

criteo.

# Summer Travel Report 2018



# Takeaways



# How did we build up this report?



Every day, Criteo records 600TB of shopper data created by the 1.2B monthly active shoppers in our data pool.

On the travel side, this means that we can base our analysis on more than **three Billion bookings per year across desktop, mobile sites and applications.**

We have strict rules in terms of leveraging data: in order to protect the privacy of our clients, and for our data to reflect better the market, we only show data where we have at least 10 clients.

For more information regarding our analysis methodology, please refer to the end of this presentation.

# Criteo Travel in 8 takeaways



Europe shows the highest head & shoulders seasonality  
Southern Europe summer bookings start as early as April  
OTA continue to dominate in their ability to leverage the summer demand

Trips including children will be mostly booked around Christmas

Industry will most likely keep a high mobile share growth, boosted by summer  
Regions with lower mobile share are catching up, especially in summer

OTAs capture most of the mobile bookings  
Mobile is key to catching last minute high-yield bookings



# Seasonality

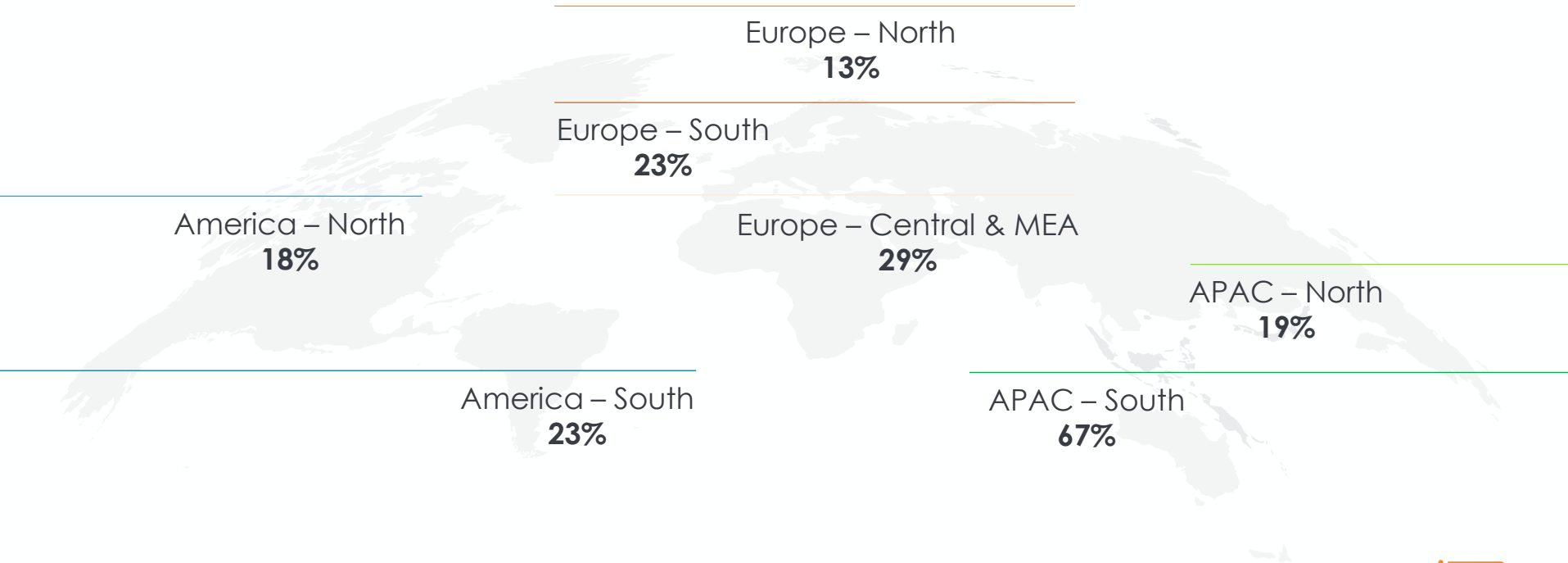


Focusing on Europe & following OTAs path

# South APAC has experienced the highest booking growth in 2017



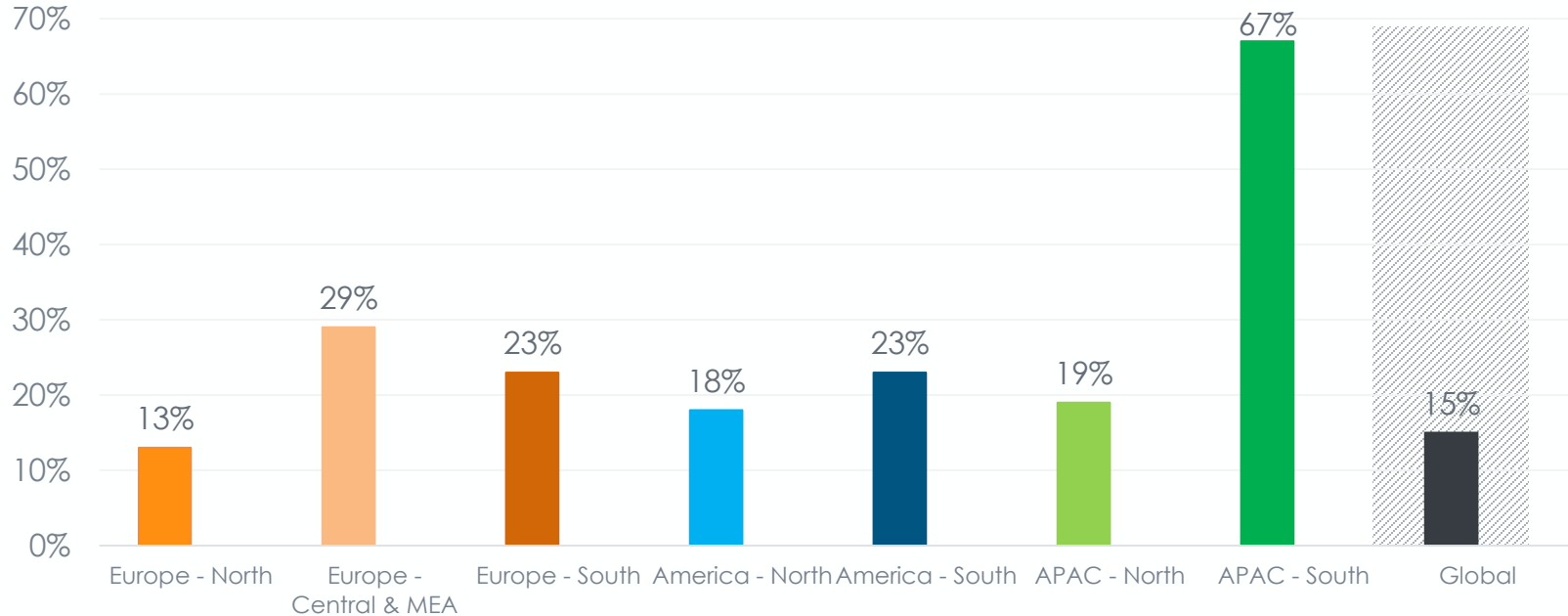
Global online booking growth, Q4 2017 vs. Q4 2016



# South APAC has experienced the highest booking growth in 2017



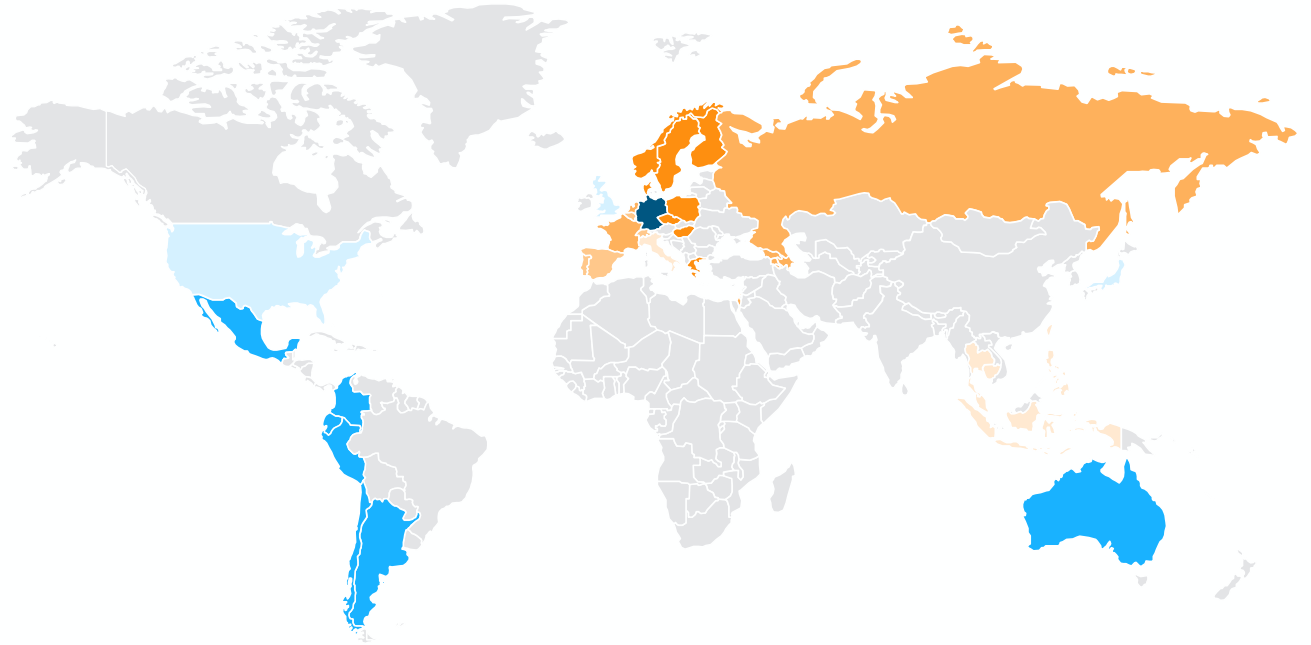
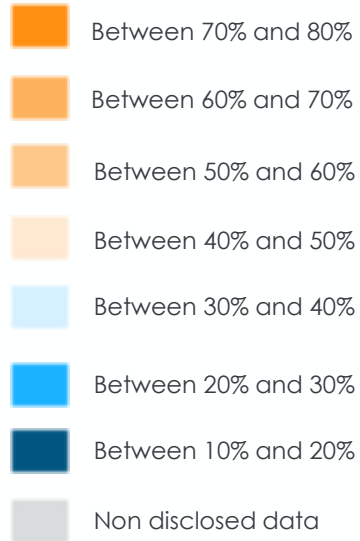
Global online booking growth, Q4 2017 vs. Q4 2016



# Germany & UK remain the outliers of the European summer trend



2017 average <June/July/August> online bookings increase, compared to Q4 2016

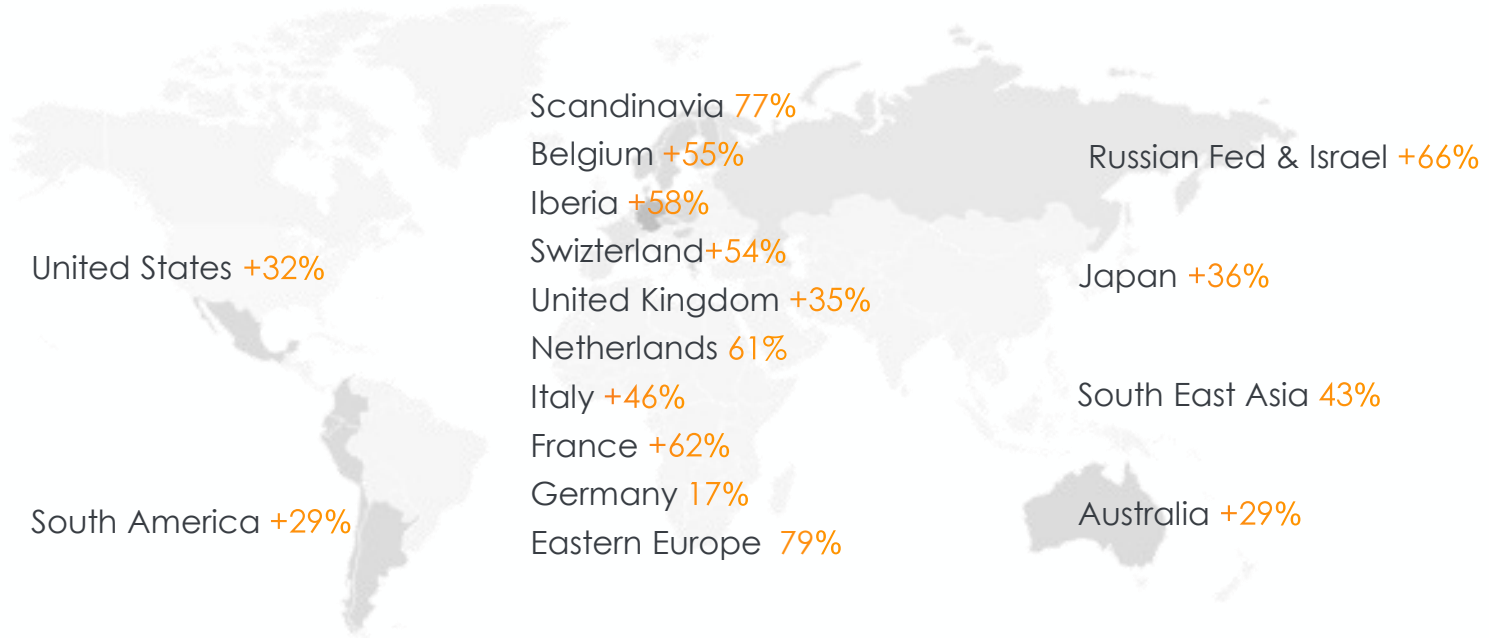




# Germany & UK remain the outliers of the European summer trend



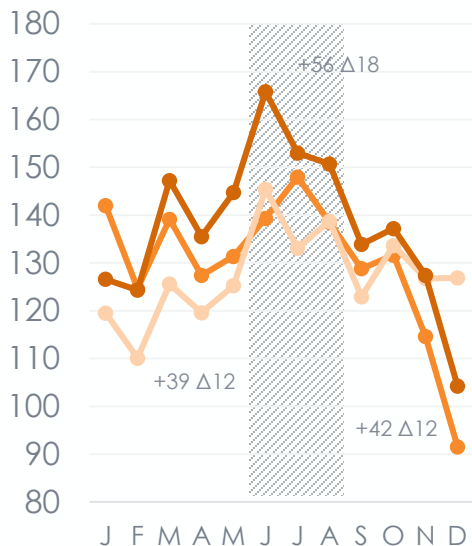
2017 average <June/July/August> online bookings increase, compared to Q4 2016



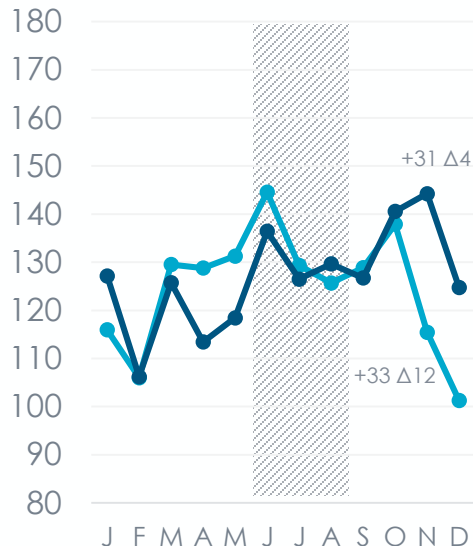
# Europe shows the highest head & shoulders seasonality



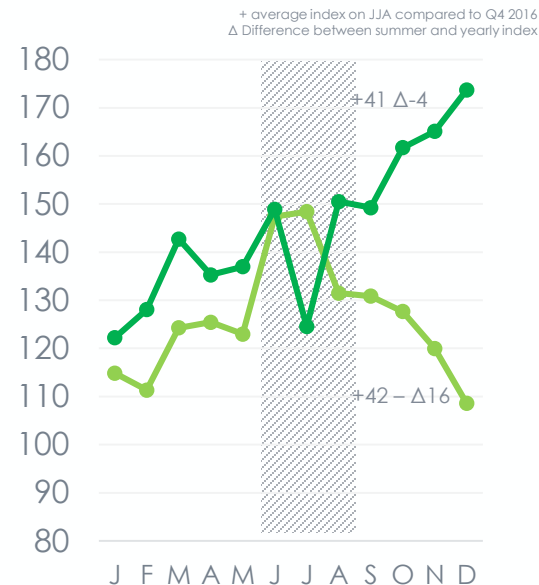
2017 monthly online bookings, indexed on Q4 2016



- Europe - North
- Europe - Central & MEA
- Europe - South



- America - North
- America - South

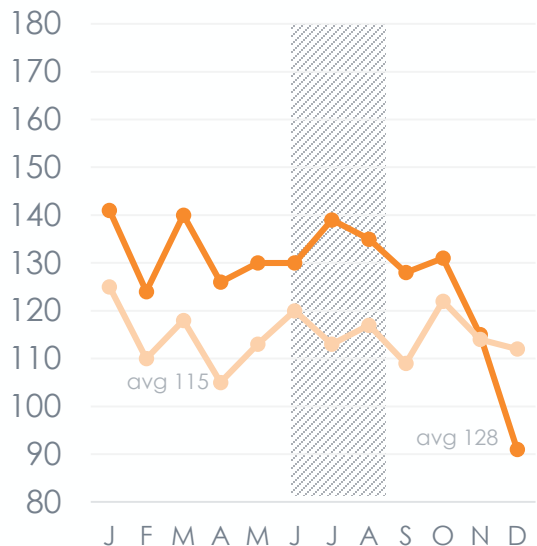


- APAC - North
- APAC - South

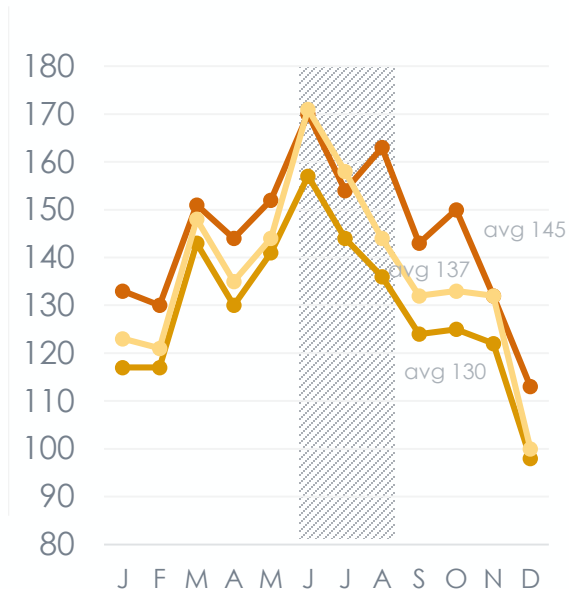
# Southern Europe summer bookings start as early as April



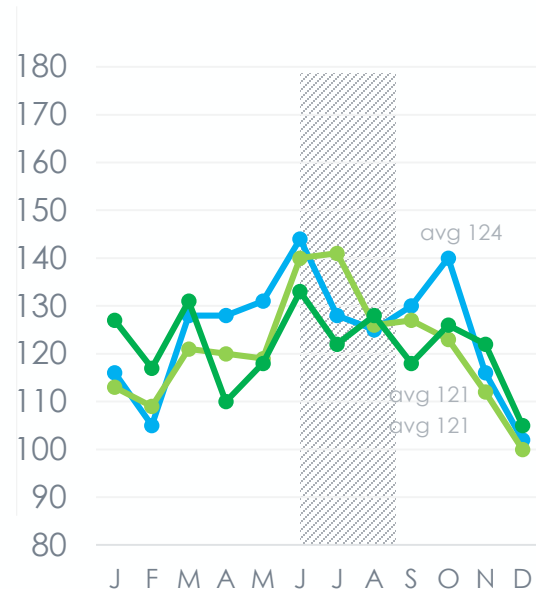
2017 monthly online bookings, indexed on Q4 2016



UK Germany



France Italy Spain

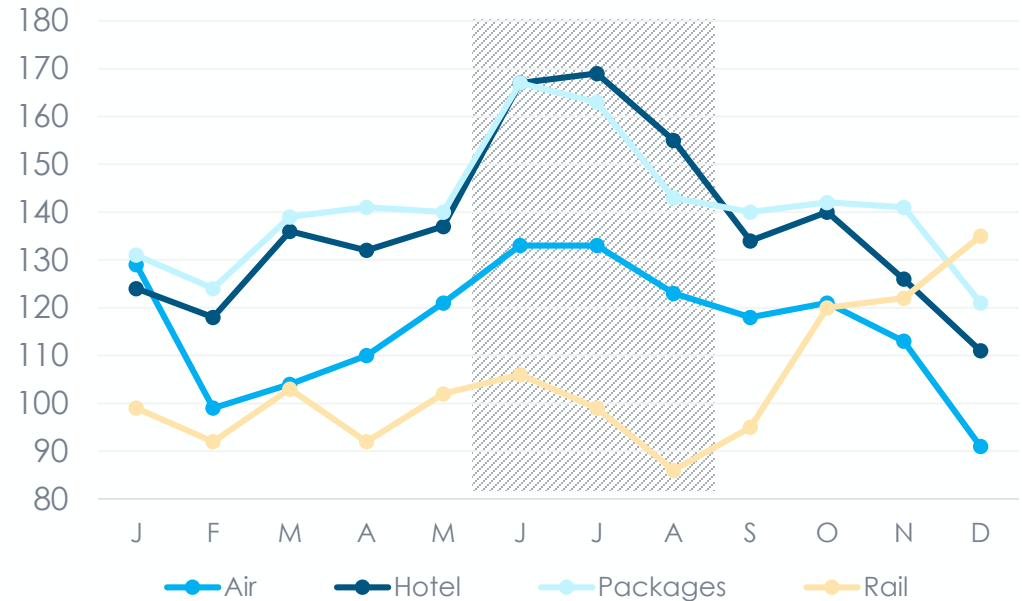
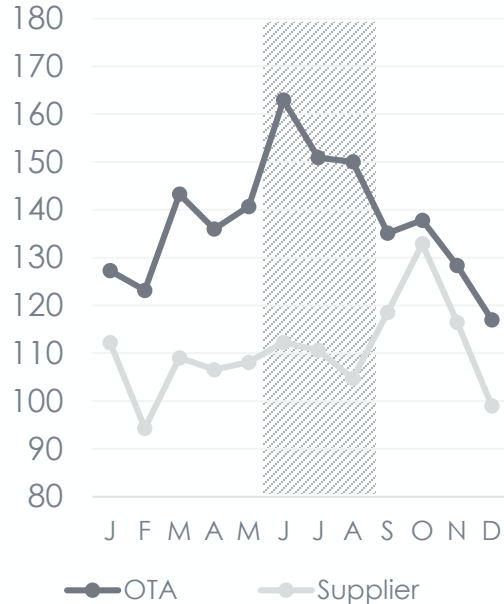


US Australia Japan

# OTA continue to dominate in their ability to leverage the summer demand



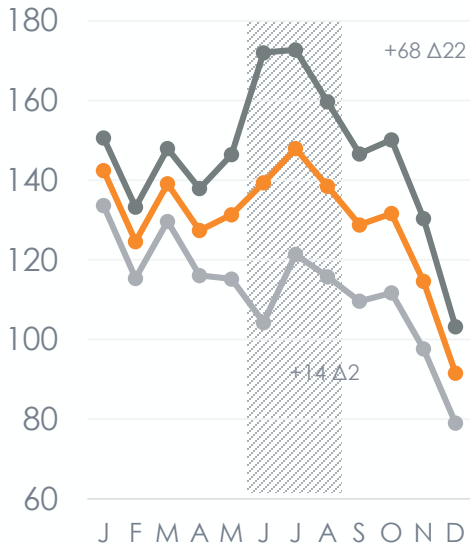
2017 monthly online bookings, OTA vs. Suppliers, and Travel sub-verticals, indexed on Q4 2016



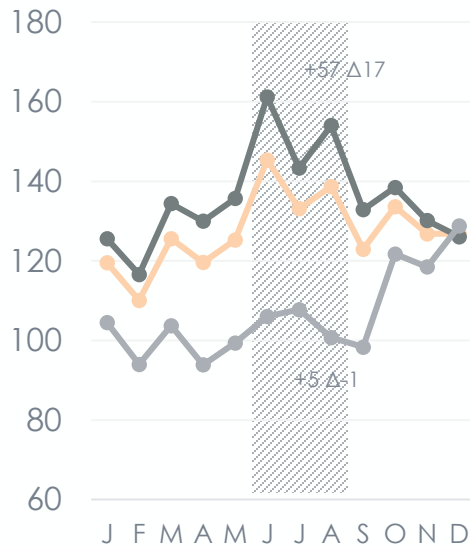
# OTA continue to dominate in their ability to leverage the summer demand



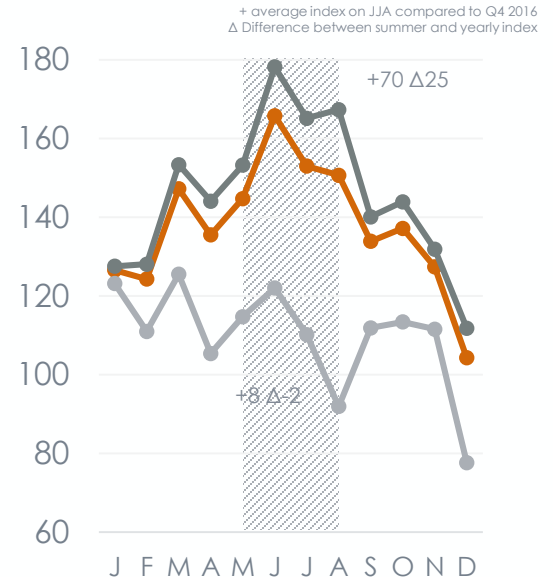
2017 monthly online bookings, indexed on Q4 2016



— Europe - North  
— OTA  
— Supplier



— Europe - Central & MEA  
— OTA  
— Supplier

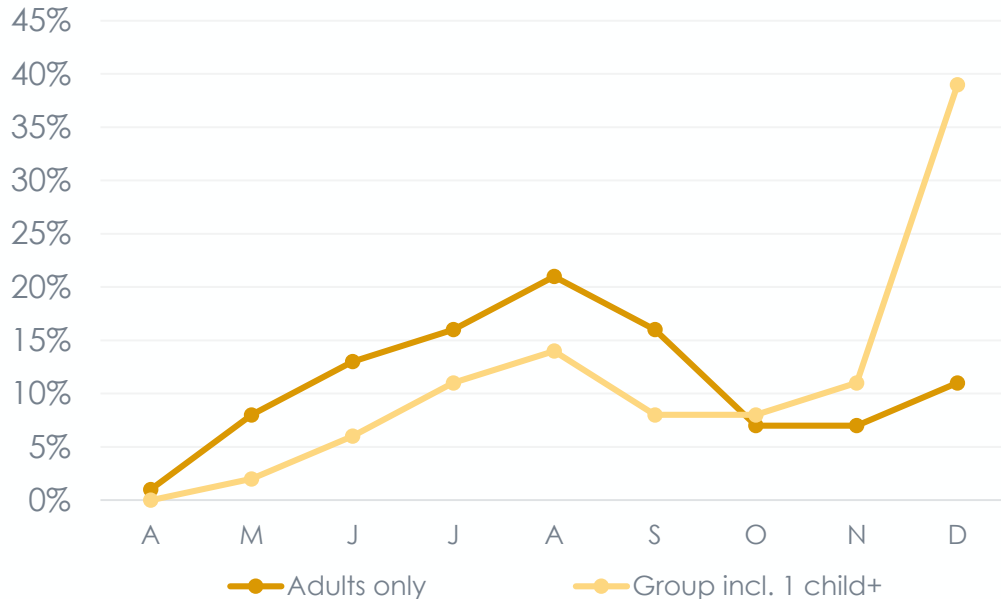


— Europe - South  
— OTA  
— Supplier

# Trips including children will be mostly booked around Christmas



*Distribution of online bookings, between March & December 2017*



- While Summer accounts for 31% of all families bookings (at least 1 child) on the last 3Qs, december is still the busiest month of the year with almost 40% of bookings
- On the other hand, people without children book most of their flights during the Summer Season, due to flexibility of travel arrangements & less sensitivity to price and location

A close-up photograph of a person's hands holding a smartphone over a passport. The phone's screen displays a QR code and flight information, including 'YUL' and 'ADON6'. The passport is dark blue with 'PASSPORT' visible. The background is blurred, showing a red bag and a yellow bag.

# Mobile: The Summer Hit

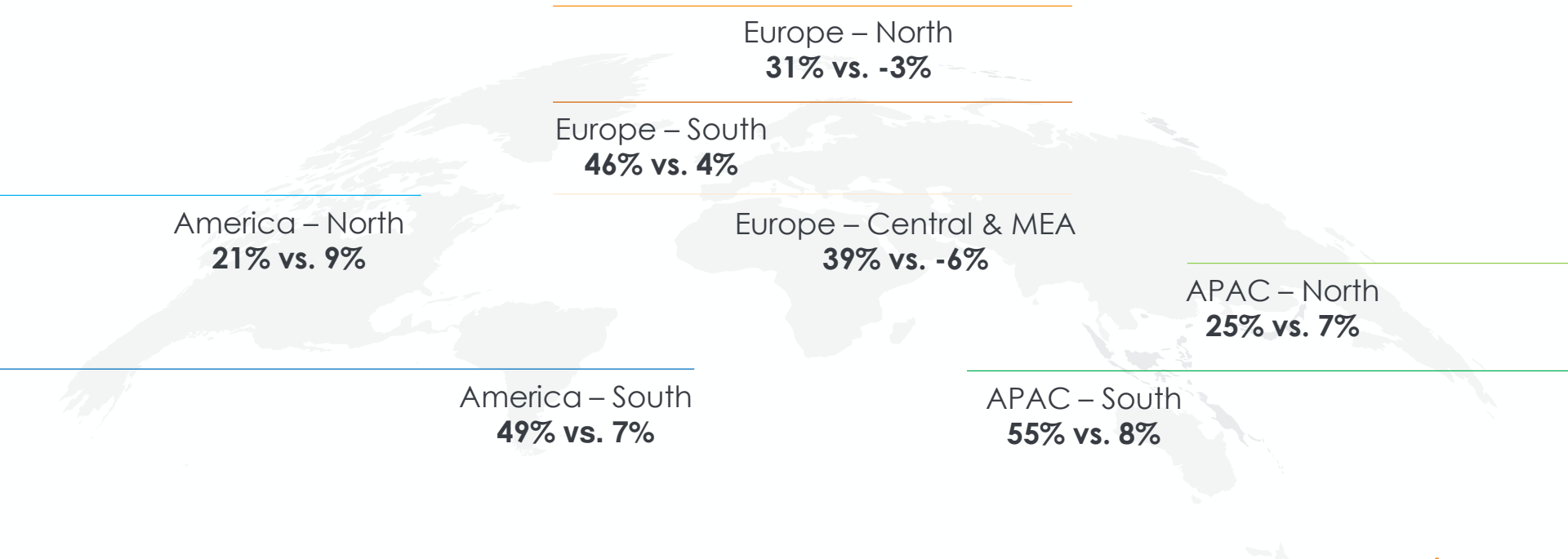


The share of mobile is expecting to keep growing, capturing last-minute high-yield bookings

# Mobile share continues to grow 3 to 10 times faster than that of desktop



Mobile bookings growth vs. desktop bookings growth, Q4 2017 compared to Q4 2016

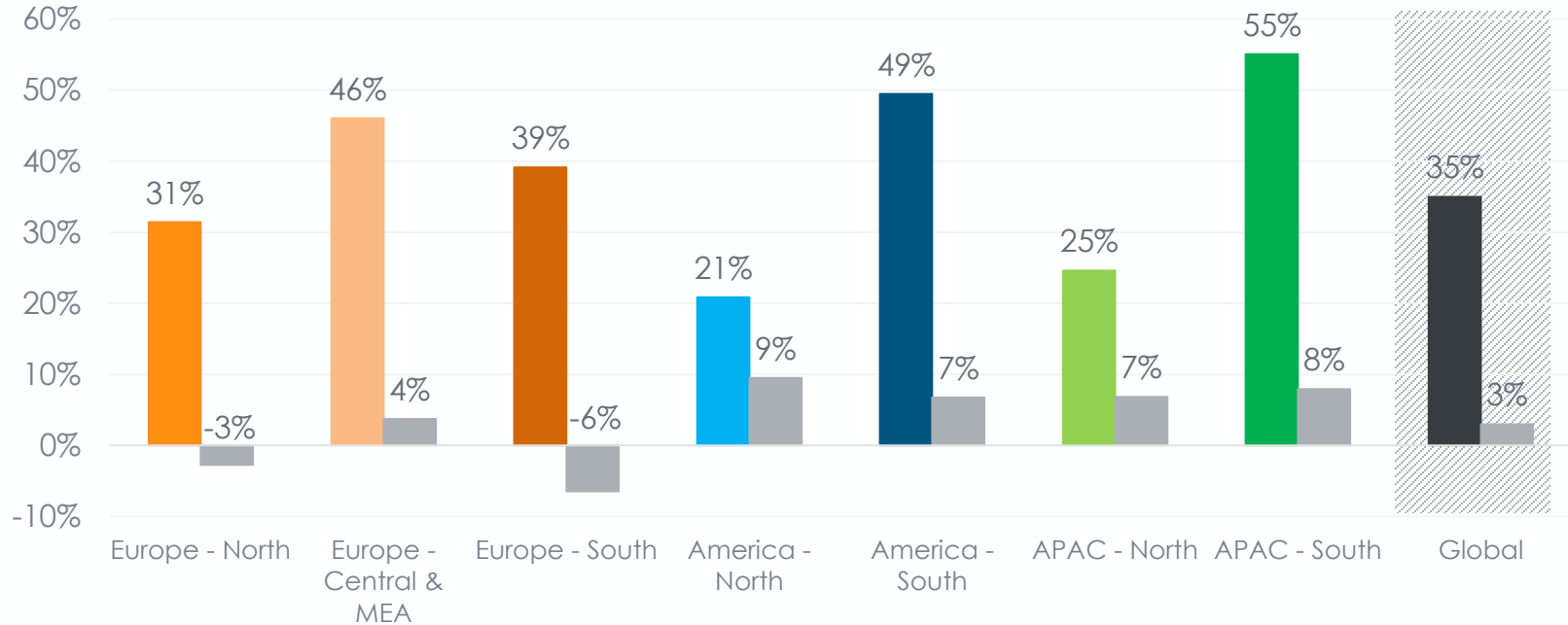




# Mobile share continues to grow 3 to 10 times faster than that of desktop



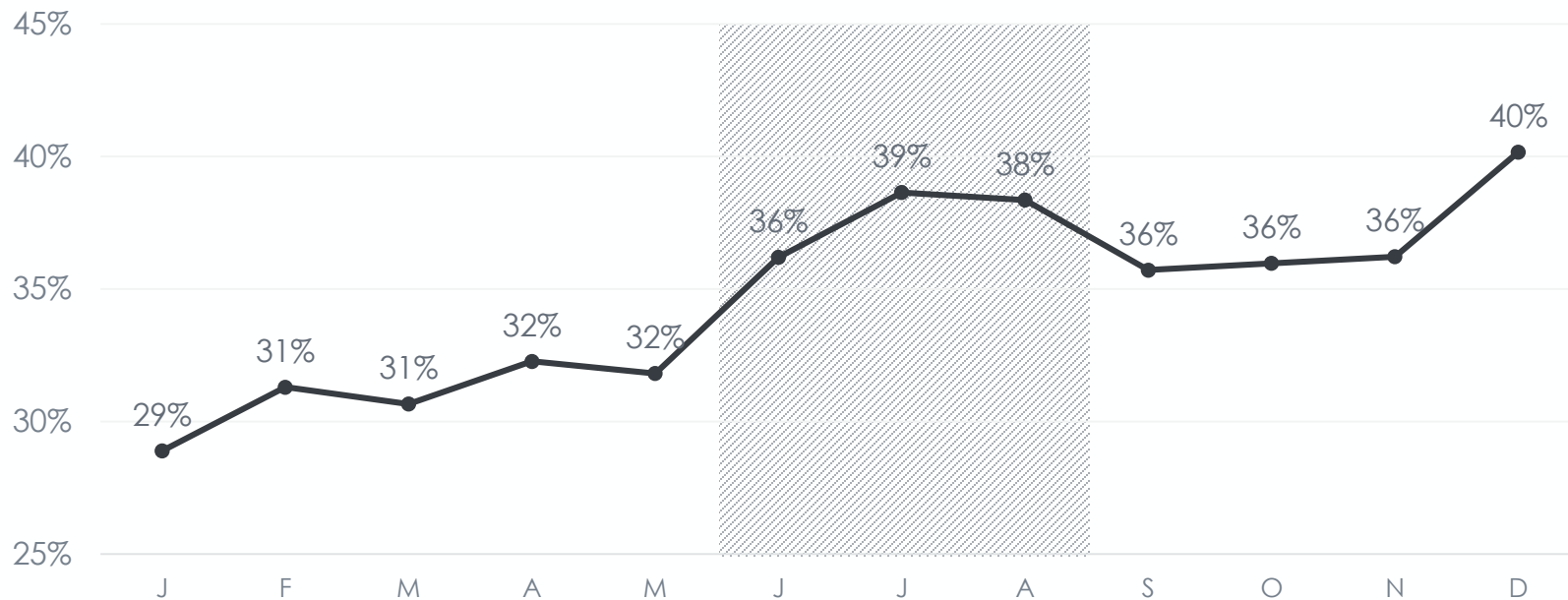
Mobile bookings growth vs. desktop bookings growth, Q4 2017 compared to Q4 2016



# Industry will most likely keep this high mobile share growth, boosted by summer



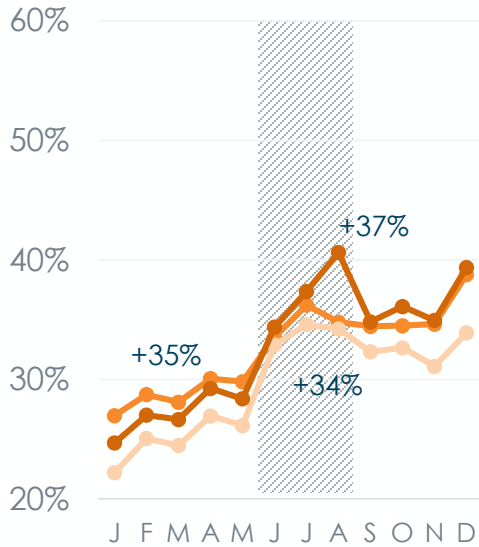
2017 monthly mobile share of bookings, worldwide



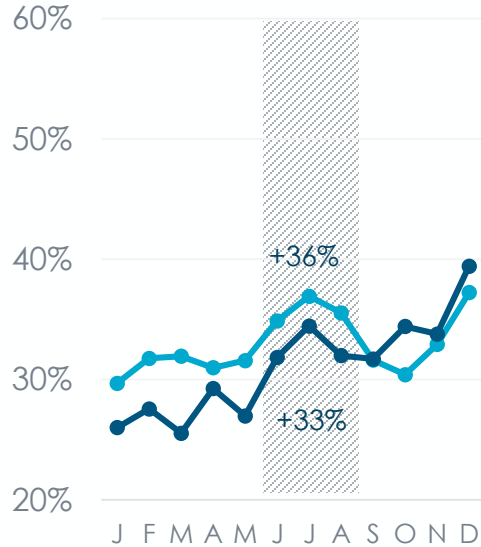
# Regions with lower mobile share are catching up, especially in summer



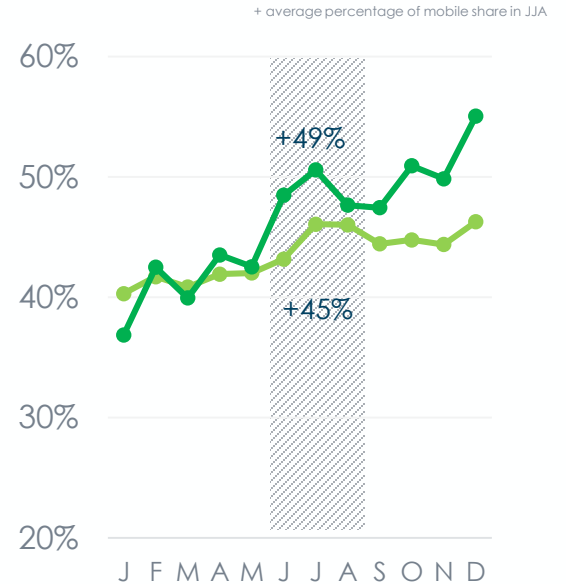
2017 monthly mobile share of bookings, per region



- Europe - North
- Europe - Central & MEA
- Europe - South



- America - North
- America - South

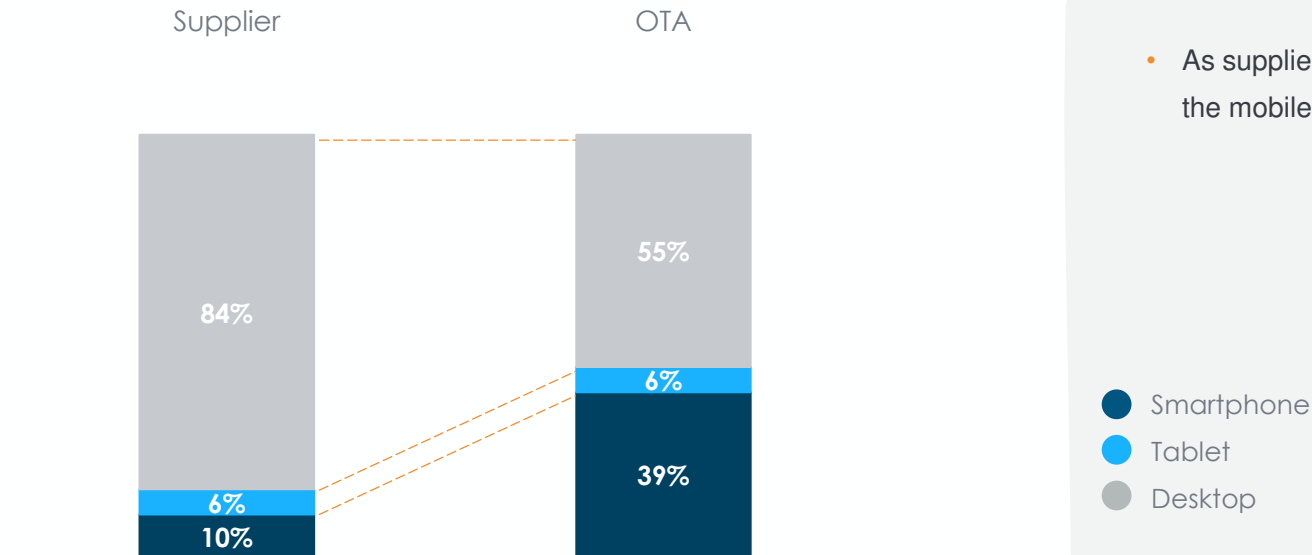


- APAC - North
- APAC - South

# OTAs capture most of the mobile bookings



Q4 2017 booking breakdown per device, worldwide



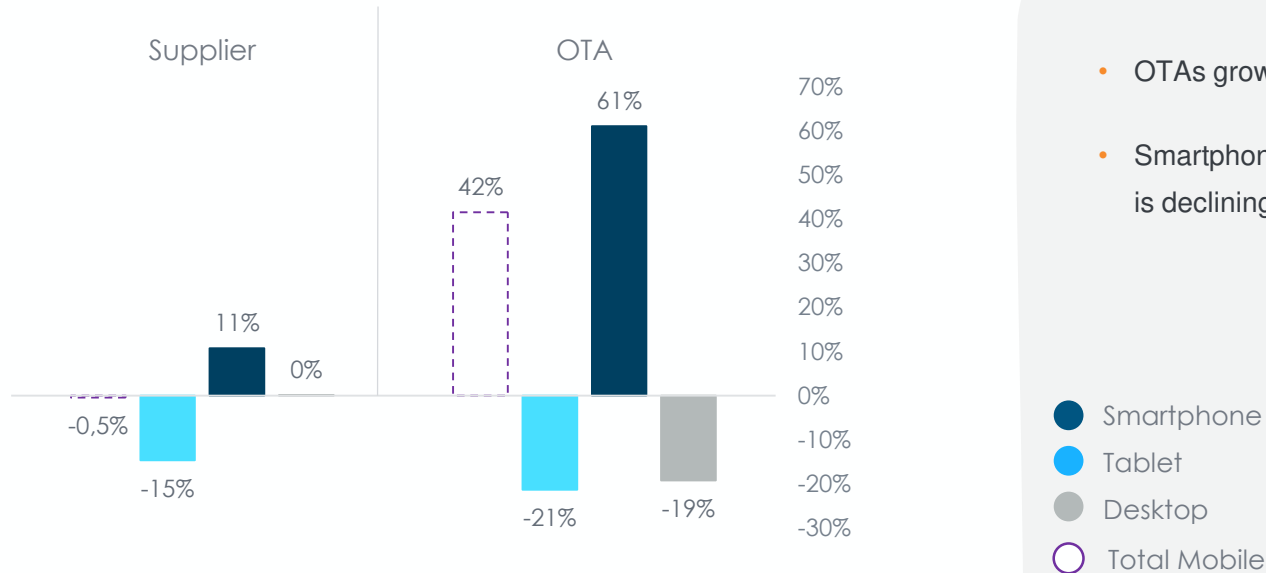
- As suppliers lag behind, OTAs get most of the mobile bookings

- Smartphone
- Tablet
- Desktop

# The gap between OTA and Supplier grew during 2017

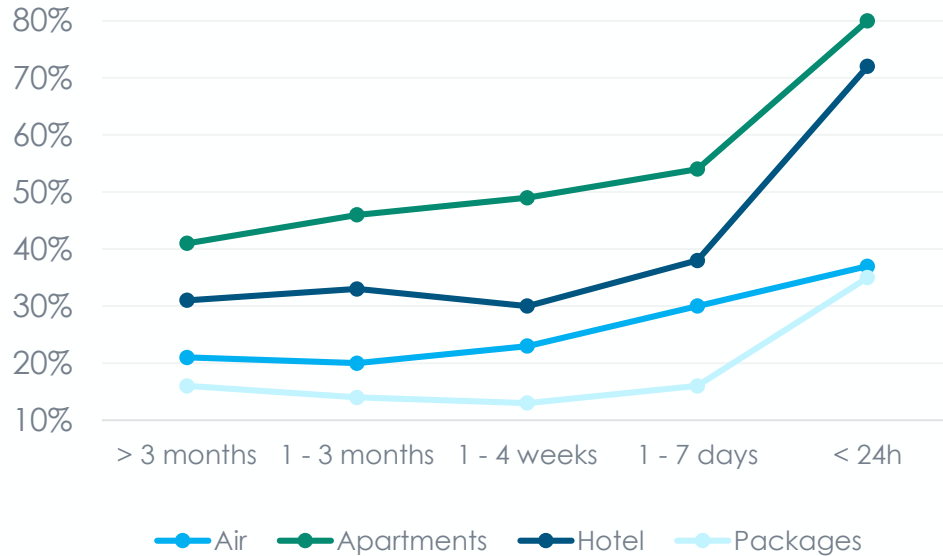


Growth of bookings per device, worldwide, Q4 2017 vs Q4 2016



- OTAs grow quicker on Mobile
- Smartphone is growing steadily and tablet is declining

# Mobile is key to catching last minute high-yield bookings



- Up to 80% of last minute bookings are made on mobile devices

# Thank you



To learn more about how the Criteo Commerce Marketing Ecosystem drives sales and profits for thousands of brands, retailers, and publishers worldwide, visit [criteo.com/about](https://criteo.com/about).

# Methodology



## Individual browsing and booking data analyzed:

Over 1,800 Travel advertisers globally.

More than 3b bookings per year across desktop, mobile sites and applications.

59 countries in North America (2), Latin America (9), Europe (25), Middle East (6), Africa (4) and APAC (14).

## How can marketers use this data?

Benchmark your performance on relevant KPIs for your mobile browser, mobile app and cross-device channels.



# Region Breakdown



## Europe

North	Poland
Belgium	Portugal
Denmark	Spain
Finland	Turkey
Ireland	
Netherlands	Central – MEA
Norway	Austria
Sweden	Germany
United Kingdom	Switzerland
South	Egypt
Czech Republic	Israel
France	Nigeria
Greece	Russian Fed.
Hungary	Saudi Arabia
Italy	South Africa

## Americas

North
Canada
United States
South
Argentina
Brazil
Chile
Colombia
Ecuador
Mexico
Peru

## APAC

North
Japan
South Korea
South
Australia
Cambodia
India
Indonesia
Malaysia
New Zealand
Philippines
Singapore
Taiwan
Thailand