Amadeus Journey of Me Insights
What Asia Pacific travellers want
1. Methodology
2. Introducing the Journey of Me
3. The 4 themes
4. Demographic overview: Who we surveyed
5. What Asia Pacific travellers want
   1. Know Me
   2. Inspire Me
   3. Connect Me
   4. Talk to Me
   5. Delight Me
   6. Care for Me
METHODOLOGY

The research, *Journey of Me Insights: What Asia Pacific travellers want*, was conducted in May 2017 in collaboration with YouGov. A total of 6,870 respondents from 14 markets in Asia Pacific that have travelled by plane in the last 12 months were sampled. The 14 markets include:

- Australia (500 respondents)
- China (1,200)
- Hong Kong (300)
- India (1,200)
- Indonesia (500)
- Japan (420)
- Korea (400)
- Malaysia (400)
- New Zealand (250)
- Philippines (400)
- Singapore (300)
- Taiwan (300)
- Thailand (400)
- Vietnam (300)
Amadeus believes that no two travellers are the same, and even more so, no two journeys will be the same. At the core of travelling is the creation of experiences that are innately ours.

There are an infinite number of elements that make up the travellers’ DNA. Varying factors may influence my travel experience but what defines the “Journey of Me” are my behaviours, feelings, attitudes, and coping mechanisms.

As travellers today become more savvy and better informed, travel and its elements of surprise, magic and wonder have become increasingly challenging to achieve.

Technology brings promise. Now, we have the opportunity to bring the magic back into travel. But only if we first understand what the traveller wants.

In today’s world of travel, every engagement point matters. Expectations have surpassed personalisation. Beyond relevance, travel providers must be timely and intuitive to shape each individual experience.

In this journey of ME, cultivating relationships and embracing travellers’ individuality should be the priority.
There are many Asias within Asia

The most startling observation from the study is that there is no consistent profile for the Asia Pacific traveller. Stark contrasts in behaviours, needs and preferences were observed across all geographic and demographic lines.

64% of Asia Pacific travellers would be willing to trade personal data for more relevant offers and personalised experiences but it must be carefully balanced against rising privacy concerns. Some boundaries must be maintained and at all times travel providers must respect and protect personal data and the need for privacy. And above and beyond adhering to legislation, travel players must be able to articulate ‘what’s the value?’ to get travellers to share their data.

Rather than the glossy pictures of travel brochures or the carefully curated Instagram feeds of celebrities, Asia Pacific travellers seek what’s genuine, and turn to their fellow travellers for inspiration. The research found that online booking and review sites, along with word of mouth, have the largest influence on Asia Pacific travellers’ trip planning. These were also ranked as the top three sources from which Asia Pacific travellers have received relevant travel recommendations.

In the world of travel, every engagement point matters. Beyond personalisation, connecting with travellers in a timely and intuitive manner is equally important. The good news is that the vast majority of travellers would be interested in receiving travel recommendations from the moment they consider a trip all the way up to while they are on the trip. But what recommendations they want, and how they want to receive it varies by country.

THE FOUR THEMES

In the course of this research, “Journey of Me Insights: What Asia Pacific travellers want” uncovered four themes that travel providers need to focus on:

1. There are many Asias within Asia

2. The personalisation-privacy paradox

3. Get real: Recommendations they can trust

4. The right content, through the right channel, at the right time
SO WHAT DO ASIA PACIFIC TRAVELLERS WANT?

KNOW ME and what I want, before I even want it

INSPIRE ME about the endless possibilities around travel and technology

CONNECT ME so I can stay in touch with what’s important to me

CARE FOR ME and keep me safe and secure

DELIGHT ME and bring the magic back into travel, every step of the way

TALK TO ME throughout the entire journey, but on my terms

TALK TO ME throughout the entire journey, but on my terms

Journey of Me

Know Me

Care for Me

Delight Me

Connect Me

Inspire Me

© 2016 Amadeus IT Group and its affiliates and subsidiaries
**KNOW ME**

_ Personalisation or privacy? 64% of APAC travellers are open to sharing personal information with travel service providers for more relevant offers and personalised services, with Indonesians being the most open (80%). Japanese travellers however, prefer privacy – 69% of them are not open to sharing their data.

_ Big screens vs small screens: Across APAC, laptops and desktops are still the most used device for trip research and booking. But there are anomalies. In Indonesia, more research and booking is done through mobile devices than on laptops/desktops. Furthermore, Indonesia and China are the only markets where booking trips through mobile is more commonplace than booking through PCs.

_ Recommendations that matter: Travellers in APAC find tips that help them save money the most useful (37%), especially those in Malaysia, New Zealand and the Philippines. Japan travellers however, prefer recommendations that can help make travel more comfortable (43%), while the top choice for Vietnamese travellers are tips that ensure their safety.

_ Who knows better: Online booking websites (50%), social networks (48%) and travel review sites (47%) are the top 3 channels that have sent travellers relevant recommendations. In markets like China and India, online booking websites are ranked even higher, while social networks dominate in Indonesia, the Philippines and Vietnam.

**INSPIRE ME**

_ Opportunities to inspire: In APAC, travellers tend to plan their trips during the weekends. In China and Taiwan however, travellers are more likely to plan their trip while on holiday. In Hong Kong, travel plans are typically made after work on weekdays (42%).

_ The influencers: People they know or people who are like themselves have the biggest influence on APAC travellers. Online booking or travel sites like Expedia or Skyscanner are the most influential (ranking score 1.2 out of 3), as are friends, family and colleagues (1.2 out of 3). Interestingly, Japanese travellers trust travel guides like Lonely Planet more so than other APAC travellers.

_ New technology: APAC travellers are most interested in an augmented reality mobile app containing interactive information about the history of a tourism site (ranking score 1.4 out of 3). However, travellers from Australia, India, New Zealand and Singapore demonstrate a higher interest in 360 degree interactive videos that would allow them to experience something they’d see on their trip. Interestingly, Vietnamese travellers exhibit a strong preference for virtual personal travel assistants.
CONNECT ME

- **Reasons to stay connected**: To access maps and location information (55%), share travel pictures and experiences with friends and family (54%), and to let people know they’re safe (53%). Chinese travellers are most likely to stay connected so that they can share travel pictures and experiences, while Indian travellers are more likely than others to stay connected so that they can meet new people using travel and social apps.

- **How to get connected**: Across all countries, Wi-Fi (71%) is the top choice for staying connected when travelling abroad. However, respondents from Korea show a stronger preference for using international roam-as-you-go services (56%) compared to other travellers. While Malaysian, Indonesian and Singaporean travellers have a higher preference than others for local SIM card purchased at the destination.

- **Apps that add value**: Facebook appears most often in the top 3 apps travellers use that add value to their trips. Google Maps also makes a strong showing. Local apps make an appearance for China, India, Indonesia and Vietnam’s top 3 lists with Ctrip, MakeMyTrip, Traveloka and Zelo.

TALK TO ME

- **A good time to ‘talk’**: While travellers are very open to receiving recommendations throughout the entire travel journey, interest levels fall from a high of 95% when first considering taking a trip, to planning the trip (94%) and making a booking (90%), to after finishing the trip (61%). The trend is consistent across every market with New Zealand and Singapore travellers having the lowest interest rate in receiving recommendations after finishing their trips.

- **“You can reach me via…”**: E-mail, say 35% of APAC respondents, which is the most popular channel compared to messaging services, travel company apps, social media or phone calls. Respondents in Australia (62%) and New Zealand (70%) very strongly favour this channel, a less-intrusive form of communication. While, in China, where WeChat has a huge presence, travellers prefer receiving updates via messaging services (41%). Interestingly, Thai travellers most want to receive updates or recommendations about their trip through social media (47%).
Speak my language: Finding service staff and tour guides who speak a language that travellers can understand is extremely important to travellers from Australia, China, India, New Zealand, Philippines and Singapore. However, travellers from Hong Kong, Indonesia, Korea, Taiwan, Thailand and Vietnam don’t seem to care much for this.

New world, new options: Indian travellers have really embraced the sharing economy, with 72% of them using such services for getting around during a trip ‘often’ or ‘very often’. 48% of them use sharing economy accommodation services ‘often’ or ‘very often’. On the other end, more than two-thirds of Japanese travellers have never used a sharing economy service during their travels.

Great expectations: 14% of APAC travellers say that a travel provider has never exceeded their expectations. Amongst those who were luckier, hotels and booking sites have a higher hit rate than other service providers like airlines or travel agents. 29% and 25% of Japanese and Hong Kong travellers say a travel provider has never exceeded their expectations.

Travel stoppers: Amongst all averse events listed, a recent terror attack is most likely to negatively impact the likelihood of people travelling to a certain destination (62%). Chinese, Korean, Filipino and Vietnamese travellers show a higher sensitivity to averse events across the board.

Safety updates: Friends/family (49%) and booking sites (49%) are the top 2 sources from which travellers wish to receive safety or security updates, followed closely by transport providers (46%), travel agents (45%) and embassies/governments (45%). Respondents from Singapore have a higher reliance on their embassy/government (74%) and immigration authorities (52%), whereas Koreans place more trust in travel agents (57%) and tour operators (47%).
Demographic overview

Who we surveyed
DEMOGRAPHIC OVERVIEW
A snapshot

Gender:
- Male: 57%
- Female: 43%

Age:
- 35-44: 21%
- 35-44: 21%
- 25-34: 31%
- 18-24: 11%
- 55+: 20%

Travel frequency:
- 1-2 trips: 55%
- 3-7 trips: 38%
- 8-12 trips: 5%
- 13 or more trips: 2%

Primary reason for travel:
- Leisure: 70%
- Business: 26%
- Other: 4%

Leisure: 70%
Business: 26%
Other: 4%
Know Me

and what I want, before I even want it
Q1. When it comes to researching your trip and making a booking, which device(s) do you use most? Select all that apply.

Laptops or desktop computers are the devices Asia Pacific travellers use the most for researching their trips and make bookings. However, in Indonesia this trend is reversed. More Indonesians research trips on mobile (69%) and book through mobile (62%) than on laptops or desktops (60% and 56% respectively). Chinese travellers show the highest preference for booking trips through mobile (66%) compared to all other travellers. In Australia, Japan, New Zealand the gaps between laptop/desktop and mobile are the largest, with 78 - 92% choosing the former compared to 11 - 33% for the latter.
Millennial travellers are much more likely to use these mobile devices to research and book trips compared to older generations. Perhaps unsurprisingly, baby boomers show higher preference for using intermediaries like travel agencies to help them plan and book trips.
Q2. When do you usually book your accommodation for a trip?

Travellers in APAC show diverse preferences for when they typically book accommodation. The majority of Japanese and Korean travellers book their accommodation at the same time as booking their flight. Travellers from Philippines and Vietnam mostly prefer to book accommodation before they book their flights or transport. While Hong Kong, Malaysian and Singaporean travellers favour booking accommodation only after they’ve booked their flights. Spontaneous behaviour is rare, with only 2% of surveyed travellers booking their accommodation only after they arrive at the destination.

**When do travellers book accommodation**

- In advance of booking the flight/transport: 35%
- At the same time when I’m booking the flight/transport: 36%
- After booking the flight/transport, but before departure: 27%
- After landing or reaching the destination: 2%

**In advance of booking the flight/transport**

- Philippines: 57%
- Vietnam: 53%
- India: 48%
- Thailand: 47%
- Indonesia: 43%

**At the same time when I’m booking the flight/transport**

- Japan: 68%
- Korea: 61%
- Taiwan: 46%
- New Zealand: 42%
- Australia: 37%
- China: 36%

**After booking the flight/transport, but before departure**

- Hong Kong: 45%
- Malaysia: 42%
- Singapore: 41%
Travellers that travel mostly for business have a stronger preference for booking their accommodation prior to booking their flights, while leisure travellers prefer to book accommodation either at the same time or after booking their flights.

When do travellers book accommodation

- **In advance of booking the flight/transport**: 32% for business, 43% for leisure
- **At the same time when I’m booking the flight/transport**: 34% for business, 37% for leisure
- **After booking the flight/transport, but before departure**: 19% for business, 29% for leisure
- **After landing or reaching the destination**: 2% for business, 3% for leisure
Q3. When you travel for leisure, what types of travel recommendations do you find most useful? Please select the top two.

Recommendations that help them save money are the most popular (37%) amongst APAC travellers, particularly so for travellers in Malaysia, New Zealand and the Philippines. Japanese travellers seem less concerned about money saving (19%), preferring to receive tips that make travel more comfortable (43%). Interestingly, male travellers show a stronger preference than females for recommendations that make travel more comfortable, as well as those that help them save time. The most useful recommendations for female travellers are those that help them save money.

<table>
<thead>
<tr>
<th>Most useful recommendations for leisure travel</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help me save money</td>
<td>37%</td>
</tr>
<tr>
<td>Make my travel more comfortable</td>
<td>29%</td>
</tr>
<tr>
<td>Help me save time</td>
<td>17%</td>
</tr>
<tr>
<td>Help identify the best sightseeing options</td>
<td>28%</td>
</tr>
<tr>
<td>Ensure my safety</td>
<td>27%</td>
</tr>
<tr>
<td>Help me plan my itinerary</td>
<td>27%</td>
</tr>
<tr>
<td>Expose me to new experiences</td>
<td>24%</td>
</tr>
</tbody>
</table>
(Continued) Q3. When you travel for leisure, what types of travel recommendations do you find most useful?

Top 3 preferred recommendations

<table>
<thead>
<tr>
<th>Australia</th>
<th>China</th>
<th>Hong Kong</th>
<th>India</th>
<th>Indonesia</th>
<th>Japan</th>
<th>Korea</th>
<th>Malaysia</th>
<th>New Zealand</th>
<th>Philippines</th>
<th>Singapore</th>
<th>Taiwan</th>
<th>Thailand</th>
<th>Vietnam</th>
</tr>
</thead>
<tbody>
<tr>
<td>#1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Help me save money</td>
<td>Help me identify the best of sightseeing options</td>
<td>Help me save money</td>
<td>Ensure my safety</td>
<td>Help me save money</td>
<td>Make my travel more comfortable</td>
<td>Make my travel more comfortable</td>
<td>Help me save money</td>
<td>Help me save money</td>
<td>Help me save money</td>
<td>Help me save money</td>
<td>Help me save money</td>
<td>Ensure my safety</td>
</tr>
<tr>
<td>#2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Help me identify the best of sightseeing options</td>
<td>Ensure my safety</td>
<td>Help me plan my itinerary</td>
<td>Help me save money</td>
<td>Make my travel more comfortable</td>
<td>Help me identify the best of sightseeing options</td>
<td>Expose me to new experiences</td>
<td>Help me plan my itinerary</td>
<td>Help me identify the best of sightseeing options</td>
<td>Ensure my safety</td>
<td>Help me plan my itinerary</td>
<td>Help me plan my itinerary</td>
<td>Help me identify the best of sightseeing options</td>
</tr>
<tr>
<td>#3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Expose me to new experiences</td>
<td>Help me save money</td>
<td>Help me identify the best of sightseeing options</td>
<td>Make my travel more comfortable</td>
<td>Ensure my safety</td>
<td>Help me plan my itinerary</td>
<td>Help me plan my itinerary</td>
<td>Help me identify the best of sightseeing options</td>
<td>Expose me to new experiences</td>
<td>Make my travel more comfortable</td>
<td>Help me identify the best of sightseeing options</td>
<td>Help me identify the best of sightseeing options</td>
<td>Help me identify the best of sightseeing options</td>
</tr>
</tbody>
</table>
Q4. When you travel for leisure, which of these platforms have sent you relevant travel recommendations (e.g. about destinations, hotels, things to do, activities, places to eat)? Select all that apply

Online booking websites (50%), social networks (48%) and travel review sites (47%) are the top 3 channels from which APAC travellers have received relevant travel recommendations. In China and India, where local online travel players dominate, online booking websites fare even better (62% and 60% respectively). In Indonesia, Philippines and Vietnam, social networks come out at the top.

Platforms that have sent travellers relevant travel recommendations

- Airline website or app: 29%
- Hotel website or app: 34%
- Travel agency: 32%
- Online booking websites (e.g. Expedia, Goibibo): 50%
- Hotel concierge: 15%
- Airline in-flight magazine: 18%
- Social network (e.g. friends/family): 48%
- Travel review site (e.g. TripAdvisor): 47%
- Travel blogs/forums: 34%
- None of the above: 4%
KNOW ME

Q5. In general, how open are you to sharing personal information with travel service providers such as booking websites, airlines, hotels etc., in return for more relevant offers or personalised services?

64% of travellers in APAC are open to sharing personal information with travel service providers. Travellers from Indonesia (80%), Thailand (79%) and Taiwan (78%) are the most open. Japan is the only country where the majority of their travellers (69%) are not open to sharing their personal information with travel providers. Interestingly, it seems the older the traveller, the more open they would be to sharing their data.

Openness to sharing personal information with travel providers

- Not at all open: 8%
- Somewhat not open: 28%
- Somewhat open: 49%
- Very open: 15%
Inspire Me
about the endless possibilities around travel and technology
INSPIRE ME

Q6. When do you do most of your travel planning?

Across APAC, more travel planning is done on the weekends than at any other time. In China and Taiwan however, travellers are more likely to plan their trip while on holiday (41%, 44%). In Hong Kong, travel plans are typically made after work on weekdays (42%).
(Continued) Q6. When do you do most of your travel planning?

Travellers that travel mostly for business naturally do most of their travel planning at work during work hours (30%). Leisure travellers however, are far less likely to plan travel at work (8%) and most likely to do so during the weekends (35%).

<table>
<thead>
<tr>
<th>Scenario</th>
<th>For business</th>
<th>For leisure</th>
</tr>
</thead>
<tbody>
<tr>
<td>When commuting from one place to another</td>
<td>3%</td>
<td>8%</td>
</tr>
<tr>
<td>During the weekends</td>
<td>25%</td>
<td>35%</td>
</tr>
<tr>
<td>While at work</td>
<td>8%</td>
<td>30%</td>
</tr>
<tr>
<td>Weekdays, after work</td>
<td></td>
<td>19%</td>
</tr>
<tr>
<td>While on holiday</td>
<td></td>
<td>24%</td>
</tr>
<tr>
<td>Others</td>
<td>1%</td>
<td>28%</td>
</tr>
</tbody>
</table>

When travellers plan their travels
Q7. When it comes to planning your trip (looking for destinations, places to stay, activities to do etc.), which three of the following influence you the most?

*Rank in order of influence – from highest to lowest*

Amidst the cacophony of all the information they receive, travellers turn to recommendations from people they know or from people that are like themselves. Online booking or travel sites (1.2 out of 3), which often feature real traveller ratings and reviews, have the most influence, as well as word of mouth recommendations from friends, family or colleagues (1.2 out of 3). While there are variations from market to market, each follows a similar pattern. In the Philippines and Vietnam, word of mouth (1.6, 1.5 respectively) tops the list, while travellers from Australia and Singapore rely heavily on traveller reviews (1.3, 1.4 respectively). Interestingly, while the large majority of travellers are not strongly influenced by content they see on social media, Thai travellers are the exception, with a ranking score of 1.2.

<table>
<thead>
<tr>
<th>Sources that influence travellers’ trip planning</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel blogs or forums</td>
<td>0.6</td>
</tr>
<tr>
<td>Traveller reviews (e.g. on sites like Tripadvisor)</td>
<td>1</td>
</tr>
<tr>
<td>Social Media (general or sponsored content on Facebook, Twitter etc.)</td>
<td>0.6</td>
</tr>
<tr>
<td>Brochures</td>
<td>0.3</td>
</tr>
<tr>
<td>Travel agents</td>
<td>0.5</td>
</tr>
<tr>
<td>Online booking or travel sites (e.g. Expedia, Skyscanner etc)</td>
<td>1.2</td>
</tr>
<tr>
<td>Friends/Family/Colleagues (word of mouth)</td>
<td>1.2</td>
</tr>
<tr>
<td>Travel guides (e.g. Lonely Planet, Discovery)</td>
<td>1.2</td>
</tr>
<tr>
<td>Celebrities or social media influencers</td>
<td>0.1</td>
</tr>
</tbody>
</table>

*Scoring: Rank 1=3, rank 2=2, rank 3=1, otherwise=0, average score of each options is presented*
(Continued) Q7. When it comes to planning your trip (looking for destinations, places to stay, activities to do etc.), which three of the following influence you the most?

Millennial travellers are more likely to be influenced by content they see on social media than travellers from older generations. Baby boomers on the other hand, tend to be more influenced by travel agents and their social networks than younger travellers. For those who travel less frequently (only 1-2 trips in the last 12 months), there was a stronger tendency to trust advice from friends and family.
Q8. Rank the following new technologies from highest to lowest, based on your interest in using them for planning or while on a trip.

An augmented reality mobile app that delivers digital overlays containing interactive information about the culture or history of a tourist site (score 1.4 out of 3) interests APAC travellers the most compared to other new technologies listed. However, travellers from Australia, India, New Zealand and Singapore demonstrated a higher interest in 360 degree interactive videos. It is also noteworthy that Vietnamese respondents have a strong preference for virtual personal travel assistant technology.

New technologies travellers are most interested in

- Virtual Reality e.g. via a headset or Google Cardboard
- An augmented reality mobile app containing interactive information
- A 360 degree interactive video
- A chat bot service to answer FAQs
- A virtual personal travel assistant or concierge

Scoring: Rank 1=3, rank 2=2, rank 3=1, otherwise=0, average score of each options is presented.
Connect Me
so I can stay in touch with what’s important to me
Q9. Why do you want to stay connected when you travel?

Accessing maps and location information (55%), sharing pictures and experiences with friends and family (54%), as well as letting people know their safety status (53%) are the top 3 reasons why travellers want to stay connected on trips. The countries with the most travellers wanting to share pictures and experiences while travelling are the Philippines (64%), China (63%) and Taiwan (63%). In contrast, only 23% of Japanese travellers care for the same. Travellers from India (46%) and Vietnam (44%) are most likely to want to stay updated with work, indicating a reluctance to switch off whilst on holiday. Yet they are also the travellers that are most likely to want to stay connected in order to meet new people through travel and social apps.

Why travellers want to stay connected when travelling

- Keep up to date with what’s happening to the world (43%)
- Stay updated with work/business (32%)
- Share pictures and experiences with friends/family (54%)
- Meet new people using travel/social apps (28%)
- Use convenience applications (e.g. Uber, Foodpanda, Grab, Zomato etc) (34%)
- Research things to do at the destination (49%)
- Translate local language (35%)
- Access maps and location information (55%)
- Let people know I’m safe (53%)
- Prefer to disconnect completely when traveling (2%)
Q10. How do you choose to stay connected when you are travelling abroad? 
*Select all that apply*

Most respondents from APAC use Wi-Fi (71%) to stay connected when they are travelling abroad. Respondents from Korea have a high preference towards using international roam-as-you-go services (56%) whilst respondents from Malaysia, Indonesia and Singapore prefer to use a local sim card purchased at the destination (54%, 58%, 56% respectively).
Q11. Please list the top three mobile apps you use while travelling that add value to your trip. If you do not use any apps while travelling, enter ‘NA’
Talk to Me throughout the entire journey, but on my terms
Q12. How interested are you in receiving travel-based recommendations (e.g. things to do, places to visit or eat etc.) in the following stages of your travel?

While travellers are very open to receiving recommendations throughout the entire travel journey, there is a decline in interest for receiving travel-based recommendations as the trip progresses, falling from a high of 95% when travellers are first considering taking a trip (95%), to a low of 61% once they have finished the trip. This trend is consistent across all markets, although New Zealand and Singapore travellers are least likely to welcome recommendations once their trips come to an end (38% and 36% respectively).

* Percentage of respondents choosing 'Interested' and 'Very interested' for each option is presented.
Q13. Which of the following do you prefer to use when it comes to receiving updates or recommendations about your trip?

35% of respondents prefer to receive updates or recommendations about their trips by email, which is the most popular channel in APAC. For more mature markets, preference towards e-mail, a less intrusive form of communication, tends to be much stronger. 62% of Australians and 70% of New Zealanders prefer e-mail. On the contrary, in China, where WeChat has a huge presence, 41% of travellers prefer receiving updates via messaging services. Interestingly, Thai travellers most want to receive updates or recommendations about their trip through social media (47%). Infrequent travellers also tend to favour e-mail communications, while more frequent travellers choose apps by travel companies.

Channels through which travellers prefer to receive updates & recommendations about their trip

- Email: 35%
- Social Media: 19%
- Apps by travel companies: 19%
- Messaging service e.g. WhatsApp, Line: 20%
- Phone call: 7%
Delight Me
and bring the magic back into travel, every step of the way
Q14. How often do you use the following apps or services?

In APAC, more than 65% of respondents have used sharing economy apps and services, either for getting around (75%) or for accommodation (68%) during a trip. Indian travellers have really embraced the sharing economy, with 72% of them using such services for getting around during a trip ‘often’ or ‘very often’. 48% of them use sharing economy accommodation services ‘often’ or ‘very often’. Travellers from China are treading carefully – while the majority have used sharing economy services, most fall within the ‘seldom’ bucket. On the other end of the spectrum, more than two-thirds of Japanese and over half of New Zealand travellers have never used sharing economy apps or services during a trip.

Applications for getting around during a trip
e.g. Uber, Grab, Lyft, Ola, Didi, Chuxing

- Never: 25%
- Seldom: 39%
- Often: 27%
- Very Often: 10%

Applications or services for stays during a trip
e.g. Airbnb, Couchsurfing, etc.

- Never: 32%
- Seldom: 39%
- Often: 22%
- Very Often: 7%
(Continued) Q14. How often do you use the following apps or services?

As expected, millennials are the most likely age group to have used sharing economy apps. Interestingly, business travellers are more likely to use ridesharing apps (49%) than leisure travellers (31%), as well as accommodation apps (38% of business travellers vs. 27% of leisure travellers).

There is also a notable difference in sharing economy adoption for those travelling more frequently compared to those who only travel once or twice per year. While only 28% of infrequent travellers use ridesharing apps and only 21% use accommodation apps, these figures more than double for travellers that take eight or more trips per year.
Q15. Why did you choose to use these sharing economy services and apps? *Select all that apply*

For all markets, ease of use and cost saving are the top reasons for using sharing economy apps, both for getting around during trips as well as for accommodation.
Q16. When you travel, how important is it for you to find each of the following at your destination?

Respondents’ priorities vary enormously from country to country, with language expectations a particularly polarising point for travellers. Finding service staff and tour guides who speak a language that travellers can understand is extremely important to travellers from Australia, China, India, New Zealand, Philippines and Singapore. However, travellers from Hong Kong, Indonesia, Korea, Taiwan, Thailand and Vietnam don’t seem to care much for this. (see next slide)

% of travellers that say it’s important to find the following at destination

- Food & beverage from your home country: 36%
- Service staffs who speak your language: 47%
- Tour guides who speak your language: 46%
- Religious facilities: 32%
- Newspaper/TV programs in your language: 40%

*Percentage of respondents choosing ‘Somewhat important’ and ‘Very important’ for each option is presented.*
DELIGHT ME

(Continued) Q16. When you travel, how important is it for you to find each of the following at your destination?

% of respondents who think it’s important to find service staff who speak a language they understand

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>70%</td>
</tr>
<tr>
<td>China</td>
<td>73%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>4%</td>
</tr>
<tr>
<td>India</td>
<td>73%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>4%</td>
</tr>
<tr>
<td>Japan</td>
<td>22%</td>
</tr>
<tr>
<td>Korea</td>
<td>6%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>47%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>76%</td>
</tr>
<tr>
<td>Philippines</td>
<td>78%</td>
</tr>
<tr>
<td>Singapore</td>
<td>84%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>9%</td>
</tr>
<tr>
<td>Thailand</td>
<td>8%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>3%</td>
</tr>
</tbody>
</table>

% of respondents who think it’s important to find tour guides who speak a language they understand

<table>
<thead>
<tr>
<th>Country</th>
<th>% of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>68%</td>
</tr>
<tr>
<td>China</td>
<td>72%</td>
</tr>
<tr>
<td>Hong Kong</td>
<td>9%</td>
</tr>
<tr>
<td>India</td>
<td>71%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>6%</td>
</tr>
<tr>
<td>Japan</td>
<td>21%</td>
</tr>
<tr>
<td>Korea</td>
<td>8%</td>
</tr>
<tr>
<td>Malaysia</td>
<td>46%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>65%</td>
</tr>
<tr>
<td>Philippines</td>
<td>72%</td>
</tr>
<tr>
<td>Singapore</td>
<td>72%</td>
</tr>
<tr>
<td>Taiwan</td>
<td>12%</td>
</tr>
<tr>
<td>Thailand</td>
<td>11%</td>
</tr>
<tr>
<td>Vietnam</td>
<td>2%</td>
</tr>
</tbody>
</table>
Q17. Based on your past travel experiences, which of the following travel service providers have impressed you and exceeded your expectations the most?

14% of APAC travellers say that a travel provider has never exceeded their expectations. Amongst those who were luckier, hotels and booking sites have a higher hit rate than other service providers like airlines or travel agents. The exception is in Vietnam, where travellers are most likely to have been impressed by tour operators (31%). 29% and 25% of Japanese and Hong Kong travellers respectively say a travel provider has never exceeded their expectations.

Travel service providers that have impressed travellers and exceeded expectations the most

- Airlines: 15%
- Hotel or accommodation providers: 24%
- Booking sites: 23%
- Travel agent: 13%
- Tour operators: 11%
- A travel provider has never exceeded my expectations: 14%
Q18. Briefly share how travel providers exceeded your expectations

“Thanks to our travel provider, we don’t have to go to the booking counters at the airports or train stations, saving us time and giving us a better price comparison on the same platform.”

“I used Airbnb which was an amazing experience! Our hosts were so friendly and I had an awesome time during my trip. I really liked the idea behind Airbnb.”

“For me, when a travel provider remembers my name and personal preferences, that is good service.”

“Musafir.com is a very good site and helps you customize your itinerary, tweaking it according to your expectations.”

“The information and experiences of travellers posted on TripAdvisor has been a great help for me when booking my trip.”

“Individual staff can make a real difference by providing local information and showing enthusiasm.”

“Some airlines can make travel a special experience through their frequent flyer programs and by offering discounts.”

“Expedia was extremely helpful when our airline cancelled our flight.”
Care for Me
and keep me safe and secure
CARE FOR ME

Q19. On a scale of 1 – 5 (1 – no effect at all, 2 – a slight effect, 3 – somewhat less likely to travel, 4 – very unlikely to travel, 5 – I would not travel), how much would each of the following affect your likelihood to travel to a certain destination?

Amongst all averse events listed, a recent terror attack is most likely to negatively impact the likelihood of people travelling to a certain destination (62%) particularly amongst Filipino (78%), Korean (74%), Chinese (69%) and Vietnamese (69%) travellers.

Chinese, Korean, Filipino and Vietnamese travellers show a higher sensitivity to averse events across the board.

* Percentage of respondents assigning score of 4-5 for each option is presented.
**CARE FOR ME**

**Q20. From whom would you prefer to receive safety or security updates at the destination? Select all the apply**

Friends/family (49%) and booking sites (49%) are the top 2 sources from which travellers wish to receive safety or security updates, followed closely by transport providers (46%), travel agents (45%) and embassies/governments (45%). Respondents from Singapore have a higher reliance on their embassy/government (74%) and immigration authorities (52%), whereas Koreans place more trust in travel agents (57%) and tour operators (47%).

<table>
<thead>
<tr>
<th>Preferred sources of safety or security updates</th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel agent</td>
<td>45%</td>
</tr>
<tr>
<td>Booking site</td>
<td>49%</td>
</tr>
<tr>
<td>Transport providers</td>
<td>46%</td>
</tr>
<tr>
<td>Hotel</td>
<td>41%</td>
</tr>
<tr>
<td>Tour operator</td>
<td>38%</td>
</tr>
<tr>
<td>Immigration/border security</td>
<td>36%</td>
</tr>
<tr>
<td>Embassy/government</td>
<td>45%</td>
</tr>
<tr>
<td>Friends/family</td>
<td>49%</td>
</tr>
<tr>
<td>Your employer in case of business trip</td>
<td>16%</td>
</tr>
</tbody>
</table>
Thank you!