TRAINS, PLANES, AND AUTOMOBILES... AND HOTELS

FORESEE MOBILE SATISFACTION INDEX TRAVEL EDITION (2013)

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The Internet changed travel planning forever. Now mobile technology is making that process even more convenient for consumers, allowing them to research and book whenever and wherever they like. But are they satisfied with the experience?

### Mobile IS Growing . . .
Delivering a quality mobile experience matters now more than ever in the travel industry:


By 2016, the number of mobile users researching and booking travel on their devices is expected to rise dramatically:  2

### . . . and SO Are Consumer Expectations
Today's consumers expect a seamless, merged experience where they can shift easily between devices and channels. Does your mobile experience address the wants and needs of your mobile customers?

### HOW WELL DO YOU KNOW YOUR MOBILE USERS?

#### WHERE ARE CONSUMERS USING MOBILE TRAVEL SITES AND APPS?
More people are accessing mobile sites and apps from home and work as opposed to on the go:

- **71%** At Home
- **12%** At Work
- **13%** On the Go

#### WHO'S MORE SATISFIED? LOOKERS OR BOOKERS?
Visitors looking to purchase tickets or make reservations are more satisfied with travel sites and apps than visitors conducting research:

- **77** LOOKERS
- **79** BOOKERS

#### DO THEY PREFER SITES OR APPS?
The majority of mobile travel consumers (70%) use mobile sites, but app users report a better customer experience:

- **Airlines**: 77 with sites, 78 with apps
- **Car Rentals**: 76 with sites, 79 with apps
- **Hotels**: 78 with sites, 78 with apps
- **Online Travel Agencies**: 76 with sites, 79 with apps

### WHY MEASURE SATISFACTION?

Measuring customer satisfaction with the mobile experience is essential because satisfaction is the best indicator of future success. When done correctly, extensive research shows that a good customer experience is predictive of loyalty, recommendations, sales, and brand preference. Satisfied users of mobile travel sites and apps are:

- **62%** More likely to prefer the brand
- **73%** More likely to use the site or app as a primary resource
- **67%** More likely to recommend the site or app
- **59%** More likely to use the site or app again

Learn more about how ForeSee can help your company measure and manage the mobile customer experience at ForeSee.com

**Sources**

2. “Mobile Use Spurs Digital Travel Sales,” eMarketer, April 2012

All other data from The ForeSee Mobile Satisfaction Index, Travel Edition (2013)
EXECUTIVE SUMMARY

The ForeSee Mobile Satisfaction Index: Travel Edition provides customer satisfaction scores for the mobile experiences, including phones and tablets, offered by 25 of the largest (by revenue) U.S. mobile travel-related sites and apps in the following five categories:

- **Airlines**: Southwest, American, Delta, United, and US Airways
- **Car Rental**: Avis, Enterprise, Budget, Hertz, and Dollar
- **Online Travel Agencies (OTA)**: Kayak, Travelocity, Expedia, Priceline, Hotels.com, and Orbitz
- **Train**: Amtrak is the lone train operator measured in this study

Critical findings emerging from the research include:

> **Overall**: Southwest Airlines soars above all companies in this study with a score of 82 on the study’s 100-point scale, well above both average mobile satisfaction for airlines (77) and average mobile satisfaction for all travel companies measured in this study (77). See page 7 for a list of individual scores for the top 25 travel and hospitality companies offering mobile services.

> **Hotels Rise Above**: On average, hotels provide a better mobile experience than other travel categories, scoring a 78, while OTAs score the lowest with a 76. Hotels record the highest satisfaction for mobile users who come to book (81). See pages 13-14 for category break down and further explanation.
> **Bookers Better Lookers:** Bookers (visitors looking to purchase tickets or make reservations) have higher satisfaction (79) than lookers (visitors researching travel and investigating options) who score a 77. Learn why this is an important finding on pages 18-19.

> **App vs. Mobile Sites:** While fewer customers use mobile apps, they are generally more satisfied (78) with their mobile travel experience than those who use a mobile site (77). App users have exhibited a minor loyalty behavior simply by downloading the app. Find out on page 19 why their satisfaction is not much higher.

> **The Stars Don’t Align:** We now know that app store star ratings do not tell much. The feedback provided by tracking how many stars an app gets in an app store is questionable at best and provides no direction or insight as to how a company might improve the customer’s experience. Read more and see table on pages 21-22.

> **Location, Location, Location:** In mobile travel, the reality of where customers are when they are using mobile cannot be ignored. More than 70% of mobile users are booking from the comfort of their own homes. Only about 12% of app and site users combined say they are on the go when they are booking. Read more on page 18.

**INTRODUCTION:**
**IN TRAVEL, SATISFACTION MATTERS MORE IN MOBILE**

Delivering a quality mobile experience matters now more than it ever has before to the travel industry.

There was a time when many consumers used travel agencies to research, plan, and purchase their travel. A travel agent at a computer terminal sorted through airline travel databases, called hotels, and reserved cars, all in the name of convenience and for a nominal fee. As with so many different industries, the Internet changed travel planning forever. Now mobile technology, like smartphones and tablets, is making that process even more convenient by freeing consumers to do their travel planning whenever and wherever they like. Consumers use their mobile devices for everything, and they are rarely without one.
All measured travel categories – airlines, hotels, car rentals, and OTAs – have basic experiential elements on the web that customers have come to expect. The congruence of experiences between web and mobile matters more in travel than in any other industry right now. Travel sites have complex back-end systems, and creating satisfactory mobile customer experiences can be challenging. Add real-time inventory to the mix only raises the stakes higher. Consider this: If a retailer sells out of a shirt, it is disappointing, but it is not the same as overselling a flight or hotel room that could result in a stranded or at least an unhappy traveler.

Revenue management strategies differ among each vertical in the travel world. Yet there is one universal truth: customer expectations keep rising. In the travel industry replete with “bought loyalty” (e.g., rewards programs, elite status, frequent discounts, etc.), a company must satisfy current and prospective customers if it wants to create real and earned loyalty.

Customers do not think of companies in terms of channels (web vs. mobile vs. contact center). They want a seamless, excellent, merged experience where they can shift easily between devices and channels. Mobile can no longer be seen as a tactical play for companies that operate in channel silos. Customers are using mobile devices at home, on the go, while in airports and hotels, and while at work, and a company’s mobile sites and apps can work for them or against them.

Measuring customer satisfaction with the mobile experience is essential because satisfaction is the best indicator of future success. When done correctly, extensive research shows that a good customer experience is predictive of loyalty, recommendations, sales, and brand preference. A strong measurement can pinpoint areas of improvement to help company leaders make the best strategic, tactical, and operational business decisions.

The truth is, companies that are not measuring the mobile customer experience are operating in the dark, and the further behind they fall, the harder it will be for them to find daylight. Measuring mobile satisfaction is no longer an add-on for companies to consider. Phones and tablets are an integral nexus of online traffic and serve as companion channels to virtually every other customer touchpoint.

If a business is not satisfying its customers in the mobile channel, another business will.
THE SCORES: SOUTHWEST SOARS, US AIRWAYS LANDS AT BOTTOM

Overall satisfaction with the travel mobile experiences ForeSee measured was 77 on the study’s 100-point scale, with individual company scores ranging from 74 to 82.

Southwest Airlines soars above all with a customer experience satisfaction score of 82 while US Airways rounds out the list with a 74.

The following chart shows mobile satisfaction scores (based on ForeSee’s 100-point scale) for the 25 travel companies included in the ForeSee Mobile Satisfaction Index (Travel Edition). The scores reflect customer experiences with mobile sites and apps on phones and tablets.

Methodology

The ForeSee Mobile Satisfaction Index analyzes mobile satisfaction scores, impacts, future behaviors, and other key findings through the eyes of the consumer. This report concentrates exclusively on the 25 largest U.S. mobile travel companies (by revenue) and serves as a starting point for companies that want to benchmark their mobile performance against some of the best businesses in this category.

More than 6,000 surveys were collected from visitors to these 25 companies’ mobile apps and sites on phones and tablets from February 4-12, 2013. The study was conducted using a consumer panel. All scores are on a 100-point scale.
### Mobile Satisfaction with Top 25 Travel-Related Companies

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<tr>
<th>Category</th>
<th>Mobile Experience</th>
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SATISFACTION WITH TRAVEL COMPANIES BY CATEGORY

Consumers access travel mobile experiences from an increasingly fragmented set of devices with a growing variety of tasks to accomplish. Some are there to research, some to book, some to check in, and others to confirm reservations. Some are there at the last minute, and others simply to bide time while waiting in line or doing something else. Here are a few key observations:

> **Lookers:** When consumers want to research travel options, they are more likely to choose OTAs than travel agents, mobile sites of travel companies, or recommendations from friends and family, but they are less satisfied with OTAs than they are with other research options.

> **Bookers:** When asked how respondents prefer to book their travel, more than half selected OTAs (55%), and 43% chose direct supplier websites.

> More than half (51%) prefer to research and/or book with a laptop, compared to 18% preferring a tablet or 18% smartphone (13% chose other/no preference). Those who prefer laptops have significantly lower satisfaction than those on mobile devices (76 vs. 78, CI +/-0.8).

In addition to looking at mobile satisfaction with the travel industry as a whole or comparing it against other industries, it is important for travel companies to measure against direct competitors to see how they fare. The following charts break the companies into categories for a more similar comparison.
AIRLINES

The airline category lands an average customer satisfaction score of 77 with a fairly wide range of individual scores ranging from 74 to 82. This wider range of satisfaction illustrates the importance of measuring the customer experience even if a company is regarded as one of the best in the business. This study shows that U.S. Airways, even though it is one of the top five airlines measured, has some work to do where their mobile experience is concerned to keep up with companies such as Southwest.

In mobile, the simpler the platform, the more satisfying the mobile site tends to be for customers, as demonstrated by Southwest. At an individual company level, Southwest Airlines (82) holds a commanding five-point lead above its closest measured competitor and eight points above the lowest scoring. This could be the result of the utility and simplicity of the airline’s mobile site and app from both the usability and informational standpoints.

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There are two key groups to examine – registered users and non-registered users – which have certain, sometimes different, expectations that should be met. Across the board in airlines, or any travel sector for that matter, companies are doing a much better job of catering to registered users than they are to non-registered users. On the one hand, it is encouraging that these travel outfits are isolating this important segment of registered users and delivering experiences aligned with their needs and expectations. That said, it is possible that they could be missing out on a tremendous opportunity. Just gaining a portion of the large percentage of non-registered visitors (41%) to become registered or to try a flight with them one time will have an impact. These are two key segments that need to be looked at both separately and collectively. If both are well-served, travel companies could make a big impact on their bottom lines.
Of all industries measured, airlines have one of the highest percentages (13%, along with hotels) of visitors who use the company mobile site or app while on the go as opposed to using the mobile experience from home or work, or presumably with access to a PC or laptop. However, that means there is still a large portion of visitors (69%) engaging with the mobile experience from home while another 14% are using the mobile experience from work. This further substantiates our increasingly large set of mobile data across industries that users of mobile apps and sites are not necessarily on the go at the time of use (see App vs. Mobile Site on page 19).

More airline mobile users (33%) prefer to use an app over mobile site compared to the other travel categories; 21% saying the app was faster than the mobile site; and 14% reporting they do not like to use the mobile site if an app is available.

**NAVIGATION**

Since visitors are typically navigating mobile sites and apps with their fingers, developers should not design links and other interactive elements that are too small or densely located and risk visitors targeting the wrong link.

Instead, links should be rendered more like buttons – larger touch points for interaction, typically filling the entire width of the screen, and designated with a carat symbol, as done on this example from Southwest Airlines’ app (figure 1).

Also, when looking at Southwest’s app, the airline does not seem to play (nor need to play) by the same rules as everyone else in the airline industry, giving them a big advantage over competitors. Since they do not have traditional assigned seating and do not charge for baggage, they are able to streamline their mobile experience, alleviating much of the minor headache and confusion that goes along with some of the more traditional airline mobile sites.
NAVIGATION  (continued from page 10)

This is where the expectation from the consumer comes in. Travelers have become accustomed to looking and booking travel with a larger screen size in the web’s point-and-click environment. Mobile provides customer experience challenges that are materializing in missed consumer expectations. Compare a clean and easy to use web version of a web seating chart such as Delta’s (figure 2), Delta’s mobile view of the same chart (figure 3), and United Airline’s app version of the seating chart (figure 4). There is no screen shot for Southwest, because they don’t have a seat map.

Of course, not every airline should abandon their assigned seating arrangements to follow the Southwest model. Simply because it works for Southwest does not mean it will work for others. What is important is knowing and understanding customers and what they want, need, and expect; measuring their experiences; and using that data to improve the experience so that they will come back, recommend, and prefer a company over competitors.
CAR RENTAL COMPANIES

The average satisfaction score for car rental companies is 77 on the study’s 100-point scale with Avis and Enterprise at the top (78). The small range from 75-78 demonstrates both a concern and opportunity in this group. The concern is that there is no clear leader in this category – no one company stands out above the rest.

Company consolidation in general is a potential reason for mobile satisfaction’s tight grouping. When consolidation occurs, typically innovation is delayed until larger organizational changes settle. This separation at the top leads to a great opportunity for the company that measures the customer experience the best and can make the improvements that meet and exceed the customer’s expectations.

Car rental companies report the highest percentage of business travelers (16%) among the groups measured but record one of the lowest satisfaction scores of 74 (airlines is the lowest with a 73) among business travelers compared to hotels (77), and OTAs (77). A low satisfaction score here shows that corporate car rentals are a necessary evil and that rental companies could benefit by better catering to the needs and expectations of this class of traveler.

For car rental companies, availability tends to be greater, and so shorter booking windows from mobile devices makes sense. This study supports that. Car rental companies record the most customers making short-term bookings, within 24 hours (17%) and within 21 days (36%), when compared to the other travel categories.
HOTELS

The average score for the hotel category is 78 with a range from 76 to 80. Choice Hotels International (80) and Marriott International (79) lead the pack while Best Western International ranks eighth in the category with a 76.

As a group, hotels score higher than any other category in customer satisfaction, with five companies (Choice, Hyatt, Intercontinental, Marriott, and Wyndham) registering in the top 10 of this 25-company study. While hoteliers face the same retail issues as many of the other companies in this index, their advantage over other categories is that they have far fewer moving parts (e.g., seat choices, fluctuating inventory, delayed flights, etc.) for customers to be inconvenienced by and frustrated with. Hotels have the most predictable inventories, which leads to having the simplest parameters when creating a mobile customer experience. Leaders in this industry made an investment early on in mobile, and it seems to be paying off.

Even looking at something as simple as search functionality on a mobile device can determine if an app or mobile site is living up to its potential. If customers cannot find what they are looking for, they will not be satisfied. This could also be negative for the company if the unsatisfied customers were unable to find what they need on the mobile site or app and are forced to contact the company through a more inconvenient (for the customer) or expensive (for the business, not the customer) channel such as a contact center or walking into a hotel without a reservation.

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As an additional note, hoteliers have been training customers to book at the last minute to get the best deals. As such, their mobile experiences support this behavior and are more streamlined and targeted to bookers. Hotels record the highest satisfaction for mobile site and app users who come to book (81) compared to airline (77), car rentals (79), and OTAs (75). The hotel group also shows the highest customer satisfaction scores for short-term bookers within 21 days (78) and within 24 hours (82) compared to short-term bookers in the other categories. However, it should be noted that 44% of visitors to hotel apps and mobile sites are still coming to research over booking and are less satisfied (77). See the section Lookers and Bookers on page 18 to find out why this might not be good.

**SEARCH FUNCTIONALITY**

Some website visitors default to using Search to find the information they are looking for, and this is something that will be expected more in mobile as well. If Search is a primary goal, as a best practice it should be located prominently directly below the site logo on the homepage and every page of the site, just as Choice Hotels International has done with their app (right).

Also, all instances of mobile Search functionality should consider using Autocomplete functionality that offers suggested search terms as visitors are typing. This is a critical feature for mobile where typing is not as easy and can be more prone to errors.
The OTA category (76) lags the other groups in this study as customers report being less satisfied with these companies’ mobile experiences. Four of the top six in this category score below the overall travel aggregate (77). Kayak and Travelocity lead the group with a customer satisfaction score of 78. Orbitz and Hotels.com trail with a 75. With a small range of scores (75 to 78), much like the car rental category, no clear winner emerges, leaving an opening to those companies willing to focus on improving the customer experience.

These lower scores and rankings could be partly due to the overwhelming amount of information on hand and tasks available to do on these companies’ mobile sites and apps where available. When it comes to the mobile experience, there is a definite need for focus. Simpler is better. With mobile, it is about delivering a customer experience that is singular for the task at hand.

OTAs have the highest percent of lookers (53%) compared to other categories in this study, and they are more satisfied (77) than the 18% of OTA bookers (75) (read the section Lookers vs. Bookers on page 18 for further explanation on these two groups of mobile travel sites visitors). OTA bookers have the lowest satisfaction score when compared to bookers in other categories, showing OTAs have some work to do in this area.
OTAs also have the highest proportion (84%) of leisure travelers visiting their mobile sites and apps compared to airlines (76%), car rentals (69%), and hotels (73%). Yet these visitors score the same as their 8% of business travelers and the 6% that are both (leisure and business), showing they are not doing anything different with their mobile experience to cater to the needs and wants of the largest group using their mobile sites and apps. This is a huge finding of the study for OTAs: by not catering to this largest segment of their audience, they are penalized for their generic experience (by serving the aggregate audience and not the pervasive leisure segment); they do not specifically benefit from serving any segment at all.

Another interesting point in this category to watch is how the acquisition of Kayak by Priceline in the fourth quarter of 2012 will develop. Will Kayak’s superior mobile experience, as demonstrated in this study, help pull up Priceline’s lesser mobile score, or will Priceline pull down Kayak? It will be tricky as both companies will reportedly operate as separate entities and have different clientele. However, if the customer experience is measured correctly, the two companies could learn from each other as far as what to do and what not to do to be successful and live in a symbiotic relationship.

While examining aggregate and category scores is a great way for companies to look at their direct competitors, each company has unique customers with varying degrees of wants, needs, and expectations to meet. To make improvements and move their company forward, company leaders need to listen to and meet the expectations of their customers – not someone else’s. That starts with a comprehensive measuring system that is accurate, reliable, credible, and offers predictive qualities that turn data into usable information that allows leaders to make better decisions at strategic, tactical, and operational levels.
FULL VS. REDUCED CONTENT

An important question for industry leaders to ask is “How much content should you have on your mobile site?” A few years ago, mostly due to bandwidth and technical limitations, the answer was “minimal” – a few critical news or content bits and key functionality such as locators or calculators. However, it is becoming more and more evident that people prefer to browse the web on their phone and are doing so more often while at home. With this being the case, visitors do not want nor should they receive an over-simplified experience. This does not mean the entire full website should be ported over to a mobile-sized screen—it should be a judicious and thoughtful balance between too little and too much content much like Kayak’s mobile site (figure 1).

Kayak’s mobile site has a simple layout and contains the main points of searching for a flight contained on one page compared to Orbitz’ mobile site (figure 2) which requires the user to scroll down about three pages’ worth of information in order to search/book a flight. Orbitz’ app (figure 3) is much more succinct and user friendly, though (see App vs. Mobile Site section on page 19 as to why this may be an important distinction).

Taking a “mobile first” perspective on choosing this content will enable the mobile site to be sufficiently content-rich while still remaining consistent with the desktop site.
HOW “MOBILE” IS MOBILE?

This study shows that more people are accessing mobile sites and apps from home (71%) and from work (13%) as opposed to on the go (12%). Those accessing from home also report being more satisfied (78) than the other two groups of users (76). The question to consider is: are mobile users really mobile? The number of people using mobile on the go and their satisfaction with those experiences should increase as mobile use itself continues to grow, the experiences improve, and customers become more comfortable using their mobile devices to make transactions.

To improve the mobile experiences and keep up with changing technology and the number of people using it, they must measure, and measure continuously, so that they can gauge customer expectations and make the necessary changes to meet and surpass them.

Both the airlines and hotels category have the highest percent of visitors using their mobile services (mobile site or app) on the go (13%) with a satisfaction score of 76.

When looking at the app versus mobile site, app users (15%) are more likely to be on the go and are significantly more satisfied doing so (78) than the 10% of on-the-go mobile site users (75). This makes sense as apps are generally more succinct and easier to use on the go than their mobile site counterparts.

INTENT: LOOKERS VS. BOOKERS

The convenience of the Internet allows people to be deliberate or impulsive. They can plan in advance or at the last minute, or they can search until they find the deal they want. This study shows that more people are accessing travel company mobile sites and apps to research (43%) and are less satisfied (77) than the 23% that book (79) via mobile.
Many mobile experiences are designed to help consumers execute a purchase and book a reservation. However, almost half of a company's visitors use the mobile site or app to conduct planning research. Useful functionality might include the ability to save previous searches and itineraries or the ability to schedule an email or text to the user later with a bookmark to where they left off in the process. An integrated experience would go beyond optimizing for the in-channel mobile experience and include a seamless transition across channels (i.e. via a contact center or on the Web). There is opportunity to satisfy these visitors and turn them into loyal, long-term customers who will return, purchase again, and recommend the companies that meet their needs. Later in this report we will discuss top priorities for travel mobile sites, with site information being the top priority affecting almost three-quarters of measured sites.

In general, Marriott scores the highest in satisfaction for bookers (84) and Southwest the highest for researchers (82). OTAs, as a group, had the highest percentage of researchers (53%), while the car rental group had the lowest (33%).

**APP VS. MOBILE SITE**

Unlike mobile websites, which are either full websites on a smaller screen or websites tailored to mobile devices, apps have the advantage of being created for specific operating systems and devices. This advantage is evident in the scores below that compare satisfaction between apps and mobile sites and reveal that customers find financial services apps to be more satisfying than mobile sites.

Among users who responded, 70% were mobile site users and 30% were app users. App users (78) scored slightly higher than mobile site users (77). Although app users did outperform mobile site users, they did not do so by much which indicates that there is an opportunity to improve upon the app experience and that customer satisfaction with apps is not as great as presumed. App users choose the app for several reasons. According to the study, 36% of respondents reported apps were easier to use than mobile sites, and 23% said apps were faster. One-fifth (20%) said they did not like to use mobile sites if an app was available.
The research shows visitors did not use the company’s app for several reasons: 51% of people had not downloaded the app, 22% did not know the company had an app, and 18% said they did not like to use apps.

App users score higher than mobile site users when measuring impacts and future behaviors (please see page 21 for more on impacts and likelihood scores). They score two points higher when measuring the app’s functionality and are 6% more likely to prefer the brand overall, 4% more likely to use the mobile channel as a primary resource and use it again in the future, and 3% more likely to recommend to family and friends.

The airline category has the most app users (33%) with a satisfaction score of 79, while OTA’s have the most mobile site users (72%) with a satisfaction score of 76. Hotels are split 70/30 between mobile sites and apps respectively and maintain a satisfaction score of 78 for both experiences.

At an individual company level, Delta has the highest percentage of app users (39%), while Southwest has the highest satisfaction score for app users (83).

Providing a solid app experience for customers both new and loyal deepens a company’s relationship with them. When a travel company can provide a customized, superior app experience, it can engage customers further, embed them deeper into the brand experience, and make them more loyal as the result of higher satisfaction. However, travel-related companies must not forget prospective customers in the mobile equation, and their mobile sites should appeal to and serve the needs of both current customers and potential prospects.
WHY SATISFACTION MATTERS

Satisfaction matters because it determines what consumers will do next. Simply put, satisfied customers buy more and buy more often; recommend companies to family, friends, and colleagues; and have greater loyalty – all key factors in growing a business.

For this report we put ForeSee’s predictive customer experience analytics to work and compared less satisfied visitors (with mobile satisfaction scores of 69 or less) to highly satisfied website visitors (with satisfaction scores of 80 or higher) to see how much more likely satisfied customers are to take part in crucial future behaviors such as loyalty, recommend, and use the mobile channel as a primary resource.

Based on these likelihood scores, satisfied mobile travelers say they are 62% more likely to prefer the brand when compared to dissatisfied shoppers. They are also 73% more likely to use the mobile channel as a primary resource, 67% more likely to give positive recommendations, and 59% more likely to use the mobile channel again.

<table>
<thead>
<tr>
<th>Likely Future Behavior</th>
<th>Average Scores, Respondents Scoring Mobile Satisfaction 80+ (Highly Satisfied)</th>
<th>Average Scores, Respondents Scoring Mobile Satisfaction 69 or lower (Dissatisfied)</th>
<th>% difference between Highly Satisfied &amp; Dissatisfied</th>
</tr>
</thead>
<tbody>
<tr>
<td>Brand Preference</td>
<td>86</td>
<td>53</td>
<td>62%</td>
</tr>
<tr>
<td>Primary Resource</td>
<td>83</td>
<td>48</td>
<td>73%</td>
</tr>
<tr>
<td>Recommend</td>
<td>90</td>
<td>54</td>
<td>67%</td>
</tr>
<tr>
<td>Use Again</td>
<td>92</td>
<td>58</td>
<td>59%</td>
</tr>
</tbody>
</table>
These calculations show that satisfaction should be a key performance indicator for any travel-related company making an investment in mobile. After all, the other ways that executives currently use to track mobile success lack any predictive or actionable qualities. App store ratings do not reveal much information. Furthermore, that feedback is more useful for customers than it is for companies, and it provides no direction or insight as to how a company might improve the customer experience. The feedback provided by tracking how many stars an app gets in an app store is questionable at best – usually only the most satisfied and the least satisfied provide feedback, leaving the silent majority unrepresented. The following chart demonstrates how misleading stars and download counts can be when it comes to truly understanding the mobile customer experience.

**APP STORE RATING VS. SATISFACTION**

ForeSee knows that customer satisfaction more valid than Google ratings or Apple ratings because the methodology it uses to measure satisfaction in these studies as well as for our clients has 20 years of academic research behind it, linking it to critical future behaviors and financial success. Moreover, the way ForeSee measures and calculates satisfaction provides important insights into how to improve the experience that simple ratings do not.
FACTORS AFFECTING MOBILE CUSTOMER SATISFACTION

Clearly mobile satisfaction is critical to the future success of a travel business. Leaders in this industry need to increase mobile satisfaction so that travelers and would-be travelers are even more likely to prefer the brand overall, use the mobile channel as a primary resource, recommend the company, and return to the mobile site.

The ForeSee method scientifically measures several key drivers, or elements, of mobile satisfaction. The ForeSee model results tell us how users feel about these performance areas and how much influence each element has on their overall satisfaction. Improving the high-impact elements in the eyes of visitors leads to quantifiable increases in satisfaction. The elements that have the most impact on overall customer satisfaction, and therefore on future behaviors, both online and offline, differ for specific retailers.

This study measured four general elements of a retail mobile experience: site information, functionality, and site and app performances. For the purposes of this study, these elements are measured in a wide range because ForeSee used a panel to measure visitors who had their mobile experience up to a few days or weeks before the measure was taken. (ForeSee is able to determine the impact of a wider range of more detailed elements for our clients because visitors are surveyed immediately after a mobile experience.)

ForeSee technology quantifies which elements have the greatest impact on overall satisfaction, which may or may not be the lower-scoring elements. Companies are likely to improve satisfaction the most by focusing improvements on the elements that have the greatest impact on satisfaction, rather than focusing on scores alone.
## Elements of Mobile Satisfaction

<table>
<thead>
<tr>
<th>Element</th>
<th>What It Measures</th>
<th>Websites that Should Prioritize the Element</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Information</td>
<td>The thoroughness of information and how well the information on the mobile site provides answers to user questions</td>
<td>Among the elements measured in this research, site information is a top priority element for 18 (72%) companies: Southwest Airlines, US Airways, Avis, Budget, Dollar, Enterprise, Hertz, Best Western International, Choice Hotels International, Hilton Worldwide, Hyatt, Marriott International, Starwood Hotels &amp; Resorts International, Wyndham Hotels &amp; Resorts, Hotels.com, Priceline, Travelocity, and Amtrak.</td>
</tr>
<tr>
<td>Site/App Functionality</td>
<td>The usefulness, convenience, and variety of features available to mobile site visitors</td>
<td>Among the elements measured in this research, website functionality is a top priority for improvement for five (20%) companies: Delta Airlines, Intercontinental Hotels and Resorts, Expedia, Kayak, and Orbitz.</td>
</tr>
<tr>
<td>Site/App Performance</td>
<td>How quickly the pages load and the ability to load pages without getting error messages</td>
<td>Among the elements measured in this research, content is a top priority for two (11%) companies: American Airlines and United Airlines.</td>
</tr>
</tbody>
</table>

Almost three-quarters (72%) of the measured mobile experiences should be prioritizing improvements to site information: the thoroughness of information and how well the information on the mobile site provides answers to user questions. In other words, the fundamental tenets of good retailing exist in mobile like they do in other channels.

Just as companies vary from one to another, so too should the elements of a touch point experience.

Consumer expectations can affect satisfaction, and by understanding the impact of specific aspects of a mobile experience on their audience’s satisfaction, retailers can focus their efforts on the changes that are likely to matter most and save on costly investments in upgrades that are unlikely to result in desired future behaviors.
CONCLUSION

Mobile is not only moving at lightning speed; right now it is changing at lightning speed, and drastically changing the way today's multichannel, multi-device consumers are engaging with companies. Business leaders should not stand idle and watch the opportunity fly by. If they measure mobile (and measure it the right way), they can steer effortlessly through turbulent skies and soar in clear ones. The choice is up to them, though.

ABOUT FORESEE

As a pioneer in customer experience analytics, ForeSee continuously measures satisfaction and delivers powerful insights on where to prioritize improvements for maximum impact. ForeSee applies its trusted technology across channels and customer touch points, including websites, call centers, brick-and-mortar locations, mobile experiences, and social media interactions. Because ForeSee's proven method measures satisfaction in a manner that is predictive of customer loyalty, purchase behavior, future financial success, and even stock prices, executives and managers are able to drive future success by confidently prioritizing the efforts that they know will achieve business goals.

Working across the public and private sectors with expertise in a range of business and consumer industries, ForeSee combines the best in customer satisfaction measurement, proven predictive analytics, actionable usability analysis, and rich observational data to work with large and small organizations around the world. The results of measuring success through the customers' eyes are better outcomes for businesses and better experiences for consumers.

Visit [www.foresee.com](http://www.foresee.com) for customer experience solutions.