

Destination

U N K N O W N

Navigating APAC Consumers'
Fluid Travel Plans

October 2023

Think with Google



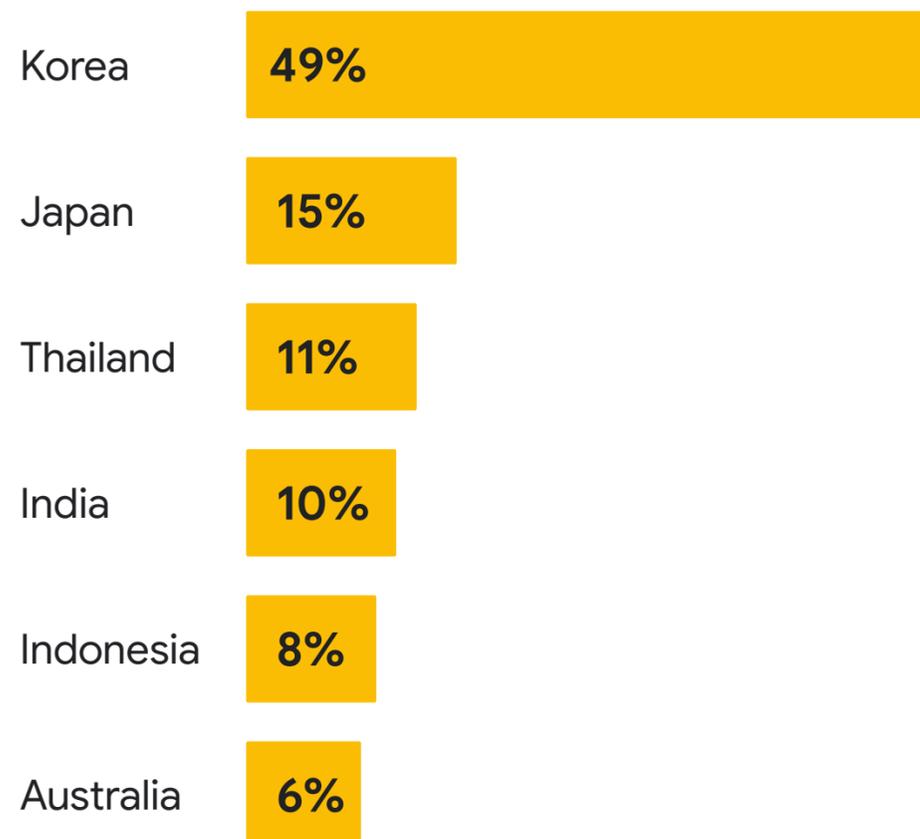
Travel momentum in APAC: Rising Interest with a dose of thoughtfulness

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.

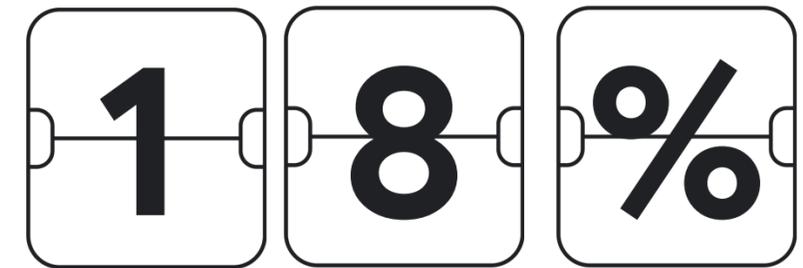
Source: Google Trends, Jan. 2023–Aug. 2023 vs. Jan. 2022–Aug. 2022.

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

YoY increase in search interest in the travel topic



Yet, quality trumps quantity



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

Recent explorers are twice as eager to embark on their next adventure

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

2 **X**

the number of trips as those who didn't travel recently*

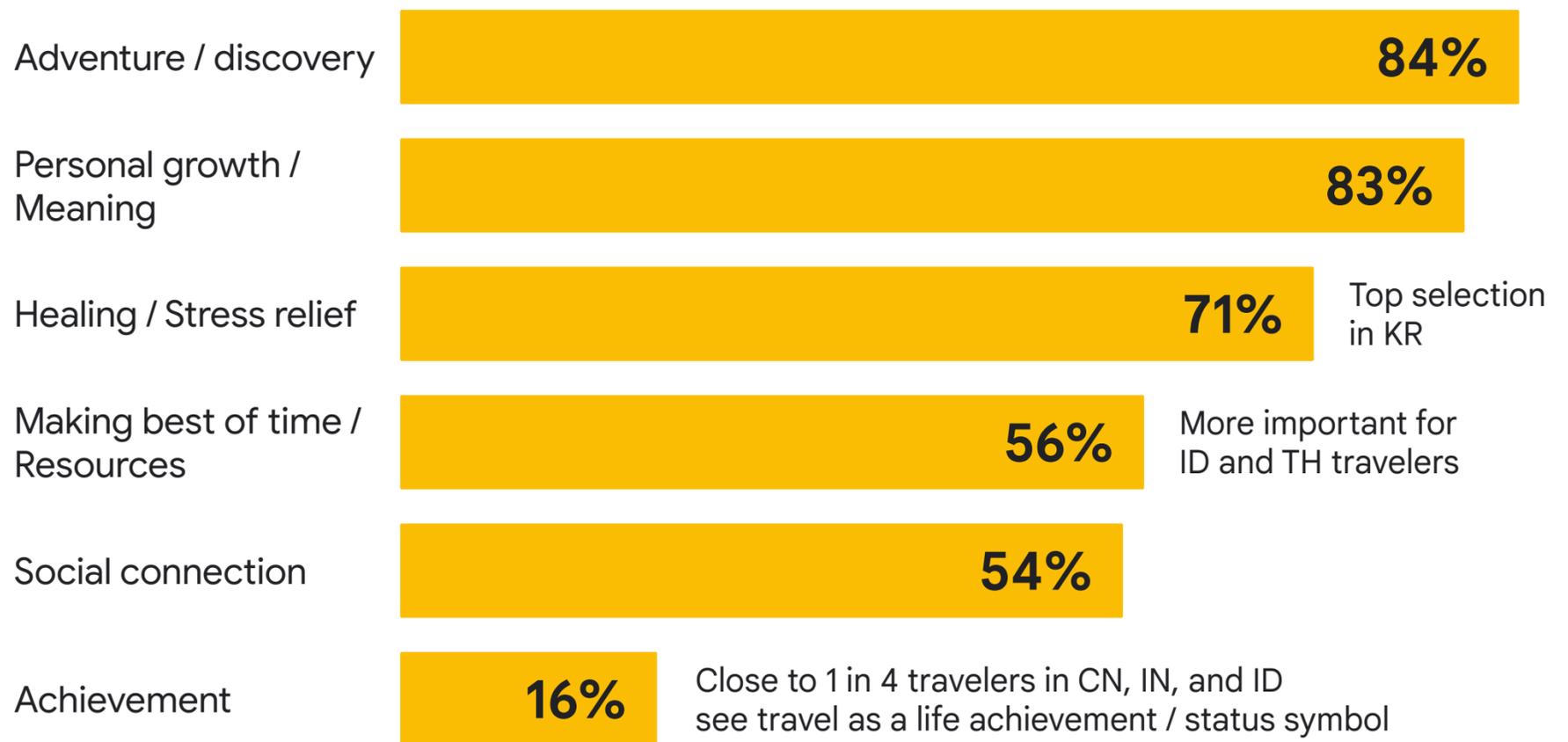
*In the last 12 months

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

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

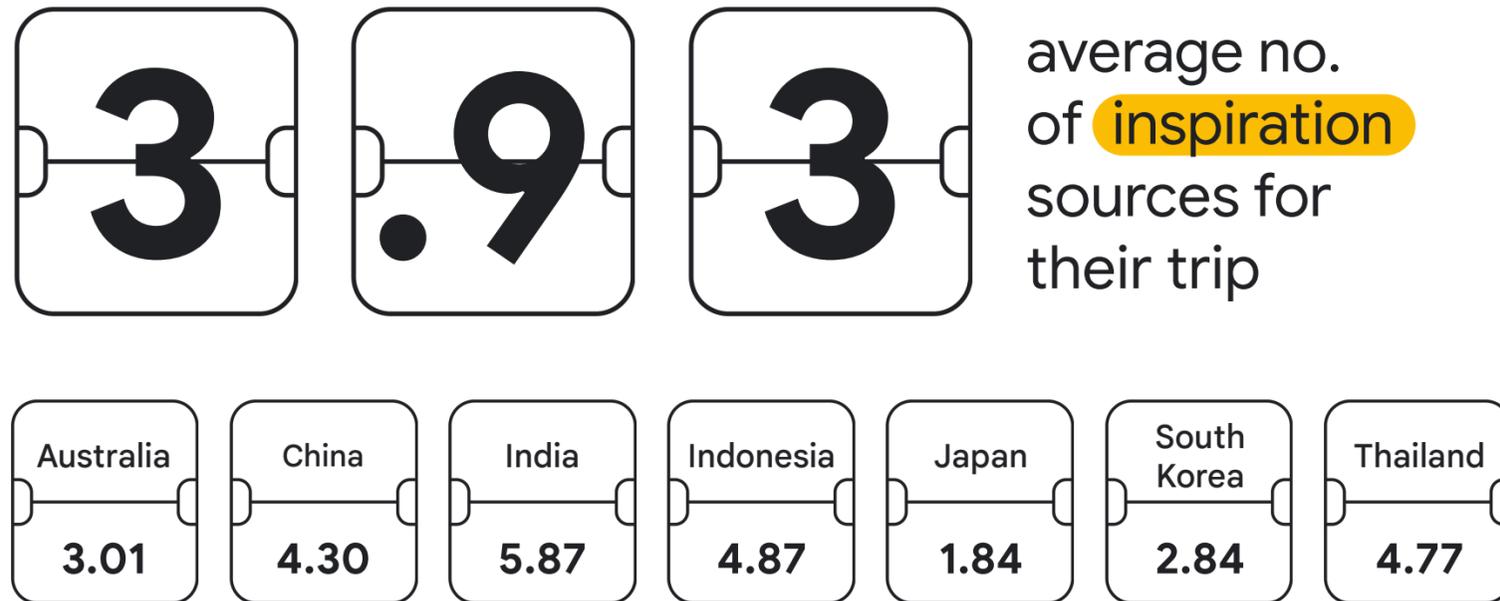


Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023

Inspire

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.



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.

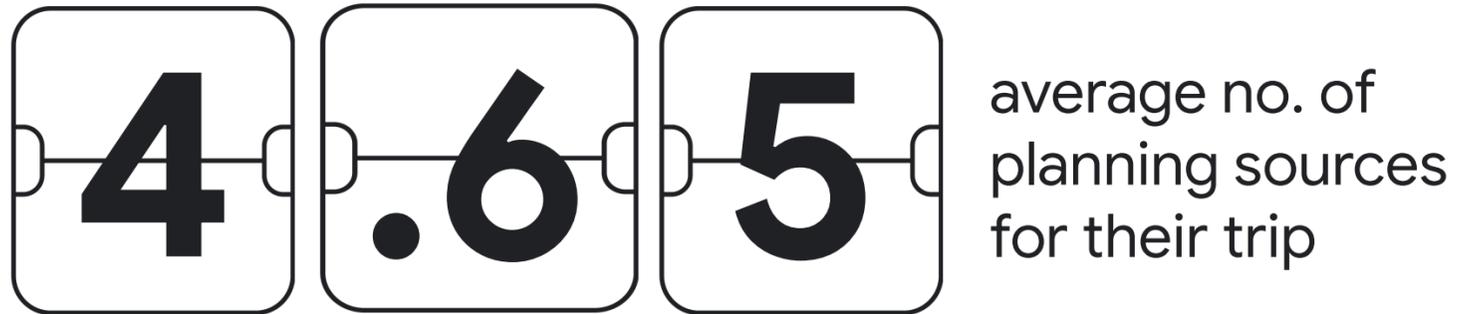
% of surveyed travelers listing a source as inspiration



Planning

Before travelers seal the deal, they go the extra mile

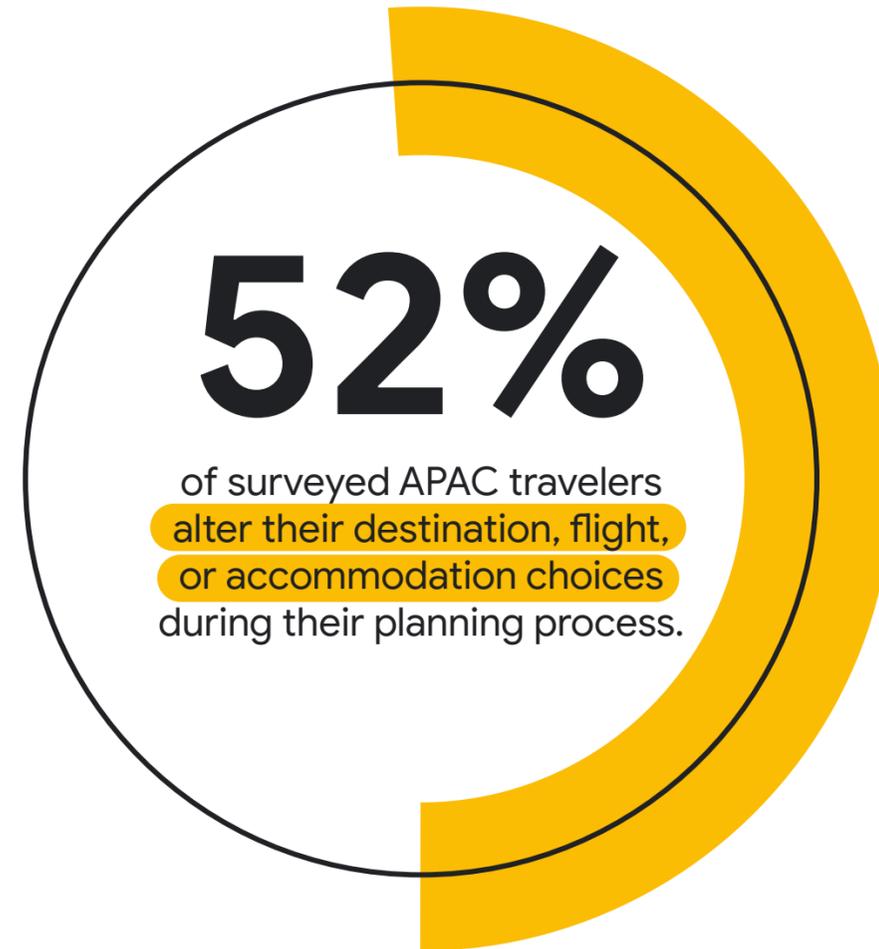
Amidst abundant options and information sources, travelers are particularly conscious about making confident decisions, and they're willing to invest extra effort to achieve that assurance.



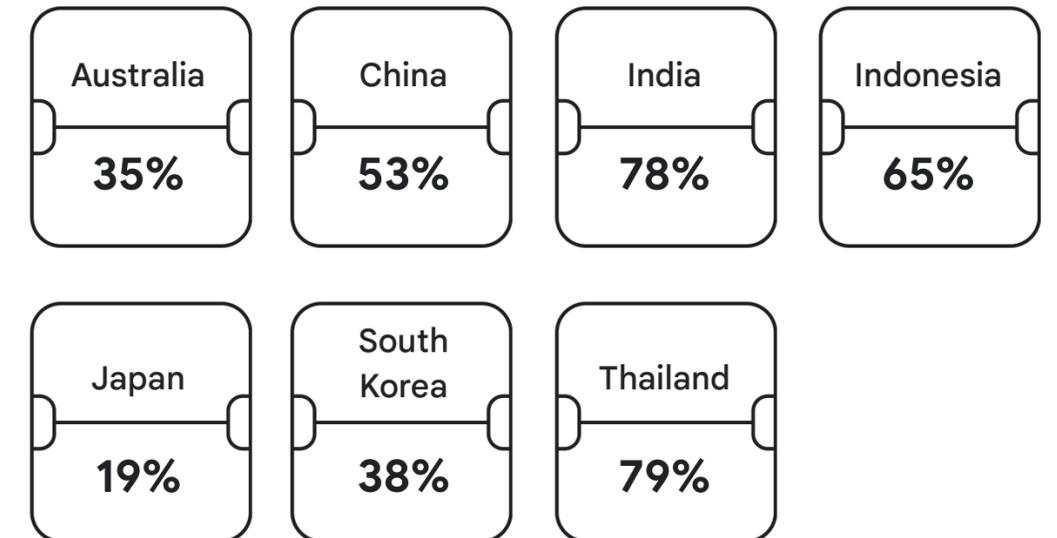
Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023

- 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

And unexpectedly, along that journey, we see a remarkable flip

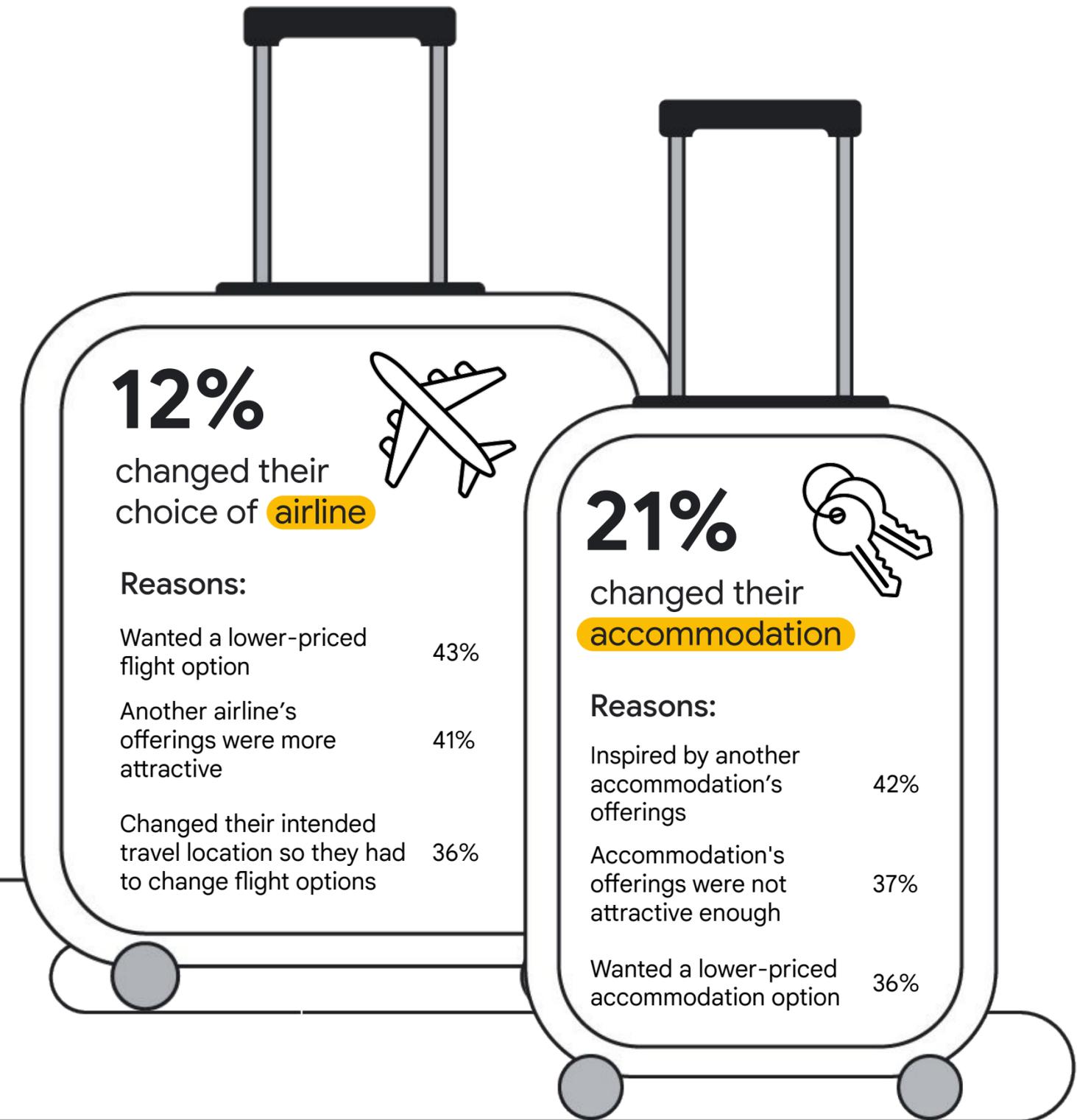


% made an eventual trip booking decision different from their original intention



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

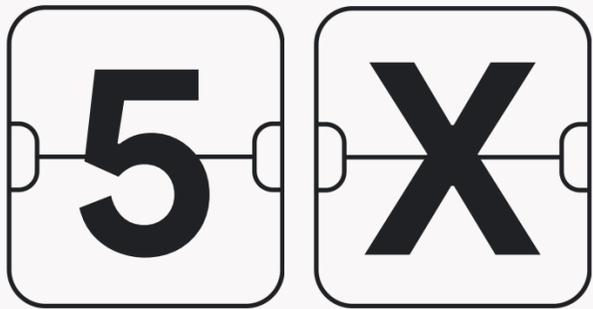
What's fueling the change? **FOMO** for a more attractive option or offer



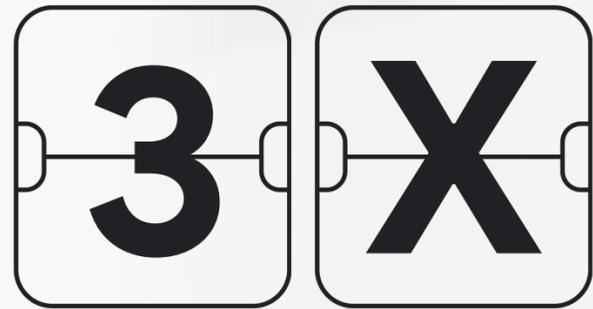
Source: Google/Ipsos, Travel Attitudes, Demand Research 2023, AU, CN, IN, ID, JP, KR, TH, n=19,000 consumers who have intention to travel for leisure in the next 12 months, May 2023–June 2023

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**?

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

1 Inspire

2 Inform

Inspire

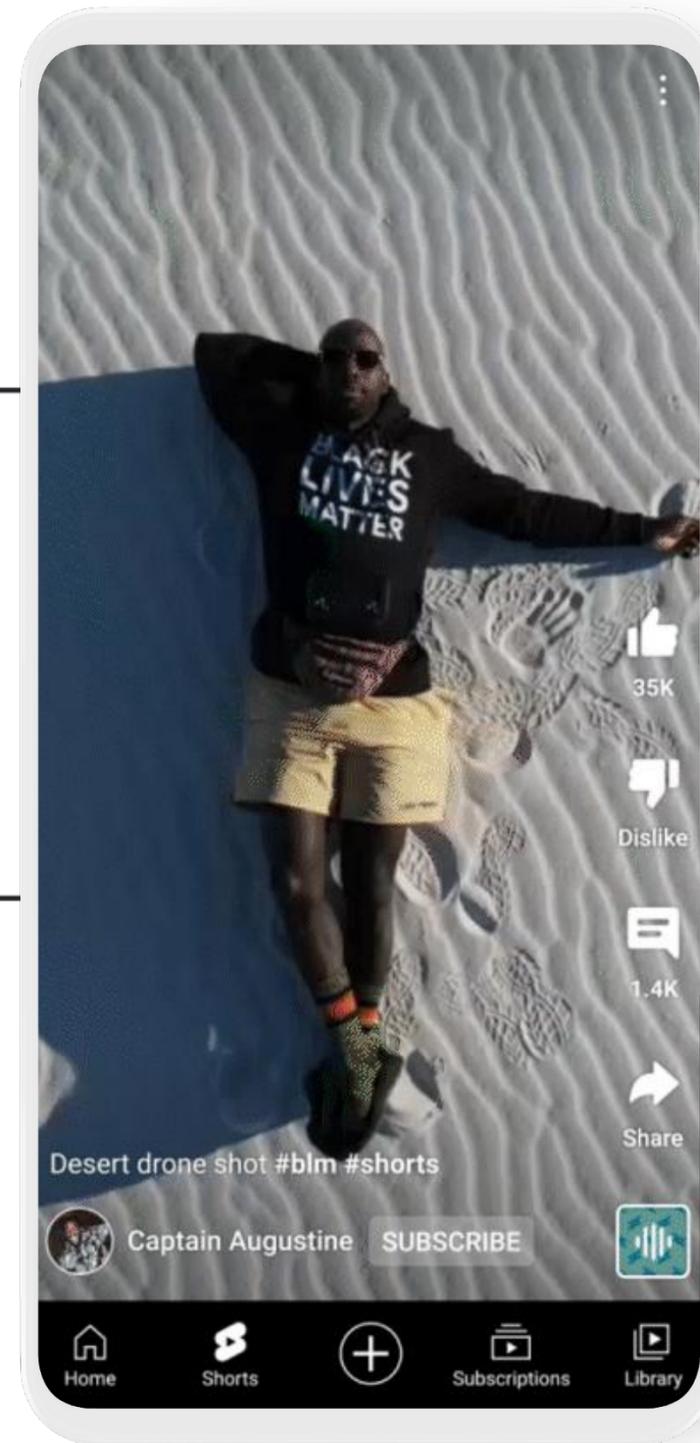
Catch them in peak moments of inspiration on immersive formats like YouTube Shorts

70B

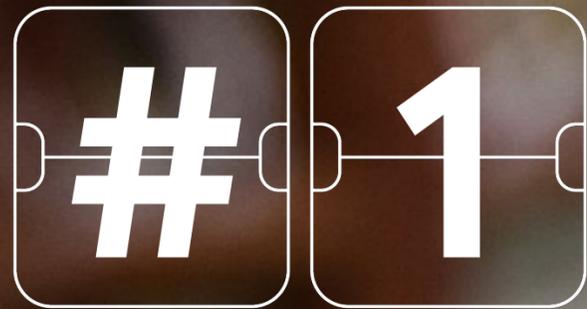
daily views globally

2B

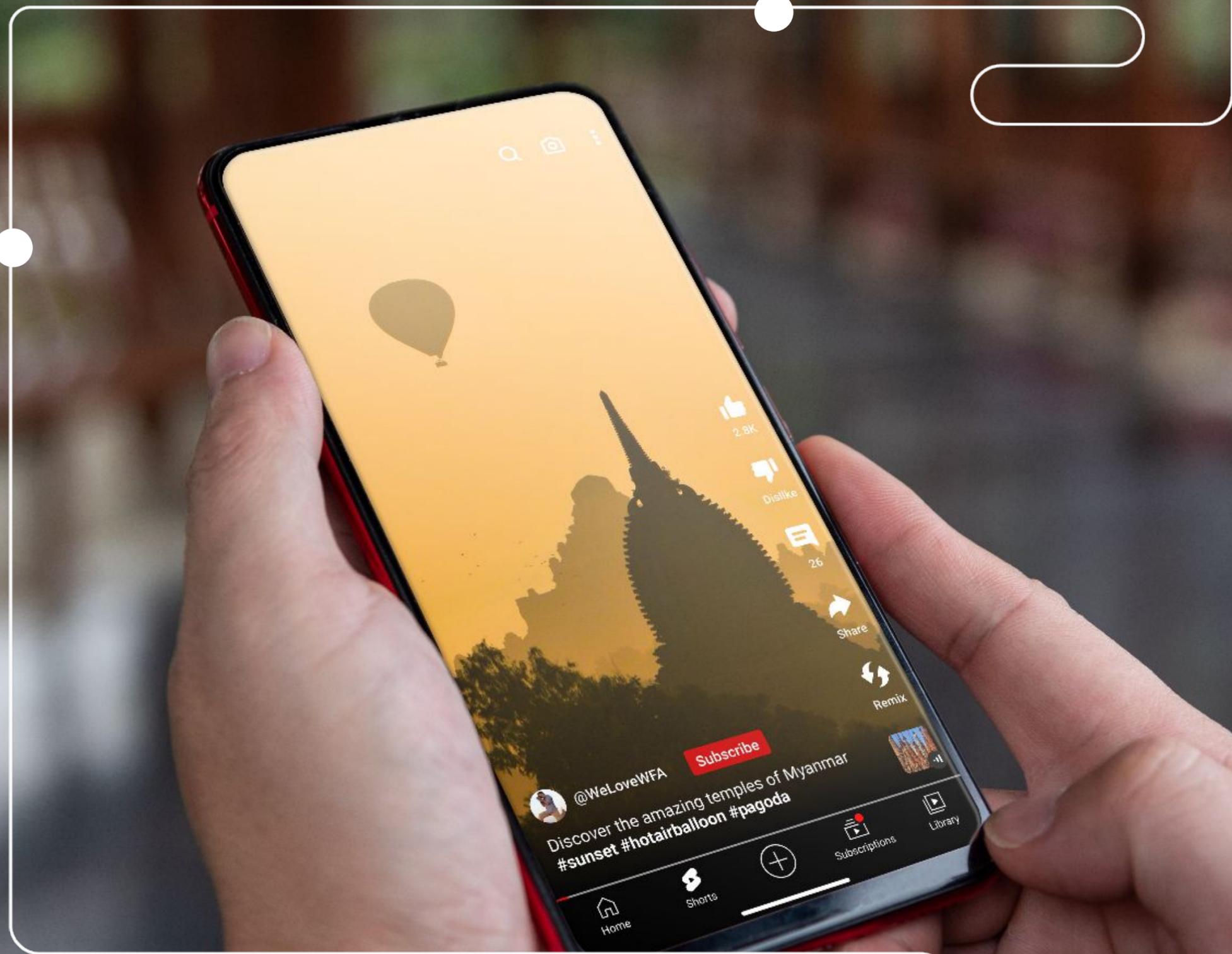
logged in users monthly



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

Think with Google

Inspire

Use the power of Google
AI-powered ad solutions
to spark inspiration...

...no matter what
path a traveler takes



Inspire

Video Action Campaigns are designed to drive consideration with the power of video

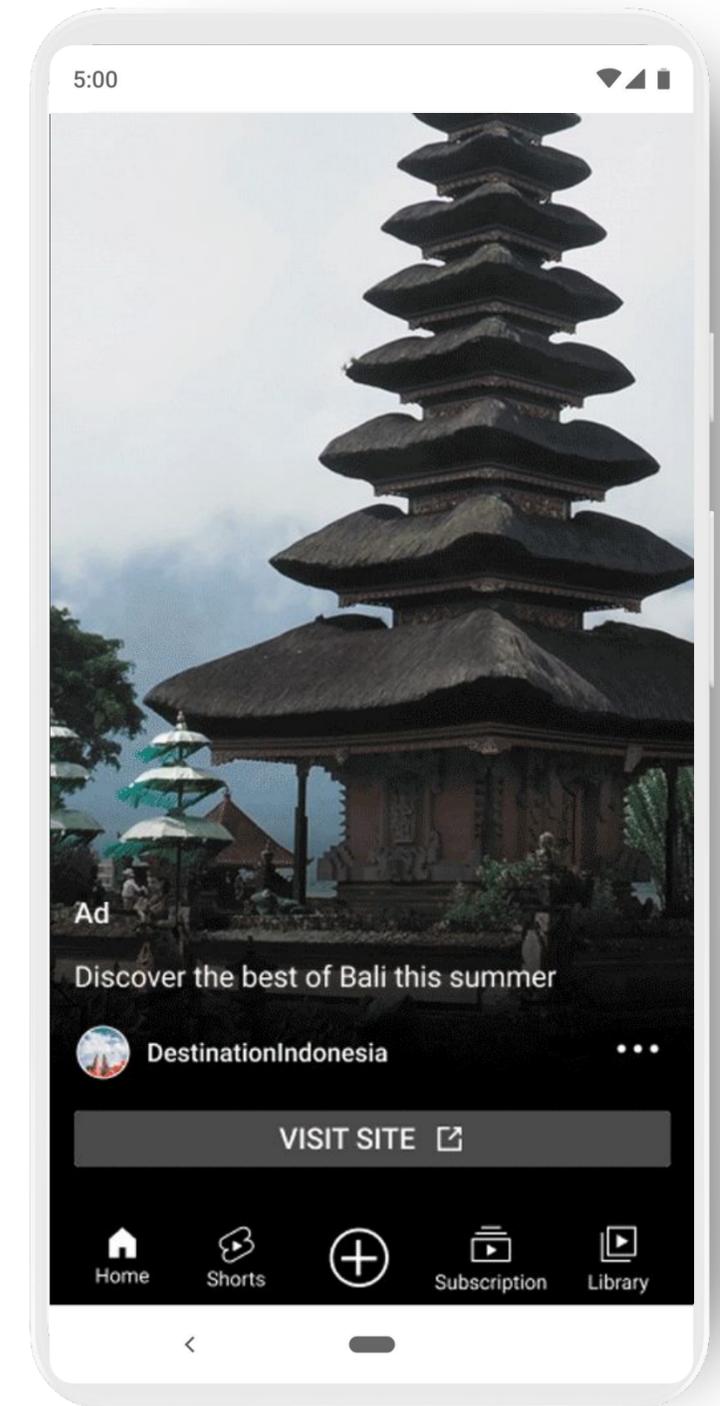
Add a vertical creative asset to your campaign to seamlessly reach audiences on YouTube Shorts

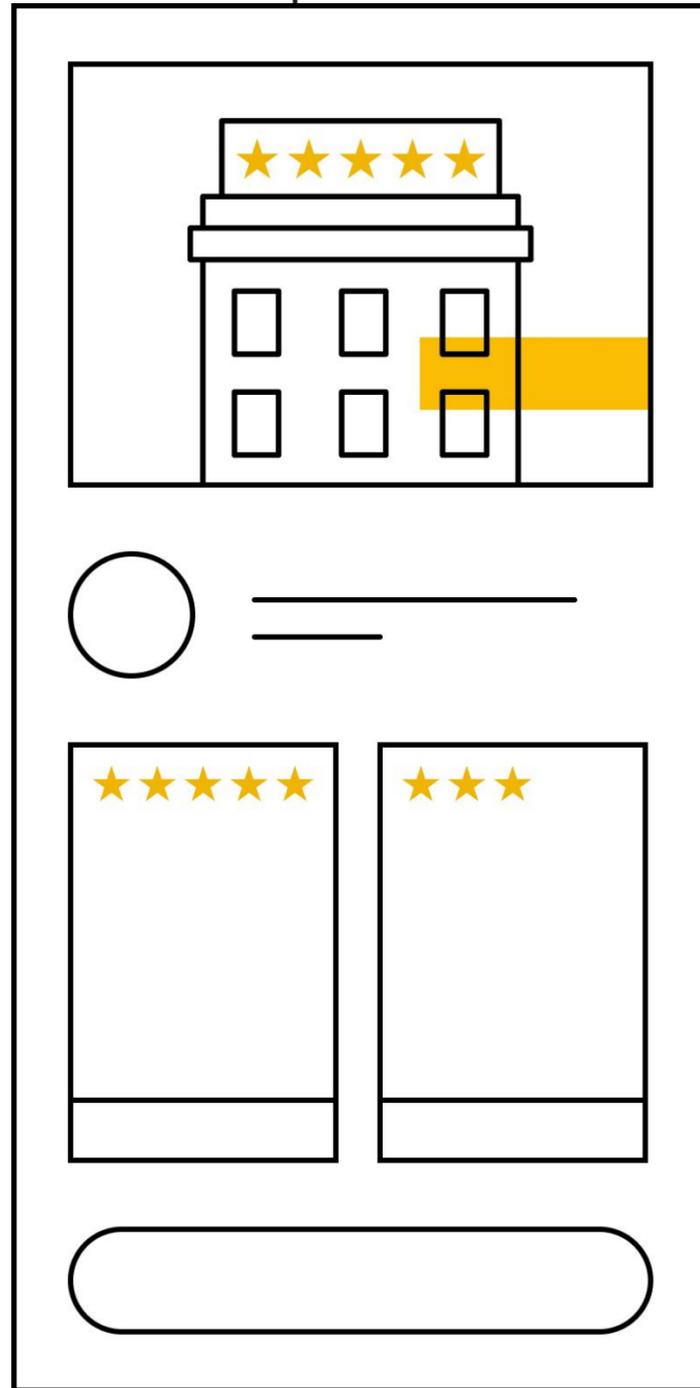
Adding a vertical creative asset to your Video Action Campaign delivered

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 Alpha testing

which allows you to display a selection of your properties below your video ad in the form of a scrollable grid of listings.

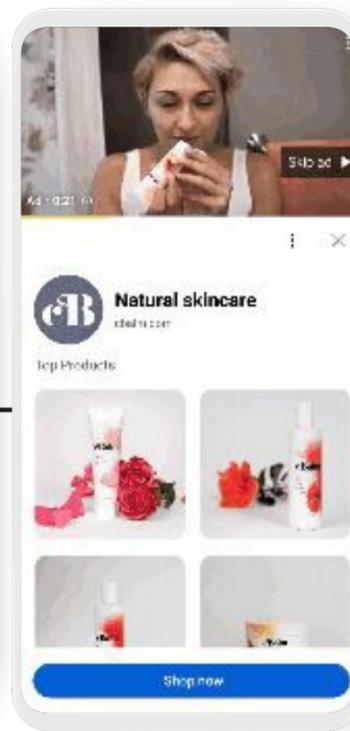
Inspire

Demand Gen a new launched campaign

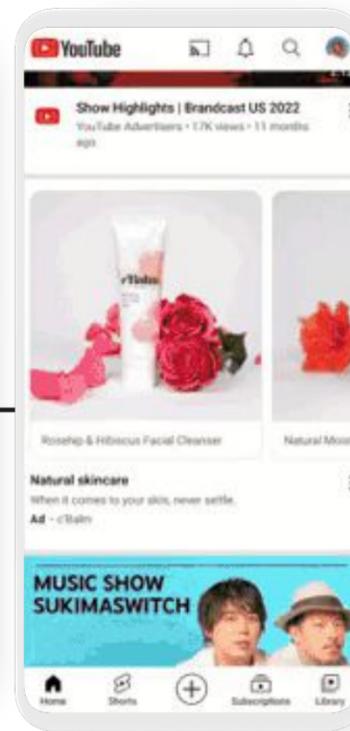
is built to help
advertisers who buy
on social platforms
spur action in the
right moment.



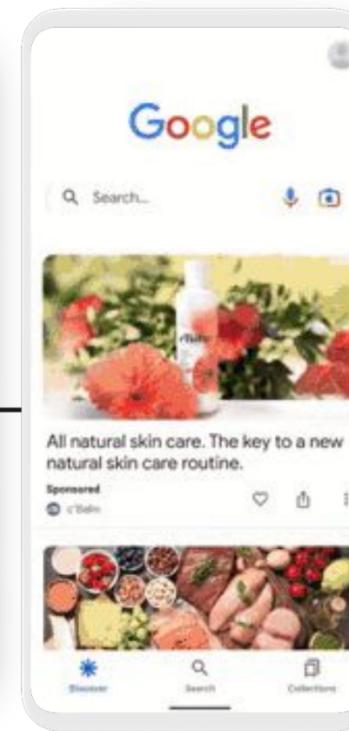
YouTube Shorts



YouTube in-stream



YouTube in-feed



Discover



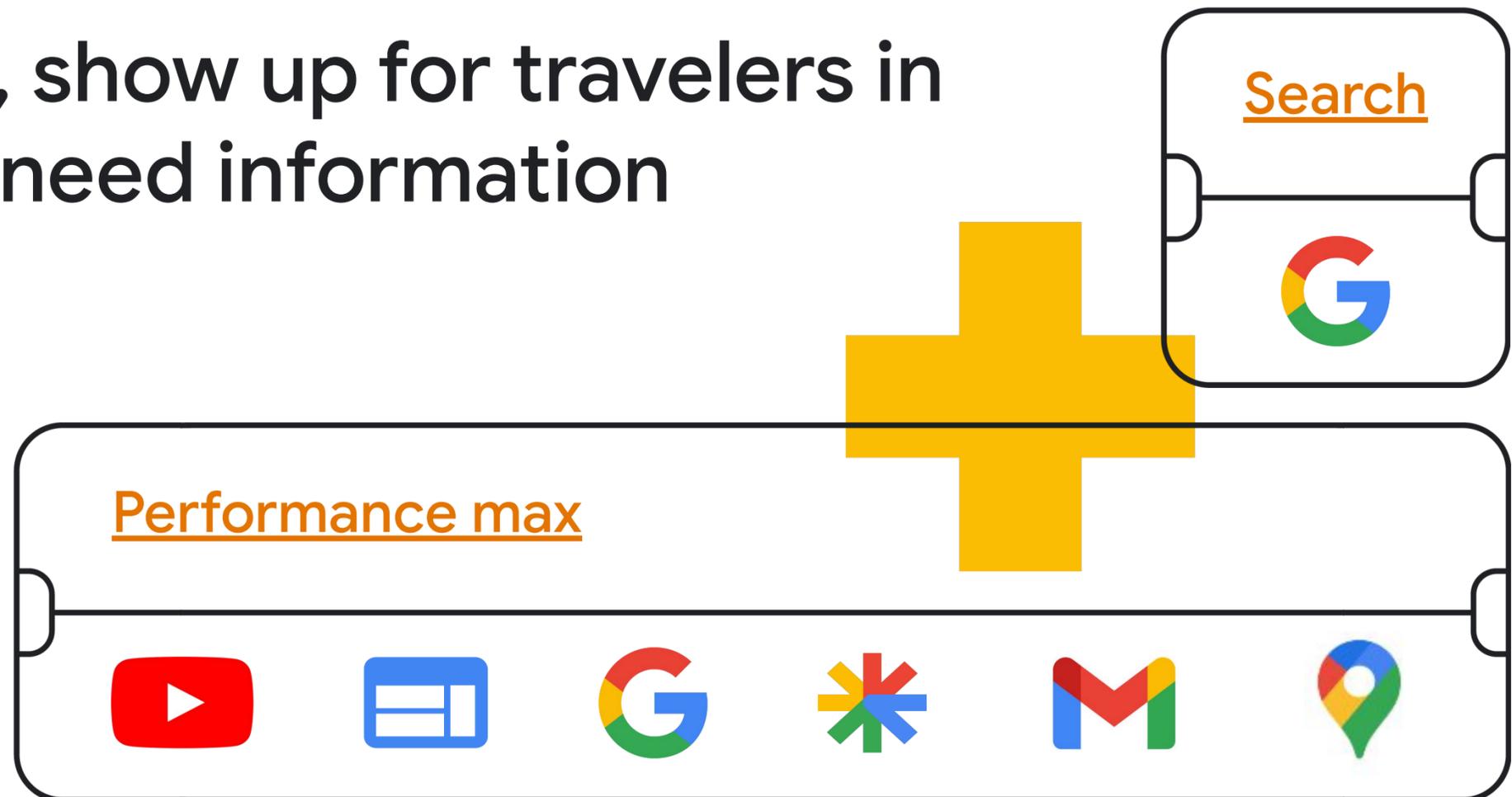
Gmail

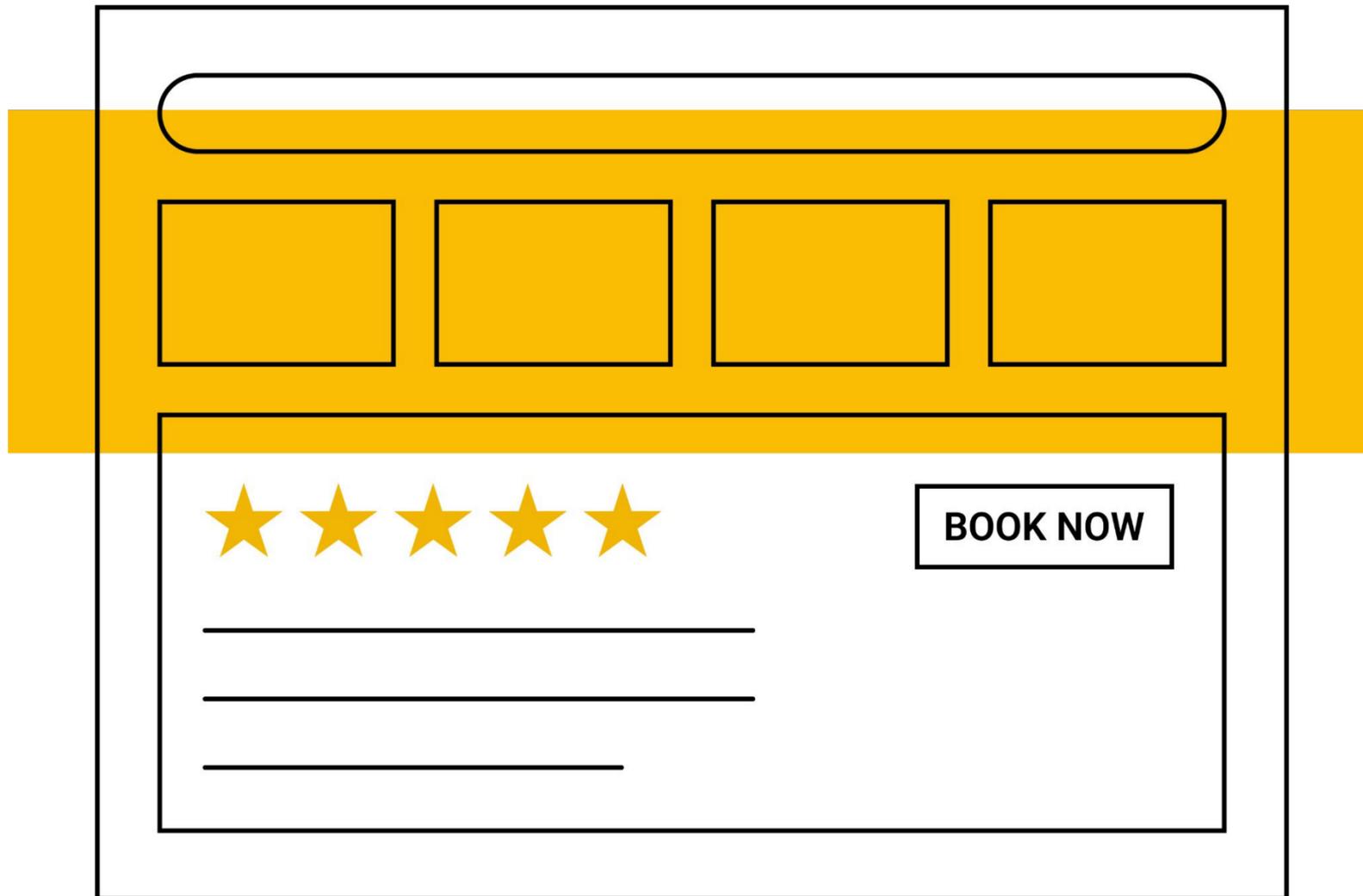
With a combination of video and image ads now in a single campaign, use Demand Gen to reach travelers across the Discover feed, Gmail, YouTube Feeds, YouTube in-stream and YouTube Shorts.

Inform

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





Inform

Hotel Campaigns

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**