

Indian Travelers Online



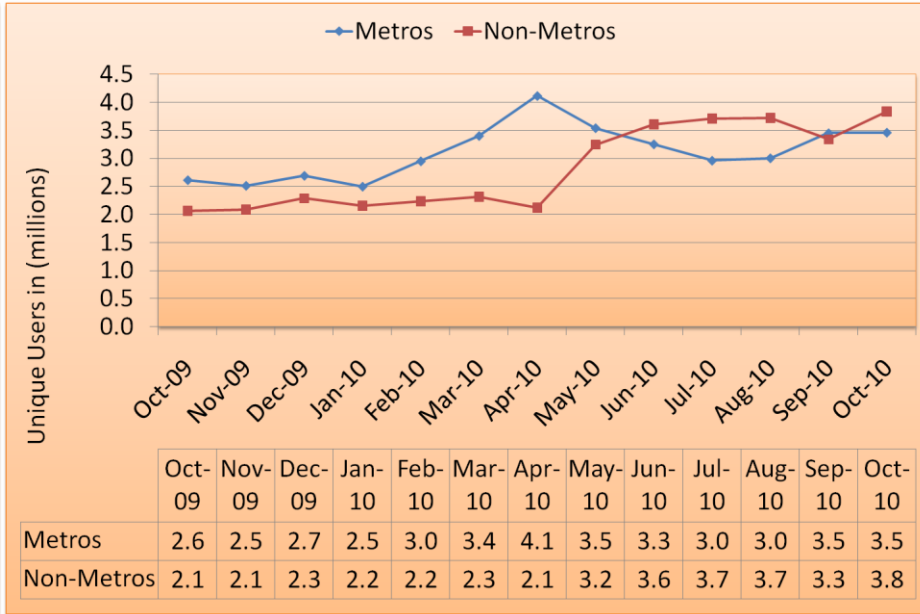
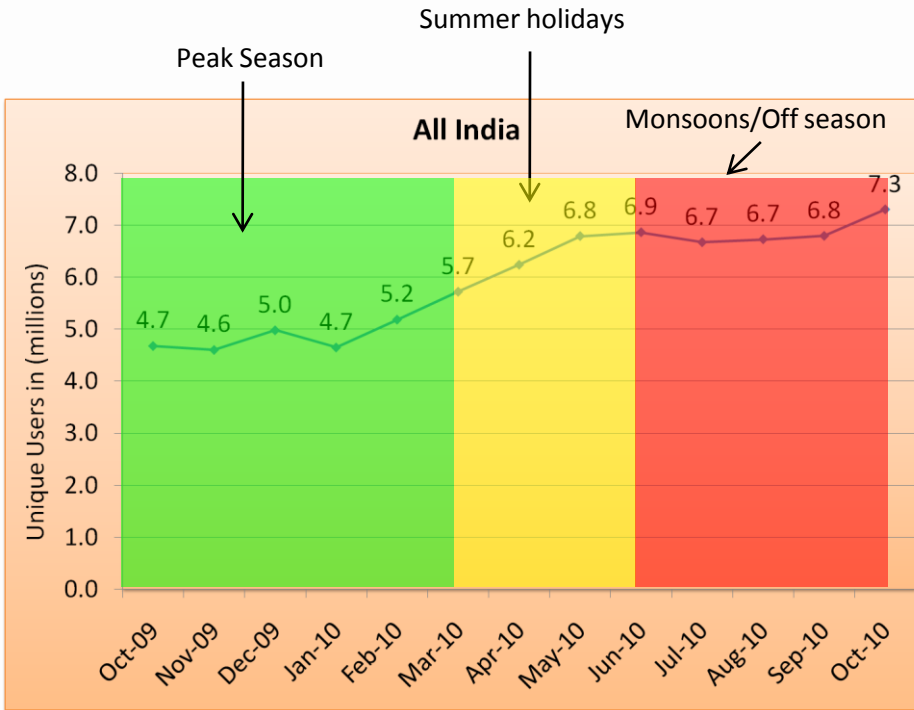
Report by Vizisense Research

Overview

- The Indian active online audience is nearing the 60M mark, growing about 30% annually. Around 27% (16M) of these were found on travel related websites in Oct 2010
- **Makemytrip, Yatra and Cleartrip** are the top three OTAs (as per their Monthly Unique audience)
- **Jet Airways** leads the pack of airlines with SpiceJet, Kingfisher and GoIndigo constantly competing for the second spot
- Travel category for this report comprises of Online Travel Agents and Airline sites.
- The Travel category has grown by 55% since last one year. This higher percentage of growth in this category makes it as one of the most interesting categories to watch out for in the coming time
- Analyzing the demographics of the users, we realize a considerable difference between people who come to browse the websites for finding the cheapest tickets and those who went on to book the tickets through OTAs
- The next slide shows the month on month growth of travel websites and also the distinction between traffic coming from top eight metros and the rest of India.



The category has grown 55% since last year



- Summer holidays (March to June) see high usage, which plateaus June onwards with the start of monsoon i.e. the off-season. Interestingly, non-metros are more active during the off season period of July – September

Metros: Mumbai, Delhi, Kolkata, Chennai, Hyderabad, Bangalore, Pune, Ahmedabad

Non-Metros: Rest of India other than the top 8 metros above



Key questions answered by this report

- Growth of travel as a category in past one year : OTAs and Airlines: Who's driving the category and where?
- What are the demographics of people who visit these sites?
- Which are the top OTA and Airline sites and what is the amount of user duplication among them?
- Are there any significant demographic differences between users of OTAs?
- Which day of the week and what time of the day do these websites see maximum usage?
- Which website sees maximum repeat users on a monthly basis ?
- On which website do users spend maximum time?
- What is the product among domestic , international, hotel and railways users look for most on different OTA websites?
- What are the differences in the ratio between one way and return flights searched in case of domestic and international flights?
- What is the differences in the ratio between different number of travelers searched in case of domestic and international flights?



Key questions answered by this report

- What are the most searched travel routes for domestic flights?
- What are the top international destinations searched by Indians?
- What are the top holiday destinations searched by Indians?
- How much in advance from the day of travel do Indians book their tickets?
- What is the visitor to buyer conversion ratio on OTAs?
- Are there any significant demographic differences between people who come to websites to check the ticket prices and those who book tickets through OTAs?
- What are the sources of traffic to OTA sites? Which site has the highest organic traffic?



Methodology

- The online behavior within the online travel category is the revealed behavior captured from the ViziSense panel of 100,000+ folks (as on November 2010)
- Net usage dynamics and behavior was captured from the 'active' internet users in each month, for the period Oct'09 to Oct'10

Panel Measurement:

- Tracks actual users & measures pre-verified demographics
- Accurate site stats based on actual usage

Publisher Tags:

- Improve accuracy through actual server requests and site usage data
- Gives additional information about international traffic

Advanced Techniques:

- Industry-leading Triangulation methodology that correlates data from panel & tags
- Demographic and usage-based clustering
- Iterative Proportional Fit Algorithm



Vizisense Methodology



Travel Category online (Traffic & Demographics)

Top travel websites

Demographic differences

Day and time of usage

Incidence of Repeat visits

Time Spent on a visit

Product Search Activity on OTAs

Deep dive in Product search activity on OTAs

Buyer Demographics on OTAs

Source of traffic



This report is part of the series of custom studies to demystify trends around online usage and behavior by the research team at ViziSense.

Unlike the usual methods of surveys and multiple-choice answers, these insights are drawn, analyzed and collated from the actual online behavior of a significant sample of online folks (as part of the ViziSense India Panel).

The entire report is available in PDF format. For further details, please contact: Anand Ramaswamy on +91 98206 91487 or anand.ramaswamy@vzisen.com

