

# ZUJI Online Travel Report

Consumer demographic and booking trends across Asia Pacific

Q1 2005: January - March



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## About ZUJI

# INTRODUCTION

The ZUJI Online Travel Report tracks online travel booking trends for flight, hotel and other bookings online in Asia Pacific on ZUJI, and from related sources. Results are rounded to show whole numbers in percentage tables.

For the first time, New Zealand booking trends are included in this report.

For further information on the report, trends or ZUJI, please contact ZUJI via email: [press@zuji.com](mailto:press@zuji.com).

# REPORT METHODOLOGY

This report combines data as taken from multiple sources including:

- Consumer web-site usage of ZUJI's own and Travel Partner Network online travel sites in Australia, New Zealand, Hong Kong, Singapore and Taiwan.
- ZUJI's own analysis and interpretation of proprietary booking data.  
Note: Asia Pacific averages includes some Taiwan booking trends, though specific Taiwan booking trend data is not detailed in this report.
- ZUJI member polls, conducted online (Tsunami/Phuket poll as detailed in this issue: 550 consumer responses in Q1 2005).

# SECTION 1 KEY FINDINGS

# KEY FINDINGS

## Special report: Phuket-Post Tsunami

- Post-tsunami, travellers tell ZUJI they'd return to the beach destination if they found a great deal, or if they knew they were helping the community by visiting.
- 40% of travellers would consider a return to Phuket for a great deal.
- 37% would return if they knew the money they spent on the trip would help the economy, or if there was a charitable contribution as part of their spend.
- 10% of travellers would visit for a special event like a concert.
- Currently, Phuket has dropped to become the 44th most popular destination booked on ZUJI. In Q2 2004, Phuket was the 15th most popular destination booked on ZUJI, so the drop is stunning. Although travellers are shying away from Phuket, they keep on visiting Bangkok (Bangkok, Thailand was the MOST popular destination booked on ZUJI sites in Asia Pacific during Q1 2005). Many travellers are opting, instead, for Bali.

## The rise and rise of e-tickets for flights

- During Q4 2004, 37% of international flight tickets bought on ZUJI were issued as e-tickets. During Q1 2005, the figure rises to 43%. This is a continued trend towards e-ticket adoption in all ZUJI market countries.

## The end of the 'tour', the start of 'stay-put' travel

- Most flight bookings made on ZUJI are for a week's travel (64%). Most hotel room nights are for stays a week or less (98%).
- This probably means travellers are spending less time actually traveling, and more time in the same place while away from home.

## Online payment for travel remains high, and steady

- More than 80% of trips booked on ZUJI in Q1 2005 were booked over the Internet, online, via ZUJI sites. This shows a high level of confidence in ZUJI, and trust in the security of the process, especially given the relatively high value of each travel transaction: A pat on the back for ZUJI, and a sign that consumers are now well and truly comfortable booking, and paying, online across Asia Pacific.

## Where to see and be seen in Q1 2005:

- The Top 5 most popular destinations for travellers during Q1 2004 were Bangkok, Thailand (1), Hong Kong (2), Jakarta, Indonesia (3), Kuala Lumpur, Malaysia (4), and London, United Kingdom (5).
- Taipei, Taiwan is now the most popular destination for Hong Kong travellers.
- Australians choose London over Auckland as their favourite destination. Previously the most favourite destination, Aussies have now decided that London, United Kingdom is their destination of choice.
- Despite the snub, New Zealanders keep coming back to Australia. The Top 3 international destinations for New Zealand travellers in Q1 2005 were Australian cities: Sydney, Melbourne and Perth.
- Singapore travellers choose Bangkok, Thailand as the number one destination in Q1 2005.

## **SECTION 2**

### **SPECIAL ANALYSIS**

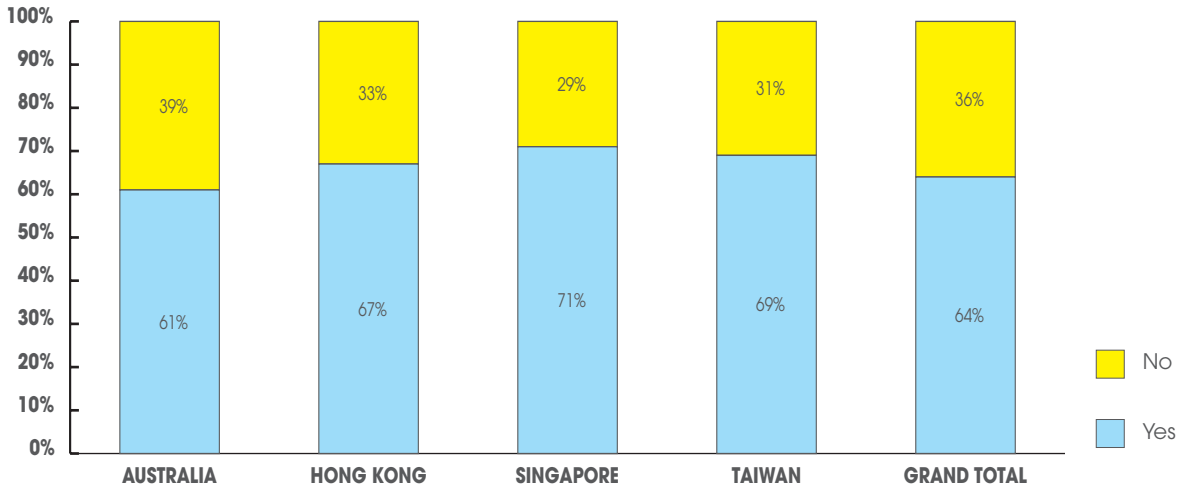
**- TSUNAMI IMPACT ON TRAVEL, AND CONSUMER INTENT TO TRAVEL**

# SPECIAL ANALYSIS

## - TSUNAMI IMPACT ON TRAVEL, CONSUMER INTENT TO TRAVEL

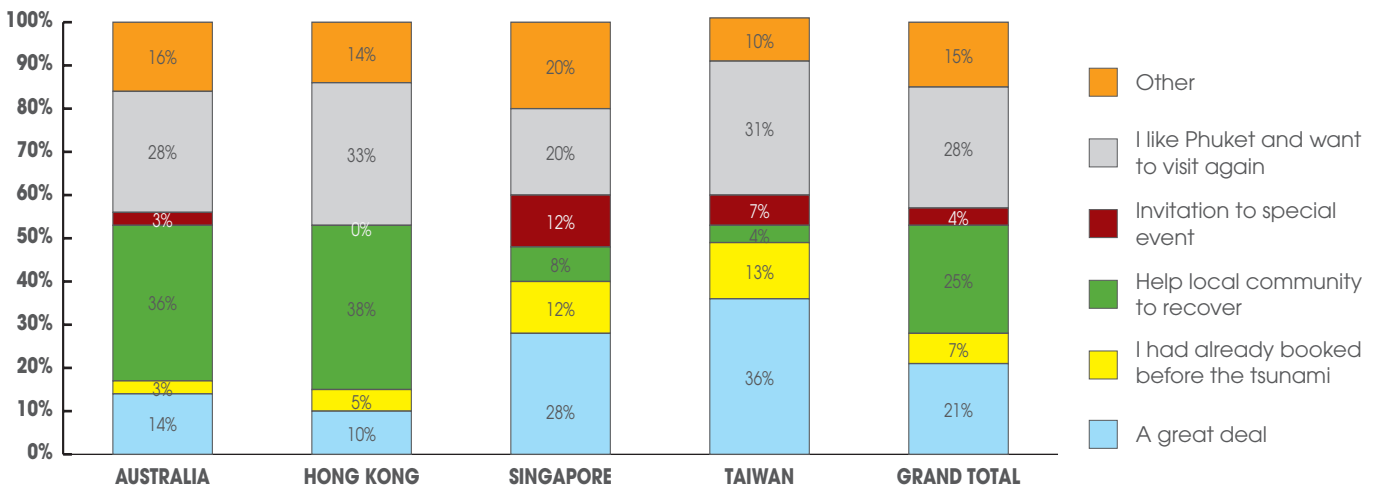
During Q1 2005, ZUII polled its member base across Asia Pacific to discover their travel plans to Phuket, Thailand post-tsunami. Findings follow:

**Q: Would you consider making / or have you made plans to visit Phuket in the next 12 months?**



- The majority of respondents indicated that they will, or would, go back to Phuket (64%).

**Q: If you have already decided to go to Phuket, what prompted you to go?**



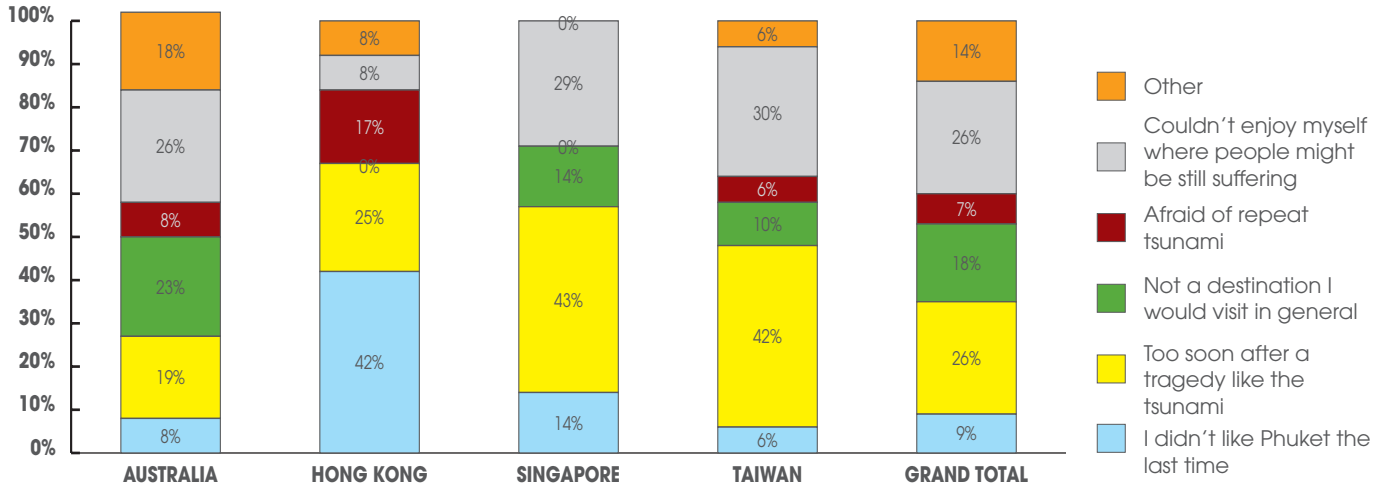
- The main reason cited is that people like Phuket in general (28%), want to help the community recover (25%) and because of great travel deals (21%).
- Australian and Hong Kong based respondents were much less deal driven, and rather more concerned to help the community recover (36%).
- Singapore and Taiwan consumers were more deal driven (28% and 36% respectively) compared to Australia and Hong Kong based respondents (14% and 10% respectively).



# SPECIAL ANALYSIS

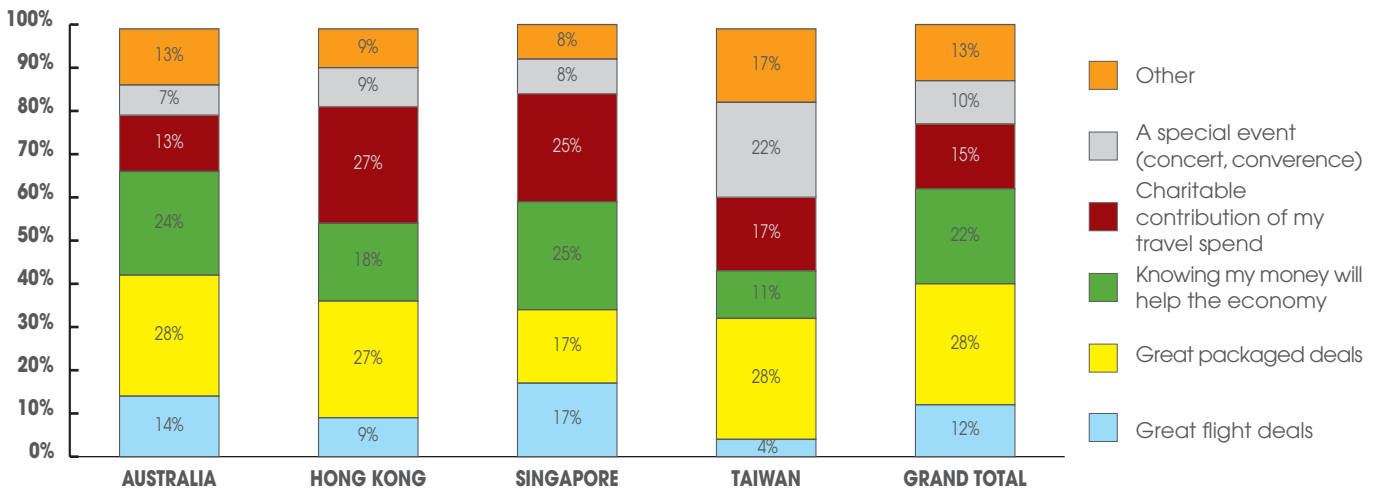
## - TSUNAMI IMPACT ON TRAVEL, CONSUMER INTENT TO TRAVEL

Q: Why don't you want to go / or plan to go to Phuket?



- Some people expressed a concern about spending their holidays in a location where a tragedy had occurred (52%) versus 27% who told ZUJI they either don't like Phuket or don't want to visit in general.
- Hong Kong consumers (17%) were scared of repeat tsunamis.

Q: What would make you change your mind to visit Phuket?



- Great travel deals are the main expressed driver to entice people to travel to Phuket. In particular, packaged deals. (40% of people told ZUJI they'd change their mind about going to Phuket for a great deal.)
- Charitable reasons are also high motivators to prompt a trip to Phuket.

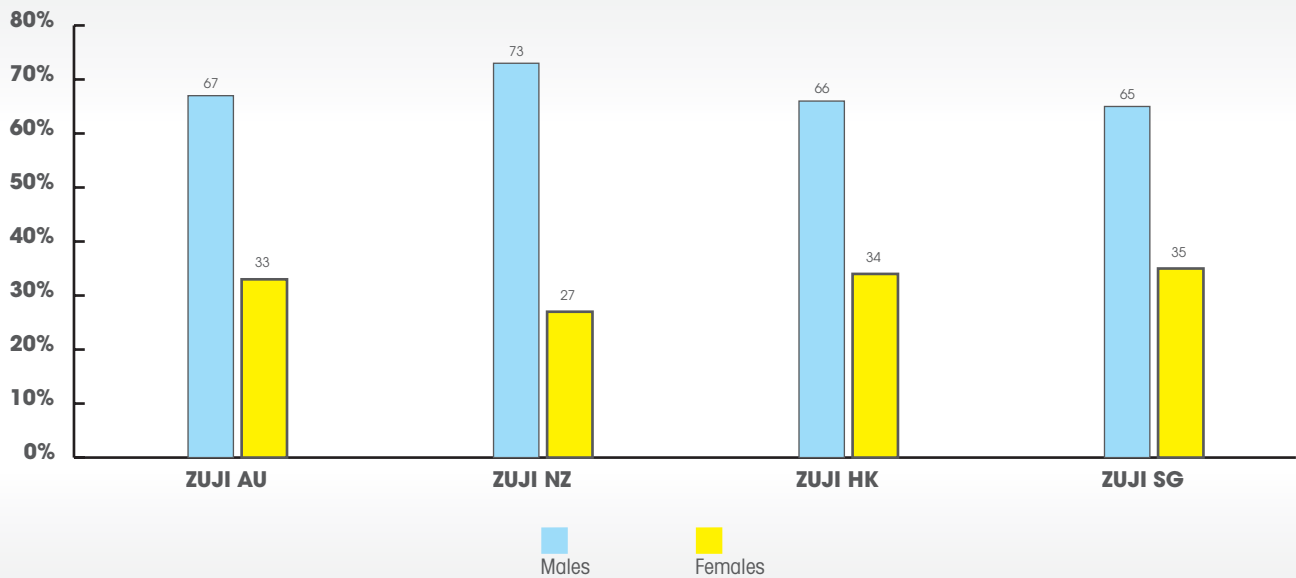


## **SECTION 3**

# **ONLINE CONSUMER INSIGHTS**

# ONLINE CONSUMER INSIGHTS

## Male / Female Bookers On ZUJI



### ZUJI Analysis

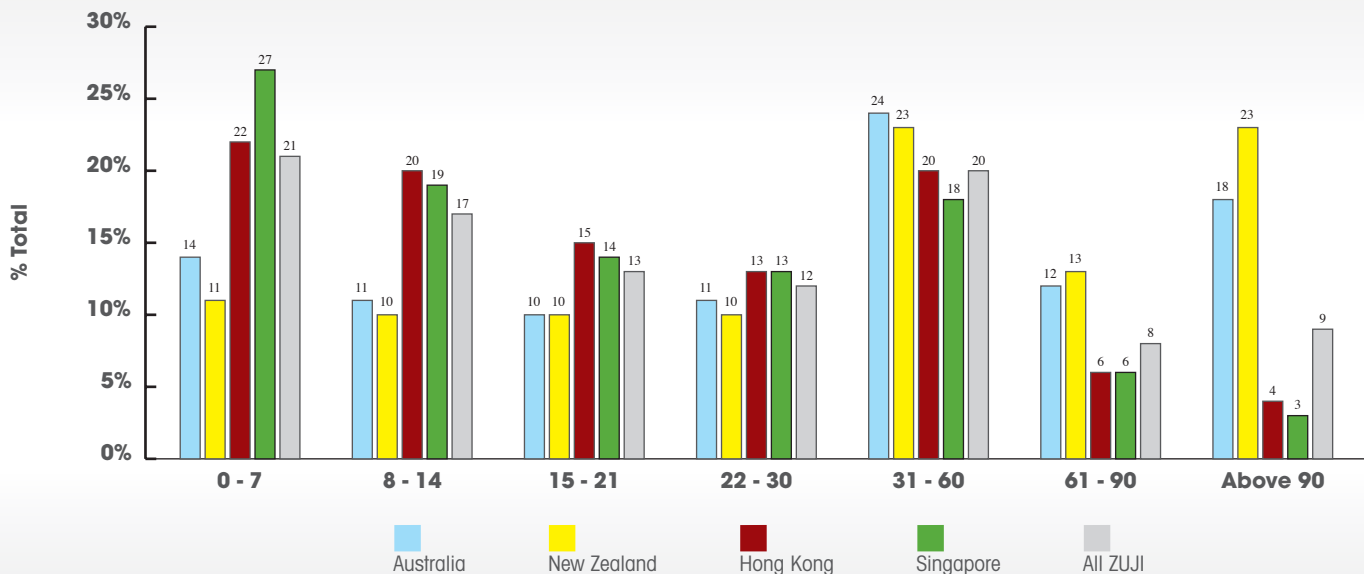
- More males than females book on ZUJI in general, and in every market.
- It's a commonly held idea that women are the traditional decisions makers for travel. But it's men who are booking and paying online for travel.

## **SECTION 4**

# **FLIGHT BOOKING TRENDS**

# Q1 FLIGHT BOOKING TRENDS

## Booking Lead Time: Flight Bookings

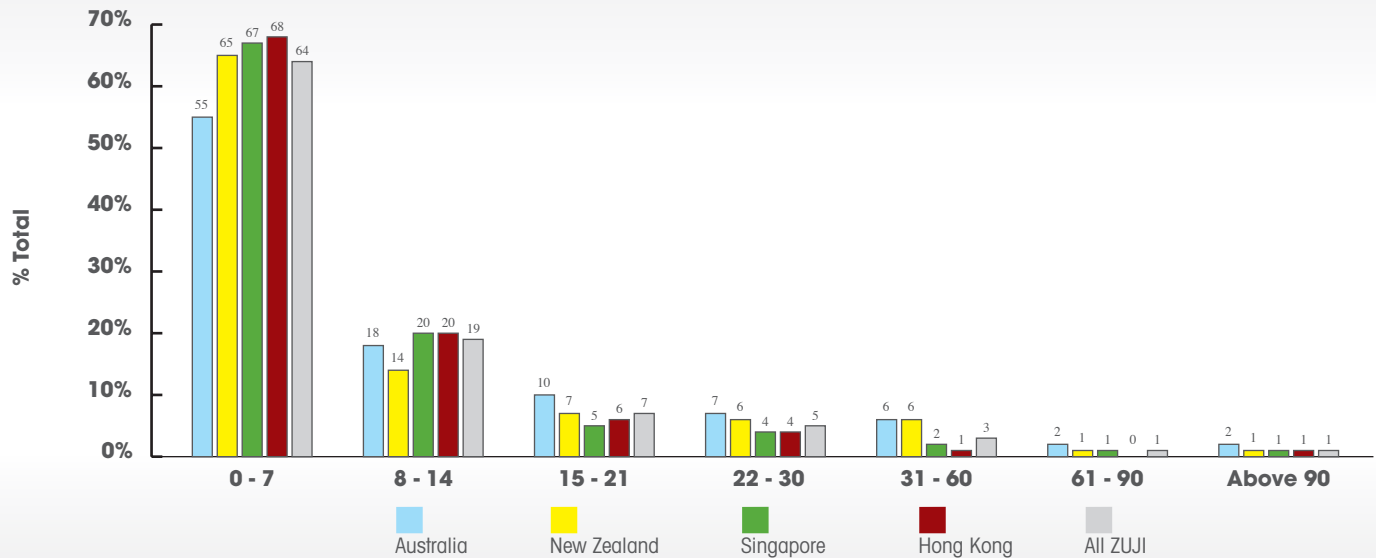


### ZUJI Analysis

- Australia and New Zealand based travellers prefer longer lead-time to book flights than Singapore and Hong Kong based travellers. 18% of Australian-based travellers, and 23% of New Zealand based travellers, book flights more than 90 days in advance. Only 4% of Singapore based travellers, and 3% of Hong Kong based travellers, book this far in advance.
- 58% of trips booked on ZUJI Hong Kong are made more than 14 days ahead of travel.
- 54% of trips booked on ZUJI Singapore are made more than 14 days ahead of travel.
- Overall, 62% of flights booked on ZUJI in Asia Pacific are booked more than 2 weeks ahead of travel as consumers avoid the 'last minute' approach to flight bookings in favour of early-bird bookings.

# Q1 FLIGHT BOOKING TRENDS

## Length Of Trips: Flight Bookings

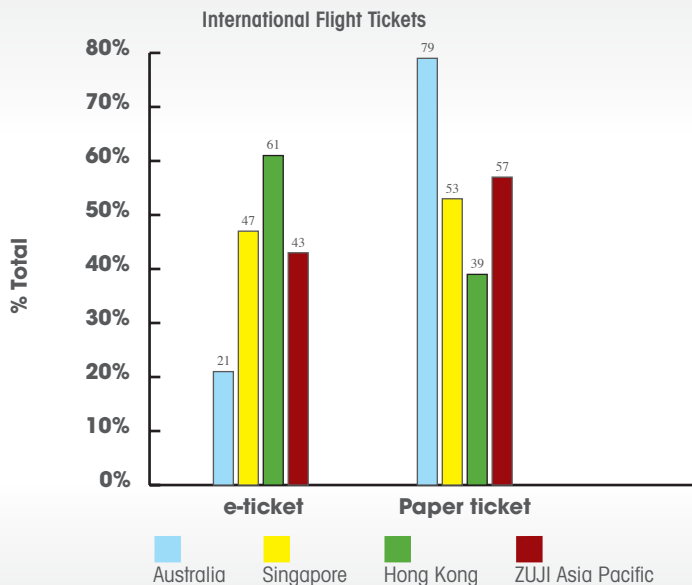


### ZUJI Analysis

- The one-week break is the most popular length holiday in 2005, with 64% of all trips booked on ZUJI lasting only a week.
- 83% of all trips booked on ZUJI are for a maximum of 2 weeks.

# Q1 FLIGHT BOOKING TRENDS

## “E-Tickets” Vs Paper Tickets For Flight Bookings

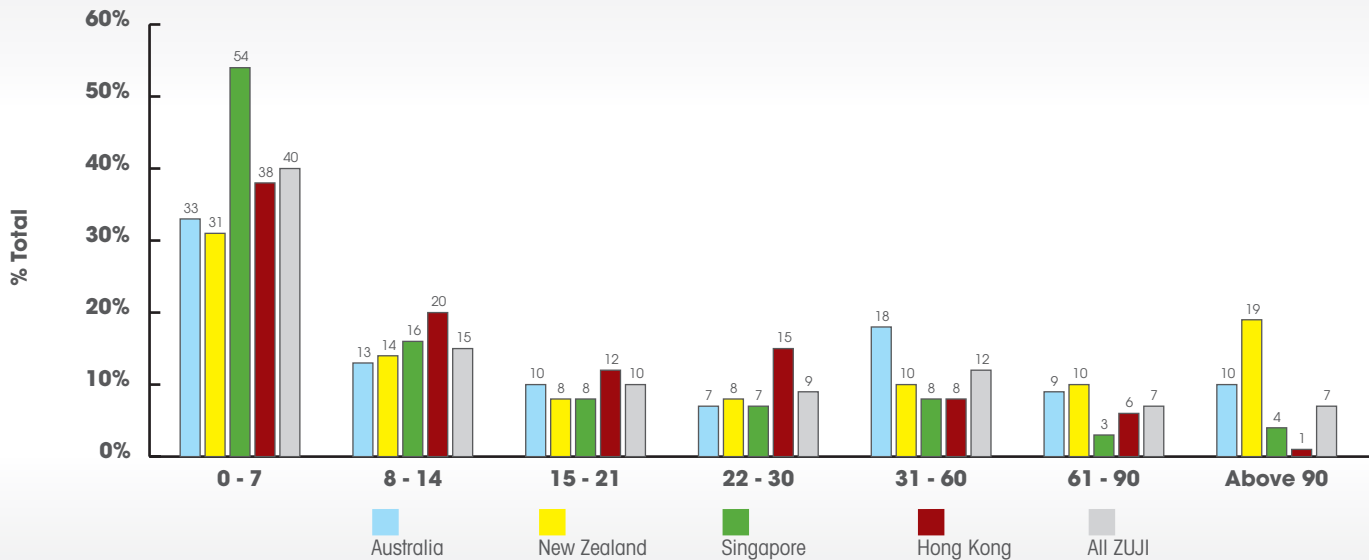


### ZUJI Analysis

- During Q4 2004, 37% of international flight tickets bought on ZUJI were issued as e-tickets. During Q1 2005, the figure rises to 43%. This is a continued trend to wards e-ticket adoption in all ZUJI market countries. (Note – 99% of all domestic tickets issued by ZUJI Australia are already issued as e-tickets.)
- Significantly, only 10% of international air tickets bought on ZUJI Australia in Q4 2004 were issued as e-tickets. During Q1 2005 the figures jumps dramatically to 21% as Aussies and airlines become more accepting of the e-ticket alternative.
- In Hong Kong, 61% of flight tickets issued by ZUJI were e-tickets (In Q4 2004, the figure was 40%).
- In Singapore, 47% of flight tickets issued by ZUJI were e-tickets (in Q4 2004, the figure was 49%). This is the only market to remain steady in terms of high e-ticket issue, while all other ZUJI country markets increased the percentage of e-ticket issuance in Q1 2005.

# Q1 HOTEL BOOKING TRENDS

## Booking Lead-Time: Hotel Bookings



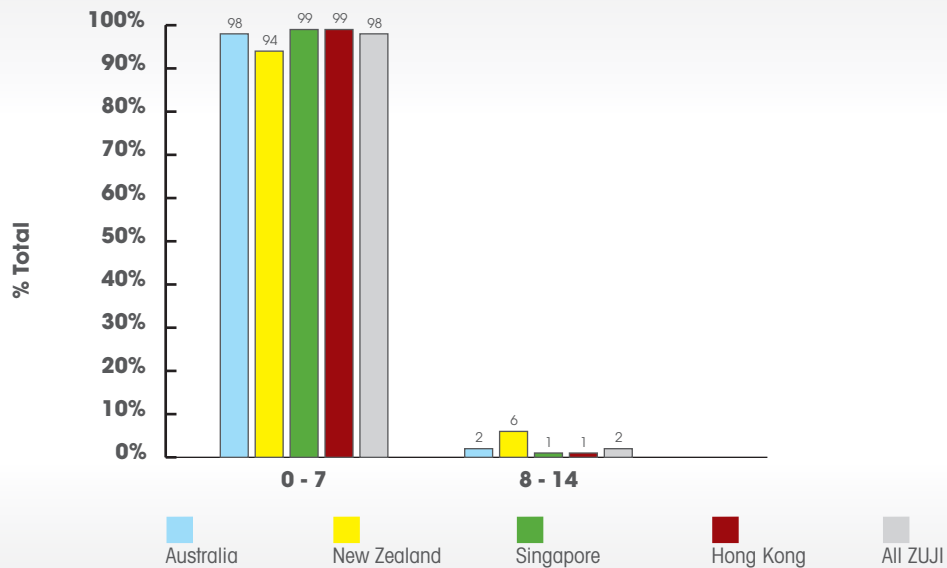
### ZUJI Analysis

- 55% of hotel bookings on ZUJI sites across Asia Pacific were made within two weeks of travel in Q1 2005. ZUJI predicts this trend will change this year as consumers begin to realise that waiting until the 'last minute' to book a hotel room is a somewhat outdated trend, especially for hotel rooms in high occupancy cities, and peak travel times of the year. ZUJI predicts 'early bird' bookings of 15 days+ per travel will emerge as the most popular time to book travel pre-trip by the end of 2005, as online agents and suppliers work to encourage longer-lead bookings, which are anticipated to result in competitive rates for hotels booked with longer lead times.
- ZUJI Australia and ZUJI New Zealand hotel booking trends are quite different to flight booking trends. In both cases, many travellers like to book flights in advance, but wait days or weeks to decide on a hotel.



# Q1 HOTEL BOOKING TRENDS

## Length Of Trip: Hotel Bookings

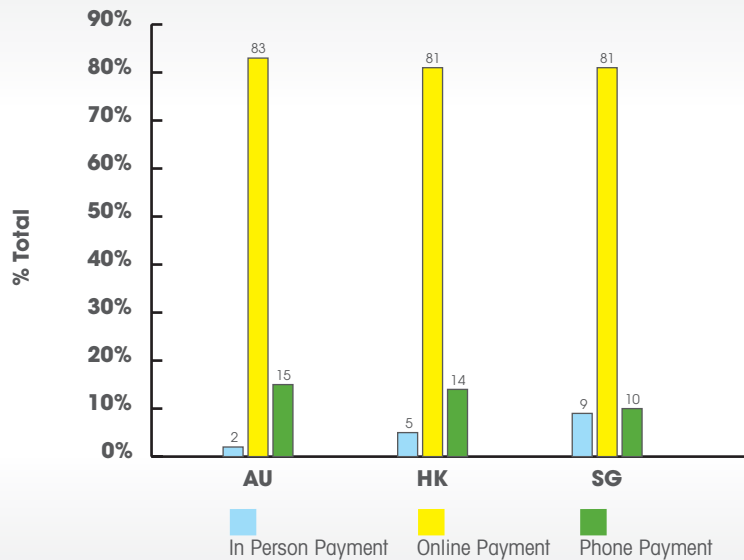


### ZUJI Analysis

- Just as most flight bookings made on ZUJI are for a week's travel, most hotel stays are booked for a week or less. This probably means travellers are spending less time actually traveling, and more time in the same place while away from home.

# Q1 HOTEL BOOKING TRENDS

## Online Payment Trends



### ZUJI Analysis

- More than 80% of trips booked on ZUJI are paid for online via ZUJI sites. This has remained steady for the past 12 months.
- Payment by phone remains the second most popular form of payment.

# Q1 TRENDS FOR TRAVEL BOOKED ONLINE

## Top International Destinations Booked On ZUJI Sites In Q1 2005

Rank	Destinations	Rank	Destinations
I	Bangkok Thailand	XI	Auckland, New Zealand
II	Hong Kong	XII	Los Angeles, USA
III	Jakarta, Indonesia	XIII	Melbourne, Australia
IV	Kuala Lumpur, Malaysia	XIV	Ho Chi Min City, Vietnam
V	London, UK	XV	Shanghai, China
VI	Singapore	XVI	Perth, Australia
VII	Sydney, Australia	XVII	Brisbane, Australia
VIII	Bali, Indonesia	XVIII	Manila, Philippines
IX	Taipei, Taiwan	XIX	Penang, Malaysia
X	Tokyo, Japan	XX	Beijing, China

### Post tsunami-Insights

Rank	Destinations
#24	Colombo, Sri Lanka (In Q2 2004, ranking was no. 10)
#44	Phuket, Thailand (In Q2 2004, ranking was no. 15)

### Shifts In Favourites:

- Colombo and Phuket fall from popularity in Q1 2005 post-tsunami. A return in popularity in Q2 2005 is predicted based on many ZUJI sites offering great travel deals to Phuket and/or Colombo to help affect a return to travel to these areas.
- Bali climbs to number 8 as travellers continue their return to Bali.
- Bangkok, Thailand returns to the number one destination, and Hong Kong slips back to number two position, where it spent most of 2004.

### Places You May Not Have Considered Visiting, But Other Travellers Booked On ZUJI In Q1 2005:

- Nadi, Fiji
- Toronto, Canada
- Cebu, Philippines
- Cork, Ireland
- Bombay, India
- Port Moresby, Papua New Guinea

# Q1 TRENDS FOR TRAVEL BOOKED ONLINE

## Top International Destinations For Australian Travellers In Q1 2005

Rank	Destinations	Rank	Destinations
I	London, UK	XI	Manila, Philippines
II	Auckland, New Zealand	XII	Vancouver, Canada
III	Singapore	XIII	Bali, Indonesia
IV	Hong Kong	XIV	San Francisco, USA
V	Kuala Lumpur, Malaysia	XV	Ho Chi Min, Vietnam
VI	Los Angeles, USA	XVI	Paris, France
VII	Bangkok, Thailand	XVII	Seoul, Korea
VIII	Christchurch, New Zealand	XVIII	Tokyo, Japan
IX	Nadi, Fiji	XIX	Wellington, New Zealand
X	Honolulu, Hawaii, USA	XX	Penang, China

### Post tsunami-Insights

Rank	Destinations
#39	Phuket, Thailand (In Q1 2004, ranking was no. 18)
#44	Colombo, Sri Lanka (previously not ranked within Top 50 destinations)

### Shifts In Favourites:

- Colombo, Sri Lanka ranks quite low in terms of historic popularity with Australian travellers, however, this is the first appearance of Colombo within the Top 50 Australian international destinations. This is significant as it shows that Aussies began to explore Sri Lanka post-tsunami.
- Phuket has had a huge fall from grace with Australian travellers post-tsunami. During Q1 2004, only one year ago, Phuket was the 18<sup>th</sup> most popular destination booked on ZUJI Australia.
- Bali returns to number 13 position as Australians continue to travel to Indonesia despite press coverage of alleged incidents involving Australians and drugs.
- Long haul, London is the most popular international flight booked on ZUJI, beating Auckland New Zealand to the top spot in Q1 2005.

### Places You May Not Have Considered Visiting, But Other Travellers Booked On ZUJI Australia In Q1 2005:

- Dublin, Ireland
- Vienna, Austria

# Q1 TRENDS FOR TRAVEL BOOKED ONLINE

## Top Domestic Destinations Booked On ZUJI Australia In Q1 2005

Rank	Destinations
I	Sydney, NSW
II	Melbourne, Vic
III	Brisbane, Qld
IV	Cairns, Qld
V	Perth, WA
VI	Adelaide, SA
VII	Canberra, ACT
VIII	Coolangatta, Qld
IX	Darwin, NT
X	Townsville, Qld

### Shifts In Favourites:

- Melbourne beats Brisbane to the number two spot for Australian domestic travellers in Q1 2005.
- Canberra gains its highest ever ranking of 7th most popular Australian destination booked on ZUJI Australia domestically.

# Q1 TRENDS FOR TRAVEL BOOKED ONLINE

## Top International Destinations For New Zealand Travellers In Q1 2005

Rank	Destinations	Rank	Destinations
I	Sydney, Australia	XI	Hong Kong
II	Melbourne, Australia	XII	Vancouver, Canada
III	Brisbane, Australia	XIII	Amsterdam, Netherlands
IV	London, UK	XIV	Frankfurt, Germany
V	Los Angeles, USA	XV	Beijing, China
VI	Nadi, Fiji	XVI	Bombay, India
VII	Bangkok, Thailand	XVII	Cairns, Australia
VIII	Singapore	XVIII	Manchester, UK
IX	Paris, France	XIX	Manila, Philippines
X	Perth, Australia	XX	Kuala Lumpur, Malaysia

### Post tsunami-Insights

Rank	Destinations
#22	Colombo, Sri Lanka (In Q4 2004, ranking was no. 40) Phuket, Thailand is not currently a Top 50 destination booked on ZUJI New Zealand

### Shifts In Favourites:

- The cross-Tasman run remains the most popular flight for New Zealanders booking on ZUJI, with Sydney, Melbourne and Brisbane taking the top 3 spots.
- Long haul, New Zealand travellers are opting for London, Los Angeles and Paris as the three most popular long haul destinations.
- Favourite Asian destinations for New Zealand travellers during Q1 2005 include Bangkok, Singapore and Hong Kong.
- Fiji remains a favourite for Kiwis, with arrivals to Nadi in 6th position, up from 11th spot in Q4 2004.
- Post-tsunami, New Zealand travellers are beginning to explore Sri Lanka, with Colombo currently the 22nd most popular destination booked on ZUJI New Zealand. In Q4 2004, it was ranked at number 40.

### Places You May Not Have Considered Visiting, But Other Travellers Booked On ZUJI New Zealand In Q1 2005:

- Minsk, Belarus (Europe)
- Bangalore, India
- Durban, South Africa

# Q1 TRENDS FOR TRAVEL BOOKED ONLINE

## Top Domestic Destinations Booked On ZUJI New Zealand In Q1 2005

Rank	Destinations
I	Auckland
II	Christchurch
III	Wellington
IV	Queenstown
V	Dunedin
VI	Invercargill
VII	Blenheim
VIII	Napier, Hawkes Bay
IX	Palmerston North
X	Rotorua

### Shifts In Favourites:

- Auckland tips Christchurch from its number one position in Q4 2004, to number two in Q1 2005.
- Invercargill rises from 12th most popular spot (in Q4 2004) to 6th most popular destination in Q1 2005.



# Q1 TRENDS FOR TRAVEL BOOKED ONLINE

## Top International Destinations For Singapore Travellers In Q1 2005

Rank	Destinations	Rank	Destinations
I	Bangkok, Thailand	XI	Penang, Malaysia
II	Hong Kong	XII	Colombo, Sri Lanka
III	Jakarta, Indonesia	XIII	Melbourne, Australia
IV	Kuala Lumpur, Malaysia	XIV	Beijing, China
V	Bali, Indonesia	XV	Manila, Philippines
VI	Sydney, Australia	XVI	Medan, Indonesia
VII	Tokyo, Japan	XVII	Taipei, Taiwan
VIII	Perth, Australia	XVIII	Los Angeles, USA
IX	Shanghai, China	XIX	San Francisco, USA
X	London, UK	XX	Guangzhou, China

### Post tsunami-Insights

Rank	Destinations
#32	Phuket, Thailand (In Q1 2004, ranking was no. 6)

### Shifts In Favourites:

- Phuket falls from grace with Singapore travellers in Q1 2005, post-tsunami, and is now ranked at number 32. To put this in context, only a year ago, in Q1 2004, Phuket was the 6th most popular destination booked on ZUJI Singapore.
- Phuket falls from grace with Singapore travellers in Q1 2005 post-tsunami, now ranked at number 32. To put this in context, only a year ago, in Q1 2004, Phuket was the 6th most popular destination booked on ZUJI Singapore.
- Bangkok returns to the number one position in Q1 2005, tipping Hong Kong into the number two position.
- Bali remains a Top 5 destination booked on ZUJI Singapore.

### Places You May Not Have Considered Visiting, But Other Travellers Booked On ZUJI Singapore In Q1 2005:

- Surabaya, Indonesia
- Rome, Italy
- Madras, India
- Chiang Mai, Thailand

# Q1 TRENDS FOR TRAVEL BOOKED ONLINE

## Top International Destinations For Hong Kong Travellers In Q1 2005

Rank	Destinations	Rank	Destinations
I	Taipei, Taiwan	XI	Vancouver, Canada
II	Bangkok, Thailand	XII	Kaohsiung, Taiwan
III	Singapore	XIII	Shanghai, China
IV	Tokyo, Japan	XIV	San Francisco, USA
V	London, UK	XV	Jakarta, Indonesia
VI	Manila, Philippines	XVI	New York, USA
VII	Sydney, Australia	XVII	Brisbane, Australia
VIII	Los Angeles, USA	XVIII	Seoul, Korea
IX	Kuala Lumpur, Malaysia	XIX	Bali, Indonesia
X	Beijing, China	XX	Chongqing, China

### Shifts In Favourites:

- For the first time, Taipei, Taiwan takes top position as the number one destination booked on ZUJI Hong Kong.
- Beijing enters the Top 10 most popular destinations for the first time in Q1 2005, at 10th position.
- Singapore remains the to third most popular destination, as it was in Q4 2004.
- Los Angeles jumps two places from number 10 (Q4 2004) to number 8 positions in Q1 2005.
- Post-tsunami, neither Phuket, Thailand or Colombo, Sri Lanka appear in the Top 50 most popular destinations booked on ZUJI Hong Kong.

### Places You May Not Have Considered Visiting, But Other Travellers Booked On ZUJI Hong Kong In Q1 2005:

- Hanover, Germany
- Xiamen, China
- Delhi, India
- Christchurch, New Zealand

# ABOUT ZUJI

ZUJI is uniquely placed to provide online booking trends and data insights on a country-specific and Asia Pacific Regional basis.

ZUJI is a joint venture of 15 leading airlines operating in Asia-Pacific, and Travelocity, an international leader in online travel.

The airlines are: All Nippon Airways, Cathay Pacific Airways, China Airlines, EVA Airways, Garuda Indonesia, Hong Kong Dragon Airlines, Japan Airlines, Malaysia Airlines, Northwest Airlines, Philippine Airlines, Qantas Airways, Royal Brunei Airlines, SilkAir, Singapore Airlines and United Airlines.

ZUJI's online travel booking technology, regional and international reach is unrivaled across Asia Pacific. It is the most comprehensive online travel company in Asia Pacific, enabling travellers to create their own journeys online. ZUJI accesses reservation systems to provide travellers with a comprehensive range of travel products which include more than 400 airlines, 56,000 hotels, 50 car hire companies and more than 3,000 activities and attractions.

ZUJI headquarters is located in Singapore, and ZUJI is a licensed travel agent and operates teams and travel websites in:

- Singapore: [www.zuji.com.sg](http://www.zuji.com.sg) (English language)
- Hong Kong: [www.zuji.com.hk](http://www.zuji.com.hk) (English and Chinese language)
- Taiwan: [www.zuji.com.tw](http://www.zuji.com.tw) (Chinese language)
- Australia: [www.zuji.com.au](http://www.zuji.com.au) (English language)
- Korea: [www.nexttour.co.kr](http://www.nexttour.co.kr) (Korean language / under brand name "Nextour")
- ZUJI's Headquarters are located in Singapore.

## ZUJI Partner Network

ZUJI has introduced a 'Partner Network' program for activating ZUJI sites or offering white label elements to third parties. ZUJI New Zealand is a ZUJI Travel Partner Network initiative, and ZUJI New Zealand launched in October 2004 ([www.zuji.co.nz](http://www.zuji.co.nz)).

ZUJI works to a low-touch, large-scale business model and leverages its core site technology across multiple markets to reach many millions of potential travellers.

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