

# ***FAST TIMES AHEAD IN ONLINE TRAVEL***



A collection of the best in online travel marketing facts, trends and forecasts from around the world that you can't afford to miss.

Edited by Rob Hartnett

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## Introduction

In the early years the internet was seen as revenue nirvana for all manner of businesses, from film to online shopping malls and everything in between. However like many gold rushes the real money was initially made by those selling services to the online players. Such as lawyers, advertising agencies and information technology companies.

However over the last few years while everyone was focusing on the revenue that could be made a quite user led revolution was taking place. A social change if you will that is having and will continue to have a dramatic effect into the future. Today we have the on demand generation. Those who know they can learn and even buy almost anything they want, when they want, from whom they want and they will pay in the method that suits them.

During this quite revolution several industries have come under more scrutiny than others and have benefited directly or been affected directly depending how prepared they were. These industries are real estate, automotive, financial services and travel.

The travel industry be it from a business to business or business to consumer view has seen the impact of this online movement. From the way consumers research an international trip to the way small and large business book their flights directly online with the airline.

Keeping up with what is happening in your industry is difficult when so often we are caught up in the day to day management.

To that end I have compiled some research from across the globe that I believe is relevant to those in the travel and tourism business and especially those with an eye on overseas markets.

This is deliberately set out to be a quick read or to act as a reference. It is not a "how to" publication. It is meant to inform and clarify where others may have just confused.

Enjoy, but most importantly implement!

Rob Hartnett

## Global Internet Facts

### World usage patterns & demographics

- The Global Internet population continues to experience strong growth with a 19% annual growth rate driven by Japan and the US, according to Ipsos-Insight's latest The Face Of The Web Internet Trends Study.

In the race toward Internet adoption, Japan was the clear leader in 2004, with more than 8 out of 10 households using the Internet. Meanwhile, the US broke through a two-year plateau with an annual growth rate of 27%. In line with Ipsos-Insight's projection, growth in Internet usage in 2004 was primarily driven by Japan and the US. Among the 12 markets measured:

- The US still accounts for the largest Internet market with 162 million users, or 42% of the Internet population in measured markets.
- Japan follows, with close to 70 million users.
- Much of the remainder of the growth was contributed by France and urban markets of China and Russia, with the latter two demonstrating the strongest, while still consisting only of close to 10 million online users each, (each has an annual growth rate of over 50%).

The annual study of Internet trends by Ipsos-Insight has been tracking global Internet developments since 1999. The latest findings are based on interviews in 12 key global markets with more than 6,500 adults, including 3,304 active Internet users. ([Ipsos-Insight](#), January 2005)

- According to statistics updated in December 2004 by Internet World Stats, there are currently an estimated 812,931,592 Internet users worldwide (representing about 12.7% of the population worldwide) including:
  - In Asia: 257,898,314 (or 7.1% of the population in the region and about 31.7% of the total online population)
  - In North America: 222,165,659 (68.3% of the population in the region and about 27.3% of the total online population)
  - In Europe: 230,886,424 (31.6% of the population in the region and about 28.4% of the total online population)
  - In Latin America/Caribbean: 55,930,974 (10.3% of the population in the region and about 6.9% of the total online population)

- In Oceania/Australia: 15,787,221 (48.5% of the population in the region and about 1.9% of the total online population).
- In Middle East: 17,325,900 (6.7% of the population in the region and about 2.1% of the total online population)
- In Africa: 12,937,100 (1.4% of the population in the region and about 1.6% of the total online population)

([Internet World Stats](#), January 2005)

- Statistics compiled and updated in September 2004 by Internet World Stats shows the top 22 countries in terms of Internet penetration level:
  1. Sweden: 74.6%
  2. Hong Kong: 72.5%
  3. United States: 68.8%
  4. Iceland: 66.6%
  5. Netherlands: 66.5%
  6. Australia: 65.9%
  7. Canada: 64.2%
  8. Switzerland: 63.5%
  9. Denmark: 62.5%
  10. South Korea: 62.4%
  11. Singapore: 61.0%
  12. United Kingdom: 58.5%
  13. Liechtenstein: 57.6%
  14. Germany: 57.1%
  15. Bermuda: 54.2%
  16. Japan: 52.2%
  17. Croatia: 52.1%
  18. New Zealand: 52.0%
  19. Taiwan: 51.1%
  20. Faroe Islands: 50.9%
  21. Finland: 50.7%
  22. Norway: 50.0%

([Internet World Stats](#), January 2005)

- Statistics compiled and updated in January 2005 by Internet World Stats shows the top 20 countries in terms of number of Internet users:
  0. United States: 198,878,016
  1. China: 87,000,000
  2. Japan: 67,677,947
  3. Germany: 46,455,848
  4. United Kingdom: 35,309,534
  5. South Korea: 30,670,000
  6. Italy: 28,610,000
  7. France: 24,953,347

8. Canada: 20,450,000
9. Brazil: 18,660,650
10. India: 18,481,000
11. Spain: 14,095,951
12. Australia: 13,410,824
13. Mexico: 12,250,000
14. Taiwan: 11,602,523
15. Netherlands: 10,806,328
16. Poland: 8,970,000
17. Malaysia: 8,692,100
18. Indonesia: 8,000,000
19. Sweden: 6,722,559

([Internet World Stats](#), January 2005)

Denmark has overtaken Sweden as the leading nation in terms of e-readiness, according to research from IBM and the [Economist Intelligence Unit of the Economist](#). The annual "e-readiness ranking" of 64 countries worldwide relegated the former leader to third place. E-readiness is defined as the extent to which a country's business environment is ready for Internet-based commercial opportunities and is calculated on a scale from 1 to 10. Ranking is based on a number of factors including connectivity and technology infrastructure; business environment; consumer and business adoption; social and cultural environment; legal and policy environment; and supporting e-services. 2004 e-readiness top 10 rankings include:

- t. Denmark: 8.28
- u. UK: 8.27
- v. Sweden: 8.25
- w. Norway: 8.11
- x. Finland: 8.08
- y. US: 8.04
- z. Singapore: 8.02
- aa. Netherlands: 8.00
- bb. Hong Kong: 7.97
- cc. Switzerland: 7.96

The report identified an apparent e-readiness trend in Scandinavia, as the region claimed four of the top five spots. Scandinavians have successfully used the Internet to enhance business transactions, and incorporated the medium into their daily routines, while the government has driven development. ([ClickZ Stats](#), April 2004)

## A Review of 2004

In 2004 the online market especially the online advertising market continued its growth over 2003 and we also saw a number of innovations and convergence of technology that had been only blue sky for a number of years.

- eMarketer provided what they believe were the top ten Internet and e-business trends in 2004.
  0. Paid Search Advertising - the main story in Internet advertising in 2004 has been paid search. Spending rose dramatically, with 51% growth to \$3.9 billion in the US alone.
  1. Cross-Channel Shopping - several studies pointed to the notion that the true influence of online buying is greater than just its percentage of total retail buying. eMarketer explains that this is because online browsing for product and pricing information drives in-store purchases. Furthermore, more consumers are dividing their purchases among bricks-and-mortar stores, Internet retail Web sites and mail order catalogues. Multi-channel shoppers tend to spend more than single-channel shoppers on purchases.
  2. Blogs and Really Simple Syndication (RSS) - RSS and corporate blogs have been key online content developments in 2004. Integration of RSS within MyYahoo and the popularity of Mozilla's latest Web browser, Firefox, have helped promote RSS as a pervasive form of content syndication. Corporate blogging has also become popular in 2004, with usage by both Microsoft and Yahoo!.
  3. Strong Broadband Adoption - Japan, China, the UK and France.
  4. Mobile Service - wireless phones and wireless phone services have finally come of age in 2004 and are starting to deliver on their technological promise. Handhelds are now also well on their way to becoming far more than simple communication tools.
  5. IT Overseas Outsourcing - according to a 2004 Accenture survey of executives worldwide, IT is the most commonly outsourced business function.
  6. Health Care and IT - a ten-year plan for several IT initiatives was rolled out in July 2004 by the US Department of Health and Human Services for the country's health care sector. Among the plan's top goals is the creation of an interoperable network through which health care providers will be able to share the electronic medical records of individual patients. Other countries also initiating ten-year IT plans for health care are Australia, Canada and the UK.
  7. VoIP service offerings - business and consumer awareness of VoIP began to grow this year, as leading telecom and cable companies started to unveil their VoIP services. User growth has been slow, however, but eMarketer expects it to pick up in 2005.

8. Linux - according to eMarketer a significant milestone in the development of the Linux operating system occurred in September 2004, as several leading technology firms announced their acceptance of the Linux Standards Base (LSB).
9. China major IT Consumer - China has become one of the three largest producers of IT hardware. IDC estimates total IT spending in China will reach \$25 billion in 2004, with a spending growth for the year second only to India.

During 2004 we saw increased spending in China by information technology companies such as Intel and the China based computer maker Legend cement a deal to buy IBM's personal computer division.

([eMarketer](#), December 2004)

## Search

The search market saw explosive growth in both people search engine optimization, search engine marketing advertising strategies and the way consumers went about using the internet.

- Google still dominates the worldwide search engine market with exactly 56.4% of search engine traffic between April and May 2004, according to [OneStat.com](#).
  - . Google: 56.4%
  - a. Yahoo!: 21.1%
  - b. MSN search: 9.2%
  - c. AOL search: 3.8%
  - d. Terra Lycos: 2.0%

([eMarketer](#), June 2004)
  
- 7. According to a report from OneStat.com, most Internet users worldwide conduct online searches with two-word phrases. The report finds that during the period between December 2003 and January 2004, 32.58% of all online searches were conducted with two words, while:
  - 25.61% were conducted with three words.
  - 19.02% were one-word searches.
  - 12.83% were conducted with four words.
  - 5.64% were conducted with 5 words.
  - 2.32% were conducted with 6 words.
  - 0.98% were conducted with 7 words.

April 2003 data from OneStat.com show that at that time 24.76% of all online searches worldwide were initiated with just one word, indicating a decline in one-word searches over the 10-month period. Two-word and three-word search phrases, on the other hand, have grown in popularity over the time period. ([eMarketer](#), April 2004)

- OpenJaw Technologies has delivered an advanced holiday search engine to Budget Travel (a subsidiary of World of TUI). This move forms part of Budget Travel's initiative to maximise Internet sales and has resulted in an increase of over 3,000% in these sales when compared with the same period last year. ([EyeForTravel](#), January 2005)

A new website, [www.surf2travel.com](http://www.surf2travel.com), has been launched claiming to offer a comprehensive and unbiased directory of travel suppliers, including

operators, agents, cruise, airlines, hotels and car hire companies. The website features over 3,000 operators including Thomson, Thomas Cook, My Travel, First Choice and Kuoni. It allows users to search its database according to destination, type of holiday or name of operator, or a combination of these. It then indicates whether the company is ABTA or ATOL bonded and directs the user to the company's website.

A spokesman for the website told TravelMole that surf2travel.com is a refined 'Google' for the travel industry. The website also features links to travel insurance, resort information, airport websites, tourist board links and travel advice from the Foreign and Commonwealth Office.

([travelmole](#), February 2005)

## Online travel Trends

### Internet Café's

- The cost of Internet access in cybercafes varies greatly country-to-country, according to a study by Foreign Policy magazine. But overall, the cost of Internet access is exorbitant for many people.
  - Prices tend to be higher in Western Europe and North America: an hour of Internet time averages anywhere from \$4.30 in Canada to \$7.00 in Sweden.
  - Elsewhere, prices can be much lower. In South America, prices range from \$1.00 in Bolivia to \$3.45 in Brazil. In Africa, prices go as low as \$0.60 in Ghana to \$5.40 in Nigeria, though most countries see prices of between \$1.00 and \$2.00 per hour. Prices in Asia and Eastern Europe are generally under \$3.00.

The study highlights the fact that while tourists may be able to afford such rates, in some countries this remains a luxury for the majority of the population. Taking into account the spending cash of the people in each country, the cost for one hour of Internet time can cost a full days wage for a large percentage of the population. ([eMarketer](#), July 2004\_

### Travel planning

- A new travel trend is emerging, as original and personal online 'travel blogs' gain popularity, according to The Wall Street Journal. An article, written by Reporter, Jennifer Saranow, reveals that a growing number of travellers are using travellers' online journals, known as travel blogs, to plan their trips.

The article quotes one international traveller as saying that travel blogs are a valuable resource because they are based on people's experiences, and usually advise holidaymakers to 'try this out,' and 'go here,' whereas a travel book may not. The articles indicates that such blogs (shorthand for web logs) typically use words and photographs to describe their experiences and impressions of a place, often providing a good sense of what it feels like to visit a place.

On the plus side, the article indicates that blogs are timely (avoiding the lapse between editions of printed guidebooks), idiosyncratic and full of detail but that the downside is that a good travel blog for one may not be a good blog for all. The article also says that experts recommend that

people look for blogs written by those appearing to be on the same travelling wavelength and socioeconomic level as themselves.

Companies have been racing to capitalize on the popularity of travel blogs. In September 2004, MyTripJournal.com began letting visitors browse other travelers' journals using a more-advanced keyword system. In October 2004, IgoUgo.com plans to highlight what it thinks are the best blogs on specific destinations. The article reports that even the big travel-guidebook companies are getting into the act. Earlier in 2004, Lonely Planet Publications' web site apparently began offering a personal-trip-account tool provided by MyTripJournal.com, and launched blogs written by its guidebook authors on assignment. ([EyeForTravel](#), September 2004)

- Rough Guides has released a second edition of its “Rough Guide to Travel Online” in response to the increasing use of the Internet by holidaymakers. The guide gives an overview for those wanting to research and book travel on the web including basic information about issues like travel health and visas.

The hundreds of website reviews are ordered in various chapters by hobby, activity or destination. For the second edition, all websites were checked and updated as well as new ones added. New sections like wireless internet advice were been added for people travelling with a laptop. ([Travelmole](#), August 2004)

## Digital Devices & Travel

- Seven out of ten respondents in a Nielsen//Net Ratings survey said they planned to bring a laptop or Net-enabled device on their next vacation:
  - Many are traveling with digital cameras and wish to send e-mails instead of postcards back home.
  - Others admit they just want to check their e-mail.

One-half of respondents said their choice of hotel was actually based on the availability of high-speed connectivity. ([eMarketer Daily](#), June 2004)

## Hotels & Accommodation

- iPerceptions and Hospitality eBusiness Strategies released the first edition of the RUSH Report, an intelligence report on user satisfaction and website performance in the hospitality sector. The Report is based on feedback from nearly 40,000 survey respondents, actual website visitors to hotel brand websites.

Key findings from the RUSH Report include information on:

- The profile of visitors: on average, 56.2% of all visitors on hotel branded websites are leisure travellers and 32.1% are business travellers. As much as 3.08% of the hotel website visitors are involved in meeting or event planning.
- Reason for the visit: 34% of all visitors on hotel branded websites seek information about the hotel, while 30.8% make or change reservations. Another 23% were found to visit sites to research/compare rates.
- Lookers vs. Bookers: online bookers constitute 35.96% of all visitors to the hotel website compared to online lookers, 64.04% of all visitors.
- Customer Segmentation Analysis: business travellers are more critical and demanding than the other user groups.

([EyeForTravelL](#), April 2004)

- Worldwide electronic hotel bookings were up 4.7% for the GDSs and Internet combined, according to TravelCLICK's eMonitor results for the third quarter of 2004. Hotel room nights booked electronically through the GDSs and key Internet sites were also up 5.8% versus the same period in 2003. Internet (consumer online) room nights displayed growth of 9.8% above the third quarter of 2003.

eMonitor results are compiled from TravelCLICK's comprehensive database, which is the exclusive source of hotel industry electronic distribution data from the Amadeus, Galileo, Sabre, and Worldspan GDS. TravelCLICK's eMonitor also includes hotel bookings made through third-party travel Internet websites powered by Pegasus Solutions.

([TravelDailyNews](#), November 2004)

- easyHotel will represent the easyGroup entry into the budget hotel sector. Customers will book their rooms at [www.easyHotel.com](http://www.easyHotel.com) with a credit card on the basis of the earlier you book, the less you pay and periods of high demand will cost more than less popular periods.

Hotel chains are trying to take back control of their bookings from the

online travel agencies, according to an article from the BBC. The BBC reported that top executives from the hospitality business told a Berlin conference that they would pump up investment in their own booking systems.

By doing so, they are following a path laid out by airlines, which now try to sell more flights themselves. Both sectors traditionally gave online brokers big discounts, but now want to keep more of the takings themselves. ([EyeForTravel](#), April 2004)

- According to PhoCusWright projections made in 2003, 2002 was the strongest year for online hotel bookings in the US with nearly 50% growth. PhoCusWright expects growth in online hotel bookings to decline, however, from 2002, from 43% in 2003 to 31% in 2004.
- According to a survey by KPMG, more hotels are being booked online than ever before, but consumers are not booking direct with hotel websites because they are finding lower rates elsewhere on the web.

Findings from KPMG's survey show that when searching for the cheapest room rate in UK hotels, 58% of the cheapest rates were offered by an online travel agent rather than by the hotel direct. In Western Europe as a whole the figure is about 45%.

In the US, online agents like Expedia and Travelocity offer the cheapest hotel around 10% of the time, because in 45% of cases a corporate travel agent offered the best rates. According to KPMG, 14% of US hotel bookings were generated from the Internet in 2003.

KPMG's Global Hotel Distribution Survey 2004 researched room rates through multiple online channels and direct channels (including calls to the hotel and hotel call centre) from 310 hotels in 13 countries. ([Travelmole](#), March 2004)

- [Active Hotels'](#) own research backs this with its partner hotel groups seeing a 50% rise in Internet bookings in 2002 to approximately 12% of their bookings. Active Hotels' CEO added the Internet is fast becoming the most profitable source of reservations for many of their partner hotels. ([EyeForTravel](#), March 2003)
- In the world of online hotel bookings, TravelCLICK reports actual brand Web sites are where the majority of online reservations occur. TravelCLICK's eTRAK report finds that:
  - 21.8% of central reservation office (CRO) bookings made at the 30 major hotel brands were made through the brands' Web sites during the first three quarters of 2004.

- 3.9% were made at retail Web sites.
- 2.3% were made at opaque sites like Priceline.com. Specifically, online bookings at brand sites represented over 71% of centrally booked Internet reservations.

In total, eTRAK finds that during the first three quarters of 2004, just under 66% of CRO hotel bookings were made electronically, while the remainder were made over the phone.

Interestingly, Harris Interactive surveyed over 2,400 US adults ages 18 and older (over 1,600 of whom had stayed in a hotel in the past year) in August 2004 to find that 49% thought online travel sites offered the best deals for hotel rooms, whereas just 22% said the same for hotel Web sites. However, it should be noted that the study was conducted on behalf of Orbitz. 25% thought that the best deal for booking an hotel room was by calling hotels directly.

Brand sites should increasingly contribute to the hotel industry's bottom line, as PhoCusWright estimates the percentage of revenue coming from branded Web sites should rise from 16% in 2004 to 21% by 2006.

US Hotel and Lodging revenue market share by channel (2004 & 2006):

- Call centre: 46% in 2004 / 36% in 2006.
- Online agency: 18% in 2004 / 25% in 2006
- Branded web site: 16% in 2004 / 21% in 2006
- Offline agency: 12% in 2004 / 9% in 2006
- Walk-in: 9% in 2004 / 8% in 2006

([eMarketer](#), January 2005)

- A majority of travellers in North America stated they would not return to a hotel where the Wi-Fi Internet service was unsatisfactory, according to a survey undertaken by JupiterResearch for BT Consulting & Systems Integration. Jupiter Research indicates that hotels are surprised at the speed with which wireless high-speed Internet access has become an expected standard.

Most survey respondents were frequent business travellers to mid-level hotels. The vast majority placed high importance on reliable and free Internet connection and that the findings show that most travelers experienced some Internet service problems:

- Half of them felt the cost was too high.
- Nearly as many could not establish a connection.
- 27% said their service was interrupted.

Overall, 52% said they would probably not return to the hotel where they had the access problem, and half of those would tell their friends and family about the problem. Also 18% of the respondents said they would only stay at the hotel again if the service was free; the same number said they would stay with the same brand, but not the same hotel. Good news for hoteliers is that only 13% of those surveyed said they were not willing to pay at all for Internet access. ([travelmole](#), November 2004)

- BringYourPet.com, one of the world's fastest growing online hotel directories for pet friendly hotel and travel lodging, experienced a 135% increase in new property listings during the 3rd quarter of 2004 when compared with the 1st quarter of 2004. ([TraveldailyNews](#), October 2004)
- The hotel broadband market is finally taking off, according to [In-Stat/MDR](#). The number of hotel properties with broadband access worldwide is expected to grow from 5,207 in 2003 to 26,828 by 2008.

Broadband access in hotels has evolved from a luxury to a necessity as guests have grown accustomed to using it in the office or at home. In-Stat/MDR indicates that hotels see broadband now as an essential element of the guestroom, along with a bed, telephone, and TV. ([eMarketer](#), August 2004)

- [Marriott International Inc](#) has announced that it has completed the installation of in-room high-speed Internet access at more than 2,000 hotels worldwide. Marriott also offers Wi-Fi (wireless Internet access) at 1,500 hotels.

The company expects to complete installation of high-speed Internet access in the US at all its Marriott, Renaissance, Courtyard, Residence Inn, Fairfield Inn, TownePlace Suites and SpringHill Suites hotels by the end of 2004. ([EyeForTravel](#), June 2004)

- More than 160,000 of Accor rooms are booked online every week. Accor revealed that more than 6% of its revenue is accounted by online booking. Accor estimates that one of its room is booked online every 4 seconds.

Sales via Accorhotels.com represents 25% of Accor online sale, while 17% are made via distributors websites. The rest of online sales are made via Accor's brand web sites such as [sofitel.com](#), [novotel.com](#) etc. ([L'Echo touristique](#), June 2004)

## Travel Websites Usage

- According to Nielsen//NetRatings, 33% of active Internet users in France logged onto travel websites in December 2002. This was a higher percentage than in twelve other key markets worldwide:
  - France: 33.23%, up from 29.50% in November 2002.
  - Netherlands: 30.77%, up from 28.81% during the previous month.
  - Germany: 28.87%, up from 26.31% during the previous month.
  - Japan: 28.73%, unchanged compared to the previous month.
  - Switzerland: 27.90%, up from 26.24% during the previous month.
  - UK: 26.80%, down from 27.63% during the previous month.
  - US: 25.52%, down from 25.73% during the previous month.
  - Sweden: 22.32%, up from 21.23% during the previous month.
  - Australia: 17.82%, down from 18.07% during the previous month.
  - Italy: 15.70%, up from 13.95% during the previous month.
  - Hong Kong: 13.93%, down from 16.41% during the previous month.
  - Spain: 7.55%, up from 6.51% during the previous month.
  - Brazil: 3.91%, up from 3.10% during the previous month.

Nielsen//NetRatings indicated that there is an increasing trend among European Internet users to rely less on portals but more on the use of niche sites. This is reflected in the December results, which show sites from Germany (bahn.de), the UK (multimap.com), France (mappy.com and voyages-sncf.com) and Italy (trenitalia.com) ranking alongside lastminute.com, to draw enough users from their respective countries to rank among the top travel sites worldwide. ([Nielsen//NetRatings](#), January 2003)

## Online Car Rental

- Hertz expects the Internet to become its major booking channel in Europe, Africa and the Middle East by 2008 with online bookings accounting for 40% of all transactions.

In 2003, a majority of Hertz customers used the phone to make car rental bookings but this is set to change dramatically by 2008 with telephone bookings dropping by 20% to account for 27% of all transactions. ([TravelDailyNews](#), May 2004)

- Travelocity announced the forthcoming addition of car rentals to its TotalTrip dynamic packaging shopping engine. TotalTrip shoppers will be

able to simultaneously reserve a car while booking their flight, hotel, travel extras options in one itinerary. ([EyeFor Travel](#), October 2004)

## Travel Booking Trends

- According to a report by [PhoCusWright](#) entitled “Online Travel Overview: Market Size and Forecasts 2002-2005”, despite tough economic conditions, a tense political climate and fewer travellers, the US online travel market performed surprisingly well in 2002. The company indicated that in 2002:
  - the online leisure/unmanaged business travel was worth over US\$28 billion. This represented a 37% growth on 2001 figure.
  - 15% of all travel was booked online.
  - 1 in 5 airline tickets were sold online.
  - 9% of hotel reservations were made online.
  - 4% of cruises and vacation packages reservations were made online.
  - 49% of all travel booked online were done via online travel agencies, while booking via supplier websites comprising the other 51%.

PhoCusWright predicts a slower but steady growth in the online travel market for the next few years, assuming improved economic conditions by the second half of this year or early 2004. By 2005, the company estimates that over 30% of all travel will be booked online. ([PhoCusWright](#), March 2003)

- According to a report by PhoCusWright entitled “Online Travel Overview: Market Size and Forecasts 2002-2005”, although airlines are currently the largest online travel segment in the US, it will lose market share as online travel retailers continue to diversify. PhoCusWright indicates that airlines had 54% share of the US online market in 2002, but the figure is likely to fall to 49% by 2005. ([PhoCusWright](#), March 2003)
- According to a report by PhoCusWright entitled “Online Travel Overview: Market Size and Forecasts 2002-2005”, the US online vacation package market will reach US\$1 billion in 2003 (up 74% on 2002 figure), while online cruise sales will reach US \$900 million (up 61%).

Although PhoCuswright estimates that only 10% of packages and cruises will be booked online by 2005, it's an important market as many consumers will make their travel decisions online, even if they ultimately purchase offline. Indeed, already about half of online cruise sales are researched online but purchased offline using the toll-free number on the travel website. ([PhoCusWright](#), March 2003)

- Topaz International has released findings from its 2003 study comparing corporate travel airfares booked via corporate travel agencies to fares booked on various Internet sites including Orbitz, Expedia and Travelocity. The findings show that business itineraries booked through corporate agencies averaged \$69 less than the same itineraries booked online.

However, Topaz, which has been monitoring the results for the last three years, said that the gap between itinerary prices is decreasing in 2003 between the two methods. ([Travel Research Bureau Wire](#), March 2004)

- According to [PhoCusWright Research](#), more than 20 million people will spend US\$20 billion on online travel in 2004. This will represent a 170% increase in two years.

While the growth is led by the United States (with 24% of travel bookings online by the end of 2004 and 29% by the end of 2005), nearly 10% of bookings in Asia Pacific will be made online by the end of 2004 (compared with 3.5% in 2002).

PhoCusWright estimates that the Asia-Pacific online market will grow to US\$8 billion by 2004, up from US\$4.7 billion in 2003 and US\$2.7 billion in 2002. ([Ferri & Partners LLC](#), January 2004)

- According to the “The Travel Industry Worldwide Report” by eMarketer, worldwide online travel sales are projected to reach \$80 billion in 2003.

The report also indicates that by 2008, 28% of managed corporate travel bookings will be made on the Internet (up from 12% in 2003).

eMarketer’s report aggregates data from more than 60 research firms and government agencies and explores the trends shaping the future of the travel industry. ([eMarketer](#), October 2003)

- The results of the Annual Airline IT Trends Survey, conducted by air transport IT specialist SITA and Airline Business magazine, show that:
  - Ticket sales through all web channels represent about 16% of total sales, growing from 10% in 2002 and 6% in 2001. However there are big regional differences. In North America the percentage of tickets sold through all online channels stands at 39.7%, while the figure for Europe is just 14%.
  - Direct ticket sales through airline branded websites have doubled in the last year to be worth around US\$50 billion a year, accounting for around 10% of all airline tickets sold.

SITA indicates that the majority of airline tickets are still sold through travel agents supported by the global distribution systems, but this dominance is being challenged. Ten percent of airlines (mainly the no frills carriers) are currently selling most of their tickets online, but the traditional airlines hope to achieve this “within the next two to three years.” ([Travelmole](#), September 2003)

- eMarketer indicates that although the economy has yet to fully recover, online travel sales continue to be remarkably robust. Indeed, according to data from [comScore Media Metrix](#), during the post-war period between 28 April and 4 May 2003, online travel spending was 39% higher than the same period in 2001 with total online travel consumer spending reaching \$853 million. ([eMarketer](#), July 2003)
- According to Jupiter Research, by 2008, 29% of managed corporate travel bookings will be made on the Internet, up from 12% in 2003. The company also projects that sales in the online managed market will triple in five years from \$8.5 billion in 2003 to \$26.4 billion in 2008.

Jupiter Research believes that the two main factors for that growth will be:

- an increase in the number of companies mandating use of corporate online self-booking systems,
- the entry of the Big Three (Expedia, Orbitz and Travelocity) into the managed travel field.

([Travel Weekly's Technology E-Letter](#), July 2003)

Accor business volume from online bookings increased 44% in 2004 to €431 million. It accounted for nearly 8% of lodging business volume, compared with 5.6% in 2003.

Although the economy segment still accounts for the majority of Internet bookings, online sales in the midscale and upscale segments (Sofitel, Novotel, Mercure and Suitehotel) rose sharply, accounting for 47% of online business volume, versus 40% in 2003. 81% of these bookings were made directly on Accor hotel sites (accorhotels.com, sofitel.com, novotel.com, mercure.com, suitehotel.com, accorvacances.com, accorthalassa.com, ibishotel.com, etaphotel.com, hotelformule1.com, motel6.com and redroof.com).

## Wireless Devices

- Findings from Ipsos' The Face of the Web 2004 reveal that:
  - 2 in 5 households in 12 global markets have browsed the Internet wirelessly;
  - 1 in 5 Internet users have watched TV shows or video streams online;
  - Wi-fi access and usage more than doubled since last year, with the home being the main access point;
  - Globally, high-speed Internet has far surpassed dial-up access, with close to two out of three households using high-speed Internet;
  - Digital camera, DVD player, MP3 player and cell phone ownership around the world continue to grow rapidly.
- The results of GetThere's 2003 Global Survey indicate that for the first time more business travel is being booked online than over the phone. Indeed 53% of corporations responding to the survey said they were making the majority of their bookings online. According to the survey the primary motivation for booking online is the cost saving with 95% of the companies responding to the survey saying that airfares booked online were on average 15% lower than those booked over the phone.

The survey was undertaken among more than 100 large corporations' respondents. ([Travelmole](#) and [EyeForTravel](#), June 2003)

- According to the results of a [My AvantGo](#) Survey, over 80% of PDA users use their devices several times a day while they travel. The travel services its PDA users would most like to carry in their pockets while on the road are access to:
  - Driving directions (65%)
  - Weather (63%)
  - Flight schedules (60%)
  - Flight status (57%)
  - Airport maps (53%)
  - Air fares (43%)
  - Latest news (42%)
  - e-mail (40%)
  - Dining/hotel guides (39%)
  - Itinerary change facility (31%)
  - Exchange rates (22%)
  - Frequent fliers status (19%)
  - Frequent flier offers (18%)
  - Frequent flier partners (14%)
  - Check stocks facility (13%)

The survey also found that:

- Nearly a third of respondents claim to have purchased 100% of their travel online in 2002.
- More than 65% of survey participants would be interested in receiving travel discounts on their PDAs.
- 67% desire flight delay notifications via mobile devices.

AvantGo surveyed 1,058 of its users via its MyAvantGo solutions in April 2003. ([EyeForTravel](#) and [eMarketer](#), April 2003)

- Other findings of the survey show that 52% purchased more than half of their travel needs online, with 29% indicating that they made all their travel arrangements on the Web. In addition, 30% plan to increase their online travel purchases over the coming year. Of those that have made online travel purchases:
  - 72% bought airline tickets.
  - 66% booked a hotel room.
  - 50% rented a car online.

The My AvantGo survey also found that personal travellers are more likely to purchase their trip needs online than business travelers (74% versus 41%). ([CyberAtlas](#), May 2003)

- Tiscover, a global destination system provider, has launched Tiscover05, the company's latest generation system of its online marketing platform, featuring the one of the world's first tourism content solutions for PDAs and mobile phones.

Through Tiscover05's Tiscover Mobile technology, tourism boards and their local partners can stream information on everything from attraction opening hours to local weather to PDAs and mobiles, thereby maximising interaction with consumers both before they book and during their holiday itself. ([SmartTravelNews.com](#), November 2004)

## Web Site Developments

- New functions and services were added to the various sites, especially the international accorhotels.com portal. In addition to French, English and German, the portal has been accessible in Spanish since last year, which helped drive a nearly twofold increase in the number of Spanish-speaking customers in 2004. Regional sites also exist in Portuguese, Chinese, Japanese and Thai. ([TravelDailyNews](#), March 2005)
- Cheapflights.com reports record site traffic for the month of January 2005 with nearly 1.2 million visitors. Building on its success as a leading UK travel site, Cheapflights now ranks as a top 20 travel agency site in the US, according to Hitwise. The company has also enjoyed a 300% increase in revenue over the past 12 months and has seen the number of unique visitors to the site more than double since January of 2004.

Cheapflights.com also generated more than 1 million clicks in January 2005, leading hundreds of thousands of qualified consumers to the cross section of travel partners who display deals on the site. ([TravelDailyNews](#), February 2005)

- Nielsen/NetRatings indicates that close to half of online users engage in some kind of travel research in a given month. The company adds that a growing trend identified is the continued tendency for suppliers to try to attract users directly to their sites rather than solely through agencies like Expedia. ([EyeForTravel](#), February 2005)
- InternetWeek reports that consumer surveys and an analysis of more than 40 travel sites conducted by the Boston-based Customer Respect Group, revealed that 24% of airlines, hotels and resellers of their services, never answered customer inquiries and that 33% did so more than a day later. This means that more than half of online travel websites are slow to respond to customer inquiries. ([EyeForTravel](#), February 2005)
- The Online Customer Respect Study by the Customer Respect Group indicates that the largest travel firms in the world vary greatly in how well they treat their online customers. The Customer Respect Group evaluates each travel company's online customer experience on its:
  - Simplicity (ease of use)
  - Responsiveness
  - Privacy policies
  - Attitude (how customer-centric the site is)
  - Transparency
  - Principles (regarding protecting customer data).

These categories are derived from surveying a representative sample of the adult Internet population on their online experiences, along with analysis by the Customer Respect Group of corporate Web sites.

Overall, the companies studied do best in attitude and worst in responsiveness, with 19% of companies failing to respond to either of two online inquiries sent, and 10% only responding to one. Transparency is also a strong suit of many companies. ([EyeForTravel](#), February 2005)

- Customer Respect Group's rating of customer-friendly airline Web sites in February 2005 places US Airways at the top of the sector: (based on an index scale of 0-10)
  1. US Airways: 8.0
  2. British Airways: 7.8
  3. Air Canada: 7.4
  4. Northwest Airlines Corporation: 7.3
  5. Independence Air: 7.1
  6. Hawaiian Airlines: 6.9
  7. Delta Air Lines: 6.8
  8. JetBlue Airways: 6.8
  9. Continental Airlines: 6.7
  10. Alaska Air Group: 6.5([eMarketer Daily](#), February 2005)

- Consumers are being offered commission on holiday sales if they encourage friends and family to book with a new online club. The club has been established by Internet travel company Octopus Travel, which is backed by Gullivers Travel Associates, claimed to be the world's largest wholesale travel company with annual sales of more than \$1 billion.

The club aims to encourage consumers to introduce 'circles of friends' to the club, with increasing commission earning potential depending on the volume of bookings made. Members who join the OctopusTravelCLUB earn 2% commission (or £5 per £250 booking) if a friend books with the company.

People who sign up can track the amount of commission they have earned and the size of the circle of friends via a password protected account. Commission fees are paid into members' credit cards once they have earned £25 or more. The next step for the club is to arrange for commissions to be donated to charity. ([travelmole](#), December 2004)

- An innovative international investigation into cross-border shopping for online airfares has revealed that European travel sites are better at providing lower fares than US-based sites, and that sister travel sites

(such as Expedia, Opodo and Travelocity) vary widely from country to country. The testing, the first of its kind, was carried out by Consumer Reports Webwatch, a US organisation, together with Consumers International and consumer groups in Belgium, Denmark, France, Germany, the Netherlands and the UK.

Key findings:

- Of the 19 travel websites tested, Travelprice of Belgium, tested best for the cheapest airprices. The second best site was Opodo of Germany, followed by Airstop of Belgium and Expedia of Germany.
- On the whole, English-language American and British sites did not perform as well as sites based in Belgium and Germany. When the sites were ranked by country, the US trailed both countries.
- The flight and fare data provided by sister travel sites (such as the Expedia, Opodo and Travelocity brands) varied widely from country to country, dispelling the belief that these sites are identical except for home pages and translations. Each sister site clearly obtained its own inventory of airfares.
- Nearly all the travel sites were twice as likely to provide a lowest fare on a route that originated in the site's home country, as they were for all routes from all countries.
- In both Europe and the US, many of the most viable low-fare airline choices are not always available in the leading third-party travel sites.
- Despite language and currency issues, several European travel sites could be viable alternatives for American consumers.

([TravelDailyNews](#), November 2004)

- Dynamic packaging will make up a quarter of Lastminute.com's total transaction values in three to five years. The prediction came as the online retailer revealed a 250% growth in the value of dynamic packaging transactions in the peak three months of summer, ending September 30.

Lastminute.com indicates that an on-site survey in June 2004 revealed that 65% of customers prefer independent travel. This gives Lastminute.com confidence that dynamic packaging will be one of the major growth products in the coming years. Based on current trends, dynamic packaging is on track to be at least 25% of total group transaction value in three to five years, according to Lastminute.com. ([travelmole](#), November 2004)

- Orbitz was voted the best Web site for booking business travel by the readers of Business Traveler magazine . Orbitz received the "Best in Business Travel Award" for the third consecutive year in the publication's 16th annual reader survey. ([TraveldailyNews](#), November 2004)

- An internet domain devoted to the travel industry is expected to become available next year. The term “.travel” is due to be registered early in 2005 following technical and commercial negotiations between the Internet Corporation for Assigned Names and Numbers (ICANN) and New York-based Tralliance Corporation, which develops products to enhance online commerce between the travel industry and travelers.

The industry-sponsored .travel domain is being established to improve internet identity, increase adoption of online technology and enhance links between suppliers and their customers. This will lead to greater consumer confidence and increased e-commerce activity, Tralliance claims. Tralliance is to administer the .travel registry and directory to provide a global online source of travel data. ([travelmole](#), November 2004)

- Priceline.com reported third quarter 2004 gross travel bookings of US\$432 million, representing a 44% increase over the same period in 2003. Priceline.com indicates that its growth in gross bookings and gross profit dollars is fuelled by new products and product improvements, as well as contributions from Travelweb. The company reported that:
  - Airline ticket unit bookings grew 65% compared to the same period a year ago.
  - Hotel room night bookings grew 27% compared to the same period last year.
  - Rental car bookings increased 12%.

([travelmole](#), November 2004)

- Expedia, Inc. (operator of Expedia.com and Expedia Corporate Travel) has been named by Executive Travel 2004 readers as the Best Web Site to Book both Business and Leisure Travel. Published by American Express Publishing Corporation, Executive Travel is a lifestyle magazine read by 270,000 frequent travellers. ([TravelDailyNews](#), November 2004)
- easyJet launches new and improved website with the introduction of more cutting-edge online functionality designed to make it even easier for customers to book flights and find the best fares. Highlights of the new easyJet.com include:
  - A flight shopping basket, allowing to book a series of flights (e.g. Edinburgh to London, and then on to Barcelona - and back) in just one transaction. This feature also allows you to make multiple bookings under a single payment.
  - A calendar view allowing users to see the cheapest fares across a 15-day window for any given route.
  - Full compliance with the Disability Discrimination Act stipulations on internet access, making easyJet.com available to an even wider audience.

- A fresh and exciting new look with revised content, making it even easier to find the information.

Last year, easyJet was the first airline to introduce fully flexible online booking changes and look-ups, and these latest developments represent another improvement for customers. ([TravelDailyNews](#), November 2004)

- Atlas Travel is pushing for better customer service through the use of eStara's Push to Talk functionality on [Atlastravel.com](#) and in clients' e-ticket receipts and invoices. The eStara product uses Voice Over Internet Protocol technology to connect clients with travel agents.

Clients can click a button to print an e-ticket receipt from their agent, select whether they want to talk by PC or phone and then are connected with their travel agent. The call is free and just requires access to the Atlas Travel Web site and a telephone. ([Travel Weekly](#), November 2004)

- TravelMedia is offering a new product to agents - the Holidayfinder. The new product consists of an "electronic brochure rack" that allows them to search e-brochure content of numerous operators. The Holidayfinder service can be used by agents to search brochure content according to various criteria such as operator, hotel, resort, or special requests like kids club. It can also be incorporated into an agency website .

TravelMedia claims that the product could help agents to sell more holidays at 'brochure price' as well as enabling them to collect emails for marketing activities through requests by customers to have brochure pages emailed to them. ([Travelmole](#), June 2004)

- Traditional agency share of cruise bookings will shrink from 90% to 60% by 2006, while supplier direct sales by Web and phone will reach 25%, according to a study conducted by PhoCusWright.

PhoCusWright predicts that Web based sales will account for 15% of cruise sales by 2006. ([Travelmole](#), June 2004)

- In March 2004, [Travelocity](#) has redesigned its Web site to look less "visually crowded," while also changing its logo. Indeed, when researching concepts for the new site, Travelocity found that consumers were confused by "too many offers and features competing for their attention." ([Travel Weekly Cross Roads](#), March 2004)
- A new company aims to produce e-brochures in an effort to cut the trade's £4 billion annual bill for printed promotional material. E-literature specialist ebxp claims to be able to exploit new digital technology on the web to cut the cost of traditional brochure production, storage and distribution. It is

estimated that travel companies spend £2 on every brochure printed.

Mark Warner Holidays and Barbados Tourism have been participating in a year-long test market programme. Ebxp claims to be able to create on-screen literature while retaining the three-dimensional look and feel of printed brochures, with instant turning of pages. The company says images, which can be printed at home, are sharper than PDFs, which suffer from slow downloading and cumbersome scrolling. ([Travelmole](#), March 2004)

- According to AdRelevance, as per 15th March 2004, the travel industry was the fifth industry in terms of online advertising impressions, representing 9% of total impressions (or 1,498,752,000 impressions). ([AdRelevance](#), March 2004)
- According to a new study entitled “Click-Here Commerce: Online Travel” by management consulting firm Shelley Taylor & Associates, travel websites are not as good as Amazon five years ago. The report looked at a total of 46 online travel sites including 17 from the UK along with 22 from North America, six from Europe and one other.

The report indicates that even the top five sites were not as good as they should and could be. The author of the report detailed what Amazon was doing that travel websites are not, it includes factors such as:

- Personalisation - welcoming users back to the site.
- Keeping records of customers’ previous purchases and making recommendations.
- Having a number of paths to the same information.
- Making things very easy to find despite the fact they have a vast array of products and services.

Other criticisms included the fact that many sites featured no specific paths for business travellers and only 13 of the 46 sites featured language choices on the home page.

The sites were studied between October and December 2003 using over 800 criteria including site navigation, the home page, pre-sale assistance, travel resources, utilities, the booking engine, product path, checkout, post-transaction communication and account management. ([Travelmole](#), February 2004)

## eCommerce

The more payment methods offered by e-commerce web sites in North America, the higher the sales conversion, according to a report from CyberSource. Specifically, CyberSource finds that North American e-commerce Web sites offering 4 or more payment methods get, on average, sales conversion rates of 72%, while Web sites offering 3 payment methods receive conversion rates of 71%. This is about 20% higher than those Web sites offering just 1 payment method.

CyberSource determines that nearly all sites offer general purpose card payments (payments made with Visa, American Express, Master Card or Discover cards) while:

- 46% offer gift certificate payments
- 41% allow consumers to choose to be charged with recurring billing options.
- Over 20% offer choices like PayPal or electronic checks.

CyberSource surveyed 147 decision makers at e-commerce Web sites in North America between September and November 2003. ([eMarketer](#), May 2004)

- According to a [Channel Intelligence](#) report, nearly half (45%) of the respondents to a Spring 2003 online questionnaire indicated that they were researching product information, rather than making an immediate buy. Of the remaining 55% that had purchasing intentions:
  - 11% immediately bought online.
  - 6% immediately bought offline.
  - 21% indicated they would buy within 48 hours.
  - 17% indicated they intended to buy within the week.

([CyberAtlas](#), May 2003)

## Looking Forward

Forecasting what will occur in 2005 and beyond especially in regard to technology can be fraught with danger however there trends and information which are important to be aware of.

- The number of Internet users will surpass 934.5 million in 2004 and will top 1.07 billion in mid 2005, according to eTForecasts. eTForecasts believe that:
  - There is little Internet user growth in the developed countries, but in the next five years many Internet users will be supplementing PC Internet usage with Smartphone and mobile device Internet usage.
  - The growth of Internet users will continue in the developing countries for another decade.
  - The US continues to lead with over 185 million Internet users predicted for year-end 2004. Internet usage is growing strongly in China, which surpassed Japan for second place in 2003.
  - Much of future Internet users growth will come from populous countries such as China, India, Brazil, Russia and Indonesia. These countries will also see strong growth of wireless web usage and for many new Internet users the cell phone will be their only Internet access device.

eTForecasts estimates for Year end 2004 are as follows:

- i. US: 185,550,000 (19.86% share)
- ii. China: 99,800,000 (10.68%)
- iii. Japan: 78,050,000 (8.35%)
- iv. Germany: 41,880,000 (4.48%)
- v. India: 36,970,000 (3.96%)
- vi. UK: 33,110,000 (3.54%)
- vii. South Korea: 31,670,000 (3.39%)
- viii. Italy: 25,530,000 (2.73%)
- ix. France: 25,470,000 (2.73%)
- x. Brazil: 22,320,000 (2.39%)
- xi. Russia: 21,230,000 (2.27%)
- xii. Canada: 20,450,000 (2.19%)
- xiii. Mexico: 13,880,000 (1.49%)
- xiv. Spain: 13,440,000 (1.44%)
- xv. Australia: 13,010,000 (1.39%)

In terms of technology and innovation in 2005 and beyond keep a watchful eye on the following and how they can positively affect your business;

- eMarketer's team of analysts and researchers have given their predictions of what to look out for in 2005 in the Internet, e-business and emerging tech arena.
  0. **Alternative Advertising:** While paid search will continue to dominate online advertising in 2005, the growing fear of digital video recorders stealing eyeballs from TV commercials will increasingly impel brand marketers to devote more of their budgets to "alternative" vehicles. eMarketer explains that for some of these traditional companies, that alternative will simply mean more online advertising.
  1. **RSS:** RSS (RDF Site Summary - formerly called Rich Site Summary) will grow as a pervasive form of content syndication. Supporting the idea of alternative advertising, eMarketer says we should expect to see advertisers attempting to leverage RSS as a platform for targeted advertising.
  2. **AOL Changes:** AOL has lost 4 million subscribers in the last 2 years. It's dial-up business is stagnating as Internet users migrate to broadband. In 2004, online advertising revenue made up approximately 11% of AOL's total revenue. By the end of 2005, AOL will be hoping that online advertising revenue will make up close to 20% of its total revenue as its access business continues to decline.
  3. **On-Demand TV:** Consumers are taking more control of their TV experience.
  4. **Wireless Broadband:** Look for more wireless broadband in 2005, as well as more consolidation among operators, particularly throughout the Americas. TV is also coming to wireless handsets, in the form of clips and even streaming video.
  5. **Radio Frequency Identification (RFID):** IDC estimates US retailers and their suppliers spent roughly \$90 million in 2003 on RFID, and AMR Research estimates consumer goods companies, many of which supply retail giant Wal-Mart, spent \$250 million on RFID tags in 2004. eMarketer predicts adoption by the retail sector will continue in 2005, as part of a long term trend. Reports put Wal-Mart's RFID spending alone at \$3 billion over the next several years.
  6. **Voice-over Internet Protocol (VoIP):** Though growth in the number of VoIP users was slow in 2004, eMarketer says it should pick up significantly in 2005. Awareness among businesses and consumers grew in 2004, as telecom and cable providers rolled out their VoIP offerings.
  7. **Linux:** In 2005, eMarketer expects Linux adoption in the enterprise to continue, especially as part of the server upgrade cycle.
  8. **Cross-Channel Retail:** Retailers will think of their online stores less as unique, standalone channels by increasing their efforts to integrate inventory management fulfillment activities and marketing

across all sales channels — stores, Web sites and catalogs. They will also spend more time studying the behavior of cross-channel shoppers in order to create incentives that keep these shoppers from browsing in their online/offline stores but then making their actual purchase with a competitor.

9. **IT Security:** Security has been one of the top three IT priorities among businesses for the past 3 years, as Morgan Stanley reported in 2003 that security was the top network spending priority among US CIOs for 2004. eMarketer expects this trend to continue in 2005.
- As many as 70% of advertisers and agencies plan to increase online ad spending in 2005, with a specific interest in ramping up their use of online video, according to an informal survey conducted by Unicast, an online video ad vendor.

The survey found that within the next 12 months:

0. 88% of respondents believe online video will become as important as other online tools like Flash and search in their online campaigns.
1. The remaining 12% expect it to become "more important" than other online vehicles.

The findings are based on a year-end survey Unicast conducted with a small sample of agency and advertiser customers. ([ClickZ Stats](#), November 2004)

## Sources

The following sources have been used in acquiring this information and acknowledged where possible in the body of the document.

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Eye for Travel  
Travelmole  
Travel Daily News  
PhoCusWright Research  
Travel Weekly  
My AvantGo  
Cyber Atlas  
TravelDailyNews  
In-Stat/MDR

***Business Performance International***

