Travel Confidence Index 2023

Unravelling the Diversity of Asia-Pacific Travellers

Regional Report
I am thrilled to present Booking.com’s Asia-Pacific Travel Confidence Index for 2023, yet another significant milestone in our relentless pursuit of understanding the ever-changing travel behaviours and preferences of travellers around the world.

This research holds immense importance as it delves into the intricate tapestry of the Asia-Pacific (APAC) travel landscape — a region that has emerged as a powerhouse in the travel sector, captivating millions of travellers with its diverse cultures, breathtaking landscapes and vibrant economies.

The region not only enthralls with its cultural richness and natural beauty but also stands resilient amidst prevailing macroeconomic realities. Despite complex global challenges, including inflation, geopolitical instability, climate change and supply chain disruptions, this year’s research uncovers a striking paradox: a remarkable 73% of APAC travellers maintain unwavering optimism for their future travel plans in the next 12 months, while over half (53%) have no intention of postponing their travel plans. This unwavering spirit of adventure and desire to create lasting memories through travel seems to outweigh any financial concerns, reinforcing the region’s resilience and its position as a driving force in the global travel ecosystem.

At Booking.com, our mission is to make it easier for everyone to experience the world. We understand the importance of adapting to the economic climate while empowering travellers to explore and experience the wonders of travel. In 2023, we continue to offer the widest choice, excellent value and a seamless booking experience for travellers across the globe. It provides simple, convenient and cost-effective options for travellers to embark on their journeys, even amidst economic uncertainties.

This year’s Index unveils the heart and soul of APAC travel, providing invaluable insights into the mindset and behaviours of travellers who have become the undisputed driving force behind its rapid growth. I invite you to immerse yourself in the 2023 Report to thoroughly explore, understand and unpack the vibrant opportunities this exciting region has to offer.

Laura Houldsworth, Managing Director APAC, Booking.com
Executive Summary

Booking.com’s 2023 edition of the APAC Travel Confidence Index (TCI) illuminates a remarkable journey that lies ahead for the Asia-Pacific (APAC) region, as it paves the way to reclaim its position as the world’s largest travel region by 2025\(^1\).

Through an in-depth survey of over 8,000 individuals across 11 markets and territories, this report offers invaluable insights into the mindsets of APAC travellers and the profound impact of economic and global uncertainties on their travel decisions.

The study also unveils distinct traveller personas, each with their unique motivations and priorities. From the Conscious Explorers who actively seek eco-friendly and sustainable travel options to the Comfort Seekers that prioritise both convenience and indulgence, these personas represent a tapestry of diverse aspirations and values, that help guide travel providers with curating truly personalised and enriching experiences that resonate with the desires of today’s discerning travellers.

Yet, as APAC emerges as a global travel powerhouse, it recognises the pressing need to lead with sustainability at its core. Travellers across the region are increasingly aware of the urgency to make mindful choices that align with their environmental values even as they face the challenge of balancing cost considerations and sustainable options. This presents a unique opportunity for travel providers to champion sustainability and offer accessible and affordable alternatives that allow travellers to tread lightly without compromising on their dreams of exploration.

In this report, the TCI 2023 will showcase the untapped potential of the APAC region, and unveil the varied opportunities that will empower both travellers and travel providers alike as we step into the next era of travel.

\(^1\) Phocuswright Research, Asia-Pacific Travel Market Report 2021-2025, February 2023
Methodology

Research commissioned by Booking.com and independently conducted by Milieu Insight among a sample of 8,800 respondents across 11 markets and territories across APAC (800 each from Australia, China Mainland, Hong Kong SAR, India, Japan, New Zealand, Singapore, South Korea, Taiwan, Thailand, Vietnam).

In order to participate in this survey, respondents had to be 18 years of age or older.

The study computed for a **Index** which was based on specific metrics such as willingness to travel, potential travel spend, duration, number of intended trips, and notably, travel propensity given the current macroeconomic state. Other areas that the study explored are travel and booking considerations, views on sustainability, and other market-specific questions.

Rankings were determined using a two-axis framework, which evaluated travel confidence and sustainability interest across APAC, based on the positions of markets above or below the zero point on each axis. Placement on the axes reflect scores that are relative to other markets and are not normative - this means that there is no standard cut off for scores to be considered as ‘high’ or ‘low’. Instead, these rankings provide comparative insights into the varying levels of sustainability interest and travel confidence across the included markets.

The survey was taken online and took place between March 29 and April 7, 2023.
The Index

Mapping travel confidence and sustainability interest across Asia-Pacific
Travel Confidence Index 2023

2023 Ranking

#1: Hong Kong SAR
#2: India
#3: China Mainland
#4: Singapore
#5: Taiwan
#6: Australia
#7: New Zealand
#8: Korea
#9: Japan
#10: Vietnam
#11: Thailand

Plots positioned further to the right indicate higher relative travel confidence, while plots placed higher up reflect greater relative sustainability interest. The positioning reflects scores relative to other markets and should not be interpreted as an absolute measure of confidence or interest.
About The Personas

**Mindful Voyagers**
Low travel confidence
High sustainability interest

These travellers have a deliberate and thoughtful travel approach, driven by their sense of responsibility to the environment and desire to help local communities. However, they often experience anxieties in unfamiliar environments and actively seek resources to overcome travel concerns and gain confidence.

**Conscious Explorers**
High travel confidence
High sustainability interest

These travellers actively pursue eco-friendly and sustainable travel. They are passionate about exploring while minimising environmental impact. They engage in ecotourism, stay at sustainable accommodations, and support local communities to align with their values.

**Homebound Pragmatists**
Low travel confidence
Low sustainability interest

These travellers prefer practical travel and staying close to home. They prioritise convenience, efficiency, and optimising time and resources. They seek seamless travel experiences that are well-organised and efficient, making the most of their limited time and resources.

**Comfort Seekers**
High travel confidence
Low sustainability interest

These travellers prioritise comfort and convenience. They seek indulgent experiences and accommodations with maximum relaxation. They value personalised services, high-quality amenities, and prioritise comfort over sustainability in their travel decisions.
Travel Confidence Metrics

Looking back at travel in the last 12 months
VN and IN travellers embarked on the most journeys as the region reopened its borders, while their counterparts from JP ventured the least.

Planning for travel in the next 12 months
IN and HK travellers are brimming with optimism about their future travel plans, while JP travellers continue to exercise caution.
Number of trips

Over half of travellers in APAC intend to maintain, if not increase, the number of trips they take this year compared to last year, especially those from HK, JP and CN.

<table>
<thead>
<tr>
<th>Country</th>
<th>Percentage</th>
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<tbody>
<tr>
<td>HK</td>
<td>74%</td>
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<td>JP</td>
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<td>CN</td>
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<td>KR</td>
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<td>VN</td>
<td>42%</td>
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<td>TH</td>
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</table>

Travel expenditure

Similarly, over half (59%) of APAC travellers intend to maintain, if not increase, their travel budget this year, particularly those from HK, CN and JP.

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Length of travel

Travellers from HK, JP and CN are inclined to have the same or longer travel durations this year, compared to the previous year.

Proportion of international travel

Travellers from HK, SG and JP expect to take the same or more international trips this year, compared to the previous year.

- **HK**: 84%
- **SG**: 78%
- **JP**: 69%
- **TW**: 68%
- **KR**: 65%
- **AU**: 63%
- **NZ**: 62%
- **IN, TW**: 57%
- **CN**: 52%
- **TH**: 46%
- **VN**: 34%

**APAC Average**: 62%
Opting for luxurious travel
HK, JP and KR travellers are most likely to opt for equal or more luxurious travel this year.

Postponing travel due to the economy
Over half of travellers in the region, particularly those from AU, SG and NZ, have no intentions to postpone any of their travel plans due to the current economy.

Importance of travel post COVID-19
IN and HK travellers feel most strongly about leisure travel being important to them, following the COVID-19 pandemic.
Confidence to manage travellers amid a COVID-19 resurgence

Travellers from CN, IN and VN have the most confidence in their markets’ ability to effectively manage international travellers in the event of potential COVID-19 resurgences.

Confidence in tourism infrastructure for international travel

Similarly, CN, IN and VN are also the most confident in their markets’ tourism infrastructure to welcome and accommodate international travellers.
Sustainability Interest Metrics

Spending on sustainable travel
Travellers from JP, JK and TW demonstrate the strongest willingness to spend the same or more on sustainable options this year.

IN, VN and CN travellers are the most keen to prioritise sustainable travel.
Prioritising sustainability over variety

Travellers from VN, IN and CN demonstrate the strongest preference for fewer choices as long as there are sustainable options.

- VN (73%)
- IN (69%)
- CN (61%)
- TW (45%)
- TH (39%)
- HK (52%)
- KR (36%)
- AU (26%)
- NZ, JP, SG (18%)
Travel Habits

Understanding travel behaviours, preferences and concerns across Asia-Pacific
When asked to choose the top statements that they strongly associate with travel, **1 in 2 APAC travellers** said that **travel makes them happy**

- **51%**  
  *I am happy when I travel*

- **43%**  
  *I like to travel to escape from the stresses of life*

- **36%**  
  *I would like to travel more often*

- **36%**  
  *I like to plan my travels well in advance*

- **34%**  
  *I like to experience local culture when I travel*

- **27%**  
  *I like to explore more of my own country*
Market Insights

What are the top statements you strongly agree with, when thinking about leisure travel?

I am happy when I travel

I like to travel to escape from the stresses of life

I would like to travel more often

I like to plan my travels well in advance

I like to experience local culture when I travel

I like to explore more of my own country

I think that travel makes me a better person

Market Insights

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<thead>
<tr>
<th>Statement</th>
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<td>I would like to travel more often</td>
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<td>I like to experience local culture when I travel</td>
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<tr>
<td>I like to explore more of my own country</td>
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<td>I think that travel makes me a better person</td>
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</table>
I like to do nothing when I’m travelling

I like travelling to less well-known destinations

I like to be challenged by my travel experiences

I find that planning my travel is just as fun as actually travelling

I like to spend my money on travel rather than other items

I like to connect with people on my travels

I am the go-to person among my friends and family when it comes to travel advice

Market Insights

What are the top statements you strongly agree with, when thinking about leisure travel?
For 3 in 5 APAC travellers, their top motivation to travel is the pursuit of relaxation, rejuvenation and an escape from the chaos of everyday life.

- 56% Travel to relax
- 32% Travel to eat
- 25% Travel to fulfill bucket list
Market Insights

What are the factors, reasons or motivators that encourage you to travel?

Travel to relax
- 56% on average
- Variations across regions

Travel to eat
- 32% on average
- Variations across regions

Travel to fulfill bucket list
- 25% on average
- Variations across regions

Travel to learn
- 23% on average
- Variations across regions

Travel for healthier living
- 22% on average
- Variations across regions

Travel to immerse in local culture
- 21% on average
- Variations across regions

Travel to escape reality
- 21% on average
- Variations across regions

Travel to seek new experiences with people
- 16% on average
- Variations across regions
When it comes to travel experiences, APAC travellers like to seek out **food, nature, tourist attractions** and **beaches**.
Market Insights

What types of places and activities are of interest when you travel?

Food and dining

- HK: 79%
- IN: 66%
- CN: 63%
- SG: 62%
- TW: 67%
- AU: 73%
- NZ: 59%
- KR: 54%
- JP: 63%
- VN: 54%
- TH: 63%

Nature and scenery

- HK: 74%
- IN: 67%
- CN: 58%
- SG: 57%
- TW: 57%
- AU: 70%
- NZ: 66%
- KR: 56%
- JP: 30%
- VN: 49%
- TH: 34%

Tourist attractions and landmarks

- HK: 46%
- IN: 46%
- CN: 46%
- SG: 46%
- TW: 46%
- AU: 40%
- NZ: 40%
- KR: 49%
- JP: 52%
- VN: 56%
- TH: 64%

Islands and beaches

- HK: 58%
- IN: 61%
- CN: 63%
- SG: 40%
- TW: 43%
- AU: 40%
- NZ: 53%
- KR: 42%
- JP: 40%
- VN: 51%
- TH: 51%

Local culture and lifestyle

- HK: 41%
- IN: 37%
- CN: 40%
- SG: 43%
- TW: 38%
- AU: 42%
- NZ: 41%
- KR: 41%
- JP: 35%
- VN: 38%
- TH: 35%

History and tradition

- HK: 31%
- IN: 41%
- CN: 38%
- SG: 40%
- TW: 43%
- AU: 40%
- NZ: 44%
- KR: 35%
- JP: 35%
- VN: 38%
- TH: 31%
Market Insights

What types of places and activities are of interest when you travel?

### Shopping
- HK: 42%
- IN: 52%
- CN: 60%
- SG: 36%
- TW: 38%
- AU: 48%
- NZ: 39%
- KR: 31%
- JP: 41%
- VN: 41%
- TH: 41%

### Sports and physical activities
- HK: 29%
- IN: 31%
- CN: 22%
- SG: 26%
- TW: 38%
- AU: 41%
- NZ: 28%
- KR: 23%
- JP: 15%
- VN: 15%
- TH: 15%

### Arts and museums
- HK: 30%
- IN: 38%
- CN: 30%
- SG: 29%
- TW: 28%
- AU: 35%
- NZ: 29%
- KR: 24%
- JP: 23%
- VN: 30%
- TH: 30%

### Wellness and health treatments
- HK: 37%
- IN: 31%
- CN: 22%
- SG: 17%
- TW: 18%
- AU: 19%
- NZ: 14%
- KR: 27%
- JP: 43%
- VN: 43%
- TH: 43%

### City
- HK: 31%
- IN: 42%
- CN: 51%
- SG: 26%
- TW: 38%
- AU: 41%
- NZ: 28%
- KR: 23%
- JP: 15%
- VN: 15%
- TH: 15%

### Bars and nightlife
- HK: 17%
- IN: 25%
- CN: 14%
- SG: 13%
- TW: 19%
- AU: 14%
- NZ: 21%
- KR: 14%
- JP: 5%
- VN: 5%
- TH: 5%
APAC travellers strategically **plan to reduce costs in various parts of their travels**, including accommodation, travel period, and destination selection.

- **42%** Stay at budget-friendly accommodation
- **37%** Travel during off-peak times
- **33%** Select a less expensive travel destination
- **33%** Select a less expensive means of travelling
- **31%** Plan a trip around a travel discount / deal
- **30%** Spend less while travelling
Market Insights

What would you do to save money when planning your next trip?

- **Stay at more budget-friendly accommodation**: 36% in HK, 40% in IN, 45% in CN, 57% in SG, 49% in TW, 42% in AU, 38% in NZ, 42% in KR, 41% in JP, 45% in VN, and 42% in TH.
- **Travel during an off-peak time of the year**: 38% in HK, 35% in IN, 52% in CN, 50% in SG, 36% in TW, 38% in AU, 36% in NZ, 44% in KR, 27% in JP, 27% in VN, and 37% in TH.
- **Select a less expensive travel destination**: 31% in HK, 32% in IN, 44% in CN, 32% in SG, 31% in TW, 34% in AU, 27% in NZ, 36% in KR, 37% in JP, 33% in VN, and 33% in TH.
- **Select a less expensive means of travelling**: 34% in HK, 32% in IN, 28% in CN, 48% in SG, 42% in TW, 30% in AU, 28% in NZ, 31% in KR, 28% in JP, 34% in VN, and 34% in TH.
- **Plan a trip around a travel discount or deal**: 30% in HK, 26% in IN, 39% in CN, 37% in SG, 24% in TW, 32% in AU, 26% in NZ, 28% in KR, 28% in JP, 28% in VN, and 28% in TH.
- **Spend less while travelling**: 26% in HK, 31% in IN, 38% in CN, 29% in SG, 34% in TW, 40% in AU, 28% in NZ, 20% in KR, 27% in JP, 27% in VN, and 36% in TH.
Market Insights

What would you do to save money when planning your next trip?

- Use public transportation

- Travel to a location where I can stay with a friend or family

- Use loyalty programmes

- Opt for cheaper yet less convenient accommodation

- Extend my business trip for leisure
Apart from **cost**, APAC travellers prioritise factors like **booking multiple aspects of their trip, flexible cancellation and refund policies** when choosing digital travel platforms.

<table>
<thead>
<tr>
<th>Percentage</th>
<th>Feature</th>
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<tbody>
<tr>
<td>52%</td>
<td>Cost</td>
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<tr>
<td>39%</td>
<td>Variety of accommodation types</td>
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<tr>
<td>37%</td>
<td>Flexible cancellation and refund policy</td>
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<tr>
<td>32%</td>
<td>Ability to book multiple aspects of travel</td>
</tr>
</tbody>
</table>
Market Insights

What are the key factors you consider when choosing a digital travel platform for booking travel?

### Cost
- HK: 30%, IN: 35%, CN: 28%
- SG: 51%, TW: 67%, AU: 71%

### Variety of accommodation types
- HK: 41%, IN: 40%, CN: 44%
- SG: 31%, TW: 39%, AU: 34%

### Flexible cancellation and refund policy
- HK: 40%, IN: 40%, CN: 56%
- SG: 38%, TW: 44%, AU: 53%

### Ability to book multiple aspects of travel
- HK: 39%, IN: 38%, CN: 37%
- SG: 35%, TW: 35%, AU: 39%

### Good user experience on platform website or application
- HK: 30%, IN: 35%, CN: 32%
- SG: 32%, TW: 28%, AU: 30%
Market Insights

What are the key factors you consider when choosing a digital travel platform for booking travel?

Variety of payment options

Familiarity with the brand and platform

Loyalty programmes

Display of partners' sustainability practices on platform

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<tbody>
<tr>
<td>Variety of payment options</td>
<td>27%</td>
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<td>24%</td>
<td>19%</td>
<td>27%</td>
<td>17%</td>
<td>13%</td>
<td>25%</td>
<td>23%</td>
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<td>22%</td>
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<tr>
<td>Familiarity with the brand and platform</td>
<td>26%</td>
<td>26%</td>
<td>29%</td>
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<td>35%</td>
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<tr>
<td>Loyalty programmes</td>
<td>17%</td>
<td>24%</td>
<td>16%</td>
<td>19%</td>
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<td>34%</td>
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<tr>
<td>Display of partners' sustainability practices on platform</td>
<td>15%</td>
<td>15%</td>
<td>14%</td>
<td>12%</td>
<td>11%</td>
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</table>
When booking accommodation online, travellers commonly **compare prices, read reviews and review property photos** in their decision-making process.

- **43%** I like to compare prices on other platforms before deciding.
- **41%** I like to read online reviews prior to booking.
- **39%** Property photos make it easier to choose where to stay.
- **33%** Information about what to do near the accommodation eases my decision making.
- **26%** I like receiving updates on deals and promotions.
Market Insights

What are the top statements you strongly agree with, when thinking about digital travel platforms?

- I like to compare prices on other platforms: 43%

- I like to read online reviews prior to booking: 41%

- Property photos make it easier to choose where to stay: 39%

- Information about what to do near the accommodation eases my decision making: 33%

- I like receiving updates on deals and promotions: 26%

- Hotel comparison sites make it easy to find the best deals: 24%

- I trust online travel booking platforms: 22%
Market Insights

What are the top statements you strongly agree with, when thinking about digital travel platforms?

- Loyalty rewards programs for travel bookings are important to me
- I prefer to pay at the hotel
- I tend to book flights and accommodation with the same platform
- No single digital travel platform has the lowest prices all the time
- I do not like to give my personal details online
- Digital travel platforms are all the same
2 in 5 APAC travellers ranked financial concerns as their top worry when choosing to embark on travel.

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<thead>
<tr>
<th>Percentage</th>
<th>Concern</th>
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<tbody>
<tr>
<td>42%</td>
<td>Financial concerns</td>
</tr>
<tr>
<td>30%</td>
<td>Fear of contracting COVID-19 or other diseases</td>
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<tr>
<td>29%</td>
<td>Taking time away from work</td>
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<tr>
<td>27%</td>
<td>Concerned about travel disruptions</td>
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<tr>
<td>27%</td>
<td>Uncertainty about future economic outlook</td>
</tr>
</tbody>
</table>
Market Insights

What are your top concerns about travelling now?

Financial concerns
- 42%: Concerned about travel disruptions
- 30%: Fear of contracting COVID-19 or other diseases during travel
- 29%: Taking time away from work
- 27%: Processes and administrative hassles involved in planning travel

Concerned about travel disruptions

Fear of contracting COVID-19 or other diseases during travel

Taking time away from work

Uncertainty about future economic outlook

Processes and administrative hassles involved in planning travel
Market Insights

What are your top concerns about travelling now?

Complex, costly and long visa procedures

- 22% HK
- 32% IN
- 24% CN
- 26% SG
- 21% TW
- 13% AU
- 13% NZ
- 20% KR
- 25% JP
- 18% VN
- 18% TH

Environmental worries

- 17% HK
- 21% IN
- 14% CN
- 14% SG
- 8% TW
- 10% AU
- 15% NZ
- 10% KR
- 21% JP
- 31% VN
- 16% TH

Having to undergo quarantine either at my destination or in my home country

- 20% HK
- 22% IN
- 17% CN
- 15% SG
- 11% TW
- 15% AU
- 11% NZ
- 10% KR
- 16% JP
- 30% VN
- 16% TH

Payment methods

- 21% HK
- 25% IN
- 14% CN
- 15% SG
- 11% TW
- 11% AU
- 10% NZ
- 13% KR
- 24% JP
- 19% VN
- 15% TH

No concerns

- 27% HK
- 17% IN
- 13% CN
- 12% SG
- 5% TW
- 5% AU
- 5% NZ
- 2% KR
- 2% JP
- 2% VN
- 6% TH
Travel Companions
Understanding their influence on the travel experience
Overview

- All segments are motivated to travel in order to relax as they seek out activities such as food and dining, nature, islands and beaches, tourist attractions and landmarks.

- For them, travel brings happiness and enables one to escape from stresses of life.

- In terms of travel concerns, all segments consider financial concerns and possible travel disruptions as their main reservations.

- Considerations for booking include cost, variety of accommodations and flexible cancellation policies.

- At the same time, all segments are likely to compare prices when it comes to deciding on a digital travel platform.
Solo Travellers

What’s unique about this segment?

- This segment is largely composed of single (54%) and male (57%) travellers, who are Gen Z (30%) and Gen Y (39%)

- It has the biggest number of those who have travelled domestically in the last 12 months (81%), as well as having the most number of trips (up to 6)

- This segment also has the biggest number of those who have already booked a domestic trip for this year (81%) and the most likely to be motivated to experience outdoor activities (58%)

- When it comes to travel concerns, solo travellers are more likely to be concerned with taking time away from work (32%), issues with payment methods (22%) and economic outlook (30%)

- This segment also most likely to take advantage of public transportation (34%) to cut down on travel costs
Couple Travellers

What’s unique about this segment?

- This segment is composed mainly of married (71%) and individuals in relationships (19%), who are Millennials (45%) and Gen X (33%)

- This segment has the largest proportion of international travellers (64%) escaping on a romantic getaway (31%) and for special events (30%)

- This segment also has the biggest number of travellers who have already booked an international trip for this year (30%)

- In terms of cost-cutting efforts, couple travellers are the ones most likely to travel off-peak (41%) to save on costs

- They are also most likely to trust booking websites (26%) and like getting notifications about deals and promotions (30%)
Group Travellers

What’s unique about this segment?

- This segment is mainly composed of both **married** (49%) and **single** (36%) individuals, coming from all age ranges.
- In terms of travel concerns, group travellers are the most likely to be concerned about **tedious admin processes** (27%) and **quarantine policies** (20%).
- To save on costs, they are the **most likely to stay in a less expensive accommodation** (45%) and **visit inexpensive travel destinations** (35%).
- Group travellers are most likely to find **property photos** (41%) and **digital travel platforms** (27%) helpful when choosing where to stay.
#1

Hong Kong SAR

A deep-dive into local travellers
About **1 in 2 travellers** prefer the **off-peak season**, with the majority likely to travel to **North Asia** or **South East Asia**

*Peak season refers to long weekends, summer and/or Christmas holidays*
1 in 2 travellers would book their trips via a digital travel platform. Price, hygiene, and health safety measures are their top priorities.
About **2 in 5** travellers would like to book a **domestic staycation**, with those desiring international travel more likely to do so (62%), surpassing those who prioritise domestic travel (49%).
Travellers expressed that **travelling makes them happy**, and they enjoy immersing themselves in **local culture**.

**Top travel needs and behaviours**

- **49%** Travel makes me happy
- **39%** I travel to experience local culture
- **35%** I like to travel to escape from the stresses of life
- **51%**
- **34%**
- **43%**

**Top travel motivators**

Travellers look forward to a **relaxing holiday** and **cultural immersion experiences** but place a higher emphasis on **food and local cuisine**.

- **63%** Travel to relax
- **45%** Travel to eat
- **26%** Travel to immerse in local culture
- **56%**
- **32%**
- **21%**
Travellers seek a well-rounded travel experience that encompasses **culinary** and **cultural exploration**.

Travellers often strategically plan parts of their trip to **reduce costs**, such as **accommodation**, **destination choice** and **mode of travel**.

**Top places and activities of interest during travel**

- **Food and dining**: 59% (HK), 63% (APAC)
- **Nature and scenery**: 56% (HK), 62% (APAC)
- **Tourist attractions and landmarks**: 44% (HK), 49% (APAC)
- **Local culture and lifestyle**: 42% (HK), 43% (APAC)

**Top money saving strategies for travel**

- **Staying at budget-friendly accommodation**: 36% (HK), 42% (APAC)
- **Selecting a less expensive travel destination**: 31% (HK), 33% (APAC)
- **Selecting a less expensive means of travelling**: 34% (HK), 33% (APAC)
Travellers prioritise having variety in **accommodation types**, as well as **flexible cancellations** and **refund policies over costs** when selecting which digital travel platform to use.

### Considerations for digital travel platforms

<table>
<thead>
<tr>
<th>Feature</th>
<th>HK</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Variety of accommodation types</td>
<td>41%</td>
<td>39%</td>
</tr>
<tr>
<td>Flexible cancellation and refund policies</td>
<td>40%</td>
<td>37%</td>
</tr>
<tr>
<td>Ability to book multiple aspects of a trip</td>
<td>39%</td>
<td>32%</td>
</tr>
</tbody>
</table>
Travellers are primarily concerned about being **away from work**, followed by **financial concerns**, and **potential travel disruptions**.

---

**Top opinions about digital travel platforms**

- Travellers may be attracted by a diverse range of offerings online, but they still tend to **compare prices** across multiple digital travel platforms before making a decision on the best deal when booking accommodation online.

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**Top travel concerns**

- **Taking time away from work**: 37% (29%)
- **Financial concerns**: 33% (42%)
- **Concerns about travel disruptions**: 33% (27%)
#2 India
A deep-dive into local travellers
Travellers like to prepare detailed itineraries in advance; over half consider it crucial to have access to Indian food.

### Behaviour when it comes to planning itineraries

- **57%** I prefer a planned itinerary and to book travel, accommodation, activities, and dining in advance.
- **30%** I prefer to book only transport and accommodation in advance; everything else can be on the go.
- **12%** It doesn’t matter to me as long as I can travel.

### Importance of food when deciding travel plans

- **Extremely important; I want to explore local cuisine**: 36%
- **Extremely important; there must be Indian food**: 30%
- **Somewhat important; as long as I have Indian food options**: 21%
- **Somewhat important; as long as I have vegetarian food options**: 9%
- **Not important at all**: 4%

60% Must have Indian food options.
3 in 5 would prefer to **travel during the long weekend holidays**, with majority wanting to travel to **North or South India**

**Top 3 domestic destinations for travel**

- **North India**: 71%
- **South India**: 60%
- **West India**: 41%
- **Northeast India**: 37%
- **East India**: 16%
- **Central India**: 13%

**Likelihood to choose sustainable accommodations**

- **Likely**: 85%
- **Neutral**: 14%
- **Unlikely**: 1%

**4 in 5 are likely to choose accommodations that practice sustainability measures with **India ranking 1st** in terms of **sustainability interest**.**
Travellers have a **stronger inclination to explore their own country**, believe in the **power of travel for personal growth**, and a **desire to foster meaningful connections** on their travels.

**Travel needs and behaviours**

- **43%** I like to explore more of my own country
- **40%** Travel makes us better people
- **33%** I want to connect with people on my travels
- **27%**
- **25%**
- **19%**

**Travel motivators**

Other than the desire for a relaxing holiday, travellers show a **high interest in learning about their travel destinations**

- **57%** Travel to relax
- **34%** Travel to learn
- **16%** Travel to eat
Travellers are more curious and interested in a wide range of places and activities, but they show less interest in food and dining.

Travellers are inclined to plan their trips around travel discounts and deals, and they often take advantage of staying with friends or family to save on travel costs.

Top places and activities of interest during travel:
- Nature and scenery: 67% (IN: 62%)
- Islands and beaches: 63% (APAC: 45%)
- Food and dining: 57% (IN: 63%)

Top money saving strategies for travel:
- Planning a trip around a travel discount or deal: 39% (IN: 31%)
- Travel to where I can stay with a friend or family: 36% (APAC: 24%)

Travellers exhibit a preference for digital travel platforms that offer a diverse range of offerings and flexible cancellation and refund policies.

Considerations for digital travel platforms:
- Variety of accommodation types: 40% (IN: 39%)
- Flexible cancellation and refund policy: 40% (APAC: 37%)
- Cost: 35% (APAC: 52%)
Travellers **trust digital travel platforms** but perceive them as broadly similar, and are more likely to prioritise **loyalty rewards**.

<table>
<thead>
<tr>
<th>Top opinions about digital travel platforms</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>I trust digital travel platforms</td>
<td>42%</td>
</tr>
<tr>
<td>Loyalty rewards for accommodation booking are important</td>
<td>35%</td>
</tr>
<tr>
<td>Digital travel platforms are all the same</td>
<td>27%</td>
</tr>
</tbody>
</table>

**Top travel concerns**

Travellers are most concerned about **being away from work, facing complex and costly visa procedures, and the environment**.

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Taking time away from work</td>
<td>39%</td>
</tr>
<tr>
<td>Complex, costly and long visa procedures</td>
<td>32%</td>
</tr>
<tr>
<td>Environmental concerns</td>
<td>32%</td>
</tr>
</tbody>
</table>

IN | APAC

- IN: 54  
- APAC: 54
#3

China Mainland

A deep-dive into local travellers
Two-thirds proceeded with their original domestic travel plans when travel restrictions were lifted in China Mainland, while a third changed their plans immediately to an overseas trip.
9 in 10 travellers would prefer to **travel domestically** this year; including those who changed their plans to travel internationally when travel restrictions were lifted.

**Preference when it comes to leisure travel**

<table>
<thead>
<tr>
<th>International</th>
<th>Domestic</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
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<td></td>
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<td></td>
<td></td>
</tr>
</tbody>
</table>

**More than half (58%) are likely to book their travels during off-peak seasons**

**Booking behaviour when it comes to off-peak seasons**

- 58% Book during off-peak seasons
- 11% I only book travel during off-peak seasons
- 15% I always book travel during off-peak seasons
- 32% I often book travel during off-peak seasons
- 39% I sometimes book travel during off-peak seasons
- 4% I never book to travel during off-peak seasons
Friendliness to Chinese tourists is a top consideration when it comes to choosing international destinations, followed by cost-efficiency.

### Considerations when choosing international destinations

<table>
<thead>
<tr>
<th>Trip preference breakdown</th>
<th>International travel (14%)</th>
<th>Domestic travel (86%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>A destination that is friendly to Chinese tourists</td>
<td>56%</td>
<td>54%</td>
</tr>
<tr>
<td>Cost-efficiency</td>
<td>48%</td>
<td>46%</td>
</tr>
<tr>
<td>Belongs to the first 20 destinations that China opens outbound group tours to</td>
<td>39%</td>
<td>34%</td>
</tr>
<tr>
<td>A short-haul destination</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>Belongs to my bucket list of destinations over the past 3 years even during travel restrictions</td>
<td>24%</td>
<td>26%</td>
</tr>
<tr>
<td>A travel destination postponed due to COVID-19</td>
<td>23%</td>
<td>28%</td>
</tr>
<tr>
<td>A long-haul destination</td>
<td>17%</td>
<td>22%</td>
</tr>
</tbody>
</table>

International travel: 54%  
Domestic travel: 56%
There are concerns about the recovery of **COVID-19 situation overseas** and travel being **too expensive**, while those who prefer domestic travel find themselves **too busy to travel**.

### Concerns when it comes to overseas travel

<table>
<thead>
<tr>
<th>Trip preference breakdown</th>
<th>International travel (14%)</th>
<th>Domestic travel (86%)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worried about the COVID-19 situation overseas</td>
<td>37%</td>
<td>38%</td>
</tr>
<tr>
<td>Worried that travel destination is not recovered and ready for international travellers</td>
<td>36%</td>
<td>36%</td>
</tr>
<tr>
<td>It's too expensive to travel overseas now and I want to wait until the price drops down</td>
<td>31%</td>
<td>31%</td>
</tr>
<tr>
<td>I want to finish my domestic travel plan this year</td>
<td>30%</td>
<td>32%</td>
</tr>
<tr>
<td>It's on my plan; I'm too busy to travel overseas now</td>
<td>25%</td>
<td>24%</td>
</tr>
<tr>
<td>I have no concerns</td>
<td>10%</td>
<td>9%</td>
</tr>
</tbody>
</table>
Travellers express that travel brings them **happiness**, enjoy immersing themselves in **local cultures**, and have a greater inclination to **stay in franchise hotels**.

**Travel needs and behaviours**

- 40%: I travel to experience local culture
- 34%: I travel to relax
- 18%: I prefer to stay in chained-brand or franchise hotels
- 12%: I travel to eat

**Travel motivators**

Travellers look forward to a relaxing holiday and place higher emphasis on **food and local cuisine** and **fulfilling their travel bucket list**.

- 56%: Travel to relax
- 38%: Travel to eat
- 37%: Travel to fulfill bucket list
- 25%: Travel to experience local culture
Travellers' top three interests revolve around exploring **nature and scenery**, indulging in **food and dining experiences**, and enjoying **islands and beaches**.

To cut costs, travellers adopt various measures such as selecting **budget-friendly accommodations**, planning trips during **off-peak periods**, and utilising **public transportation**.

### Top places and activities of interest during travel

- **Nature and scenery**: 58% (CN 62%)
- **Food and dining**: 54% (CN 63%)
- **Islands and beaches**: 51% (CN 45%)

### Top money saving strategies for travel

- **Stay at budget-friendly accommodation**: 40% (CN 42%)
- **Travel during off-peak times**: 35% (CN 37%)
- **Take advantage of public transportation**: 33% (CN 28%)
Travellers prioritise a diverse range of offerings beyond just accommodations, which include flexible cancellation and refund policies.

Top travel concerns for CN travellers include health risks like COVID-19 and being away from work. Compared to the rest of APAC, CN travellers are the least worried about financial concerns.

Travellers tend to read reviews and compare prices across multiple digital travel platforms before making a decision when booking accommodation.
A deep-dive into local travellers

#4

Singapore

A deep-dive into local travellers
Almost half (47%) start planning their trips about **1 to 4 months prior to travel**, while a quarter (28%) start even earlier - about 4 months or more in advance!

**Time of trip planning for upcoming travel**

- **I never plan, I decide on the go**: 5%
- **On the day I am bound for travel**: 1%
- **1-2 days before the trip**: 2%
- **3-7 days before**: 3%
- **1-2 weeks before**: 6%
- **2-4 weeks before**: 8%
- **1 to 2 months before**: 23%
- **2 to 4 months before**: 24%
- **4 to 6 months before**: 17%
- **6 to 12 months before**: 10%
- **More than a year before**: 1%
The *rising cost of living* is the most significant factor affecting travel plans, alongside concerns about *political unrest, COVID-19*, and the *threat of natural disasters*.
Travellers have diverse preferences for travel destinations, with the majority willing to spend up to **SGD250 per night for accommodation**.

### Preferred travel destinations

- **East Asia (Japan, South Korea)**: 18%
- **Oceania (Australia, New Zealand)**: 15%
- **Europe**: 15%
- **South East Asia**: 14%
- **Middle East**: 7%
- **South Asia**: 11%
- **North America (USA, Canada)**: 12%
- **Latin America**: 7%

### Preferred accommodation budget (SGD) per night

- **< $100**: 32%
- **$100 - $250**: 56%
- **$250 - $500**: 10%
- **$500 - $1000**: 2%
Only **3 in 10** travellers would be likely to book a **domestic staycation** as many more look forward to travelling overseas.

Travellers are often **stressed** and use travel as an escape from their routine and **find happiness**.

**Likelihood to book domestic staycations**

- **Likely** 27%
- **Neutral** 30%
- **Unlikely** 43%

**Travel needs and behaviours**

- **62%** travel makes me happy
- **51%** I would like to travel more often
- **60%** I like to travel to escape from the stresses of life
- **43%** I like to plan my travels well in advance
- **46%** I like to plan my travels well in advance
Travellers prioritise **relaxation** and **local cuisine**, and are more likely to **fulfill their bucket lists to escape reality**.

### Travel motivators

<table>
<thead>
<tr>
<th>Description</th>
<th>SG</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel to relax</td>
<td>54%</td>
<td>56%</td>
</tr>
<tr>
<td>Travel to eat</td>
<td>32%</td>
<td>36%</td>
</tr>
<tr>
<td>Travel to fulfill bucket list</td>
<td>31%</td>
<td>25%</td>
</tr>
<tr>
<td>Travel to escape reality</td>
<td>29%</td>
<td>21%</td>
</tr>
</tbody>
</table>

### Top places and activities of interest during travel

<table>
<thead>
<tr>
<th>Description</th>
<th>SG</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food and dining</td>
<td>79%</td>
<td>63%</td>
</tr>
<tr>
<td>Famous tourist attractions or landmarks</td>
<td>64%</td>
<td>49%</td>
</tr>
<tr>
<td>Nature and scenery</td>
<td>70%</td>
<td>62%</td>
</tr>
<tr>
<td>Shopping</td>
<td>60%</td>
<td>41%</td>
</tr>
</tbody>
</table>
Travellers save costs by **choosing budget-friendly accommodation**, travelling during **off-peak times**, and **selecting affordable destinations**.

Travellers are **extremely price-conscious**, prioritising the **cost and flexibility of cancellation** and **refund policies** as the most significant factors when selecting digital travel platforms.

### Top money saving strategies for travel

- **Stay at budget-friendly accommodation**: 57%
- **Travel during off-peak times**: 52%
- **Selecting a less expensive travel destination**: 44%

### Considerations for digital travel platforms

- **Cost**: 69%
- **Flexible cancellation and refund policy**: 56%
- **Good user experience on platform**: 32%
Travellers will **read reviews and compare prices** across multiple digital travel platforms before making a decision when booking accommodation online.

**Opinions about digital travel platforms**

- **60%** | **43%**
  - I like to compare prices on other platforms before deciding

- **57%** | **41%**
  - I like to read online reviews prior to booking

- **46%** | **33%**
  - Information about what to do near the accommodation eases my decision

**Top travel concerns**

Travellers are the most concerned about **finances**, followed by **travel disruptions** and fear of **potential exposure to illnesses such as COVID-19**.
Taiwan

A deep-dive into local travellers
Majority (64%) are willing to travel more given the longer holidays this year with a higher preference for domestic travel.
About 7 in 10 would like to travel domestically for short holidays and turn to online media for travel inspiration.

**Reasons for travelling domestically**

- 68% Rather have a short holiday
- 46% Scenic attractions
- 40% Accommodation prices
- 31% Local experiences
- 18% Unique accommodations

**Channel preference for travel inspirations or recommendations**

- 73% Online media
- 43% Family and friends
- 39% Broadcast media
- 19% Influencers
- 28% Print media
- 6% None of the above
Travellers may be enticed to use digital travel platforms that have **deals** for flight tickets or experiences.

Preference for product promotions offered that will entice them to use digital travel platforms:

- **Flight tickets**: 36%
- **Experiences**: 26%
- **Attractions**: 23%
- **Car rentals**: 15%
Travellers find **happiness** in travel, embrace **cultural immersion**, and prefer to **thoroughly pre-plan their trips**

**Travel needs and behaviours**

- **Travel makes me happy**: 59%
- **I travel to experience local culture**: 39%
- **I like to plan my travels well in advance**: 36%

**Top places and activities of interest during travel**

- **Food and dining**: 66% (TW 63%, APAC 62%)
- **Famous tourist attractions and landmarks**: 52% (TW 49%, APAC 43%)
- **Nature and scenery**: 65% (TW 62%, APAC 49%)
- **Local culture and lifestyle**: 52% (TW 49%, APAC 43%)

Travellers have a **higher appreciation for local culture**, with their top three interests being **food and dining**, **nature**, and **tourist attractions**.
Travellers look at cost, variety of options beyond just accommodations, and the ability to book with flexible cancellation and refund policies.
Travellers will **read reviews and gather information** about the accommodation that they are interested in, and use **hotel comparison sites** to find the best deals.

### Opinions about digital travel platforms

- **38%** I like to read online reviews prior to booking
- **38%** Information about what to do near the accommodation eases my decision
- **37%** Hotel comparison sites make it easy to find the best deals

### Top travel concerns

- **42% / 39%** Financial concerns
- **30% / 34%** Fear of contracting COVID-19 or other diseases
- **27% / 30%** Uncertainty about future economic outlook

Travellers are most concerned about their **financial situation** and the **uncertain economic outlook**.
#6

Australia

A deep-dive into local travellers
Cost of living pressures have impacted travels plans for travellers, with the majority (71%) looking for cheaper holidays, or not travelling at all.
Only **28%** said the pandemic has **affected their preference on accommodation type** when travelling.

### Preferred type of accommodations

<table>
<thead>
<tr>
<th>Accommodation Type</th>
<th>Yes 28%</th>
<th>No 72%</th>
</tr>
</thead>
<tbody>
<tr>
<td>Luxury 4-5+ star hotel</td>
<td>23%</td>
<td>24%</td>
</tr>
<tr>
<td>1-3 star hotel</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Apartment / Aparthotel / Condo</td>
<td>14%</td>
<td>14%</td>
</tr>
<tr>
<td>Boutique hotel</td>
<td>3%</td>
<td>5%</td>
</tr>
<tr>
<td>Guesthouse</td>
<td>3%</td>
<td>1%</td>
</tr>
<tr>
<td>Hostel</td>
<td>2%</td>
<td>3%</td>
</tr>
</tbody>
</table>

Whether the pandemic has affected preferred accommodation type.
Travellers that book multiple travel services mostly prefer to book accommodation, flights and car rentals altogether online.

Preferred combination of travel services to book via digital travel platforms:

- 55%: Accommodation, flights, car rental
- 54%: Taxis, attractions & experiences, accommodation
- 51%: Flights, car rental, taxis
- 48%: Accommodation, flights, car rental, taxis, attractions & experiences
Top considerations for accommodation choice include **proximity to local spots**, **cleanliness**, and **hotel amenities and facilities**.

AU travellers have apprehensions regarding their financial situation and the uncertain economic outlook; some still harbour concerns about potential travel disruptions.

<table>
<thead>
<tr>
<th>Considerations for accommodation choices</th>
<th>[%]</th>
<th>Top travel concerns</th>
<th>[%]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Proximity to local destinations</td>
<td>52%</td>
<td>Financial concerns</td>
<td>51%</td>
</tr>
<tr>
<td>Tidiness and cleanliness</td>
<td>52%</td>
<td>Uncertainty about future economic outlook</td>
<td>27%</td>
</tr>
<tr>
<td>Hotel amenities and facilities</td>
<td>49%</td>
<td>Concerns about travel disruptions</td>
<td>26%</td>
</tr>
</tbody>
</table>

AU APAC
Travellers expressed interest to travel more often, with a strong interest to explore and discover their own backyard with what Australia has to offer.

Travel motivators

Travellers demonstrate a markedly higher inclination to seek out relaxing holidays to escape from reality, and to fulfill their travel bucket list.

- 66% Travel to relax
- 33% Travel to escape reality
- 29% Travel to fulfill bucket list

Travel needs and behaviours

- 50% I would like to travel more often
- 41% I like to plan my travels well in advance
- 37% I like to explore more of my own country
Travellers have a **distinct affinity** for **islands and beaches**, **vibrant cityscapes** and **bars and nightlife**.

### Top places and activities of interest during travel

- **53%** Islands and beaches
- **38%** City
- **19%** Bars and nightlife

### Top money saving strategies for travel

- **Stay at budget-friendly accommodation**: 38% (AU 42%)
- **Travel during off-peak times**: 36% (AU 37%)
- **Spend less while travelling**: 34% (AU 33%)
- **Travel to where I can stay with a friend or family**: 27% (AU 24%)
Travellers are **highly cost sensitive**, with **cost and flexibility of cancellation and refund policies** being the most important factors when choosing digital travel platforms.

Travellers will **read reviews, check out property photos**, and **compare prices** across multiple digital travel platforms before deciding on the best deal when booking accommodation online.

- **I like to compare prices on other platforms before deciding**: 44% (AU), 43% (APAC)
- **Property photos make it easier to choose where to stay**: 42% (AU), 39% (APAC)
- **I like to read online reviews prior to booking**: 41% (AU), 41% (APAC)
#7

New Zealand

A deep-dive into local travellers
Almost half cite readiness to travel with 14% already gone abroad; those wary but keen to travel (39%) said they would consider only destinations with low COVID-19 cases.
Only **15%** of travellers have embarked on an extended travel experience while working remotely; with a good majority (40%) keeping this on their bucket list.

On working remotely while concurrently travelling for a long period of more than 1 month:

- Yes, I have done so once: **5%**
- Yes, I have done so more than once: **10%**
- No, but I would love to embark on one: **40%**
- No and I am not interested: **44%**
Rising cost of living and travel expenses are the biggest considerations for NZ travellers when it comes to their travel decisions this year.

**Factors that affect travel decisions**

- Cost of living: 79%
- Increasing mortgage interest rates: 24%
- Concerns about COVID-19: 22%
- Threat of natural disasters: 17%
- Protests and political unrest in other countries: 15%
- Concerns about climate change and travel's impact: 13%

**Biggest financial barriers to leisure travel**

- Increased cost of travel: 41%
- The increasing cost of living: 50%
- The cost of getting travel insurance that covers COVID-19: 3%
- Foreign exchange rates meaning my money won't go as far: 7%
While the rise of natural disasters in recent years does not significantly affect travel confidence (68%), they still impact their choice of travel destination.

<table>
<thead>
<tr>
<th>Response</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes – we’ve dealt with enough at home</td>
<td>11%</td>
</tr>
<tr>
<td>Yes, because I’m worried about travel disruptions and cancellations</td>
<td>20%</td>
</tr>
<tr>
<td>No, but it would impact my decision of where to travel</td>
<td>44%</td>
</tr>
<tr>
<td>No, I have planned holidays and don’t intend to change them</td>
<td>12%</td>
</tr>
<tr>
<td>I am not sure</td>
<td>12%</td>
</tr>
</tbody>
</table>
Travellers expressed more interest to **travel more often**, with a strong interest to **explore and discover the diverse offerings New Zealand has to offer**.

**Travel needs and behaviours**

- **59%** would like to travel more often
- **41%** like to plan my travels well in advance
- **41%** like to explore more of my own country

**Travel motivators**

- **67%** to relax
- **32%** to escape reality
- **27%** to fulfil bucket list
- **25%** to learn

Travellers demonstrate a notably higher inclination to seek out **relaxing holidays to escape from reality**.
Travellers are more inclined to explore **nature, islands and beaches, cities**, and embark on **shopping** during their travels.

### Top places and activities of interest during travel

<table>
<thead>
<tr>
<th>Activity</th>
<th>NZ</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Nature and scenery</td>
<td>68%</td>
<td>62%</td>
</tr>
<tr>
<td>Islands and beaches</td>
<td>63%</td>
<td>45%</td>
</tr>
<tr>
<td>City</td>
<td>41%</td>
<td>31%</td>
</tr>
<tr>
<td>Shopping</td>
<td>48%</td>
<td>41%</td>
</tr>
</tbody>
</table>

### Top money saving strategies for travel

Travellers minimise travel expenses by choosing **budget-friendly accommodations**, travelling during **off-peak times**, practicing **mindful spending**, and being **open to homestays with friends or family**.

<table>
<thead>
<tr>
<th>Strategy</th>
<th>NZ</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stay at budget-friendly accommodation</td>
<td>42%</td>
<td>42%</td>
</tr>
<tr>
<td>Spend less while travelling</td>
<td>40%</td>
<td>30%</td>
</tr>
<tr>
<td>Travel during off-peak times</td>
<td>39%</td>
<td>37%</td>
</tr>
<tr>
<td>Travel to where I can stay with a friend or family</td>
<td>37%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Travellers are **highly cost sensitive**. **Cost and flexibility of cancellation and refund policies** are considered the most important factors when choosing digital travel platforms.

### Considerations for digital travel platforms

- **Cost**: 71%
- **Flexible cancellation and refund policy**: 53%
- **Variety of accommodation types**: 33%

### Top travel concerns

Travellers are most **concerned about their financial situation**, along with **potential travel disruptions** and the **uncertain economic outlook**.

- **Financial concerns**: 55%
- **Concerned about travel disruptions**: 28%
- **Uncertainty about future economic outlook**: 27%
Travellers will **read reviews**, **check out property photos**, and **compare prices** across multiple digital travel platforms before deciding on the best deal when booking accommodation online.

<table>
<thead>
<tr>
<th>Opinion</th>
<th>NZ</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>I like to compare prices on other platforms before deciding</td>
<td>52%</td>
<td>43%</td>
</tr>
<tr>
<td>I like to read online reviews prior to booking</td>
<td>50%</td>
<td>41%</td>
</tr>
<tr>
<td>Property photos make it easier to choose where to stay</td>
<td>49%</td>
<td>39%</td>
</tr>
</tbody>
</table>
#8

Korea

A deep-dive into local travellers
During summer, travellers are **split on choosing between local and international travel**; but prefer domestic as it is **cheaper and easier**.

### Travel destinations preferred during summer

- **Domestic, within Korea**: 48%
- **East Asia**: 15%
- **South East Asia**: 11%
- **Europe**: 7%
- **Oceania**: 6%
- **North America**: 3%

### Reasons for choosing domestic destinations

- **62%**: Easier to manage within a short holiday
- **54%**: Ease of travel
- **51%**: Lower travel prices
- **17%**: Attractive tourist spots even compared to overseas destinations
- **15%**: Concerns about COVID-19
- **15%**: Contribution to the local economy
Those travelling to **international destinations** during summer are driven by their desire for **cultural exchange and escapism** from daily life.

### Travel destinations preferred during summer

- **Domestic, within Korea**: 48%
- **East Asia**: 15%
- **South East Asia**: 11%
- **Europe**: 7%
- **Oceania**: 6%
- **North America**: 3%

### Reasons for preferring **international** destinations

- **Desire to experience other cultures**: 51%
- **Complete escape from daily go-abouts**: 43%
- **Desire to try exotic foods**: 42%
- **Spectacular scenic attractions**: 36%
- **Disconnect from work**: 27%
- **Encounters with new people**: 9%
About **1 in 2** are likely to travel off-peak during the summer holidays to **take advantage of lower prices** and **avoid crowds**.

**Likelihood to travel off-peak for summer holidays this year**

- **Likely**: 54%
- **Neutral**: 29%
- **Unlikely**: 18%

**Reasons for travelling off-peak**

- Lower travel prices: 66%
- Dislike of crowded people: 64%
- Mitigating overtourism: 32%
- Preference of travelling in mild weather: 32%
- Not being able to leave work during the peak season: 13%
Tidiness and cleanliness, prices and online reviews are most valued by travellers when choosing accommodation.

Considerations when selecting accommodation:

- **50%** Tidiness and cleanliness
- **49%** Price
- **39%** Online reviews and recommendations

Travellers are often stressed and use travel as an escape to find happiness; they express a desire to travel more frequently and tend to plan their trips well in advance.

Travel needs and behaviours:

- **48%** Travel makes me happy
- **47%** I like to travel to escape from the stresses of life
- **36%** I would like to travel more often
- **31%** I like to plan my travels well in advance
The top places and activities of interest to travellers are **food and dining, nature and scenery**, as well as **island and beaches**.

**Travel motivators**

Travellers enjoy **relaxing holidays** with **delectable local cuisine**, but their enthusiasm for **transformative experiences** is also there.

- **68%** (56%) Travel to relax
- **29%** (32%) Travel to eat
- **27%** (14%) Travel to be transformed

**Top places and activities of interest during travel**

- **62%** (63%) Food and dining
- **57%** (62%) Nature and scenery
- **40%** (45%) Islands and beaches
Top ways travellers reduce costs are by travelling off-peak, choosing more budget-friendly accommodations or travel destinations.

When choosing digital travel platforms, travellers look at cost, variety of options beyond just accommodations, and the ability to book with flexible cancellation and refund policies.

**Top money saving strategies for travel**

- Travel during off-peak times: 38%
- Stay at budget-friendly accommodation: 35%
- Select a less expensive travel destination: 27%

**Considerations for digital travel platforms**

- Cost: 52%
- Variety of accommodation types: 39%
- Ability to book multiple aspects of a trip: 32%
Travellers will **read reviews and compare prices** across multiple digital travel platforms before deciding on the best deal when booking accommodation online.

Aside from financial concerns and apprehensions about being away from work, travellers are particularly concerned about **having to deal with processes and administrative hassles involved in planning a trip**.

### Opinions about digital travel platforms

- **47%** I like to read online reviews prior to booking
- **42%** I like to compare prices on other sites/apps before deciding
- **31%** I like getting notifications about deals and promos

### Top travel concerns

- **42%** Financial concerns
- **29%** Processes and admin hassles involved in planning a trip
- **27%** Taking time away from work
#9 Japan

A deep-dive into local travellers
There is a strong preference among travellers to travel domestically regardless of seasons or long holiday periods.

**Travel destinations preferred for summer and winter seasons**
- Domestic for winter; overseas for summer: 8%
- Domestic for summer; overseas for winter: 9%
- Domestic for summer and winter: 78%
- Overseas for summer and winter: 5%

**Travel destinations preferred for long holiday periods**
- Domestic (within Japan): 81%
- International (to other regions such as Europe, North America, etc.): 10%
- International (within Asia): 9%
1 in 2 of travellers agreed that travelling overseas is no longer a priority due to the effects of the COVID-19 pandemic.
About **3 in 10** have used the National Travel Discount Programme, but mainly for **accommodations**.

**On usage of the National Travel Discount (NTD) Programme**
- Yes, I have used it already: 32%
- I have yet to do so, but have the intention to: 24%
- No, I do not plan to use it: 44%

**Elements utilised under NTD Programme**
- Accommodation: 73%
- Restaurants: 38%
- Transport: 28%
- Attractions: 13%
Travellers are often stressed and use travel as an escape from their routine and find happiness; they also express a desire to travel more frequently and want to be challenged.

Travellers eagerly anticipate a relaxing holiday with delectable local cuisine; they are keen on invigorating activities for both the body and mind, driven by health, sports, and overall pleasure.

**Travel needs and behaviour**

- **52%** / **43%** I like to travel to escape from the stresses of life
- **41%** / **51%** Travel makes me happy
- **34%** / **36%** I would like to travel more often
- **33%** / **20%** I want to be challenged by my travel experiences

**Travel motivators**

- **53%** / **56%** Travel to relax
- **46%** / **32%** Travel to eat
- **33%** / **22%** Travel for healthier living
The top 3 places and activities of interest to travellers are **food and dining**, **nature and scenery**, and **famous tourist attractions**.

### Top places and activities of interest during travel

- **Food and dining**: 67% / 63%
- **Nature or scenery**: 55% / 62%
- **Famous tourist attractions or landmarks**: 46% / 49%

### Top money saving strategies for travel

- **Stay at budget-friendly accommodation**: 41% / 42%
- **Selecting a less expensive means of travelling**: 31% / 33%
- **Selecting a less expensive travel destination**: 36% / 33%

**Travellers' top cost cutting measures include selecting budget-friendly accommodations, opting for affordable transportation and destinations, and selecting a less expensive travel destination.**
Travellers are **highly cost sensitive**. Cost, accommodation options, and the ability to book multiple aspects of a trip are the most important factors when choosing digital travel platforms.

Considerations for digital travel platforms:

- **Cost**: 66% in JP, 52% in APAC
- **Variety of accommodation types**: 43% in JP, 39% in APAC
- **Ability to book multiple aspects of a trip**: 25% in JP, 32% in APAC

Travellers will **read reviews, check out property photos, and compare prices** across multiple digital travel platforms before deciding on the best deal when booking accommodation online.

Opinions about digital travel platforms:

- **Property photos make it easier to choose where to stay**: 39% in JP, 32% in APAC
- **I like to compare prices on other platforms before deciding**: 43% in JP, 36% in APAC
- **I like to read online reviews prior to booking**: 41% in JP, 33% in APAC

They are the **most fearless travellers with "no concerns" - 3x higher** than the average APAC traveller.

**Top travel concerns**

- **No concerns at all**: 27% in JP, 10% in APAC
- **Financial concerns**: 34% in JP, 42% in APAC
- **Fear of contracting COVID-19 or other diseases while on vacation**: 28% in JP, 30% in APAC
#10

Vietnam

A deep-dive into local travellers
If price was not a concern, travellers would visit international destinations as part of their motivation to explore new places.

### Mindset towards leisure travel

- **Prefer familiar places; new destinations are not too much a priority to me**: 26%
- **Prefer returning to pre-visited destinations to explore more; while also considering new places**: 42%
- **I will explore new places**: 32%

### Desire to explore new places

- **73%**

### Travel destination preference, if price was not a concern

- **International**: 38%
- **Domestic**: 32%
- **Depends on the destinations**: 23%
- **Depends on the travel companion (e.g. solo, friends, or family)**: 7%
Majority of travellers agree that the pandemic has changed the way they travel, preferring more scenic travels or prioritising more family holidays.

Changes in travel habits as a result of the pandemic:

- **53%**: I prefer natural scenery more
- **52%**: I want more trips to spend quality time with my family
- **40%**: I travel more mindfully

Accommodation budget varies greatly, with the majority (44%) only willing to pay up to 1 million VND per night.
With China Mainland’s borders reopened, **1 in 3 travellers** show interest to visit the country this year

On interest in travelling to China Mainland as their borders reopened

<table>
<thead>
<tr>
<th></th>
<th>Yes</th>
<th>Maybe</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>37%</td>
<td>48%</td>
<td>16%</td>
</tr>
</tbody>
</table>

Travellers are more likely to crave for **challenging travel experiences** and would like to explore more of their own backyard

Travel needs and behaviours

- I want to be challenged by my travel experiences: 38%
- I like to explore more of my own country: 35%
- I like travelling to less well-known destinations: 34%
- Travel makes me happy: 31%

VN APAC
Travellers prioritise travel experiences that give them a sense of prestige, surpassing the average APAC traveller in their pursuit of recognition and elevated status.

### Travel motivators

<table>
<thead>
<tr>
<th>Motivation</th>
<th>VN</th>
<th>APAC</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel for healthier living</td>
<td>22%</td>
<td>35%</td>
</tr>
<tr>
<td>Travel to immerse in local culture</td>
<td>21%</td>
<td>30%</td>
</tr>
<tr>
<td>Travel to seek new experiences with people</td>
<td>16%</td>
<td>29%</td>
</tr>
<tr>
<td>Travel for elevated status and prestige</td>
<td>6%</td>
<td>28%</td>
</tr>
</tbody>
</table>

### Top places and activities of interest during travel

Travellers are most likely to opt for **sports or physical activities** during travel.

- **Islands and beaches**: 61% / 45%
- **City**: 60% / 31%
- **Sports or physical activities**: 45% / 17%

![Diagram showing travel motivators and top places/activities]
To minimise costs, travellers will opt for **off-peak travel times**, **leverage loyalty programs**, and are open to **homestays with friends or family**.

VN travellers place particular emphasis on **brand and platform familiarity and loyalty programmes** when choosing digital travel platforms.

**Top money saving strategies for travel**

- **44% / 37%**  
  Travel during off-peak times

- **43% / 20%**  
  Use loyalty programmes to offset cost

- **28% / 33%**  
  Selecting a less expensive means of travelling

**Considerations for digital travel platform**

- **Cost**
  - VN: 39%
  - APAC: 52%

- **Familiarity with the brand and platform**
  - VN: 35%
  - APAC: 22%

- **Loyalty programme**
  - VN: 34%
  - APAC: 17%
Travellers perceive all digital travel platforms to be similar, where they will compare prices across multiple platforms for the best deals.

**Opinions about digital travel platforms**

- **44%** I like to compare prices on other digital travel platforms before deciding.
- **37%** No single digital travel platform has the lowest prices all the time.
- **35%** Digital travel platforms are all the same.

**Top travel concerns**

- Travellers are most concerned about their financial situation, as well as health risks during travel and potential travel disruptions.
- **40% / 42%** Financial concerns.
- **40% / 30%** Fear of contracting COVID-19 or other diseases.
- **35% / 27%** Concerned about travel disruptions.
#11

Thailand

A deep-dive into local travellers
Apart from the rising cost of living, **climate change and natural disasters**, are the top factors that impact travellers' decisions.

<table>
<thead>
<tr>
<th>Factor</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Rising cost of living</td>
<td>65%</td>
</tr>
<tr>
<td>Concerns about climate change and travel's impact</td>
<td>45%</td>
</tr>
<tr>
<td>The threat of natural disasters</td>
<td>45%</td>
</tr>
<tr>
<td>GST hike</td>
<td>40%</td>
</tr>
<tr>
<td>Concerns about COVID-19</td>
<td>37%</td>
</tr>
<tr>
<td>Job security (retrenchments, etc.)</td>
<td>34%</td>
</tr>
<tr>
<td>Protests and political unrest in other countries</td>
<td>21%</td>
</tr>
<tr>
<td>Increasing mortgage interest rates</td>
<td>15%</td>
</tr>
</tbody>
</table>

Factors that will impact upcoming travel decisions
3 in 5 travellers are likely to visit a local sustainable destination

Likelihood to visit a destination in Thailand that adopts sustainable practices

Travellers will allocate the highest budget on accommodation (61%), with flights (27%) last

*This can be anything organised by the local community, anything that can circulate the income to the local community, and leaves less carbon footprint
Travellers would be most willing to pay extra for **breakfast**, **tours** and **activities**, and **room upgrades** at their accommodation.

**Top additional services travellers are willing to pay for**

- **Breakfast**: 44%
- **Tour and activities**: 29%
- **Room upgrade**: 24%
- **Spa and sauna**: 20%
- **Transport to airport or city**: 20%
- **Room service**: 20%
Travellers crave for **new and challenging travel experiences**, are interested in **less well-known destinations**, and would like to **explore more of their own country**

**Travel needs and behaviours**

- **31%**
  - I want to be challenged by my travel experiences
  - TH: 20%
  - APAC: 20%

- **18%**
  - I like to explore more of my own country
  - TH: 27%
  - APAC: 27%

- **26%**
  - I like travelling to less well-known destinations
  - TH: 21%
  - APAC: 21%

- **54%**
  - Travel makes me happy
  - TH: 51%
  - APAC: 51%

**Travel motivators**

- **56%**
  - Travel to relax
  - TH: 51%
  - APAC: 51%

- **29%**
  - Travel to learn
  - TH: 23%
  - APAC: 23%

- **28%**
  - Travel to seek new experiences with people
  - TH: 16%
  - APAC: 16%

- **26%**
  - Travel to eat
  - TH: 32%
  - APAC: 32%

Travellers eagerly anticipate a **rejuvenating holiday filled with delightful local cuisine**, while also being fuelled by their **curiosity to learn** and their **desire to connect with people** during travel.
Travellers are particularly interested in nature and scenery, food and dining, and islands and beaches.

Travellers prioritise cost by opting for budget-friendly accommodations, adopting an overall mindfulness in spending and in their choice of destination.

Top money saving strategies for travel:
- Stay at budget-friendly accommodation: 45%
- Spend less while travelling: 36%
- Select a less expensive travel destination: 33%

Top places and activities of interest during travel:
- Nature and scenery: 74%
- Food and dining: 73%
- Islands and beaches: 58%
- Famous tourist attractions and landmarks: 46%
Travellers are **highly cost sensitive**, and seek a good variety of accommodation types when choosing digital travel platforms.

### Considerations for digital travel platforms

- **Cost**: 64%
- **Variety of accommodation types**: 45%
- **Ability to book multiple aspects of a trip**: 40%
- **Financial concerns**: 57%
- **Uncertain economic outlook**: 39%
- **Fear of contracting COVID-19 or other diseases**: 36%

Travellers are concerned about their **financial situation**, the **uncertain economic outlook**, and are worried about health risks during travel.
Travellers will **read reviews**, **check out property photos**, and **compare prices** across multiple digital travel platforms before deciding on the best deal when booking accommodation online.

### Opinions about digital travel platforms

- **I like to compare prices on other digital travel platforms before deciding**
  - TH: 50%
  - APAC: 43%

- **Property photos make it easier to choose where to stay**
  - TH: 40%
  - APAC: 39%

- **I like to read online reviews prior to booking**
  - TH: 39%
  - APAC: 41%
Travellers are more likely to travel domestically if there were options that feature **nature**, an **authentic local experience**, and **promotions** from travel-related companies.

### Interests that would encourage domestic travel

- **Nature's splendour**: 71%
- **Authentic local experiences**: 42%
- **Promotion from accommodation providers and travel-related companies**: 41%
- **A natural getaway to get away from reality**: 40%
- **Contributing to the circular economy or assisting with local income generation**: 38%
- **Government-sponsored travel incentive**: 34%
- **Outdoor activities**: 20%