

Booking.com

TRAVEL CONFIDENCE INDEX

REVEALING THE PROFILE OF THE APAC
TRAVELLER

2022



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PROJECT BACKGROUND

Travel Confidence, tracking the profile of the APAC traveler

The start of 2020 saw the travel industry rocked by the sudden onset of the COVID-19 pandemic. For the first time, global borders were closed, markets went into various forms of lockdowns and travel came to a standstill.

Two years on, the travel industry is seeing the light at the end of the tunnel thanks to the rollout of widespread vaccination programmes and the gradual restart of travel.

As travellers resume feeding their wanderlust and the travel industry gears up for recovery, the question on our minds was “Who is the new APAC traveler?”.

Milieu Insights was commissioned by Booking.com to run a survey across 11 markets in the APAC region, with the objective of diving into the attitudes and motivations that drive travel decisions in an endemic COVID-19 world while understanding how far travellers are willing to go in the name of sustainability. The survey was constructed to touch on the following topics:

1. Restart of Travel
2. Behaviour once Travel Restarts
3. Role of Online Travel Companies
4. Travelling Sustainably
5. Market-Specific Questions



Survey Coverage

The survey covered 11 markets across the Asia Pacific region:

- Australia
- China
- Hong Kong
- India
- Japan
- Korea
- New Zealand
- Singapore
- Taiwan
- Thailand
- Vietnam

The survey was open to general population aged 16 and above, and eventually 1,000 respondents in each market were surveyed in the period of April 19 - May 17, 2022, and were asked about their views towards travelling in an endemic COVID-19 world.





TRAVEL CONFIDENCE

Overview of market rankings by travel confidence index and sustainability index

VISUALISING TRAVEL CONFIDENCE AND SUSTAINABILITY ACROSS APAC

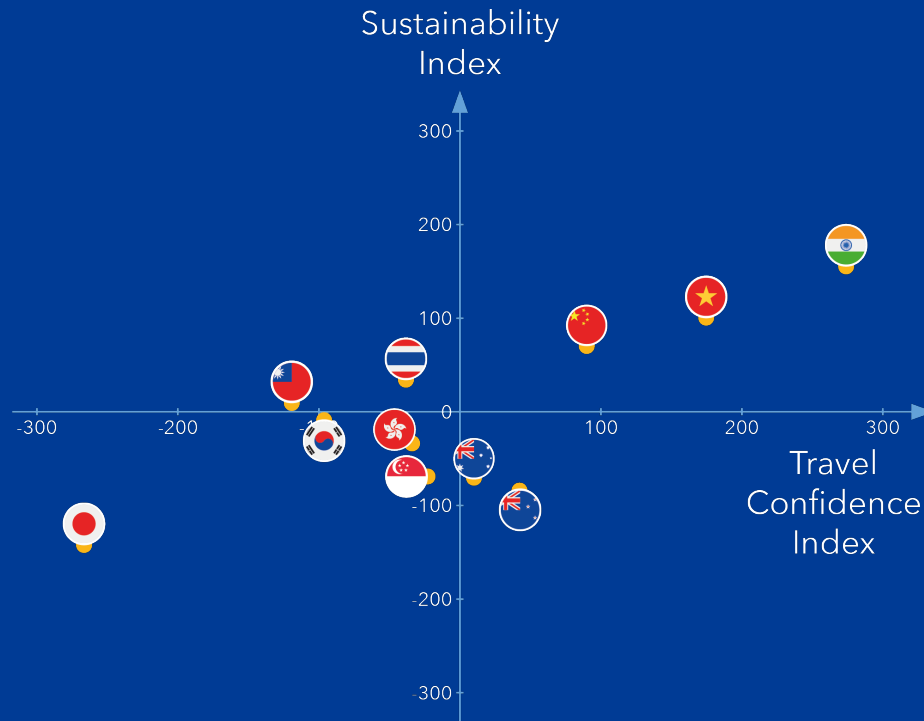
The Booking.com Travel Confidence Index showcases two key factors.

1. How confidence across the region as a whole varies from market to market
2. How inclined toward sustainability each market is

By pitting the two indexes against each other, we were also able to visualize the diversity in Travel Confidence and Sustainability attitudes across the region.

The index is set upon a 300 by 300 score which was developed based on the total number of survey questions and final market scores yielded. Questions considered were those either tested Confidence or attitudes toward Sustainability.

Markets that scored in the positive end of the spectrum scored higher than average while those on the negative end of the spectrum scored lower than average.





MARKET- HOPPING

A deep-dive on understanding each market

Rank **1st**

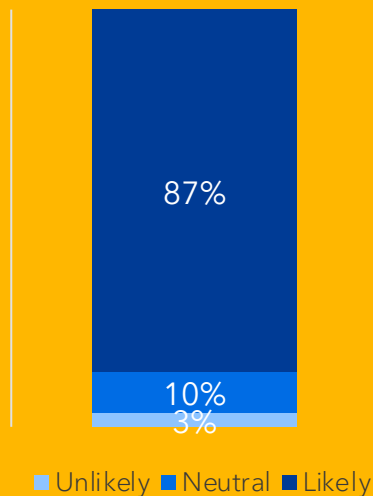
Travel Confidence in India is consistently high across the board with travelers looking likely to travel in the next 12 months despite travel disruptions

	INDIA	TOTAL 11M
Likely to travel in the next 12 months	86% ▲	76%
Consider leisure travel important during COVID-19	78% ▲	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	11% ▼	17%
Accepting of anticipated travel disruptions	70% ▲	47%
Comfortable with the reopening of borders	87% ▲	53%
Willing to share their personal information for safety	88% ▲	65%
Willing to share their personal information for greater personalization	80% ▲	57%
Have confidence with their market receiving international travelers	84% ▲	51%

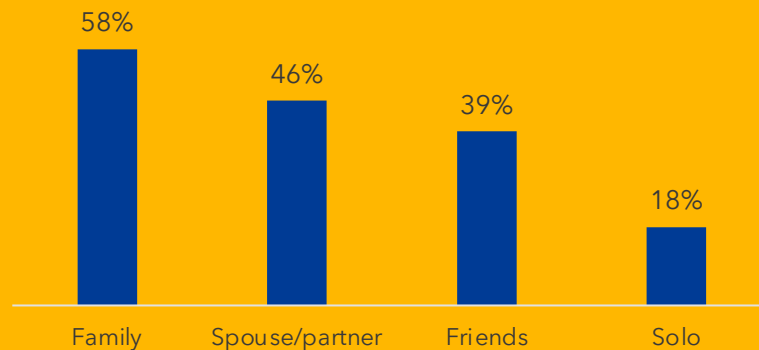


Domestic travel is set to fuel Indian travel with most travelers turning to family for travel company

Likely to continue traveling domestically once international borders reopen

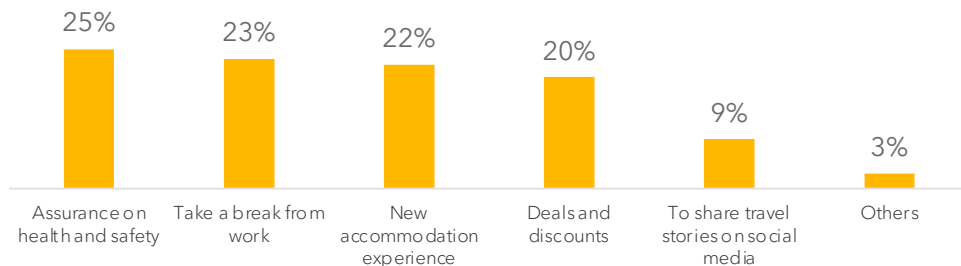


Preferred travel companions in 2022

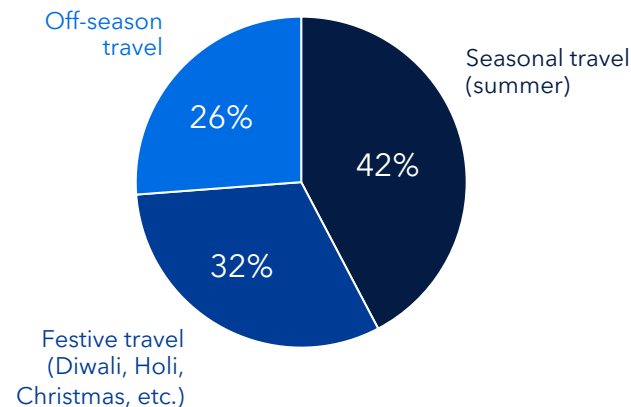


An assurance toward health and safety has emerged the biggest motivator to travel, followed very closely by work break getaways, and new accommodations with most Indian travelers planning to travel over Summer.

Biggest motivators to travel in 2022



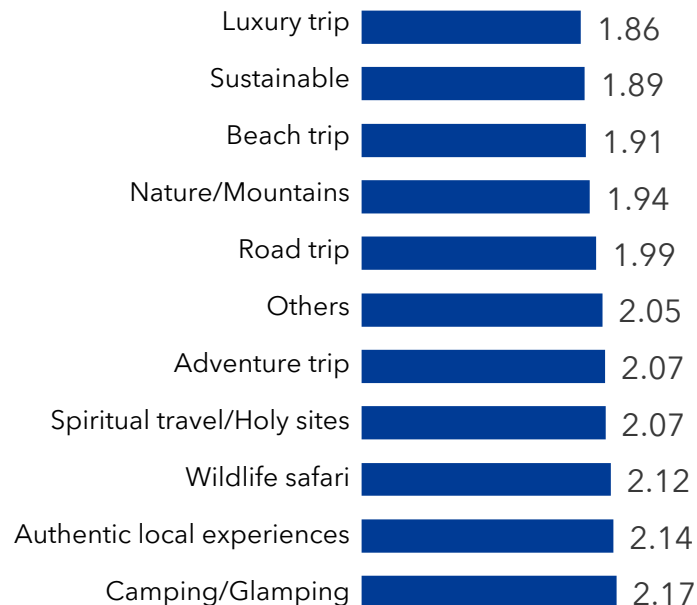
Preferred time/season for 2022 travel



Indian travelers are keen to experience sustainable luxury when travelling domestically.

Interestingly, they showcase the least preference for the outdoors.

**Trip Type Preferred for Domestic Travel
(Weighted Rank)**



Rank **2nd**

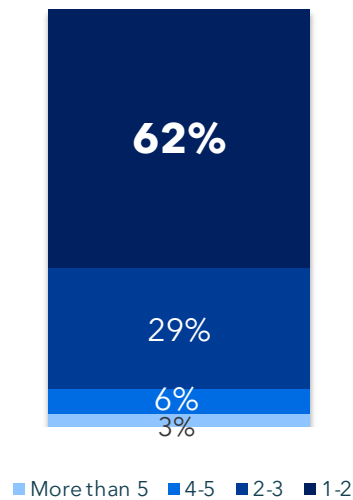
Like India, Travel Confidence in Vietnam has emerged consistently high with travelers likely to travel in the next 12 months and are confident they are ready to welcome international travelers

	VIETNAM	TOTAL 11M
Likely to travel in the next 12 months	85% ▲	76%
Consider leisure travel important during COVID-19	68% ▲	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	16% ▼	17%
Accepting of anticipated travel disruptions	49% ▲	47%
Comfortable with the reopening of borders	82% ▲	53%
Willing to share their personal information for safety	78% ▲	65%
Willing to share their personal information for greater personalization	67% ▲	57%
Have confidence with their market receiving international travelers	75% ▲	51%

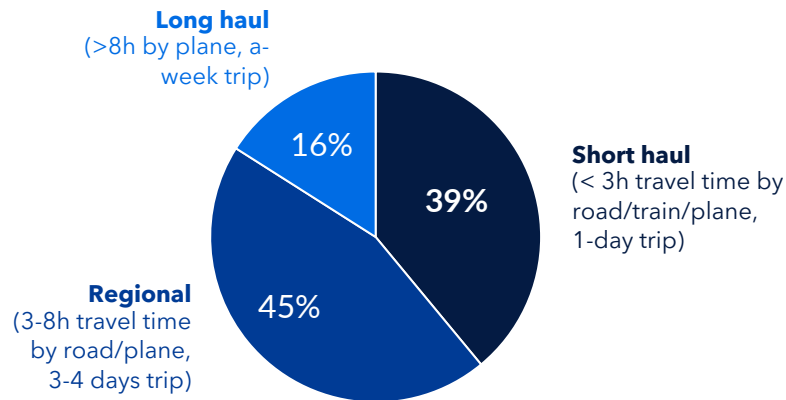


Over half of Vietnamese travelers are planning to travel within the region at least once in the next 12 months

Number of trips planned in the next 12 Months

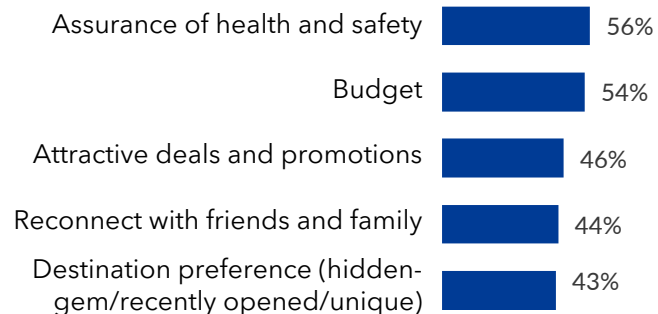


Prioritized length of trip for first post-pandemic holiday



A potential side-effect of the pandemic, the assurance of health and safety, alongside budget have emerged the top considerations for restarting travel with most Vietnamese travelers looking toward authentic local experiences

Considerations for first post-pandemic holiday



Trip types preferred when traveling domestically



When it comes to sustainability, there is a focus on locally-sourced food alongside experiencing local tours and activities

Important sustainable practices in upcoming travel



Rank **3rd**

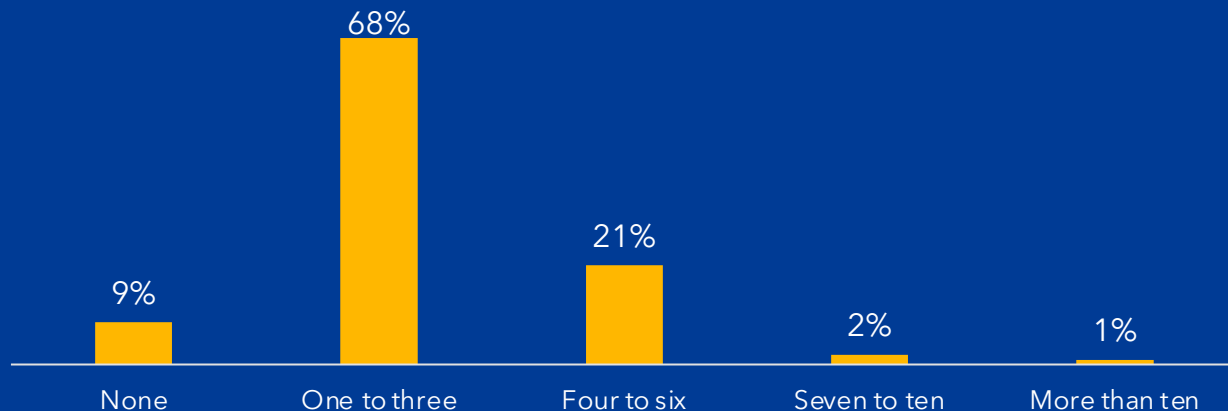
Confidence amongst Chinese travelers is high. However when asked about travel disruptions, slightly less than half would accept this

	CHINA	TOTAL 11M
Likely to travel in the next 12 months	89% ▲	76%
Consider leisure travel important during COVID-19	61% ▲	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	12% ▼	17%
Accepting of anticipated travel disruptions	48% ▲	47%
Comfortable with the reopening of borders	61% ▲	53%
Willing to share their personal information for safety	76% ▲	65%
Willing to share their personal information for greater personalization	70% ▲	57%
Have confidence with their market receiving international travelers	70% ▲	51%



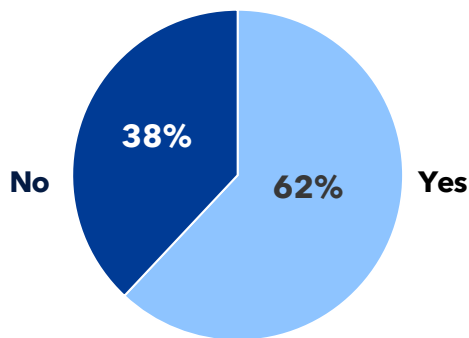
Nearly 3 in 10 travelers plan to take up to three domestic trips in 2022

Number of domestic trips planned in 2022



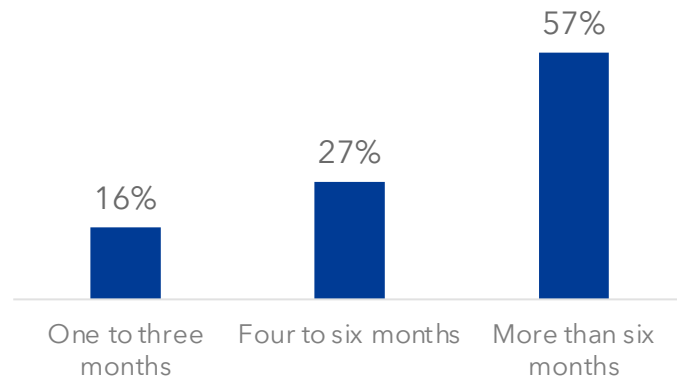
The majority of Chinese travelers plan to head overseas once China's quarantine policy is lifted, while those don't, plan to wait more than half a year before traveling

Overseas travel plans after the lifting of China's Quarantine Policy



Period of time before planning to travel overseas

(Base: among NOT planning n=382)

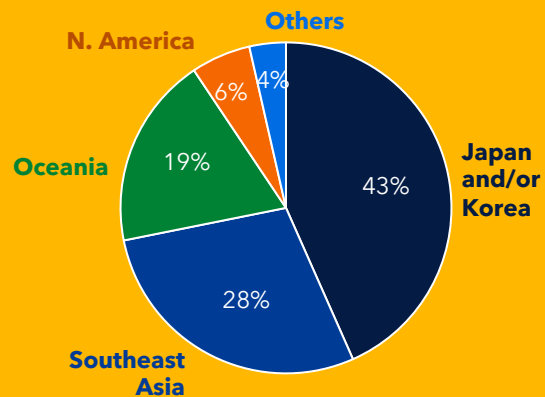


Base: CN Respondents (n=1,000)

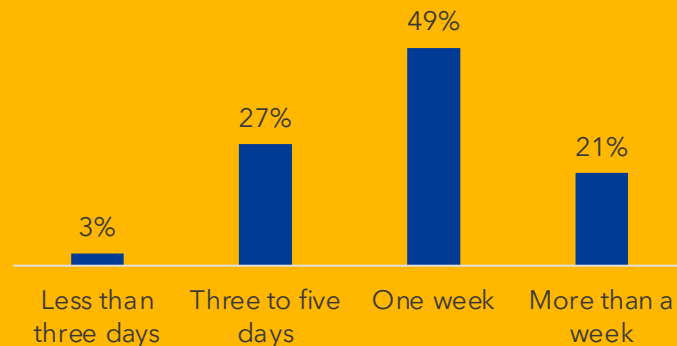
Question: Are you planning to travel overseas immediately once China's current quarantine policy is lifted? | You mentioned that you are NOT planning to travel overseas immediately once China's current quarantine policy is lifted. How long would you plan to wait before you would travel overseas?

When looking beyond China's borders, the majority of travelers were looking at neighboring Japan and Korea, planning to spend up to a week away

First destination travelers plan to visit



Planned length of trip



Rank **4th**

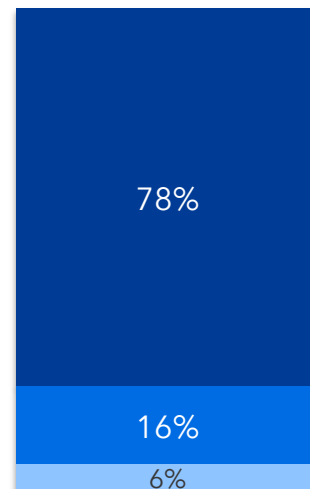
8 in 10 New Zealand travelers are set to travel in the next 12 months but are less willing to share their personal information for both safety and personalization

	NEW ZEALAND	TOTAL 11M
Likely to travel in the next 12 months	79% ▲	76%
Consider leisure travel important during COVID-19	49% ▲	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	27% ▼	17%
Accepting of anticipated travel disruptions	41% ▲	47%
Comfortable with the reopening of borders	61% ▲	53%
Willing to share their personal information for safety	58% ▼	65%
Willing to share their personal information for greater personalization	47% ▼	57%
Have confidence with their market receiving international travelers	58% ▲	51%



Even with the resumption of international travel, a large majority of New Zealand travelers are likely to continue with domestic travel

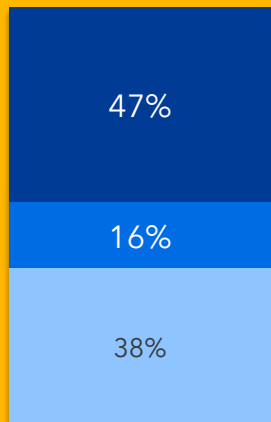
Likelihood of continuing to travel domestically even with the resumption of international travel



■ Unlikely ■ Neutral ■ Likely

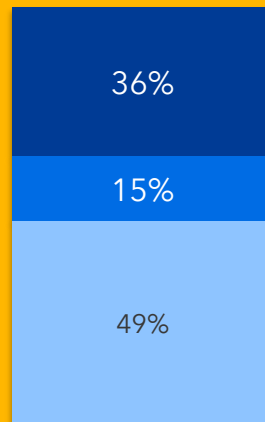
Despite this, nearly half are likely to travel internationally in the next 6 months with the majority of travelers planning to travel within the APAC region

Likelihood of international travel in the next 6 months



■ Unlikely ■ Neutral ■ Likely

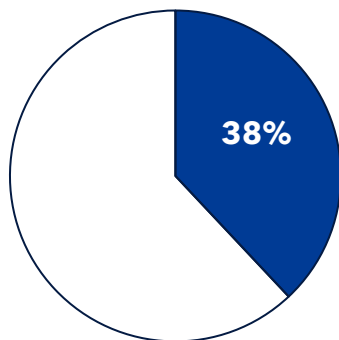
Likelihood of travelling beyond APAC for their first trip



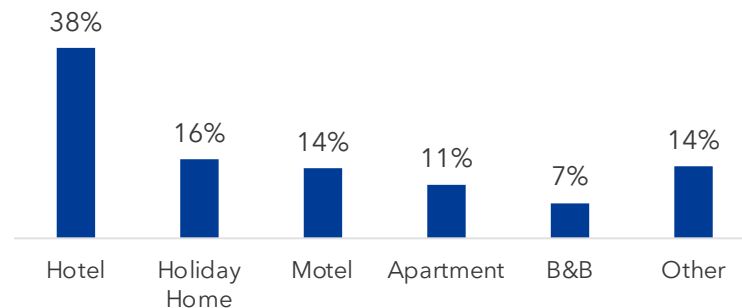
■ Unlikely ■ Neutral ■ Likely

The pandemic has had some impact on the type of accommodation that travelers prefer with hotels emerging most popular, potentially due to a desire for more transparency around safety

Accommodation preferences have been changed by the pandemic



Preferred accommodation for next trip



Rank **5th**

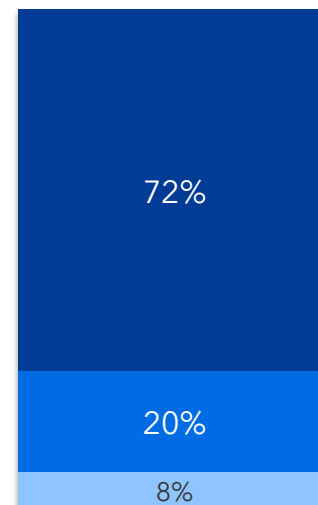
Australia ranked in the middle for Travel Confidence and continue to look at the COVID-19 situation within their destination for travel guidance

	AUSTRALIA	TOTAL 11M
Likely to travel in the next 12 months	72% ▼	76%
Consider leisure travel important during COVID-19	49% ▼	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	30% ▲	17%
Accepting of anticipated travel disruptions	36% ▼	47%
Comfortable with the reopening of borders	55% ▲	53%
Willing to share their personal information for safety	56% ▼	65%
Willing to share their personal information for greater personalization	46% ▼	57%
Have confidence with their market receiving international travelers	53% ▲	51%



Domestic travel looks set to continue driving the bulk of Australian travel

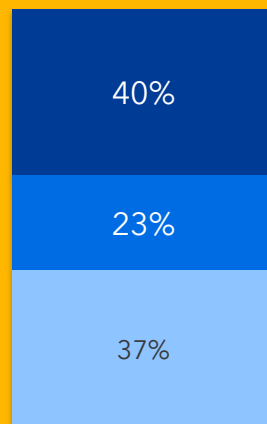
Likelihood of continuing to travel domestically even with the resumption of international travel



Unlikely Neutral Likely

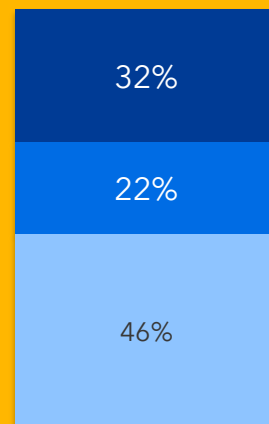
Despite this, a considerable number intend to travel internationally in the next 6 months, but most continue to look within the region for their first trip

Likelihood of international travel in the next 6 months



■ Unlikely ■ Neutral ■ Likely

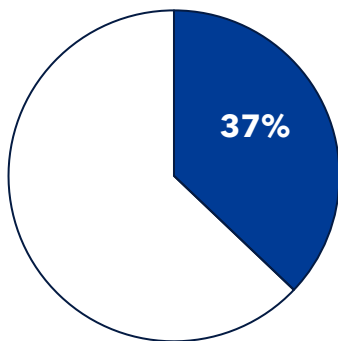
Likelihood of travelling beyond APAC for their first trip



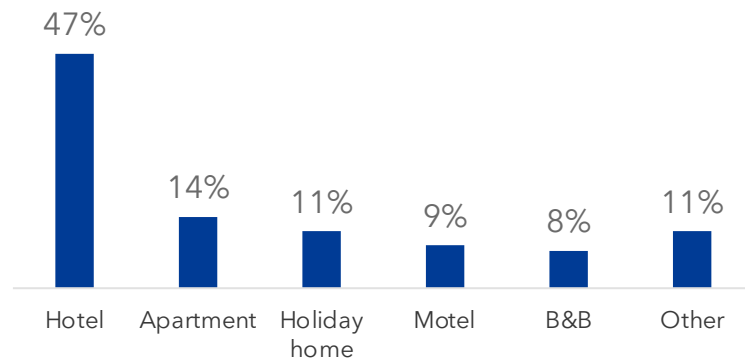
■ Unlikely ■ Neutral ■ Likely

Consistent across ANZ is the impact of the pandemic on the type of accommodation that travelers prefer. Hotels have emerged most popular, potentially due to a desire for more transparency around safety

Accommodation preferences have been changed by the pandemic



Preferred accommodation for next trip



Rank **6th**

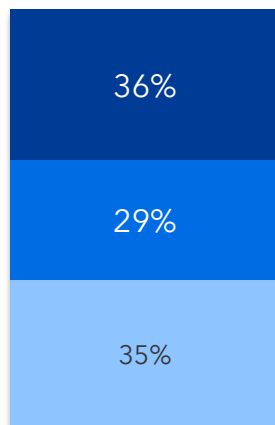
Singaporeans are confident when it comes to travel, however are less likely than the wider region to travel in the next 12 months

	SINGAPORE	TOTAL 11M
Likely to travel in the next 12 months	75% ▼	76%
Consider leisure travel important during COVID-19	42% ▼	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	25% ▲	17%
Accepting of anticipated travel disruptions	35% ▼	47%
Comfortable with the reopening of borders	56% ▲	53%
Willing to share their personal information for safety	57% ▼	65%
Willing to share their personal information for greater personalization	45% ▼	57%
Have confidence with their market receiving international travelers	56% ▲	51%



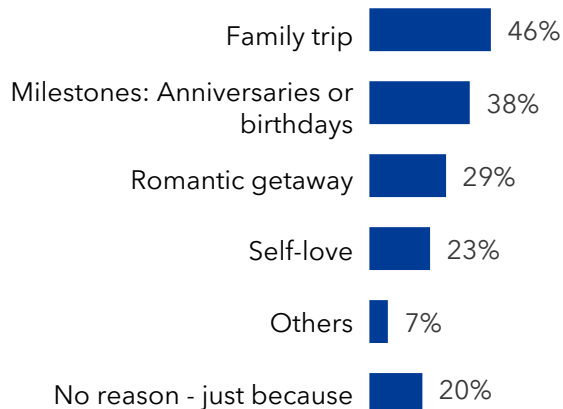
Staycations look set to stay part of the Singaporean holiday toolkit as an answer to family trips, milestones or even just because

Likelihood of booking Staycations when international travel resumes



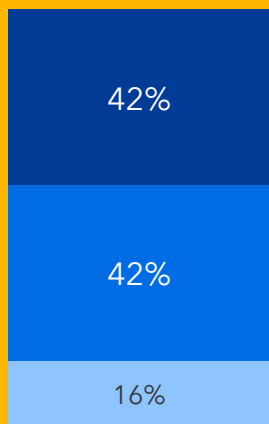
■ Unlikely ■ Neutral ■ Likely

Occasions for which to book Staycations



While 42% of Singaporeans place importance on sustainable travel decisions, motivations around affordability and convenience are key

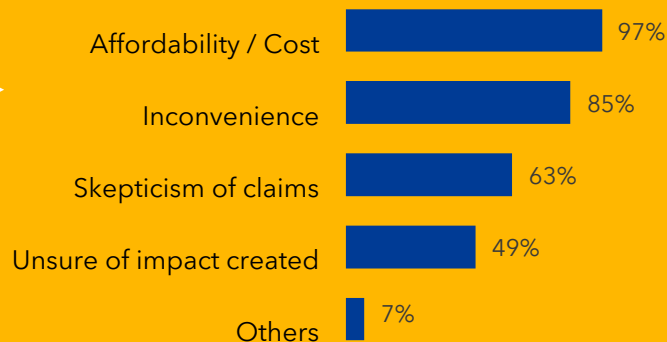
Importance of making sustainable travel decisions



■ Not important ■ Neutral
■ Important

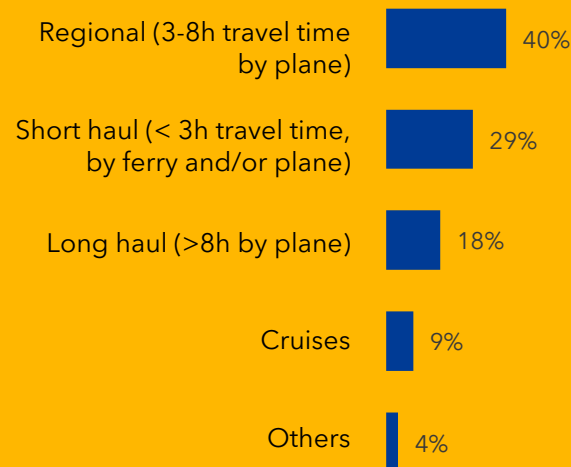
Top concerns that impact making sustainable travel decisions

(Base n=843 -> T2B + neutral)



When it comes to holiday trips, Singaporeans want to stay within the region

Post-pandemic holiday preferences



Rank **7th**

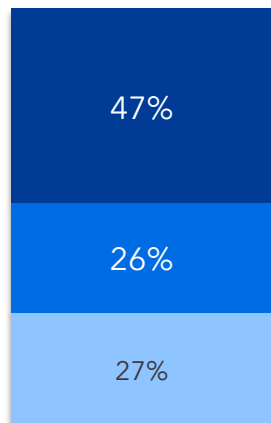
71% of Hong Kong travelers plan to travel in the next 12 months but the majority will still postpone a trip in case of a COVID-19 surge

	HONG KONG	TOTAL 11M
Likely to travel in the next 12 months	71% ▼	76%
Consider leisure travel important during COVID-19	55% ▲	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	16% ▼	17%
Accepting of anticipated travel disruptions	50% ▲	47%
Comfortable with the reopening of borders	44% ▼	53%
Willing to share their personal information for safety	63% ▼	65%
Willing to share their personal information for greater personalization	57% ▼	57%
Have confidence with their market receiving international travelers	48% ▼	51%



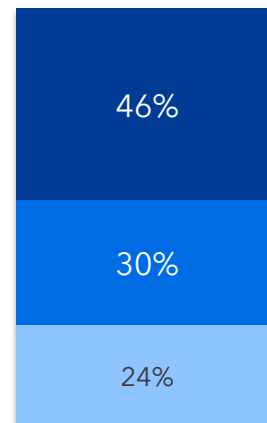
Staycations are set to stay popular among Hong Kong travelers with many likely to focus on getting closer to nature

Likelihood of booking a staycation when international travel resumes



■ Unlikely ■ Neutral ■ Likely

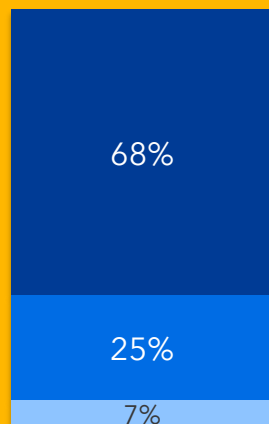
Likelihood of engaging in local outdoor activities (i.e. camping) when international travel resumes



■ Unlikely ■ Neutral ■ Likely

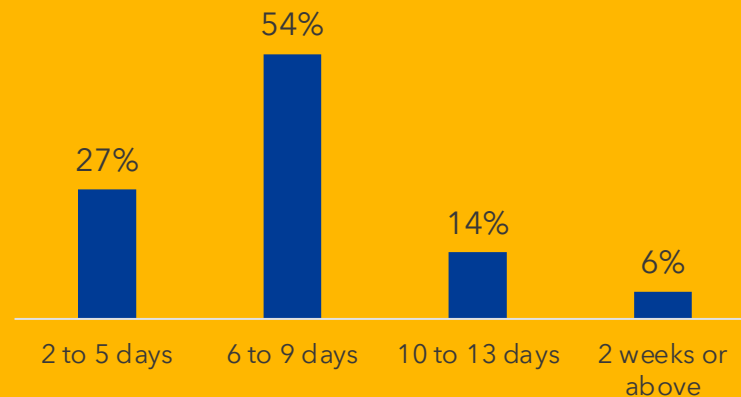
Meanwhile, the majority of Hong Kong travelers likely to travel internationally fueled by the implementation of travel bubbles with most looking to spend about a week away

Likelihood of travelling internationally with the implementation of travel bubbles



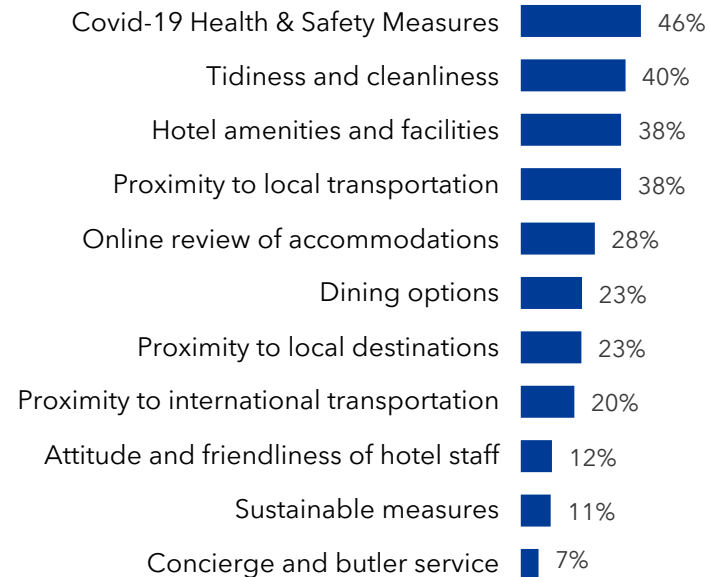
■ Unlikely ■ Neutral ■ Likely

Ideal trip length once international travel resumes



Besides safety measures and cleanliness, hotel amenities and proximity to local transportation are factors that impact the types of accommodation Hong Kong travelers will book

Top considerations that impact accommodation choices for both domestic and international travel



Rank **8th**

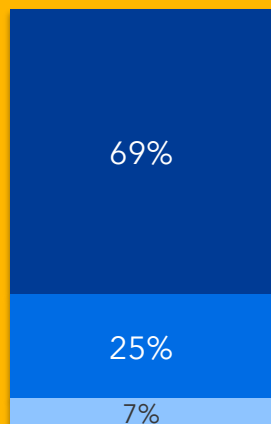
Thai travelers ranked low on the index with a particular discomfort both with the reopening of borders and welcoming travelers to their shores

	THAILAND	TOTAL 11M
Likely to travel in the next 12 months	70% ▼	76%
Consider leisure travel important during COVID-19	63% ▲	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	14% ▼	17%
Accepting of anticipated travel disruptions	66% ▲	47%
Comfortable with the reopening of borders	39% ▼	53%
Willing to share their personal information for safety	65% ▼	65%
Willing to share their personal information for greater personalization	58% ▲	57%
Have confidence with their market receiving international travelers	29% ▼	51%



Nearly three in four Thai travelers would continue looking domestically for travel inspiration with a large number looking for time to relax close to nature

Likelihood of continued domestic travel with the resumption of International travel



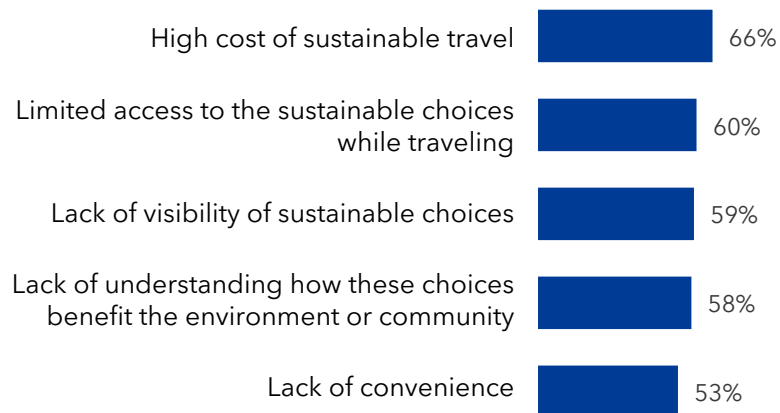
■ Unlikely ■ Neutral ■ Likely

Motivations for travel during the pandemic



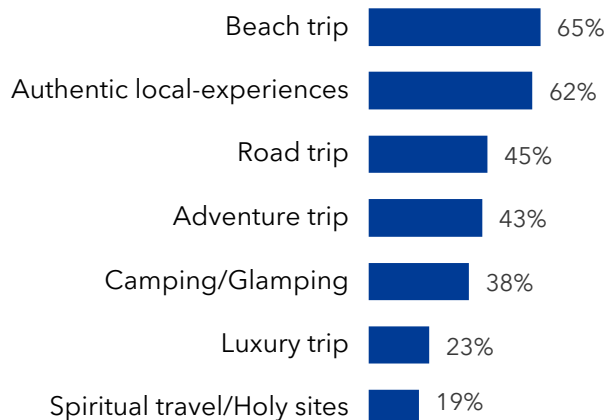
For Thai travelers, the high costs associated with sustainability impact their desire to make sustainable travel decisions

Concerns around sustainable travel

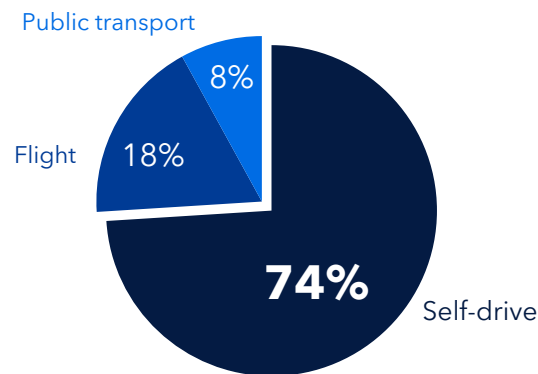


For most, self-driving is the preferred way to get around with the majority looking toward beach vacations for some sun and sand

Domestic trip ideas that most appeal to Thai travelers



Preferred Mode of Transportation for Travel





Korean travelers showcased a low confidence across the board and yet are likely to travel in the next 12 months

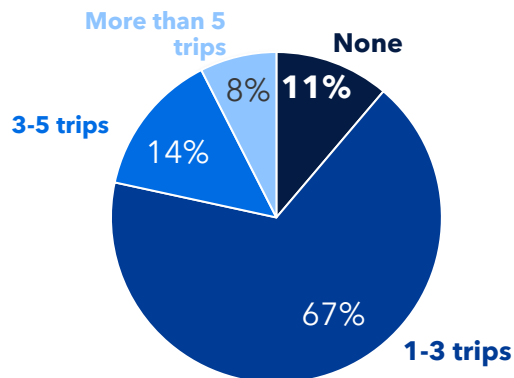
Rank **9th**

	KOREA	TOTAL 11M
Likely to travel in the next 12 months	80% ▲	76%
Consider leisure travel important during COVID-19	54% ▼	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	14% ▼	17%
Accepting of anticipated travel disruptions	31% ▼	47%
Comfortable with the reopening of borders	45% ▼	53%
Willing to share their personal information for safety	59% ▼	65%
Willing to share their personal information for greater personalization	53% ▼	57%
Have confidence with their market receiving international travelers	41% ▼	51%

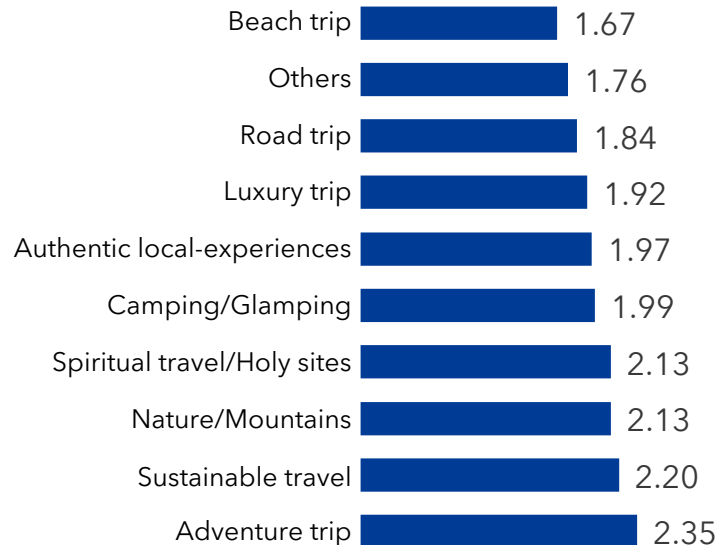


Most travelers see themselves taking up to 3 domestic trips in 2022 with a focus on the beach and road trips through the country

Number of domestic trips planned in 2022



Trip Types Preferred (Weighted Rank)

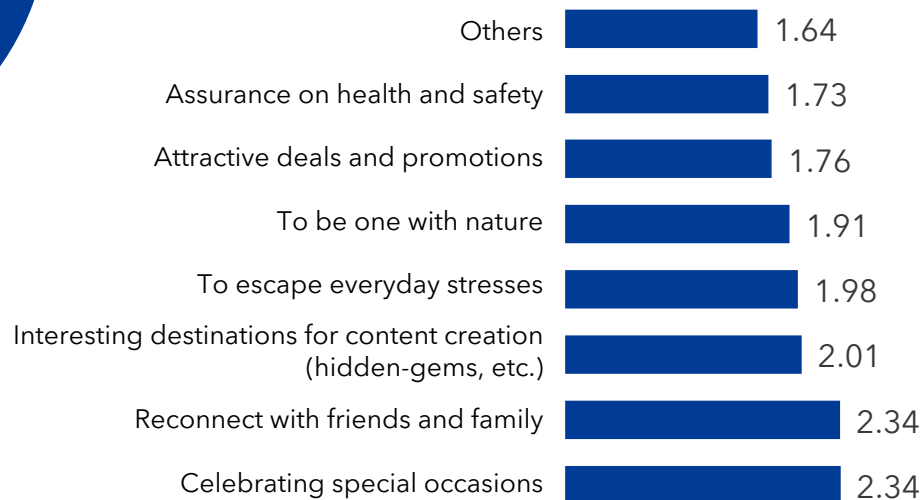


Base: KR Respondents (n=1,000)

Question: How many domestic trips do you see yourself embarking on in 2022 once international travel resumes? | What kind of trips are you most keen to embark on?

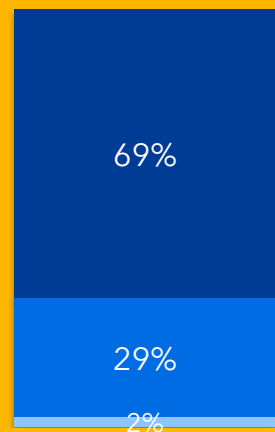
For Koreans, special occasions and loved ones are motivation enough to travel even during the pandemic

Top Motivations for Travel Despite the Ongoing Pandemic (Weighted Rank)



For Korean travelers, an accommodation's implementation of sustainable practices make it more appealing. Other things they consider are the amenities alongside an overall cleanliness

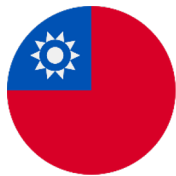
Likelihood of choosing accommodations that implement sustainable measures



■ Unlikely ■ Neutral ■ Likely

Top considerations when choosing travel accommodation (Weighted Rank)



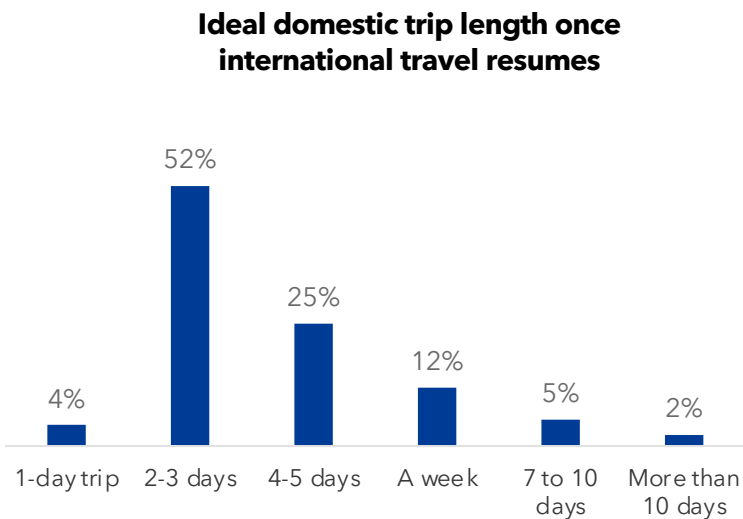
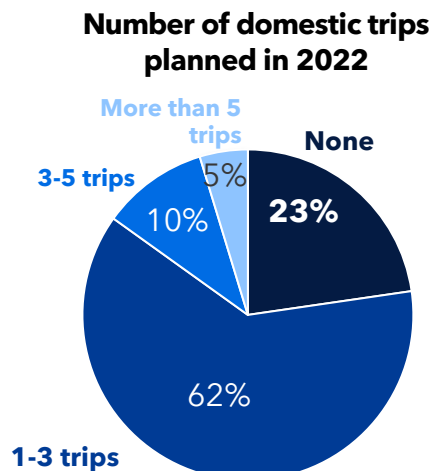
Rank **10th**

Taiwanese travelers see themselves heading abroad in the next 12 months but are not fully confident or comfortable with the idea of open borders

	TAIWAN	TOTAL 11M
Likely to travel in the next 12 months	70% ▼	76%
Consider leisure travel important during COVID-19	41% ▼	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	8% ▼	17%
Accepting of anticipated travel disruptions	68% ▲	47%
Comfortable with the reopening of borders	27% ▼	53%
Willing to share their personal information for safety	68% ▲	65%
Willing to share their personal information for greater personalization	65% ▲	57%
Have confidence with their market receiving international travelers	28% ▼	51%



Most Taiwanese travelers are looking at embarking on up to three domestic trips in 2022, spending two to three days away at a time

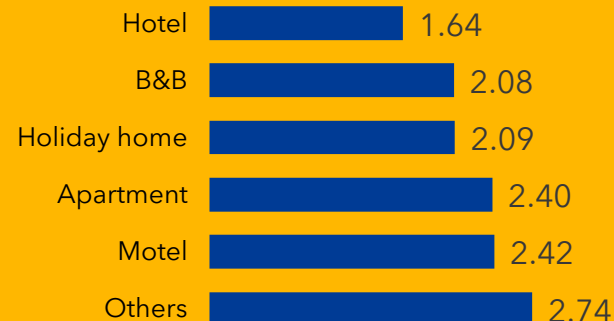


When booking accommodation, Taiwanese travelers place importance on health and safety measures alongside the experiences of past travelers. For them, hotels and B&Bs are where they usually look

**Top considerations when booking accommodations
(Weighted Rank)**

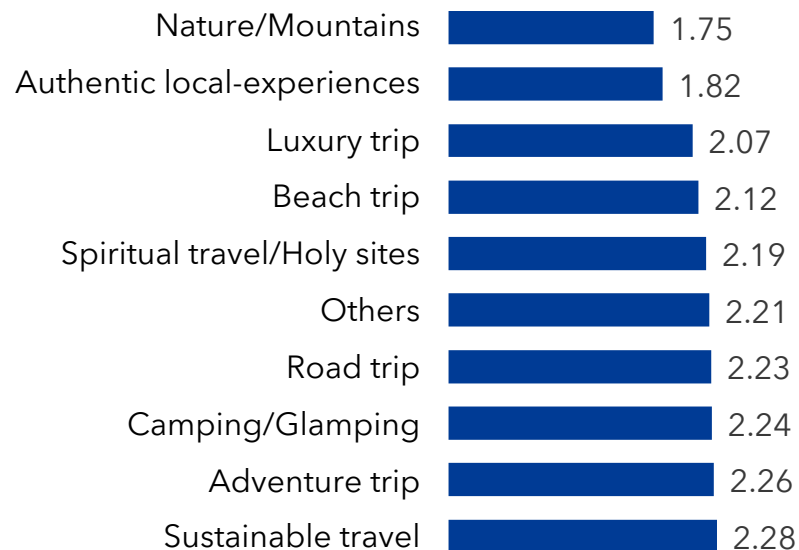


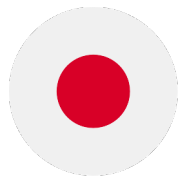
**Preferred types of accommodation
(Weighted Rank)**



**Taiwanese travelers are
nature lovers who also
appreciate authentic
local experiences**

**Trip types preferred for domestic travel
(Weighted Rank)**



Rank **11th**

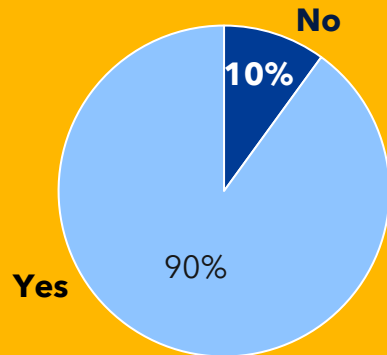
Japanese travelers ranked consistently lower against the regional average with the lowest number of respondents likely to travel in the next 12 months

	JAPAN	TOTAL 11M
Likely to travel in the next 12 months	62% ▼	76%
Consider leisure travel important during COVID-19	34% ▼	54%
Would not postpone a trip despite surge in COVID-19 cases at their destination	19% ▲	17%
Accepting of anticipated travel disruptions	24% ▼	47%
Comfortable with the reopening of borders	26% ▼	53%
Willing to share their personal information for safety	47% ▼	65%
Willing to share their personal information for greater personalization	42% ▼	57%
Have confidence with their market receiving international travelers	18% ▼	51%

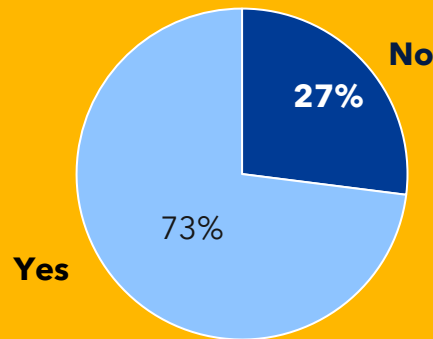


9 in 10 have not travelled in two years thanks to COVID-19 and but a majority plan to travel during the upcoming summer season

Have travelled internationally since the start of COVID-19 (2020)



Travelers that plan to travel either domestically or internationally during Golden Week / Summer / Obon

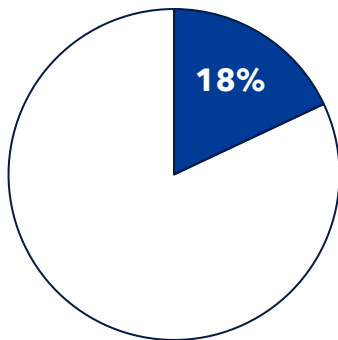


Base: JP Respondents (n=1,000)

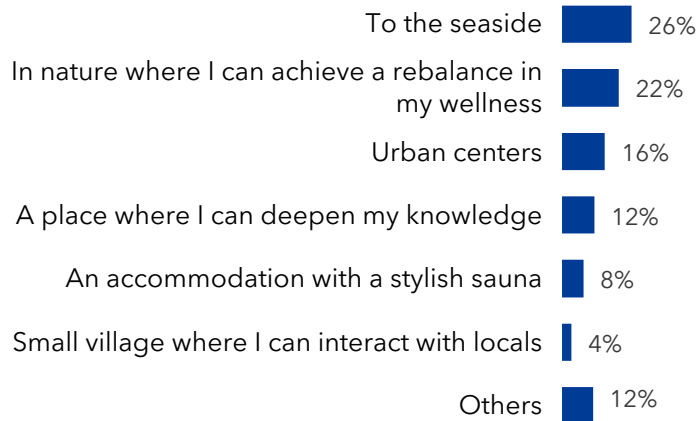
Question: Have you travelled internationally since the start of the pandemic (2020)? | Do you have any travel plans, either locally or internationally for Golden Week (April 29; May 3-6 2022) Summer / Obon holiday as of now?

Japanese travelers do not feel informed enough about overseas travel but are hoping to go somewhere where the ocean is beautiful and other nature-inspired locations once they can

Feel well-informed about regulations around overseas travel



Travel destinations most keen to visit when travel resumes



Japanese travelers look at the small things they can do around waste generation and bottles when looking at how to be more sustainable while traveling

Ways travelers try to be more sustainable





SPOTTING OPPORTUNITIES

Identifying nuances on travel considerations
across markets

The main trigger for booking a trip is to get away and avoid feeling stuck

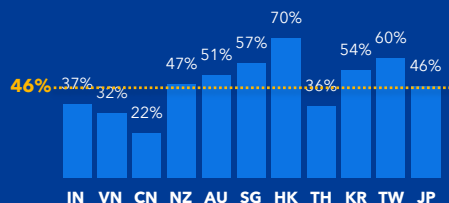
India: Have more varied triggers, such as visiting a new destination, visiting family, and continuing a postponed trip.

China: Mainly want to continue a postponed trip or travel a new destination

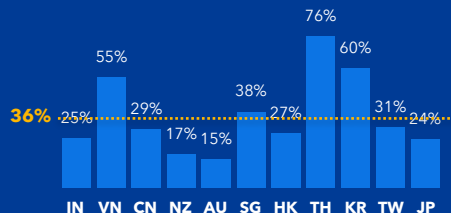
New Zealand & Australia: Motivated to travel in order to visit family.

TRIP TRIGGERS

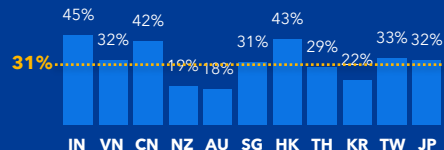
I just want to get away / feel stuck at home



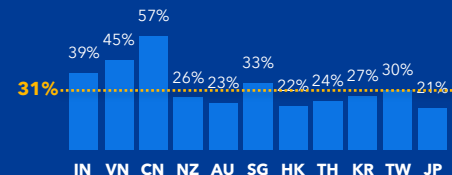
Mental wellness retreat



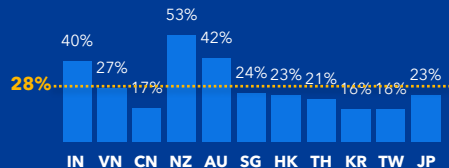
I want to visit a destination I just heard about



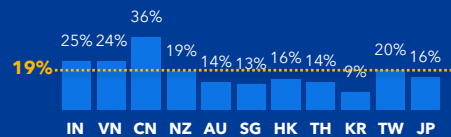
I planned for this trip before the pandemic and it's time to go!



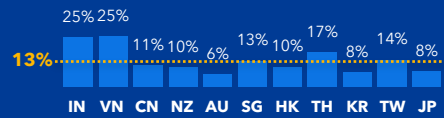
I want to visit my family



There is an event that I would like to attend (sports, concert, etc.)



Work travel



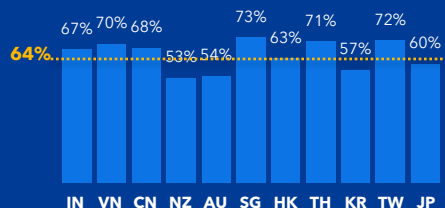
Top travel considerations are mainly safety, cost, and convenience

China: Additional administration that comes with traveling during the pandemic is weighs slightly heavier compared to other markets.

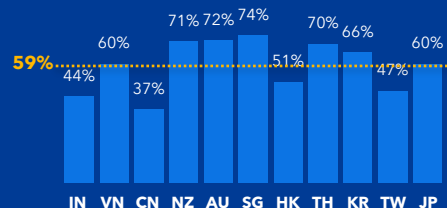
Hong Kong: Quarantine periods are of a bigger consideration, relative to other markets.

TOP TRAVEL CONSIDERATIONS

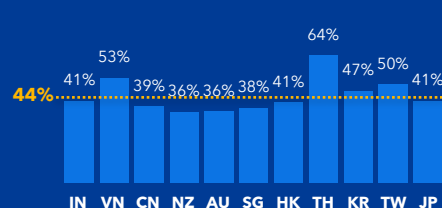
Safety



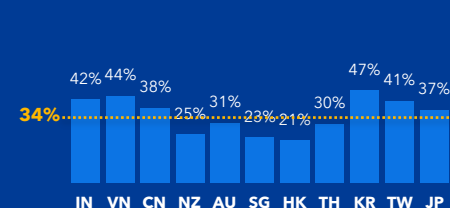
Cost



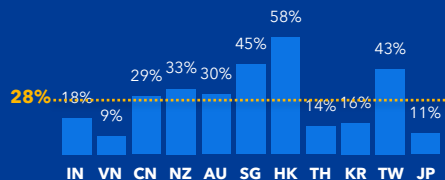
Convenience



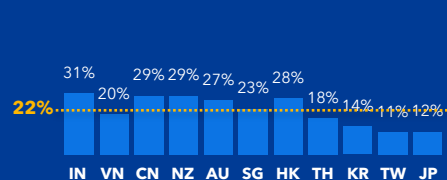
Variety of destinations and hotels/resorts



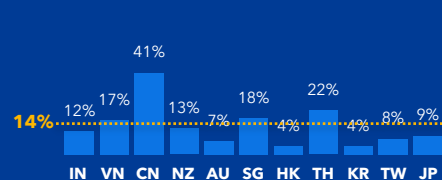
Quarantine periods



Vaccination rate of the destination I am traveling to



Additional admin to be done



Concerns vary per market, but all show a degree of concern of travel costs, quarantining, getting stuck in destinations, and falling sick

China: Both a consideration and a concern, processes and admin hassles affect Chinese travel.

Singapore: High concern placed on last minute cancellations due to border restrictions.

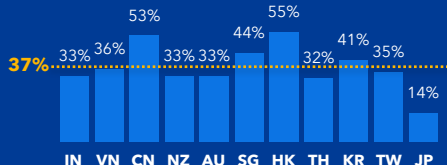
Thailand: Putting family and friends at risk becomes a bigger concern.

TRAVEL CONCERNS

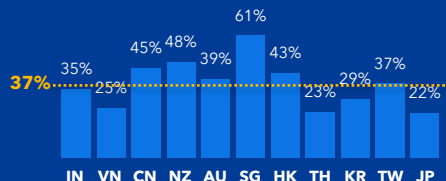
Cost



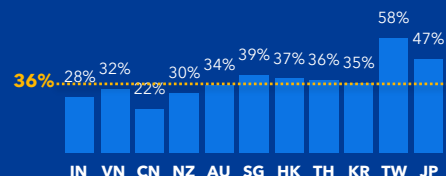
Having to undergo quarantine either at my destination or in my home country



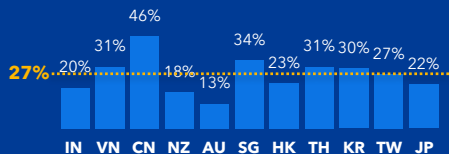
Possibility of getting stuck at the destination because of new regulations at the border



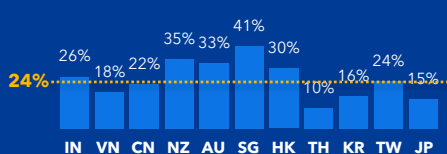
Fear of falling sick



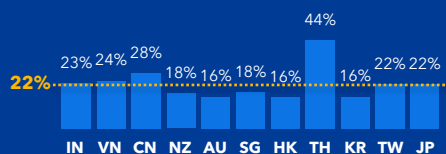
Processes and admin hassles involved in planning a trip



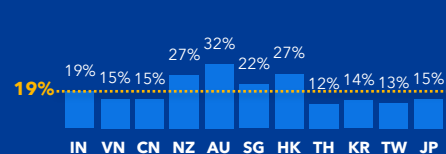
Having to cancel my booking at the last minute because of border restrictions



Putting my family and friends at risk



Having flights cancelled

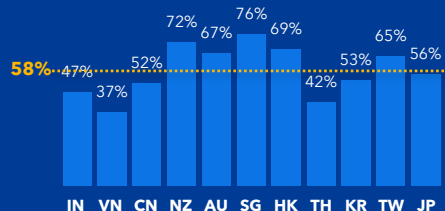


Travelers across all markets seek flexible cancellations and clear refund information on their trips

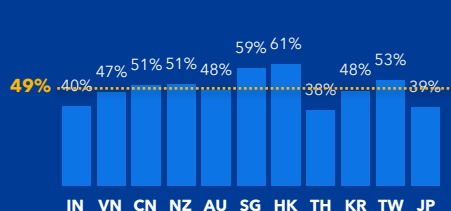
China and **Japan**: Higher support sought for peace of mind around knowing that airlines and hotels are clean.

SUPPORT SOUGHT FROM TRAVEL AGENCIES AND ACCOMMODATIONS

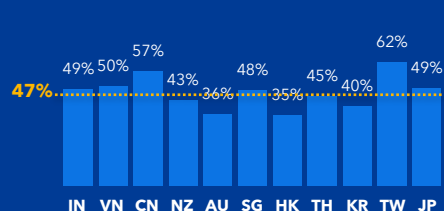
Access to flexible cancellations and clear refund information



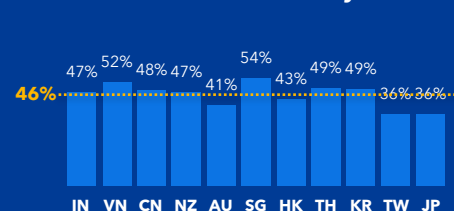
Guidance on the latest travel and border restrictions



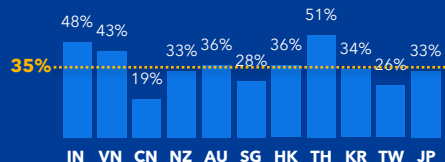
Guidance on what to expect from my travel experience



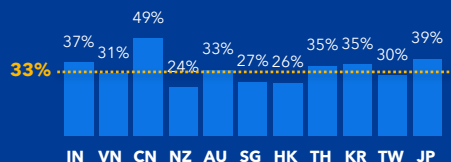
Clear guidance on the respective requirements airlines and accommodations may have



Easy access to customer support



Knowing airlines and hotels are clean



Base: All Respondents (n=1,000 for each market)

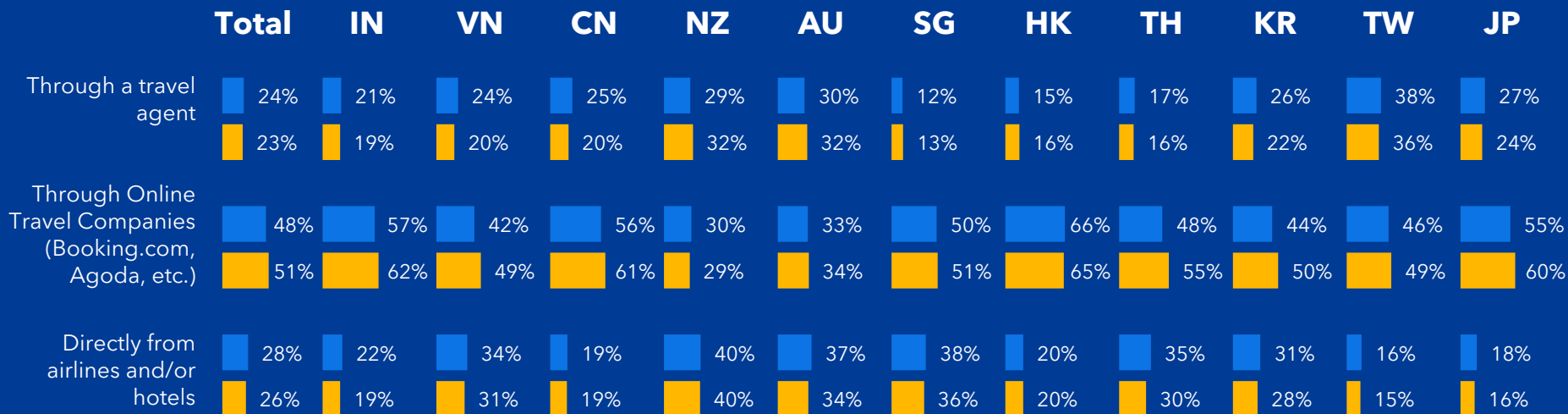
Question: What are the top 3 types of support you expect from airlines, hotels and online travel companies (like Trip.com, Booking.com, Agoda, Traveloka) in order to travel with peace of mind?

Online Travel Companies are still the go-to for booking travel - both before and after the pandemic

New Zealand: Booking directly from airlines and/ or hotels is the most used mode of booking.

Australia: Modes of booking are a bit more varied compared to other markets and do not rely solely on travel companies.

MODES OF TRIP BOOKING



Legend:

Pre-Pandemic Modes of Booking
 Modes of Booking for Next Trip

Base: All Respondents (n=1,000 for each market)

Question: How did you most often book your travels prior to the pandemic? | How do you plan to book your next trip?

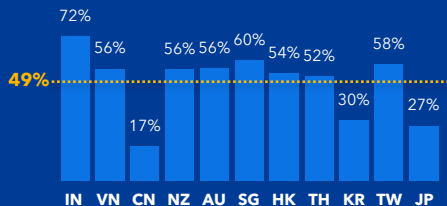
Milieu Insights prepared for Booking.com 2022

Booking.com emerges the market leaders across the majority of APAC though slightly weaker in China, Japan and Korea

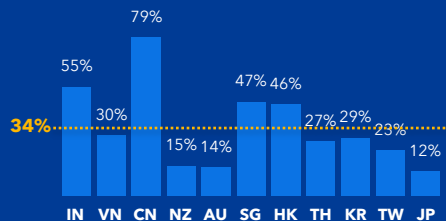
Japan: More than half use another unspecified online travel company for trip bookings.

ONLINE TRAVEL COMPANIES CONSIDERED

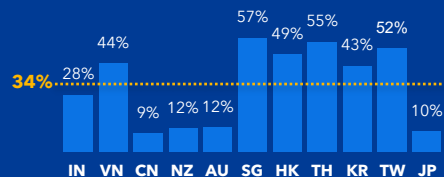
Booking.com



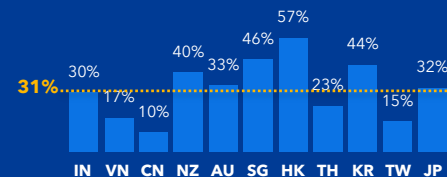
Trip.com



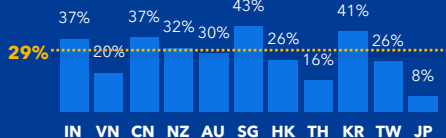
Agoda



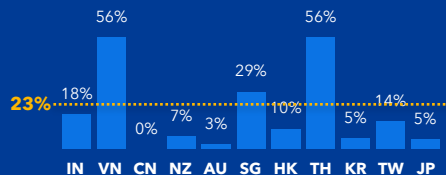
Expedia



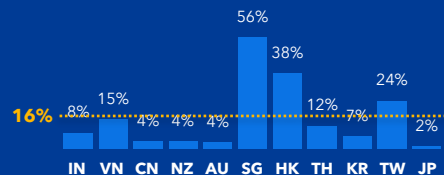
Airbnb



Traveloka



Klook



Stayz



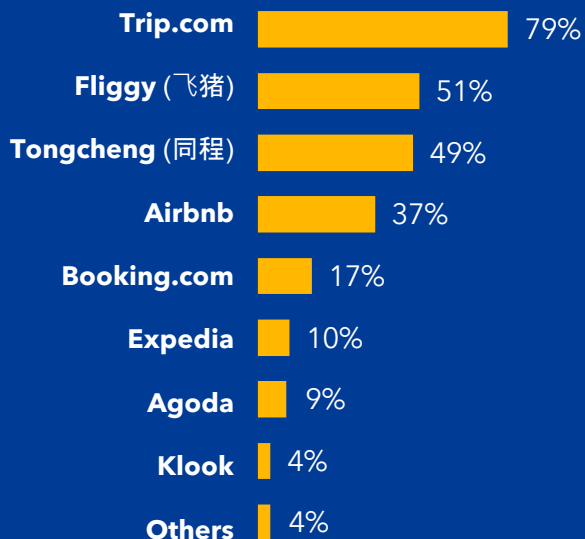
Base: All Respondents (n=1,000 for each market)

Question: Online travel companies are online platforms like websites that sell or provide services related to travel. Which of these Online Travel Companies would you consider when booking your next trip?

In China, Trip.com emerges the leader across Online Travel Companies

ONLINE TRAVEL COMPANIES CONSIDERED (CHINA)

Most popular Online Travel Companies in China



Base: All Respondents (n=1,000 for each market)

Question: Online travel companies are online platforms like websites that sell or provide services related to travel. Which of these Online Travel Companies would you consider when booking your next trip?

Travel costs and convenience (via flexible cancellations) factor strongly when it comes to booking travel

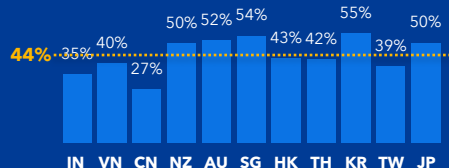
China: Higher consideration placed on allowing multiple aspects of trip (e.g. flights, accommodation, rental cars, attractions).

Thailand: Options for different payment types are of bigger consideration compared to other markets.

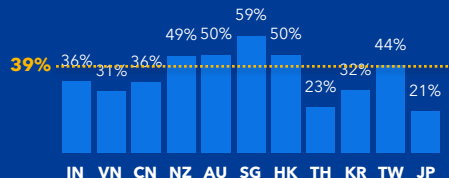
Japan: Ease of use is a very important factor in choosing an online travel company.

CONSIDERATIONS FOR CHOOSING ONLINE TRAVEL COMPANIES

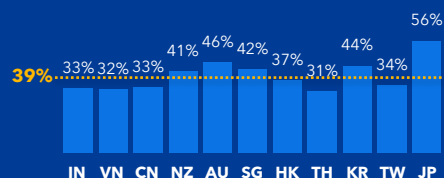
Cost of stay or trip



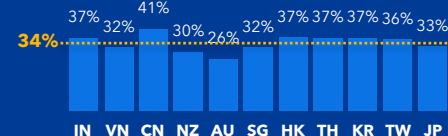
Flexible cancellation policy



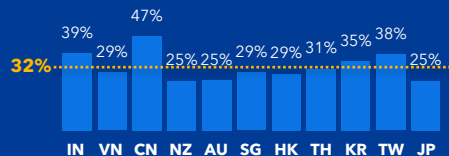
Ease of use



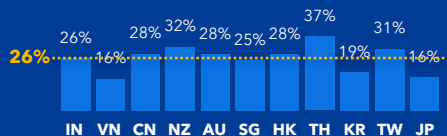
Variety of accommodation types options (e.g. hotels, serviced apartments, lodges etc)



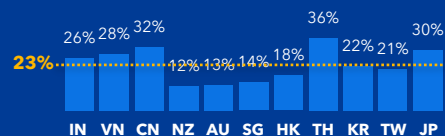
Allows me to book multiple aspects of my trip (e.g. flights, accommodation, rental cars, attractions)



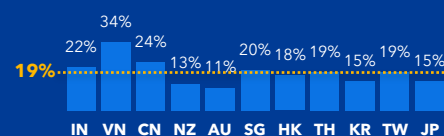
Familiarity with the brand and platform



Options for different payment types (bank transfer, credit card, QR code, mobile wallets)



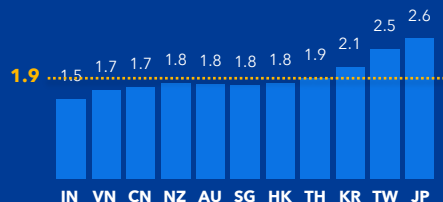
Options for different payment terms (prepayment, payment at merchant)



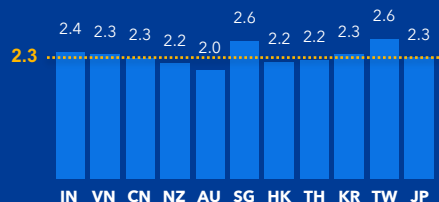
Travelers across all markets continue to use online travel companies primarily for booking accommodation and flights

TRAVEL VERTICALS OFFERED BY ONLINE TRAVEL COMPANIES

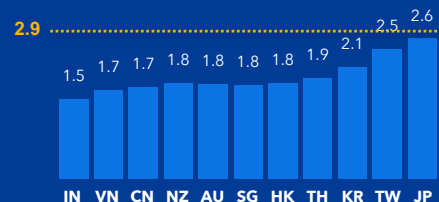
Accommodation



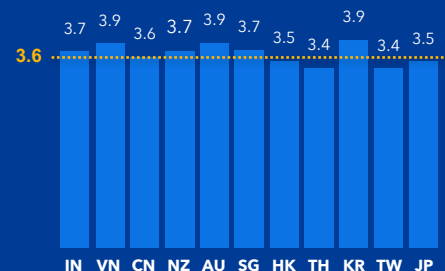
Flights



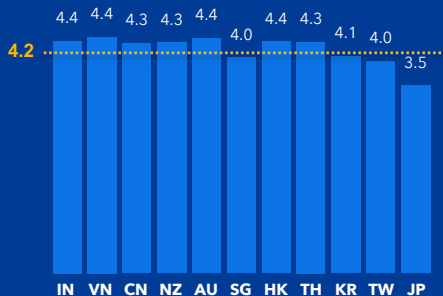
Experiences (Tours, etc)



Rentals



Taxis

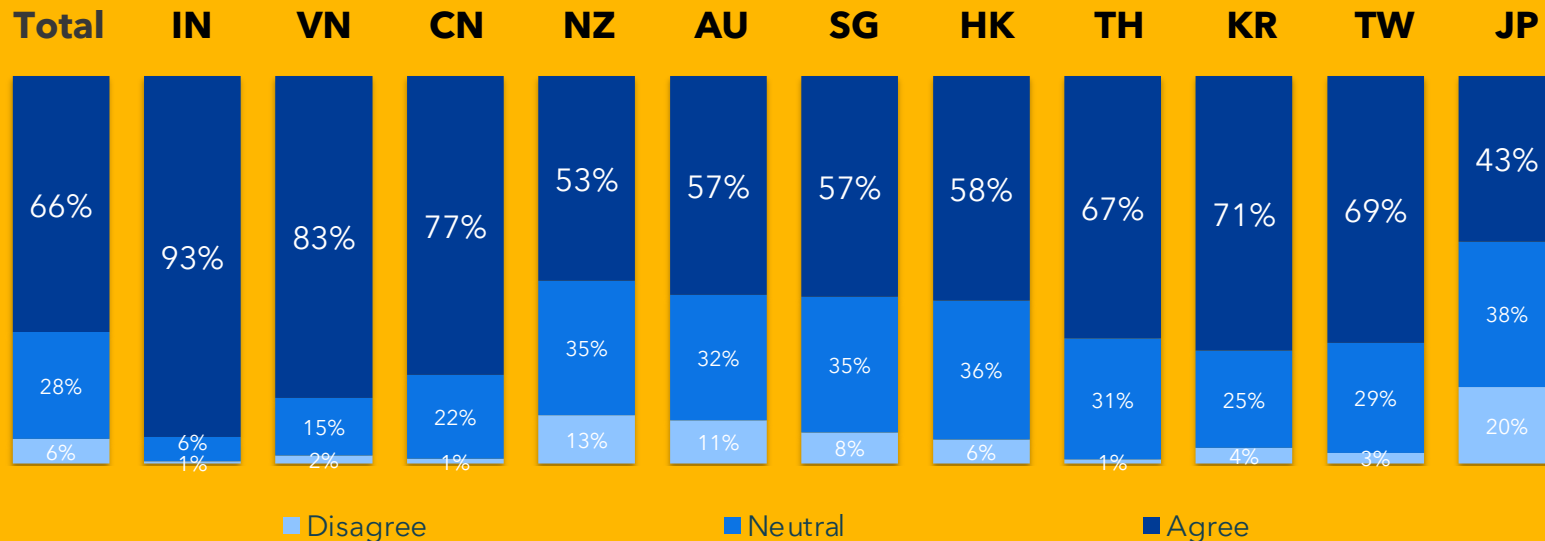


Base: All Respondents (n=1,000 for each market)

Question: What aspects of your trip would you most frequently use Online Travel Companies for? Please rank from 1-5, 1 for most frequently used.

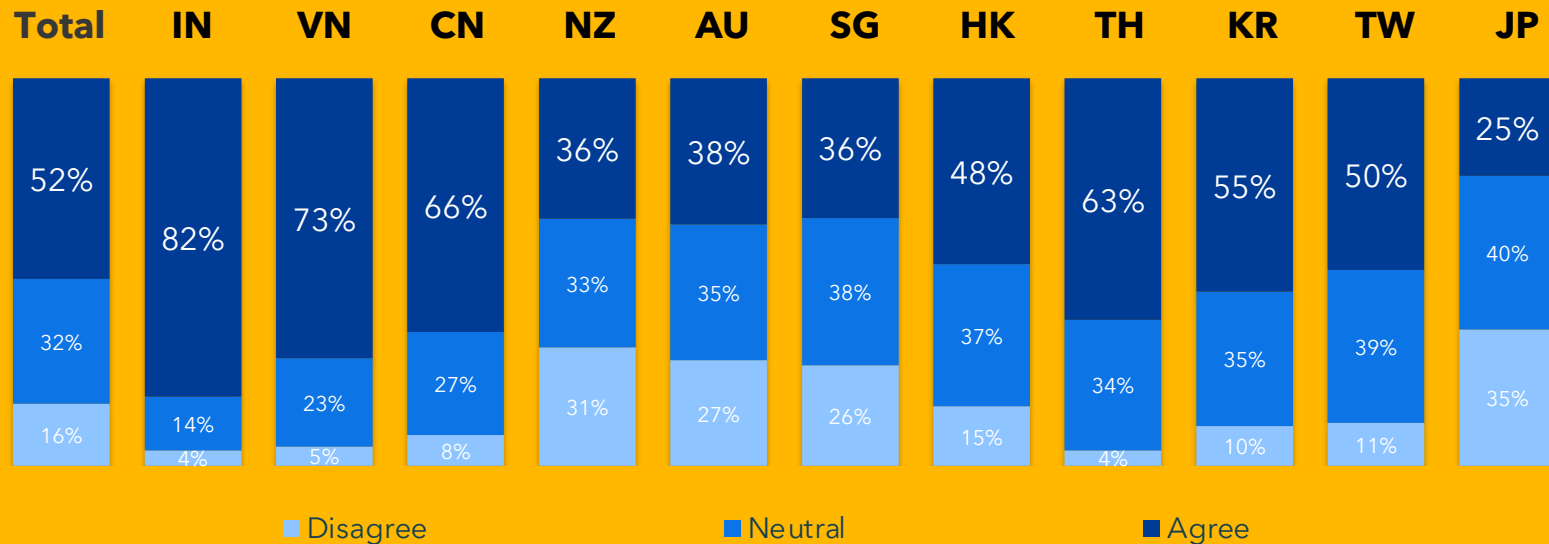
Making sustainable travel-related decisions is important to travelers, especially so for those in China, India and Vietnam

IMPORTANCE OF SUSTAINABLE TRAVEL DECISIONS



Travelers across APAC are generally willing to pay more for sustainable options, with Indonesia and Vietnam most open to doing so

WILLINGNESS TO PAY MORE FOR SUSTAINABILITY



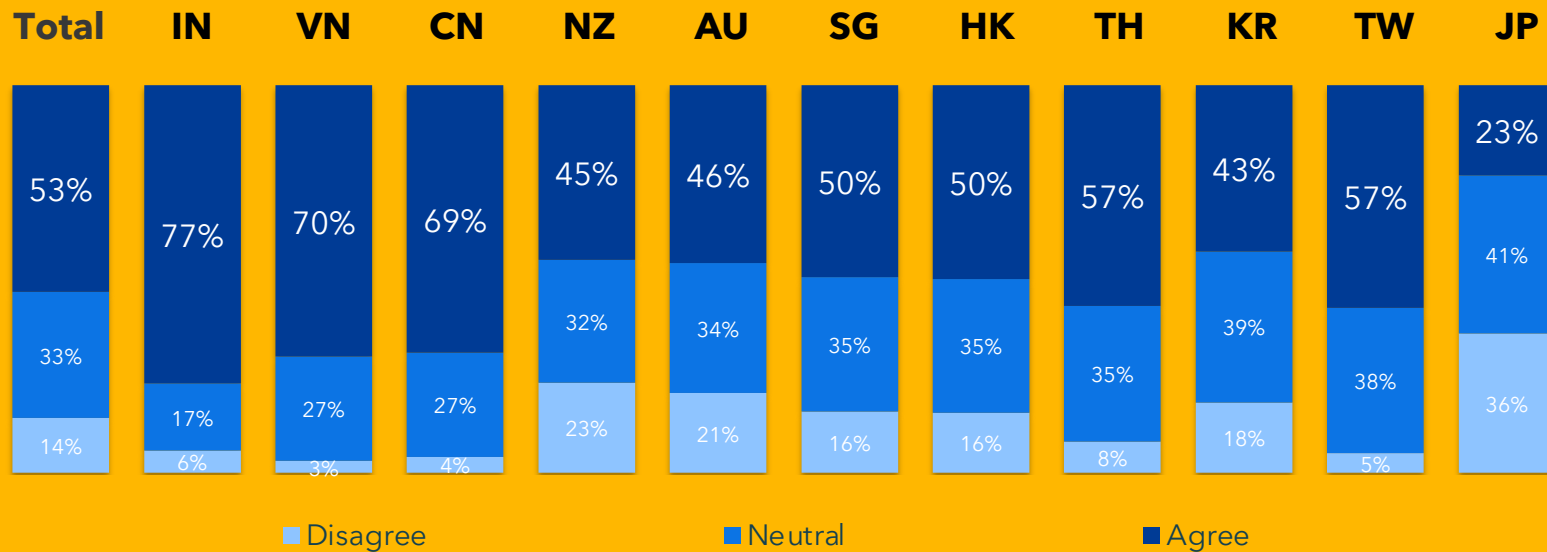
Base: All Respondents (n=1,000 for each market)

Question: How far do you agree with this statement? "I am willing to pay more if it means that I can make more sustainable choices".

Milieu Insights prepared for Booking.com 2022

APAC Travelers are generally willing to have less variety in accommodation - as long as they are sustainable options

WILLINGNESS TO HAVE LESS VARIETY FOR SUSTAINABILITY



Base: All Respondents (n=1,000 for each market)

Question: How far do you agree with this statement? "I am ok to have less variety in options (three potential accommodation choices instead of 50) as long as my travel decisions are sustainable".



WAY FORWARD

Summary of Results



INDIA

Rank 1st

- **Majority are likely to travel domestically** once restrictions are lifted, mainly with family and spouse/partner
- **Health and safety** are of utmost concern, and most travelers opt for **season-based travel**
- **A variety of trip types** are sought after by Indians who are up for luxury trips, nature-related activities, sustainable trips, beach trips, road trips, and mountains



VIETNAM

Rank 2nd

- More than half prefer to take **at least 1-2 trips** (either domestic or internationally) for the next 12 months, either short haul or regional type of trip
- **Health, safety, and budget** are of utmost priority for travelers, with preferences on looking for authentic local experiences, beaches, and nature
- **A variety of sustainable practices are considered important**, such as eating locally-sourced food and joining activities and tours by locals



CHINA

Rank 3rd

- A big majority prefer to have **at least 1-3 domestic trips** within the year
- **The majority plan to head overseas** once China's quarantine policy lifts while those who don't, plan on waiting more than 6 months before they do
- In terms of international travel plans, **majority prefer to travel within the vicinity** (Japan/Korea and SEA), lasting for 1 week or shorter
- **Additional admin work to be done** is bit a more highly considered compared to other markets.



NEW ZEALAND

Rank 4th

- Despite the resumption of international travel, **a large majority would still like to continue spending holidays at home**
- **Almost half still have the intention to travel internationally in the next 6 months**, and a considerable number (36%) intend to go outside APAC
- **A small number (38%) claim that the pandemic has affected the type of accommodation they prefer to stay in** - majority prefer hotels



AUSTRALIA

Rank 5th

- Despite the resumption of international travel, **7 out of 10 would still like to continue spending holidays at home**
- **Some (40%) still intend to travel internationally in the next 6 months**, with a considerable proportion (32%) intending to travel out of APAC
- **A small number (37%) claim the pandemic has affected the type of accommodation they prefer to stay in** – majority prefer hotels



SINGAPORE

Rank 6th

- A small number (36%) intend to still do local staycations once international travel resumes, for **family trips or milestone trips (e.g. birthdays)**
- Making sustainable travel decisions is seen to be important by some (42%), with **affordability/cost and inconvenience** as top concerns for sustainable choices
- When it comes to holiday trips, **short haul to regional trips are preferred**
- High concern is placed on **last minute cancellations due to border restrictions.**



HONG KONG

Rank 7th

- **Almost half are likely to book domestic staycations** once international travel resumes
- Meanwhile, **majority (68%) are likely to travel internationally given the implementation of travel bubbles**, going for a duration of 6-9 days or less
- Besides safety measures and cleanliness, **hotel amenities/facilities and proximity to local transportation** are factors that impact booking accommodation
- **Mandatory quarantine time** is a big consideration when it comes to deciding to travel



THAILAND

Rank 8th

- **A big majority (69%) would still holiday at home even when international travel is possible**
- A number of concerns are considered regarding taking sustainable trips, but **cost of access to sustainable journey** is the top concern
- Meanwhile, a big majority would prefer **self-driving (74%)** as main mode of transportation, going to **beach trips and authentic local experiences**



KOREA

Rank 9th

- **Majority (67%) plan 1-3 domestic trips for this year**, preferring beach trips, road trips, and even luxury trips
- **Key motivations to book travel include** - to celebrate special occasions, to reconnect, to visit hidden gems, and to relax are stand-outs
- **Travelers are likely to choose accommodation that practices sustainable measures**, considering cleanliness, amenities, and proximity to local destinations



TAIWAN

Rank 10th

- **Majority plan 1-3 (62% domestic trips for this year)**, mostly lasting for 2-3 days or less
- **Safety measures are the main consideration** for booking accommodations, followed by online reviews and proximity to local destinations
- Preferences are varied for domestic trips with **nature/mountains and authentic local experiences as the most preferred**



JAPAN

Rank 11th

- **An overwhelming majority (90%) have not travelled - both overseas or domestically - since the pandemic**, but around a third plan to travel in the coming summer.
- Travelers are **not yet well-informed** on information on overseas travel
- Sustainability practices have been done by travelers, with **reducing waste generation** as the top practice done by most

Prepared by Milieu Insight, Inc.:

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