Navigating APAC Consumers’ Fluid Travel Plans

October 2023
Travel momentum in APAC: Rising Interest with a dose of thoughtfulness

Across diverse APAC markets surveyed, a shared surge of enthusiasm and curiosity towards travel is evident. Remarkably, amidst this heightened interest, respondents have articulated a discerning and cautious approach to their travel plans, underscoring a deliberate choice to prioritize quality over quantity.

<table>
<thead>
<tr>
<th>Country</th>
<th>YoY Increase in Search Interest in the Travel Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>Korea</td>
<td>49%</td>
</tr>
<tr>
<td>Japan</td>
<td>15%</td>
</tr>
<tr>
<td>Thailand</td>
<td>11%</td>
</tr>
<tr>
<td>India</td>
<td>10%</td>
</tr>
<tr>
<td>Indonesia</td>
<td>8%</td>
</tr>
<tr>
<td>Australia</td>
<td>6%</td>
</tr>
</tbody>
</table>

Yet, quality trumps quantity

fewer trips in the next 12 months compared to the last 12 months


Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023.
Recent explorers are twice as eager to embark on their next adventure

Travelers who recently* took trips **intend to take**

*In the last 12 months

Source: Google/ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023

the number of trips as those who didn’t travel recently*
There’s a yearning for experiences that challenge and enrich.

There’s a wide variety of motivations across travelers in surveyed APAC markets. This reflects the multifaceted nature of travel’s appeal in the region. A significant majority of travelers see travel as a means of pursuing adventure and personal growth, and show a desire for transformative experiences that go beyond mere sightseeing.

Net % selected this as a statement that best describes the role of travel for them

- **Adventure / discovery**: 84%
- **Personal growth / Meaning**: 83%
- **Healing / Stress relief**: 71%
- **Making best of time / Resources**: 56%
- **Social connection**: 54%
- **Achievement**: 16%

Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023

Top selection in KR
More important for ID and TH travelers
Close to 1 in 4 travelers in CN, IN, and ID see travel as a life achievement / status symbol
Travelers draw inspiration from a multitude of sources

Travelers get their spark of inspiration from 4 sources on average. These span online video platforms, entertainment media, social media, offline interactions, articles, messaging platforms and more. Leisure travelers especially lean on online video.

<table>
<thead>
<tr>
<th>Country</th>
<th>Average No. of Inspiration Sources for Their Trip</th>
</tr>
</thead>
<tbody>
<tr>
<td>Australia</td>
<td>3.01</td>
</tr>
<tr>
<td>China</td>
<td>4.30</td>
</tr>
<tr>
<td>India</td>
<td>5.87</td>
</tr>
<tr>
<td>Indonesia</td>
<td>4.87</td>
</tr>
<tr>
<td>Japan</td>
<td>1.84</td>
</tr>
<tr>
<td>South Korea</td>
<td>2.84</td>
</tr>
<tr>
<td>Thailand</td>
<td>4.77</td>
</tr>
</tbody>
</table>

Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023
YouTube is the #1 source of travel inspiration for surveyed travelers in APAC compared to other sources including video platforms, social platforms, entertainment media, and offline channels.

Source: Google/ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023
And some unexpected sources catch the eye

Video serves as the primary source of travel inspiration for leisure trips. However, a significant number of travelers ignite their wanderlust through less traditional media. Think immersive worlds within video games, captivating locales featured in TV dramas or movies, or even the insights provided by AI chatbots — travel ideas can strike anyone, anywhere.

% of surveyed travelers listing a source as inspiration

- **Indonesia**
  - Video games: 10%
  - Movies: 23%
  - Drama series: 13%

- **Thailand**
  - AI chatbots: 3%

- **India**
  - Consulting a travel agent: 18%

- **Japan**
  - Travel-related groups/channels: 11%

Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023
Before travelers seal the deal, they go the extra mile

Amidst abundant options and information sources, travelers are particularly conscious about making confident decisions, and they’re willing to invest extra effort to achieve that assurance.

They need more confidence
In China 78% need to be very confident in having made the best decision.

They don’t trust what they see
In Thailand 46% felt it was hard to find relatable information.

They fact-check it all
In India 67% used other sources to fact-check information.

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Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023
And unexpectedly, along that journey, we see a remarkable flip. 52% of surveyed APAC travelers altered their destination, flight, or accommodation choices during their planning process. The percentage varied across countries:

- Australia: 35%
- China: 53%
- India: 78%
- Indonesia: 65%
- Japan: 19%
- South Korea: 38%
- Thailand: 79%

Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023
What’s fueling the change? FOMO for a more attractive option or offer

- **12%** changed their choice of airline
  - Reasons:
    - Wanted a lower-priced flight option 43%
    - Another airline’s offerings were more attractive 41%
    - Changed their intended travel location so they had to change flight options 36%

- **21%** changed their accommodation
  - Reasons:
    - Inspired by another accommodation’s offerings 42%
    - Accommodation’s offerings were not attractive enough 37%
    - Wanted a lower-priced accommodation option 36%

35% changed their destination
  - Reasons:
    - Inspired by a new place to travel 42%
    - Wanted to travel to a more budget-friendly location 35%
    - It was not the best season for travel to the original destination 29%

Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023
But as their research increases, so does their confidence and likelihood to repurchase

Travelers who are satisfied with their search experience are:

- more likely to be very confident in their booking decision
- more likely to have strong intent to rebook with the same airline / accommodation brand again

Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023. Based on Top-box score comparison between the two traveler groups with different satisfaction levels of information search experience.
How can travel brands meet these needs?

1. Inspire

Meet travelers halfway by providing them with the inspiration and information they seek.

2. Inform
Catch them in peak moments of inspiration on immersive formats like YouTube Shorts.

70B daily views globally
2B logged in users monthly

Source: YouTube Internal Data, Jun 2023, May 2023
In India and South Korea, YouTube Shorts is the short video platform used as a source of travel inspiration.

Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023
Use the power of Google AI-powered ad solutions to spark inspiration... …no matter what path a traveler takes
Video Action Campaigns are designed to drive consideration with the power of video

Add a vertical creative asset to your campaign to seamlessly reach audiences on YouTube Shorts

Adding a vertical creative asset to your Video Action Campaign delivered

10 - 20% more conversions per dollar on YouTube Shorts than using landscape assets alone.

Source: YouTube Internal Data, Global, May-June 2022
Hotel and vacation rental advertisers can now try Hotel Feeds on Video Action Campaigns, which allows you to display a selection of your properties below your video ad in the form of a scrollable grid of listings.
Demand Gen
a new launched campaign

is built to help advertisers who buy on social platforms spur action in the right moment.

With a combination of video and image ads now in a single campaign, use Demand Gen to reach travelers across the Discover feed, Gmail, YouTube Feeds, YouTube in-stream and YouTube Shorts.
Beyond inspiration, show up for travelers in the moments they need information.

As travelers search more diligently before making their travel decisions, use the power pairing of Search and Performance Max campaigns to maximize conversions on relevant queries.
Hotel advertisers can make sure they’re appearing in the most beneficial spots at right moments in the decision process by using Hotel Campaigns.
Looking for more travel insights?

- Google trends
- Destination insights
- Hotel insights
Think with Google