

# EXECUTIVE SUMMARY

## Global Growth for Downloadable Travel Guides

Fastcheck Trend Report 2009  
Released April 2009



### REPORT SUMMARY

Despite the current state of the economy and its impact on the travel industry, downloadable travel guides are increasing in popularity. In fact, findings from Fastcheck show that over the past six months, downloads from over 100 travel sites went up by an average of 24%.

Over the same period, usage of free PDF travel guides from [www.arrivalguides.com](http://www.arrivalguides.com), the largest website among those that were monitored, increased by 42%. Notably, downloads hit a record high in March 2009.

The study is particularly interesting as data from 2008 indicates that seasonal demand for travel guides usually decreases from February to March (only to increase before and during the summer vacations), which suggests that the recession may be triggering more users to look for free travel guides online this year.

A recent Fastcheck survey of 453 users also show that men download more guides than women, and that the majority of the users are relatively young (aged 21-35) or middle-aged (aged 36-50).

While Fastcheck's guides do not represent the entire industry, their significant market share suggests that the global market for free downloadable travel guides is growing.

#### About Fastcheck

Fastcheck is a world-leading supplier of free PDF travel guides. The product line covers over 380 destinations in up to 22 languages and reaches users in more than 160 countries. For more information, email Scencia International at [press@scencia.com](mailto:press@scencia.com) or visit [www.arrivalguides.com](http://www.arrivalguides.com).

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# TRENDS - DOWNLOADABLE GUIDES 2009

## Market Overview

Findings from Fastcheck's study of more than 100 travel sites indicate a significant increase in downloads of free travel guides over the last 6 months. In average, usage went up by 24%, while viewings on some of the largest sites almost doubled. Notably, the highest downloads in 2009 were measured in the last month of the study (March 1-April 1, 2009).

The largest number of downloads were made on [www.arrivalguides.com](http://www.arrivalguides.com), a site that is owned by Fastcheck. Between October 1 2008 and April 1 2009, downloads on the site rose by 42%. At the time of the study, the site offered a free product line that consisted of 382 destinations in 21 language variations, which is projected to reach 14 million users in 2009.

Another sample collection of data that included 942,518 downloads from January to April 2009 reveals that the free travel guides are downloaded in more than 160 countries. There is, however, a significant variety in volume. Western countries with widespread, high-speed Internet access download the largest numbers. With 16.2%, United States is the leading market, followed by Australia at 8.7% and Sweden at 8.2%.

## ASIA EMERGES

A comparative analysis of data between continents confirm that Western users are downloading free travel guides to a much higher extent than those in the East. But there are exceptions. Asian countries, and especially China, which now has the largest number of Internet users in the world, are emerging as increasingly important markets. Nevertheless, the region still only accounts for 7.6% of all downloads.

## Top 10 Countries with the Highest Downloads of Free Travel Guides

#	COUNTRIES	DOWNLOADS	SHARE %	INTERNET USERS
1	United States	152,704	16.2%	220,141,969
2	Australia	81,993	8.7%	16,736,347
3	Sweden	77,040	8.2%	7,295,200
4	UK	65,243	6.9%	43,221,464
5	Germany	53,910	5.7%	55,221,183
6	Italy	53,105	5.6%	28,388,926
7	Norway	46,328	4.9%	3,993,400
8	Spain	39,624	4.2%	27,552,604
9	Denmark	33,405	3.5%	4,408,100
10	France	25,632	2.7%	40,858,353

Source: Fastcheck Index, April 2009 and Internet World Stats ([www.internetworldstats.com](http://www.internetworldstats.com))

## NORTH AMERICA GROWS

With more than twice as many downloads as Asia and a fifth of the global market, North America continues its upward trend. The United States accounts for 96% of the activity in the region and demand remained strong during the spring. As a continent, America is also showing signs of growth in South America.

Today, demand in Argentina and Brazil is greater than in the rest of the region, which is consistent with their higher number of Internet users. Together, the two countries have an estimated 66 million Internet users, which equals 63.5% of the online penetration in South America.

Downloads from the Caribbean islands were noteworthy if counted per capita - but low in relation to the rest of the region.

## EUROPE- STILL STRONG

The largest number of active users reside in Europe, which currently make up for more than 60% of all downloads. *Continues on page 4.*

# SNAP SHOT - THE UNITED STATES

## The United States

**Population:** 303,824,646

**Internet users:** 220,141,969

**Penetration of population:** 72.5%

**Percentage of World users:** 15%

**The United States download more free travel guides than any other country, and account for 16.2% of all downloads. 82% of the guides are requested in English, while the remaining 18% are downloaded in 21 language versions of which European-originated languages dominate.**

### NEW YORK TOPS THE LIST

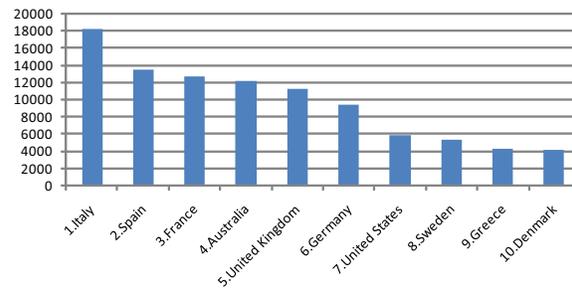
Between the U.S. cities, New York currently stands out as the most popular destination. The city is in three times as high demand as Los Angeles, which comes in second place. Meanwhile, Los Angeles is twice as popular as Miami, which ranks third.

Other cities in high demand are Honolulu, Chicago, Las Vegas, Washington, D.C., Boston, and San Francisco.

### HOT RIGHT NOW

Demand for the Southern European destination guides has been surprisingly strong during the spring and currently accounts for over 35% of U.S. readership. Requests for Northern European City Guides is also heavy, especially for established cities like London, Paris and Amsterdam. As in 2008, Northern Europe accounted for almost 40% of U.S. readership. The remaining guides covered Asia, Australia, New Zealand, and the U.S.

## The 10 Most Popular Countries



## AMERICA'S MOST POPULAR DESTINATIONS (SUMMER 2009)

1. Italy, Europe
2. Spain, Europe
3. France, Europe
4. Australia, Australia
5. United Kingdom, Europe
6. Germany, Europe
- 7. United States, America**
8. Sweden, Europe
9. Greece, Europe
10. Denmark, Europe
11. Austria, Europe
12. Turkey, Europe
13. Poland, Europe
14. The Netherlands, Europe
15. Ireland, Europe
16. Portugal, Europe
17. New Zealand, Australia
18. Croatia, Europe
19. Norway, Europe
20. Thailand, Asia
21. The Philippines, Asia
22. Japan, Asia
23. The Czech Republic, Europe
24. Egypt, Africa
25. Hungary, Europe

*Source: Fastcheck Trend Study (April 2009)*

>> Leading, in terms of having the most active users, is Northern Europe, where the highest amount of downloads can be tracked to Scandinavia, the United Kingdom, and Germany.

Southern Europe, led by Italy and Spain, also continue to show intensifying demand, as does Eastern Europe. In the region, the most active users were found in Poland and the Czech Republic. Russia is also emerging as a growing market.

### HIGH DEMAND IN AUSTRALIA

In terms of downloads, Australia and Oceania comes in third place and accounted for almost 11% of the overall global activity. A division between countries in the region shows that Australia makes up for an overwhelming 89% of the downloads, followed by New Zealand at over 10.9%.

### AFRICA REMAINS DIVIDED

The lowest amount of activity was noted in Africa. With the exception of South Africa and the Middle Eastern countries, the demand for downloadable travel guides is only beginning

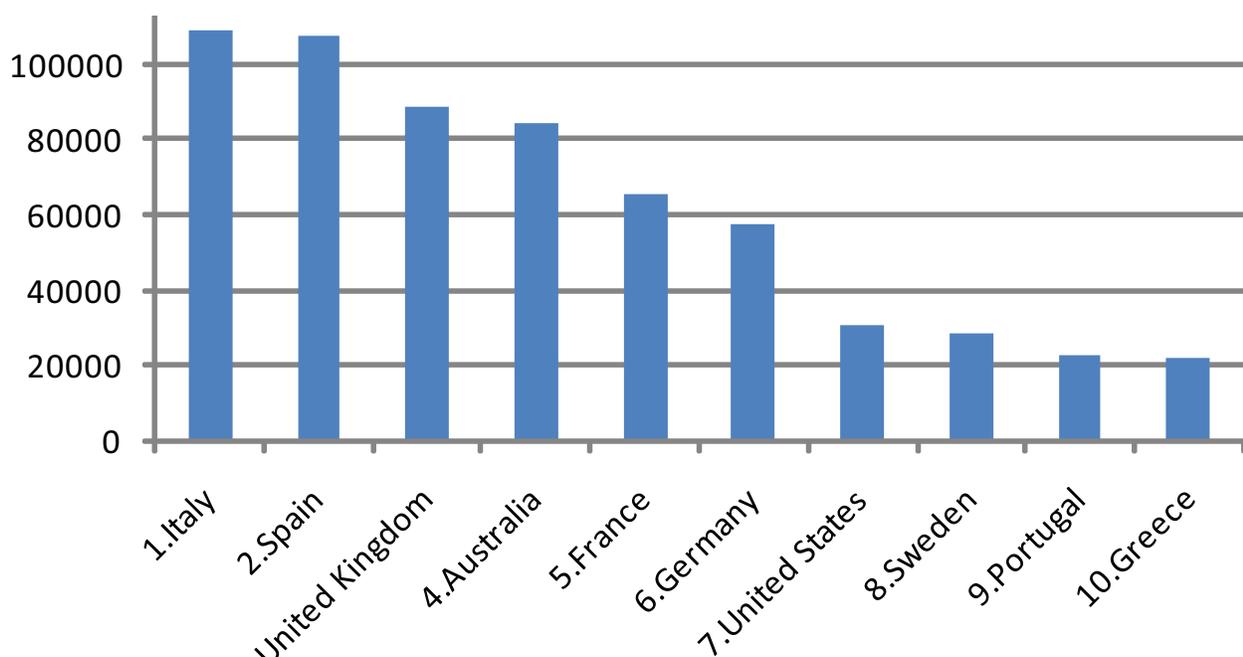
to increase. It should, however, be emphasized that among the 29 African countries that were monitored, all downloaded guides. If divided into smaller regions, the Middle East overshadowed the rest and download almost 6 times as many guides as their African neighbors.

Data from the Greater Middle East also shows that the highest number of users in the region originate from Israel, the United Arab Emirates, and - surprisingly - Iran, which is emerging as a growing market. A substantial amount of downloads of free travel guides were also tracked to Morocco, Saudi Arabia, Egypt and Qatar.

### Everyone wants Italy!

Data from the first three months of 2009 shows that the most popular travel guides featured European destinations. Based on “popularity per country”, which in some cases include multiple destinations, Southern Europe is booming. Guides from Italy (1) and Spain (2) prevail in terms of downloads, but France (5) and Portugal (9) are also very popular. The five most downloaded guides from the region featured Barce-

## Top 10 Most Popular Country Destinations (Worldwide)



lona, Paris, Rome, Milan, and Venice.

United Kingdom, which includes 22 destinations, ranked third – but is still number one in terms of having the most popular guide of this year (and last year), which is London.

Among the users' 10 favorite countries, only Australia and Japan were located outside Europe. Sydney and Melbourne remain the most popular cities in Australia, while Tokyo has become the most requested destination guide in Asia.

*With regard to the popularity of guides, it should be noted that Fastcheck provides more guides for Europe than the other regions.*

## European cities in demand

Data that was collected from all incoming countries over the last 12 months (between 1 April 2008 and 1 April 2009) also revealed that Europe is in higher demand than other regions. As in previous years, London ranked as number one, followed by Barcelona, Paris, Rome, and Berlin.

During the same period, the 10 most popular destinations outside Europe, which all appear on the top 50 list, featured one guide from North America (New York), four from Australia (Melbourne, Sydney, Brisbane, and Cairns) and five from Asia (Tokyo, Hong Kong, Bangkok, Singapore, and Phuket.)

## English rules

65% of the travel guides were downloaded in English, making it the most popular language version. Among the remaining 21 languages, German tops the list and accounts for 7% of the downloads. As a high percentage of the guides are available in German, the findings could be expected, but it also reinforces conclusions from previous research that shows that Germans, who takes more trips than any other nationality in the world, use Internet as their primary source of travel research.

## TOP 50 GUIDES (2009)

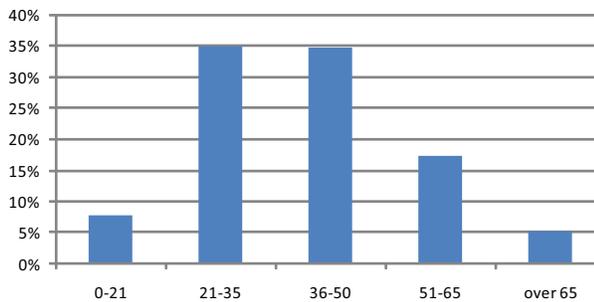
- 1.London, United Kingdom
- 2.Barcelona, Spain
- 3.Paris, France
- 4.Rome, Italy
- 5.Berlin, Germany
- 6.Amsterdam, The Netherlands
- 7.Melbourne, Australia
- 8.Prague, Czech Republic
- 9.Sydney, Australia
- 10.Tokyo, Japan
- 11.Hong Kong, China
- 12.Dublin, Ireland
- 13.Stockholm, Sweden
- 14.Milan, Italy
- 15.Copenhagen, Denmark
- 16.New York, United States
- 17.Venice, Italy
- 18.Madrid, Spain
- 19.Mallorca, Spain
- 20.Lisbon, Portugal
- 21.Gold Coast, Australia
- 22.Malaga, Spain
- 23.Budapest, Hungary
- 24.Nice, France
- 25.Bangkok, Thailand
- 26.Athens, Greece
- 27.Valencia, Spain
- 28.Brisbane, Australia
- 29.Vienna, Austria
- 30.Alicante, Spain
- 31.Singapore, Singapore
- 32.Brussels, Belgium
- 33.Cairns, Australia
- 34.Phuket, Thailand
- 35.Istanbul, Turkey
- 36.Edinburgh, United Kingdom
- 37.Munich, Germany
- 38.Krakow, Poland
- 39.Beijing, China
- 40.Florence, Italy
- 41.Porto, Portugal
- 42.Malta, Malta
- 43.Faro, Portugal
- 44.Oslo, Norway
- 45.Perth, Australia
- 46.Crete, Greece
- 47.Frankfurt, Germany
- 48.Adelaide, Australia
- 49.Kuala Lumpur, Malaysia
- 50.Bratislava, Slovakia

*Source: Fastcheck Trend Study (April 2009)*

# FASTCHECK SURVEY

A survey that Fastcheck conducted via an online poll of 453 people showed that the average user is male. In fact, as many as 64% of the respondents were men, which came as a surprise as females are known to make most of the travel decisions. The users were also young (in their 20s or early 30s) or middle-aged (aged 36-50), and single/without children.

## Users' Age Groups



The findings show that 85% of the users download their guide before traveling. Among those, one fifth read the guide/s to determine where to travel.

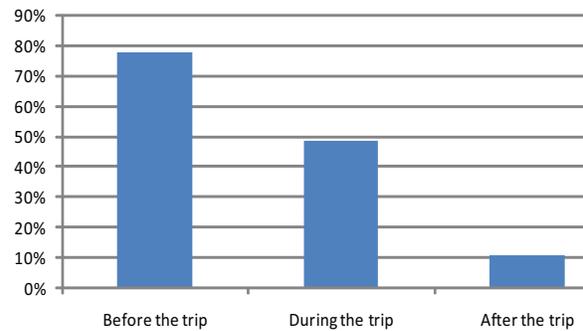
As might be expected, the vast majority of the travelers (90%) state that they use the guide in connection to traveling. The remaining 10% read it for inspiration.

Among the travelers, 77% use the guide to prepare themselves for the trip, while 49% read it during their trip. The remaining 11% read it once they come home.

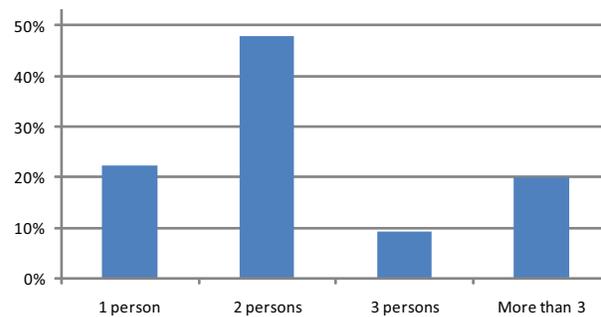
The survey also revealed that as many as 73% share the guide with at least one more person, and 25% of those show it to 3 people or more.

The poll was fielded in November 2008. *All statistics reflect the percentages of consumers polled.*

## When will you read the guide?



## How many people will use the guide?



### Disclaimer

Although the information in this report has been obtained from sources that Fastcheck believes to be reliable, its accuracy and completeness cannot be guaranteed. Opinions and estimates included in the report constitute the views of survey respondents combined with data and our judgement as of this date and are subject to revision.