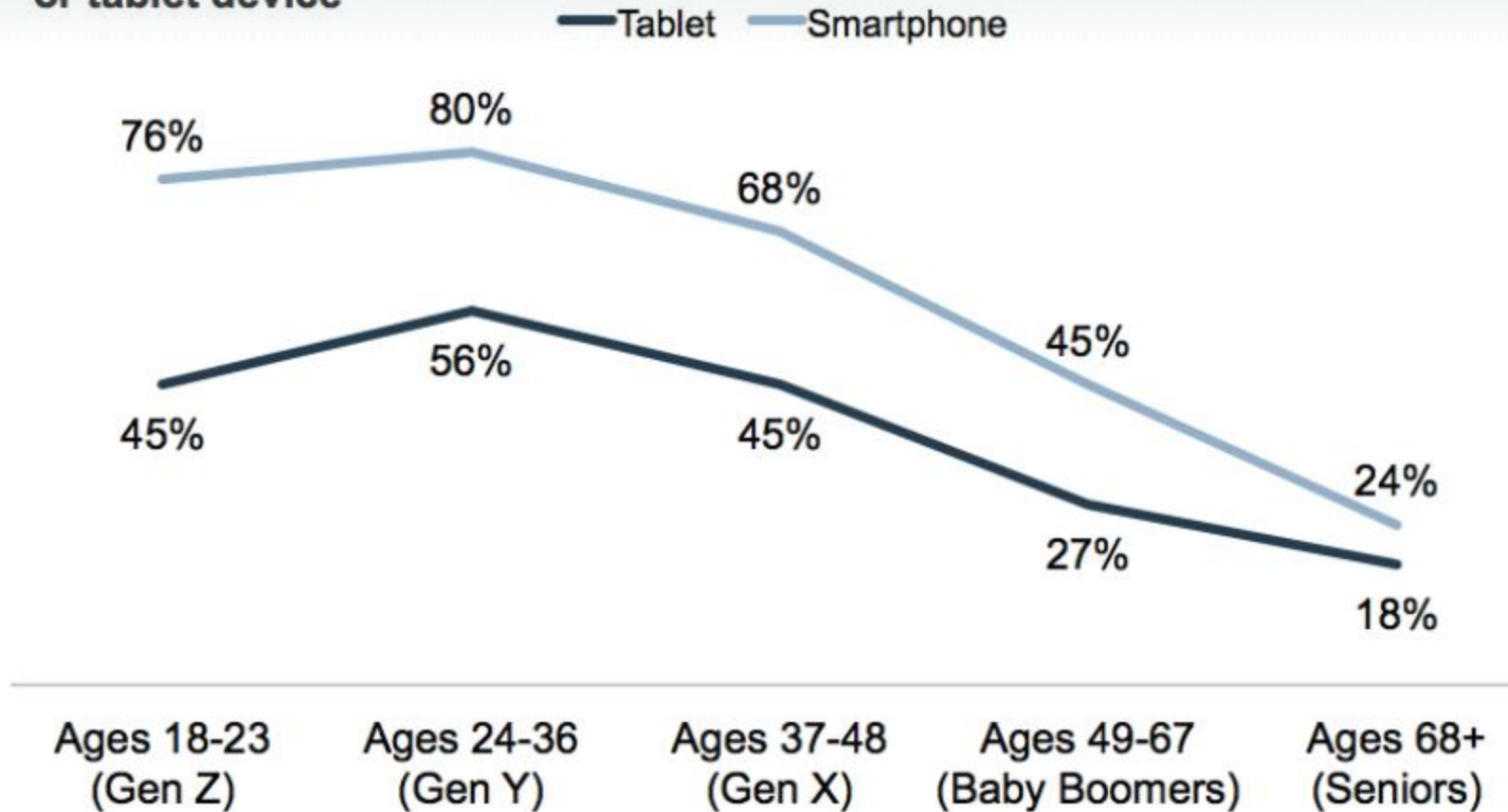


A NEW GENERATION GROWING UP WITH THIS TECHNOLOGY



GEN-Y TRAVELERS LEAD MOBILE TRAVEL ADOPTION

Percent of travelers in each age group who owns and uses a smartphone or tablet device



Source: Hudson Crossing

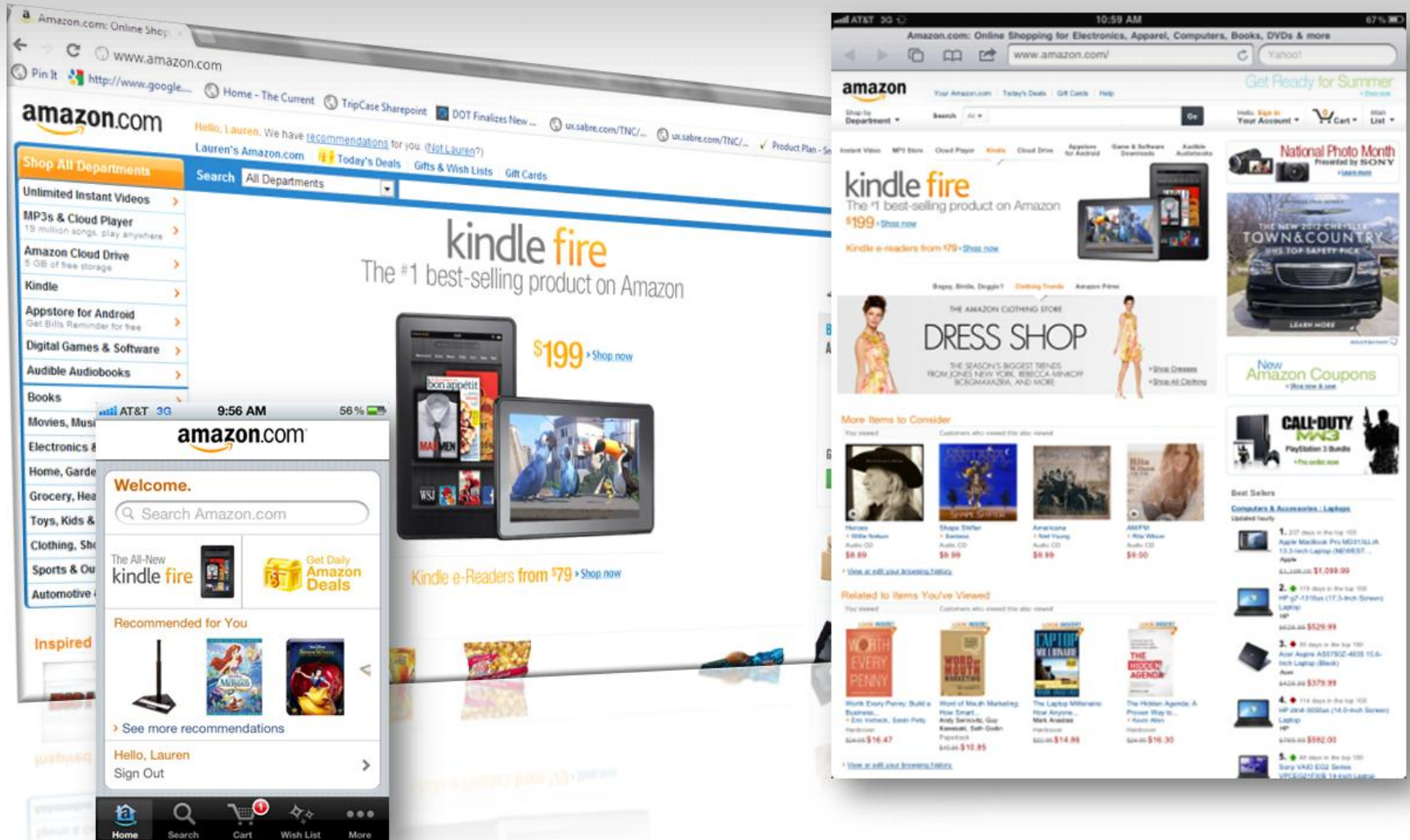
A photograph of an empty airport terminal. Rows of metal airport-style seating are arranged on both sides of a wide, polished floor. Large glass windows in the background let in natural light, creating a bright but somewhat desolate atmosphere. The ceiling features modern, circular lighting fixtures. The overall scene conveys a sense of waiting and solitude.

THEY EXPECT EASY...AND
HATE TO WAIT

THEY EXPECT A FRICTIONLESS
EXPERIENCE



AS Evidenced BY THE MOST Successful BRANDS



WITH THOSE SAME BRANDS NOW PROVIDING TRAVEL SERVICES

+You Search Images Maps Play YouTube News Gmail Drive Calendar More -

hotels in new york

SIGN IN

Web Images Maps Shopping More Search tools

Hotels in New York, NY

18	20	19	19	19	19	24	21	18	11	19	16
451 reviews	82 reviews	71 reviews	243 reviews	89 reviews	55 reviews	75 reviews	171 reviews	72 reviews	330 reviews	10 reviews	58 reviews
W New York 541 Lexington Ave	Courtyard New York Manhattan 181 Varick St	New York Skyline Hotel 725 10th Ave	New York Marriott Downtown 85 West St	The Jane Hotel 113 Jane St	Four Points by Sheraton Manhattan 66 Charlton St	The NoMad Hotel 1170 Broadway	W New York - Downtown 123 Washington St	Washington Square Hotel 103 Waverly Pl	New York's Hotel Pennsylvania 401 7th Ave	Colonial House Inn 318 W 22nd St	The Hotel Wolcott 4 W 31st St

Ads related to hotels in new york ⓘ

New York Hotels - Expedia - Best Hotel Price Guaranteed
www.expedia.com/New_York_Hotels - ★★★★★ 17,850 seller reviews
Book Now & Save on New York Hotels!

500 Hotels in New York - Half-Price Hotels - booking.com
www.booking.com/New-York-Hotels - ★★★★★ 2,545 seller reviews
Book your Hotel in New York online

Hotels in New York, NY on Google Sponsored ⓘ
Compare hotels based on reviews, prices, photos, Street View and more.

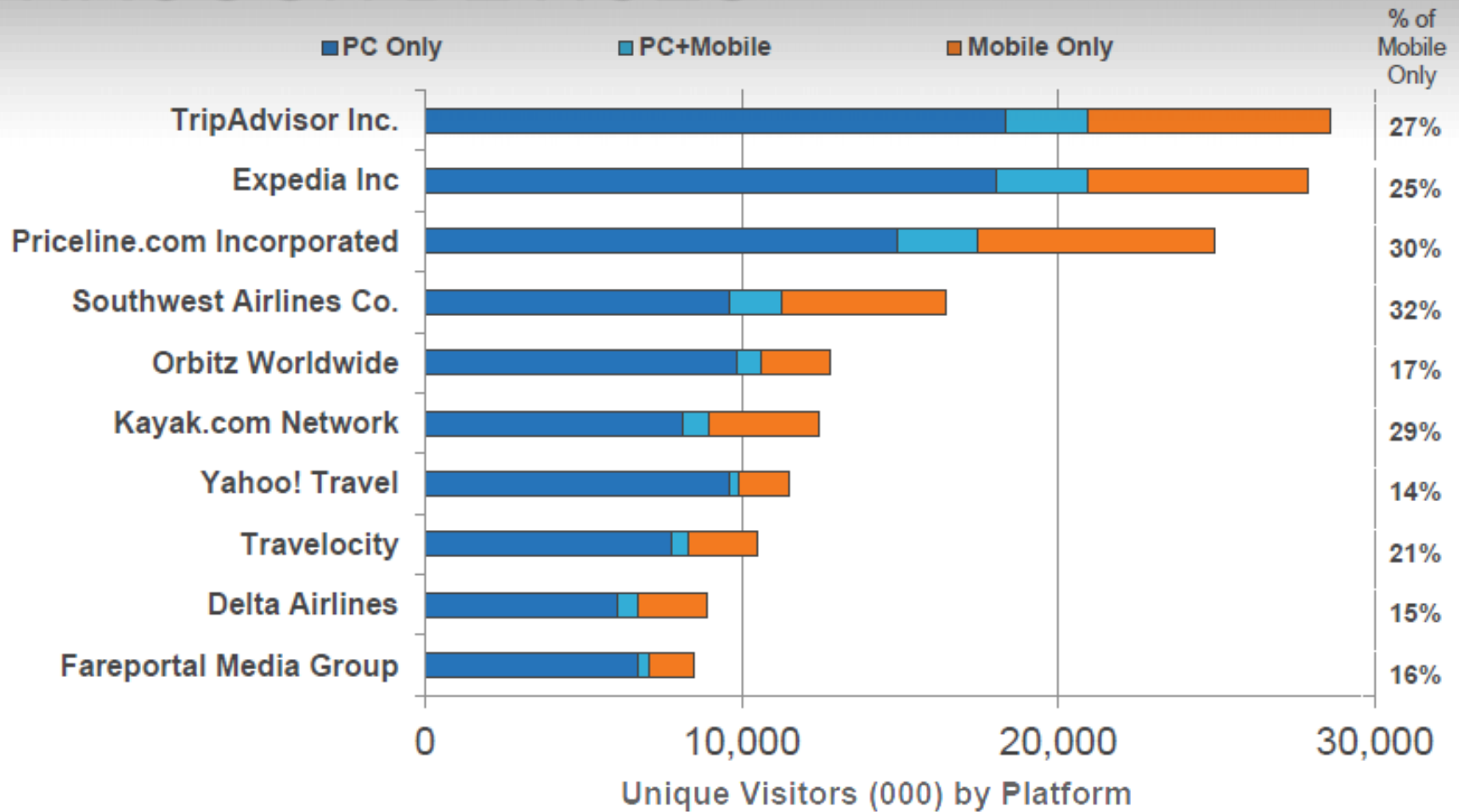
Price	Hotel Name	Star Rating	Score	Reviews
\$128	Holiday Inn Express New York...	2-star	Score: 21 / 30	15 Google reviews
\$200	The Jewel Facing Rockefeller C...	3-star	Score: 22 / 30	21 Google reviews
\$217	The New York Palace	4-star	Zagat: 25 / 30	281 Google reviews
\$524	The Plaza	5-star	Zagat: 25 / 30	368 Google reviews

Map for hotels in new york

21% of traffic now from mobile devices
(7% tablets & 14% mobile phones)

Source: Google March 2013

AND EXTENDING THEIR PRESENCE THROUGH DEVICES



Source: comScore Media Metrix Multi-Platform,
March 2013

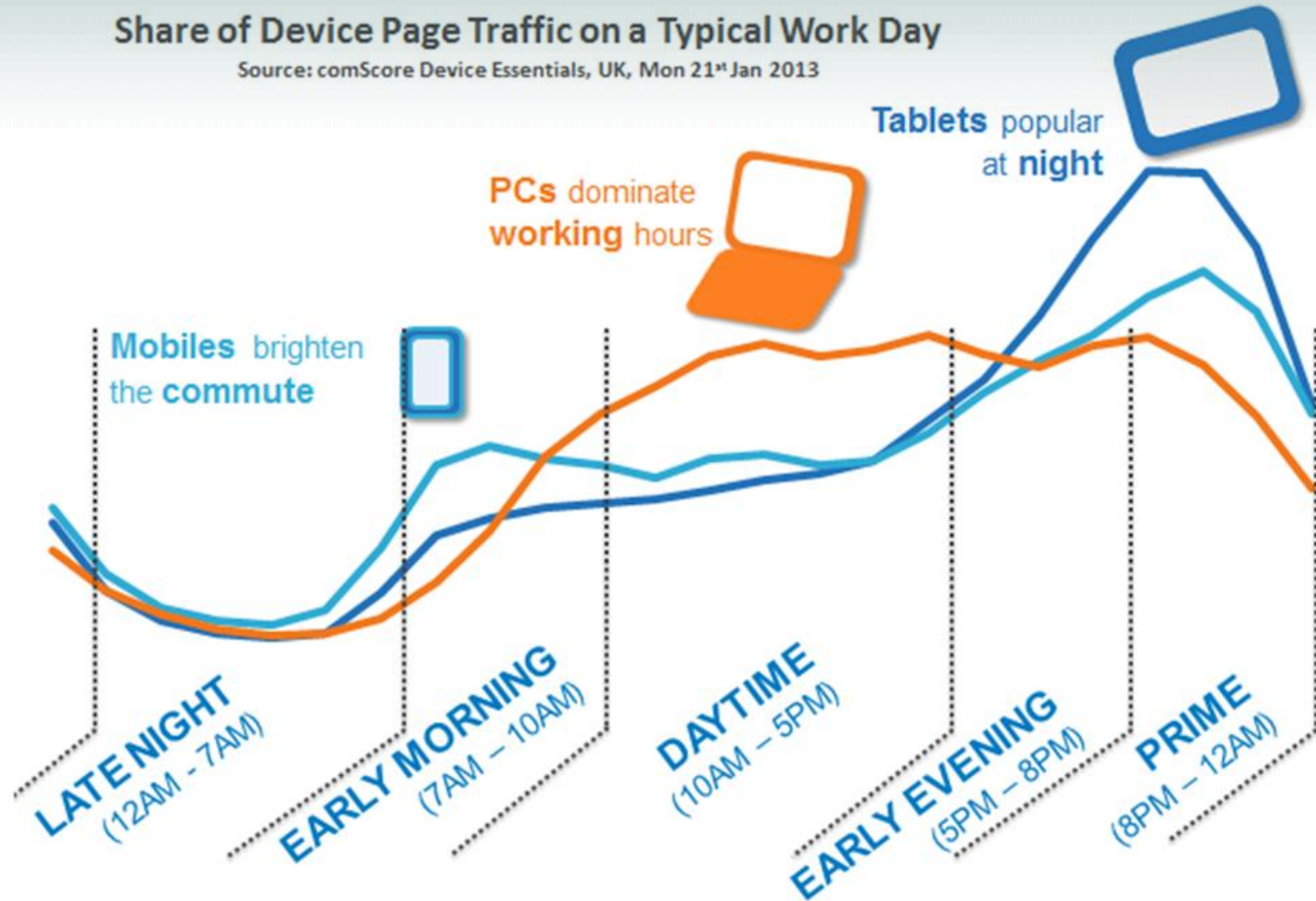
IT'S THE "COUCH AND FEEL" EFFECT



DEVICES CHANGE THROUGHOUT THE DAY

Share of Device Page Traffic on a Typical Work Day

Source: comScore Device Essentials, UK, Mon 21st Jan 2013



Source: ComScore DataGem

DEVICE AGNOSTIC

A young girl with long blonde hair in pigtails and black-rimmed glasses is lying on her stomach on a green shaggy rug. She is wearing a white long-sleeved shirt, a red tie, and a dark vest. She is holding a tablet with both hands and looking at the screen with a smile. The background is a warm, orange-toned room with wooden paneling and a white speaker visible on the right.

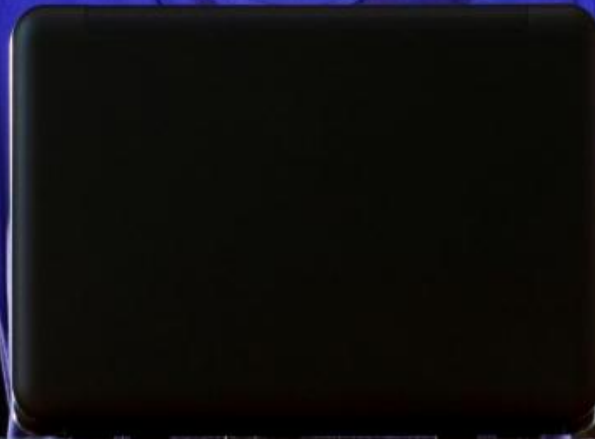
43% of people now
go between devices

A SOCIAL GENERATION



HOTEL SEARCHES ON PCS ARE FALLING in 2013

In 2013, hotel related travel inquiries will fall by 4% on desktop PCs, but rise on tablets by 180% and rise on mobile by 68%



Source: EyeForTravel, March 2013

HOTEL BOOKINGS IN CARS?

A man with short dark hair and a beard is driving a car. He is wearing a blue denim shirt under a grey sweater. He is looking down at a small device in his hand, which is resting on the steering wheel. The car's dashboard and steering wheel are visible. The background is blurred, suggesting motion.

43% of people booking hotels on their mobile devices using Priceline are now doing so in their cars

Source: Priceline November 2012

MANY MOBILE BOOKINGS ARE FOR TONIGHT

A man in a dark suit and striped tie is smiling and looking down at a mobile phone he is holding in his right hand. He is standing in front of a modern building with a glass facade and a grid-like structure. The background is a low-angle shot of the building, making it appear to rise steeply into the sky.

70% of Expedia mobile bookings were for hotel stays within 24 hours

Source: Harris Interactive

MANY MOBILE BOOKINGS ARE FOR TONIGHT



Last-minute deals on great hotels
instantly from your phone

- 91% have never stayed @ the property
- 1/2 wouldn't have stayed in a hotel
- 40% business travelers
- 28 cities now included

Source: Sam Shank, via Internet Retailer

TRAVELERS ARE GOING STEALTH



THE INVISIBLE GUEST



BOOKS ONLINE

CHECKS IN VIA MOBILE



USES ROOM SERVICE



**HAS EXTENSIVE
KNOWLEDGE OF THE AREA**



Source: IHG The New Kinship Economy

USING SOCIAL: TO PLAN

1 IN 4
TRAVELLERS

**HAVE USED SOCIAL
NETWORKING SITES TO
PLAN THEIR TRAVEL**



Source: IHG The New Kinship Economy

USING SOCIAL: TO SHARE

**SOCIAL MEDIA HAS CHANGED HOW WE SHARE OUR
HOLIDAY EXPERIENCES - NOW IT'S ALL ON SHOW**



Source: IHG The New Kinship Economy

USING SOCIAL: To DISCOVER





mobile was the catalyst for digital convergence

A new “On-the-go” target for MARKETERS



DRIVING FRUSTRATION FOR Marketers



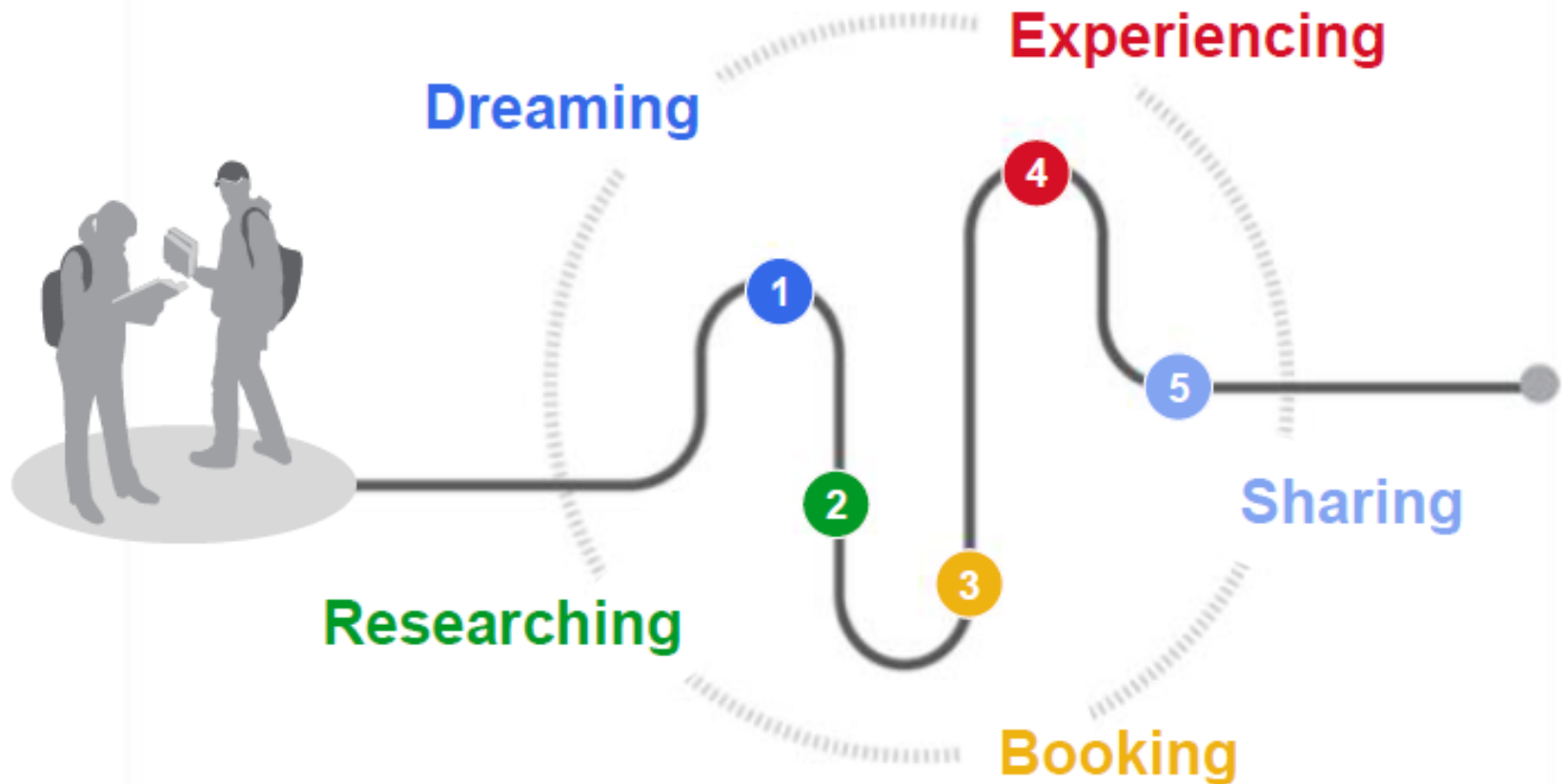
AND frustration for SUPPLIERS



So what should I be DOING?

- Distribution
- Search
- My website
- Multiple devices
- Guests going stealth

Planning a journey can take longer than the actual trip



Lead the traveler back to your site when they're ready to book



- Organic Search
- Remarketing
- Paid Search Advertising
- Social Media
- Local Directories
- OTAs
- Meta Search

All available on Mobile

Mobile: Channel or Platform?



Travel device experiences still underperform

What should travel brands do to improve their [device] experience?



Speed

“I’d say speed is key. I want the sites I use on my phone to be fast”



Design

“I wish the websites would change their look or formats to be more suited to tablet and phone use”

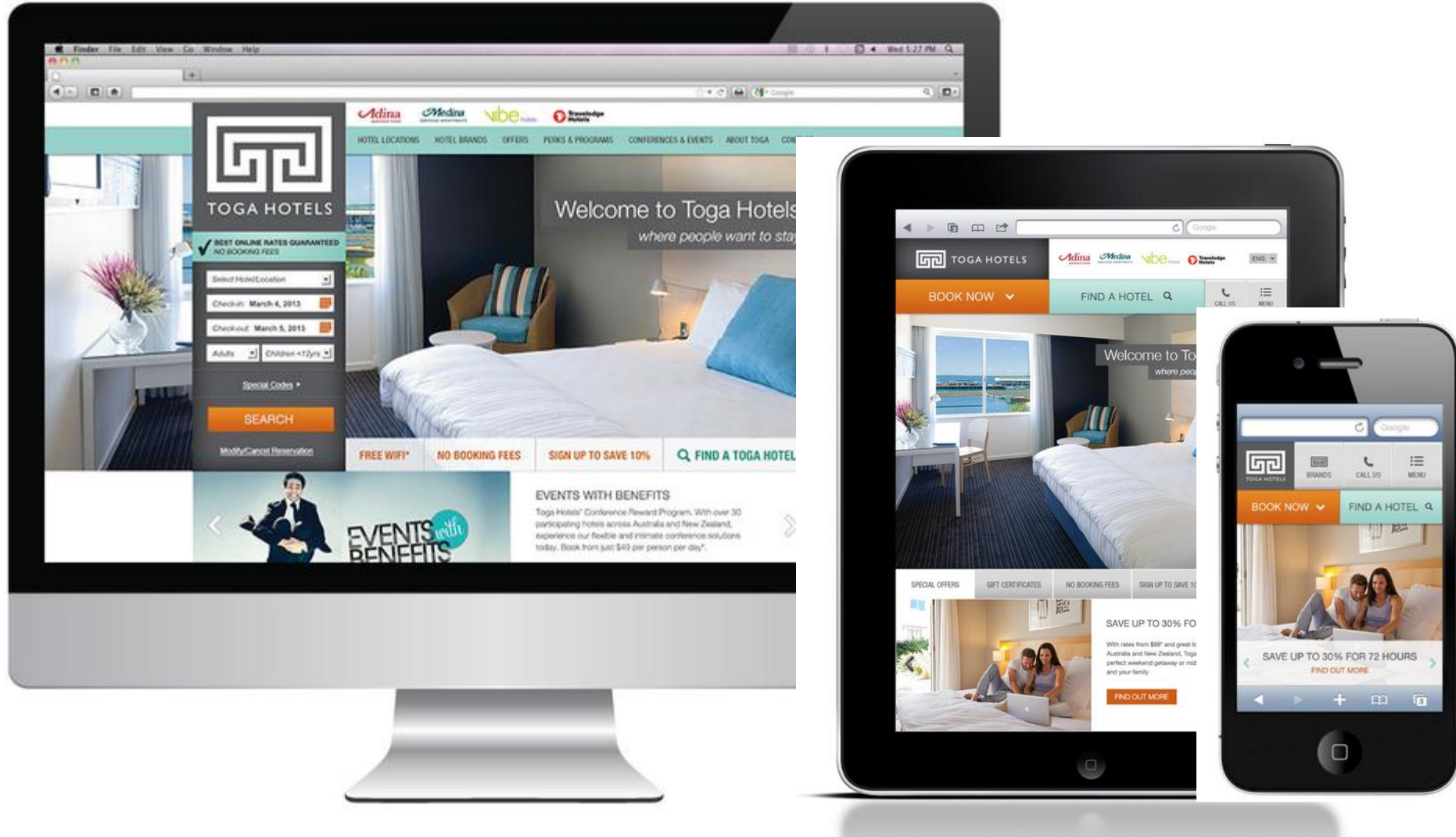


Action

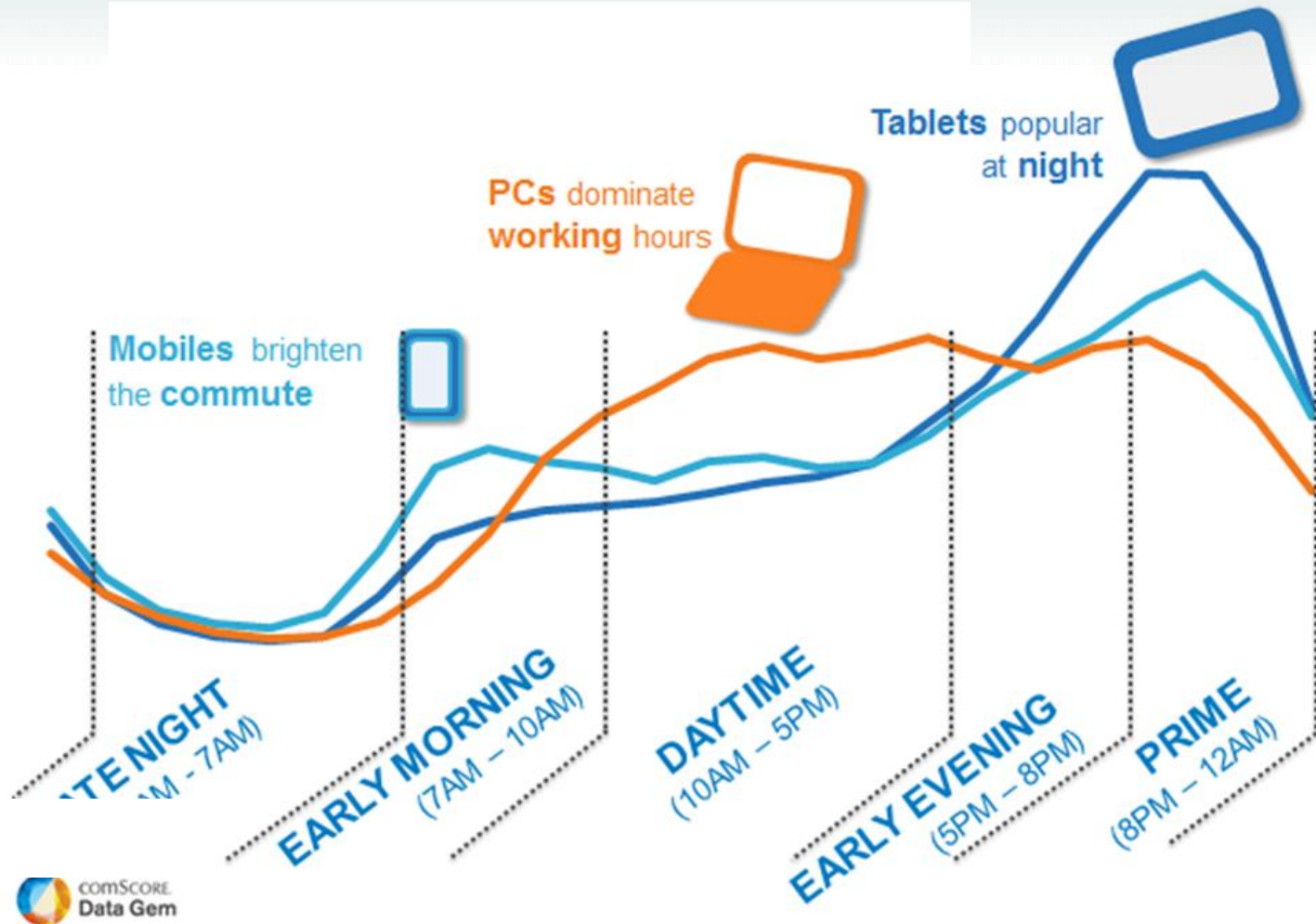
“I would use [my tablet] for everything if it was more compatible with sites I frequent”

Google commissioned Ipsos MediaCT travel study Aug 2013

Device Responsive vs. Device Specific



Mobility vs. Mobile: What is the consumer trying to do?



Mobile must have

Easy to Book

BOOK NOW ▾

Prominent Imagery



SAVE UP TO 30% FOR 72 HOURS

FIND OUT MORE

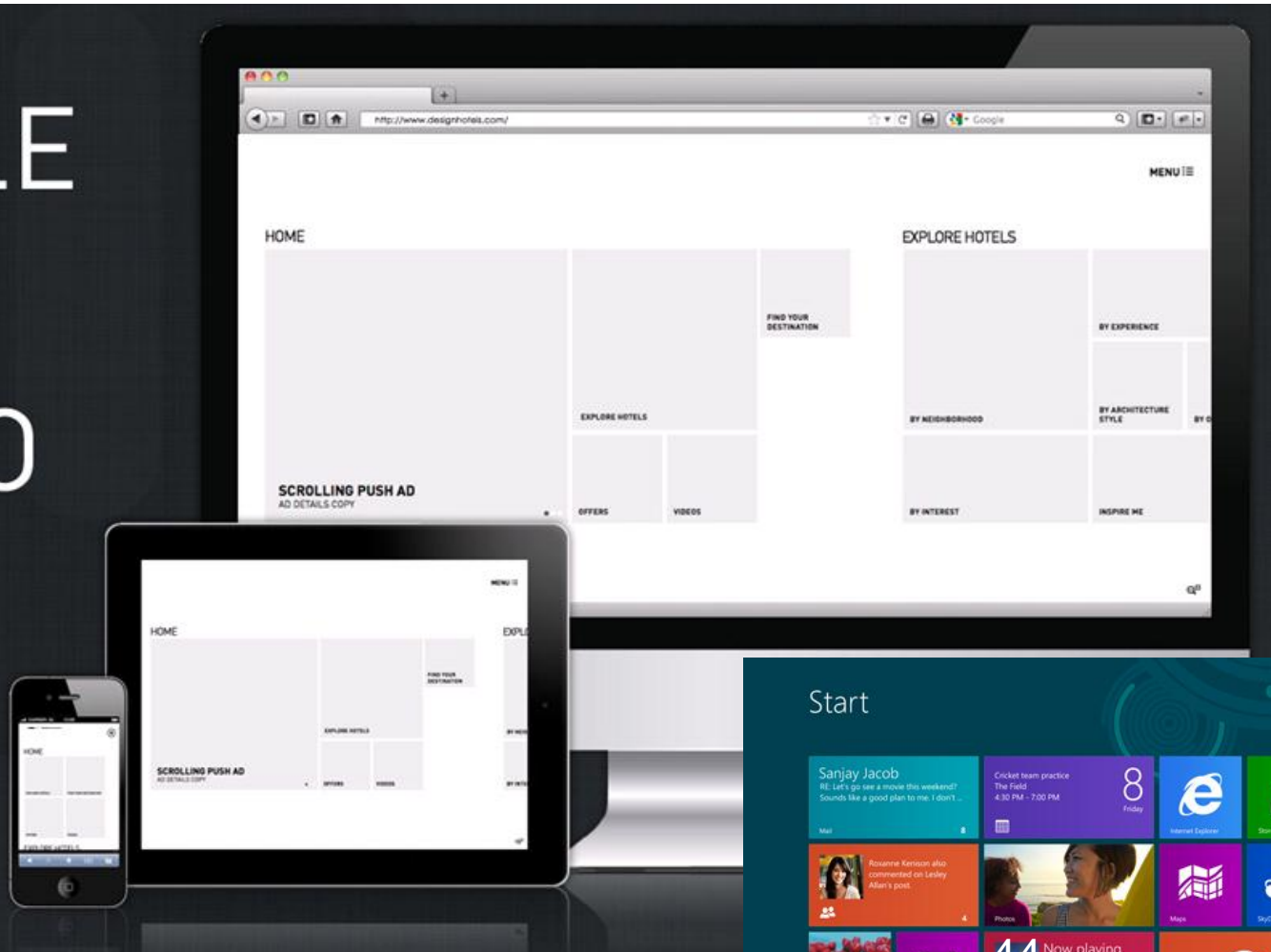
CALL US

Easy to Call

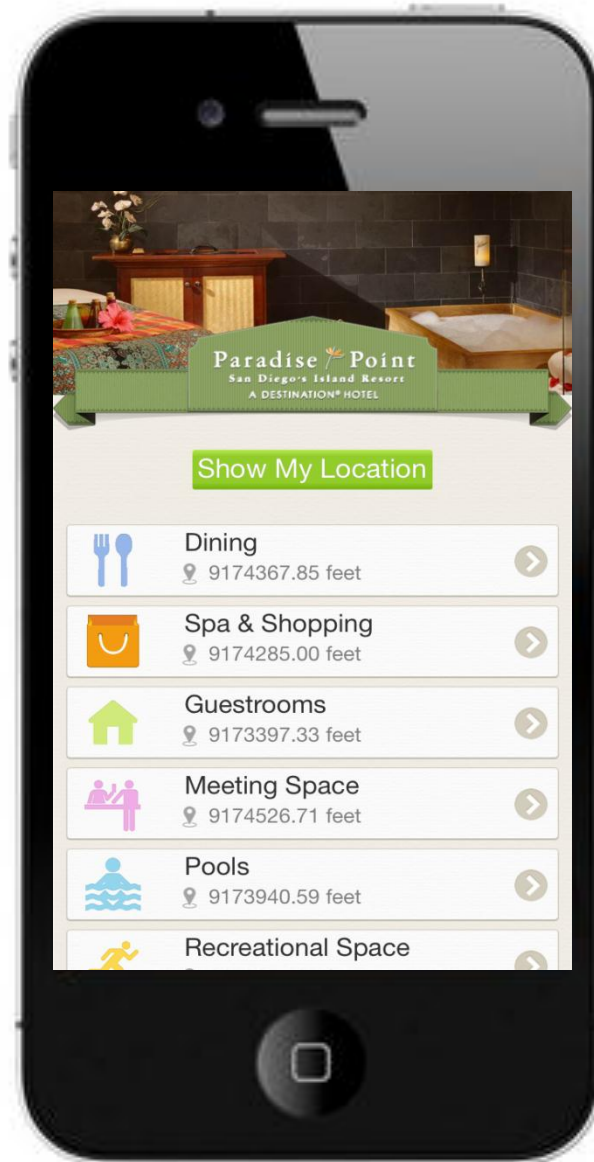
Promotions

If you can: Mobile First & Fully Responsive

DESIGNING MOBILE FIRST WITH METRO



What about Apps?



Mobile website strategy considerations

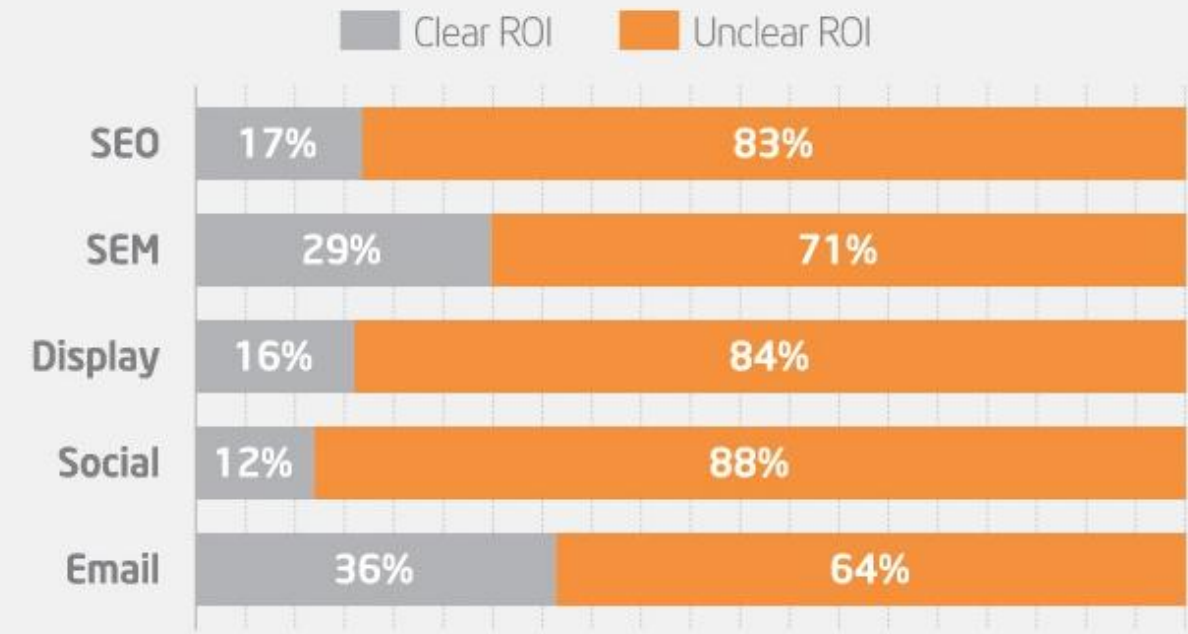


1. Content
2. Budget



How am I doing?

Marketing ROI remains elusive



Webmarketing 1/2/3 survey of 500 digital marketers 2014 plans and challenges



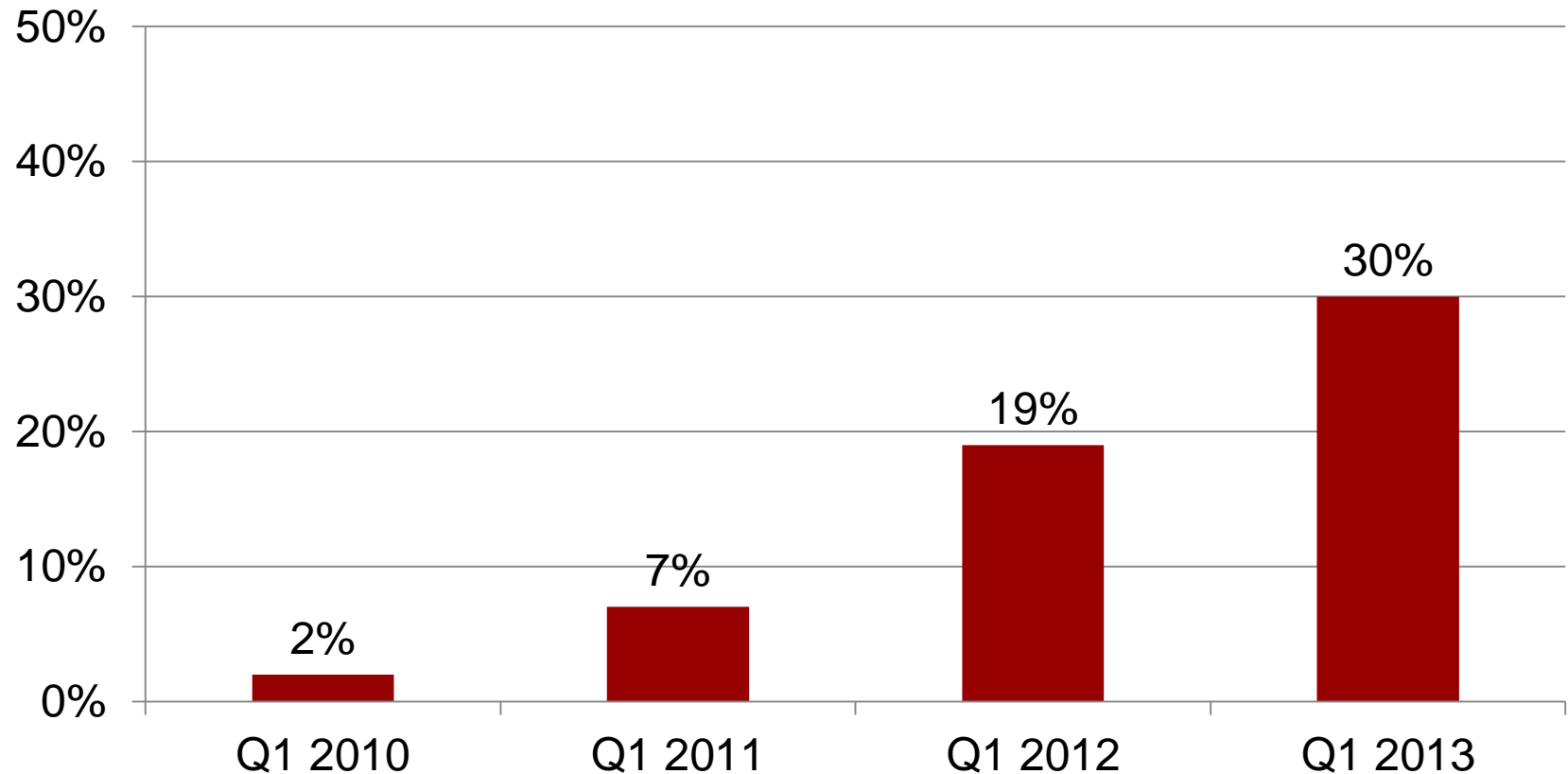
don't know which channel delivers the best leads



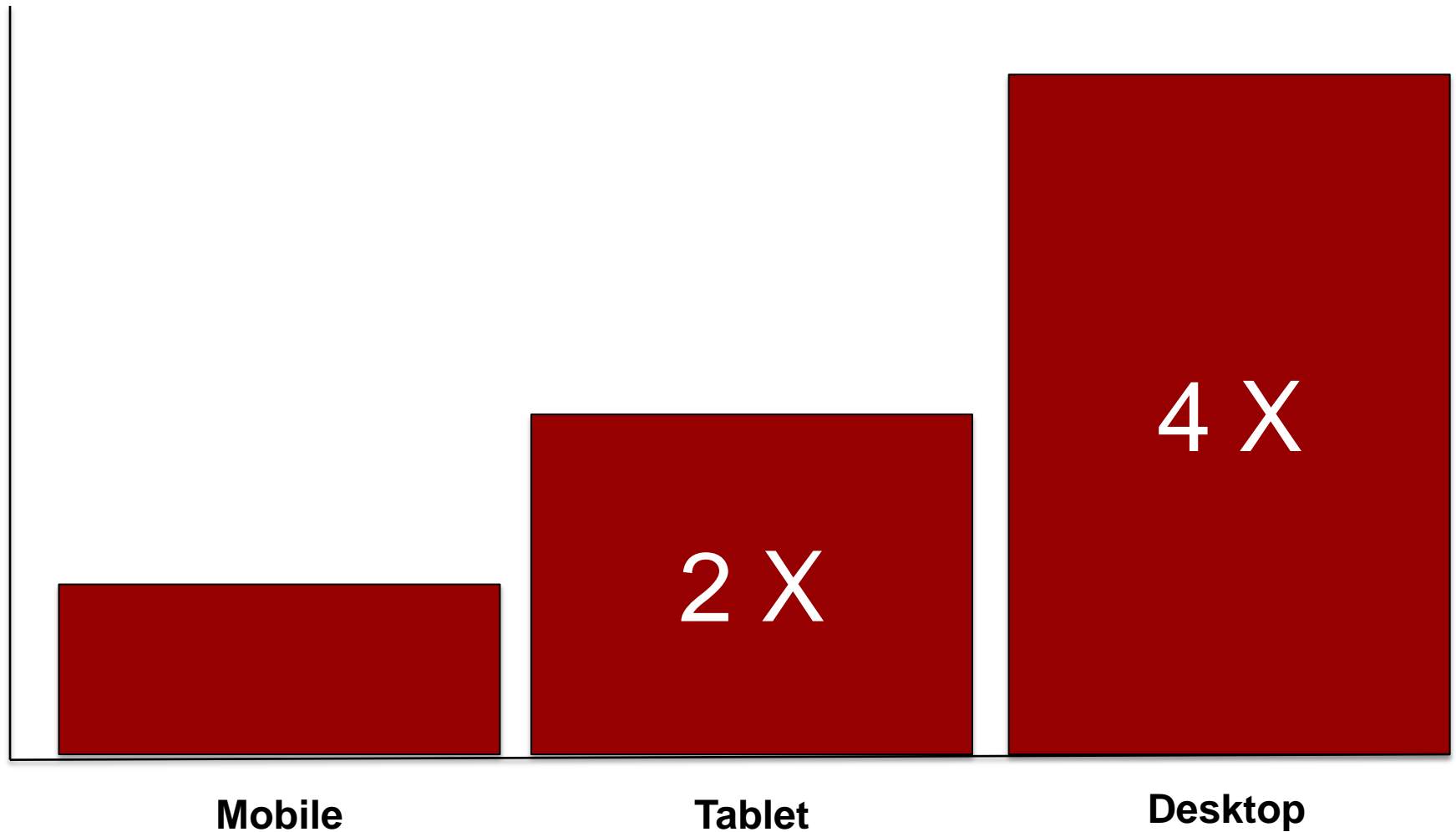
33%

don't know which channel generates the most revenue

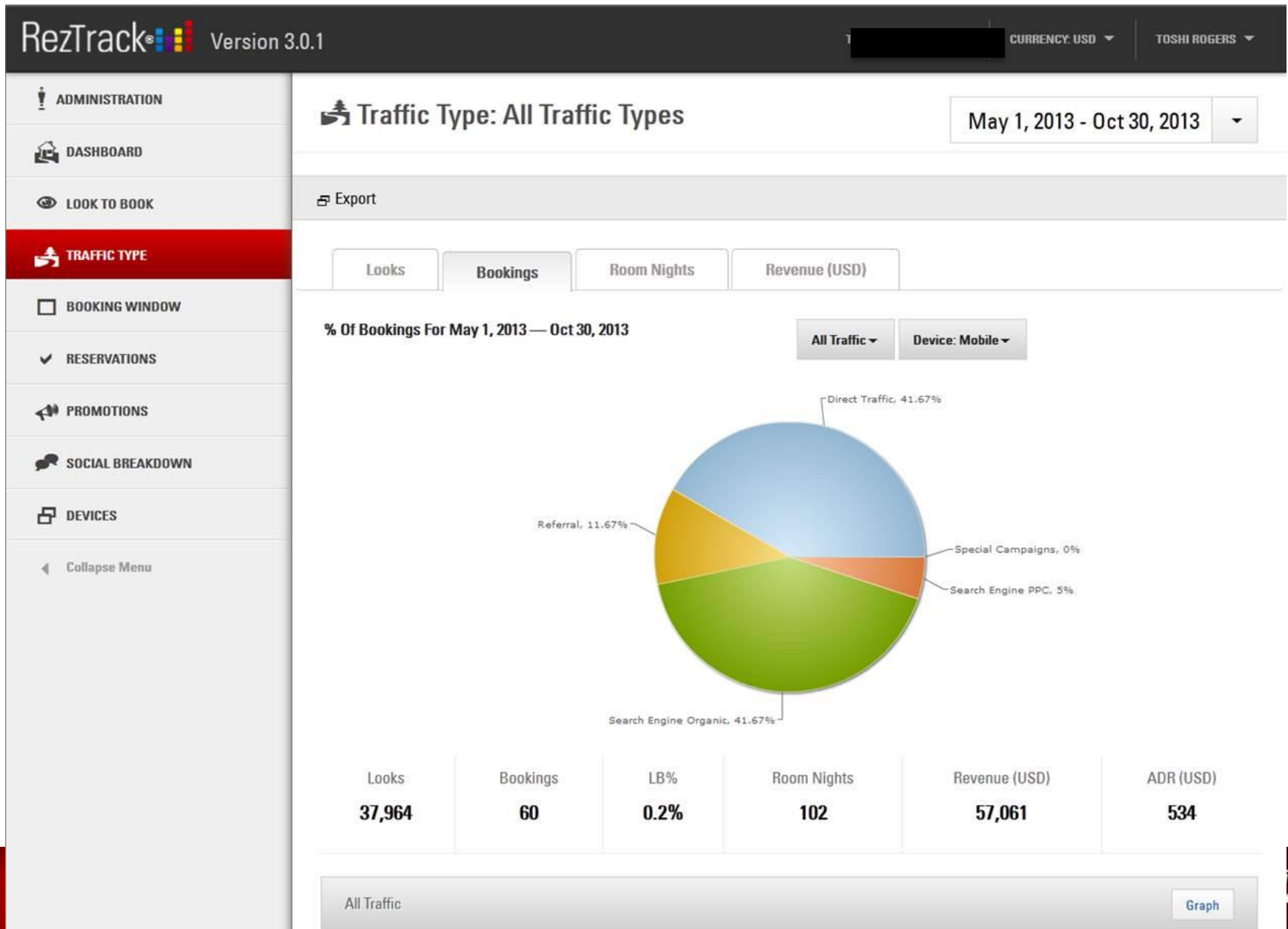
Mobile accounting for 30% of hotel website visitors



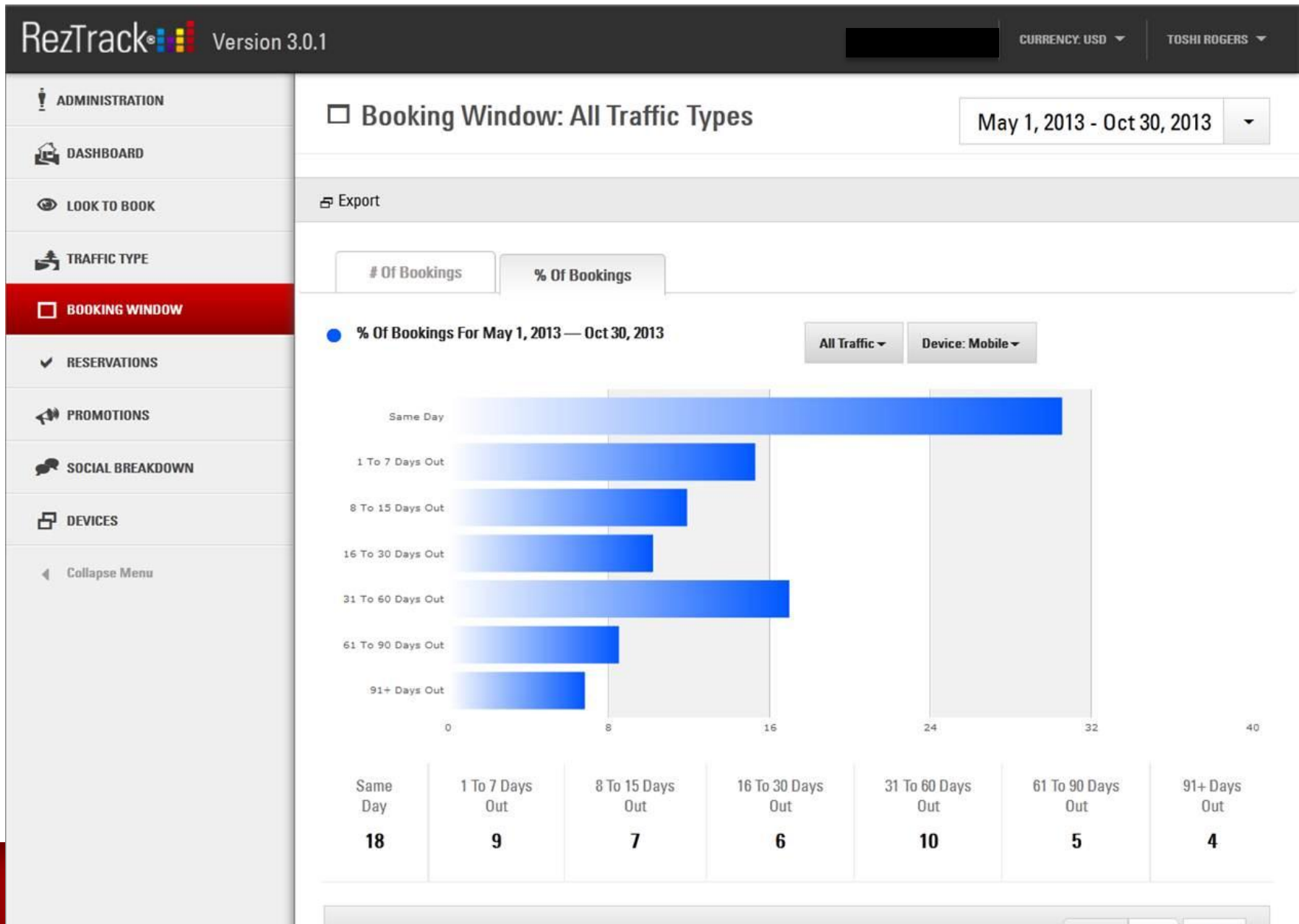
How about conversion ratios?



Easy to track mobile activity and establish benchmarks

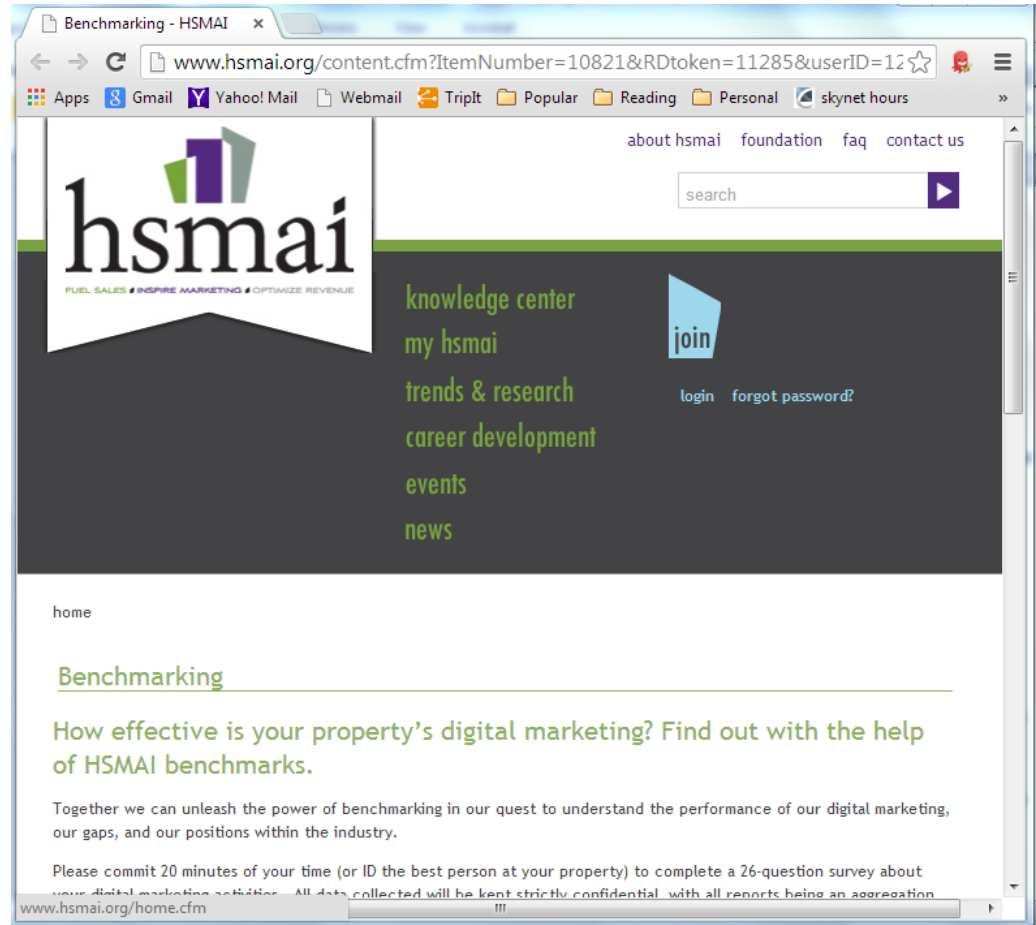


Easy to track mobile activity and establish benchmarks



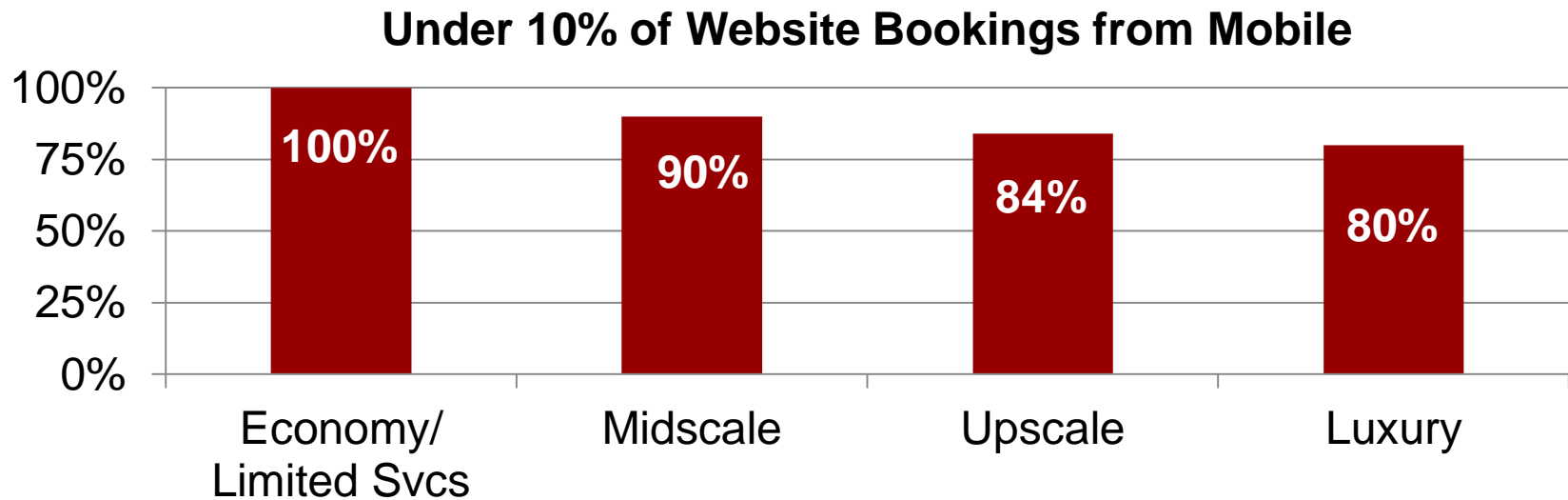
HSMAI Digital Marketing Benchmark Study

- Launched in October 2013 based on 26 benchmarking questions
- Provide insight into how you compare to similar hotels by:
 - Location
 - Size
 - ADR
 - Marketing Spend
 - Organizational Structure



Providing some interesting insights

- What is your Segment?
- What % of your Website Bookings come from mobile?



SO RECOGNIZE THIS CHANGE AND Embrace IT!



In Summary

- Traveler behavior is changing rapidly, driven by connectivity, social & mobile
- Think about mobility and mobile as a platform not just a channel
- Benchmark and measure





Questions?

Thank you
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