

November 2, 2011

A PhoCusWright Webinar

Asia Pacific Online Travel Traffic Jam! *Special Focus on Australia, India and China*



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Asia Pacific Online Travel Traffic Jam!

Special Focus on Australia, India and China

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Agenda

Asia Rising

Travel & the Web

Traffic Trends for APAC OTAs

Q&A

U.S. IMMIGRATION AND CUSTOMS SERVICE
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僱傭工作
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IMMIGRATION

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3 SEP 2003

訪客 - 批准由下列日期起逗留 90 天
VISITOR - Permitted to remain in Hong Kong for ninety days from date of entry as shown below

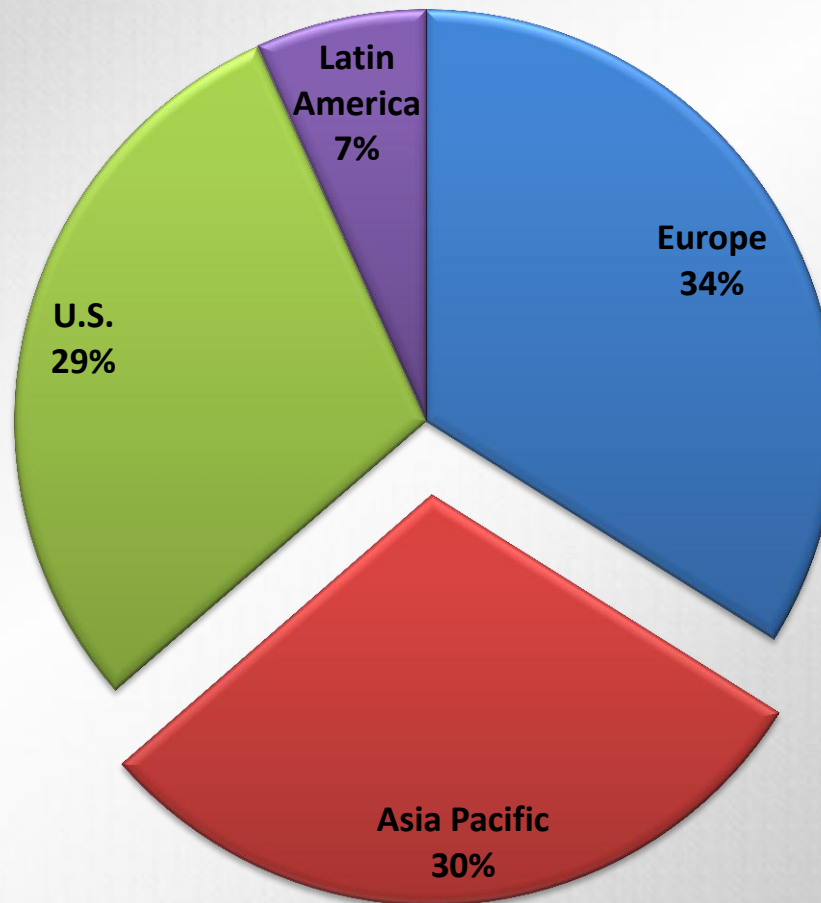
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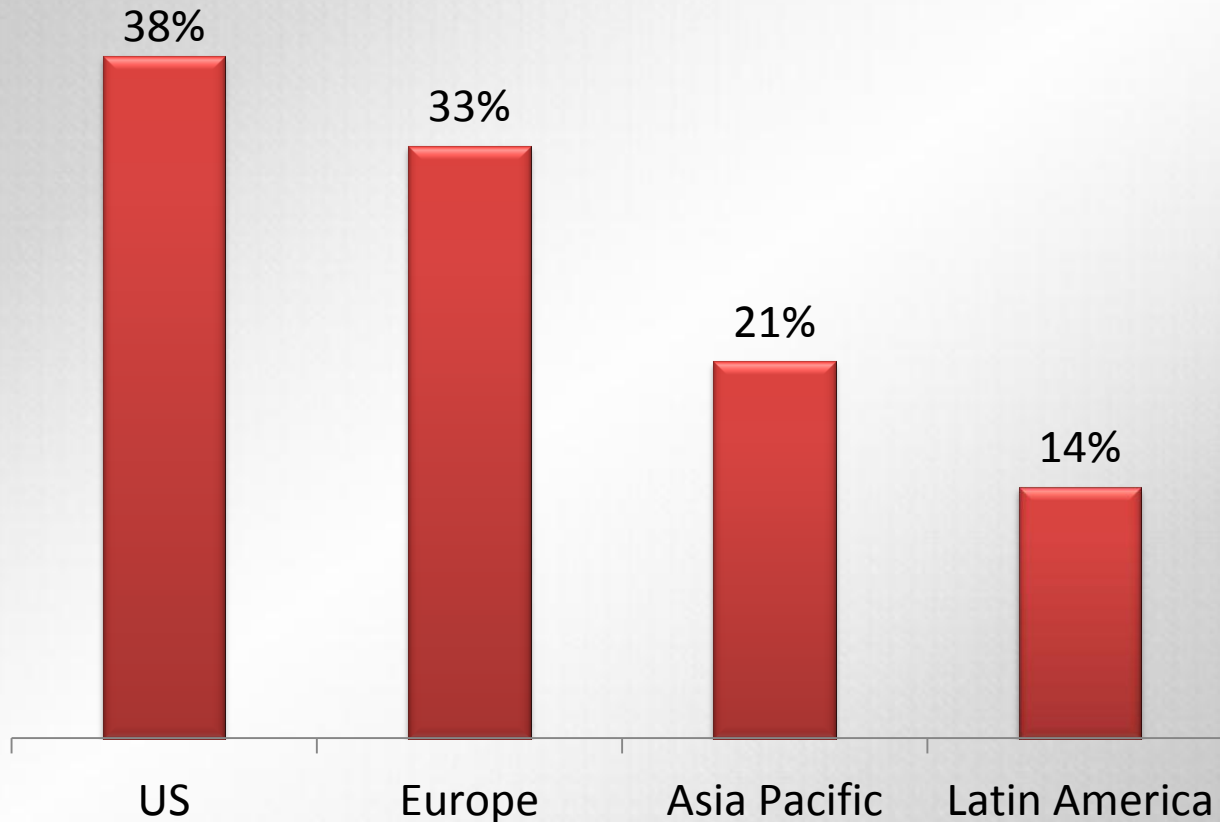
Global Total Travel Gross Bookings, Share by Region (%), 2010



Note: 2010 projected.

Source: PhoCusWright's Global Online Travel Market Second Edition

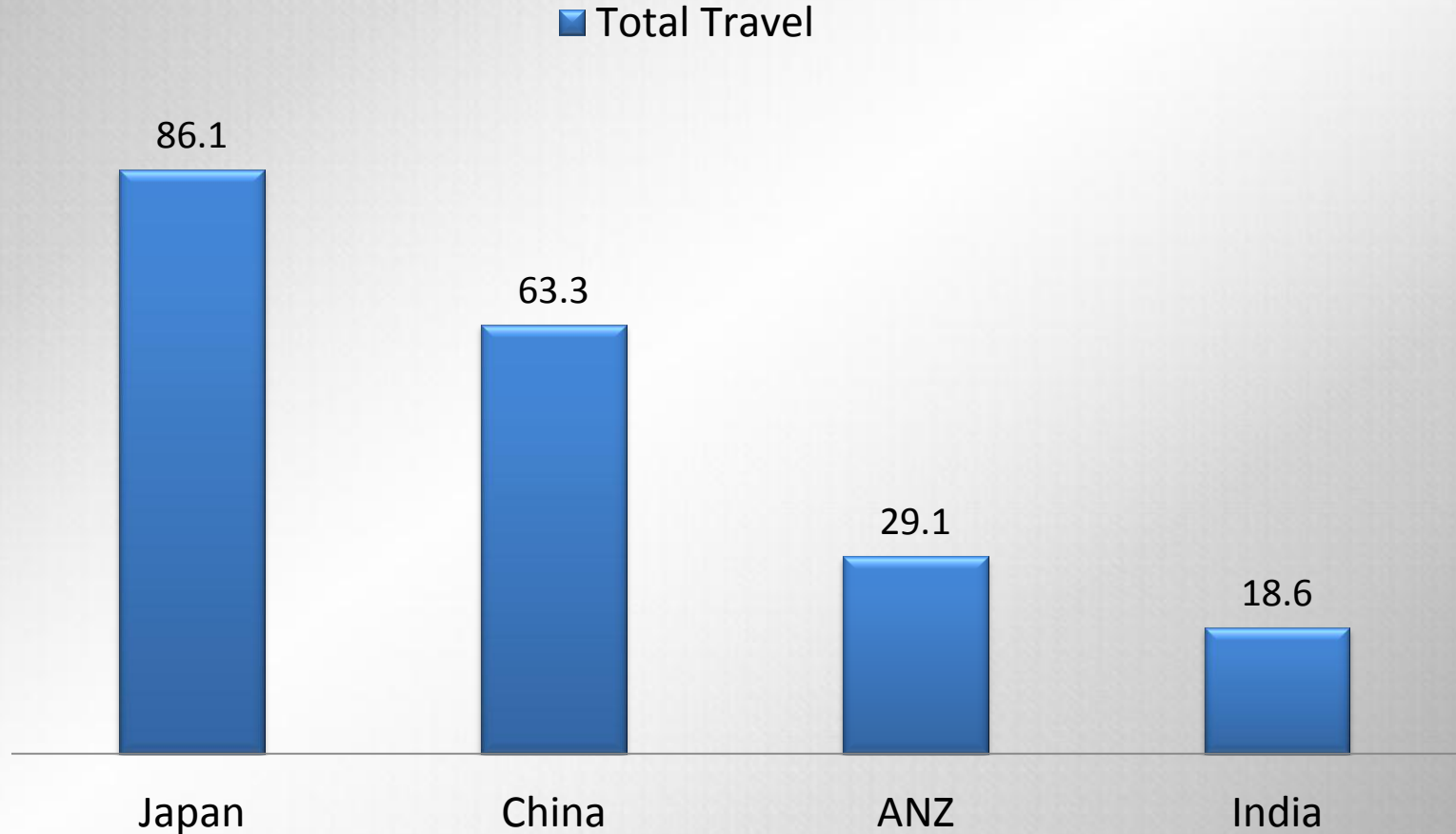
Online Travel Penetration (%) by Region, 2010



Note: 2010 projected.

Source: PhoCusWright's Global Online Travel Market Second Edition

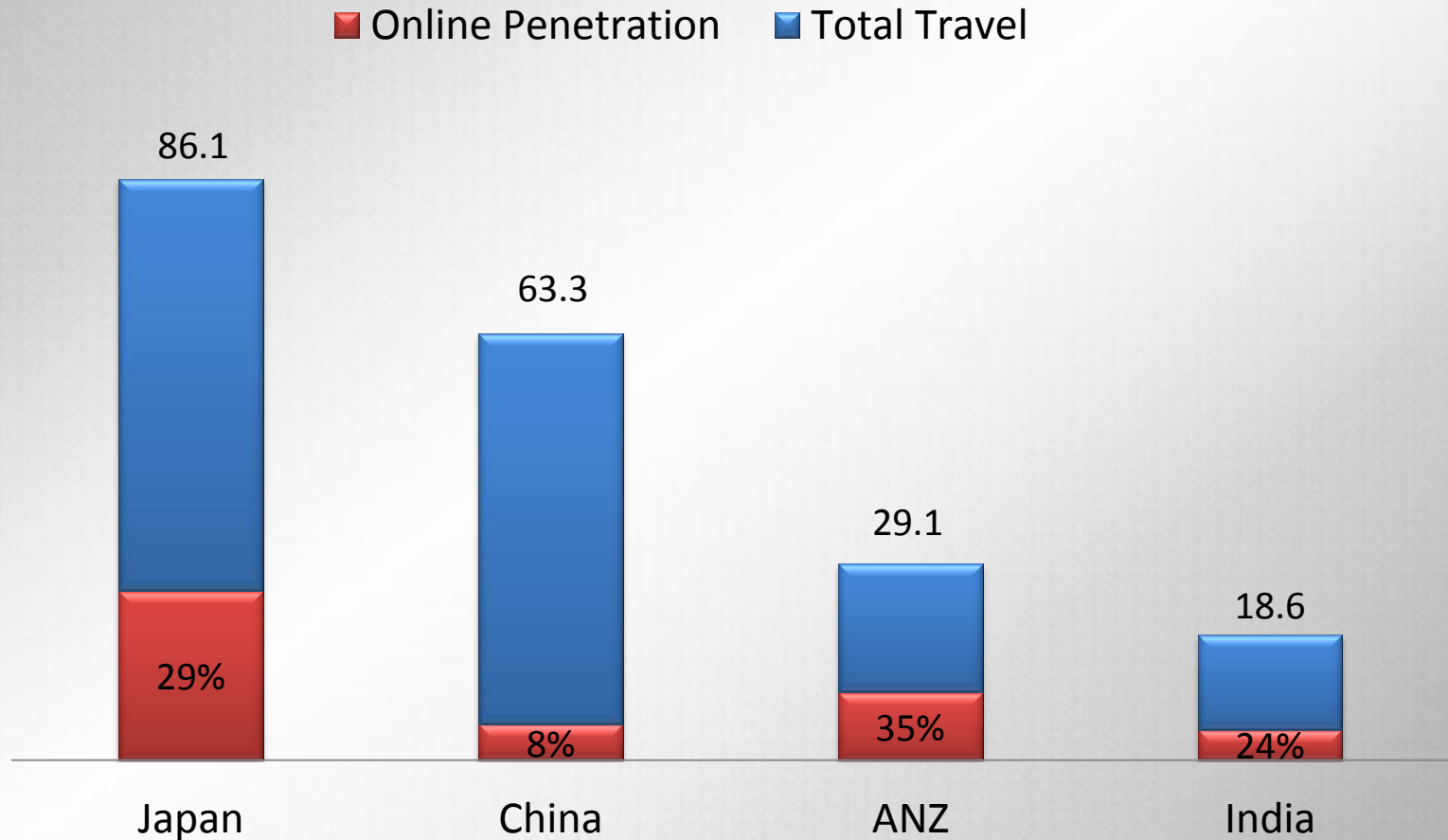
APAC Total and Online Leisure/Unmanaged Business Travel Gross Bookings (US\$B) and Online Penetration by Market (%), 2010



Note: 2010 projected

Source: PhoCusWright's Asia Pacific Online Travel Overview Fourth Edition

APAC Total and Online Leisure/Unmanaged Business Travel Gross Bookings (US\$B) and Online Penetration by Market (%), 2010

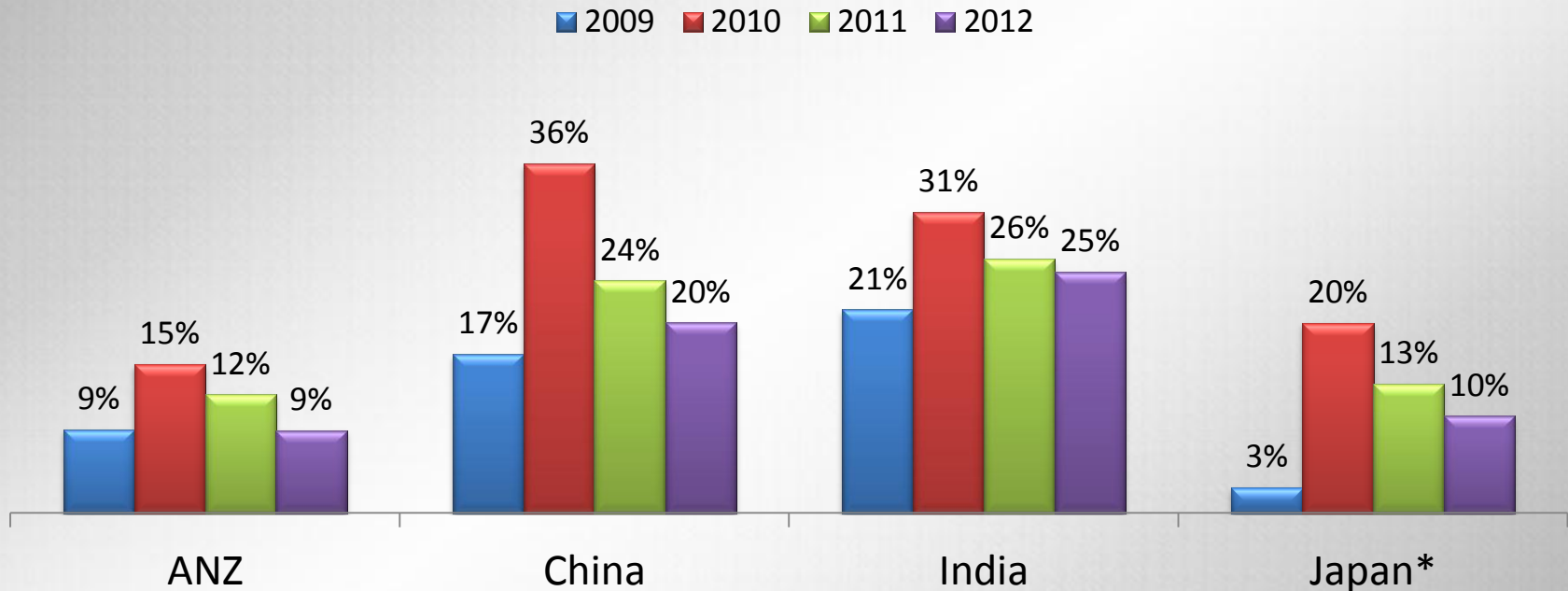


Note: 2010 projected

Source: PhoCusWright's Asia Pacific Online Travel Overview Fourth Edition

APAC Online Leisure/Unmanaged Business Travel Gross Bookings Annual Change (%) by Market, 2009-2012

Local Currencies



* Projections for Japan developed pre-March 11, 2011

Note: 2010-2012 projected

Source: PhoCusWright's Asia Pacific Online Travel Overview Fourth Edition

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Polling Question #1

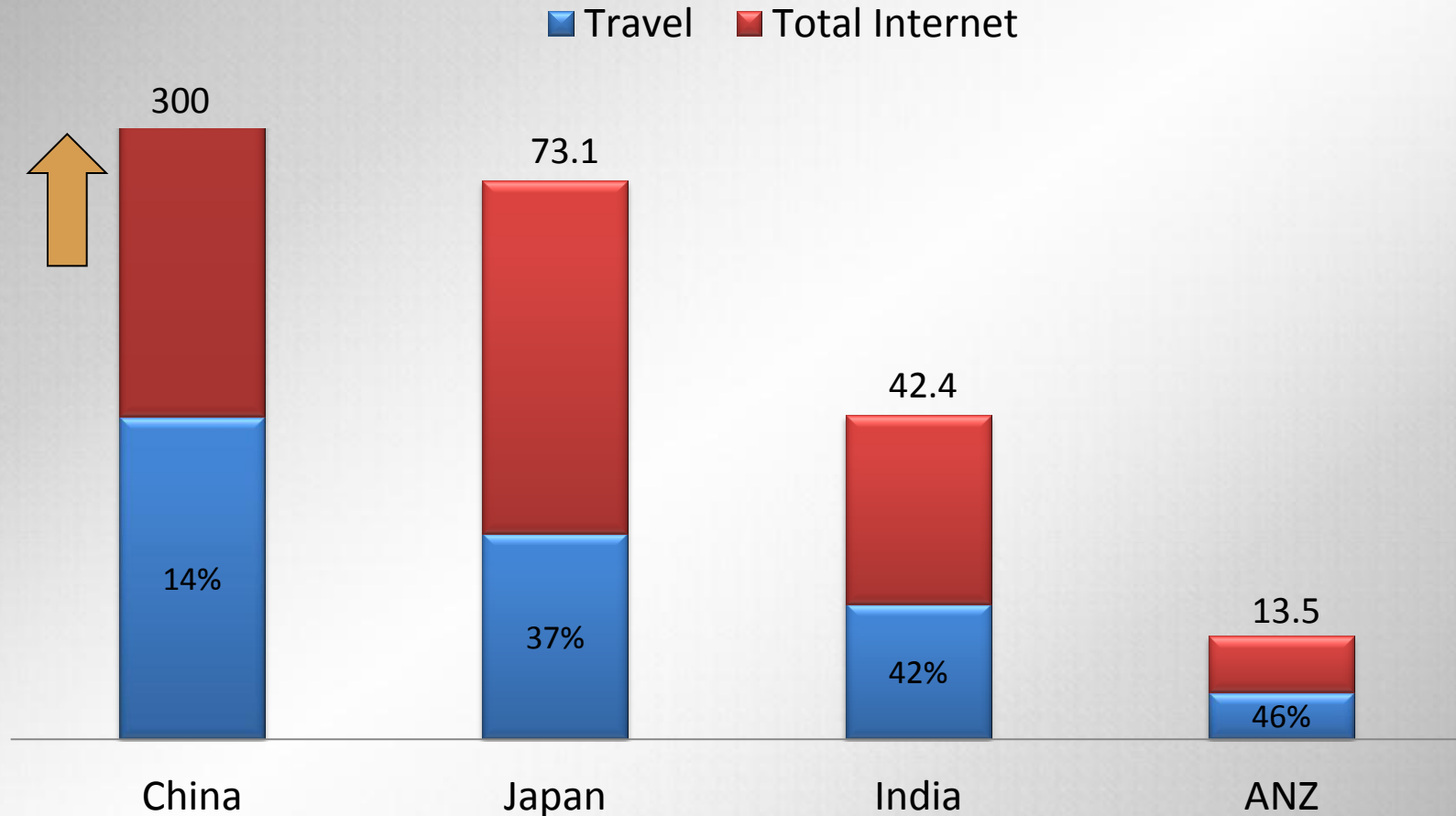
In which APAC market does the total Internet population have the highest penetration of online travelers?

- a. India
- b. Australia
- c. China
- d. Japan





Total Internet Monthly Unique Visitors and Travel Category Share by Country (in millions), 1Q11

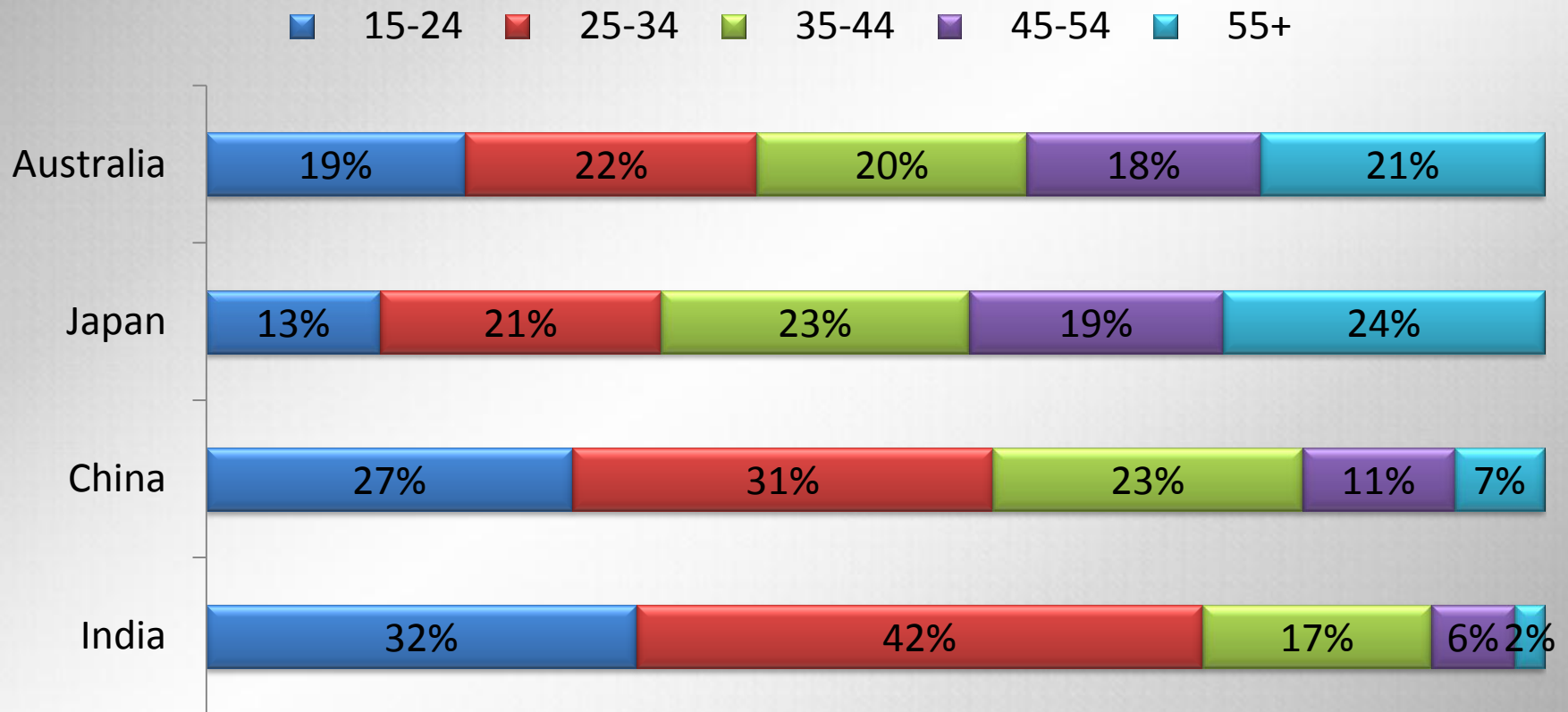


Sources: comScore, Inc. and PhoCusWright's Asia Pacific Online Travel Traffic Snapshot





Share of Travel Category Unique Visitors by Age Group (%) and Country, 1Q11



Sources: comScore, Inc. and PhoCusWright's Asia Pacific Online Travel Traffic Snapshot

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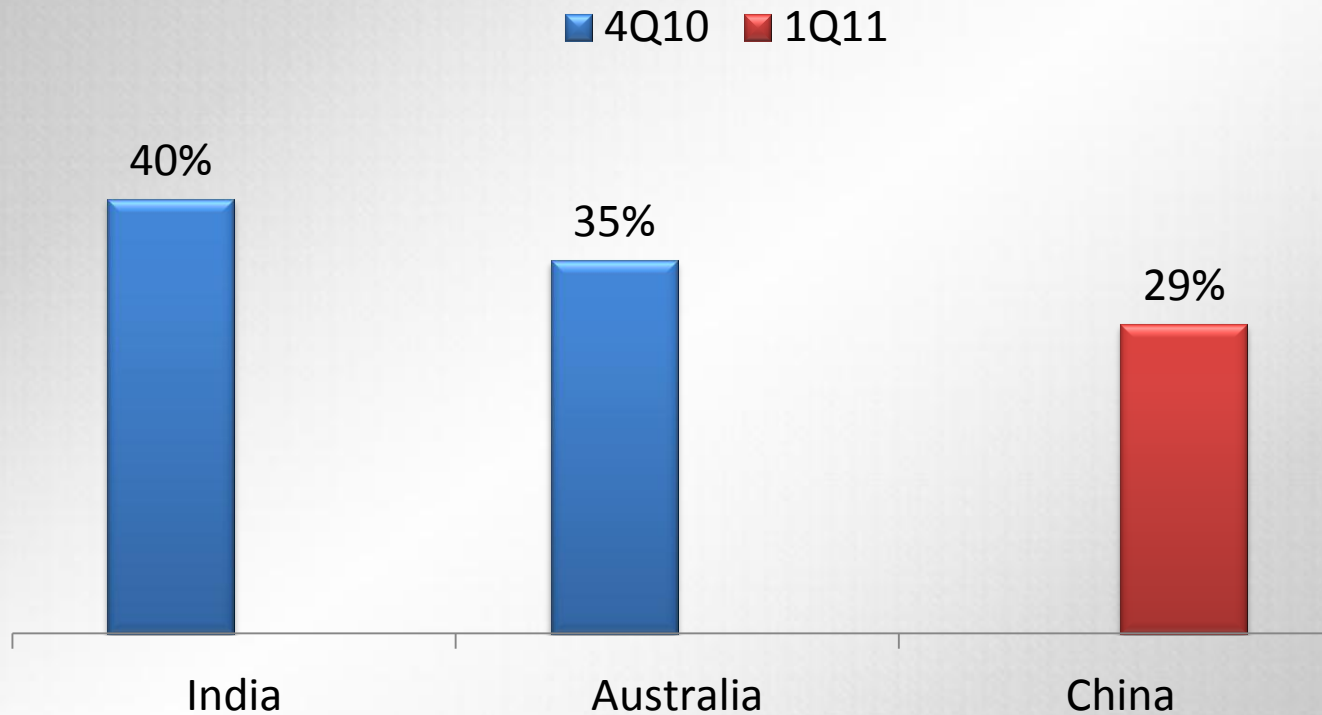
Methodology

- comScore proprietary panels were used to measure Web traffic to online travel categories across four APAC markets – Australia, China, India and Japan.
- PhoCusWright analyzed this data for a 15-month period to understand traffic trends and online shopping behavior to travel websites and categories.
- This webinar covers traffic trends to Australia and India for 4Q09-4Q10, and China for 1Q10-1Q11.
- Mobile platforms are excluded from this analysis.





Online Travel Agency Traffic Penetration of Total Travel Category by Market (%)



Sources: comScore, Inc. and PhoCusWright Inc.



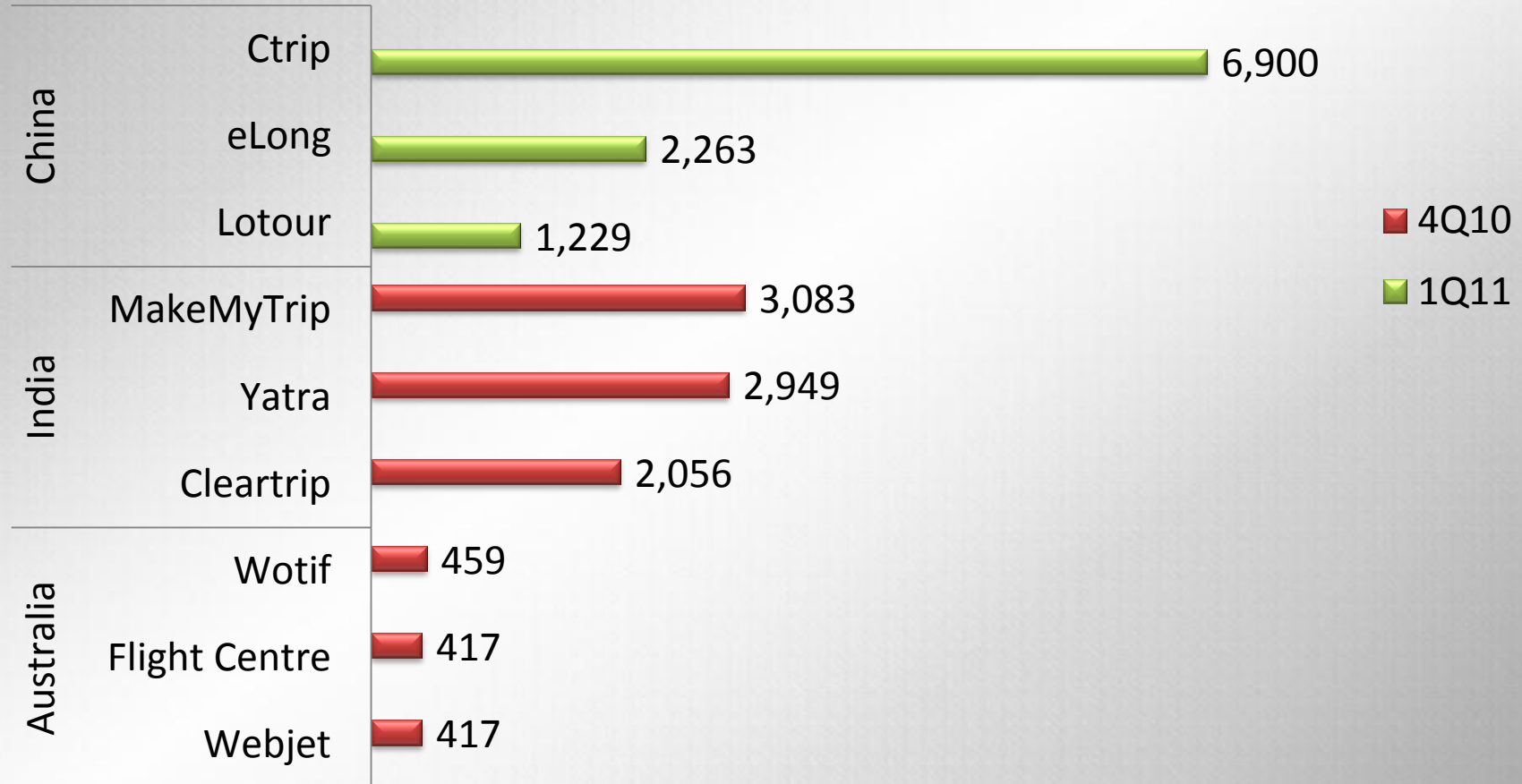

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The Ultimate
Adhesive
A product from Pidilite Industries Ltd.

Rail Rules in India!



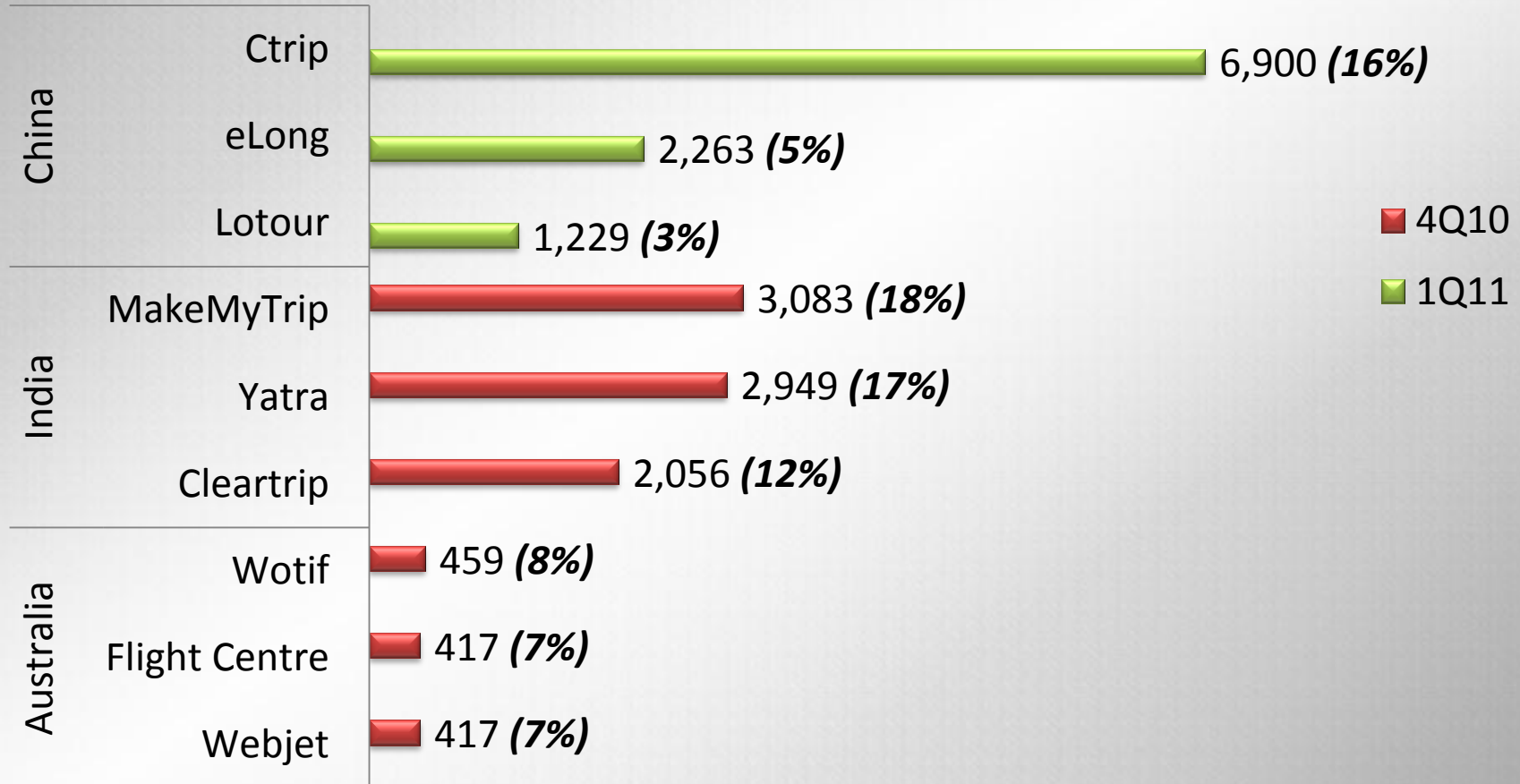


APAC Online Travel Agencies' Average Monthly Traffic (000s) and Share of Visitors to Travel Category (%) by Country



Sources: comScore, Inc. and PhoCusWright Inc.

APAC Online Travel Agencies' Average Monthly Traffic (000s) and Share of Visitors to Travel Category (%) by Country



Sources: comScore, Inc. and PhoCusWright Inc.

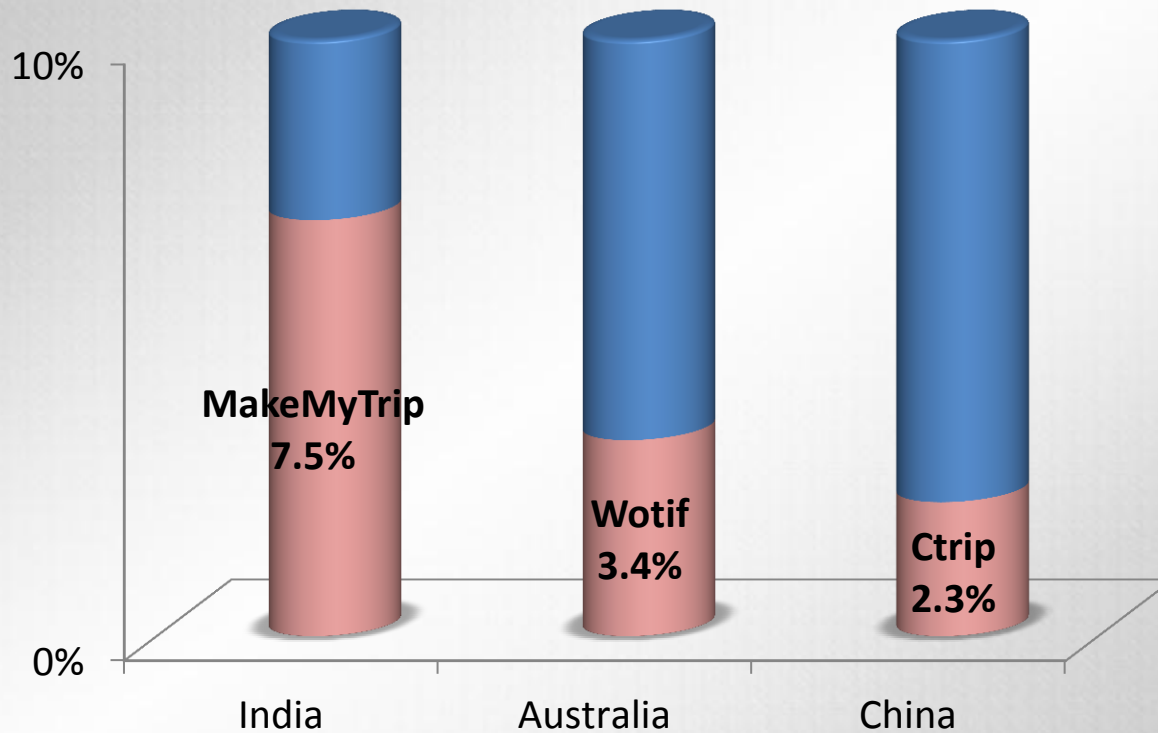
Polling Question #2

Which APAC OTA, in terms of its visitor traffic, has the highest penetration of the total Internet population in its country?

- a. Ctrip
- b. MakeMyTrip
- c. Wotif



OTA Visitors: Share of Total Internet Users by Country (%)



Sources: comScore, Inc. and PhoCusWright Inc.



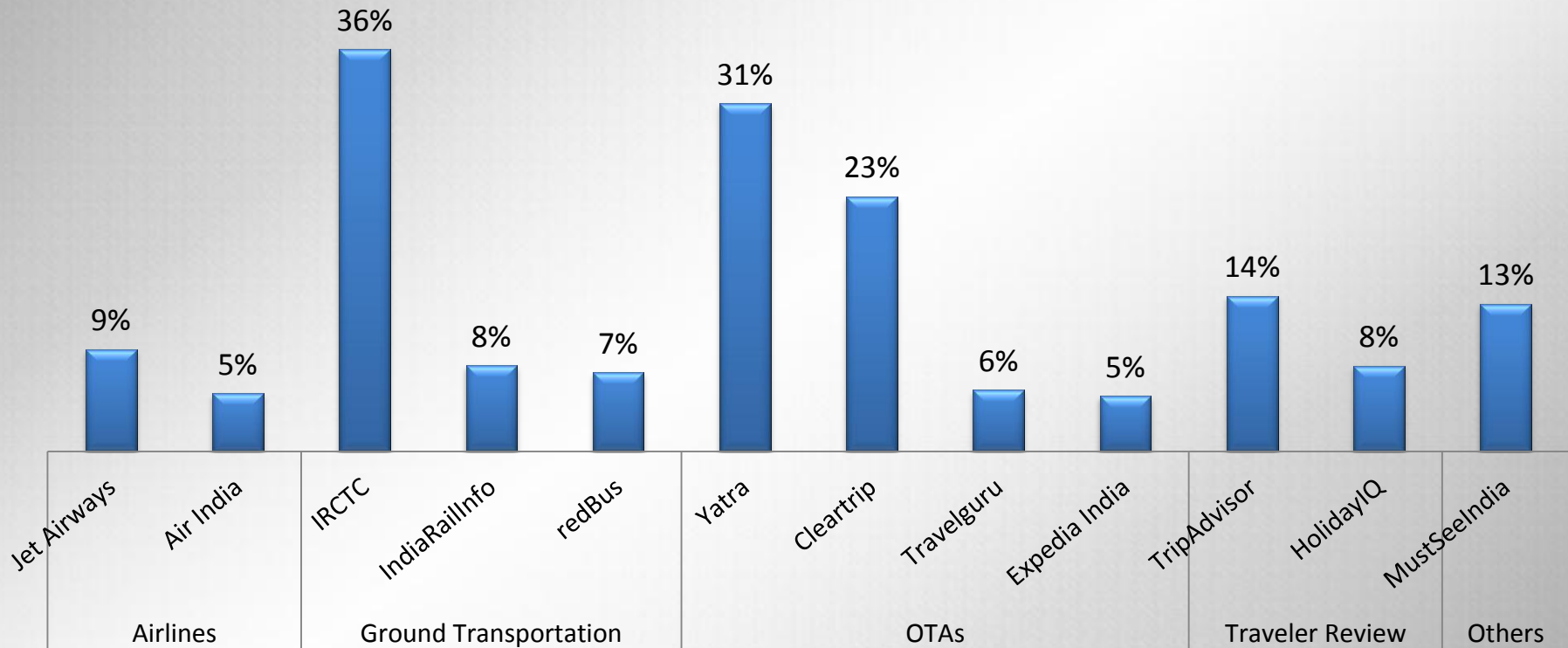
Comparative Travel Category Cross Visitation for Wotif, December 2010



* lastminute.com.au is a subsidiary of Wotif Holdings Limited.

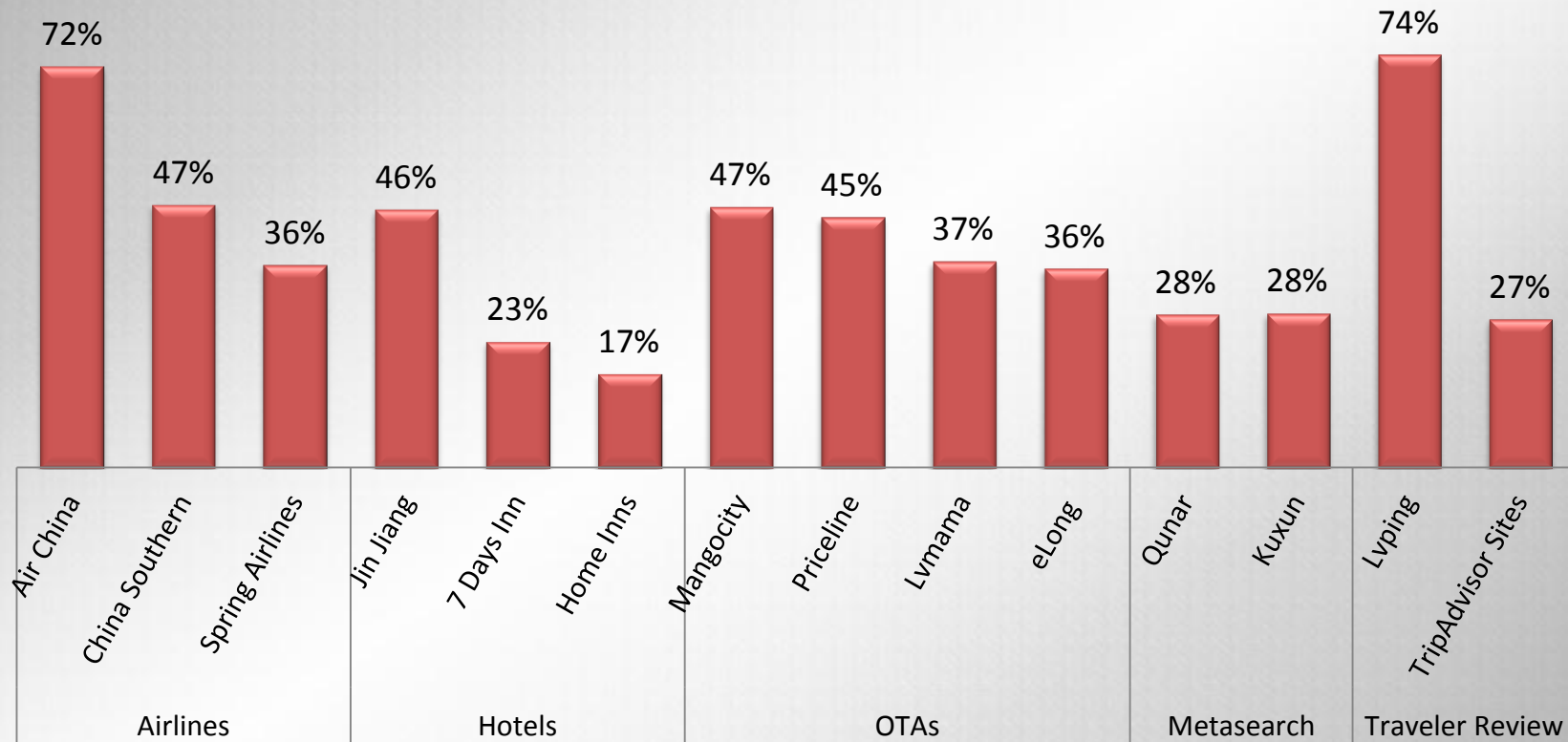
Source: comScore, Inc. and PhoCusWright's Australian Online Travel Traffic Report

Comparative Travel Category Cross Visitation for MakeMyTrip, December 2010



Source: comScore, Inc. and PhoCusWright's Indian Online Travel Traffic Report

Comparative Travel Category Cross-Visitation for Ctrip, March 2011



Source: comScore, Inc. and PhoCusWright's China Online Travel Traffic Report



travel

Google Search

I'm Feeling Lucky



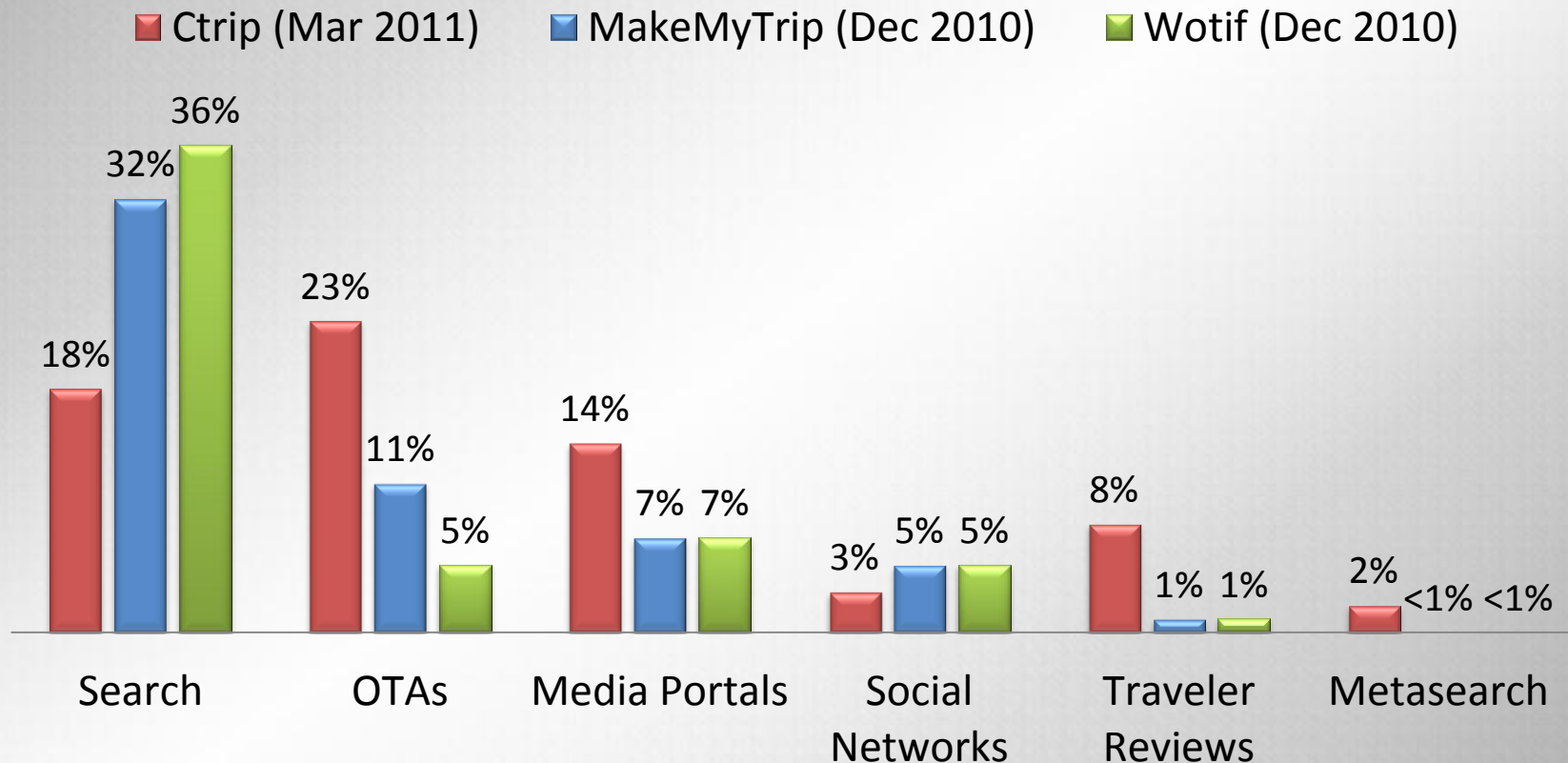
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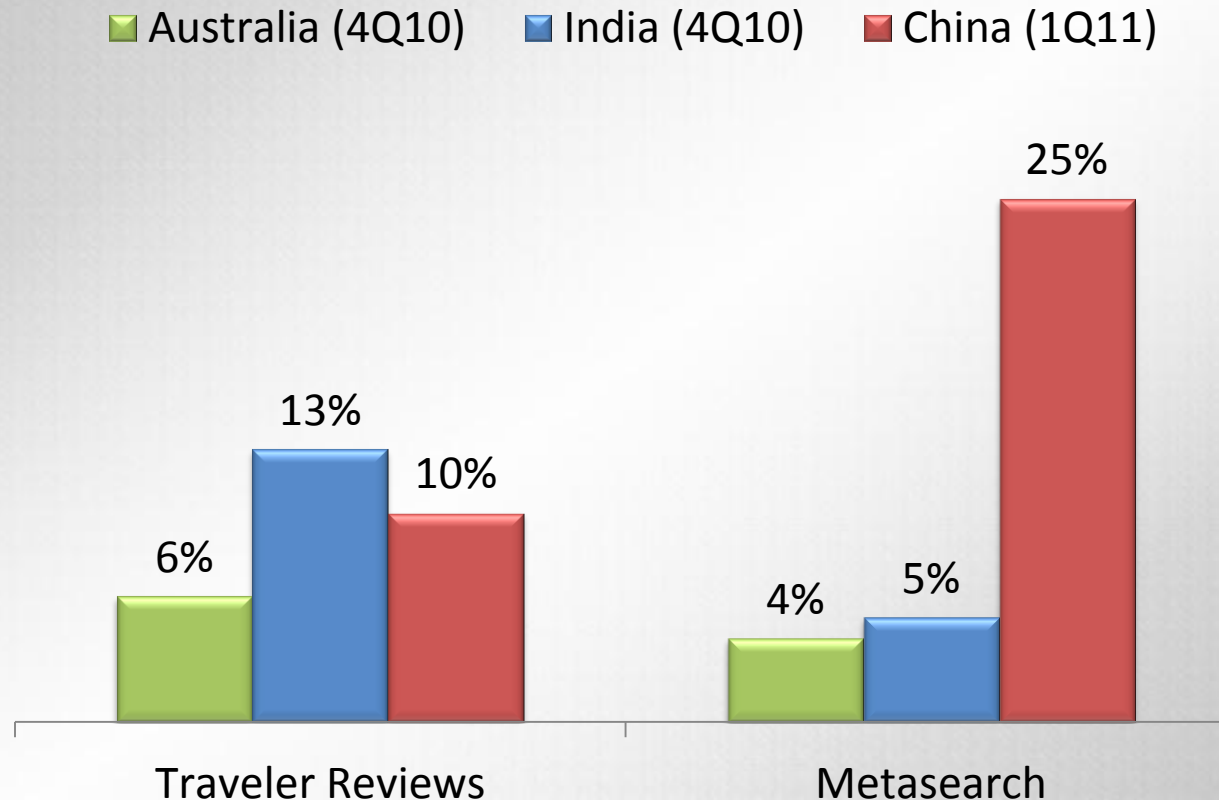
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Source Traffic to Leading APAC OTAs, Share by Category (%)



Sources: comScore, Inc. and PhoCusWright Inc.

Online Travel Traffic Penetration: Traveler Reviews and Metasearch by Country (%)



Sources: comScore, Inc. and PhoCusWright Inc.



Crowded, but Still Room to Maneuver



Questions?



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Cathy Schetzina

*Director, Communications
and Senior Research
Analyst*



Presenter:

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