

Hitwise Industry Report for Travel - Agencies

Based on New Zealand Internet usage
for the week ending January 23, 2010



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About Hitwise

Hitwise is the leading online competitive intelligence service. Only Hitwise provides its 1,500 global clients with daily insights on how their customers interact with a broad range of competitive websites, and how their competitors use different tactics to attract online customers.

Since 1997, Hitwise has pioneered a unique, network-based approach to Internet measurement. Through relationships with ISPs around the world, Hitwise's patented methodology captures the anonymous online usage, search, and conversion behavior of 25 million Internet users. This unprecedented volume of Internet usage data is seamlessly integrated into our easy to use, web-based service, designed to help marketers better plan, implement, and report on a range of online marketing programs.

Hitwise, a subsidiary of Experian (FTS: EXPN) www.experiangroup.com and operates in the United States, United Kingdom, Australia, New Zealand, Hong Kong, and Singapore. More information about Hitwise is available at www.hitwise.com/nz.

For up to date analysis of online trends and statistics, please visit the Hitwise Intelligence Analyst Weblogs at weblogs.hitwise.com and the Hitwise Data Center at www.hitwise.com/nz/resources/data-center/.

About Hitwise Industry Reports

This Hitwise Industry Report provides a concise analysis of market trends within the online 'Travel - Agencies' industry. Hitwise monitored 1,090 websites in the 'Travel - Agencies' industry for the week ending 23/01/2010. The industry report includes analysis of traffic levels across days, traffic distribution across the category, traffic to international websites within the category, rankings of the key players within the industry and a range of other key insights into the 'Travel - Agencies' industry. This type of report is available across any one of the industries monitored by Hitwise.

This report is based on a sample of Internet traffic within the New Zealand market. It does not include traffic a website or industry may generate from overseas visitors. This report should not be compared with site-centric statistics due to significant differences in data collection methods. For more information on the Hitwise methodology please visit www.hitwise.com/nz.

Hitwise Methodology

Hitwise monitors a range of Internet Service Provider (ISP) networks to capture the usage patterns of Internet users. The ISPs represent a diverse range of metropolitan and regional areas including Internet access from home, work and educational institutions.

Each day, Hitwise extracts from its partner ISP networks a list of websites visited and ranks them according to a range of industry standard metrics - including 'Visits', 'Pages' and 'Average Visit Time'. Hitwise also extracts Clickstream data which analyzes the movements of visitors between websites.

Hitwise abides by local and international privacy legislation and analyzes all data in aggregate form. The Hitwise methodology is audited by PricewaterhouseCoopers on a quarterly basis. To view the Hitwise privacy policy and methodology in full please visit www.hitwise.com/nz.



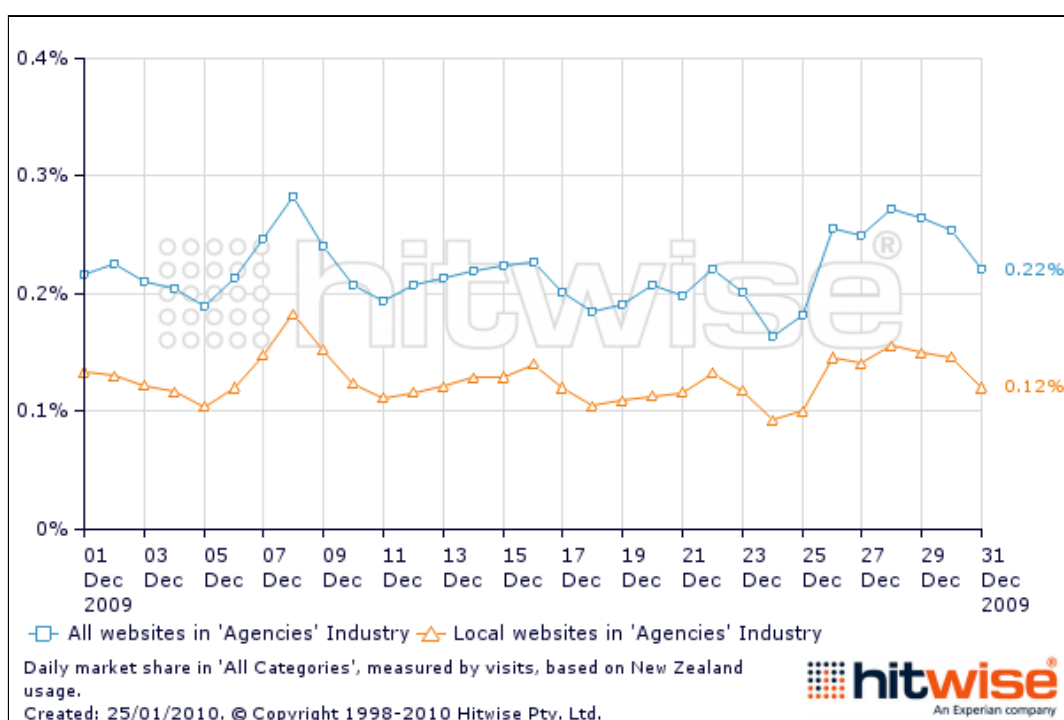
Industry Description

Travel - Agencies

This category contains websites that provide third-party bookings for travel services, such as package holidays, flights, and tours. The category also includes the websites of offline travel agencies and tour operators, as well as publishers of travel deals and travel price comparison sites. It does not include sites which focus exclusively on accommodation bookings.

Traffic Analysis

The chart below represents the market share of all websites in the 'Travel - Agencies' industry out of all Internet traffic, compared to the market share of local websites only. Of all Internet traffic to the 'All Categories' industry during the month of December, 2009, all websites in the 'Travel - Agencies' industry captured an average of 0.22% of visits, while local websites in the 'Travel - Agencies' industry received 0.13% of visits. Local websites contributed 58.09% of all traffic to the 'Travel - Agencies' industry, which means New Zealand Internet users prefer local to global websites.



Traffic Distribution Analysis

58.97% of all visits to the online 'Travel - Agencies' industry went to the top 10 websites for the week ending 23/01/2010. 68.94% went to the top 20 websites and 89.27% went to the top 100 websites.

Visit Duration Analysis

The average visit duration for visits to the online 'Travel - Agencies' industry was 7 minutes, 48 seconds for the week ending 23/01/2010. This is a minimal increase from last weeks average visit duration of 7 minutes, 46 seconds.

Websites That Entered and Left the Top 100

The weekly churn in the Top 100 in the 'Travel - Agencies' industry for the week ending 23/01/2010 based on visits was 8.0%, which means that 8 websites in this industry's Top 100 rankings have changed since 16/01/2010.

Websites that entered the Top 100 were:

16/01/2010 Rank	23/01/2010 Rank	Website	Domain
109	71	Sportsnet Holidays	www.sportsnetholidays.com
102	76	GAP Adventures	www.gapadventures.com
DNR	81	51766.com	www.51766.com
105	83	Planet Earth Travel	www.planettravel.co.nz
DNR	85	Illicotravel	www.illicotravel.com
101	91	Breakaway New Zealand	www.breakaway.co.nz
119	93	TUIfly.com	www.tuifly.com
112	100	iexplore	www.iexplore.com

Websites that have left the Top 100 were:

16/01/2010 Rank	23/01/2010 Rank	Website	Domain
58	102	Travelzoo Australia	www.travelzoo.com.au
71	DNR	flights.ctrip.com	flights.ctrip.com
82	106	OctopusTravel Singapore	www.octopustravel.com.sg
88	128	STA Travel UK	www.statravel.co.uk
93	101	Student Flights	www.studentflights.com.au
94	122	World Interline Tours - NZ	www.easyway.co.nz
95	104	ebookers.com	www.ebookers.com
98	107	Last Night Of Freedom	www.lastnightoffreedom.co.uk

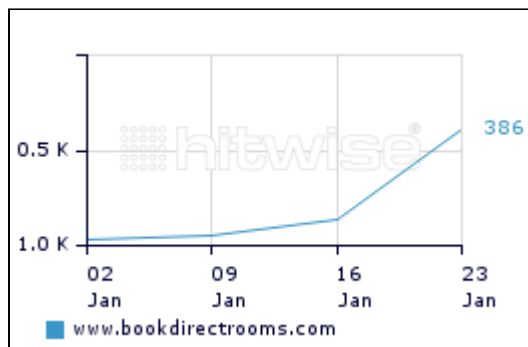
* Note: DNR = Did Not Rank

Fast Movers

Fast Movers indicates websites which have witnessed substantial increases in rank in the 'Travel - Agencies' online industry. Charts show rank in the 'Travel - Agencies' online industry for the four weeks ending 23/01/2010.

Book Direct Rooms

<http://www.bookdirectrooms.com/>

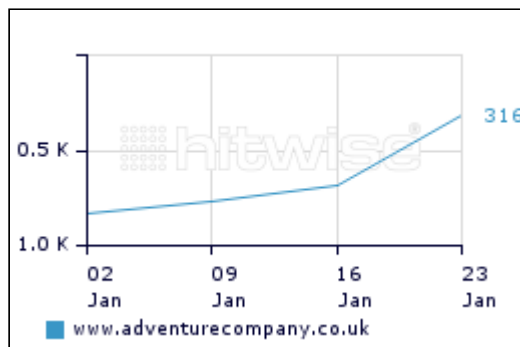


▲ 481 places

Book Direct Rooms allows users to search for and book online UK accommodations.

Adventure Company

<http://www.adventurecompany.co.uk/>

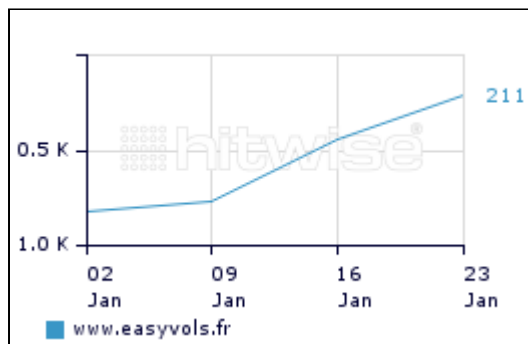


▲ 369 places

The Adventure Company offers adventure trips and holidays, their website features information on their range of trips and destinations.

Easy Vols

<http://www.easyvols.fr/>

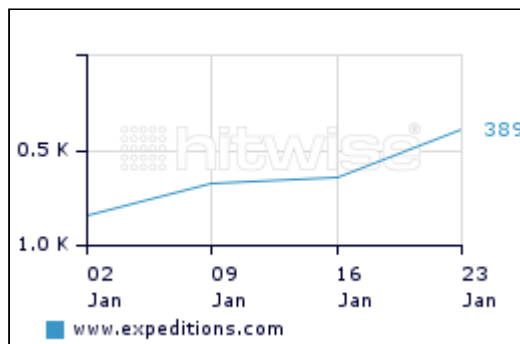


▲ 227 places

No description

Expeditions.com

<http://www.expeditions.com/>



▲ 254 places

No description

Top 30 Websites - By Visits

The table below shows the Top 30 websites in the 'Travel - Agencies' online industry for the week ending 23/01/2010 based on visits.

This category contains websites that provide third-party bookings for travel services, such as package holidays, flights, and tours. The category also includes the websites of offline travel agencies and tour operators, as well as publishers of travel deals and travel price comparison sites. It does not include sites which focus exclusively on accommodation bookings.

Total websites that ranked with currently selected options: 1,090

Category Contribution Percentage: 0.27%

Rank	Website	Domain	Market Share	16/01	09/01	02/01
1.	House of Travel	www.houseoftravel.co.nz	16.84%	1	1	1
2.	Flight Centre New Zealand	www.flightcentre.co.nz	11.75%	2	2	2
3.	Webjet New Zealand	www.webjet.co.nz	9.43%	3	3	4
4.	Expedia.co.nz	www.expedia.co.nz	8.40%	4	4	3
5.	Expedia	www.expedia.com	4.34%	5	5	5
△	6. Webjet Australia	www.webjet.com.au	1.94%	7	6	6
△	7. Jet Abroad - NZ	www.jetabroad.co.nz	1.91%	10	8	7
△	8. Orbitz	www.orbitz.com	1.50%	12	12	12
	9. CheapFlightsOnline.com.au	www.cheapflightsonline.com.au	1.50%	9	10	8
▽	10. STA Travel NZ	www.statravel.co.nz	1.35%	8	9	11
△	11. Lastminute.com.au	www.lastminute.com.au	1.33%	13	11	9
△	12. Lowfares.com	www.lowfares.com	1.15%	15	16	18
△	13. Fare Compare	www.farecompare.com	1.13%	14	14	13
▽	14. Harvey World Travel New Zealand	www.harveyworld.co.nz	1.09%	11	7	10
△	15. Kayak	www.kayak.com	1.04%	17	18	16
	16. Flight Centre	www.flightcentre.com.au	1.01%	16	15	19
▽	17. United Travel	www.unitedtravel.co.nz	0.98%	6	13	14
△	18. lastminute.com	www.lastminute.com	0.78%	24	47	40
	19. Yahoo! Travel	travel.yahoo.com	0.73%	19	22	17
△	20. Travelocity	www.travelocity.com	0.72%	21	21	25
△	21. skyscanner	www.skyscanner.net	0.72%	22	26	20
△	22. Cheap Flights Australia and NZ	www.cheapflights.com.au	0.66%	28	23	24
	23. Airfares Flights Australia	www.airfaresflights.com.au	0.63%	23	20	22
△	24. Itchy Feet	www.itchyfeet.co.nz	0.62%	25	24	37
△	25. cheapoair.com	www.cheapoair.com	0.60%	27	34	46
△	26. Go Holidays	www.goholidays.co.nz	0.51%	31	30	32
▽	27. Intrepid Travel	www.intrepidtravel.com	0.51%	20	17	29
△	28. Ctrip.com	www.ctrip.com	0.47%	33	32	28
△	29. eDreams	www.edreams.com	0.46%	34	33	38
▽	30. zuji	www.zuji.com	0.44%	29	27	27

Note: DNR = Did Not Rank

Industry Search Terms

The following report lists the most popular search terms for the **24 weeks** ending **23/01/2010**, that resulted in traffic to websites classified by Hitwise within the **'Travel - Agencies'** industry. For example, the most popular search term was **'house of travel'** representing **6.88%** of all search terms that delivered users to websites classified by Hitwise within the **'Travel - Agencies'** industry.

Displaying 1 to 30 of 49,949 search terms.

Rank	Search Term	Clicks
1.	house of travel	6.88%
2.	flight centre	3.31%
3.	cheap flights	2.41%
4.	flight centre nz	1.94%
5.	house of travel nz	1.29%
6.	jetstar nz	1.07%
7.	grab a seat	0.87%
8.	webjet	0.83%
9.	expedia	0.79%
10.	expedia.co.nz	0.69%
11.	cheap flights nz	0.65%
12.	air new zealand	0.59%
13.	cheap flights to australia	0.55%
14.	flights	0.52%
15.	sta travel	0.52%
16.	flight center	0.51%
17.	jetstar	0.48%
18.	webjet nz	0.44%
19.	jet star	0.42%
20.	united travel	0.37%
21.	harvey world travel	0.34%
22.	cheap airfares	0.32%
23.	houseoftravel	0.29%
24.	flightcentre	0.23%
25.	travel agents	0.23%
26.	emirates	0.22%
27.	www.houseoftravel.co.nz	0.22%
28.	air new zealand grab a seat	0.22%
29.	jetabroad	0.21%
30.	pacific blue	0.20%

Report Glossary

All Categories: All Categories is an industry that contains all of the websites categorized in the Hitwise database, excluding websites in the Adult, Internet Service Providers (ISPs), and Ad Server industries. All Categories also temporarily contains websites that Hitwise has not yet categorized into a sub-category and/or parent category

All Sites: The collection of all Local and International Sites, as visited by local Internet users in all Hitwise industries except Adult, ISPs and Ad Servers.

Average Visit Time: The elapsed time from the first to the last page request that constitutes a visit, adding the average time per page for such a visit.

Churn: The movement of top ranking websites within an industry.

Clickstream: Hitwise Clickstream data shows the proportion of traffic that comes from (upstream) and goes to (downstream) the subject website, industry, or custom category.

Demographic Variable: An aggregate term used to refer to age, gender, household income, or region (state).

Domain: The unique name that forms the basis of a URL, such as www.yahoo.com.

Downstream: Downstream websites or industries are those visited immediately after leaving the subject website.

Fast Mover: The set of websites in a specific industry that have increased in rank based on visits, ordered by the increase in rank over the last period.

Index: An index value indicates strength or weakness in comparison to an average.

Industry: Websites that Hitwise has grouped for analysis as a vertical market sector, based on subjective matter, content, market orientation and competitive context.

Industry Clickstream: Clickstream data that shows the proportion of traffic that comes from (upstream) and goes down to (downstream) the subject industry or custom category.

Keyword: One word entered into a search engine. For example: 'car', 'engine', 'motor'.

Local Site: The collection of websites that are categorized as published in the local market, ie Australian sites in Hitwise AU, UK sites in Hitwise UK, etc.

Market Share: The percentage of all traffic to a particular online industry category that is received by an individual website.

MOSAIC™ Group: Behavioral segments, as defined by MOSAIC™ from Experian. They are used by the Hitwise Lifestyle tool in the Hitwise Australia and United Kingdom services. MOSAIC groups are based on multiple characteristics, including religion, ancestry, and language.

MOSAIC Type: Behavioral segments broken out from MOSAIC™ groups. MOSAIC™ types are based on multiple characteristics, including religion, ancestry, and language.

Organic Traffic: Traffic to a website from search engines that are not part of a pay-per-click (PPC) advertising campaign.

Report Glossary (continued)

Page Impression: A measurement of responses from a Web server to a page request from the user's browser.

Page Request: An opportunity for an HTML document to be displayed within a browser window. Hitwise does not count un-requested pop-ups served from the same domain, or panels or frames that make up a page. Hitwise counts a page request once regardless of the number of frames making up the page. Hitwise currently does not count those page requests that emanate from the browser cache.

Paid Traffic: Traffic to a website from search engines that are part of a pay-per-click (PPC) advertising campaign.

PRIZM NE Lifestage: A collection of PRIZM NE behavioral segments grouped by life stage (age and presence of children in the home). They are used in the Hitwise Lifestyle tool (Hitwise US service only).

PRIZM NE Segment: Behavioral segments, as defined by PRIZM NE. They are used in the Hitwise Lifestyle tool (Hitwise US service only). PRIZM NE segments are based on multiple characteristics, including education, occupation, and marital status.

PRIZM NE Social Group: A collection of PRIZM NE behavioral segments, grouped by social group (population density of the areas in which people live). They are used in the Hitwise Lifestyle tool (Hitwise US service only).

Representation: A method of comparing two groups or audience, and expressing the difference between the two as an index.

Search Engine: An online service that assists users to search and find information on the Internet. Popular search engines include Google, Yahoo! Search, MSN Search (Live.com) and Ask.com.

Search Term: Multiple keywords entered into a search engine. For example, 'toyota used car'.

Session: See Visit.

Social Grade: A behavioral segment as defined by MOSAIC™ from Experian. Social Grade is provided by the Hitwise Lifestyle tool in the Hitwise UK service. Social Grade is based on ABC1 demographics, which provide an indication of the occupation of the chief income earner within a household.

Social Group: A sub-group of a behavioral segment known as a 'PRIZM NE Segment'. They are used by the Hitwise Lifestyle tool in the Hitwise US service. Social Groups are based on population density.

Swing Comparison: A method of comparing two groups or audience, and expressing the difference in percentage between the two.

Traffic: Website activity. The type of activity measured depends on the report. For example, visits from a set of search terms (Website Search Terms report), or visits from a custom category (Rankings report).

Traffic Share: Activity on a website or industry by a particular group, expressed as a percentage of the total activity to that website or industry.

Upstream: Websites or industries that users visited immediately prior to the subject website or industry.

Visit: A series of one or more page requests by a visitor without 30 consecutive minutes of inactivity.

Website: A distinct set of URLs that make up a particular content offering.