Amadeus Journey of Me Insights

What Asia Pacific travellers want
(Australia report)

Sample size: 500
Amadeus Asia Pacific
CONTENT

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

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

- Australia (500 respondents),
- China (1,200),
- Hong Kong (300),
- India (1,200),
- Indonesia (500),
- Japan (420),
- Korea (400),
- Malaysia (400),
- New Zealand (250),
- Philippines (400),
- Singapore (300),
- Taiwan (300),
- Thailand (400),
- Vietnam (300).
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.
64% of Asia Pacific travellers would be willing to trade personal data for more relevant offers and personalised experiences – a figure almost matched by Australians (62%). But it must be carefully balanced against rising privacy concerns. Some boundaries must be maintained and at all times travel providers must respect and protect personal data and the need for privacy. And above and beyond adhering to legislation, travel players must be able to articulate ‘what’s the value?’ to get travellers to share their data.

Rather than the glossy pictures of travel brochures or the carefully curated Instagram feeds of celebrities, Australian travellers seek what’s genuine, and turn to their fellow travellers for inspiration. The research found that traveller reviews on online booking sites have the largest influence on Australian travellers’ trip planning.

In the world of travel, every engagement point matters. Beyond personalisation, connecting with travellers in a timely and intuitive manner is equally important. The good news is that the vast majority of Australian 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. Interestingly only 8% want to receive these recommendations via a messaging service compared to 20% for the Asia Pacific traveler.

The right content, through the right channel, at the right time
SO WHAT DO AUSTRALIAN TRAVELLERS WANT?

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

INSPIRE ME about the endless possibilities around travel and technology

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

CARE FOR ME and keep me safe and secure

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

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

Journey of Me
**KNOW ME**

_ Personalisation or privacy?_ 64% of APAC travellers are open to sharing personal information with travel service providers for more relevant offers and personalised services, with Australians very similar at 62%. Indonesians are the most open (80%) group but Japanese travellers prefer privacy – 69% of them are not open to sharing their data.

_ Big screens vs small screens:_ Australia has much lower usage of mobile phones for research (33%) and booking (20%) as compared to APAC travellers in general (54%; 46%). Business travellers however, are more likely to book trips on mobile (37%) than leisure travellers (15%).

_ Recommendations that matter:_ Recommendations that help save money are more important to Australians (44%) than then average APAC traveller (37%). This is particularly more important to baby boomers than to younger age groups. This is interesting as for many other markets the opposite trend is observed.

_ Who knows better:_ 49% of Australian travellers say they have received relevant travel recommendations from travel review sites, but very few have received the same from other platforms. More females (17%) than males (10%) say none of the listed platforms have sent them relevant travel recommendations.

**INSPIRE ME**

_ Opportunities to inspire:_ In Australia, travellers tend to plan their trips during the weekends, especially those who mostly travel for leisure. Those that travel mostly for business are more likely to plan travel while at work (34%) than those who travel for leisure (9%).

_ The influencers:_ Compared to Asia Pacific as a whole, Australian travellers are most heavily influenced by traveller reviews and online booking or travel sites and least influenced by Social Media.

_ New technology:_ An augmented reality mobile app that delivers digital overlays containing interactive information about the culture or history of a tourist site interests APAC travellers the most compared to other new technologies listed, but interestingly it is the least popular for Australians. Travellers from Australia demonstrated a higher interest in 360 degree interactive videos.
Reasons to stay connected: Only 19% of Australians think it is important to stay connected while travelling in order to ‘stay updated with work/business’ (the APAC average is 32%). 6% prefer to disconnect completely – higher than the APAC average of 2% who want the same. Australian female travellers are more likely to want to stay connected to share pictures and experiences from the trip (50%), compared to males (34%).

How to get connected: Most respondents from Australia use Wi-Fi (78%) to stay connected when they are travelling abroad. Only 17% of them use hotel-provided smartphone devices with free data and local calls (e.g. Handy) and just 33% of them use international roam-as-you-go services, both lower than the regional averages (36%, 22%).

Apps that add value: Trip Advisor (19%), Facebook (11%) and Google Maps (10%) are the top three mobile apps that travellers use while on their trips. Interestingly, about half (49%) of respondents from Australia do not use any of the listed apps while travelling.

A good time to ‘talk’: While Australian travellers are very open to receiving recommendations throughout the entire travel journey, there is a decline in interest for receiving travel-based recommendations as the trip progresses, falling from a high of 90% when travellers are first considering taking a trip, to a low of 42% once they have finished the trip.

“You can reach me via...”: E-mail, say 35% of APAC respondents, which is the most popular channel compared to messaging services, travel company apps, social media or phone calls. Respondents in Australia (62%) very strongly favour this channel, a less-intrusive form of communication. Only 8% want to receive these via messaging service (compared to 20% for APAC).
Speak my language: The large majority of Australians say it is important to find service staff (70%) and tour guides (68%) at the destination who speak a language they understand. This level of demand is much higher than the regional averages of 47% and 46% respectively.

New world, new options: Australians are less likely than their fellow APAC travellers to jump on the sharing economy bandwagon for travel. 49% of Australians say they have never used sharing economy transport apps like Uber, Grab, Lyft etc. to get around during trips. Likewise 47% have never used sharing economy accommodation apps like Airbnb, Couch Surfing etc.

Great expectations: Only 6% of Australian female travellers say that a travel agent has impressed them and exceeded their expectations, compared to 15% of male travellers. Millennials more likely to say an airline has impressed them. Gen X and Baby boomers however, are more likely to say hotel or accommodation provider.

Travel stoppers: For all adverse events listed, Australians across the board are less likely than the average APAC traveller to be put off from travelling. Recent terror attacks are most likely to impact their travel with one in two Australians being very unlikely to travel to a destination that has had a recent terror attack.

Safety updates: Australian respondents prefer to receive safety or security updates from their embassy or government (54%) and transport providers (e.g. airline, train line, bus company) (47%). 46% of travellers also prefer to receive updates from immigration or border security, which is higher than the regional average (36%).
Demographic overview

Who we surveyed
DEMOGRAPHIC OVERVIEW
A snapshot of Australian travellers surveyed

**Gender**
- Male: 58%
- Female: 42%

**Age**
- 18 to 24: 7%
- 25 to 34: 28%
- 35 to 44: 23%
- 45 to 54: 14%
- 55+: 28%

**Travel frequency**
- 1 to 2 trips in the last 12 months: 60%
- 3 to 7 trips in the last 12 months: 35%
- 8 to 12 trips in the last 12 months: 4%
- 13 trips or more in the last 12 months: 1%

**Primary reason for travel**
- Business: 14%
- Leisure: 82%
- Other: 4%
Know Me
and what I want, before I even want it
Q1. When it comes to researching your trip and making a booking, which device(s) do you use most? Select all that apply.

Most respondents research their trips (81%) and make bookings (81%) on laptops or desktop computers, followed by mobile phone (33%, 20%). Australia has a much lower usage of mobile phones for research (33%) and booking (20%) a trip as compared to APAC travellers in general (54%; 46%).

<table>
<thead>
<tr>
<th>Device Type</th>
<th>Trip Research</th>
<th>Trip Booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Laptop/desktop computer</td>
<td>81%</td>
<td>81%</td>
</tr>
<tr>
<td>Mobile phone</td>
<td>33%</td>
<td>20%</td>
</tr>
<tr>
<td>Tablet</td>
<td>21%</td>
<td>16%</td>
</tr>
<tr>
<td>I get someone else to do it for me (e.g. a travel agency)</td>
<td>8%</td>
<td>12%</td>
</tr>
</tbody>
</table>

APAC and Australia statistics are shown in the diagram.
(continued) Q1. When it comes to researching your trip and making a booking, which device(s) do you use most?

Business travellers however, are more likely to book trips on mobile (37%) than leisure travellers (15%). Only 4% do most of their trip research with a travel agency.
Q2. When do you usually book your accommodation for a trip?

37% of respondents book their accommodation for a trip at the same time as booking their flight or transport. Only 2% of Australians would leave booking accommodation until after landing, a finding matched by the APAC average.

When do travellers book accommodation

- In advance of booking the flight/transport: 35% (APAC), 31% (Australia)
- At the same time when I’m booking the flight/transport: 36% (APAC), 37% (Australia)
- After booking the flight/transport, but before departure: 27% (APAC), 30% (Australia)
- After landing or reaching the destination: 2% (APAC), 2% (Australia)
(Continued) Q2. When do you usually book your accommodation for a trip?

Australian female travellers are generally more likely to book accommodation at the same time as or after booking the flight/transport, compared to their male counterparts. Business travellers are more likely to book accommodation before they book the flight (47%), compared to leisure travellers (27%).
Q3. When you travel for leisure, what types of travel recommendations do you find most useful? Please select the top two.

Recommendations that help save money are more important to Australians (44%) compared to the average APAC traveller (37%). In particular, this is more important to baby boomers than to younger age groups. This is interesting as for many other markets the opposite trend is observed.

Most useful recommendations for leisure travel

- **Recommendations that help me save money**: 44% (Australians), 37% (APAC)
- **Recommendations that make my travel more comfortable**: 29% (Australians), 22% (APAC)
- **Recommendations that help me save time**: 28% (Australians), 22% (APAC)
- **Recommendations that help me identify the best sightseeing options**: 27% (Australians), 22% (APAC)
- **Recommendations that ensure my safety**: 27% (Australians), 22% (APAC)
- **Recommendations that help me plan my itinerary**: 25% (Australians), 20% (APAC)
- **Recommendations that expose me to new experiences**: 26% (Australians), 22% (APAC)
- Other, please specify: 1% (Australians), 0% (APAC)

By age group

- **18-35 (Millennials)**: Recommendations that help me save money - 39% (Australians), 37% (APAC)
- **36-51 (Generation X)**: Recommendations that help me save money - 43% (Australians), 39% (APAC)
- **52-70 (Baby boomers)**: Recommendations that help me save money - 53% (Australians), 44% (APAC)

© Amadeus IT Group and its affiliates and subsidiaries
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

One in two (49%) Australian travellers say they have received relevant travel recommendations from travel review sites, but very few have received the same from other platforms. Only 34% and 24% received relevant information from social networks (e.g. Friends/family) and travel blogs/forums, lower than the regional averages (48%, 34%).

Platforms that have sent travellers relevant travel recommendations

- Airline website or app (e.g. Singaporeair.com, Koreanair.com, Emirates.com): 29% (APAC), 26% (Australia)
- Hotel website or app: 27% (APAC), 34% (Australia)
- Travel agency: 26% (APAC), 32% (Australia)
- Online booking websites (e.g. Expedia, Goibibo, Skyscanner, kayak): 43% (APAC), 50% (Australia)
- Hotel concierge: 15% (APAC), 14% (Australia)
- Airline in-flight magazine: 18% (APAC), 18% (Australia)
- Social network e.g. Friends/family: 18% (APAC), 18% (Australia)
- Travel review site (e.g. TripAdvisor): 43% (APAC), 47% (Australia)
- Travel blogs/forums: 24% (APAC), 34% (Australia)
- None of the above: 4% (APAC), 13% (Australia)
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.

More females (17%) than males (10%) say none of the listed platforms have sent them relevant travel recommendations. Also, only 17% of female travellers picked travel agency compared to 32% males.
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?

62% of the respondents are open to sharing personal information with travel service providers. Business travellers are slightly less open to sharing personal information than leisure travellers. Frequent travellers more likely to be open to sharing personal information (78%).

Openness to sharing personal information with travel providers

- Not at all open: 8% (APAC), 13% (Australia)
- Somewhat not open: 13% (APAC), 28% (Australia)
- Somewhat open: 49% (APAC), 48% (Australia)
- Very open: 15% (APAC), 14% (Australia)

By travel type

- Not at all open: 17% (For business), 12% (For leisure)
- Somewhat not open: 24% (For business), 25% (For leisure)
- Somewhat open: 30% (For business), 53% (For leisure)
- Very open: 10% (For business), 29% (For leisure)

By travel frequency

- Not at all open: 9% (1-2 trips in the last 12 months), 0% (3-7 trips in the last 12 months), 16% (8 trips or more in the last 12 months)
- Somewhat not open: 24% (1-2 trips in the last 12 months), 25% (3-7 trips in the last 12 months), 22% (8 trips or more in the last 12 months)
- Somewhat open: 48% (1-2 trips in the last 12 months), 48% (3-7 trips in the last 12 months), 61% (8 trips or more in the last 12 months)
- Very open: 12% (1-2 trips in the last 12 months), 18% (3-7 trips in the last 12 months), 17% (8 trips or more in the last 12 months)
Inspire Me
about the endless possibilities around travel and technology
Q6. When do you do most of your travel planning?

Only 12% of Australian travellers choose to do most of their travel planning while on holiday (vs 25% for APAC in total). Most of them (39%) do it over the weekends, especially travellers who travel mostly for leisure.
Q6. When do you do most of your travel planning?

Travellers that travel mostly for business naturally do most of their travel planning at work during work hours (34%). Leisure travellers however, are far less likely to plan travel at work (9%) and most likely to do so during the weekends (42%).
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.

Compared to APAC as a whole, Australian travellers are more heavily influenced by traveller reviews (1.3 vs 1.0), and less heavily influenced by social media (0.3 vs 0.6).

Sources that influence travellers’ trip planning:

- Travel blogs or forums: 0.6
- Traveller reviews (e.g. on sites like TripAdvisor): 1.0
- Social media (General or sponsored content on Facebook, Twitter, Instagram etc.): 0.6
- Brochures (from hotel reception, travel desks, airports etc.): 0.3
- Travel agents: 0.5
- Online booking or travel sites (Expedia, Skyscanner etc.): 1.3
- Friends/family/colleagues (word of mouth or through social media): 1.0
- Travel Guides (e.g. Lonely Planet, Discovery): 0.6
- Celebrities or social media influencers: 0.1
Q8. Rank the following new technologies from highest to lowest, based on your interest in using them for planning or while on a trip.

An augmented reality mobile app that delivers digital overlays containing interactive information about the culture or history of a tourist site (score 1.4 out of 3) interests APAC travellers the most compared to other new technologies listed, however is the least popular for Australians (score 0.9 out of 3). Travellers from Australia demonstrated a higher interest in 360 degree interactive videos.

Sample size: 500

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

*Interested percentage
Connect Me
so I can stay in touch with what’s important to me
Q9. Why do you want to stay connected when you travel?

Only 19% of Australians think it is important to stay connected while travelling in order to ‘stay updated with work/business’ (the APAC average is 32%). 6% prefer to disconnect completely – higher than only 2% of APAC travellers who want the same. Australian female travellers are more likely to want to stay connected to share pictures and experiences from the trip (50%), compared to males (34%).

### Why travellers want to stay connected when travelling

- Keep up to date with what is happening in the world: 49% (APAC), 51% (Australia)
- Stay updated with work/business: 32% (APAC), 48% (Australia)
- Share pictures and experiences from my travels with friends and family: 54% (APAC), 46% (Australia)
- Meet new people using travel and social apps: 40% (APAC), 52% (Australia)
- Use convenience apps like Uber, Foodpanda, Grab, Deliveroo, Zomato etc.: 34% (APAC), 51% (Australia)
- Research things to do at the destination: 49% (APAC), 52% (Australia)
- Translate local language: 52% (APAC), 58% (Australia)
- Access maps and location information: 54% (APAC), 58% (Australia)
- Let people know I’m safe: 53% (APAC), 57% (Australia)
- Other, please specify: 0% (APAC), 0% (Australia)
- I prefer to disconnect completely when I travel: 6% (APAC), 6% (Australia)

### By gender

- Male: Keep up to date with what is happening in the world - 51%, Stay updated with work/business - 17%, Share pictures and experiences from my travels with friends and family - 31%, Meet new people using travel and social apps - 20%, Use convenience apps like Uber, Foodpanda, Grab, Deliveroo, Zomato etc. - 24%, Research things to do at the destination - 49%, Translate local language - 28%, Access maps and location information - 51%, Let people know I’m safe - 48%, Other, please specify - 58%
- Female: Keep up to date with what is happening in the world - 46%, Stay updated with work/business - 34%, Share pictures and experiences from my travels with friends and family - 50%, Meet new people using travel and social apps - 34%, Use convenience apps like Uber, Foodpanda, Grab, Deliveroo, Zomato etc. - 50%, Research things to do at the destination - 57%, Translate local language - 58%, Access maps and location information - 58%, Let people know I’m safe - 58%, Other, please specify - 58%
Q10. How do you choose to stay connected when you are travelling abroad? Select all that apply

Most respondents from Australia use Wi-Fi (78%) to stay connected when they are travelling abroad. Only 17% of them use hotel-provided smartphone devices with free data and local calls (e.g. Handy) and just 22% of them use international roam-as-you-go services, both lower than the regional averages (36%, 22%).

How travellers choose to stay connected when travelling abroad

- Wi-Fi: 78% (71% APAC)
- International roam-as-you-go services: 22% (33% APAC)
- Local sim card purchased at the destination: 36% (43% APAC)
- International phone/data package purchased before leaving my home country: 28% (36% APAC)
- Hotel-provided smartphone devices with free data and local calls (e.g. Handy): 17% (36% APAC)
- Mobile phone calls for emergencies only: 25% (27% APAC)
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’

Trip Advisor (19%), Facebook (11%) and Google Maps (10%) are the top three mobile apps that travellers use while on their trips. Interestingly, about half (49%) of respondents from Australia do not use any of the listed apps while travelling.
Talk to Me
throughout the entire journey, but on my terms
Q12. How interested are you in receiving travel-based recommendations (e.g. things to do, places to visit or eat etc.) in the following stages of your travel?

While Australian travellers are very open to receiving recommendations throughout the entire travel journey, there is a decline in interest for receiving travel-based recommendations as the trip progresses, falling from a high of 90% when travellers are first considering taking a trip, to a low of 42% once they have finished the trip. Millennials are generally more open to receiving recommendations across every stage of travel.

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

62% of Australians prefer recommendations and updates about their trip to reach them via e-mail, double the number for APAC travellers in general (35%). Only 8% want to receive these via messaging service (compared to 20% for APAC).
Delight Me
and bring the magic back into travel, every step of the way
Q14. How often do you use the following apps or services?

Australians are less likely than their fellow APAC travellers to jump on the sharing economy bandwagon for travel. 49% of Australians say they have never used sharing economy transport services/apps like Uber, Grab, Lyft etc. to get around during trips, compared to only 25% of APAC travellers who have never used these. Likewise 47% have never used sharing economy accommodation services/apps like Airbnb, Couch Surfing etc. (compared to 32% regional).

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

<table>
<thead>
<tr>
<th>Frequency</th>
<th>APAC</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>25%</td>
<td>49%</td>
</tr>
<tr>
<td>Seldom</td>
<td>25%</td>
<td>39%</td>
</tr>
<tr>
<td>Often</td>
<td>27%</td>
<td>19%</td>
</tr>
<tr>
<td>Very Often</td>
<td>10%</td>
<td>6%</td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Frequency</th>
<th>APAC</th>
<th>Australia</th>
</tr>
</thead>
<tbody>
<tr>
<td>Never</td>
<td>32%</td>
<td>47%</td>
</tr>
<tr>
<td>Seldom</td>
<td>26%</td>
<td>39%</td>
</tr>
<tr>
<td>Often</td>
<td>22%</td>
<td>19%</td>
</tr>
<tr>
<td>Very Often</td>
<td>7%</td>
<td>7%</td>
</tr>
</tbody>
</table>
As expected, millennials are the most likely age group to have used sharing economy apps, with cost saving and convenience being the top reasons for using them. 44% have used ridesharing apps (compared to Gen X: 25% and Baby boomers: 4%), while 44% have used apps for accommodation services (Gen X: 25%; Baby boomers 6%).

Interestingly, business travellers are significantly more likely to use sharing economy apps than leisure travellers, with 46% using them for transport apps and 50% for accommodation services. 47% of business travellers choose sharing economy apps for accommodation during their trips as it is a ‘more flexible solution’.

By age

<table>
<thead>
<tr>
<th>Age Group</th>
<th>Ridesharing Apps</th>
<th>Accommodation Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>18-35 (Millennials)</td>
<td>44%</td>
<td>44%</td>
</tr>
<tr>
<td>36-51 (Generation X)</td>
<td>25%</td>
<td>25%</td>
</tr>
<tr>
<td>52-70 (Baby boomers)</td>
<td>4%</td>
<td>6%</td>
</tr>
</tbody>
</table>

By travel type

<table>
<thead>
<tr>
<th>Travel Type</th>
<th>Ridesharing Apps</th>
<th>Accommodation Apps</th>
</tr>
</thead>
<tbody>
<tr>
<td>For business</td>
<td>46%</td>
<td>50%</td>
</tr>
<tr>
<td>For leisure</td>
<td>20%</td>
<td>21%</td>
</tr>
</tbody>
</table>
Q15. Why did you choose to use these sharing economy services and apps? Select all that apply

For all markets, including Australia, ease of use and cost saving are the top reasons for using sharing economy apps, both for getting around during trips as well as for accommodation.

**Reasons for using apps to get around during trips**

- **Cost saving**: 43% (APAC), 45% (Australia)
- **Better quality/service**: 36% (APAC), 38% (Australia)
- **Better safety/security**: 27% (APAC), 34% (Australia)
- **More flexible solution**: 37% (APAC), 32% (Australia)
- **Easy to use/convenient**: 60% (APAC), 47% (Australia)
- **More local experience**: 20% (APAC), 25% (Australia)

**Reasons for using services/apps for stays during trips**

- **Cost saving**: 46% (APAC), 48% (Australia)
- **Better quality/service**: 28% (APAC), 34% (Australia)
- **Better safety/security**: 22% (APAC), 29% (Australia)
- **More flexible solution**: 36% (APAC), 35% (Australia)
- **Easy to use/convenient**: 48% (APAC), 40% (Australia)
- **More local experience**: 27% (APAC), 32% (Australia)

Sample size: 255 (get around the trips), 263 (stays during trips)
Q16. When you travel, how important is it for you to find each of the following at your destination?

The large majority of Australians say it is important to find service staff (70%) and tour guides (68%) at the destination who speak a language they understand. This level of demand is much higher than the regional averages of 47% and 46% respectively. Interestingly, business travellers are more likely to seek food and beverage from their home country (53%) – while only 26% leisure travellers chose this. They are also significantly more likely to seek religious facilities (43%) at destination compared to leisure travellers (16%).

* Percentage of respondents choosing ‘Somewhat important’ and ‘Very important’ for each option is presented.
Q17. Based on your past travel experiences, which of the following travel service providers have impressed you and exceeded your expectations the most?

83% of Australian respondents stated that a travel provider had exceeded their expectations, with booking sites contributing the most among all travel service providers (25%).
Q17. Based on your past travel experiences, which of the following travel service providers have impressed you and exceeded your expectations the most?

Only 6% of Australian female travellers say that a travel agent has impressed them and exceeded their expectations, compared to 15% of male travellers. Millennials more likely to say an airline has impressed them. Gen X and Baby boomers however, are more likely to say hotel or accommodation provider.

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

By gender

<table>
<thead>
<tr>
<th>Service</th>
<th>Male</th>
<th>Female</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airlines</td>
<td>18%</td>
<td>18%</td>
</tr>
<tr>
<td>Hotel or other accommodation providers</td>
<td>20%</td>
<td>23%</td>
</tr>
<tr>
<td>Booking sites</td>
<td>23%</td>
<td>27%</td>
</tr>
<tr>
<td>Travel agent</td>
<td>15%</td>
<td>6%</td>
</tr>
<tr>
<td>Tour operators</td>
<td>7%</td>
<td>9%</td>
</tr>
<tr>
<td>A travel provider has never exceeded my expectations</td>
<td>17%</td>
<td>17%</td>
</tr>
</tbody>
</table>

By age

<table>
<thead>
<tr>
<th>Service</th>
<th>18-35 (Millennials)</th>
<th>36-51 (Generation X)</th>
<th>52-70 (Baby boomers)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Airlines</td>
<td>12%</td>
<td>17%</td>
<td>24%</td>
</tr>
<tr>
<td>Hotel or other accommodation providers</td>
<td>17%</td>
<td>24%</td>
<td>24%</td>
</tr>
<tr>
<td>Booking sites</td>
<td>21%</td>
<td>24%</td>
<td>29%</td>
</tr>
<tr>
<td>Travel agent</td>
<td>9%</td>
<td>8%</td>
<td>16%</td>
</tr>
<tr>
<td>Tour operators</td>
<td>6%</td>
<td>9%</td>
<td>11%</td>
</tr>
<tr>
<td>A travel provider has never exceeded my expectations</td>
<td>16%</td>
<td>13%</td>
<td>24%</td>
</tr>
</tbody>
</table>
Care for Me
and keep me safe and secure
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?

For all adverse events listed, Australians across the board are less likely than the average APAC traveller to be put off from travelling. Recent terror attacks (48%) are the most likely to impact their travel – i.e. one in two Australians would be very unlikely to travel or will not travel to a destination that has had a recent terror attack.

*CARE FOR ME*

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

© Amadeus IT Group and its affiliates and subsidiaries

41
(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?

Across the board, females are more likely than males to avoid travelling to a destination due to an adverse events. Business travellers are much less likely to be affected compared to leisure travellers.

* Percentage of respondents assigning score of 4-5 for each option is presented.
Q20. From whom would you prefer to receive safety or security updates at the destination? Select all the apply

Australian respondents prefer to receive safety or security updates from their embassy or government (54%) and transport providers (e.g. airline, train line, bus company) (47%). 46% of travellers also prefer to receive updates from immigration or border security, which is higher than the regional average (36%).
Thank you!