Hiroyuki NISHIMURA

Co-Founder & Director
Venture Republic Group
10 Must-Try Foods In Hiroshima, full of love from locals!
### Top OTAs/Metasearches in Japan by Traffic

<table>
<thead>
<tr>
<th>Rank</th>
<th>Website</th>
<th>Total Visits (M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>jalan.net</td>
<td>27.2</td>
</tr>
<tr>
<td>2</td>
<td>travel.rakuten.co.jp</td>
<td>26.4</td>
</tr>
<tr>
<td>3</td>
<td>tripadvisor.jp</td>
<td>12.8</td>
</tr>
<tr>
<td>4</td>
<td>Travel.jp/Hotel.jp</td>
<td>6.7</td>
</tr>
<tr>
<td>5</td>
<td>jtb.co.jp</td>
<td>6.6</td>
</tr>
<tr>
<td>6</td>
<td>his-j.com</td>
<td>5.7</td>
</tr>
<tr>
<td>7</td>
<td>travel.yahoo.co.jp</td>
<td>5.1</td>
</tr>
<tr>
<td>8</td>
<td>expedia.co.jp</td>
<td>5.1</td>
</tr>
<tr>
<td>9</td>
<td>tour.ne.jp</td>
<td>4.5</td>
</tr>
<tr>
<td>10</td>
<td>rurubu.travel</td>
<td>4.0</td>
</tr>
<tr>
<td></td>
<td>ikyu.com</td>
<td></td>
</tr>
<tr>
<td>Website</td>
<td>Total Visits (M)</td>
<td></td>
</tr>
<tr>
<td>---------------------</td>
<td>------------------</td>
<td></td>
</tr>
<tr>
<td>Qunar</td>
<td>15.3</td>
<td></td>
</tr>
<tr>
<td>Skyscanner/Tianxun</td>
<td>9.3</td>
<td></td>
</tr>
<tr>
<td>Travel.jp/Hotel.jp</td>
<td>6.7</td>
<td></td>
</tr>
<tr>
<td>Trivago</td>
<td>4.9</td>
<td></td>
</tr>
<tr>
<td>Ixigo</td>
<td>2.9</td>
<td></td>
</tr>
<tr>
<td>Hotelscombined</td>
<td>1.3</td>
<td></td>
</tr>
<tr>
<td>Kayak</td>
<td>0.8</td>
<td></td>
</tr>
<tr>
<td>Wego</td>
<td>0.5</td>
<td></td>
</tr>
</tbody>
</table>

By Similarweb as of Sep 2016
<table>
<thead>
<tr>
<th>Website</th>
<th>Total Visits (M)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trivago</td>
<td>71.2</td>
</tr>
<tr>
<td>Skyscanner</td>
<td>62.6</td>
</tr>
<tr>
<td>Kayak</td>
<td>48.5</td>
</tr>
<tr>
<td>Hotelscombined</td>
<td>17.0</td>
</tr>
<tr>
<td>Qunar</td>
<td>15.3</td>
</tr>
<tr>
<td>Momondo</td>
<td>12.3</td>
</tr>
<tr>
<td>Travel.jp/Hotel.jp</td>
<td>6.7</td>
</tr>
<tr>
<td>Wego</td>
<td>3.0</td>
</tr>
<tr>
<td>Ixigo.com</td>
<td>2.9</td>
</tr>
<tr>
<td>hipmunk.com</td>
<td>2.7</td>
</tr>
<tr>
<td>Tianxun.com</td>
<td>1.0</td>
</tr>
<tr>
<td>Room77.com</td>
<td>0.5</td>
</tr>
</tbody>
</table>

By Similarweb as of Sep 2016
Our Uniqueness

MetaSearch
- Flights
- Packages
- Hotels
- Private Accommodations
- Local activities

Content
- Destination Guide Articles
- Accommodation Guide Articles
- Private Accommodations
- Local activities
Japan Travel Market

*Size Does Matter.*
## Size of Japanese Travel Market

### Absolute terms

**In which countries was the direct contribution (absolute terms) of Travel & Tourism to GDP greatest in 2015?**

<table>
<thead>
<tr>
<th>Direct GDP</th>
<th>2015 constant US$bn</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 United States</td>
<td>488.0</td>
</tr>
<tr>
<td>2 China</td>
<td>224.0</td>
</tr>
<tr>
<td>3 Germany</td>
<td>130.7</td>
</tr>
<tr>
<td><strong>4 Japan</strong></td>
<td><strong>106.7</strong></td>
</tr>
<tr>
<td>5 United Kingdom</td>
<td>103.7</td>
</tr>
<tr>
<td>6 France</td>
<td>89.2</td>
</tr>
<tr>
<td>7 Mexico</td>
<td>79.7</td>
</tr>
<tr>
<td>8 Italy</td>
<td>76.3</td>
</tr>
<tr>
<td>9 Spain</td>
<td>68.8</td>
</tr>
<tr>
<td>10 Brazil</td>
<td>56.3</td>
</tr>
</tbody>
</table>

### Total GDP

**In which countries was the total contribution (absolute terms) of Travel & Tourism to GDP greatest in 2015?**

<table>
<thead>
<tr>
<th>Total GDP</th>
<th>2015 constant US$bn</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 United States</td>
<td>1,469.9</td>
</tr>
<tr>
<td>2 China</td>
<td>853.8</td>
</tr>
<tr>
<td><strong>3 Japan</strong></td>
<td><strong>326.1</strong></td>
</tr>
<tr>
<td>4 United Kingdom</td>
<td>315.6</td>
</tr>
<tr>
<td>5 Germany</td>
<td>299.7</td>
</tr>
<tr>
<td>6 France</td>
<td>221.1</td>
</tr>
<tr>
<td>7 Spain</td>
<td>192.0</td>
</tr>
<tr>
<td>8 Italy</td>
<td>185.9</td>
</tr>
<tr>
<td>9 Mexico</td>
<td>172.3</td>
</tr>
<tr>
<td>10 Brazil</td>
<td>152.0</td>
</tr>
</tbody>
</table>

*by World Travel & Tourism Council : 2016 League Tables*
Domestic >>>> Outbound + Inbound

The Amount of Consumption

JPY Trillion


by Ministry of Land, Infrastructure, Transport and Tourism, Japan
Inbound Tourism Surges

# of Travelers

by Ministry of Land, Infrastructure, Transport and Tourism, Japan
Japan Inbound Tourism Market: How Big?

By Ministry of Land, Infrastructure, Transport and Tourism, Japan/Ministry of Finance, Japan
Inbound Travelers to Japan

JPY 3.7 Trillion (2016)

- China: 39%
- Taiwan: 14%
- South Korea: 10%
- Hong Kong: 8%
- U.S.: 6%
- Southeast Asia: 9%
- Others: 5%
- 5 major countries in Europe: 5%
- Australia: 3%
- Canada: 1%
- Others: 5%

(2016)

by Ministry of Land, Infrastructure, Transport and Tourism, Japan
China Outbound Market

- Million Travelers

- 2010: 57.4 million
- 2015: 120 million
- 2020 (estimated): 200 million

By CNTA
Unique Trends in Japan
1. Mobile First

But Apps Last??
Travel Search Queries by Country

- JPN
- KOR
- US
- UK
- THA
- IND
- IDN
- DEU
- CHN
- HK
- MYS
- SIN
- AUS
- UAE
- SAU
- QAT

by Google Japan – Jan-Jun 2016

Tablet
Smartphone
PC
Growth of Smartphone Users in Japan

2013/10-12: 36.01
2014/10-12: 45.28
2015/10-12: 52.41
2016/10-12: 58.97

126% increase from 2013 to 2014.
116% increase from 2014 to 2015.
113% increase from 2015 to 2016.
Travel.jp & Hotel.jp: Traffic by Devices

70%

As of December 2016
Mobile Share of Online Travel Gross Bookings by Market, 2016

Projected by PhoCusWright
Travel.jp: Mobile Browser vs. Mobile Apps

Diagram showing the dominance of Mobile Browser over Mobile Apps.
Ratios of Browsing Users vs. App. Users by Category

As of October 2016
by Nielsen

<table>
<thead>
<tr>
<th>Category</th>
<th>Browsing Users</th>
<th>App. Users</th>
</tr>
</thead>
<tbody>
<tr>
<td>auction</td>
<td>26%</td>
<td>68%</td>
</tr>
<tr>
<td>SNS</td>
<td>25%</td>
<td>62%</td>
</tr>
<tr>
<td>free video</td>
<td>30%</td>
<td>55%</td>
</tr>
<tr>
<td>comic</td>
<td>44%</td>
<td>52%</td>
</tr>
<tr>
<td>EC</td>
<td>41%</td>
<td>34%</td>
</tr>
<tr>
<td>news curation</td>
<td>58%</td>
<td>37%</td>
</tr>
<tr>
<td>gourmet</td>
<td>78%</td>
<td>15%</td>
</tr>
<tr>
<td>travel</td>
<td>82%</td>
<td>12%</td>
</tr>
<tr>
<td>news</td>
<td>91%</td>
<td>7%</td>
</tr>
<tr>
<td>meta-search</td>
<td>96%</td>
<td>3%</td>
</tr>
</tbody>
</table>

As of October 2016 by Nielsen
Internet Users in Japan

<table>
<thead>
<tr>
<th>Category</th>
<th>Number (Year)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Population</td>
<td>126m (2016)</td>
</tr>
<tr>
<td>Internet users</td>
<td>100m (2015)</td>
</tr>
<tr>
<td>Feature phone users</td>
<td>53m (2015)</td>
</tr>
<tr>
<td>Smart phone users</td>
<td>50m (2015)</td>
</tr>
<tr>
<td>Desktop users</td>
<td>51m (2015)</td>
</tr>
</tbody>
</table>
Average# of Apps Used Monthly

October 2014: 26
October 2015: 28 (+2)
October 2016: 29 (+1)

by Nielsen

Travel.jp | Hotel.jp | trip101 | allstay

Venture Republic
Usage Comparisons: Browsing vs. Apps.

As of October 2016

by Nielsen

<table>
<thead>
<tr>
<th>Category</th>
<th>Browsing</th>
<th>Apps</th>
<th>Ratio</th>
</tr>
</thead>
<tbody>
<tr>
<td>user (M)</td>
<td>55.74</td>
<td>58.12</td>
<td>× 1.0</td>
</tr>
<tr>
<td>usage time / person / day (min)</td>
<td>30</td>
<td>141</td>
<td>× 4.7</td>
</tr>
<tr>
<td>usage count / person / day</td>
<td>3.0</td>
<td>7.8</td>
<td>× 2.5</td>
</tr>
<tr>
<td>usage time / session (min)</td>
<td>9.8</td>
<td>18.1</td>
<td>× 1.8</td>
</tr>
</tbody>
</table>
2. Offline vs. Online

Do Clicks & Mortars Work?
Online Penetration

2015

- JAPAN: 39%
- EU: 47%
- US: 45%
- APAC: 31%

by PhoCusWright
## Gross Sales Volume by Travel Agencies

<table>
<thead>
<tr>
<th>Rank</th>
<th>Companies</th>
<th>JPY mil</th>
<th>YOY(%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>(株)ジェイティービー JTB</td>
<td>761,749</td>
<td>111.3</td>
</tr>
<tr>
<td>2</td>
<td>楽天(株) Rakuten</td>
<td>488,530</td>
<td>123.3</td>
</tr>
<tr>
<td>3</td>
<td>エイチ・アイ・エス HIS</td>
<td>428,497</td>
<td>98.8</td>
</tr>
<tr>
<td>4</td>
<td>(株)日本旅行 NTA</td>
<td>427,734</td>
<td>101.9</td>
</tr>
<tr>
<td>5</td>
<td>(株)JTB首都圏 JTB-Syutoken</td>
<td>323,834</td>
<td>99.2</td>
</tr>
<tr>
<td>6</td>
<td>(株)JTB国内旅行企画 JTB Japan Travel Corp</td>
<td>313,014</td>
<td>106.3</td>
</tr>
<tr>
<td>7</td>
<td>(株)阪急交通社 Hankyu Travel</td>
<td>295,363</td>
<td>88.8</td>
</tr>
<tr>
<td>8</td>
<td>(株)JTBワールドパケージャンズ JTB Worldvacations</td>
<td>220,603</td>
<td>89.7</td>
</tr>
<tr>
<td>9</td>
<td>(株)i. JTB i.JTB</td>
<td>208,337</td>
<td>117.1</td>
</tr>
<tr>
<td>10</td>
<td>ANAセールス(株) ANA Sales</td>
<td>204,999</td>
<td>97.5</td>
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<tr>
<td>11</td>
<td>近畿日本ツーリスト(株) KNT</td>
<td>200,365</td>
<td>100.6</td>
</tr>
<tr>
<td>12</td>
<td>(株)JTB西日本 JTB-West</td>
<td>182,549</td>
<td>115.3</td>
</tr>
<tr>
<td>13</td>
<td>(株)ジャルパック JALPAK</td>
<td>179,524</td>
<td>103.4</td>
</tr>
<tr>
<td>14</td>
<td>クラブツーリズム(株) Club Tourism</td>
<td>171,418</td>
<td>100.4</td>
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<tr>
<td>15</td>
<td>(株)JTBコーポレートセールス JTB Corporate Sales</td>
<td>165,174</td>
<td>104.8</td>
</tr>
<tr>
<td>16</td>
<td>東武トップツアー(株) Toubu Top tour</td>
<td>148,063</td>
<td>99.9</td>
</tr>
<tr>
<td>17</td>
<td>近畿日本ツーリスト個人旅行 KNT Individual Tour</td>
<td>130,885</td>
<td>97.9</td>
</tr>
<tr>
<td>18</td>
<td>(株)JTB中部 JTB-Chubu</td>
<td>116,988</td>
<td>101.8</td>
</tr>
<tr>
<td>19</td>
<td>(株)JTB九州 JTB-Kyusyu</td>
<td>107,395</td>
<td>97.3</td>
</tr>
<tr>
<td>20</td>
<td>(株)ジェイアール東海ツアーズ JR Tokai Tours</td>
<td>98,910</td>
<td>103.1</td>
</tr>
</tbody>
</table>
Travel Agencies’ Business in Japan

Breakdown of 1st Category Travel Agents* Gross Sales (2013)

**Overseas Trip**
- 50% Tour Packages
- 13% Large Scale Corporate Tours
- 37% Individually Arranged Trips

**Domestic (Overnight) Trip**
- 32% Tour Packages
- 19% Large Scale Corporate Tours
- 49% Individually Arranged Trips

(*)1st Category Travel Agents:
Companies that organize and sell overseas and domestic tours, and also make travel arrangements for the clients as agents.

by JATA
OTA Market Trend

Transaction Volume (2011)
$89.95M

$214.6M

RECRUIT 26.6, 29%
RAKUTEN TRAVEL 26.6, 30%
i.JTB 9.69, 11%
Others 24.02, 27%
Ikkyu 3.01, 3%

International OTA 31.8, 14.8%
Travel Agencies 45.7, 21.3%
Others 24.8, 11.6%
i.JTB 18.9, 8.8%
DeNA 4.6, 2.1%

+238.6%

by PhoCusWright
3. Loyalty
It Does Matter.
Case Study - Rakuten

Rakuten Ecosystem

108M

Rakuten Membership with Rakuten ID

Integrated transaction data base

Note: As of March 2016

By WIT Japan & North Asia
Loyalty Point Consortiums
4. Content

Is it King?
Japan’s New Travel Media
旅行を計画するなら、Travel.jpにご相談ください。
YoY +655%
Travel.jp Official Travel News Subscription Services on LINE

466,598 fans (as of Oct 2017)

Nov-16 Jan-17 Mar-17 Apr-17 Jun-17 Aug-17 Sep-17 Nov-17
Hong Kong to Hokkaido, Japan
Hong Kong to Hokkaido, Japan
北海道・名寄の「サンベリーむらおか」で日本最北のブルーベリー狩りを！

旭川から車で1時間半ほど北へ向かうとある名寄市。その名寄市内からさらに稚内方面へ4キロほど行ったところにある「サンベリーむらおか」では、日本最北のブルーベリー狩りを楽しむことができます。寒い中育ったブルーベリーは、味がギュッと凝縮されて濃厚でとても美味です。
旭川から車で1時間半ほど北へ向かうとある名寄市。その名寄市内からさらに稚内方面へ4キロほど行ったところにある「サンベリーむらおか」では、日本最大のブルーベリー狩りを楽しむことができます。寒い中育ったブルーベリーは、味がギュッと凝縮されていて濃厚でとても美味。
Venture Republic Group
Leading Travel Metasearch Company in Asia
Our Uniqueness
Our Unique Model

MetaSearch
- Flights
- Packages
- Hotels
- Private Accommodations
- Local activities

Content
- Destination Guide Articles
- Accommodation Guide Articles
- Private Accommodations
- Local activities
23,566 articles as of Oct 2017
140 is adding every week
500+ Travel Influencers/Bloggers
Our Unique Model to Build Travel focused Media

Professional Generated (eg. Guidebooks)

Influencer Generated

User Generated

Our Publishing Ecosystem
Our Unique Value Propositions

In Destination

Dreaming  Researching  Planning  Booking  Exploring  Sharing
User Profiles – Travel.jp Metasearch vs. Media
Front Runner
on Mobile Messaging Platform
Messenger Apps

- LINE: 220 MILLION (68 Million in Japan)
- TALK: 49 MILLION
- WA: 700 MILLION
- FB Messenger: 1 BILLION
- Snapchat: 1 BILLION
- Others: 150 MILLION

Population
- Japan: 127 MILLION
- South Korea: 50 MILLION
- China: 1.357 BILLION
Collaborations with Destinations & Travel Brands through Content
Our Projects with Destinations

ルフトハンザ ドイツ航空が女性や一人旅に評判な5つの理由

更新日：2016/12/29 11:54

国内3都市4空港に就航しているルフトハンザ ドイツ航空は、ヨーロッパへのフライトを持つ外資系エアラインの中でもサービスの良さやシックなイメージで、ファンの多いエアラインです。

また、近年プレミアムエコノミクラスが導入され、新たな快適さが話題になっています。ルフトハンザはなぜ評判が高いのか、航空ジャーナリストである筆者が詳しく紹介します。
Our Clients
Providing Unique Values to Travel Brands through Funnels

Phase 1
Tell stories of Destination / Travel Brand through articles/content

Phase 2
Funnel through to conversions on metasearch and clients’ websites
Case Studies - Lufthansa

Purpose: Improving awareness its premium economy class for women

Results: Tie-up campaign with premium economy class flight give away

PV: 57,000
Case Studies - Lufthansa

We have been able to drive “meaningful” traffic from search engines over the long period of time.

PV grown 10x!!
Case Studies – Hotel Okura

Purpose: Increasing traffic and booking to Hotel Okura Tokyo Bay and improving awareness of their winter events and winter suite room deals.

7,000 PV/per month
Case Studies – Akita Prefecture

DMO

Purpose: Increasing traffic and bookings to Akita prefecture and brand awareness of Masuda-cho, Yokote-city, Akita prefecture.

Results

8,000 PV/per month
Travel Influencers Asia – Marketplace connecting Travel Influencers & Travel Brands

TRAVEL INFLUENCERS ASIA

Matching FAM Trips to Travel Influencers

JOIN US

Already signed up? Login here
Suppliers Direct
Early Adapters of Private Accommodations
Airbnb and third party distribution – and so it begins again?

Airbnb has dipped its toe back in the waters of third-party distribution, almost a year to the day since it axed its original affiliate programme.

The global property-sharing giant has signed a deal this week with two Japanese travel search sites to allow its inventory to feature alongside other accommodation providers.

Visitors to both Travel.co.jp and Travelko will have access to the full Airbnb portfolio of three million products in 34,000 destinations in 191 countries, including 46,000 properties in Japan alone.
Trip101

Top 10 Airbnb Accommodations In Tokyo, Japan

- Central Shinjuku Park Apartment 702. Source: Airbnb.
- Ikebukuro Sakura. Source: Airbnb.
- Sky View Shinjuku Apartment 1310. Source: Airbnb.
- Shinjuku Room. Source: Airbnb.
- Shibuya Apartment. Source: Airbnb.
- Asakusa Explore. Source: Airbnb.
- Urban Tokyo House. Source: Airbnb.

More Items...

Top 10 Airbnb Accommodations In Tokyo, Japan


Tokyo needs no introduction. Renowned for its unbeatable cuisine, outrageous and trendy fashion, squeaky clean streets and the polite and friendly attitude of her people, Tokyo is arguably one of the world’s greatest cities. You’ll never run out of things to do here. Catch up with the latest fashion trends and taste unique creations in Shinjuku and Harajuku, or slow it down and explore the city’s vibrant history through its museums, gardens and temples. Be right in
Our Strong Footprint in In-Destinations
Mobile Use in Destinations

MOBILE VS DESKTOP TRAFFIC
Mobile Use in Destinations

2015/04/15 - 2015/04/22

REGULAR SEASON

JAPAN

2015/04/29 - 2015/05/06

PEAK SEASON

JAPAN
Instant Booking
Instant Booking Platform on Mobile Apps in Korea
An Unique Experiment to increase Ski Population
Need to Boost Domestic Travel Consumption

Inbound Sales are booming but Young Travelers are Decreasing (Population)

Need to Stimulate Young Travelers to Travel more!
Need to Boost Domestic Travel Consumption

Recruit, one of the biggest OTA in Japan, started a unique campaign to stimulate Young Travelers to participate in Winter Snow activities.

Started “Snow Magic!” campaign in 2011
What is “Snow Magic! 19”? How does it work!?

"Snow Magic! 19" is a campaign in which lift tickets become free with over 190 slopes throughout the country limited to 19 years old. It is a very grateful story to college students that any lift ticket of 5,000 yen a day will be free at any ski resort! Target of 2016/17 is 19 years old born April 2, 1997 ~ April 1, 1998! Prepare to go to the slopes now!
Need to Boost Domestic Travel Consumption
Need to Boost Domestic Travel Consumption

User's ski repeat rate exceeds 98%
Total user close to 1 million!
Need to Boost Domestic Travel Consumption

Items need to care about

(1) determine the timing to start to maximize the number of people attending and make effort to remain long in the snow industry.

(2) It will not be chosen forever unless consumers of future customers are given consumption habits. Conversely, leisure is attractive, so it will be a promising market if you have experiences.

(3) It is difficult to appeal directly to an unexperienced person, and it is easier for people who can ski even a little to invite inexperienced friends via SNS.

(4) It will not be realized without industry cooperation, sharing a sense of crisis is very important. It began at a timing that made it easier to unite.
Some Unique Ideas to increase traffic
Metasearch Revenue Model

Google Search (SEO&SEM) Need to Escape from Search Engine Addiction !?

Traffic x CVR x EPC = Revenue

APPs & Direct (Inc. SNS, Messaging, etc.)
Metasearch Revenue Model

How to Increase Google Search SEO Traffic!? (Still Addicted....)

10 most .... (e.g. amazing places to visit in Tokyo, etc.) Need contents => Trip101
Metasearch Revenue Model

How to Increase traffic from LINE messaging platform !?

Post Good Looking Contents Everyday
How to Increase APP install without spending money !?

Try D M O
What is DMO!? 

Display Mosaic Optimization 
Cover the best price (only one) field with mosaic. 
The best price will be shown only via a search through APP. 
The key is to optimize the mosaic field(s).
Thank You!

Contact

hiroyuki.nishimura@vrg.jp