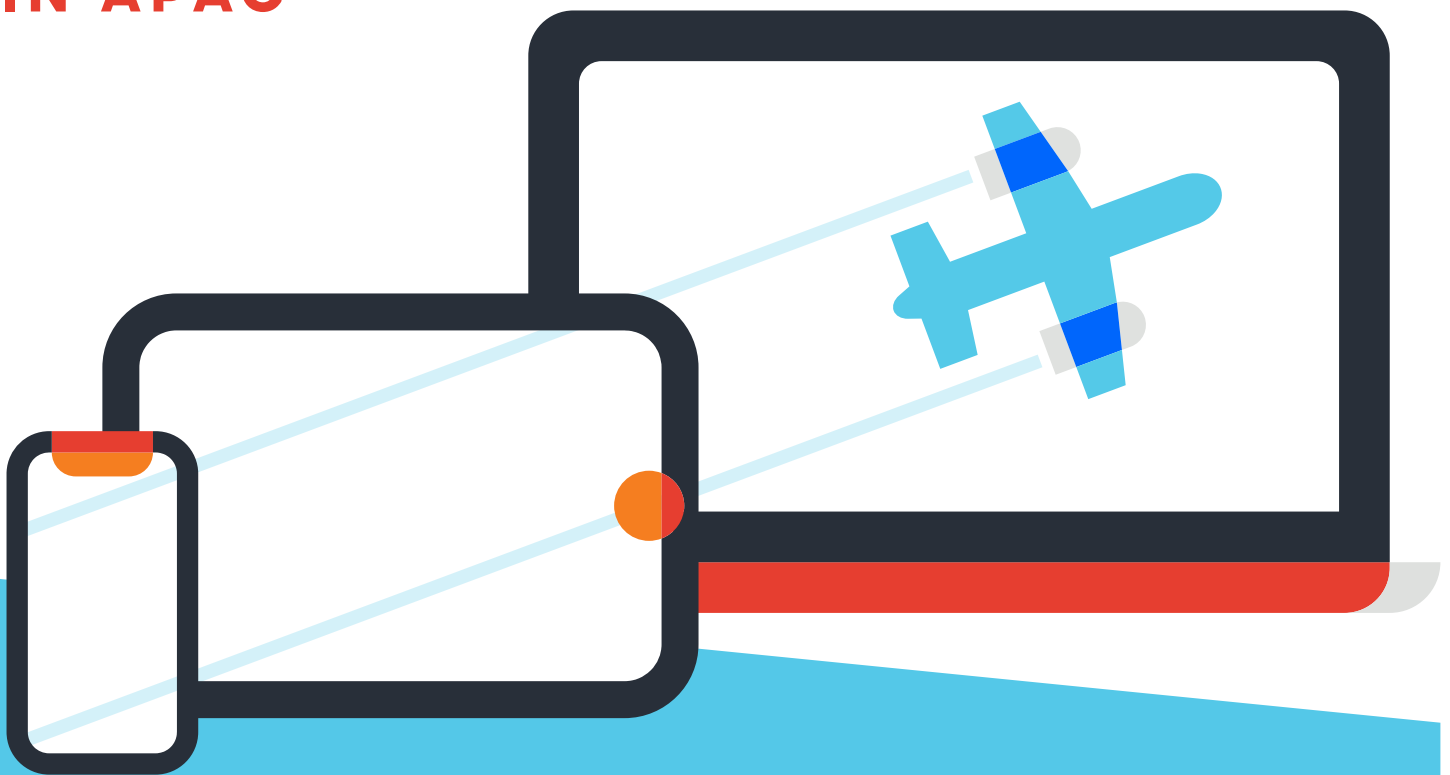


Digital Travel Landscape

IN APAC



A Comscore study on trends and characteristics
of the travel audience in the APAC region

Introduction

This report provides a snapshot of the digital travel landscape, using audience sizes, demographics and behaviours across all digital platforms to identify trends and unique characteristics of the different markets in the APAC region.

The report contains statistics for the following markets: **Australia, China, Hong Kong, India, Indonesia, Japan, Malaysia, Singapore, Taiwan** and **Vietnam**. All population statistics are limited to audiences of age 18 and above.



Overview of the travel industry

Penetration is highest in Taiwan, but China has the largest market.

The digital landscape in APAC is shaped by the Chinese and Indian consumer to a large extent, and the travel industry is no exception. China and India have the highest number of users of travel websites, with 311 million (38%) and 152 million (54%) respectively. Each of China and India independently have a greater audience than Australia, Hong Kong, Indonesia, Japan, Malaysia, Singapore, Taiwan and Vietnam combined. There are also

differences in the adoption of online travel services by market. In Taiwan, for example, 75% of online consumers accessed a travel website, whereas in Vietnam 9% did. Taken together, the APAC region still has plenty of room for expansion: online travel adoption in all APAC markets is still below the 84% level that markets such as the United States currently enjoy.

MARKET	TRAVEL AUDIENCE	
	UNIQUE VISITORS (IN MILLIONS)	% OF TOTAL DIGITAL POPULATION
China	311	38%
India	152	54%
Indonesia	30	34%
Japan	30	39%
Taiwan	11	75%
Australia	10	56%
Malaysia	7	43%
Vietnam	4	9%
Hong Kong	4	68%
Singapore	3	57%

Source: Comscore MMX Multi-Platform, January 2019

Composition of the travel industry

Travelling requires a certain degree of preparation, up to a point.

The travel industry is composed of various categories of online services. These categories, as well as the size of their digital audiences, are listed in the table below. Because of the size of the Chinese and Indian markets, the following table separates China and India from other APAC markets.

CATEGORY	DESCRIPTION	DIGITAL POPULATION: UNIQUE VISITORS (IN MILLIONS)		
		APAC EXCLUDING CHINA & INDIA	INDIA	CHINA
Travel		99	152	311
Travel Information	Sites that provide information on hotel reservations, air travel reservations, maps, discount travel options/packages. These sites do not support transactions.	55	42	46
Online Travel Agents	Sites that allow users to get information and/or book transactions related to a variety of travel services.	27	57	198
Ground & Cruise	Sites that provide information and/or transactions for rail, bus, and ship travel.	26	71	129
Hotel / Resort / Home Sharing	Sites that contain information and/or transaction capabilities for resorts and hotels. This sub-category also includes casinos that allow consumers to find information or book transactions at their hotels.	17	27	34
Airlines	All airline sites—most of which support online transactions—plus any third-party travel sites that provide information and/or transactions for only air travel.	13	16	32
Car Transportation	All car rental/car sharing/taxi services most of which support online transactions.	4	64	64

Source: Comscore MMX Multi-Platform, January 2019

COMPOSITION OF THE TRAVEL INDUSTRY

In the APAC region (excluding China and India), travel information sites are the largest category with 55 million unique visitors. In China and India however, the travel information category ranked fourth, with 46 and 42 million unique visitors respectively. In both countries, categories such as online travel agents, ground & cruise and car transportation, which allow the purchase of travel services, ranked in the top 3 categories of travel sites.

In India, this is because travellers tend to travel domestically by land or sea rather than airlines. This can be seen by India's top 2 categories of travel sites – ground & cruise and car transportation, with 71 and 64 million unique visitors respectively. The tendency of travellers in India to travel by train and bus, Indian Railways and redBus, is a major contributing factor. The rise of ridesharing apps such as Uber and Ola Cabs contributes to this as well.

On the other hand, online travel agents dominate the travel landscape in China, with 198 million unique visitors in January 2019. This volume is largely due to the dominance of Ctrip, Alitrip (also known as Fliggy) and Qunar, travel booking sites that provide travel services including accommodation and transportation reservations, packaged tours and so on. Ctrip.com had 95 million unique visitors in January 2019, a 26% increase from December 2018.

Profile and behaviour of online travel consumers

The affinity towards online travel services differs by age groups across markets.

A comparison of the affinity¹ of different age groups towards online travel services shows that the 25-34 are more inclined to consume such services, particularly in Hong Kong and Taiwan. On the other hand, in markets such as Australia, Indonesia and Japan, the 45-54 segment shows higher affinity.

AGEGROUP	AUSTRALIA	HONG KONG	INDONESIA	JAPAN	MALAYSIA	SINGAPORE	TAIWAN	VIETNAM	INDIA	CHINA
15-24	75	104	102*	52	102	137*	68	102*	102	87
25-34	100	150	105	72	122		134		108	108
35-44	98	107		103		118	125			118
45-54	109	104	119	125	97	70	108	86	94	112
55+	137	73		126		44	64			87

Source: Comscore MMX Multi-Platform, January 2019

¹An index of 100 means that the selected demographic is equally represented in the segment's audience as it is in the total internet; an index higher than 100 indicates that the selected demographic is over-represented in the segment's audience, and an index under 100 indicates that the selected demographic is under-represented in the segment's audience.

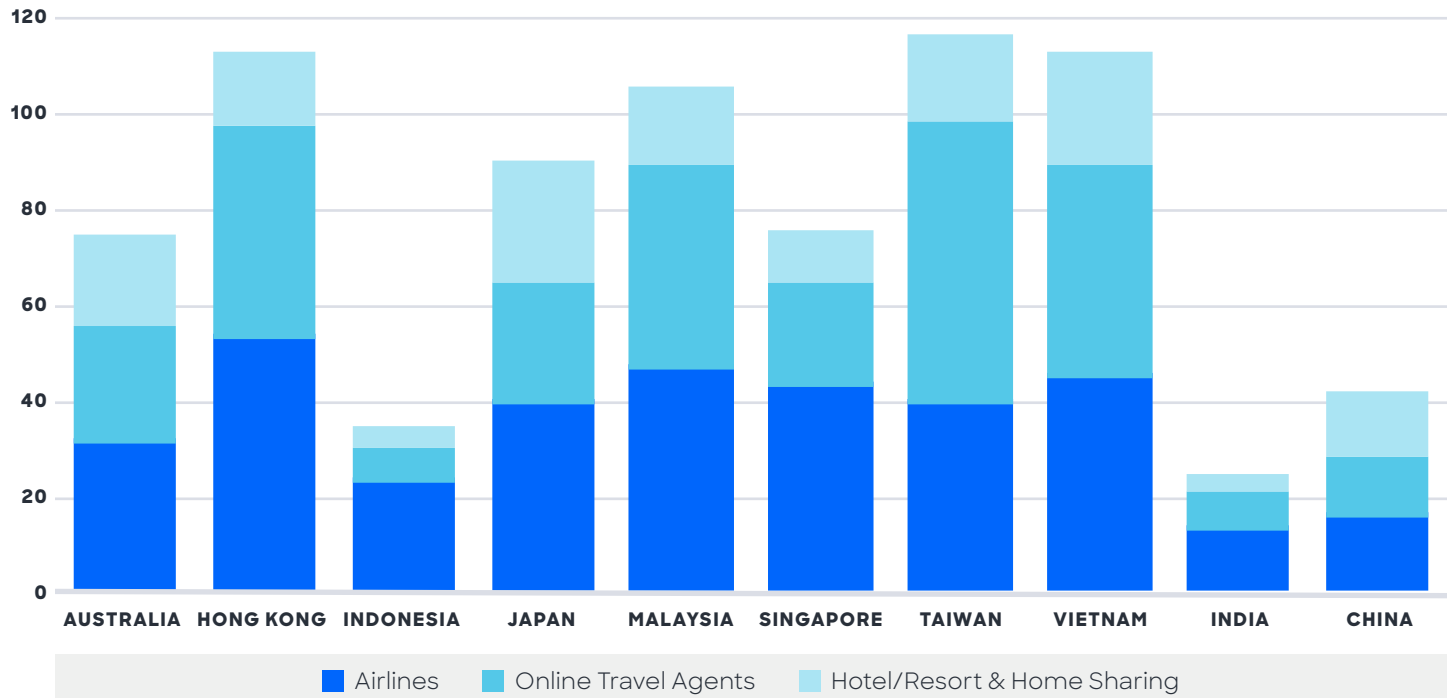
* Data from age group 18-24/18-34 was used in these markets

ONLINE TRAVEL CONSUMERS

Analysing how frequently consumers visit travel sites helps marketers better understand their interests. The most frequently visited sites in January 2019 were airlines, online travel agents and hotel / resort / home sharing. During that period, the 3 markets where consumers visited these categories most were Taiwan, Vietnam and Hong Kong. Among these three markets, Taiwan had the highest average view per visitor (59) in online travel agents; Vietnam had the highest average view per visitor (24) in hotel / resort / home sharing; while Hong Kong had the highest average view per visitor (54) in airlines.

In India and China, the frequency of visits was relatively low. This is because users there tend to spend longer on each page - 8.6 and 1.7 minutes per view, respectively, on online travel agents' sites. In comparison, users in Taiwan, Vietnam and Hong Kong spent 0.9, 0.7 and 1.0 minutes per view, respectively, on such sites.

Average Views per Visitor



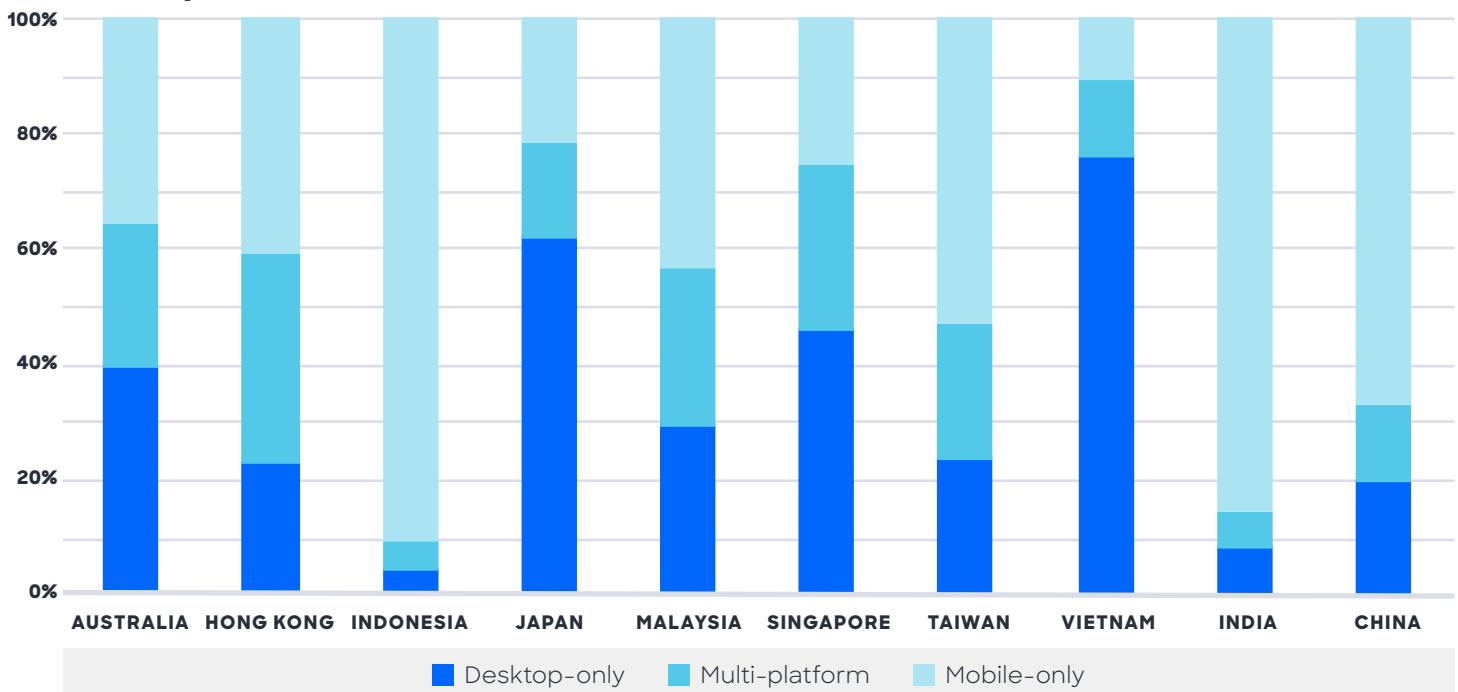
Source: Comscore MMX Multi-Platform, January 2019

ONLINE TRAVEL CONSUMERS

It is also important to understand what devices consumers use to access travel websites. Mobile devices can be used on the go and, with the optimisation of content for mobile devices, the smaller screen size is less of a constraint now. Desktop computers and laptops are, however, still better for casual exploration or in-depth information gathering due to their larger screens. The availability of internet access or stability of connection also plays a part in which device is preferred.

As a percentage of their digital population, India and Indonesia are home to the largest mobile-first populations², with over 85% of their digital population being mobile-only. Although China has a large mobile-first population on a percentage basis and the largest in terms of total digital population, the size of the combined desktop-only and multi-platform³ populations is still significant, with over 103 million unique visitors. Australia, Hong Kong, Malaysia and Singapore have digital populations that are spread quite evenly across the three platforms, with large combined desktop-only and multi-platform populations.

APAC comparison of travel sites access



Source: Comscore MMX Multi-Platform, January 2019

² Mobile-first populations access travel sites exclusively through their mobile devices

³ A multi-platform audience consists of individuals who access a travel site through a desktop as well as a mobile device.

How consumers interact with online travel agents

The consumption patterns of online travel agents differ by markets.

A look into consumer behaviour on online travel agents' sites provides insights into consumption patterns.

The frequency and duration of visits to online travel agents' sites reflects the reliance on such sites and level of consideration consumers have before making transactions.

MARKET	Visits per visitor per month*	Minutes per visit	Total minutes per visitor
China	16.6	6.6	110.0
Taiwan	4.4	12.4	55.2
Malaysia	4.5	10.4	47.3
Hong Kong	4.3	10.1	43.5
Vietnam	4.2	7.6	32.0
Australia	2.8	9.9	27.6
Singapore	3.3	8.3	27.3
Japan	3.1	7.6	23.3
Indonesia	2.9	6.0	17.4
India	4.3	3.2	13.7

Source: Comscore MMX Multi-Platform, January 2019

* Derived from manual calculation

ONLINE TRAVEL AGENTS

China leads in terms of visit frequency, with 16.6 visits per visitor in January 2019. However, they spend on average 6.6 minutes per visit, less than consumers in other APAC markets, indicating quick consumption of information or fast purchases. The short visits are more than made up for by the much higher frequency of visits: Chinese consumers spent 110 minutes on travel-related sites such as Ctrip.com. On the other hand, consumers in **Taiwan, Malaysia** and **Hong Kong** visit online travel agents' sites less frequently, over 4 times per month, but stay on them longer – over 10 minutes per visit. As a result, total time spent on such sites per visitor was more than 43 minutes in these three markets in January 2019.

Indonesia and **India** follow a different trend. Both the number of visits and time spent per visit are relatively low, resulting in low total time spent on these sites per visitor in January 2019. It can be said that consumers in Indonesia and India spent more time going direct to sites in categories such as ground & cruise and car transportation for transactions related to travel, rather than booking them indirectly through travel agents. Users in Indonesia spent 38.4 minutes per user on ground & cruise sites while users in India spent 26.1 minutes per user on car transportation sites in January 2019 – each being the top category in terms of total minutes per visitor for each country, respectively.

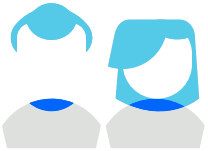
Conclusion

What are the key takeaways for the travel industry?



There is room for growth.

While India and China have the highest number of users in APAC that accessed travel websites, both markets still have room for growth, with the proportion of their digital audiences visiting travel sites below the levels of more mature markets.



Preference differs by age groups across markets.

A comparison of the affinity of different age groups towards online travel services shows that the 25-34 are more inclined to consume such services, particularly in Hong Kong and Taiwan. On the other hand, in markets such as Australia, Indonesia and Japan, the 45-54 segment shows higher affinity.



It is important to understand what devices consumers use to access travel sites.

Consumer behaviour is different from market to market. Although accessing travel sites through mobile is increasing, the extent to which different markets rely on mobile versus desktop varies. Some markets such as India and Indonesia have a large proportion of mobile-only internet users, while multi-platform internet usage is more common in others.

For more information on the digital travel landscape in APAC or Comscore's custom solutions, please visit us at comscore.com/learnmore