

Amadeus Journey of Me Insights

What Asia Pacific travellers want
(China report)

Sample size: 1,200
Amadeus Asia Pacific



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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).



INTRODUCING THE JOURNEY OF ME



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.

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

The most dominant 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. For example, while 66% of Chinese travellers do most of their trip booking on mobile, only 11% of New Zealand travellers do so. And while 70% of Japanese travellers have never used a sharing economy service for trip accommodation, 80% of Chinese travellers have.

2

The personalisation-privacy paradox

64% of Asia Pacific travellers, and likewise 63% of Chinese travellers, say they would be willing to trade personal data for more relevant offers and personalised experiences. While this presents opportunities to travel providers, they must carefully balance personalisation against rising privacy concerns. Above and beyond adhering to data protection standards and legislation, travel players must be able to articulate ‘what’s the value?’ to get travellers to share their data.

3

Get real: Recommendations they can trust

Rather than the glossy pictures of travel brochures or the carefully curated social media feeds of celebrities, Asia Pacific travellers seek what’s genuine, and turn to their fellow travellers for inspiration. When planning trips, Chinese travellers are most influenced by online booking or travel sites, followed by word of mouth from their friends, family or colleagues. Traveller reviews also hold strong sway on their opinions.

4

The right content, through the right channel, at the right time

In the world of travel, every engagement point matters. Beyond personalisation, connecting with travellers in a timely and intuitive manner is equally important. While the vast majority of Chinese 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, travel players must consider carefully how to connect with them and with what content. In China, 41% of travellers prefer to receive updates and recommendations about their trip through messaging services like WeChat.

SO WHAT DO CHINESE TRAVELLERS WANT?



KNOW ME

- _ **Personalisation or privacy?** 63% of Chinese travellers are open to sharing personal information with travel providers for more relevant and personalised offers and services, but of this only 9% say they are 'very open' to sharing, compared to 15% of APAC travellers who say the same.
- _ **Big screens vs small screens:** Usage of mobile phones to research and book trips is much more prolific in China than in most other APAC markets. In fact, China has the highest mobile usage for booking trips in the region. Together with Indonesia, they are the only markets in APAC where trip booking is done on mobile phones more than on laptops/desktops.
- _ **Recommendations that matter:** While APAC travellers in general are most interested in recommendations that help them save money, this ranks only third amongst Chinese travellers. What the Chinese traveller finds more useful are recommendations that help them identify the best sightseeing options, or that ensure their safety.
- _ **Who knows better:** Chinese travellers (62%) overwhelmingly say that online booking sites have sent them relevant travel recommendations compared to other platforms. This is also much higher than the regional average of 50%. This points to the success of home-grown online travel brands like Ctrip and Tuniu in capturing the trust and loyalty of their Chinese home base.

INSPIRE ME

- _ **Opportunities to inspire:** Most Chinese travellers (41%) plan their travel while they are on holiday, compared to only 25% of APAC travellers who do so. This perhaps points towards a preference for spontaneity amongst Chinese travellers, who want to plan-as-they-go while travelling.
- _ **The influencers:** When planning trips, Chinese travellers are most influenced by online booking or travel sites, followed by word of mouth from their friends, family or colleagues. Traveller reviews also hold strong sway on their opinions.
- _ **New technology:** Chinese travellers are particularly interested in an augmented reality mobile app that delivers digital overlays at destination, providing interactive information about the site they are visiting.

CONNECT ME

- _ **Reasons to stay connected:** Chinese travellers are more likely than the average APAC traveller to want to stay connected in order to share pictures and experiences with their friends and family. On the other hand, they are significantly less likely to want to stay connected to keep up to date with the world, or to research things to do at the destination.
- _ **How to get connected:** Most Chinese travellers use Wi-Fi (59%) to stay connected when they are travelling abroad, although this dependency is much lower than for APAC travellers in general (71%). Instead, they are slightly more likely to depend on hotel-provided free data and local calls (41%), or international phone/data packages (40%).
- _ **Apps that add value:** Ctrip is the top mobile app that Chinese travellers say adds value to their trips. While 24% of Chinese travellers say they do not use any apps for travelling, this is much lower compared to many other APAC countries.

TALK TO ME

- _ **A good time to 'talk':** APAC travellers in general are very open to receiving travel recommendations throughout the travel journey, but Chinese travellers even more so! However, interest peaks at the earliest stages of the trip cycle, and goes down towards the end.
- _ **"You can reach me via...":** messaging services. Chinese travellers show a much stronger preference for receiving updates and recommendations about their trip through messaging services like WeChat (41%) compared to travellers in all other markets – only 20% of APAC travellers in total selected that option. On the other hand, Chinese travellers are much less inclined to want these updates through email (12%) which is the most preferred option amongst APAC travellers.

DELIGHT ME

- _ **New world, new options:** Compared to APAC travellers in general, Chinese travellers show higher usage of sharing economy services and apps. Fewer Chinese travellers (10%) say they have never used transport apps, or accommodation apps (20%) compared to other APAC travellers. Convenience is the top reason cited for using these services and apps.
- _ **Speak my language:** Chinese travellers are more likely than APAC travellers in general to seek local offerings at the destination. 46% seek food and beverages from their home country (APAC: 36%), 73% want service staff that speak a language they understand (APAC: 47%), and 72% seek tour guides that speak a language they understand (APAC: 46%).
- _ **Great expectations:** 15% of Chinese travellers say that a travel provider has never exceeded their expectations. Gen X Chinese travellers seem to be the hardest to please, with 23% of them saying they have never had a travel provider exceed their expectations, compared to only 13% of Millennials and 14% of Baby boomers who state the same.

CARE FOR ME

- _ **Travel stoppers:** Chinese travellers tend to be more sensitive to adverse events. In general they are more likely than the average APAC traveller to avoid a destination due to recent or potential adverse events. They are particularly sensitive to recent terror attacks and recent political or social uprisings.
- _ **Safety updates:** Chinese travellers rely most heavily on booking sites to give them safety and security updates. More so than APAC travellers do. On the other hand they seem to be less dependent on official sources like their embassy/ government or immigration/ border security.

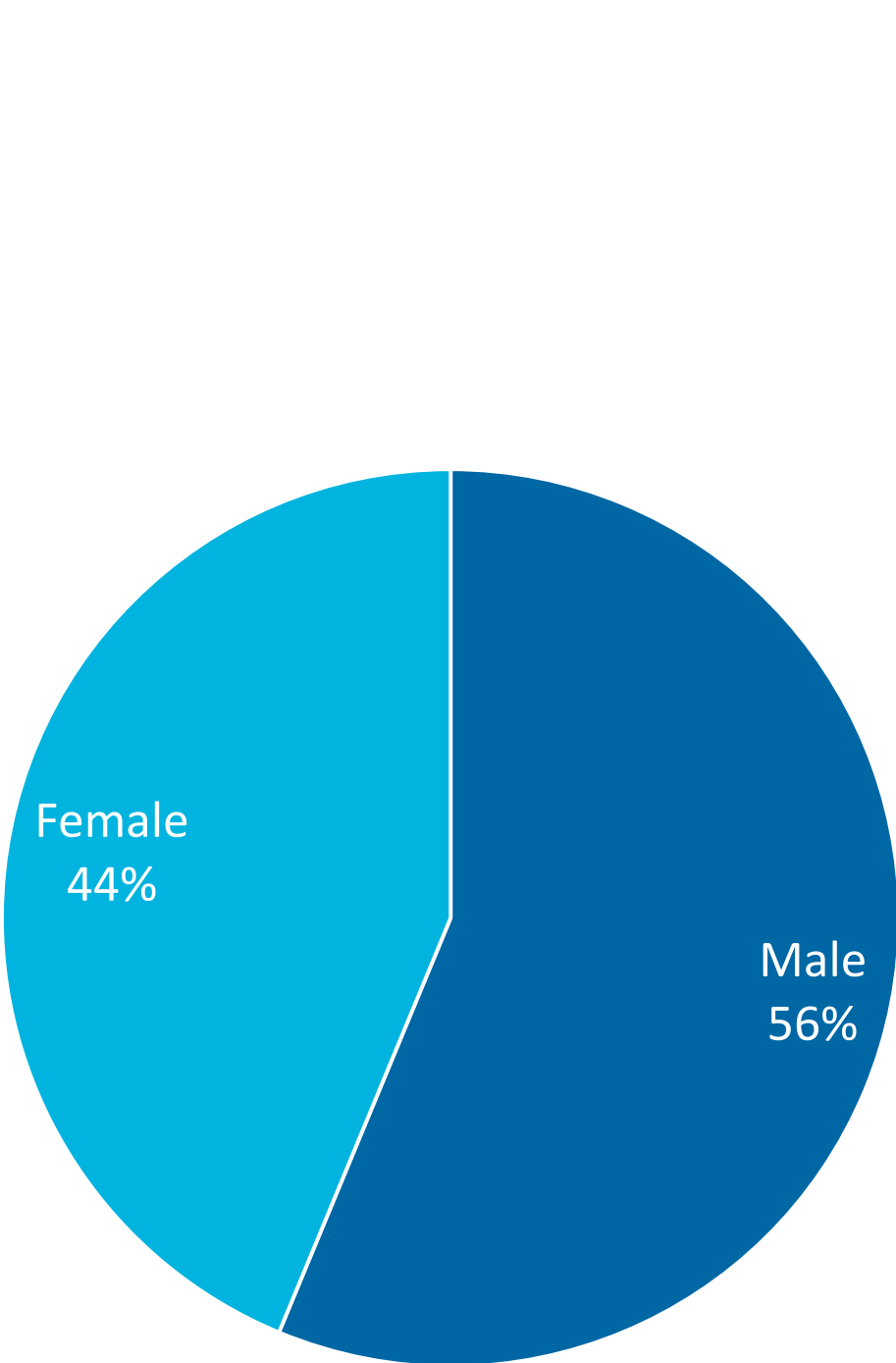
Demographic overview

Who we surveyed

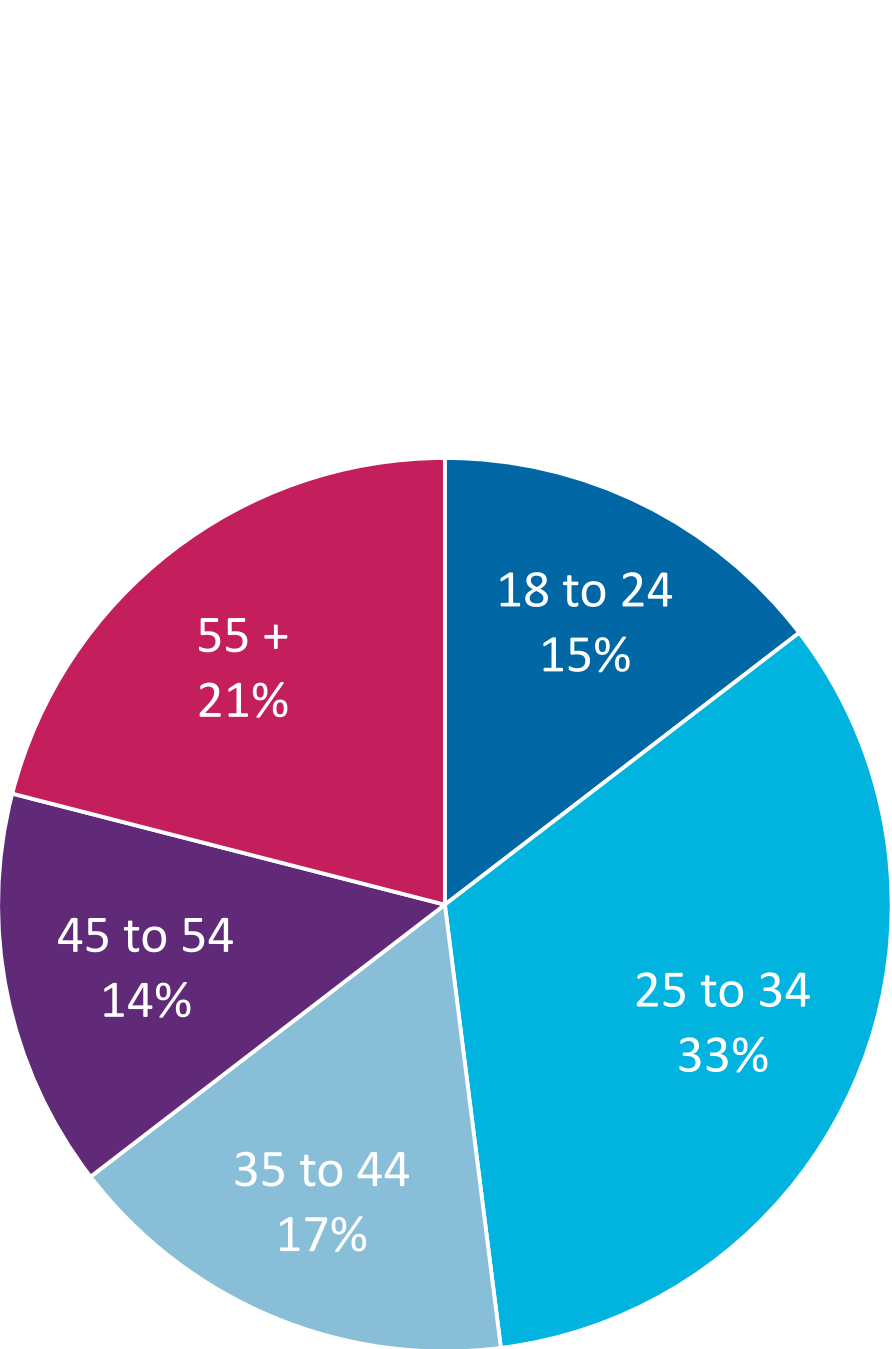


DEMOGRAPHIC OVERVIEW

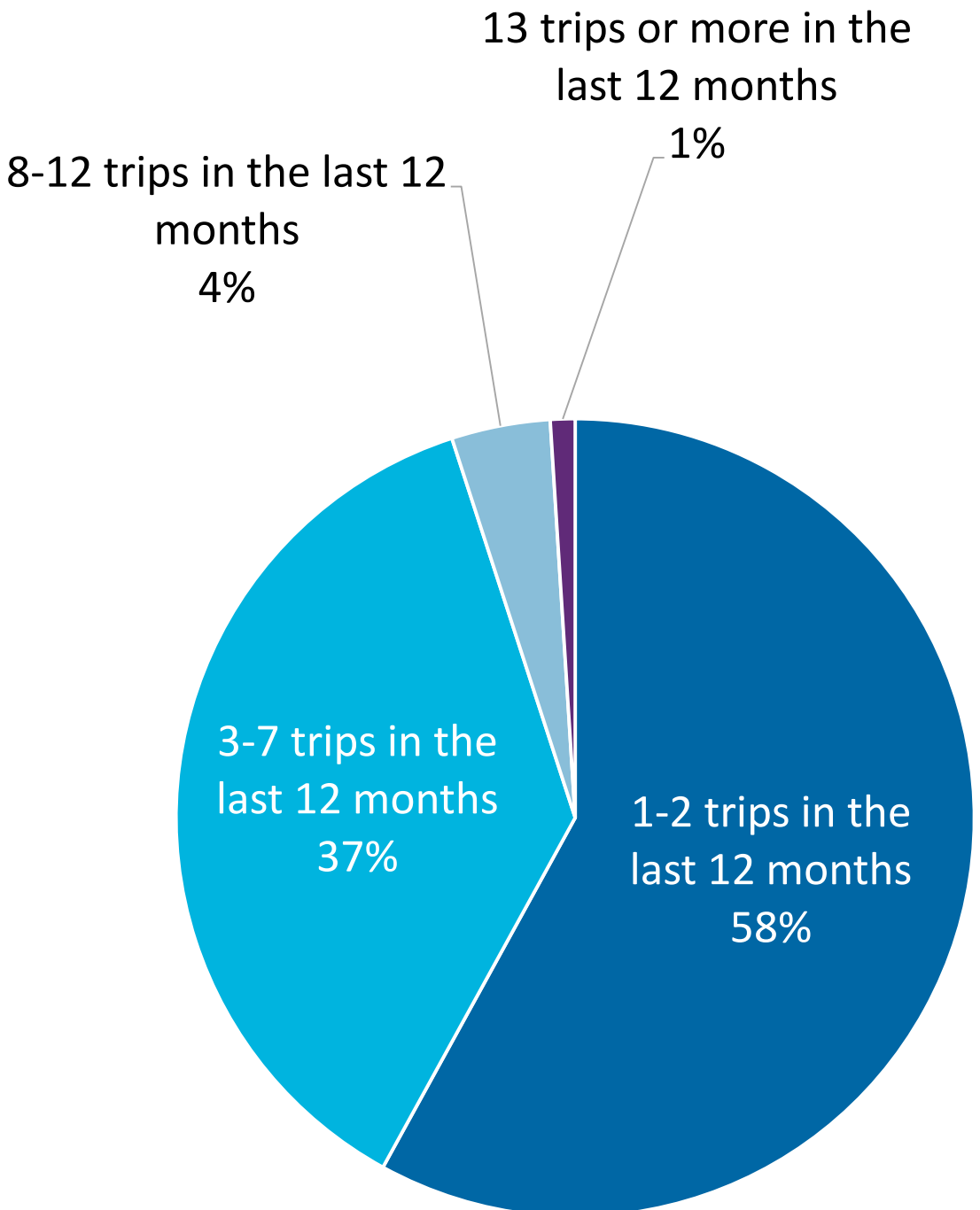
A snapshot



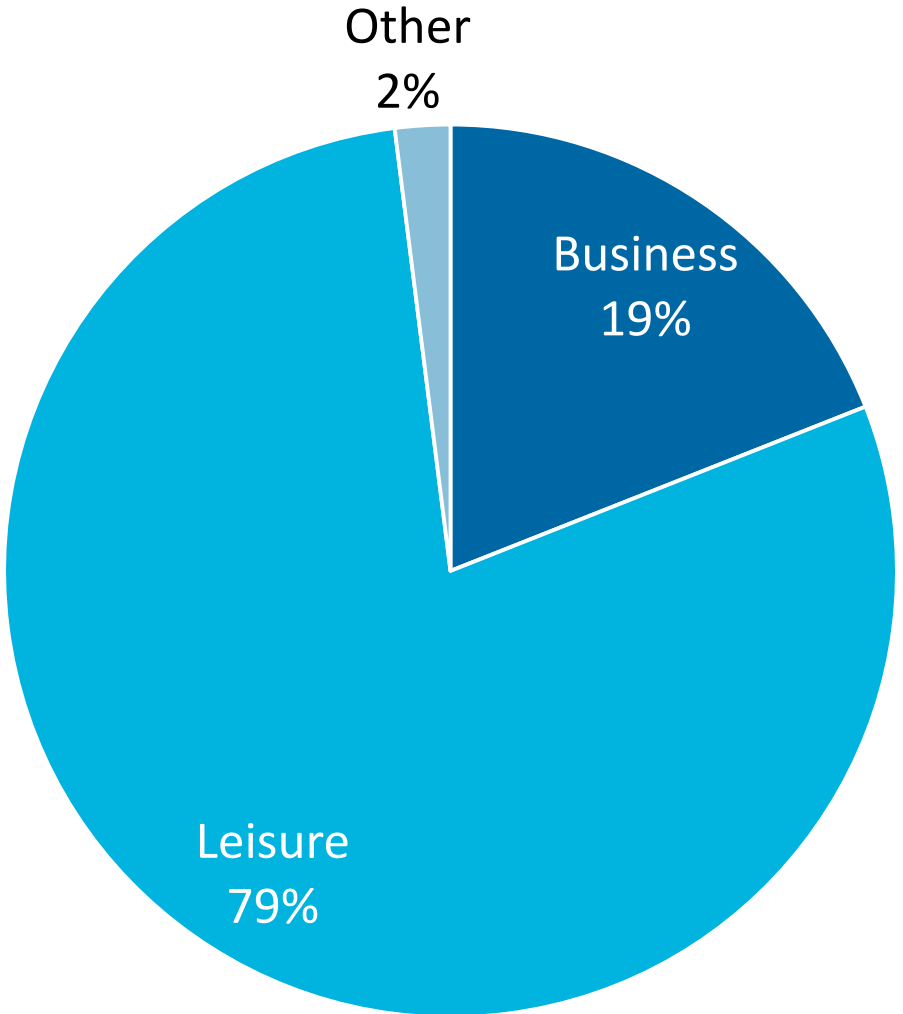
Gender



Age



Travel frequency
(number of trips made in the past 12 months)



Primary reason for travel

Know Me

and what I want, before I even want it



KNOW ME

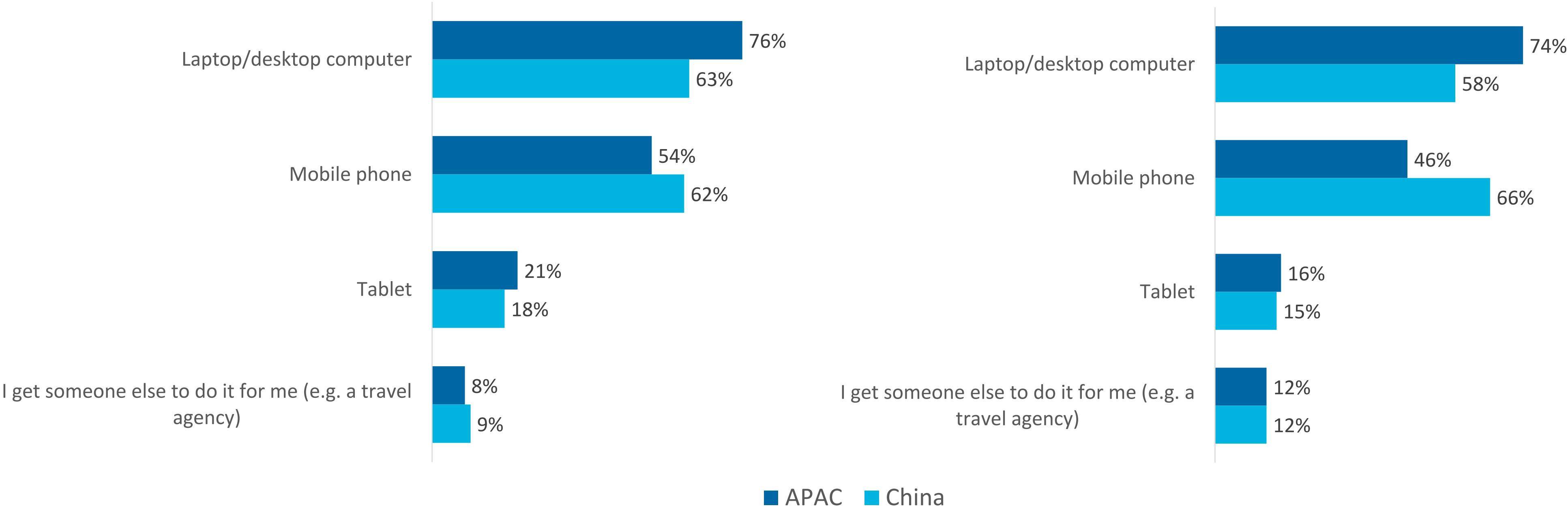
Q1. When it comes to researching your trip and making a booking, which device(s) do you use most? *Select all that apply.*



Usage of mobile phones to research and book trips is much more prolific in China than in most other APAC markets. In fact, China has the highest mobile usage for booking trips in the region. Together with Indonesia, they are the only markets in APAC where trip booking is done on mobile phones more than on laptops/desktops.

Devices used most for researching trips

Devices used most for booking trips



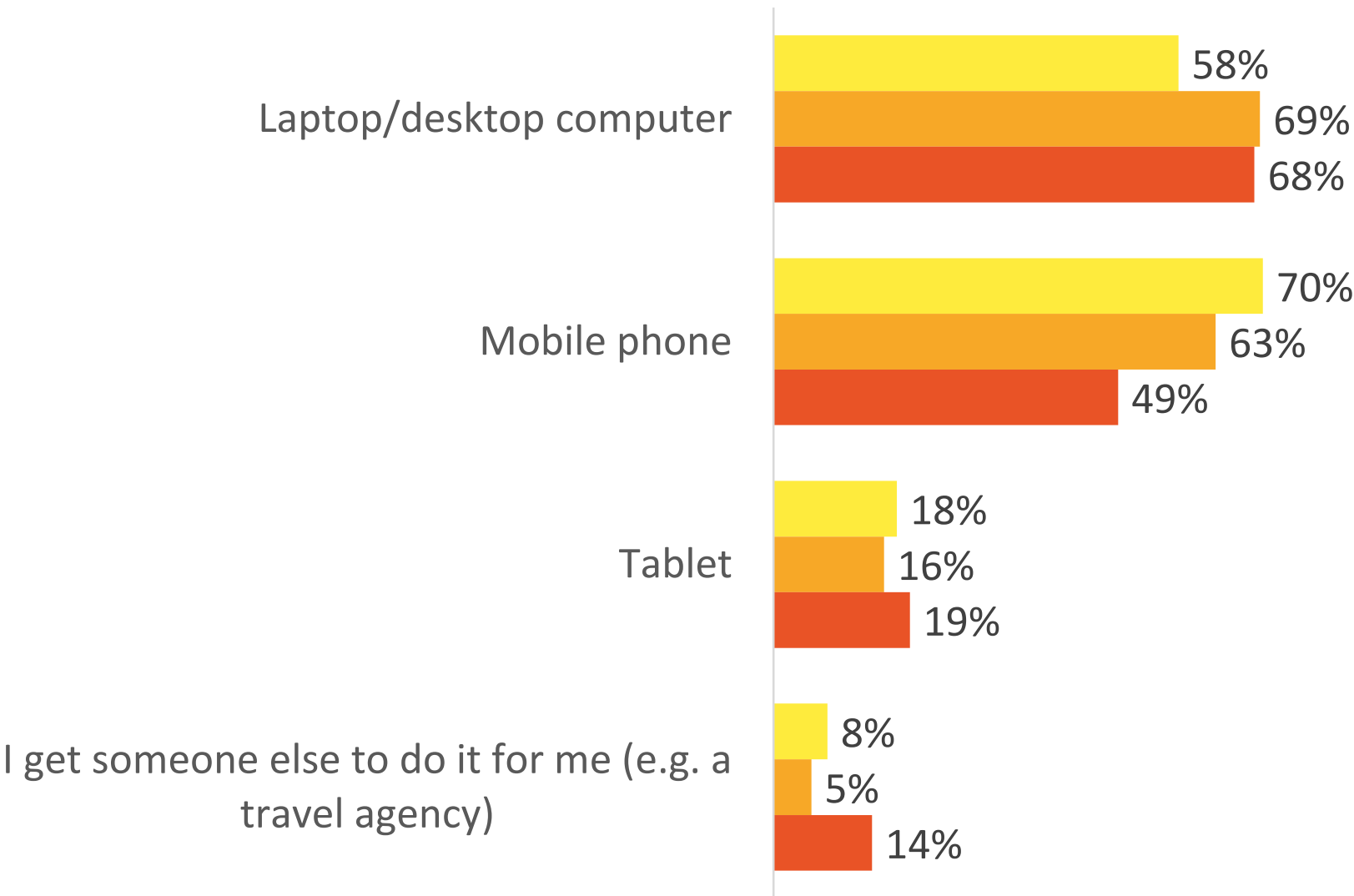
KNOW ME

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

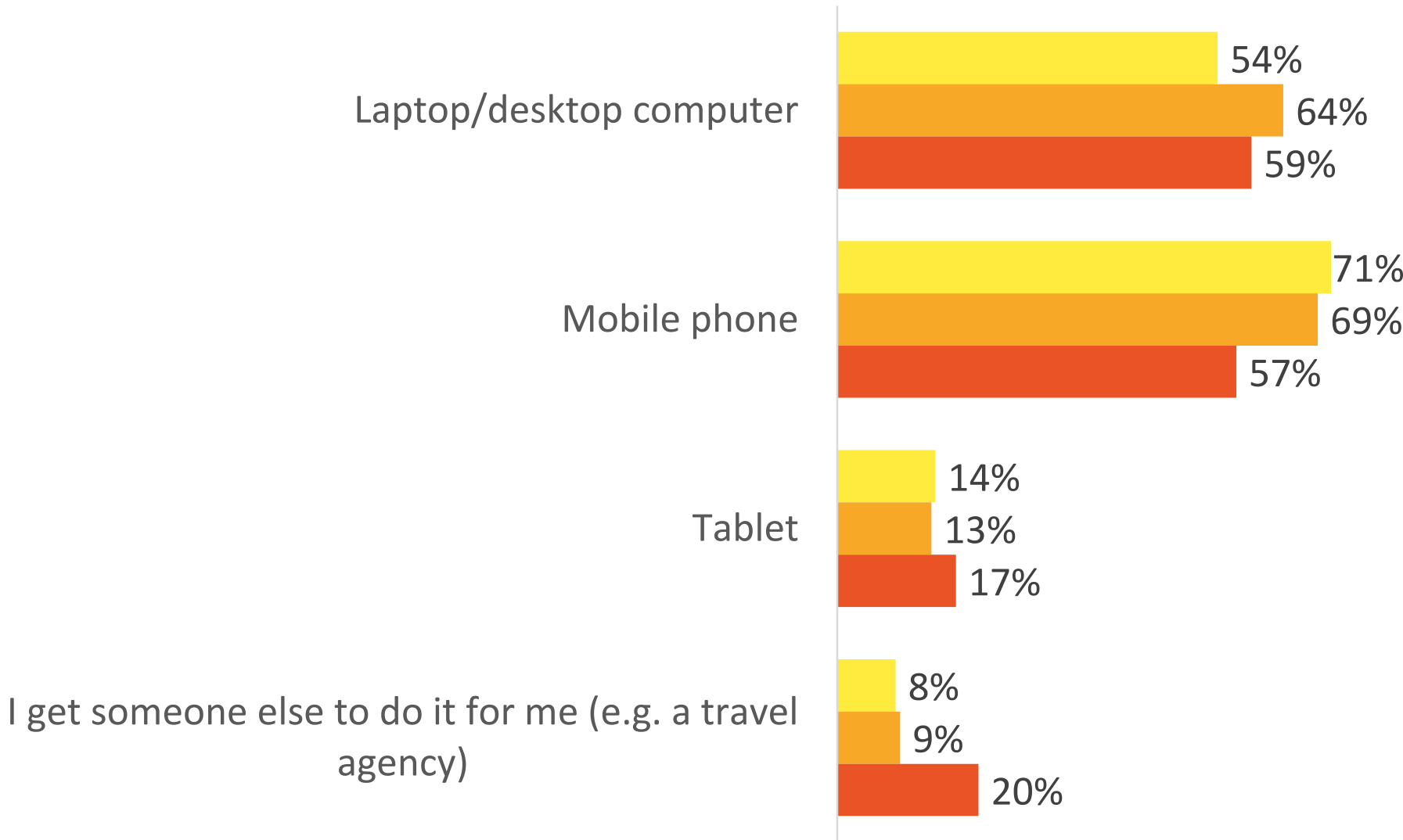


Perhaps unsurprisingly, mobile phone usage is highest amongst Chinese Millennial travellers, while Baby Boomers show a stronger preference for getting travel agencies to research and book trips for them.

Devices used most for researching trips



Devices used most for booking trips



■ 18-35 (Millennials) ■ 36-51 (Generation X) ■ 52-70 (Baby boomers)

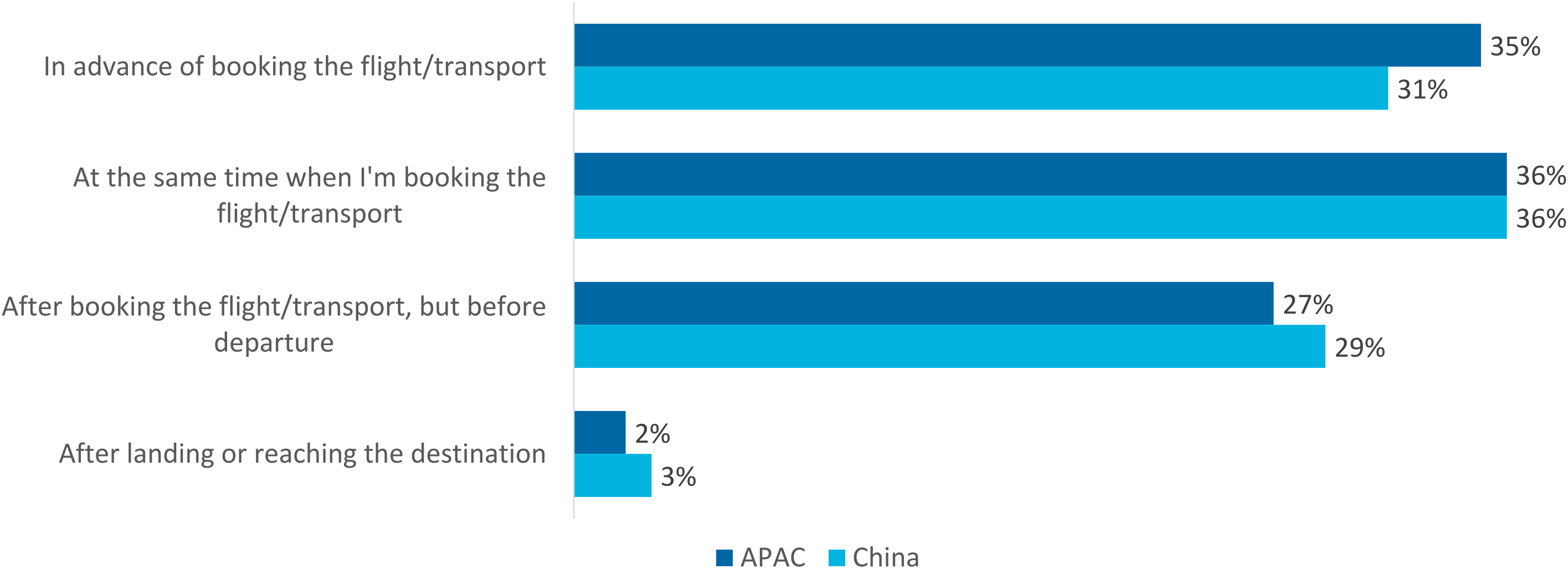
KNOW ME

Q2. When do you usually book your accommodation for a trip?

Chinese traveller behaviour when it comes to booking their accommodation in relation to the flight is in line with the APAC average. There is no dominant preference for whether they choose to book accommodation before, at the same time as, or after the flight.



When do travellers book accommodation



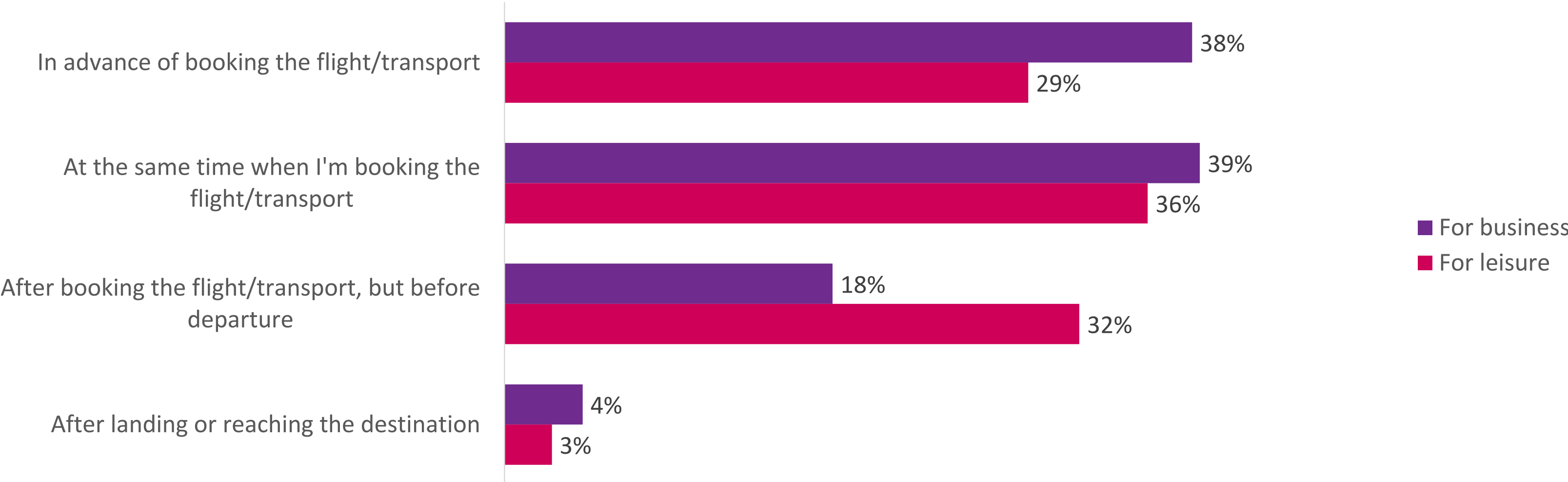
KNOW ME

(Continued) Q2. When do you usually book your accommodation for a trip?

However, Chinese travellers that travel mostly for business would be less inclined than leisure travellers to book their accommodation after they have booked the flight/transport. Most of them prefer to book accommodation either before booking the flight (38%) or at the same time (39%).



When do Taiwanese travellers book accommodation



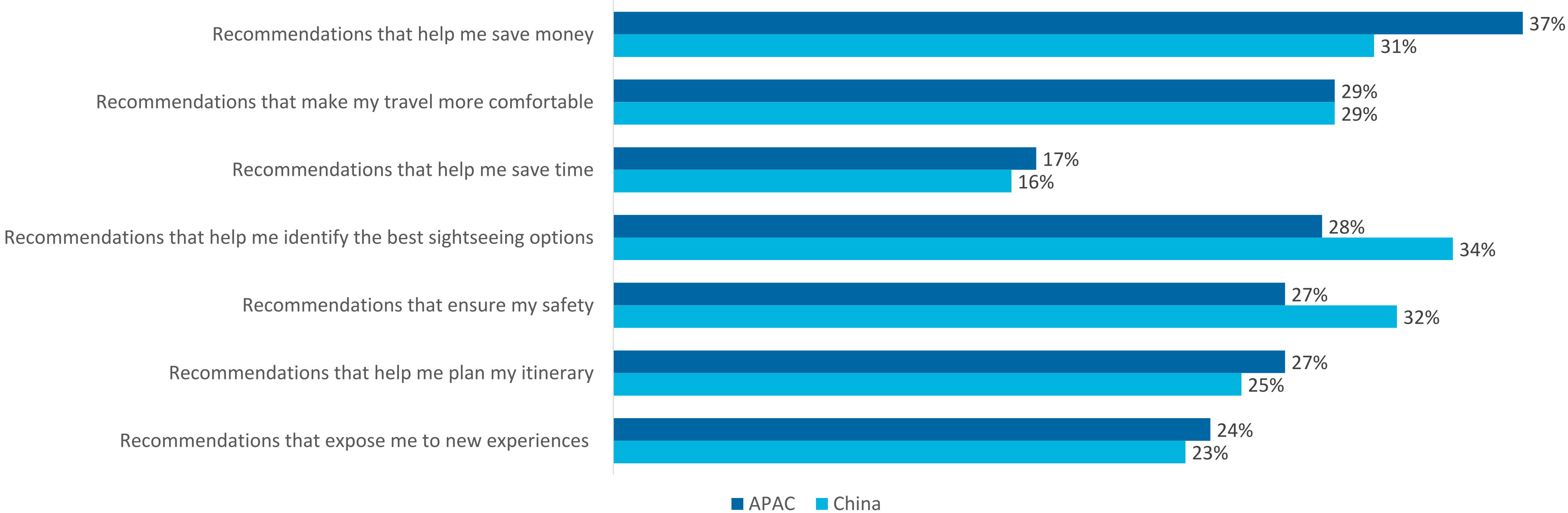
KNOW ME

Q3. When you travel for leisure, what types of travel recommendations do you find most useful? *Please select the top two.*



While APAC travellers in general are most interested in recommendations that help them save money, this ranks only third amongst Chinese travellers. What the Chinese traveller finds more useful are recommendations that help them identify the best sightseeing options, or that ensure their safety

Most useful recommendations for leisure travel



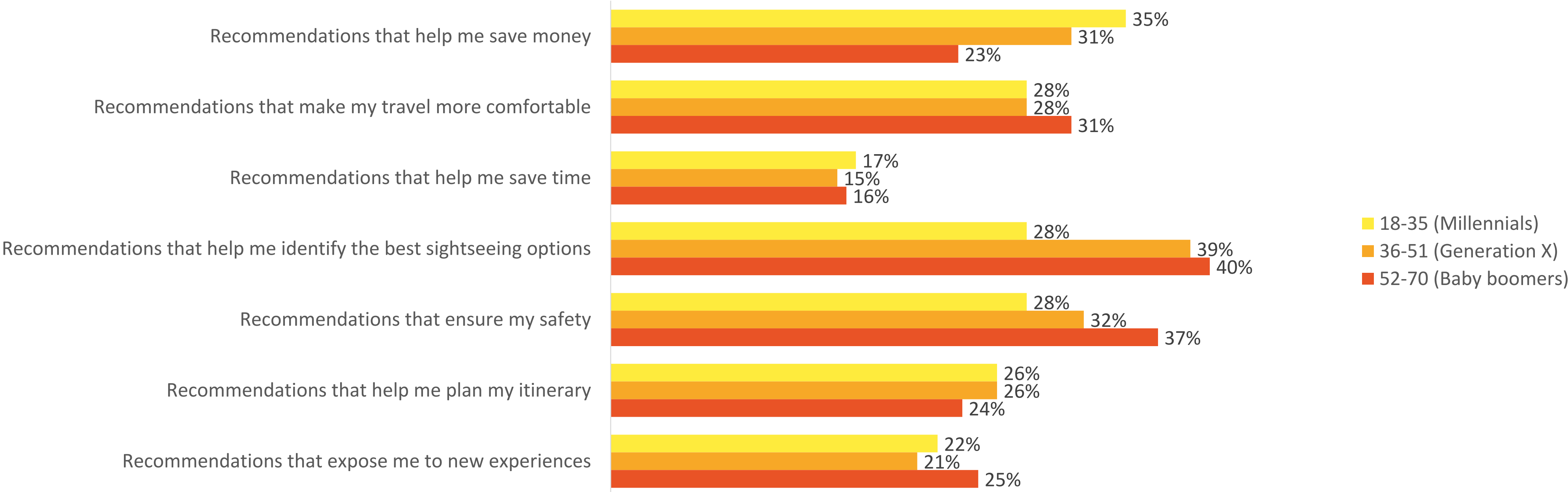
KNOW ME

(Continued) Q3. When you travel for leisure, what types of travel recommendations do you find most useful? *Please select the top two.*

Chinese Millennial travellers show higher interest in recommendations that help them save money compared to older travellers. Gen X and Baby Boomers however, choose recommendations that help them identify the best sightseeing options.



Most useful recommendations for leisure travel



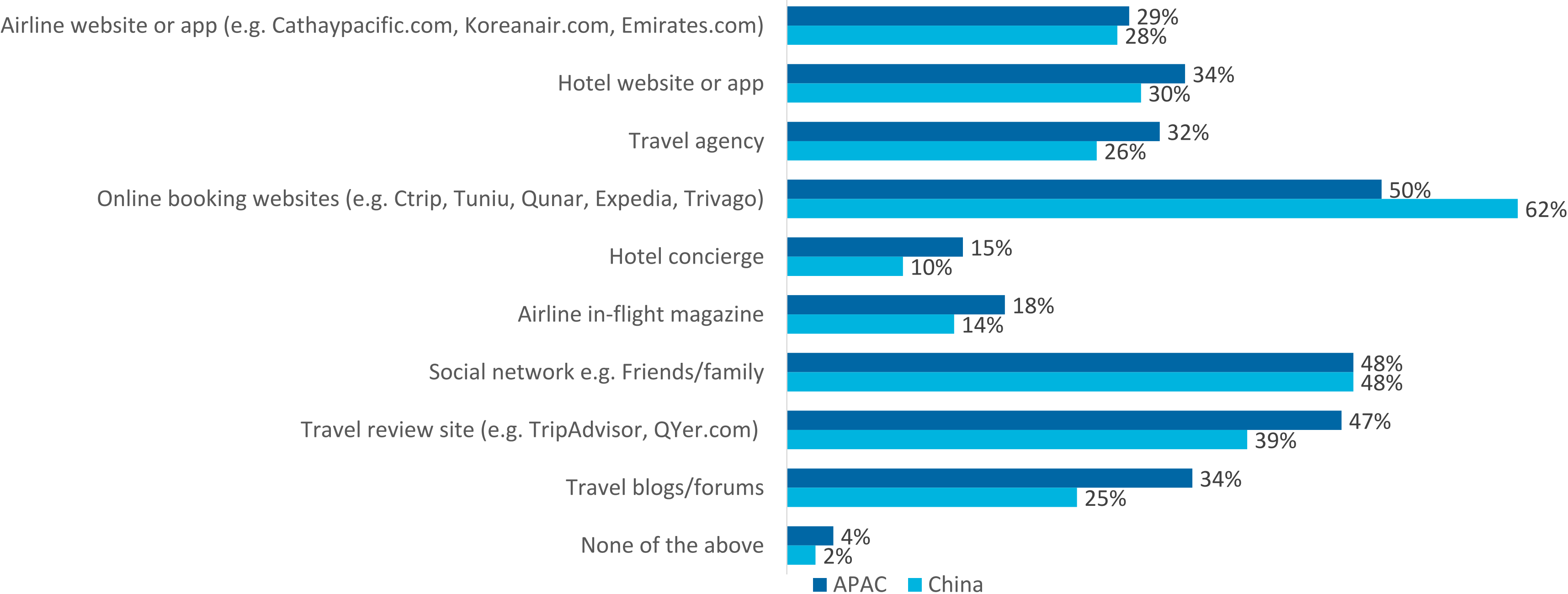
KNOW ME

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*



Chinese travellers (62%) overwhelmingly say that online booking sites have sent them relevant travel recommendations compared to other platforms. This is also much higher than the regional average of 50%. This points to the success of home-grown online travel brands like Ctrip and Tuniu in capturing the trust and loyalty of their Chinese home base.

Platforms that have sent travellers relevant travel recommendations



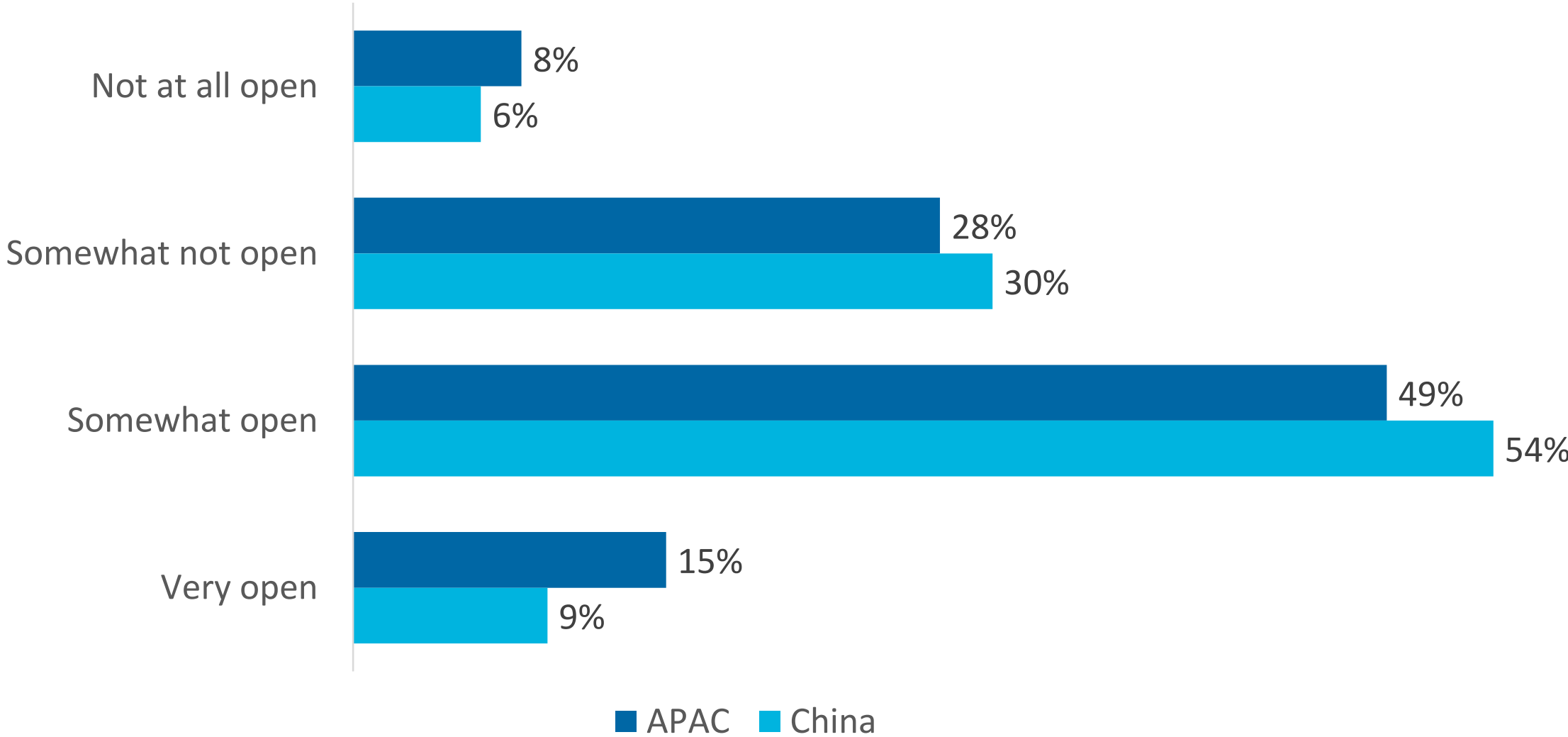
KNOW ME

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?

63% of Chinese travellers are open to sharing personal information with travel providers for more relevant and personalised offers and services, but of this only 9% say they are 'very open' to sharing, compared to 15% of APAC travellers who say the same.



Openness to sharing personal information with travel providers



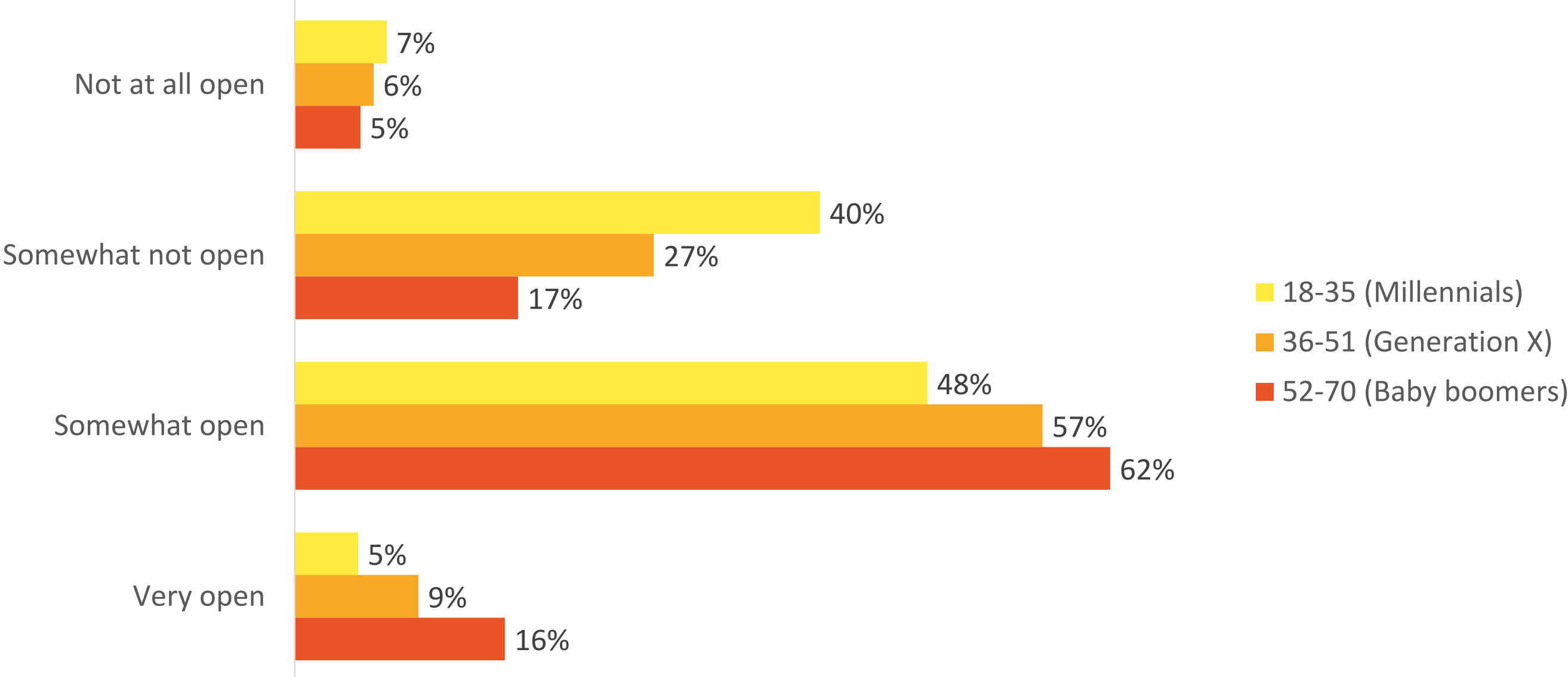
KNOW ME

(Continued) 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?

Surprisingly, Chinese Millennials are less open to sharing their personal information compared to Gen X and Baby Boomers. Baby Boomers in fact are most open with their data, with 88% of them 'somewhat open' or 'very open' to sharing it.



Openness to sharing personal information with travel providers



Inspire Me

about the endless possibilities around travel and technology



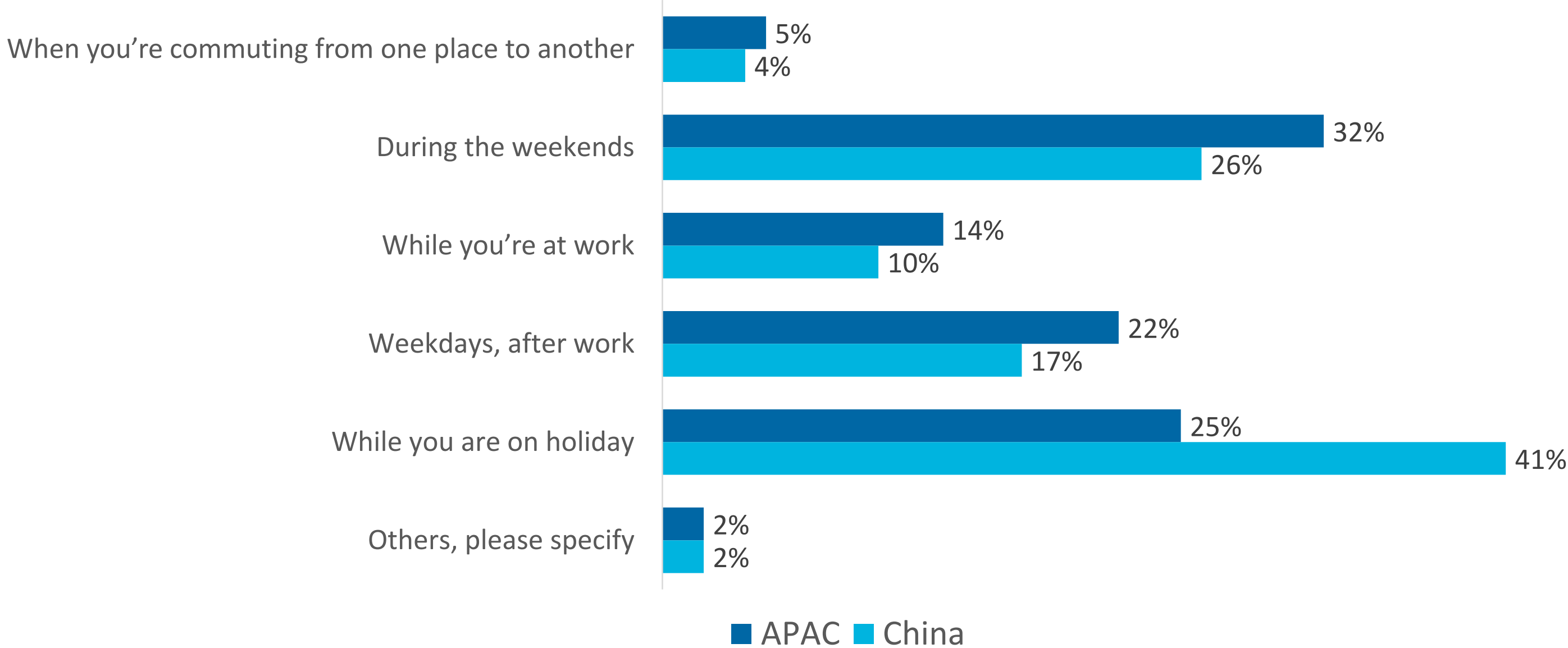
INSPIRE ME

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

Most Chinese travellers (41%) plan their travel while they are on holiday, compared to only 25% of APAC travellers who do so. This perhaps points towards a preference for spontaneity amongst Chinese travellers, who want to plan-as-they-go while travelling.



When do travellers plan their travels



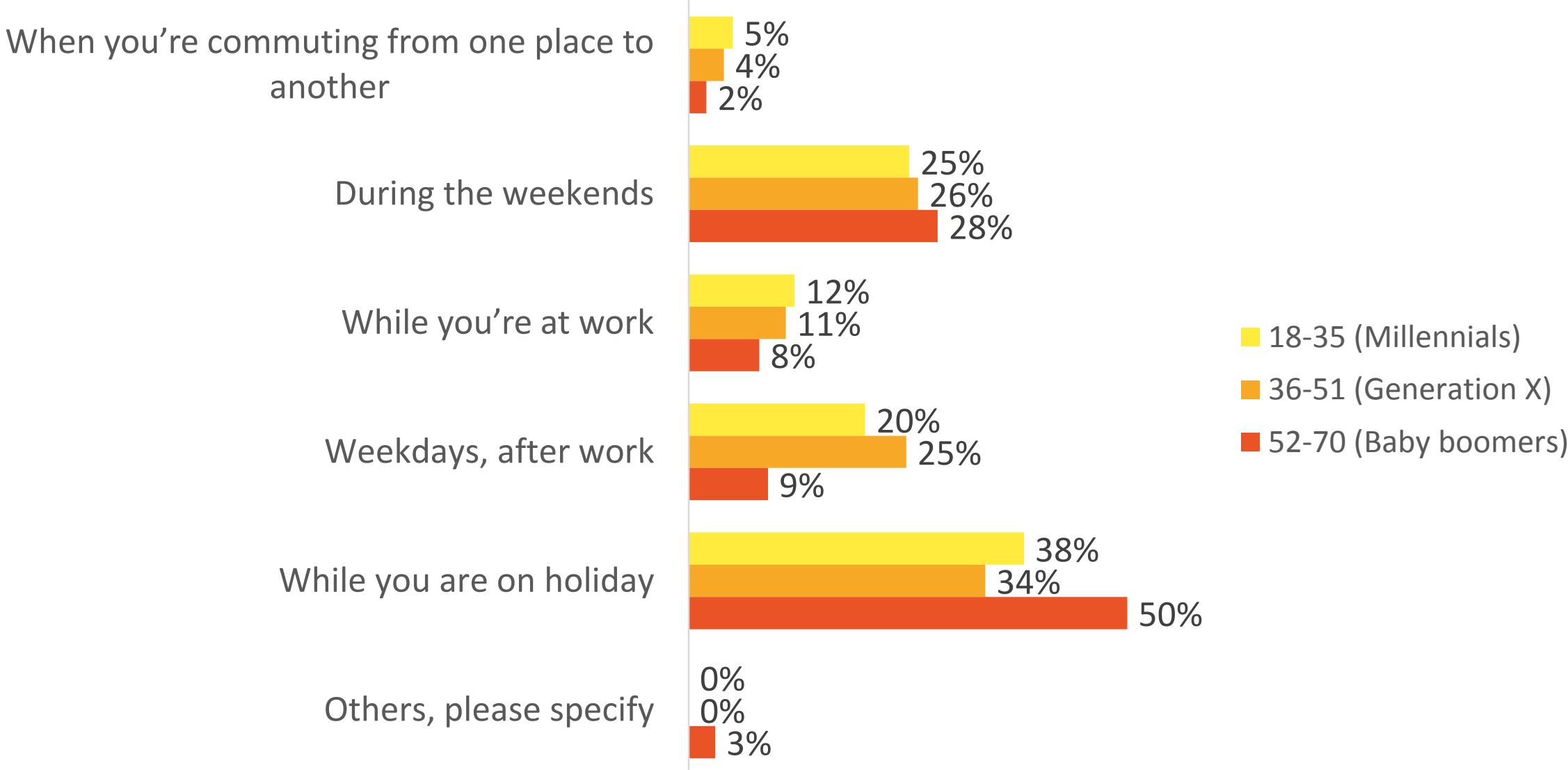
INSPIRE ME

(Continued) Q6. When do you do most of your travel planning?

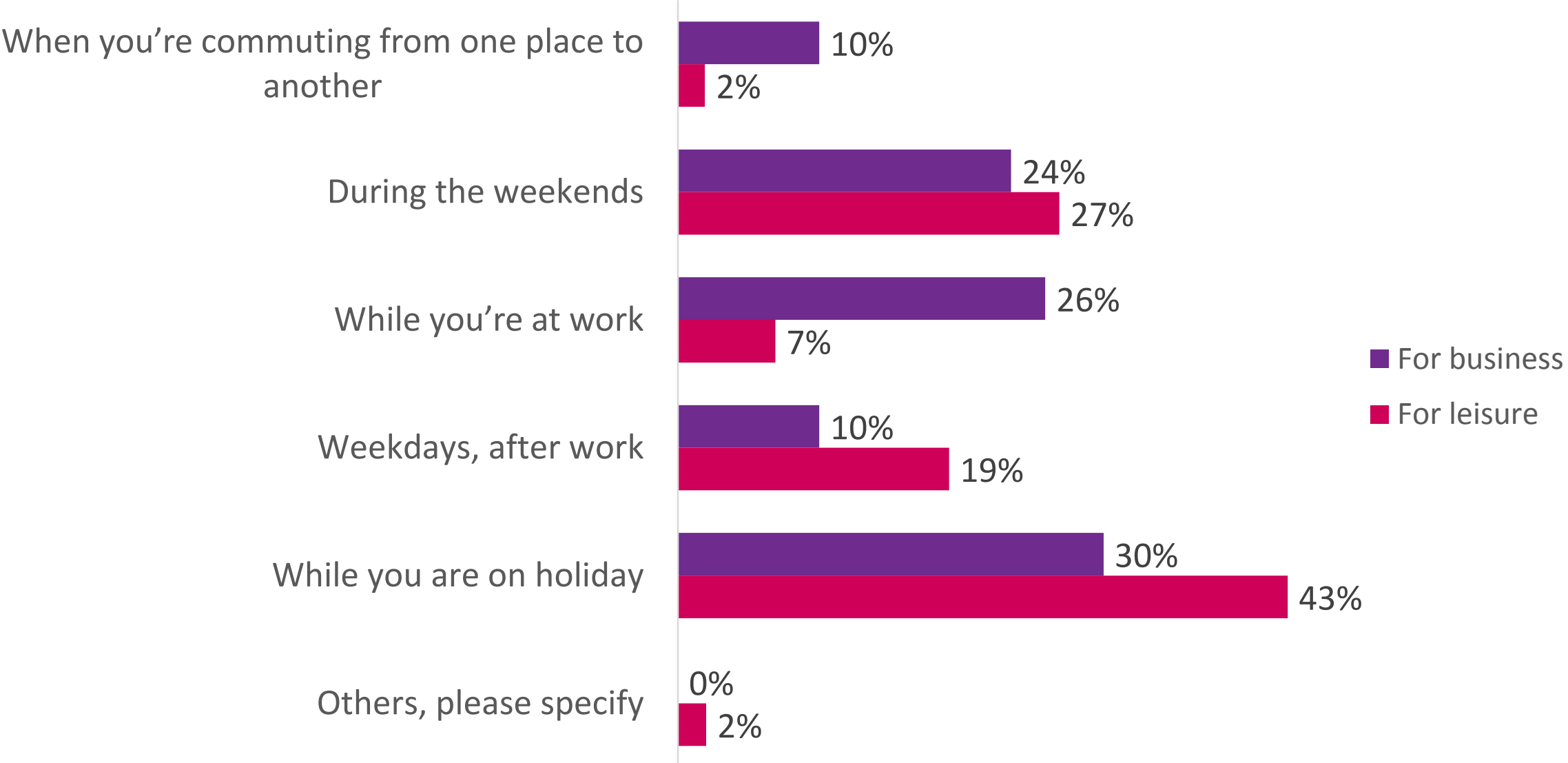
Interestingly, Baby Boomers are much more likely to do their travel planning while on holiday (50%) compared to Millennial (38%) and Gen X (34%) travellers. Also, travellers who travel mostly for business do a lot more travel planning at work (26%) than leisure travellers (7%), and while commuting between locations (10% vs 2%)



By age



By main reason for travel



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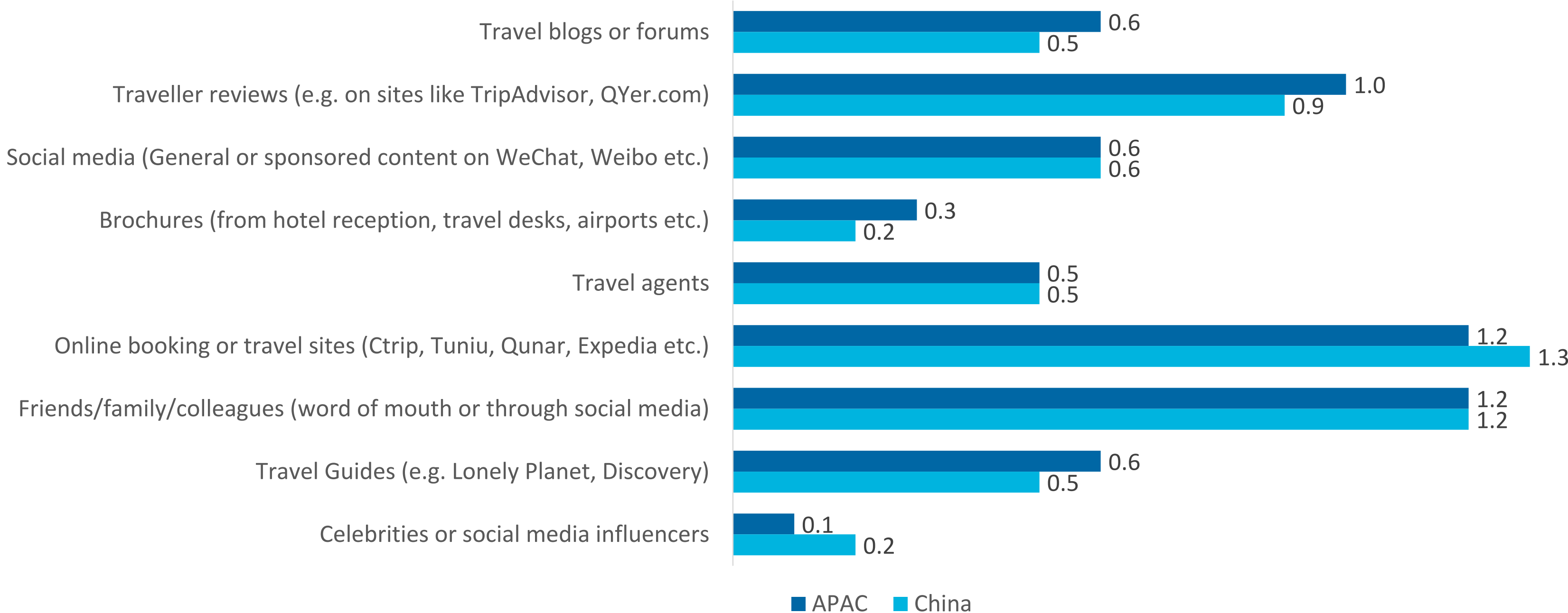
INSPIRE ME

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



When planning trips, Chinese travellers are most influenced by online booking or travel sites, followed by word of mouth from their friends, family or colleagues. Traveller reviews also hold strong sway on their opinions.

Sources that influence travellers’ trip planning



*Scoring: Rank 1=3, rank 2=2, rank 3=1, otherwise=0, average score of each option is presented.

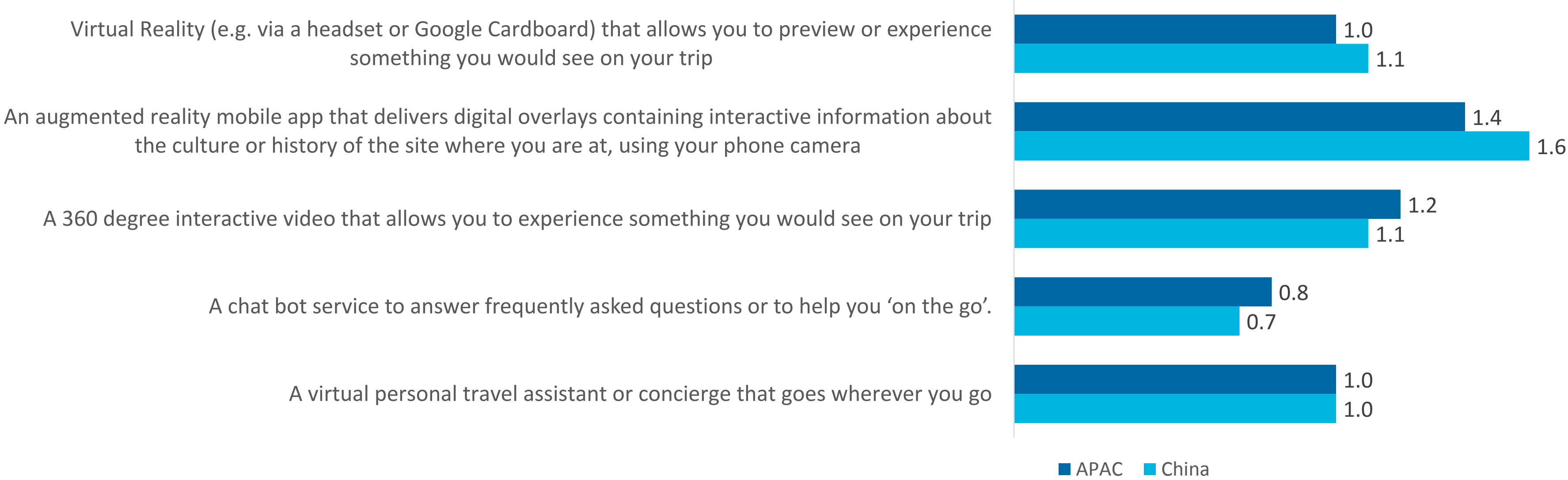
INSPIRE ME

Q8. Rank the following new technologies from highest to lowest, based on your interest in using them for planning or while on a trip.

Chinese travellers are particularly interested in an augmented reality mobile app that delivers digital overlays at destination, providing interactive information about the site they are visiting.



New technologies travellers are most interested in



*Scoring: Rank 1=3, rank 2=2, rank 3=1, otherwise=0, average score of each option is presented.

Connect Me

so I can stay in touch with what's important to me



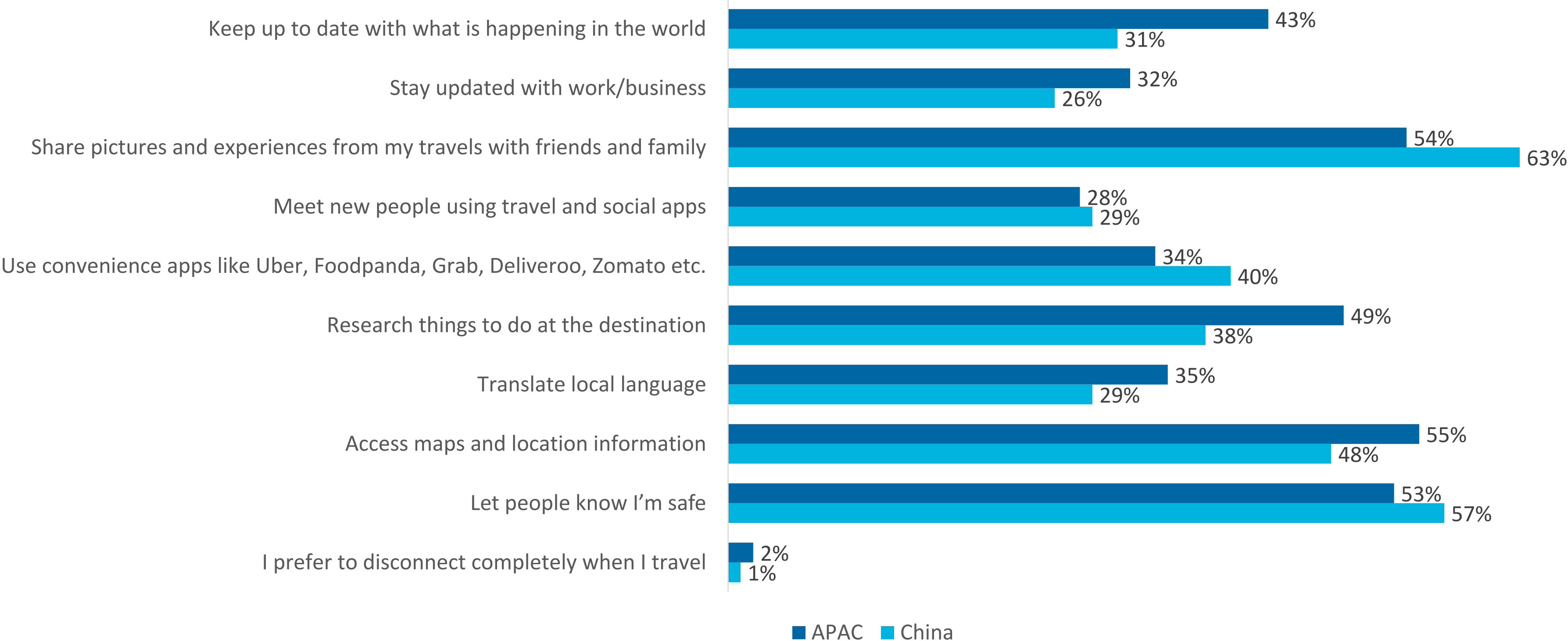
CONNECT ME

Q9. Why do you want to stay connected when you travel?

Chinese travellers are more likely than the average APAC traveller to want to stay connected in order to share pictures and experiences with their friends and family. On the other hand, they are significantly less likely to want to stay connected to keep up to date with the world, or to research things to do at the destination.



Why travellers want to stay connected when travelling



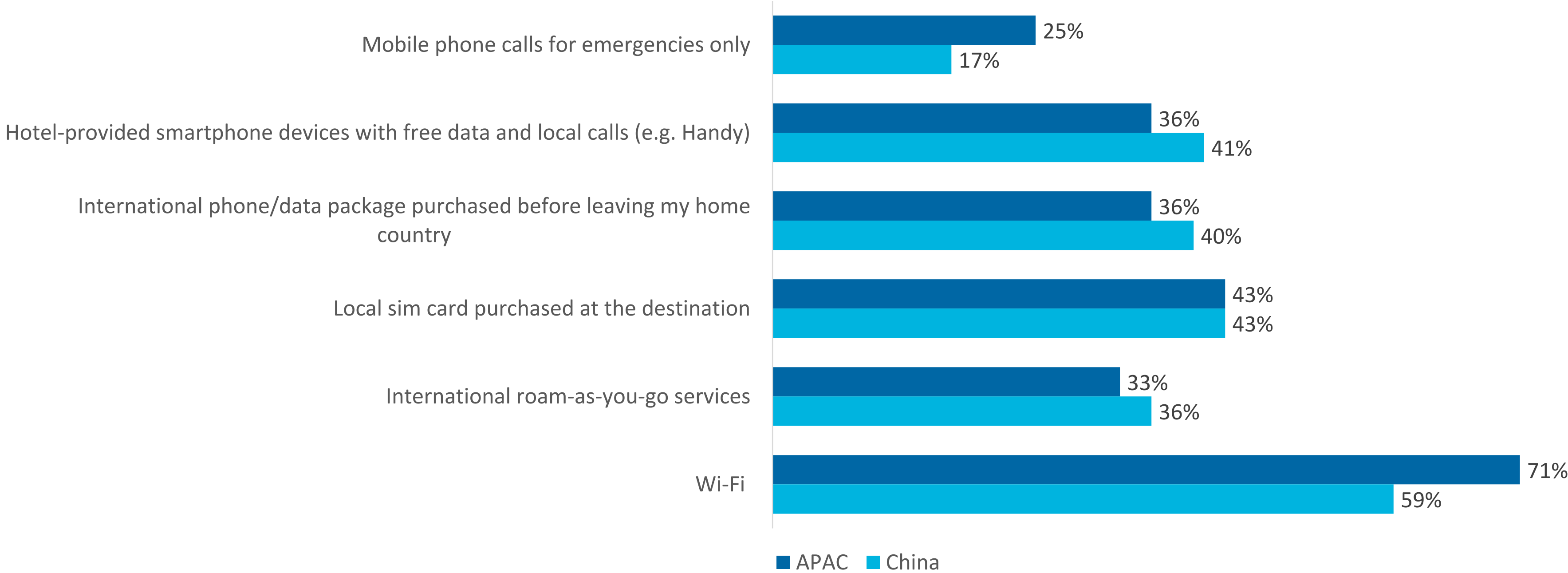
CONNECT ME

Q10. How do you choose to stay connected when you are travelling abroad?
Select all that apply



Most Chinese travellers use Wi-Fi (59%) to stay connected when they are travelling abroad, although this dependency is much lower than for APAC travellers in general (71%). Instead, they are slightly more likely to depend on hotel-provided free data and local calls (41%), or international phone/data packages (40%).

How travellers choose to stay connected when travelling abroad



CONNECT ME

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'

Ctrip is the top mobile app that Chinese travellers say adds value to their trips, followed by WeChat and Tuniu. China is the only market where the top mobile apps used are all local apps.

While 24% of Chinese travellers say they do not use any apps for travelling, this is much lower compared to many other APAC countries.

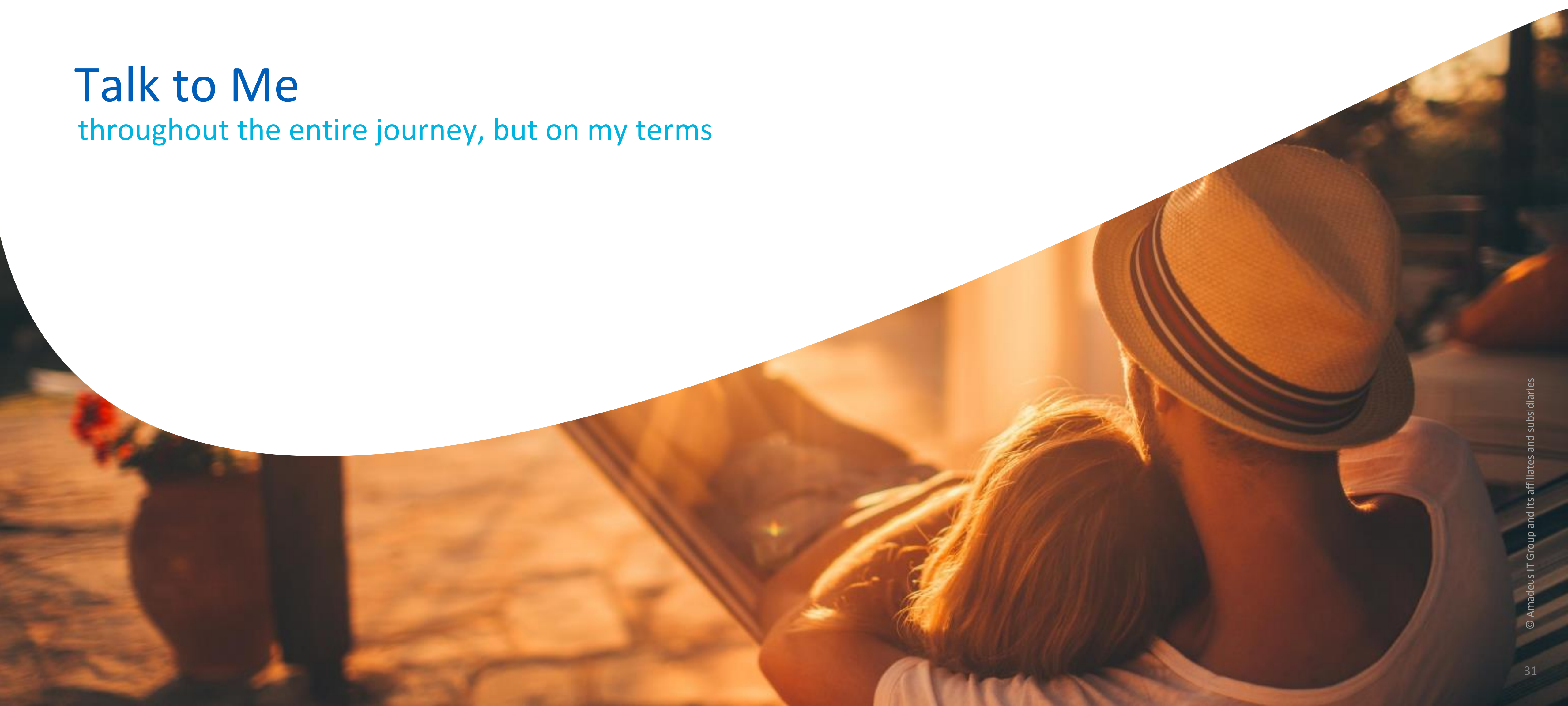


Top 3 mobile apps used while travelling



Talk to Me

throughout the entire journey, but on my terms

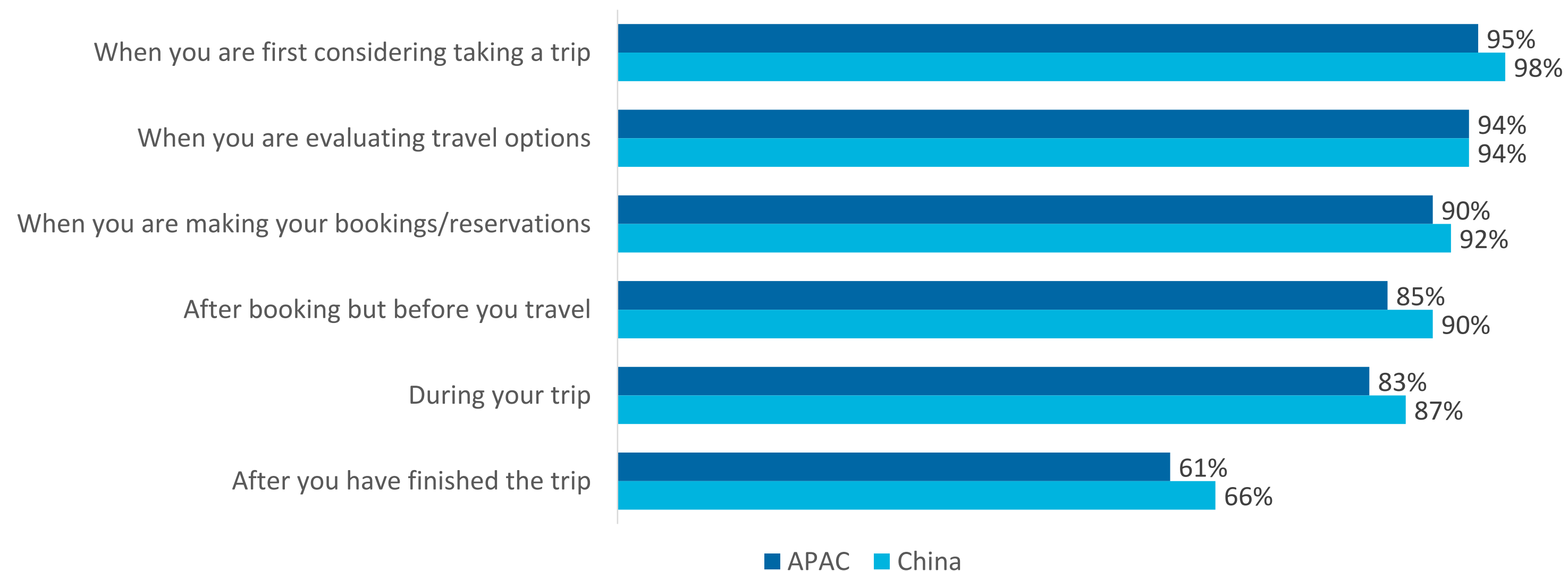


TALK TO ME

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?

APAC travellers in general are very open to receiving travel recommendations throughout the travel journey, but Chinese travellers even more so! However, interest peaks at the earliest stages of the trip cycles, and goes down towards the end.

% of travellers interested in receiving travel-based recommendations...



** Percentage of respondents choosing 'Interested' and 'Very interested' for each option is presented.*

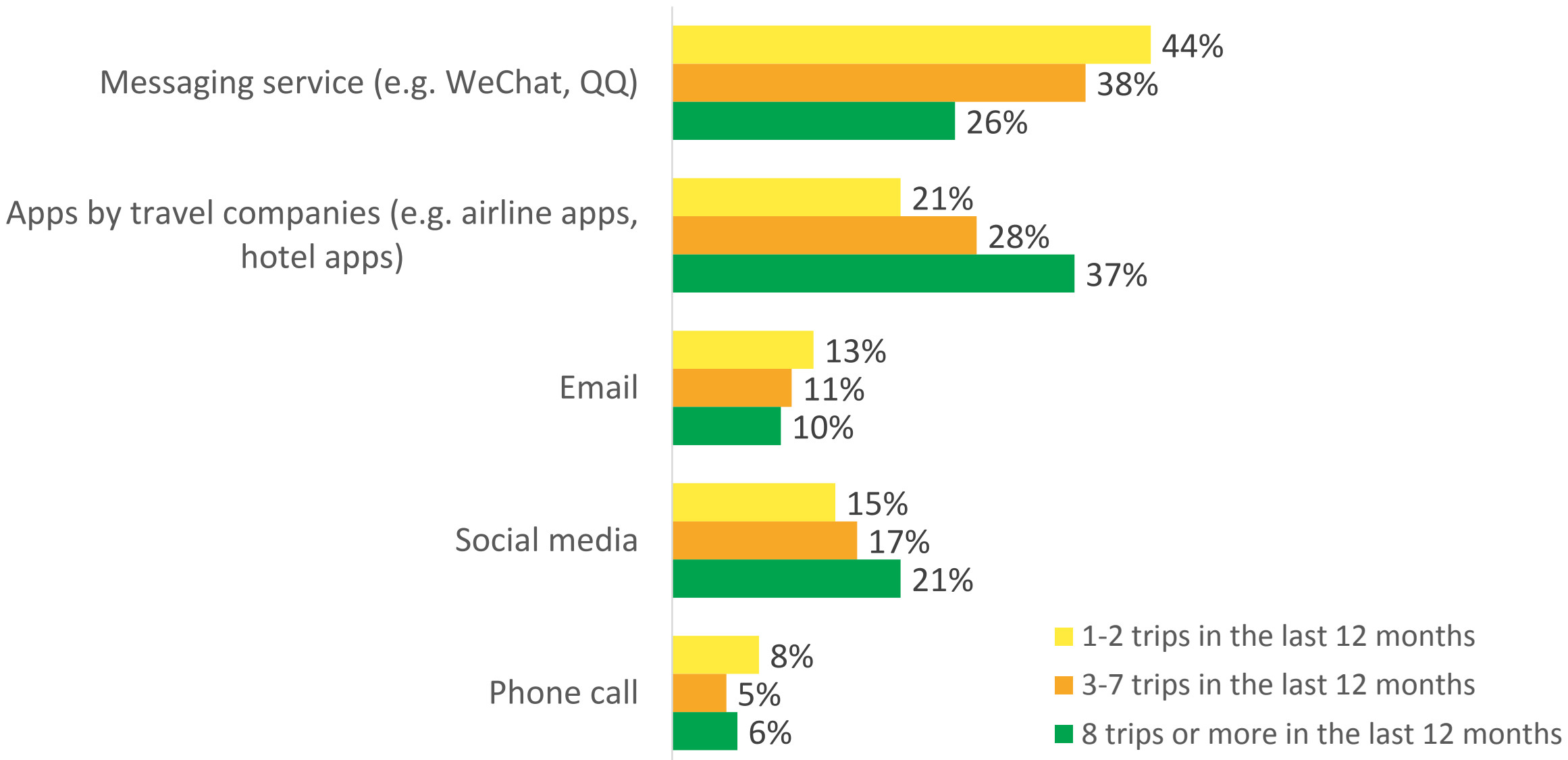
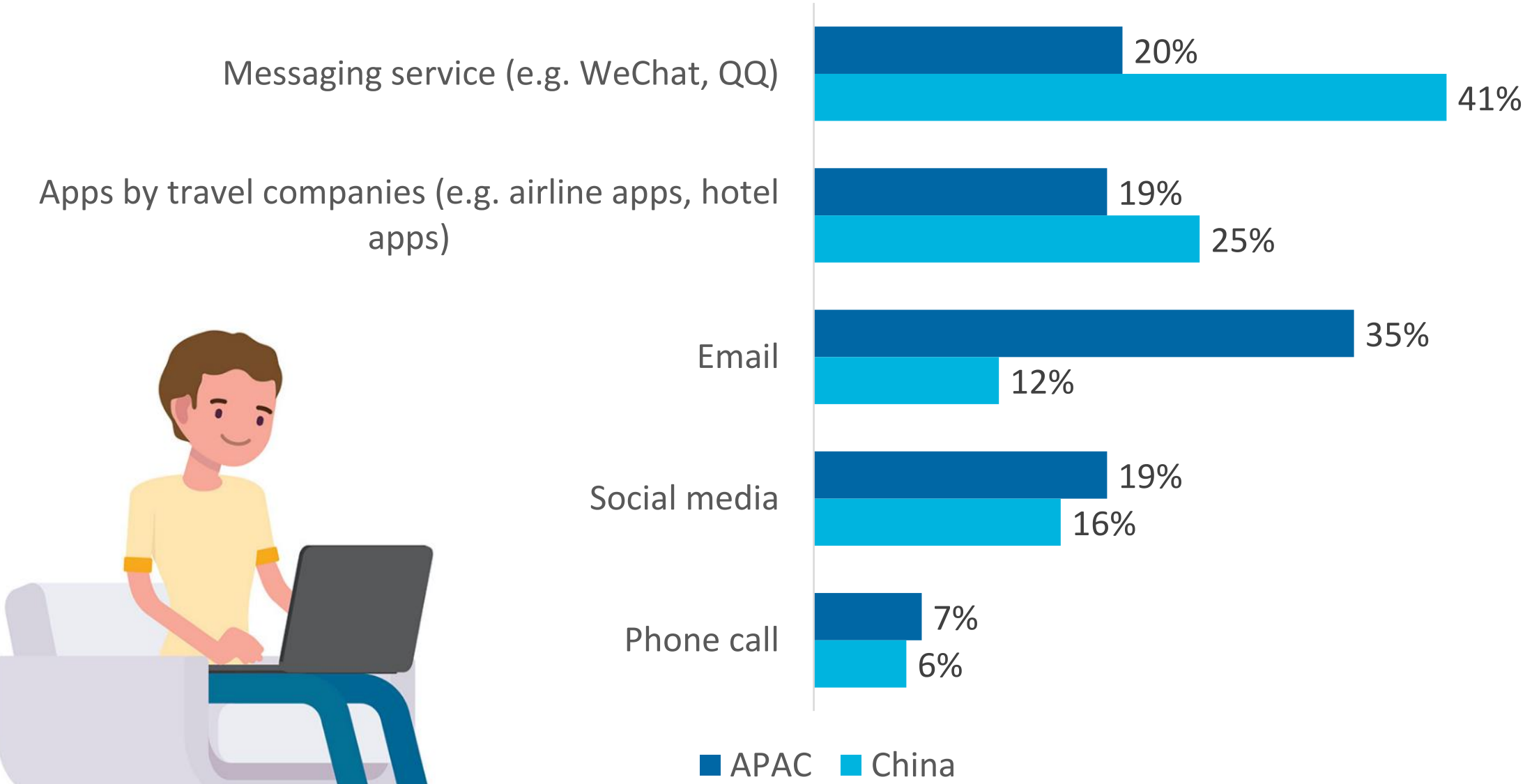


TALK TO ME

Q13. Which of the following do you prefer to use when it comes to receiving updates or recommendations about your trip?

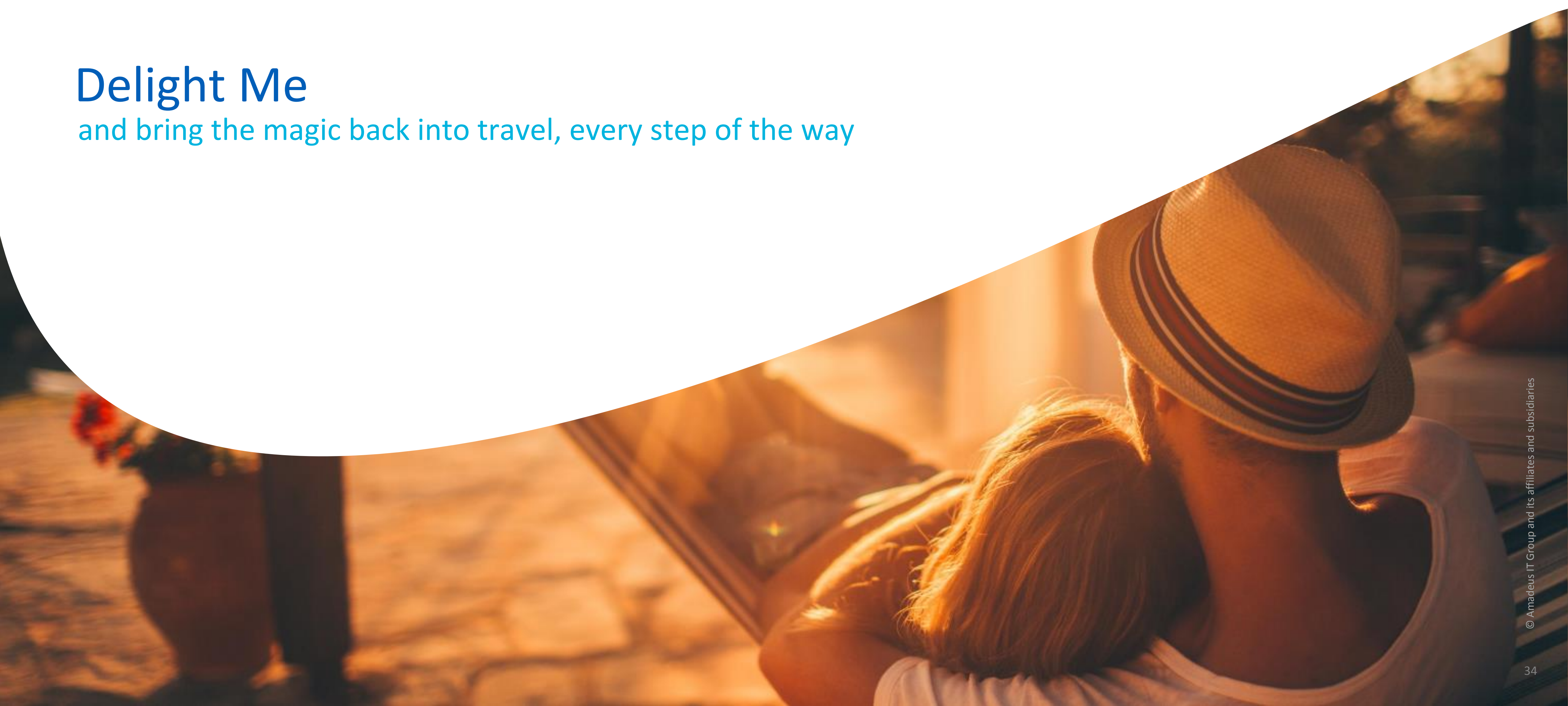
Chinese travellers show a much stronger preference for receiving updates and recommendations about their trip through messaging services like WeChat (41%) compared to travellers in all other markets – only 20% of APAC travellers in total selected that option. On the other hand, Chinese travellers are much less inclined to want these updates through email (12%) which is the most preferred option amongst APAC travellers. Interestingly, infrequent travellers prefer receiving recommendations and updates via messaging service (44%), but frequent travellers prefer receiving them through travel company apps (37%).

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



Delight Me

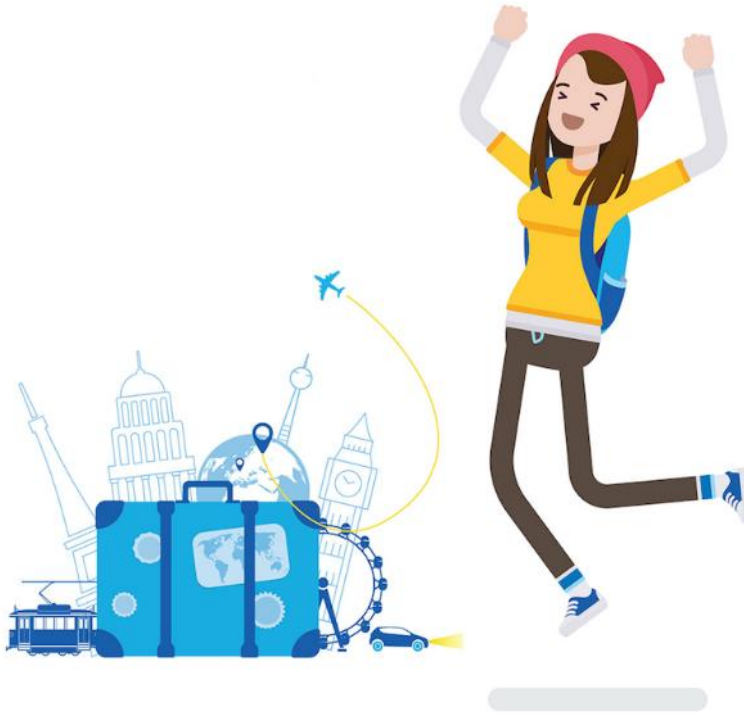
and bring the magic back into travel, every step of the way



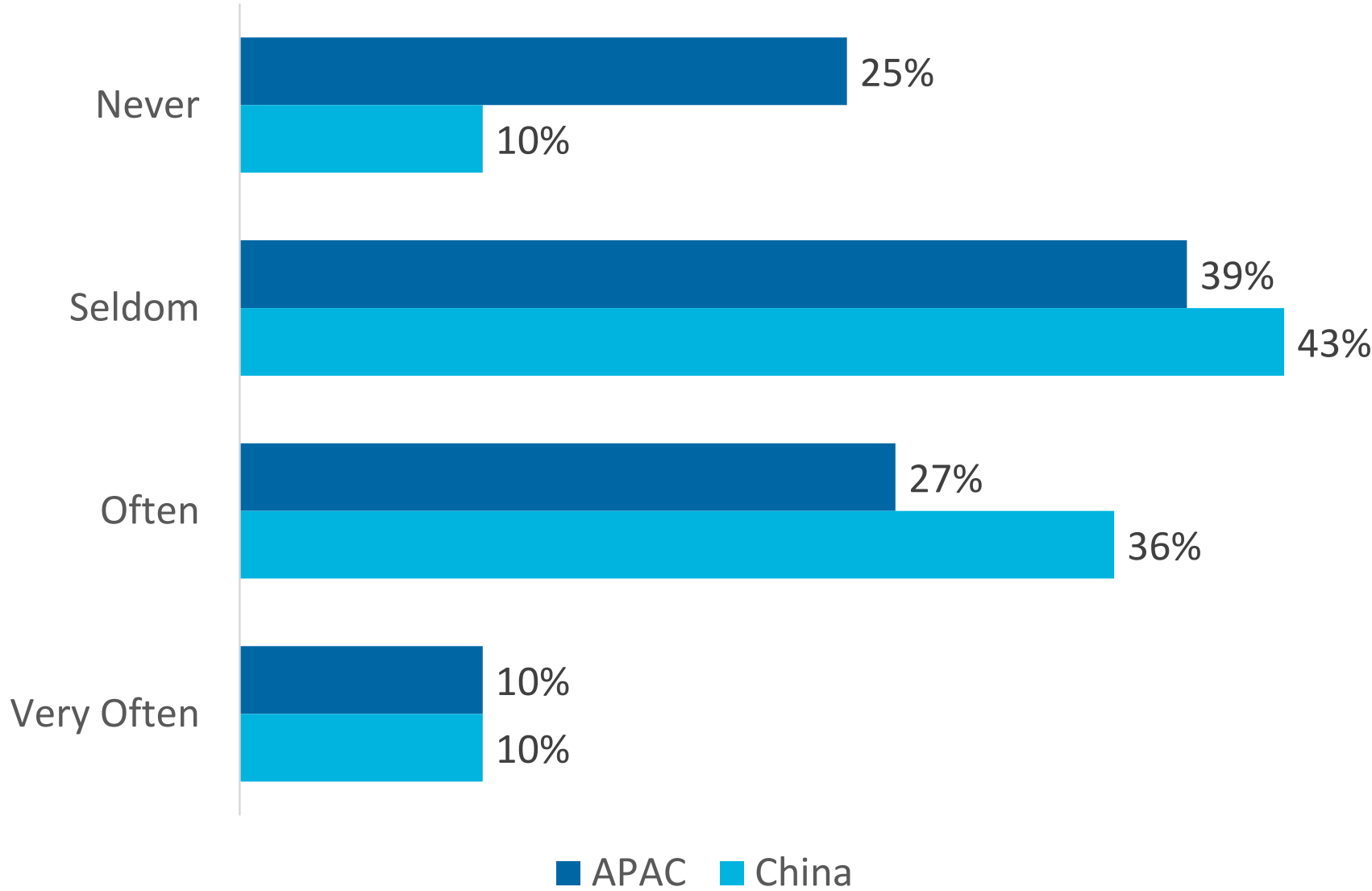
DELIGHT ME

Q14. How often do you use the following apps or services?

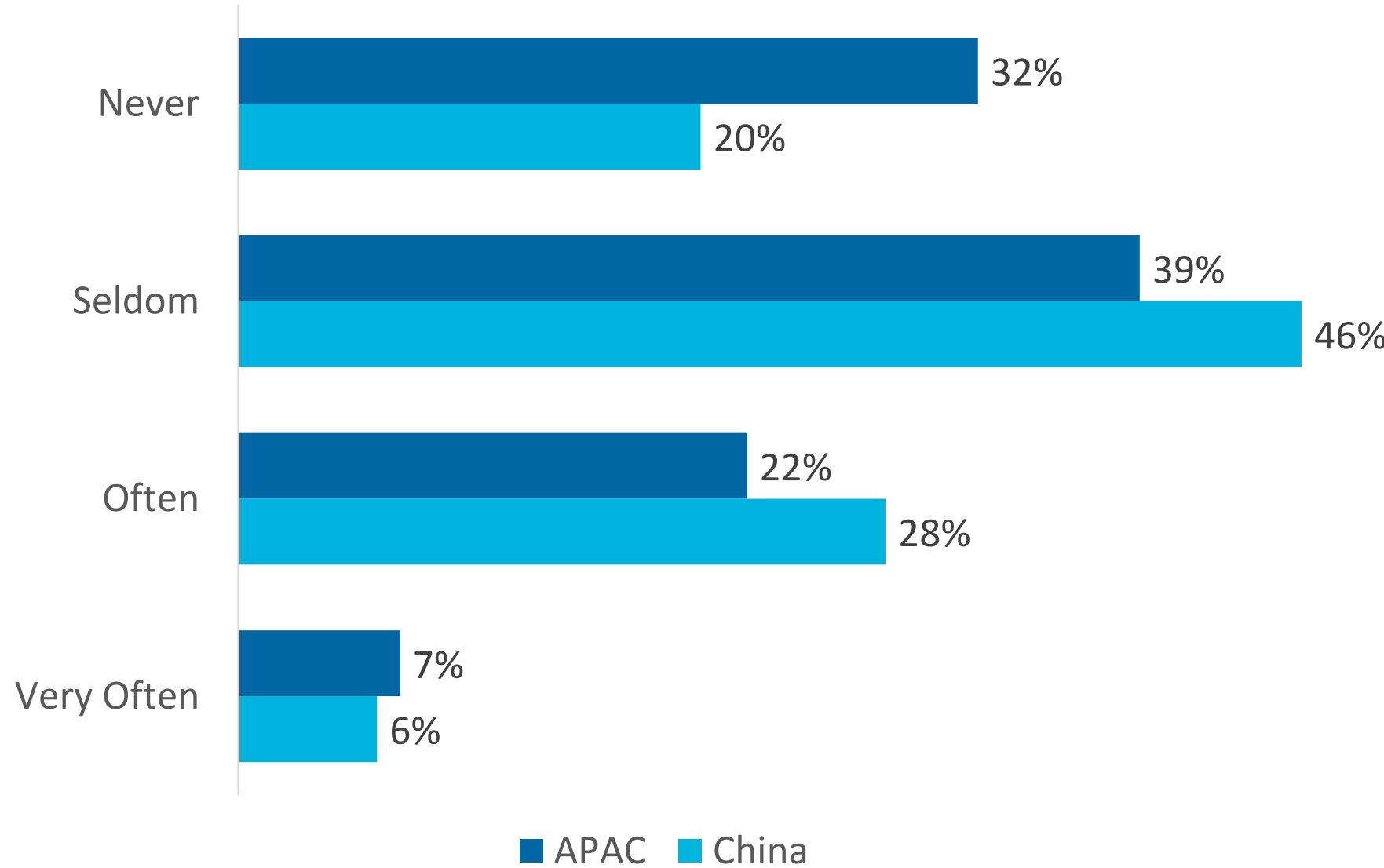
Compared to APAC travellers in general, Chinese travellers show higher usage of sharing economy services and apps. Fewer Chinese travellers (10%) say they have never used transport apps, or accommodation apps (20%) compared to other APAC travellers.



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



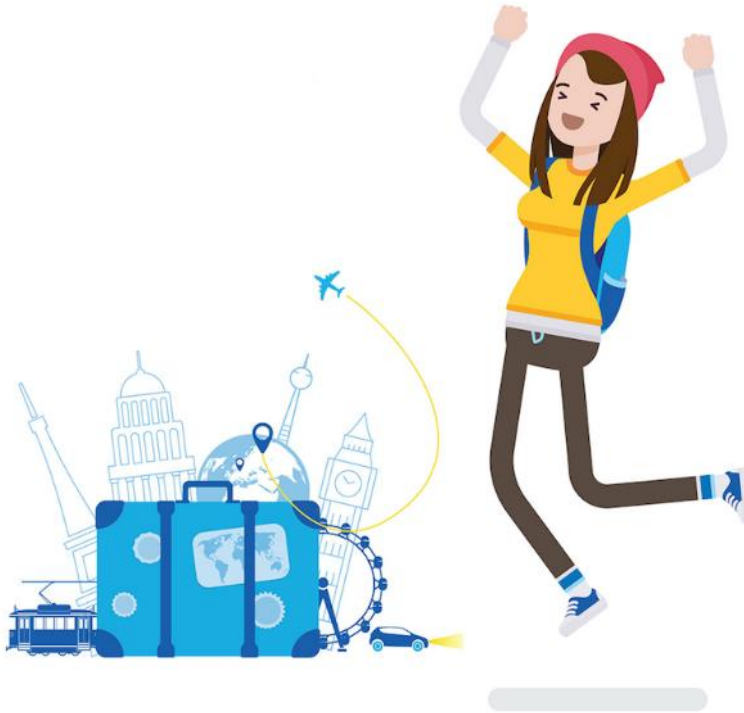
Apps or services for stays during a trip e.g. Airbnb, Couchsurfing, etc.



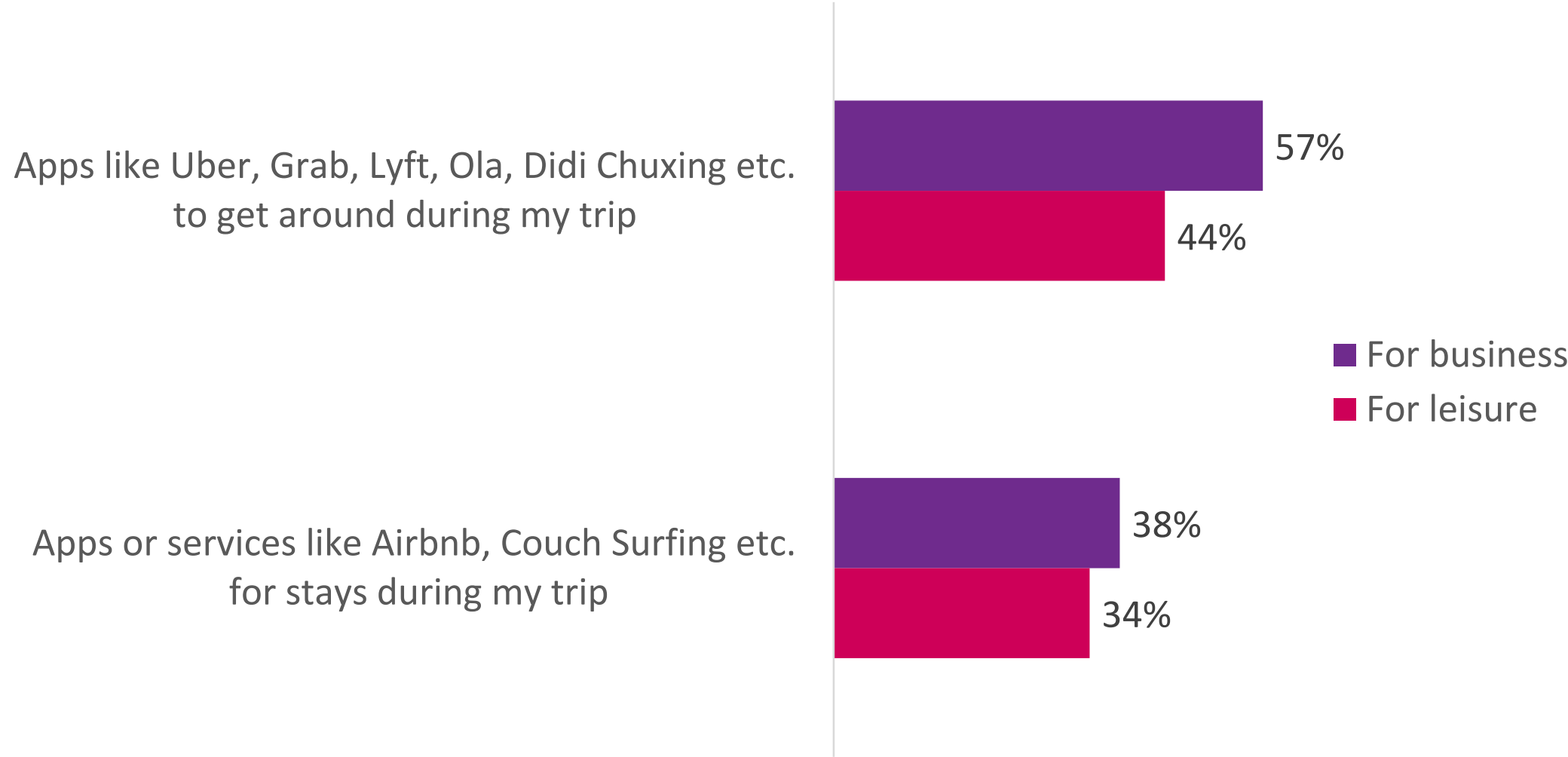
DELIGHT ME

(Continued) Q14. How often do you use the following apps or services?

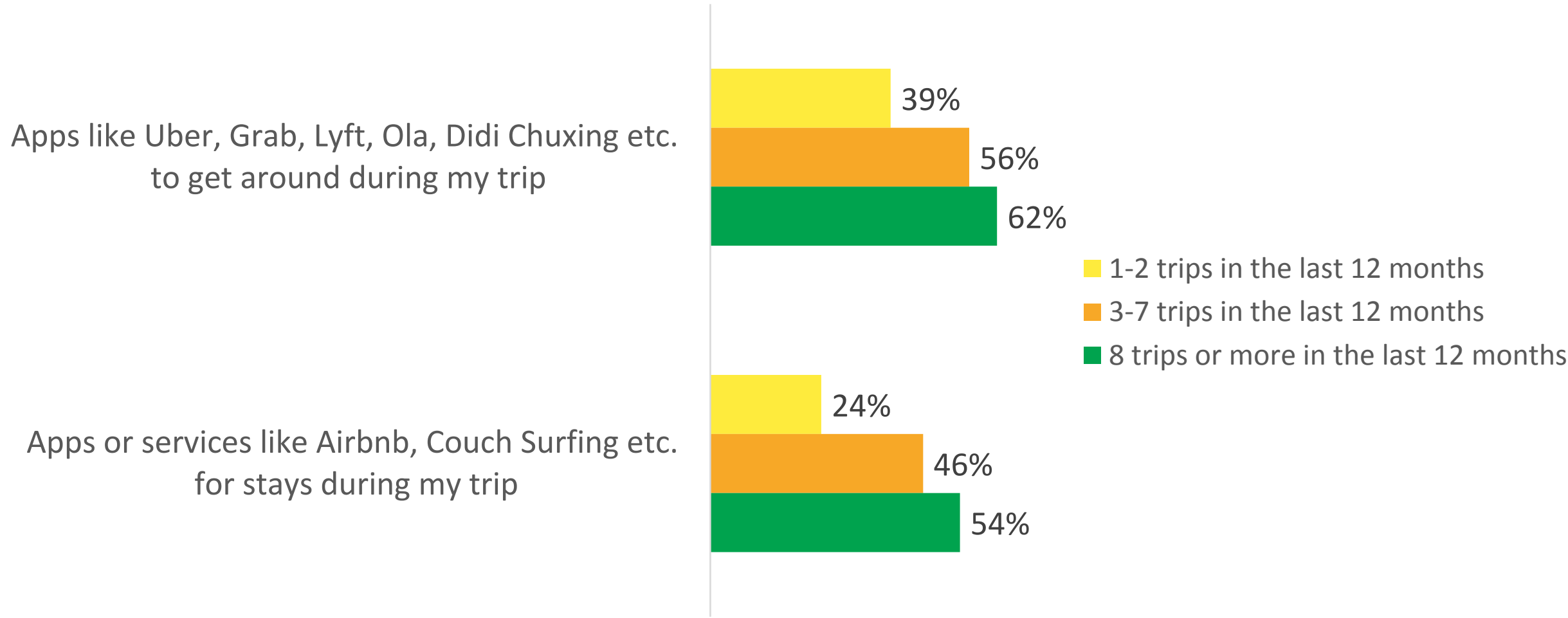
Chinese business travellers tend to use sharing economy apps more often than leisure travellers, and frequent travellers are twice more likely to often use sharing economy services for stays (54%) compared to infrequent travellers (24%).



By travel type



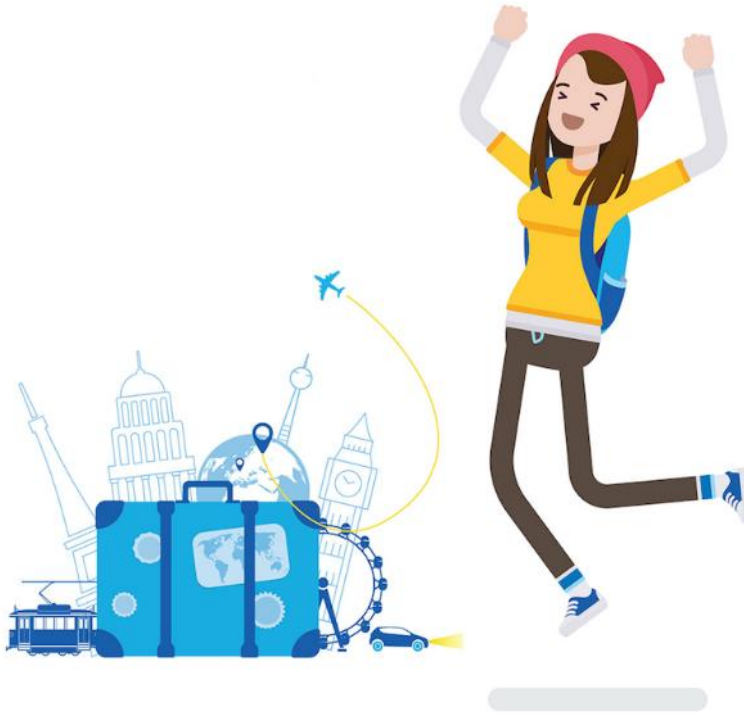
By travel frequency



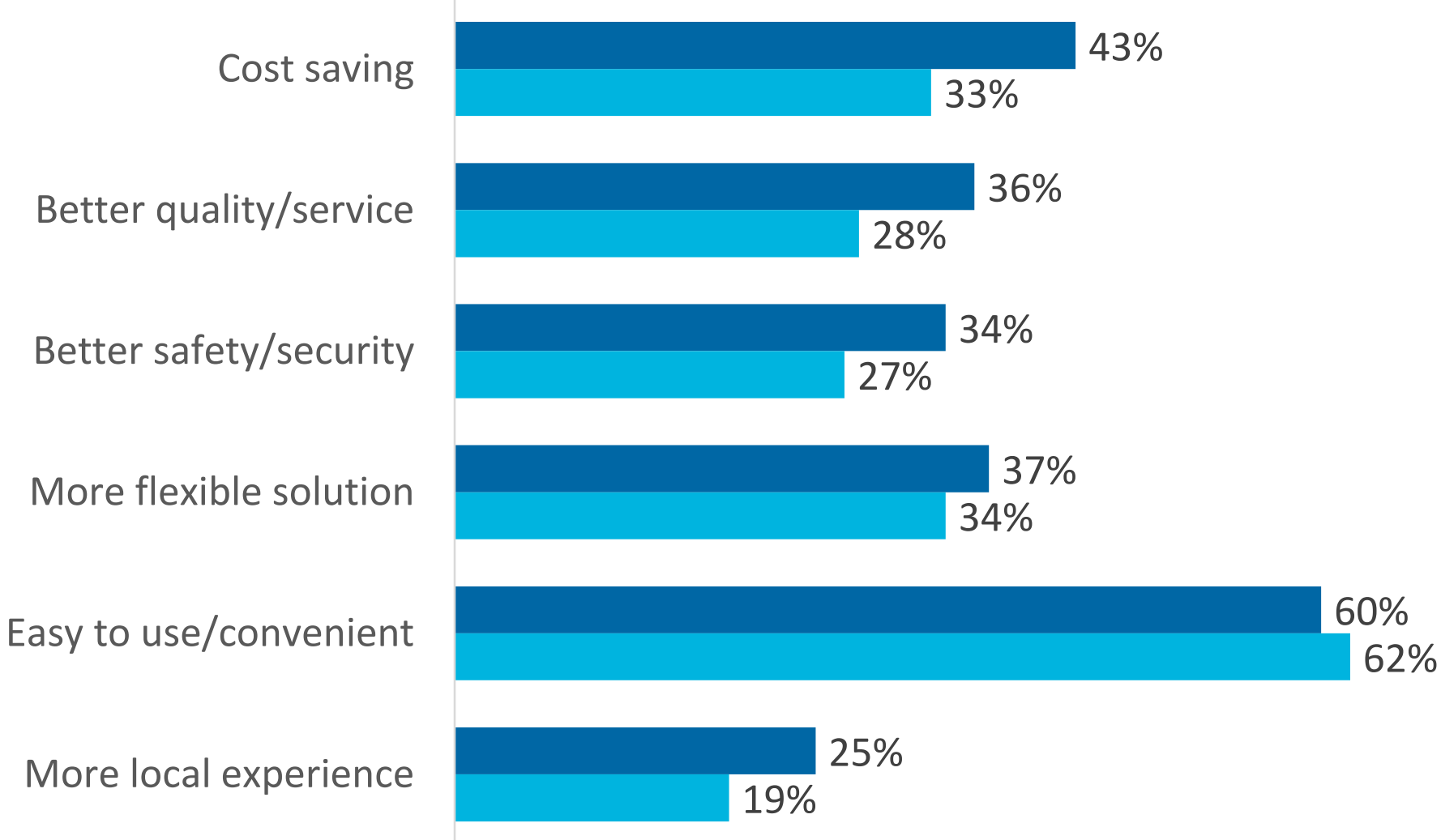
DELIGHT ME

Q15. Why did you choose to use these sharing economy services and apps? *Select all that apply*

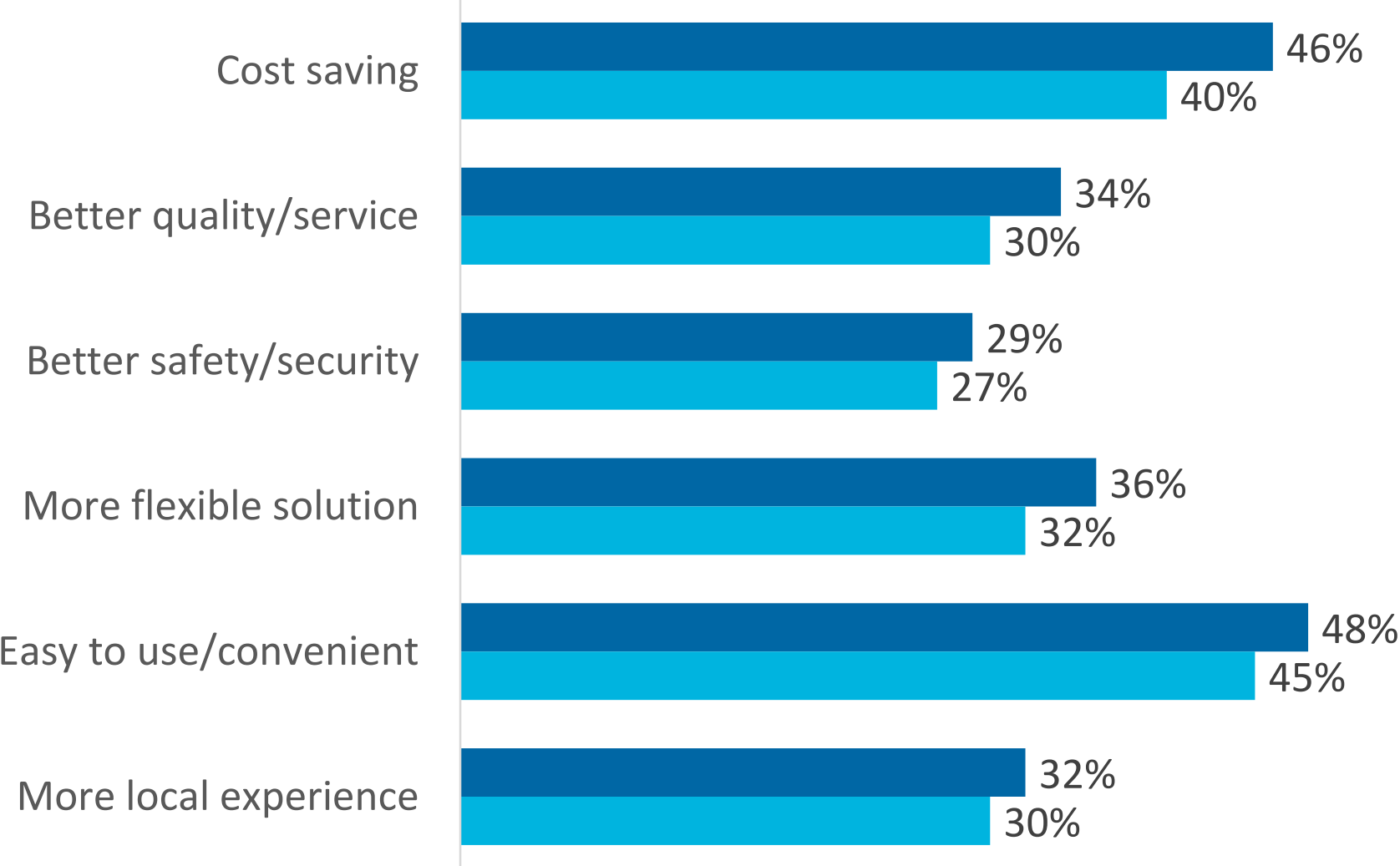
Chinese travellers cite convenience and easy of use as the top reasons for using sharing economy transport and accommodation services.



Reasons for using sharing economy apps to get around during trips



Reasons for using sharing economy services/apps for stays during trips



■ APAC ■ China

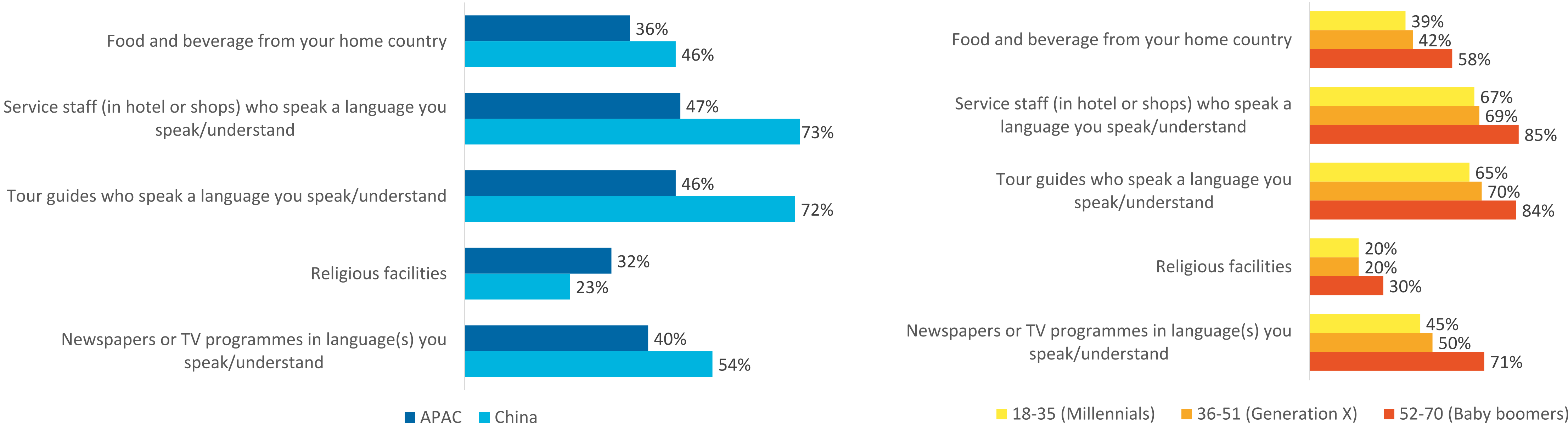
DELIGHT ME

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

Chinese travellers are more likely than APAC travellers in general to seek local offerings at the destination. They are more likely to think its important to find food and beverages from their home country, service staff that speak a language they understand, tour guides that speak a language they understand, and newspapers or TV programmes in a language they understand. These options are particularly important for the Baby Boomers.



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

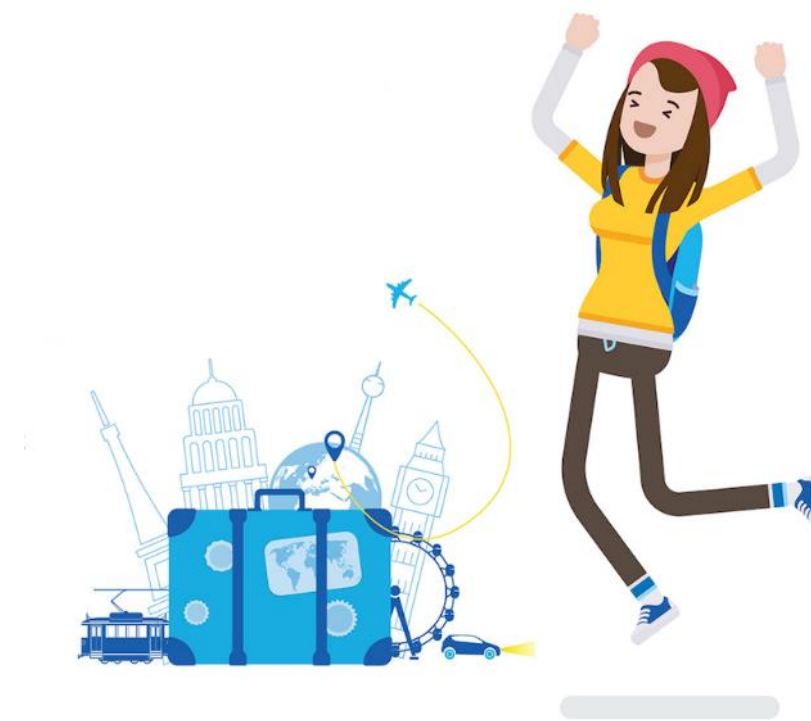


* Percentage of respondents choosing 'Somewhat important' and 'Very important' for each option is presented.

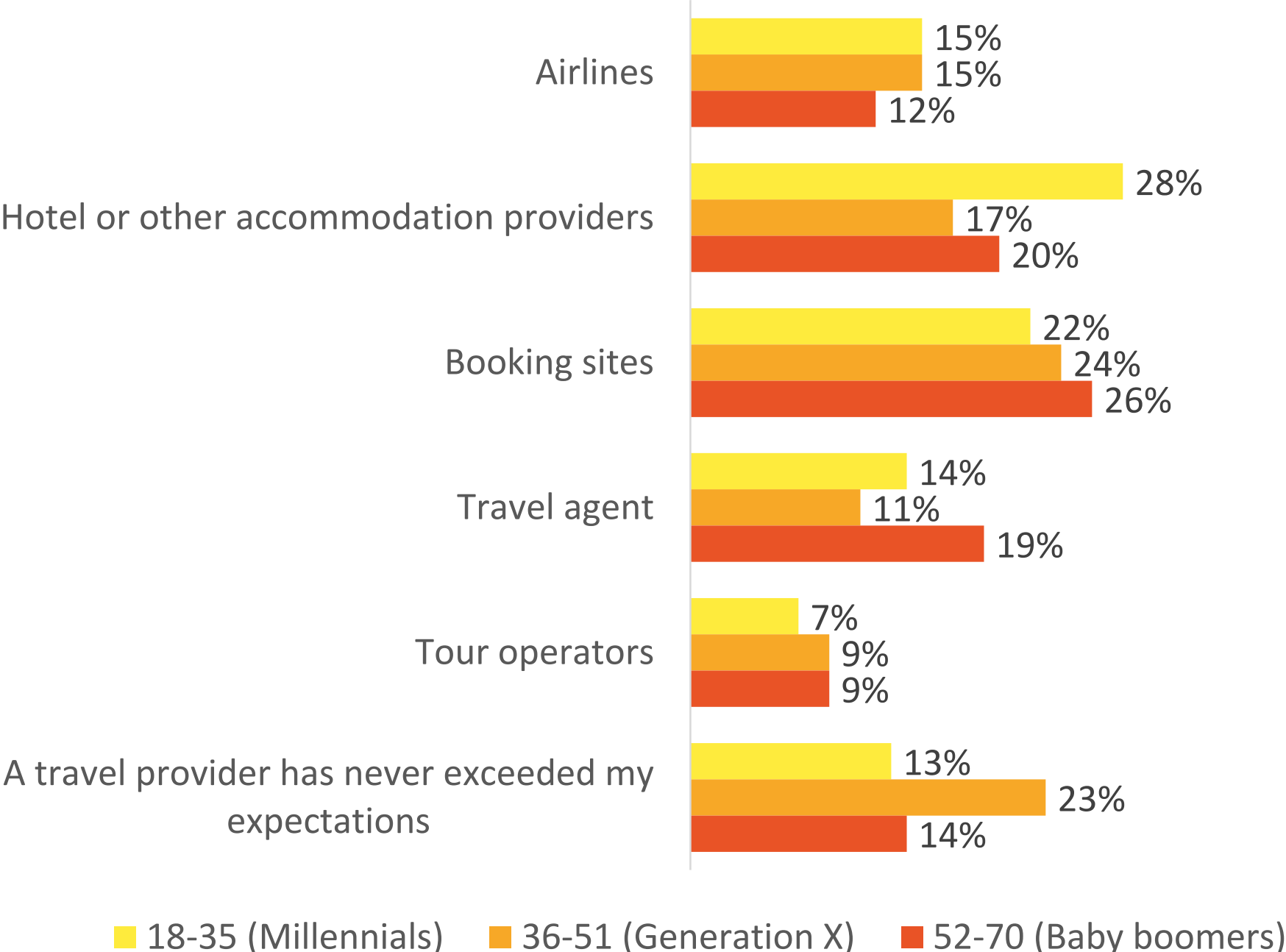
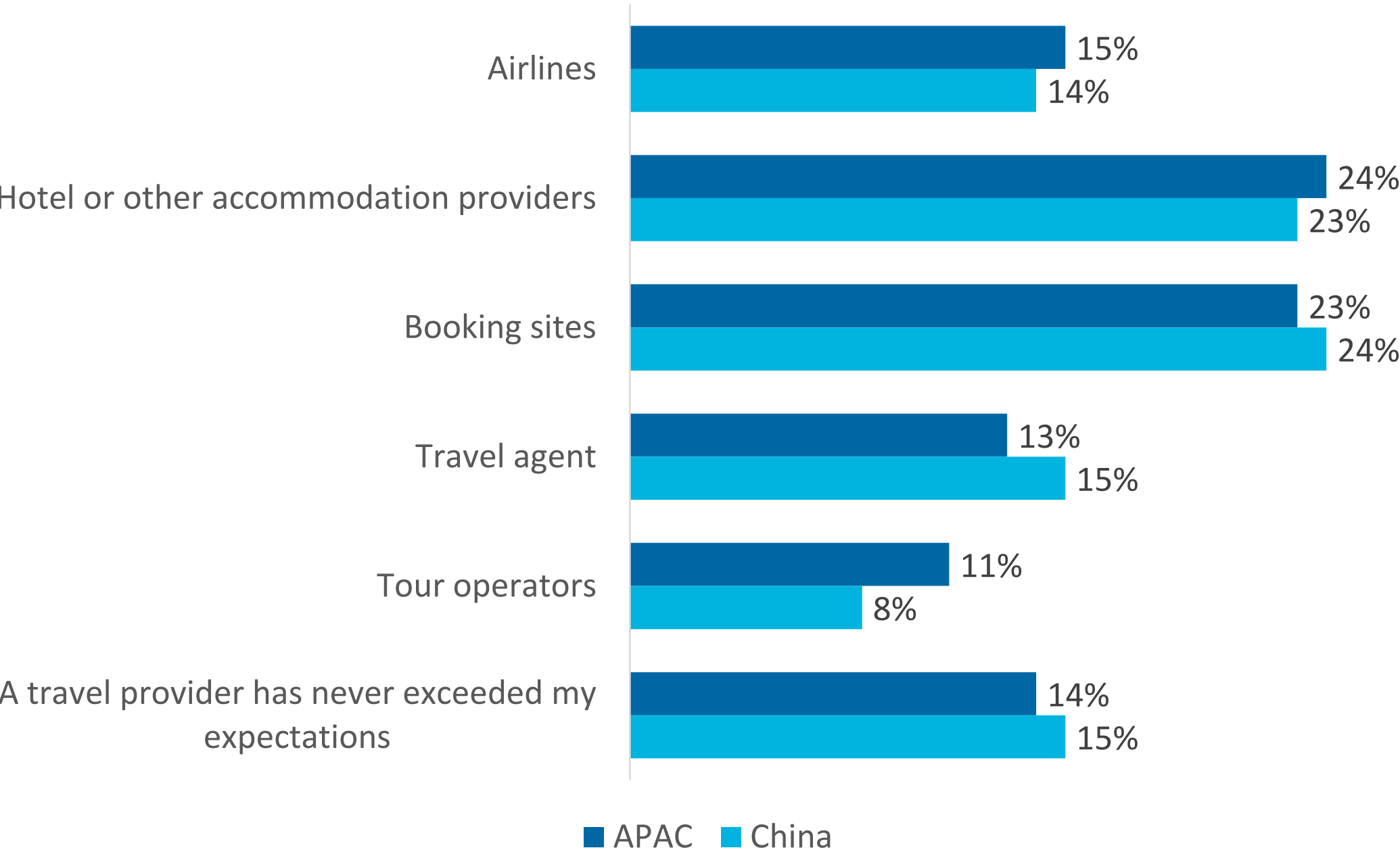
DELIGHT ME

Q17. Based on your past travel experiences, which of the following travel service providers have impressed you and exceeded your expectations the most?

15% of Chinese travellers say that a travel provider has never exceeded their expectations. Gen X Chinese travellers seem to be the hardest to please, with 23% of them saying they have never had a travel provider exceed their expectations, compared to only 13% of Millennials and 14% of Baby boomers who state the same.



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



Care for Me
and keep me safe and secure

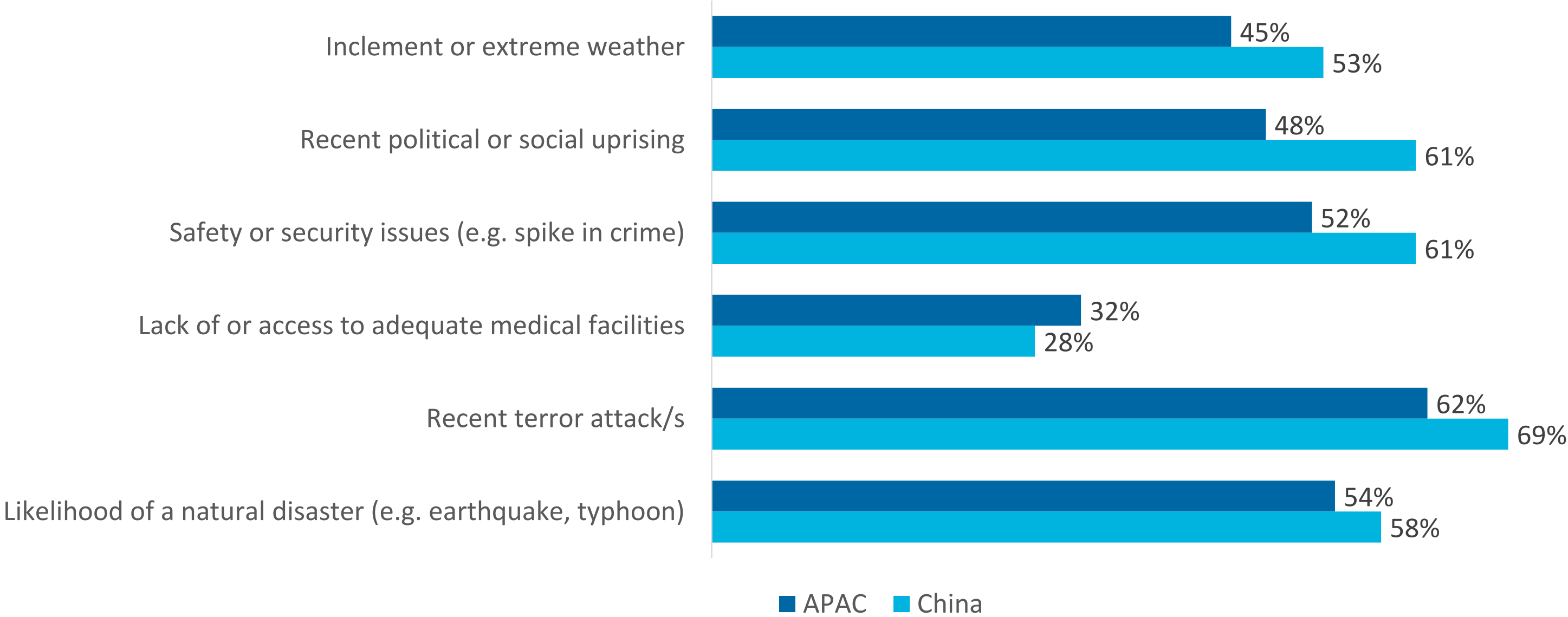


CARE FOR ME

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?

Chinese travellers tend to be more sensitive to adverse events. In general they are more likely than the average APAC traveller to avoid a destination due to recent or potential adverse events. They are particularly sensitive to recent terror attacks and recent political or social uprisings.

% of travellers who would avoid a destination due to the following



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

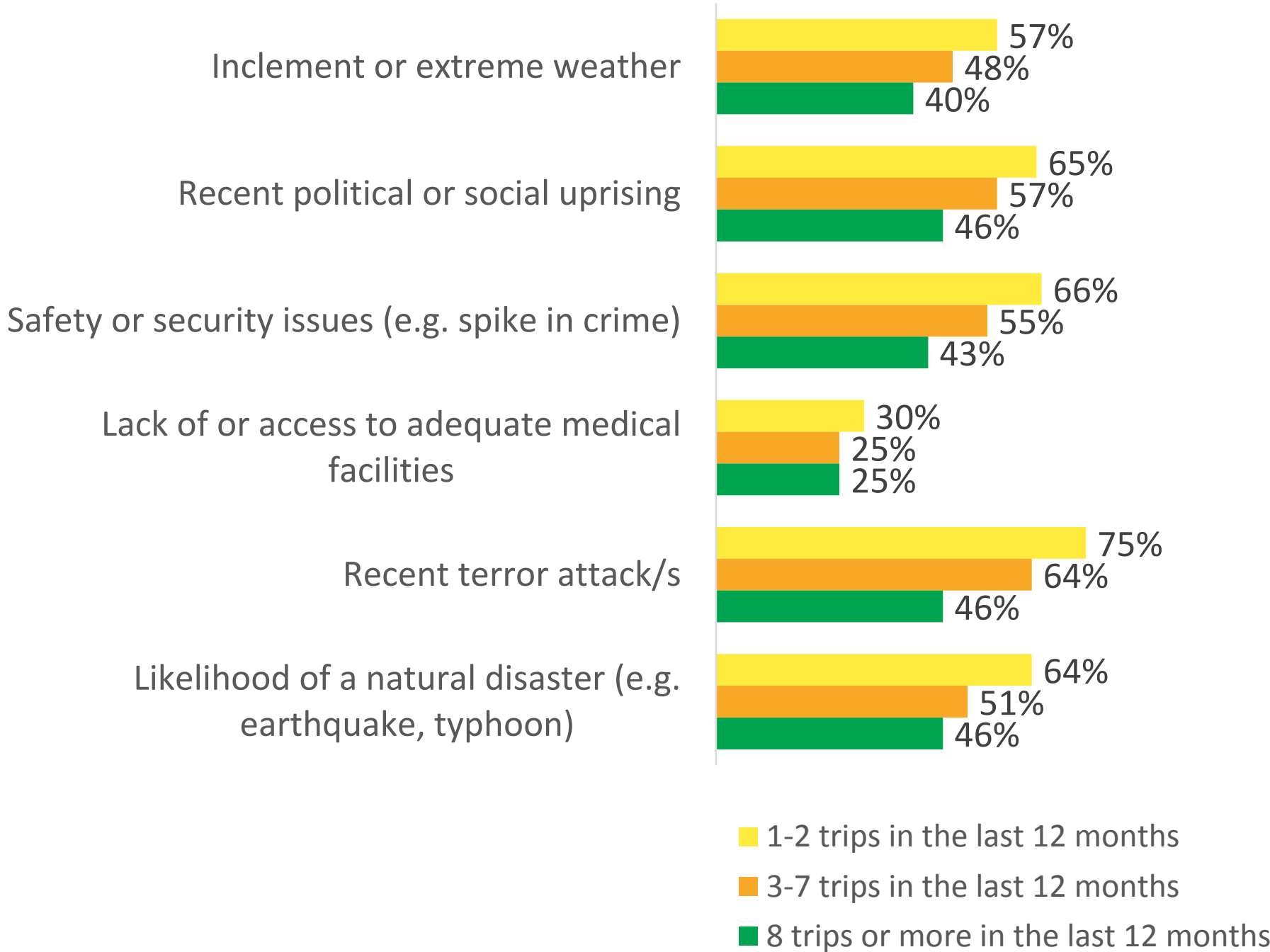
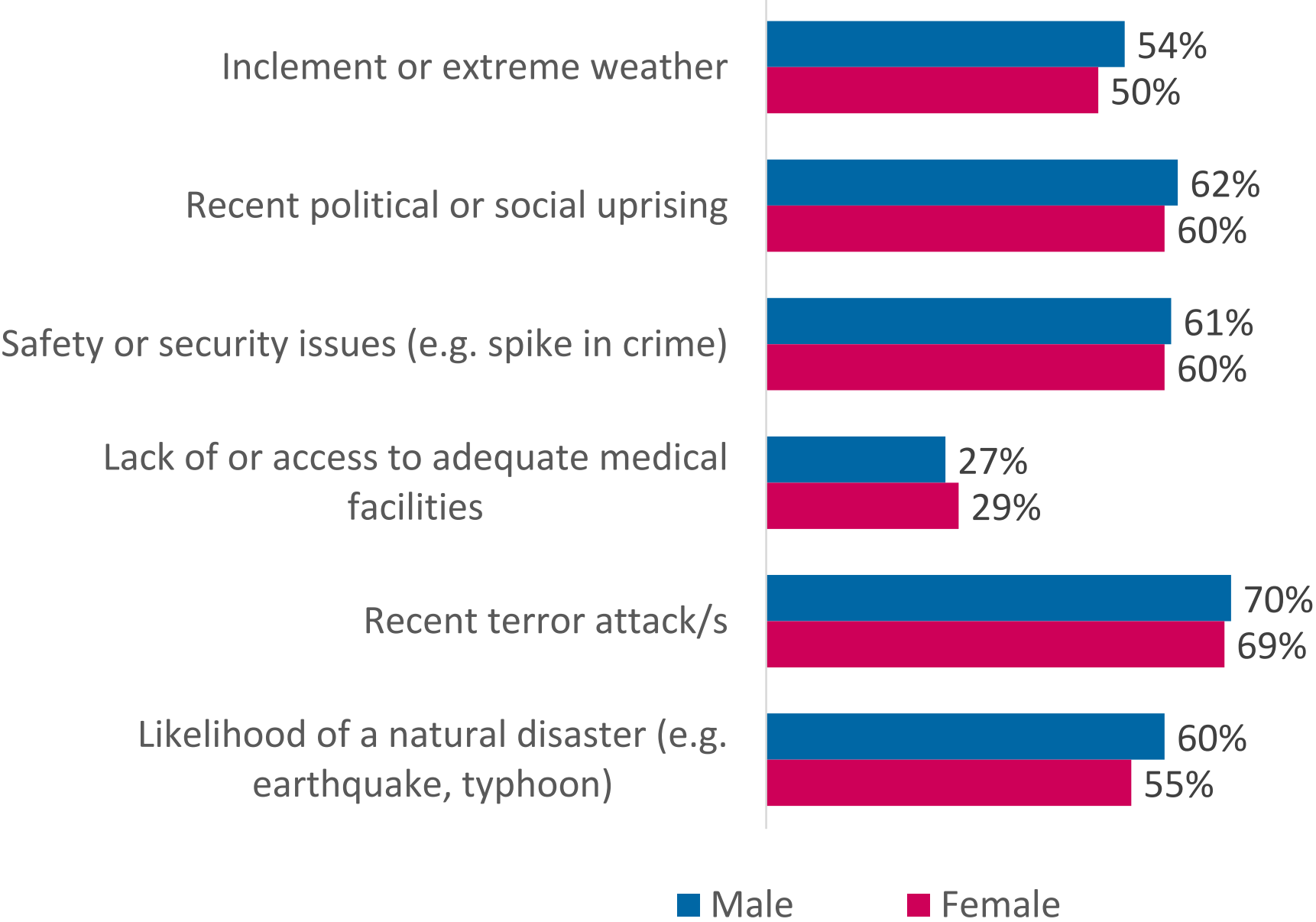


CARE FOR ME

(Continued) 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?

Chinese female travellers are slightly less likely to be negatively affected by any of the adverse events listed except for lack of access to adequate medical facilities. Also, the more frequently a traveller travels, the less likely he or she is to avoid a destination to due an adverse event.

% of travellers who would avoid a destination due to the following



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

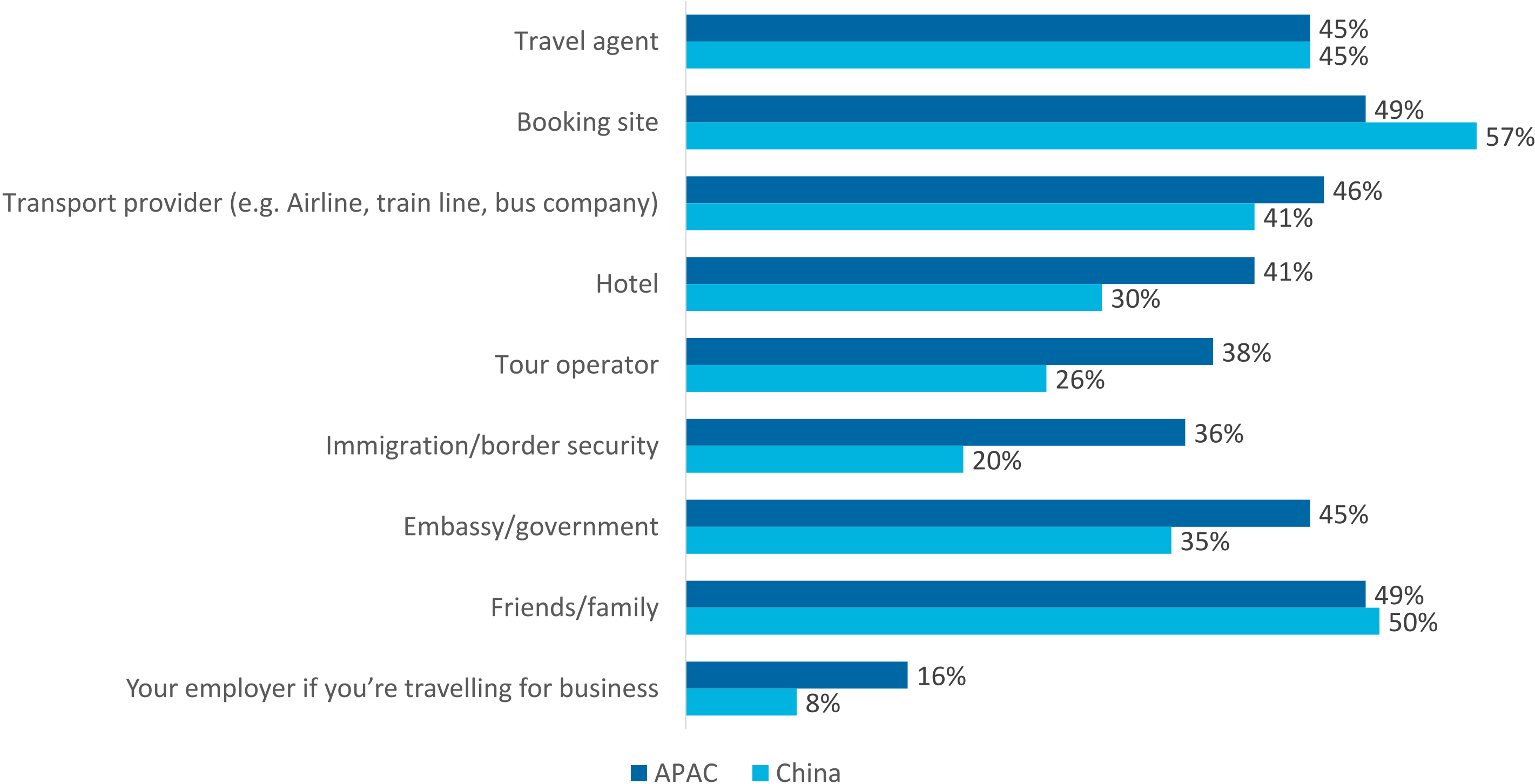


CARE FOR ME

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

Chinese travellers rely most heavily on booking sites to give them safety and security updates. More so than APAC travellers do. On the other hand they seem to be less dependent on official sources like their embassy/ government or immigration/ border security.

Preferred sources of safety or security updates



Thank you!

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