



China Online Tourism Industry Report, 2011

Sep. 2011

This report

- ◆ **Analyzes the operation of China tourism industry and market segments.**
- ◆ **Focuses on China online tourism market and online marketing platforms.**
- ◆ **Highlights the key Online Travel Agencies (OTA).**

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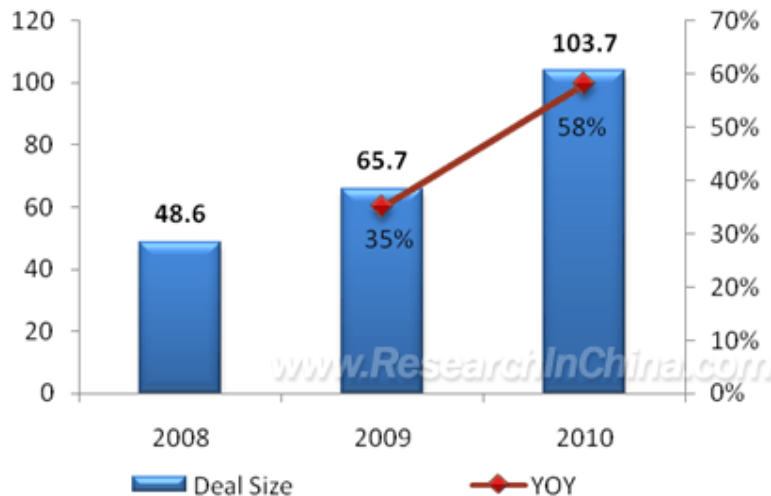
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Abstract

With the popularity of internet and e-commerce, the market scale of online tourism industry has seen fast-growing development. In 2010, the deal size of online tourism market in China increased by 58.0% year-on-year to RMB103.74 billion, making up 7.2% of the overall tourism market.

Online Tourism Market Deal Size and Growth Rate, 2008-2010 (RMB bn)



Source: ResearchInChina

The market scale of online tourism reservation, a key link of online tourism business, is also rising. In 2010, the market scale of online tourism reservation in China grew by 58.4% year-on-year to RMB6.16 billion. In terms of the type of online tourism products, the online tourism market consists of online airline ticket reservation market, online hotel reservation market and online vacationing product reservation market.

In 2010, online airline ticket reservation scale hit RMB2.59 billion, accounting for 42.2% of the total online tourism reservation market, while online hotel reservation scale and online vacationing product reservation scale realized RMB2.85 billion and RMB720 million, making up 46.3% and 11.5% of the total, respectively. Travel & vacationing product market has become the growth engine of online tourism industry of China. In future, the online tourism market is expected to develop from business travel market represented by single products such as airline ticket and hotel to leisure travel market represented by self-guided tour, DIY tour and team tour.

Ctrip.com International, Ltd, with 5,000 employees and more than 2,000 customer service staff, occupies the largest market share by merit of high-quality searching engine and perfect services, with the profit of airline ticket business alone accounting for 8-10% market share, while airline companies only occupy 10%-15%. In 2011Q2, its net operating revenue hit USD129 million, up 20% year-on-year.

Like Ctrip.com International, Ltd, the featured products of elong.com are also hotel and airline ticket and the main source of income is also hotel. The airline ticket of elong.com mainly sources from China Eastern Airlines. As an online tourism service provider, elong.com offers a series of services like map searching, panoramic view of hotel, guide to popular destinations at home and abroad, user reviews, etc. In 2011Q2, the net operating revenue of elong.com registered USD21.5 million, up 17% year-on-year.

Since 2010, more and more competitors have joined the online tourism market. Internet tycoons including Baidu and Tencent poured efforts to invest in the market shortly after Taobao's launch of travel reservation platform and 360buy's opening of airline ticket business. In June 2011, Baidu announced a strategic investment of USD306 million to Qunar.com.

In May 2011, Tencent invested roughly USD84.4 million to elong.com, becoming the second largest shareholder of elong.com with 16% stake. Elong.com and Tencent planned to enhance cooperation in business, in an attempt to make the online travel products of elong.com available to 674 million QQ subscribers of Tencent. This move is expected to narrow the gap between elong.com and Ctrip.com International, Ltd.

In addition, the second-tier enterprises in the online tourism industry including Tuniu.com, LvMaMa.Com and lotour.com are getting support from venture capital. The online tourism industry of China is not only promising, but will also be much more competitive in the future.

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