

Amadeus Journey of Me Insights

What Asia Pacific travellers want
(Vietnam report)

Sample size: 300
Amadeus Asia Pacific

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METHODOLOGY

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

- Australia (500 respondents),
- China (1,200),
- Hong Kong (300),
- India (1,200),
- Indonesia (500),
- Japan (420),
- Korea (400),
- Malaysia (400),
- New Zealand (250),
- Philippines (400),
- Singapore (300),
- Taiwan (300),
- Thailand (400),
- Vietnam (300).



INTRODUCING THE JOURNEY OF ME



Amadeus believes that no two travellers are the same, and even more so, no two journeys will be the same. At the core of travelling is the creation of experiences that are innately ours.

There are an infinite number of elements that make up the travellers' DNA. Varying factors may influence my travel experience but what defines the "Journey of Me" are my behaviours, feelings, attitudes, and coping mechanisms.

As travellers today become more savvy and better informed, travel and its elements of surprise, magic and wonder have become increasingly challenging to achieve.

Technology brings promise. Now, we have the opportunity to bring the magic back into travel. But only if we first understand what the traveller wants.

In today's world of travel, every engagement point matters. Expectations have surpassed personalisation. Beyond relevance, travel providers must be timely and intuitive to shape each individual experience.

In this journey of ME, cultivating relationships and embracing travellers' individuality should be the priority.

THE FOUR THEMES

In the course of this research, *“Journey of Me Insights: What Asia Pacific travellers want”* uncovered four themes that travel providers need to focus on:

1

There are many Asias within Asia

The most startling observation from the study is that there is no consistent profile for the Asia Pacific traveller. Stark contrasts in behaviours, needs and preferences were observed across all geographic and demographic lines. Vietnamese respondents displayed a number of differentiating characteristics – Vietnamese are a lot more interested in recommendations that ensure their safety compared to other APAC travellers (38% versus 27%).

2

The personalisation-privacy paradox

While 64% of Asia Pacific travellers would be willing to trade personal data for more relevant offers and personalised experiences, Vietnamese travellers are considerably more open, with 71% open to sharing their personal information.

3

Get real: Recommendations they can trust

Rather than the glossy pictures of travel brochures or the carefully curated Instagram feeds of celebrities, Asia Pacific travellers seek what’s genuine, and turn to their fellow travellers for inspiration. The research found that Vietnamese travellers consider their social network gives them the more relevant travel recommendations when they travel for leisure (64%) compared to other travellers in APAC (48%). Only 36% said good recommendations came from online booking sites compared to 50% in the rest of APAC.

4

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

In the world of travel, every engagement point matters. Beyond personalisation, connecting with travellers in a timely and intuitive manner is equally important. The good news is that the vast majority of APAC 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. It’s worth noting that Vietnamese travellers are most interested in receiving travel-based recommendations when they are first considering taking a trip (91%) and when they are evaluating travel options (90%).

SO WHAT DO VIETNAMESE TRAVELLERS WANT?



KNOW ME

- _ **Personalisation or privacy?** Vietnamese travellers are quite open in sharing their personal info with 71% described as somewhat or very open.
- _ **Big screens vs. small screens:** Most Vietnamese respondents research their trips (78%) and make bookings (74%) on laptops or desktop computers, which is aligned with the APAC average (76% and 74%).
- _ **Recommendations that matter:** Vietnamese travellers are a lot more interested in recommendations that ensure their safety compared to other APAC travellers (38% versus 27%). They are less interested in itinerary planning than other APAC travellers (20% versus 27% regionally).
- _ **Who knows better:** The most relevant recommendations for Vietnamese travellers are considered to be from their social network (64%) compared to other travellers in APAC (48%). They also rely a lot more on the hotel concierge compared to the rest of APAC, 39% vs. 15% APAC-wide. Only 36% of Vietnamese respondents said good recommendations came from online booking sites compared to 50% in the rest of APAC. We can deduce from this that Vietnamese travellers prefer human interaction and receiving their recommendations from real people.

INSPIRE ME

- _ **Opportunities to inspire:** In general, 31% of Vietnamese respondents do most of their travel planning during weekends and after work on weekdays (26%). 17% of respondents plan their travel while on holiday which is much less than the regional average (25%). Only 8% of Vietnamese respondents plan their travel while commuting, which is higher when compared to the regional average (5%).
- _ **The influencers:** Friends, family and colleagues (either via word of mouth or through social media) have the greatest influence on trip planning among other channels (score 1.5 out of 3) followed by traveller reviews (e.g. on sites like TripAdvisor) (score 0.9 out of 3) and social media (score 0.8 out of 3).
- _ **New technology:** 71% of Vietnamese travellers are interested in using a virtual personal assistant or concierge service, more than the APAC average (53%).

CONNECT ME

- _ **Reasons to stay connected:** Vietnamese respondents are more inclined than other APAC travellers to stay updated with work/business at 44% compared to 32% regionally. 41% of Vietnamese travellers also stay connected to meet new people compared to 28% regionally. 58% stay connected to share pictures and experiences compared to 54% regionally.
- _ **How to get connected:** Most respondents use Wi-Fi (69%) to stay connected when they are travelling abroad. Local sim cards purchased at the destination (46%) and hotel-provided smartphone devices with free data and local calls (e.g Handy) (45%) are other two most preferred options.
- _ **Apps that add value:** Facebook (33%), Zalo (17%) and Google Maps (14%) are the top 3 mobile apps used while travelling.

TALK TO ME

- _ **A good time to 'talk':** Vietnamese travellers are most interested in receiving travel-based recommendations when they are first considering taking a trip (91%) and when they are evaluating travel options (90%).
- _ **"You can reach me via...":** Vietnamese travellers are less inclined to receive updates or recommendations via messaging services (9%) compared to the rest of APAC (20%). Interestingly, 20% still prefer to receive recommendations via phone call compared to only 7% of APAC travellers that favour this method. Again this shows they like more interaction.

DELIGHT ME

- _ **Speak my language:** Compared to other APAC travellers, Vietnamese place little importance on having tour guides (2%) and service staff (3%) who speak a language they speak/understand compared to 46% and 47% from other APAC travellers. They also do not prioritize finding newspapers or TV programmes in a language they understand (13% compared to 40% APAC). This may be because they accept Vietnamese is not spoken widely around the world.
- _ **New world, new options:** 64% of Vietnamese respondents seldom or have never used the sharing economy apps and services mentioned for getting around or for accommodation during a trip (80%).
- _ **Great expectations:** 94% of Vietnamese travellers stated that a travel provider had exceeded their expectations, which is much higher than the regional average of 86%. Tour operators (31%) impressed respondents the most.

CARE FOR ME

- _ **Travel stoppers:** Many more Vietnamese travellers are influenced (69%) by the occurrence of recent political or social uprising compared to 48% in APAC. They are more likely to alter their travel plans in the event of a natural disaster, 64% compared to the APAC average of 54%.
- _ **Safety updates:** Vietnamese travellers mostly rely on tour operators (61%), friends/family (51%) and travel agents (50%) for their security/safety updates. Only 38% of travellers in the rest of APAC consider tour operators the top source.

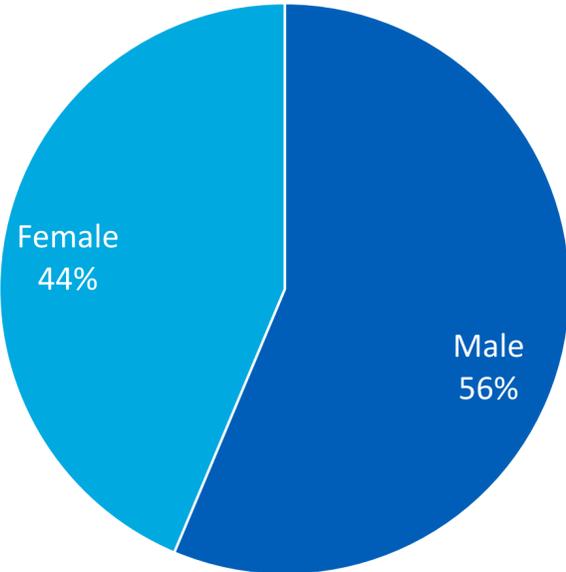
Demographic overview

Who we surveyed

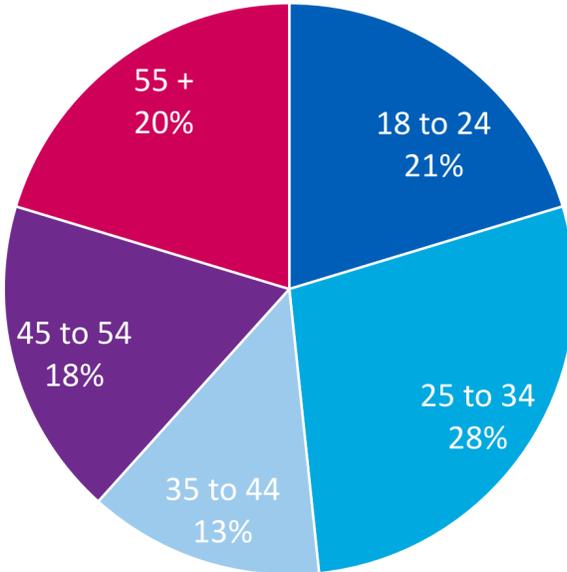


DEMOGRAPHIC OVERVIEW

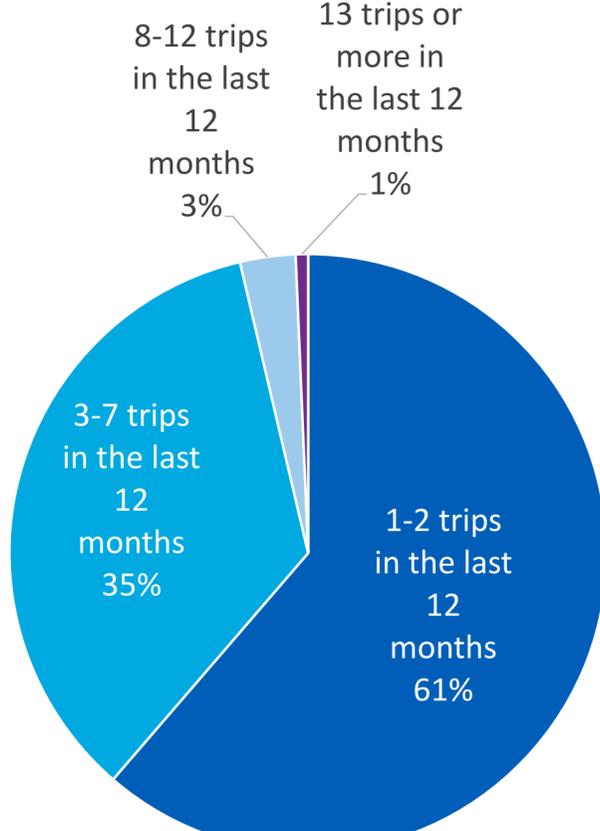
A snapshot



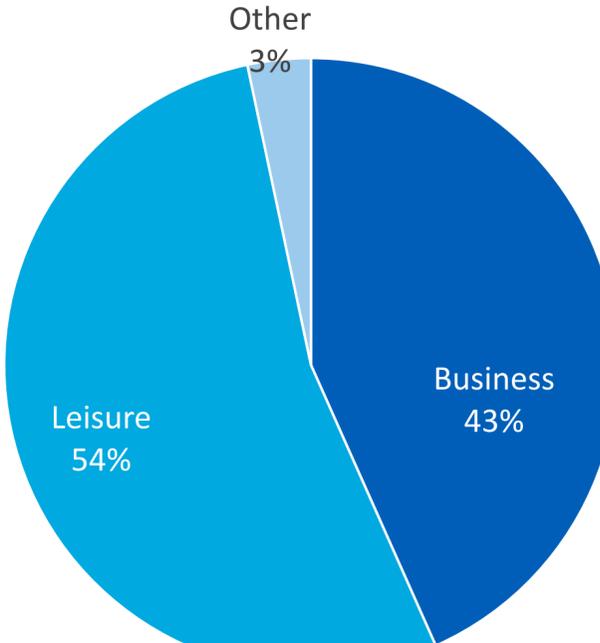
Gender



Age



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



Primary reason for travel

Know Me
and what I want, before I even want it

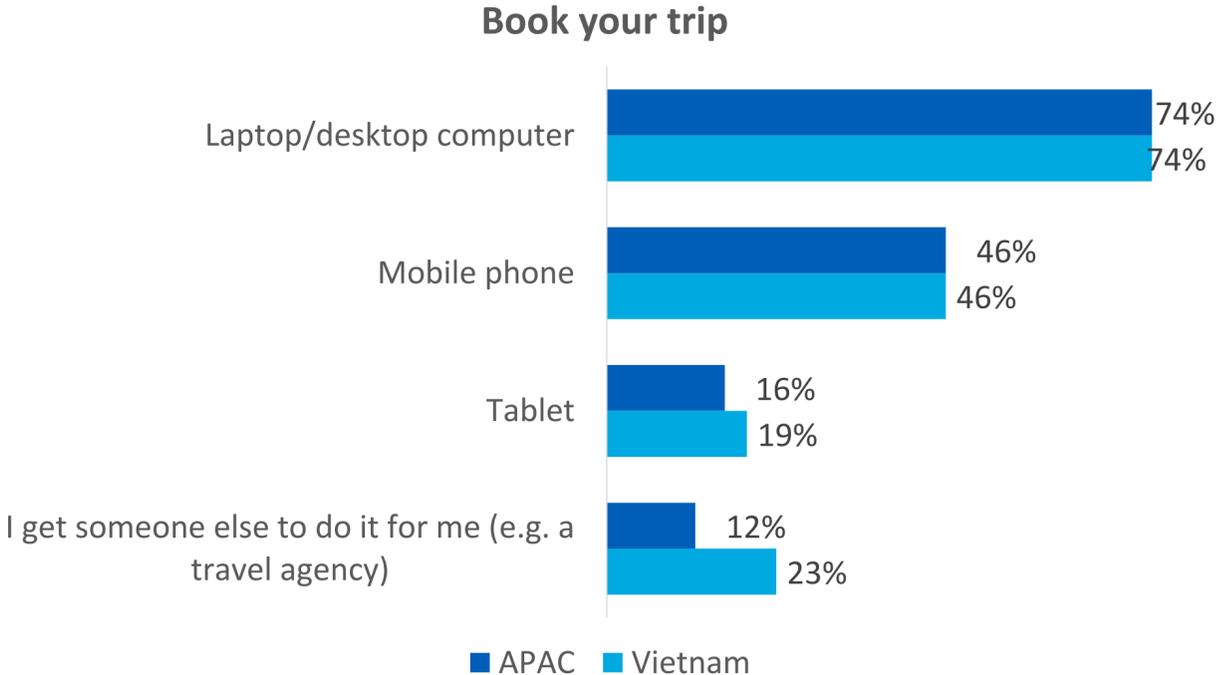
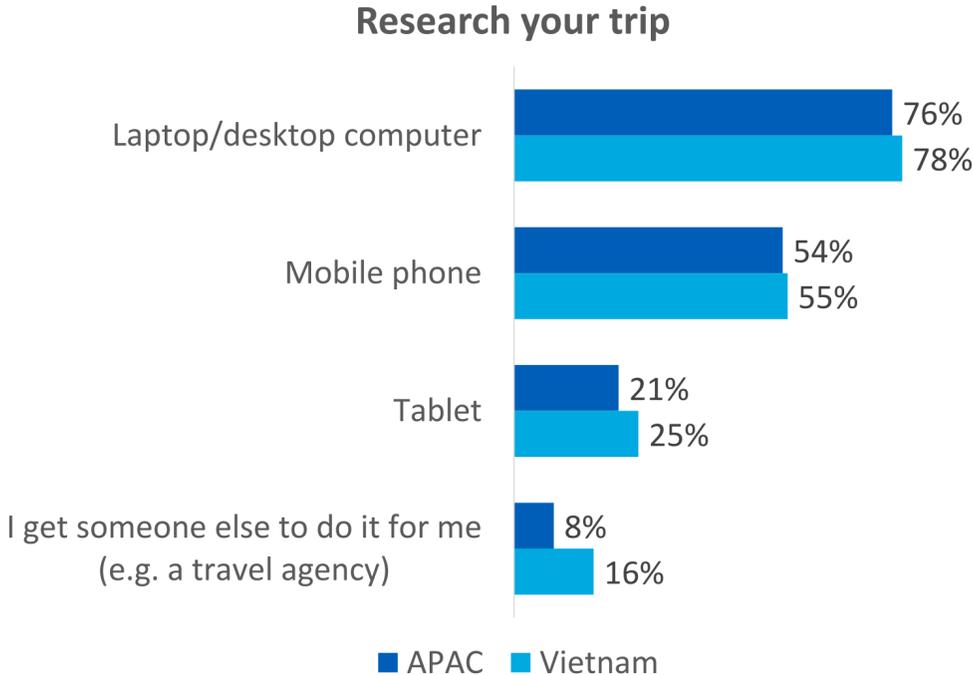


KNOW ME

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



Most Vietnamese respondents research their trips (78%) and make bookings (74%) on laptops or desktop computers, which is aligned with the APAC averages (76% and 74%).



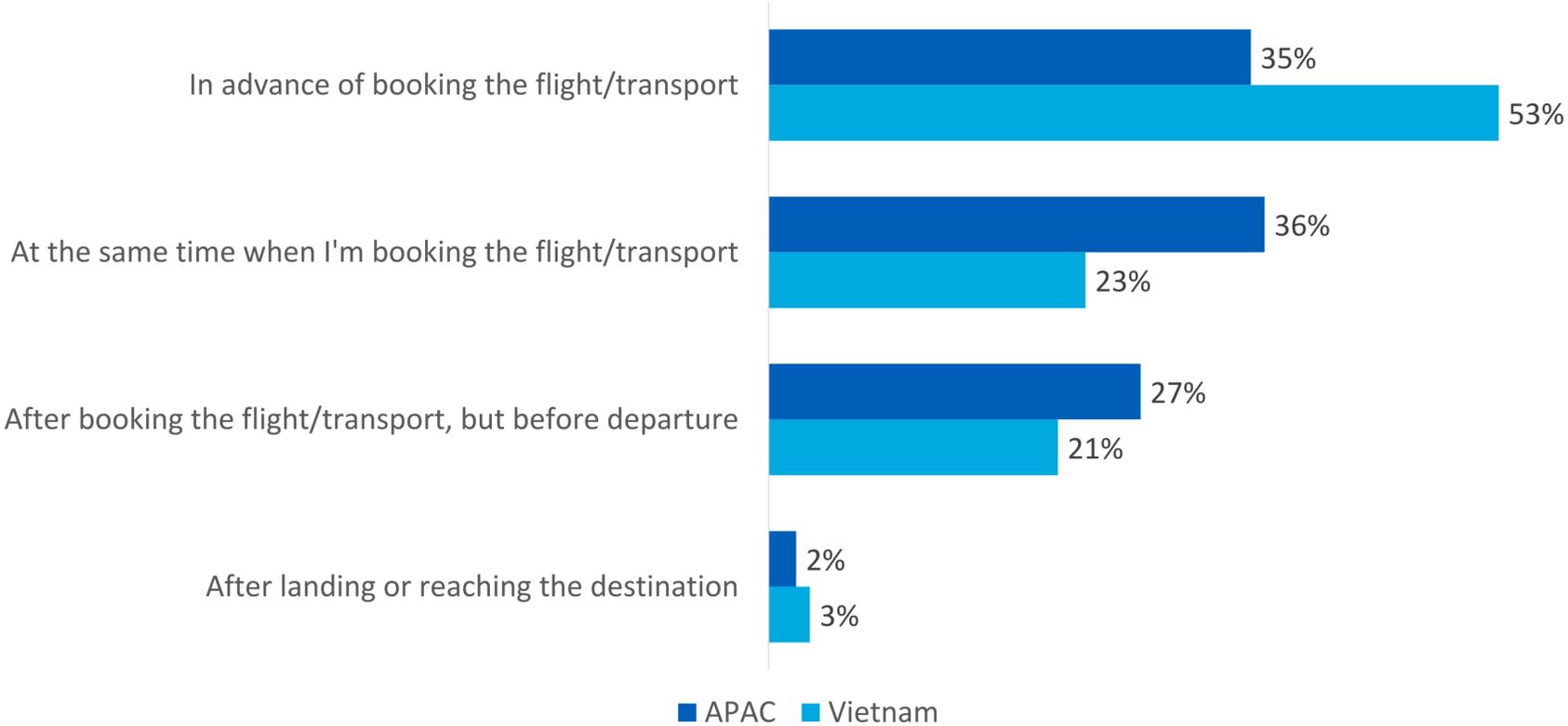
KNOW ME

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

53% of Vietnamese travellers book their accommodation before their flight/transport, compared to 35% in the rest of APAC. Only 23% of Vietnamese compared to 36% in APAC book accommodation at the same time as their flight/transport.



When do travellers book accommodation



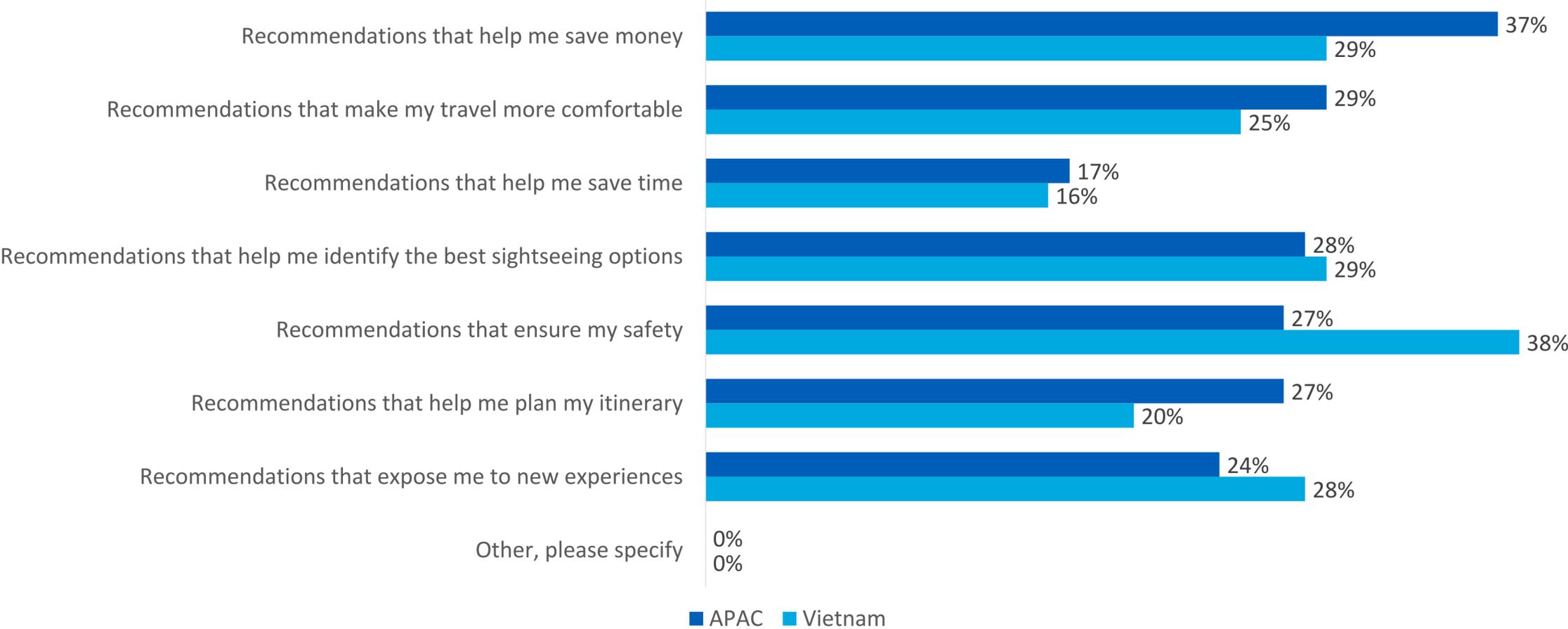
KNOW ME

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

Vietnamese travellers are a lot more interested in recommendations that ensure their safety compared to other APAC travellers (38% versus 27%). They are less interested in itinerary planning than other APAC travellers (20% versus 27% regionally).



Most useful recommendations for leisure travel



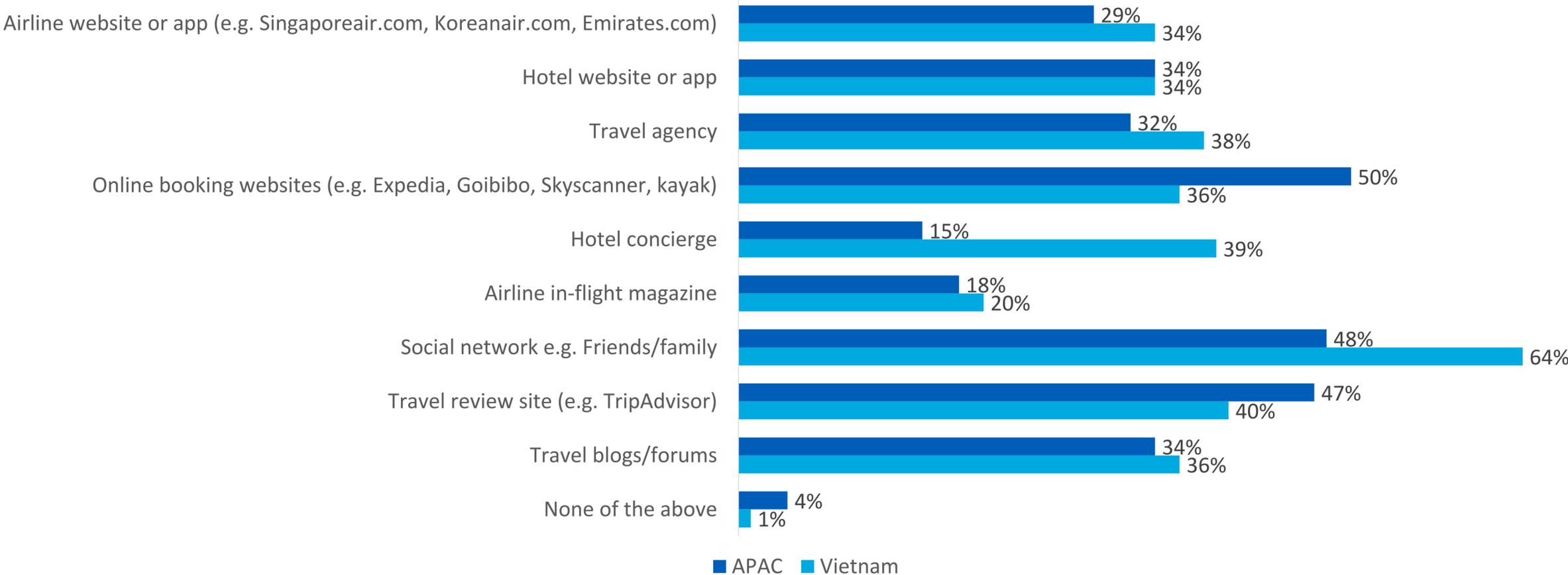
KNOW ME

Q4. When you travel for leisure, which of these platforms have sent you relevant travel recommendations (e.g. about destinations, hotels, things to do, activities, places to eat)? *Select all that apply*



Vietnamese travellers consider that their social network gives them the most relevant travel recommendations when they travel for leisure (64%) compared to other travellers in APAC (48%). They also rely a lot more on the hotel concierge compared to the rest of APAC, 39% vs. 15% APAC-wide. Only 36% said good recommendations came from online booking sites compared to 50% in the rest of APAC. We can devise from this that Vietnamese travellers prefer human interaction and receiving their recommendations from real people.

Platforms that have sent travellers relevant travel recommendations



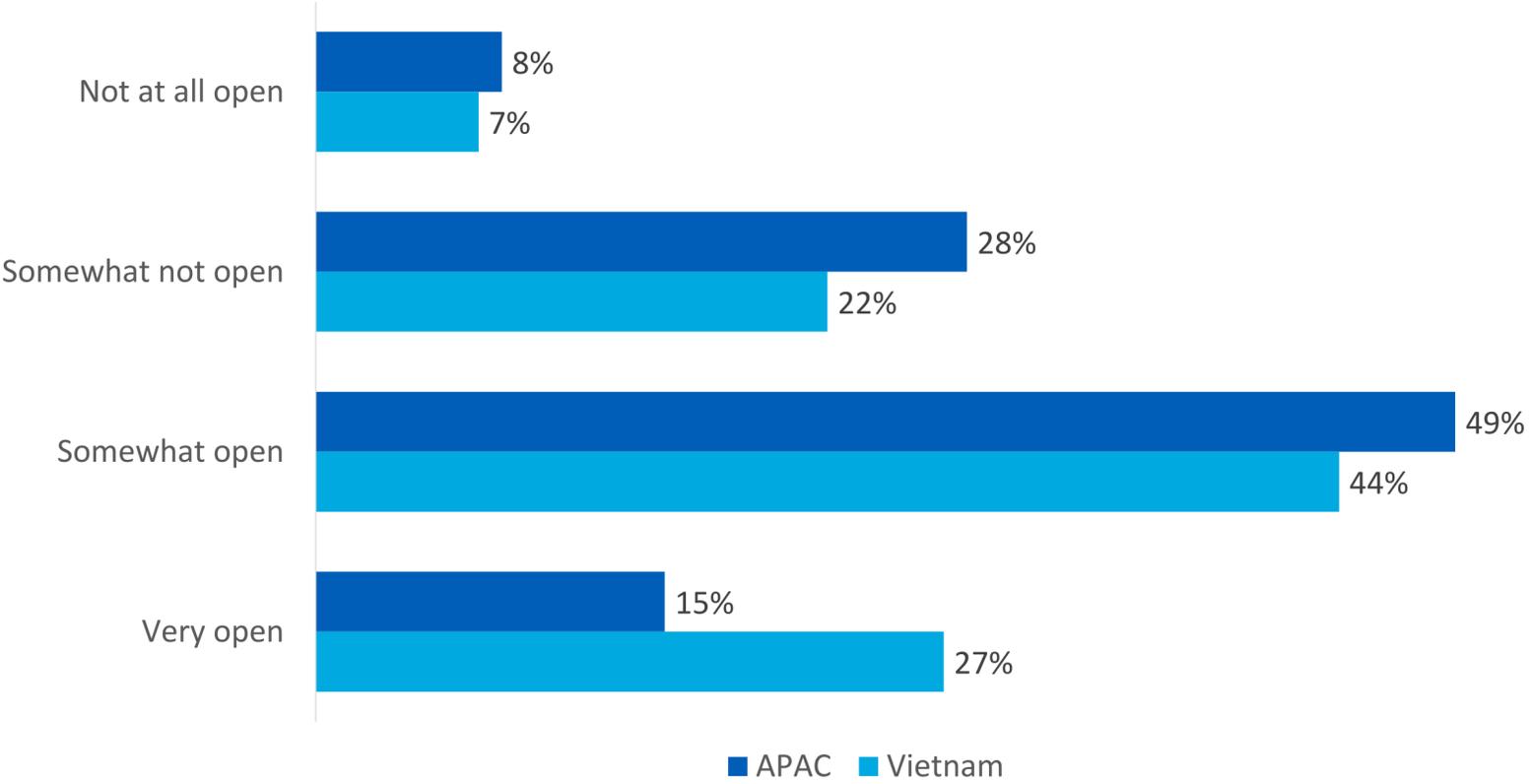
KNOW ME

Q5. In general, how open are you to sharing personal information with travel service providers such as booking websites, airlines, hotels etc., in return for more relevant offers or personalised services?



Vietnamese travellers are quite open to sharing their personal information with 71% described as somewhat or very open.

Openness to sharing personal information with travel providers



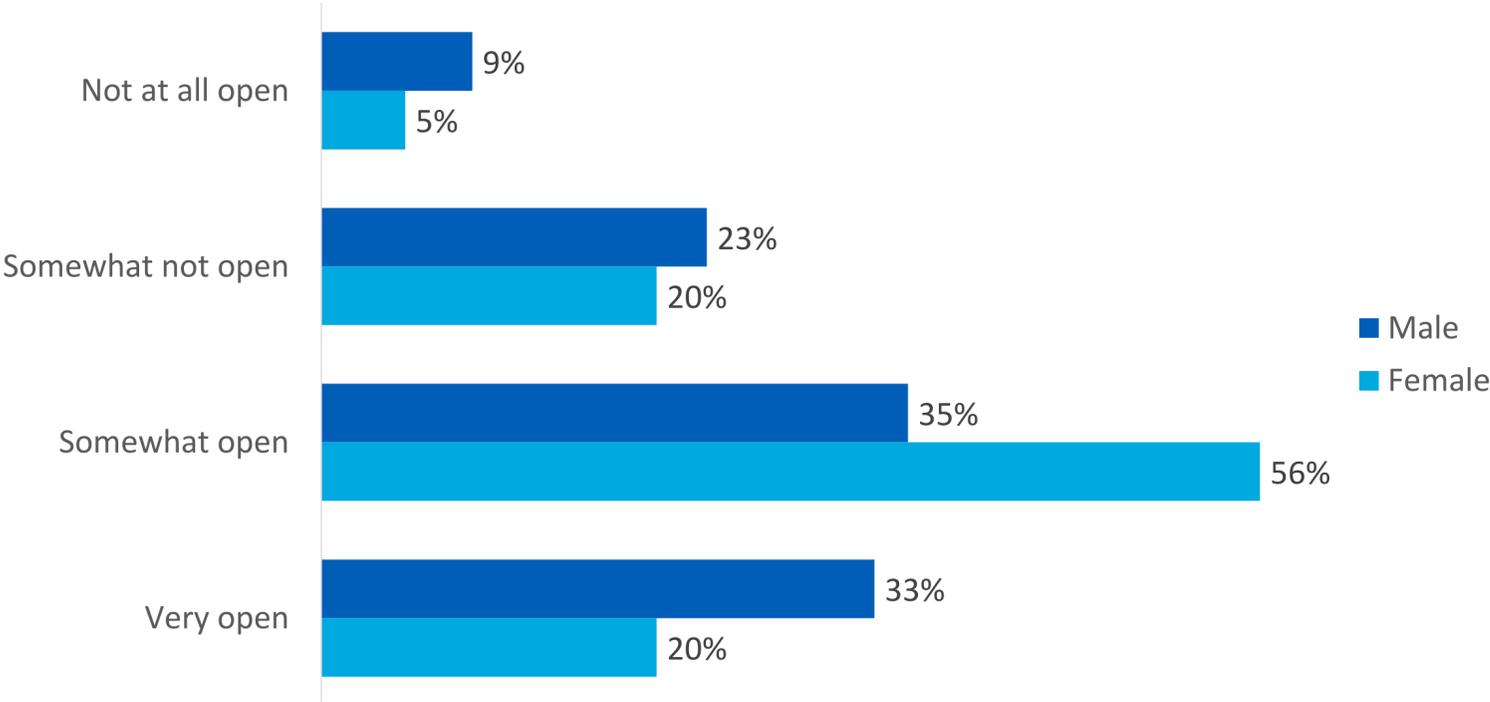
KNOW ME

(Continued) Q5. In general, how open are you to sharing personal information with travel service providers such as booking websites, airlines, hotels etc., in return for more relevant offers or personalised services?

Vietnamese females are more open than males when it comes to sharing data in return for recommendations. 76% of females are 'somewhat' or 'very' open, compared to 68% of males.



Openness to sharing personal information with travel providers



Inspire Me

about the endless possibilities around travel and technology



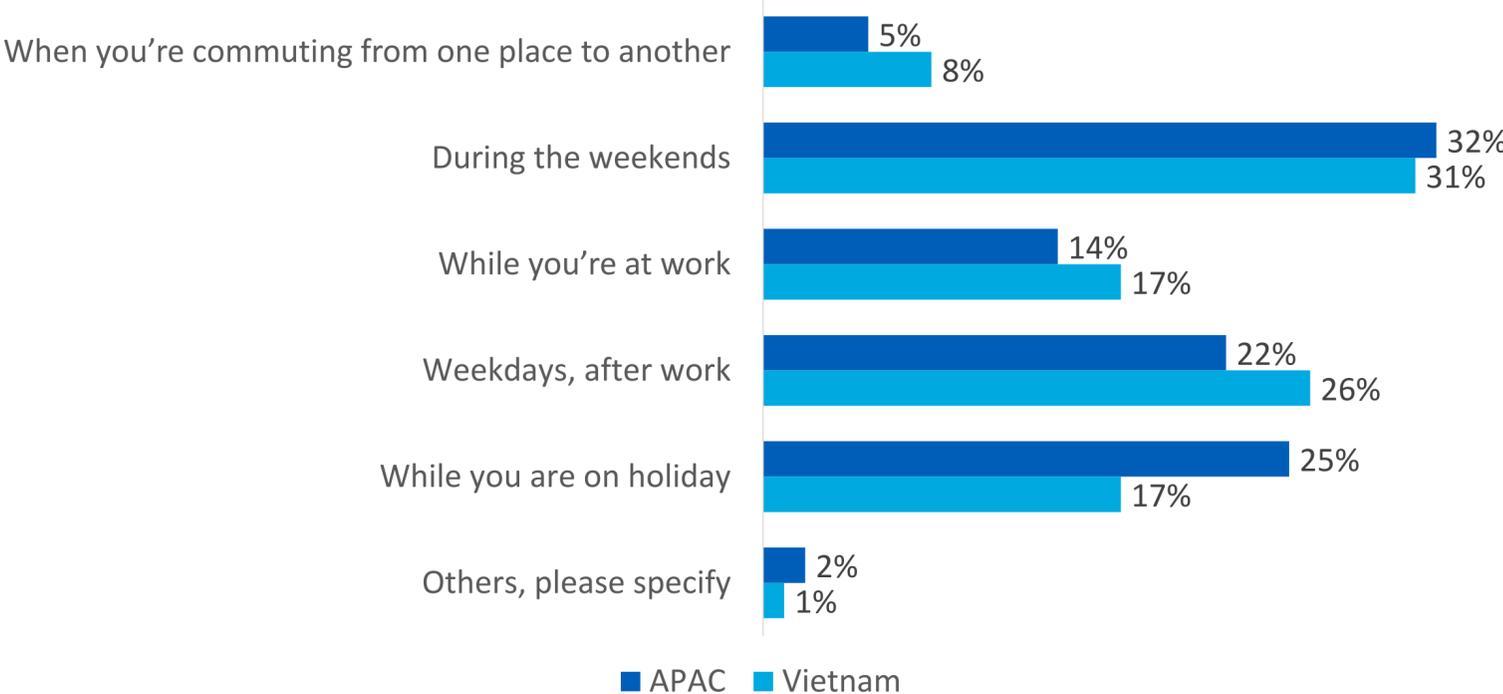
INSPIRE ME

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

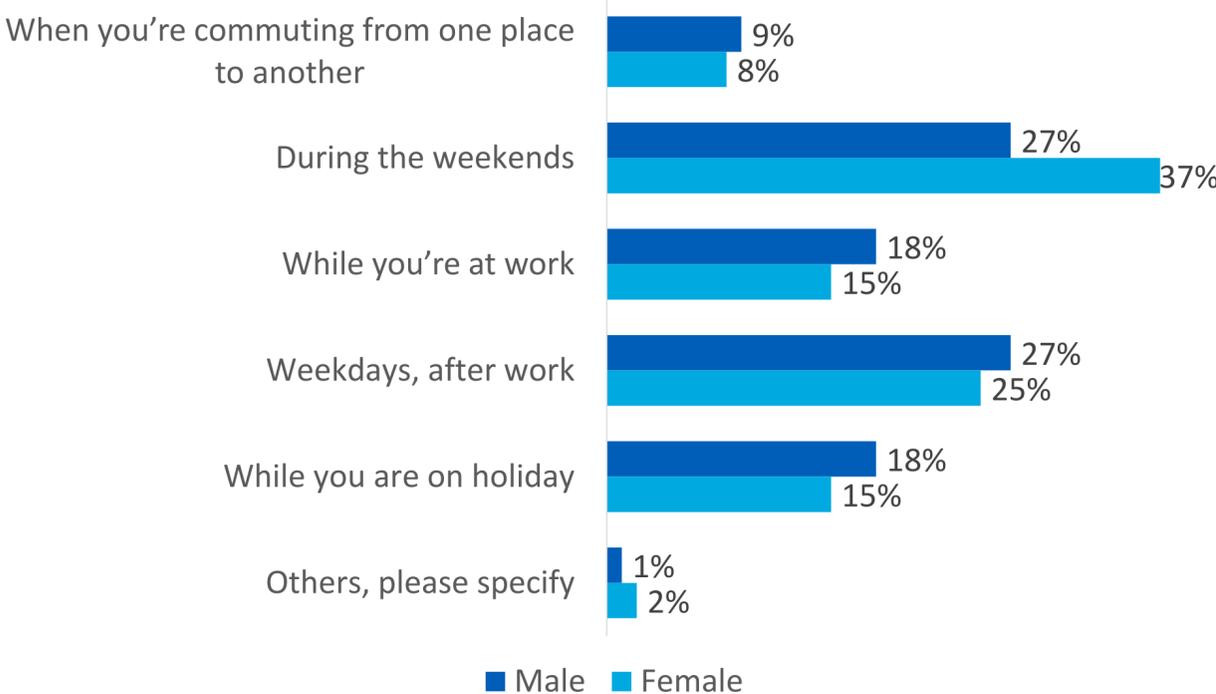
In general, 31% of Vietnamese respondents do most of their travel planning during weekends and after work on weekdays (26%). 17% of respondents plan their travel while on holiday which is much less than the regional average (25%). Only 8% of respondents plan their travel while commuting, which is higher when compared to the regional average (5%). Female travellers are more likely to plan their travel at the weekends (37%) compared to men (27%).



When travellers plan their travels



By gender



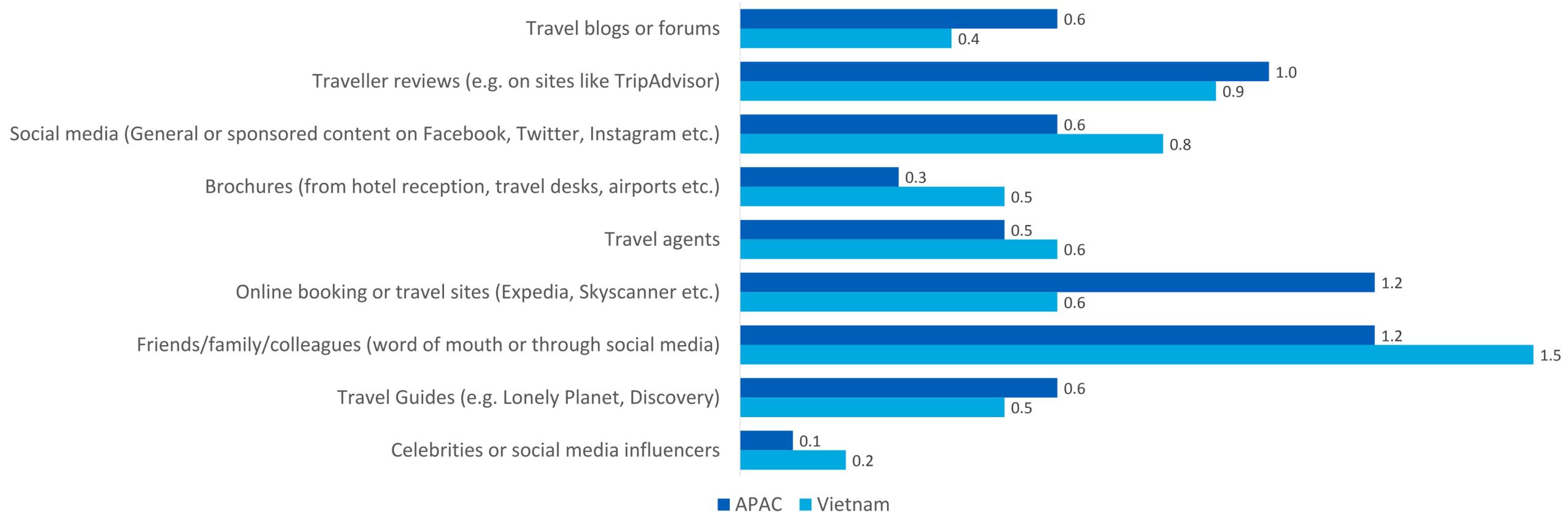
INSPIRE ME

Q7. When it comes to planning your trip (looking for destinations, places to stay, activities to do etc.), which three of the following influence you the most?
Rank in order of influence – from highest to lowest



Vietnamese travellers look to friends/family/colleagues a lot more than other APAC travellers, 1.5 vs. 1.2 regionally. This is followed by traveller reviews (e.g. on sites like TripAdvisor) (score 0.9 out of 3) and social media (score 0.8 out of 3). Online booking or travel sites are not as influential to Vietnamese travellers compared to others in APAC (0.6 vs. 1.2 regionally).

Sources that influence travellers' trip planning



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

INSPIRE ME

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

Among other technologies, a virtual personal travel assistant or concierge that accompanies the traveller on their trip (1.6 out of 3) interests Vietnamese respondents the most.



New technologies travellers are most interested in



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

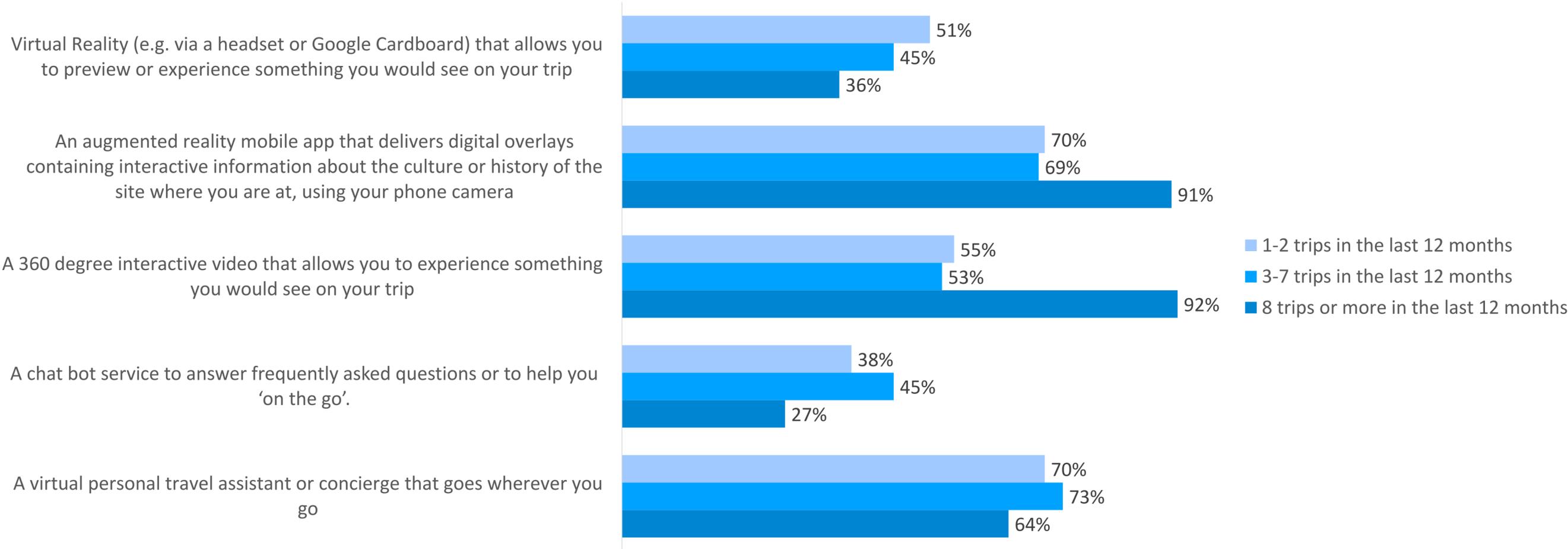
INSPIRE ME

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

Frequent travellers (over 8 trips a year) are most interested in an augmented reality mobile app (2.2) compared to other travellers (1.4). They are less interested than others in using a chat bots (0.5) than those who travel less often (0.7 and 0.8).



New technologies travellers are most interested in



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

Connect Me

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



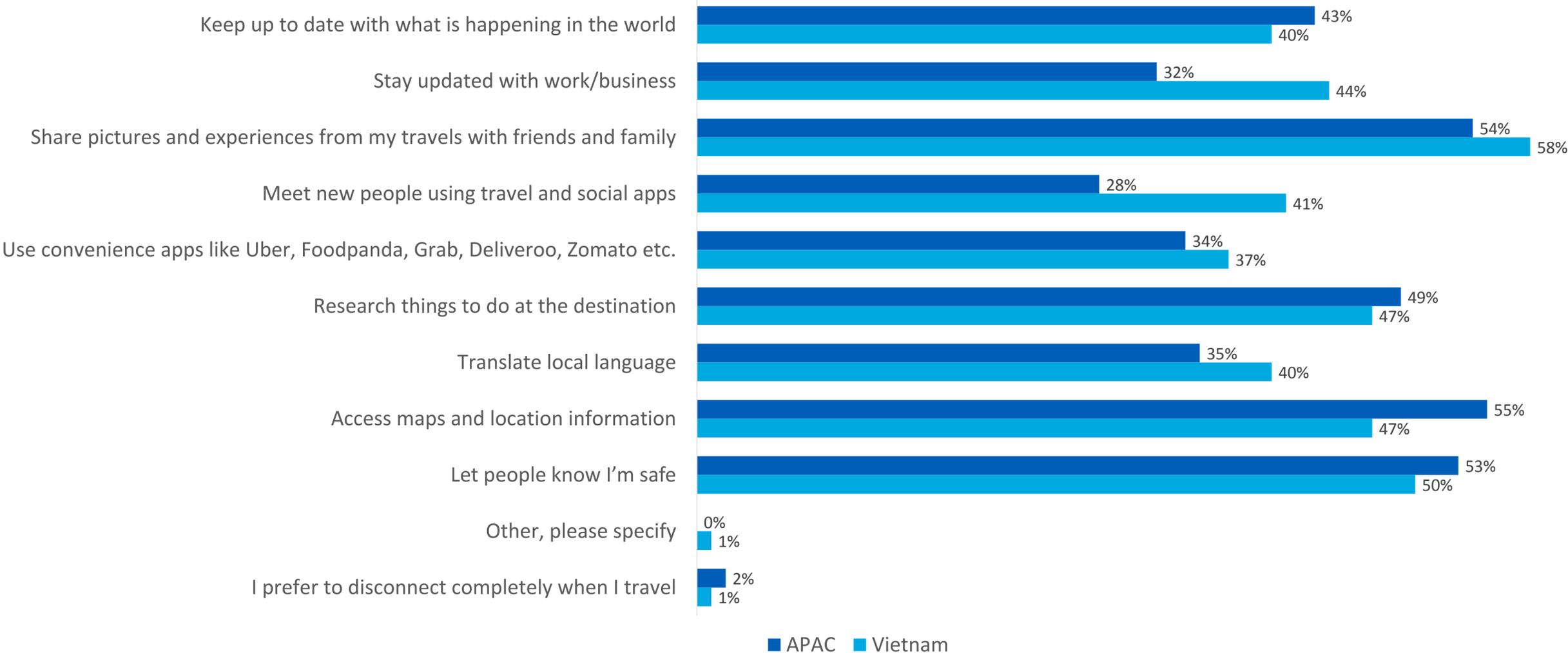
CONNECT ME

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

58% stay connected to share pictures and experiences compared to 54% regionally. Vietnamese travellers are more inclined than other APAC travellers to stay updated with work/business, 44% compared to 32% regionally. 41% of Vietnamese respondents also stay connected to meet new people compared to 28% regionally.



Why travellers want to stay connected when travelling



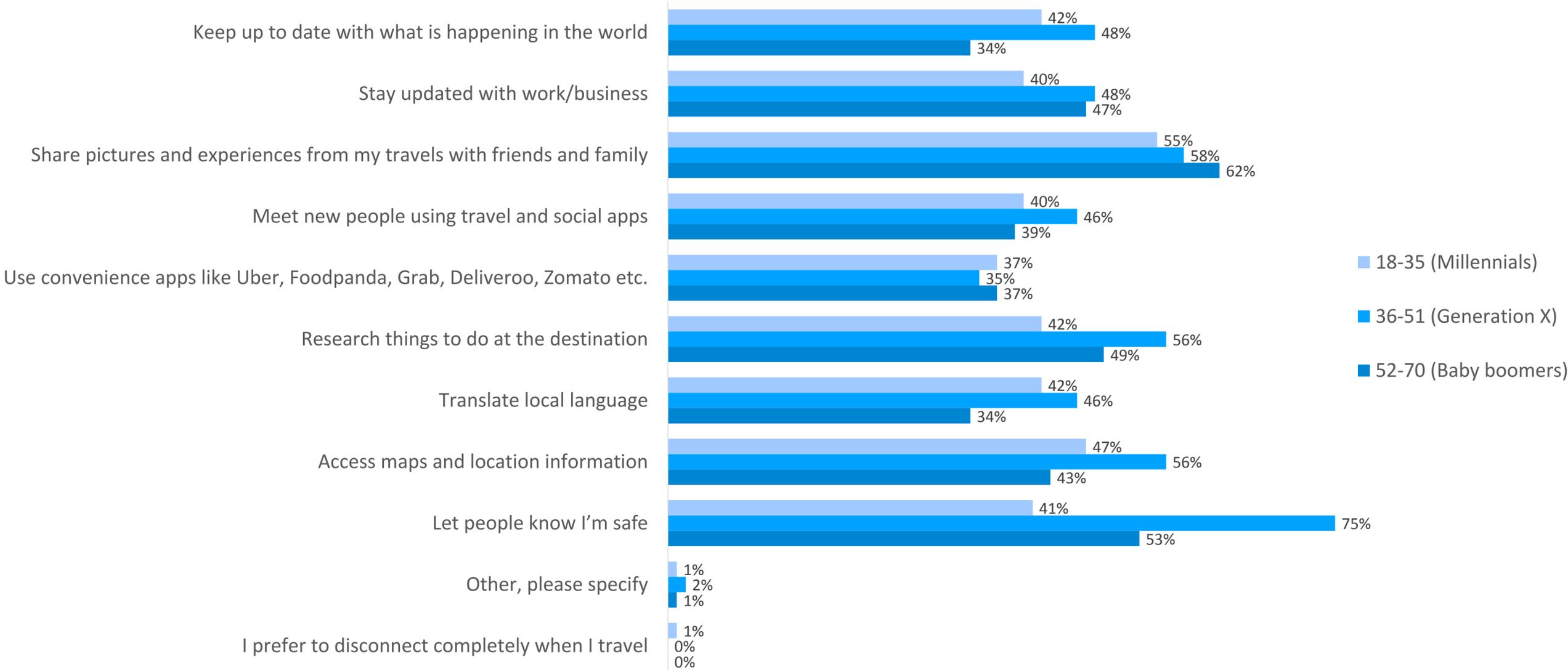
CONNECT ME

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

Interestingly, generation X respondents are most interested (75%) in staying connected to let people know they are safe. In comparison, only 41% of millennials prioritize this and 53% of baby boomers.



Why travellers want to stay connected when travelling



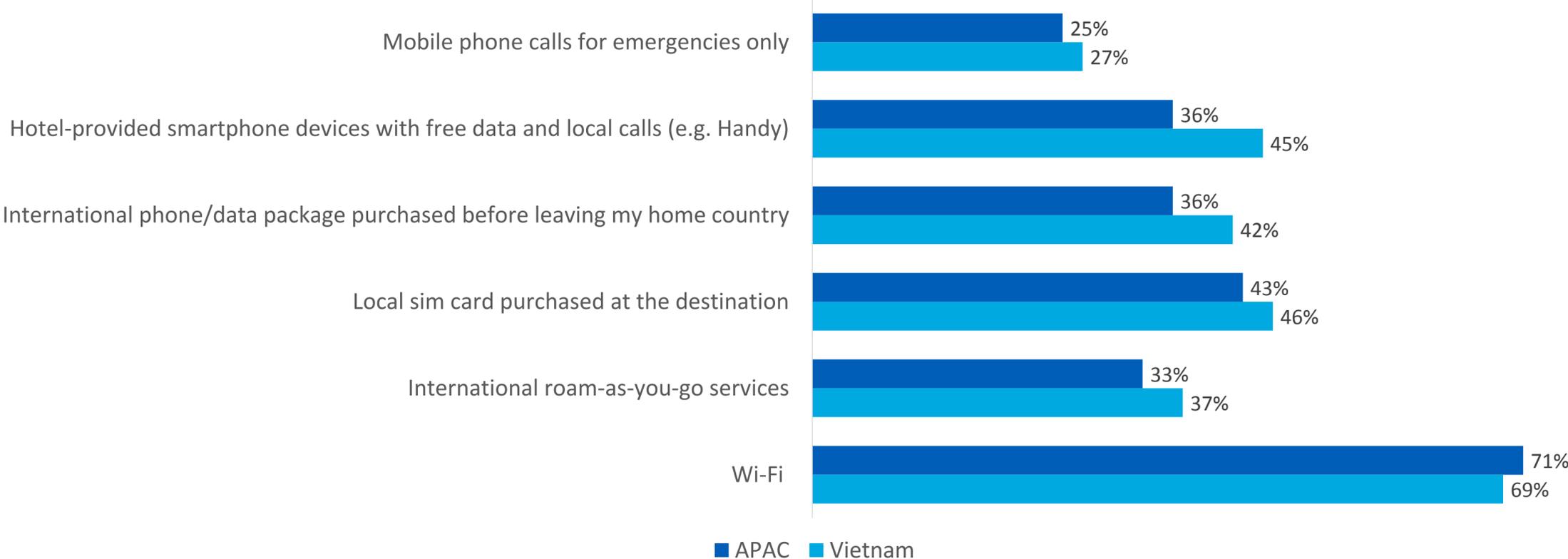
CONNECT ME

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

Most respondents use Wi-Fi (69%) to stay connected when they are travelling abroad. 45% rely on hotel-provided smartphone devices to stay connected, versus 36% regionally.



How travellers choose to stay connected when travelling abroad



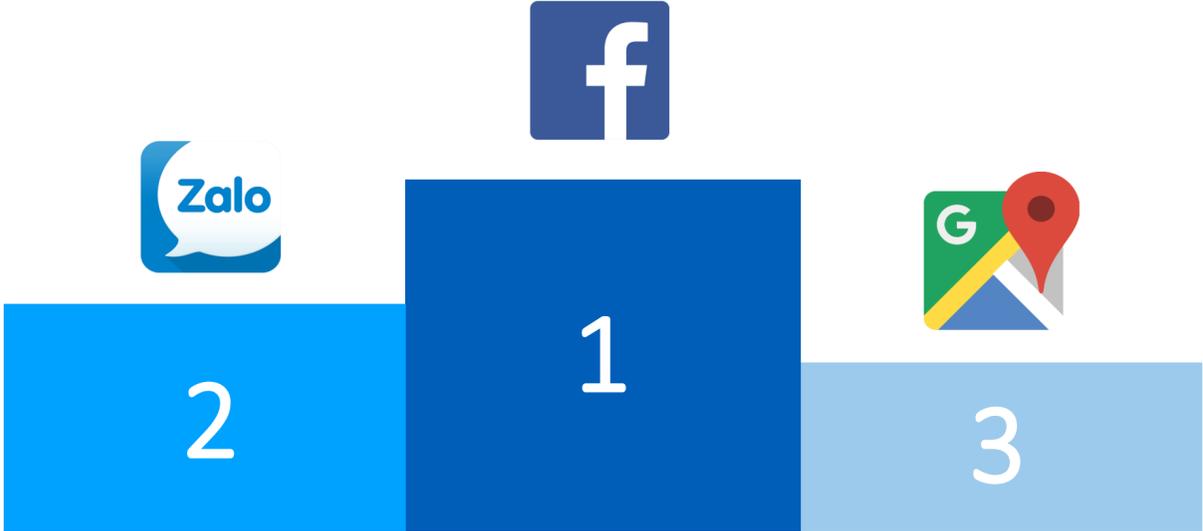
CONNECT ME

Q11. Please list the top three mobile apps you use while travelling that add value to your trip. If you do not use any apps while travelling, enter 'NA'

Facebook (33%), Zalo (17%) and Google Maps (14%) are the top 3 mobile apps used by Vietnamese respondents while travelling. 42% of those surveyed do not use apps on their trips.



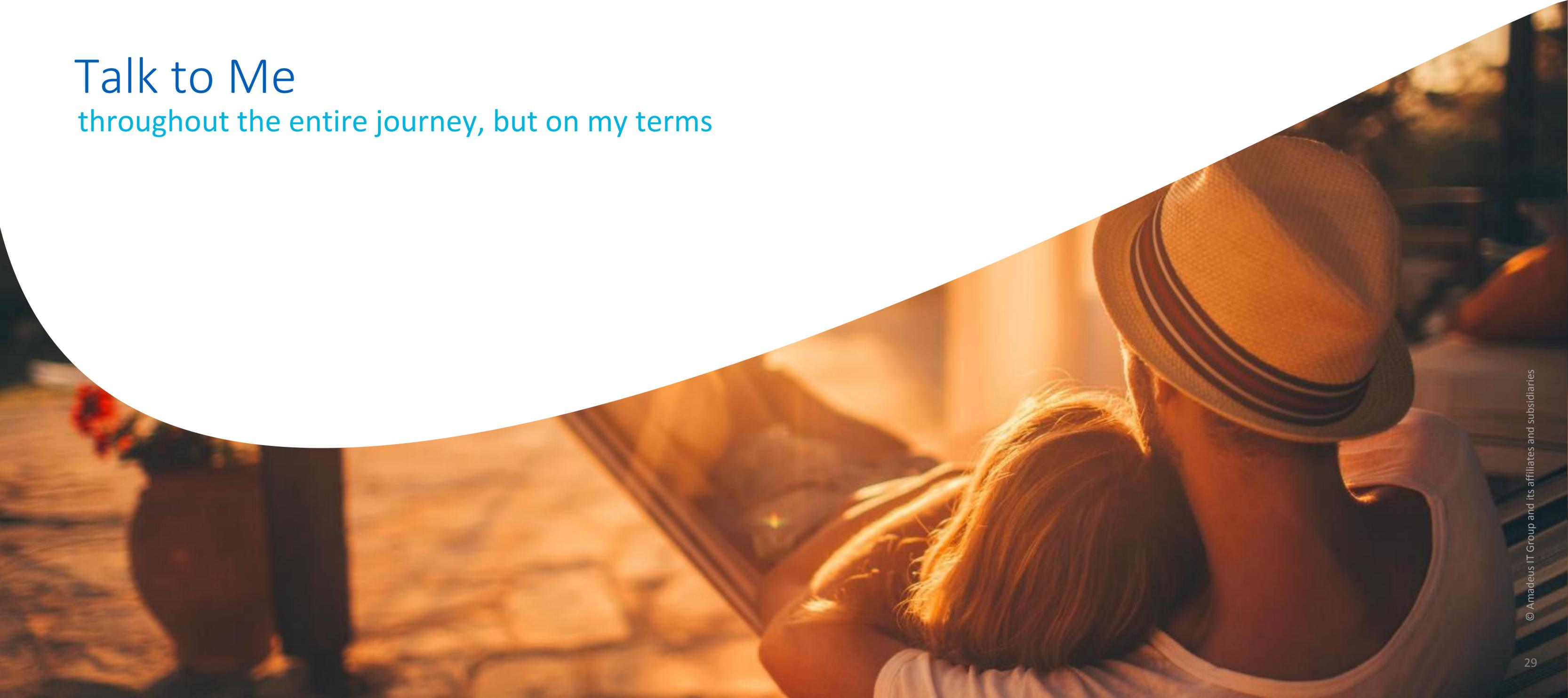
Top 3 mobile apps used while travelling



Sample size: 500

Talk to Me

throughout the entire journey, but on my terms

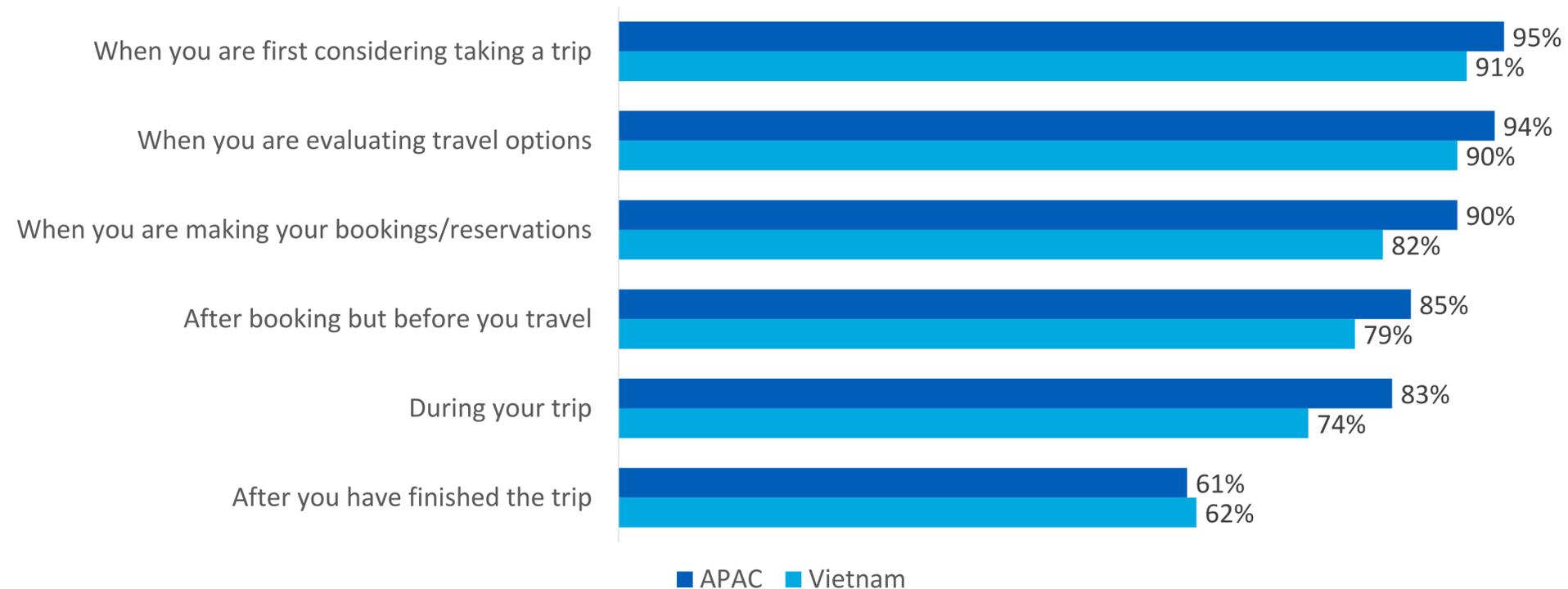


TALK TO ME

Q12. How interested are you in receiving travel-based recommendations (e.g. things to do, places to visit or eat etc.) in the following stages of your travel?

Vietnamese travellers are most interested in receiving travel-based recommendations when they are first considering taking a trip (91%) and when they are evaluating travel options (90%).

% of travellers interested in receiving travel-based recommendations



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

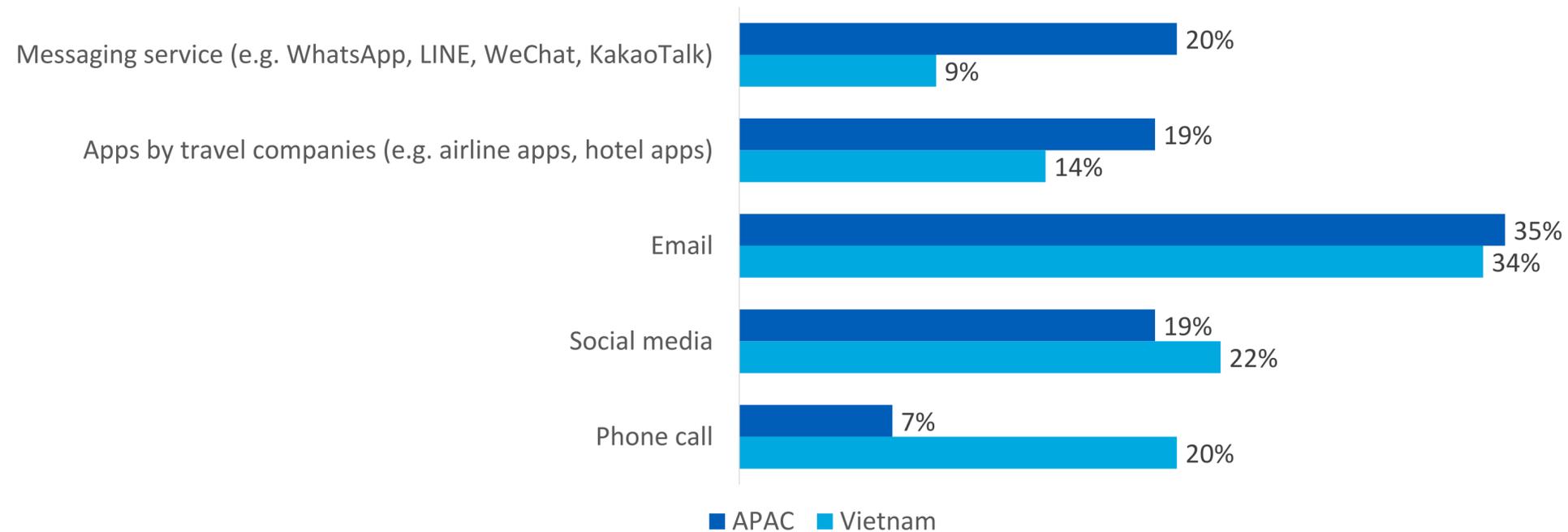


TALK TO ME

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

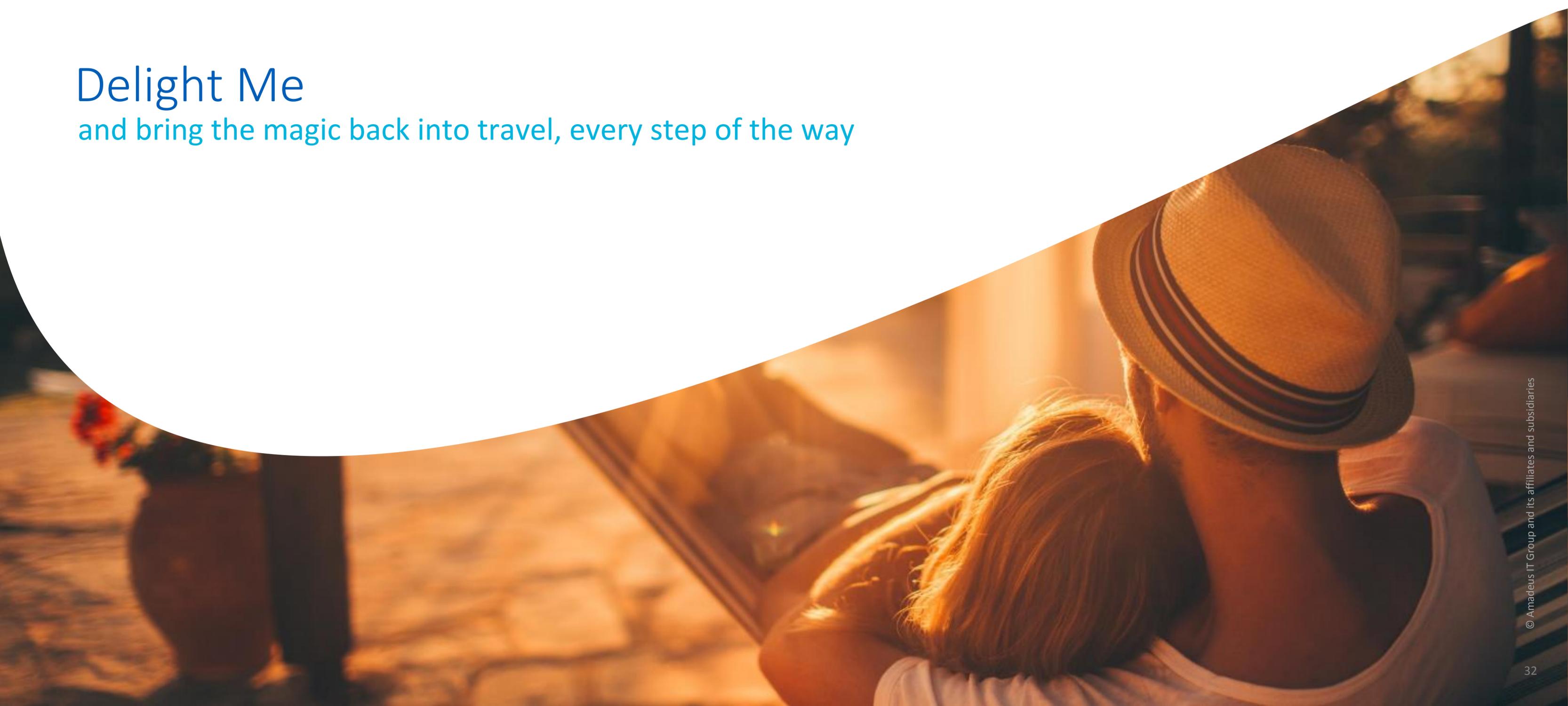
Vietnamese travellers are less inclined to received updates or recommendations via messaging services (9%) compared to the rest of APAC (20%). Interestingly, 20% still prefer to receive recommendations via phone call (20%) compared to only 7% of APAC travellers that favour this method. Again this shows they like more interaction.

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



Delight Me

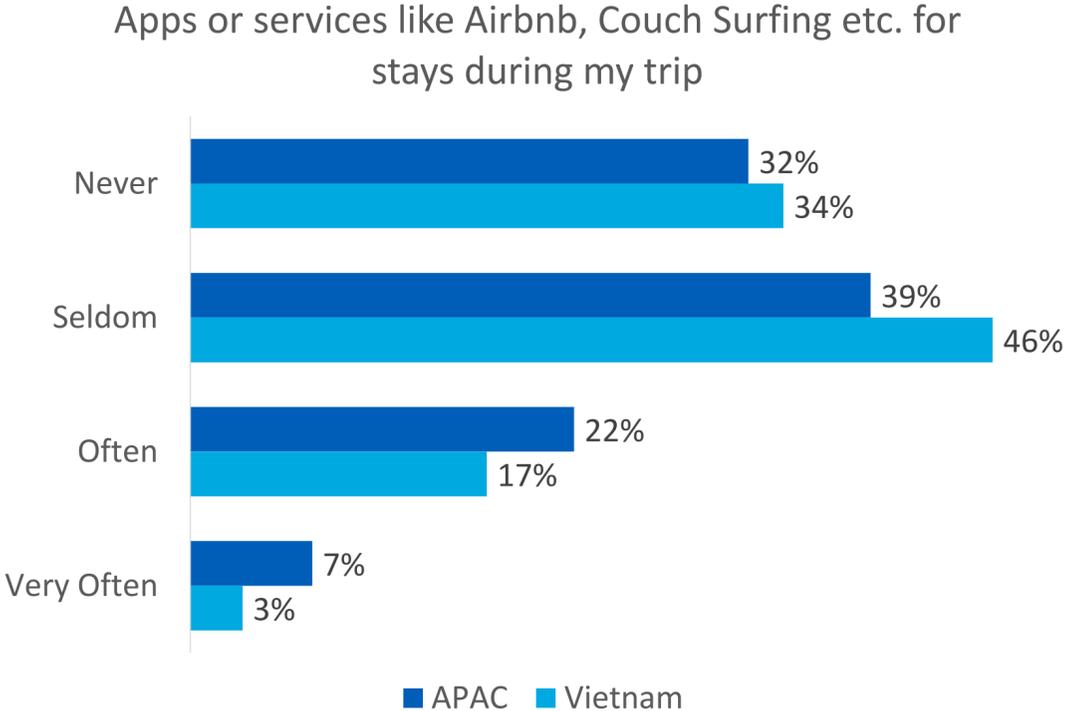
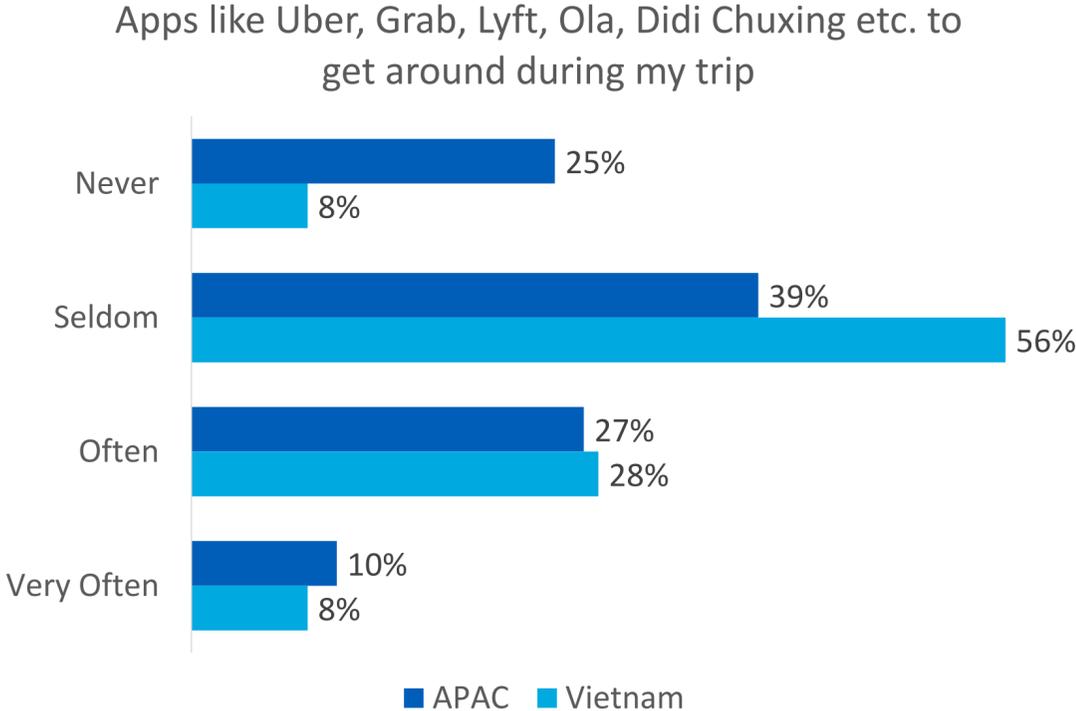
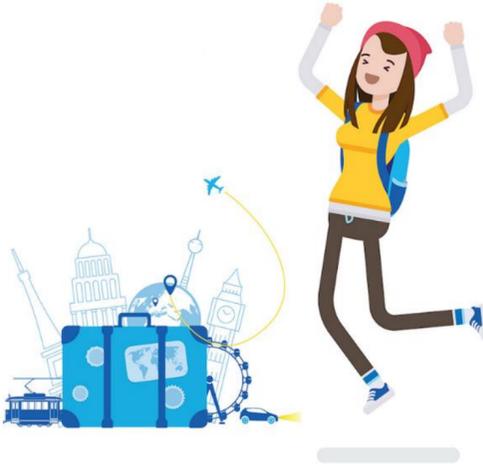
and bring the magic back into travel, every step of the way



DELIGHT ME

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

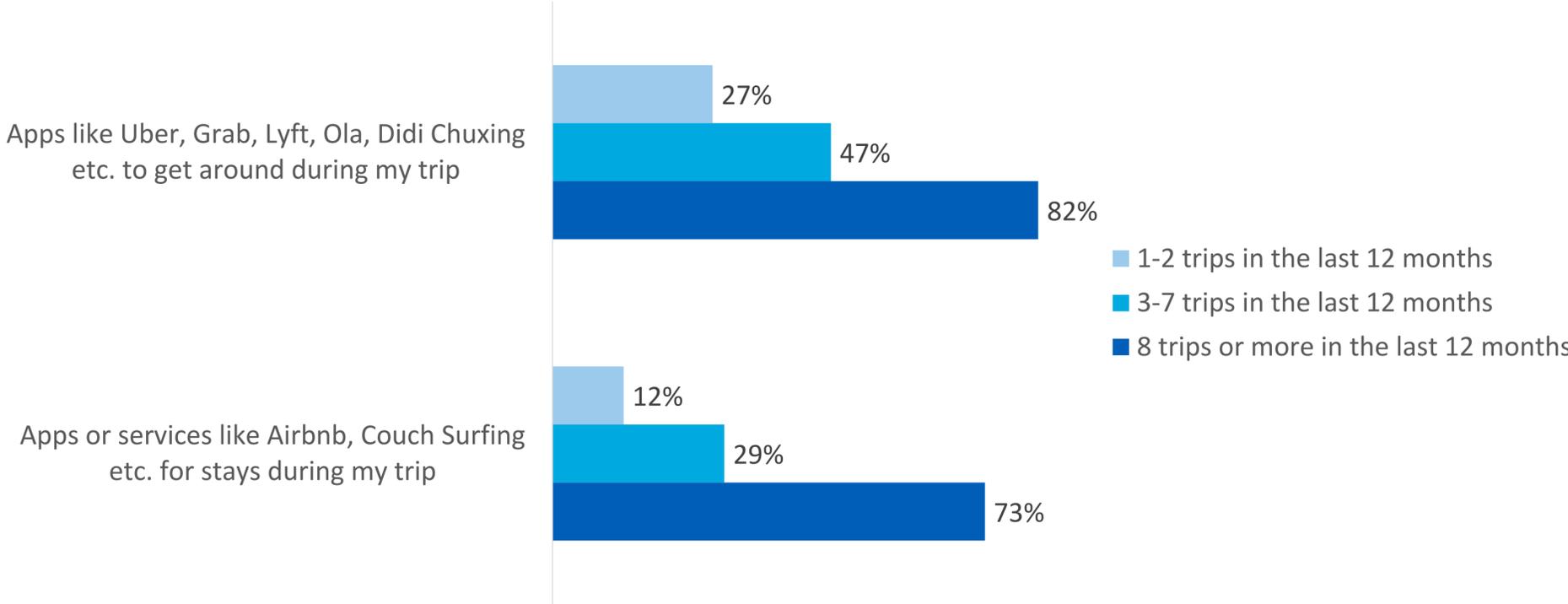
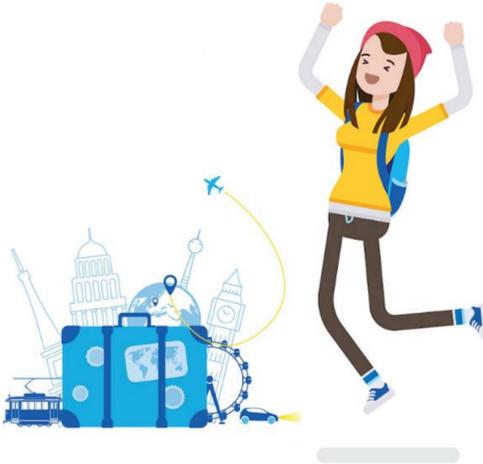
Sharing economy usage in Vietnam is on par with the APAC averages. 36% use apps or services to get around ‘often’ or ‘very often’, compared to 37% across APAC. Accommodation apps/services usage is below the APAC average. Only 20% use them ‘often’ or ‘very often’ compared to 29% in the rest of the region.



DELIGHT ME

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

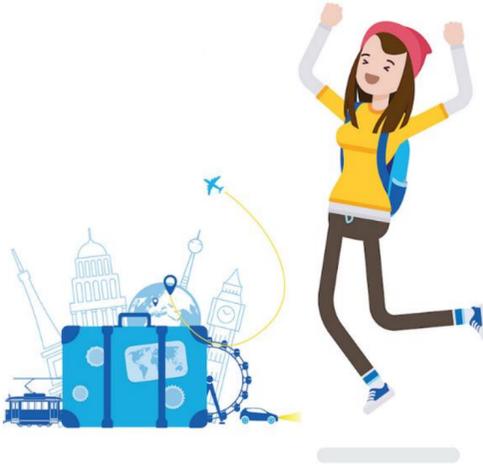
Frequent travellers (8+ trips) are more avid users of sharing economy services. 82% use apps/services for getting around compared to just 27% of those who took 1-2 trips in the last year. Similarly, for accommodation apps/services, 73% of frequent travellers used them compared to just 12% of travellers who take 1-2 trips a year.



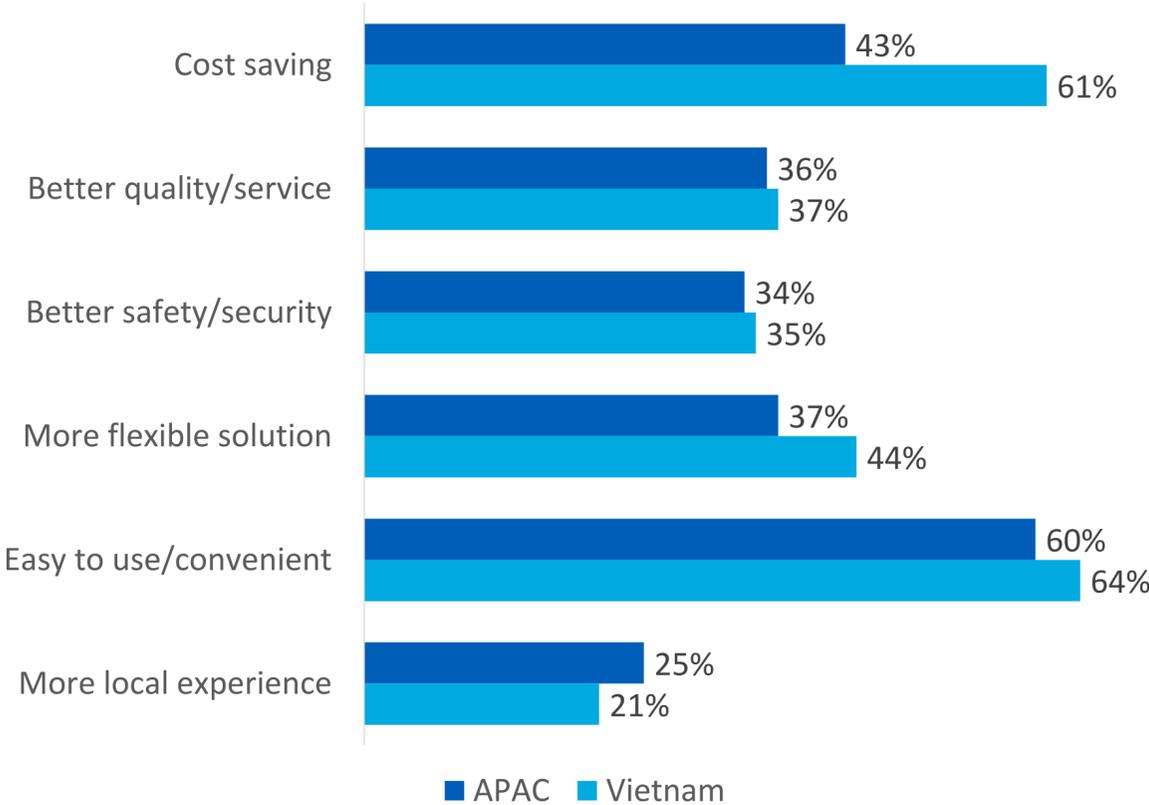
DELIGHT ME

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

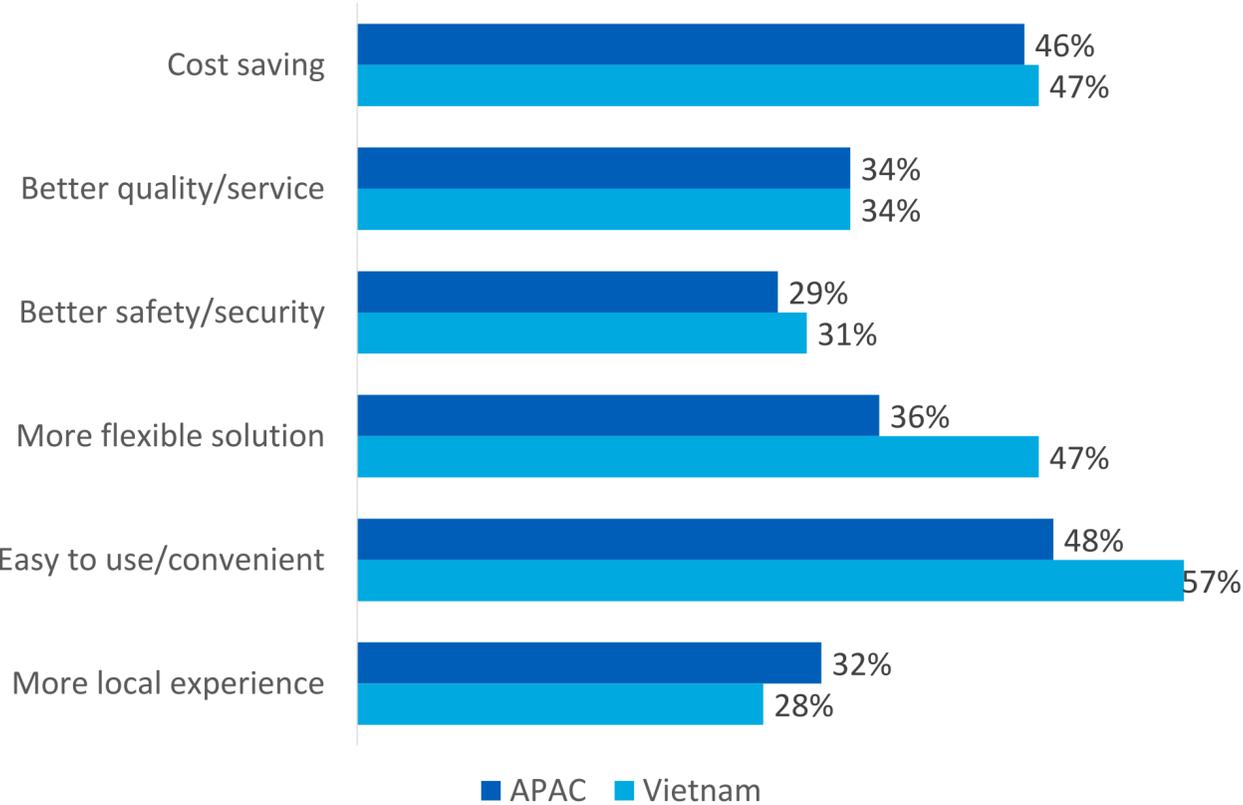
Vietnamese respondents are most likely to use sharing economy apps because they are easy to use/convenient. This is true for both apps for getting around, like Uber (64%), and apps for stays, like Airbnb (57%).



Reasons for using apps to get around during trips



Reasons for using services/apps for stays during trips

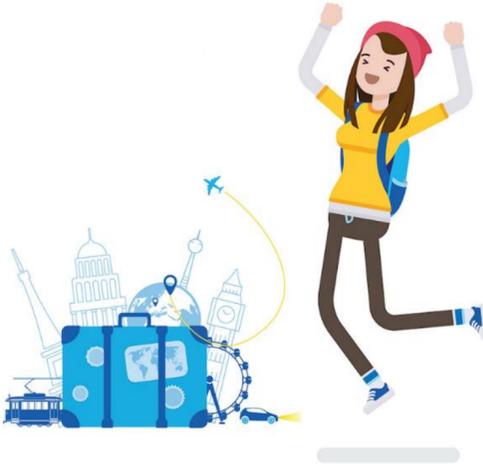


Sample size: 276 (get around the trips), 197 (stays during trips)

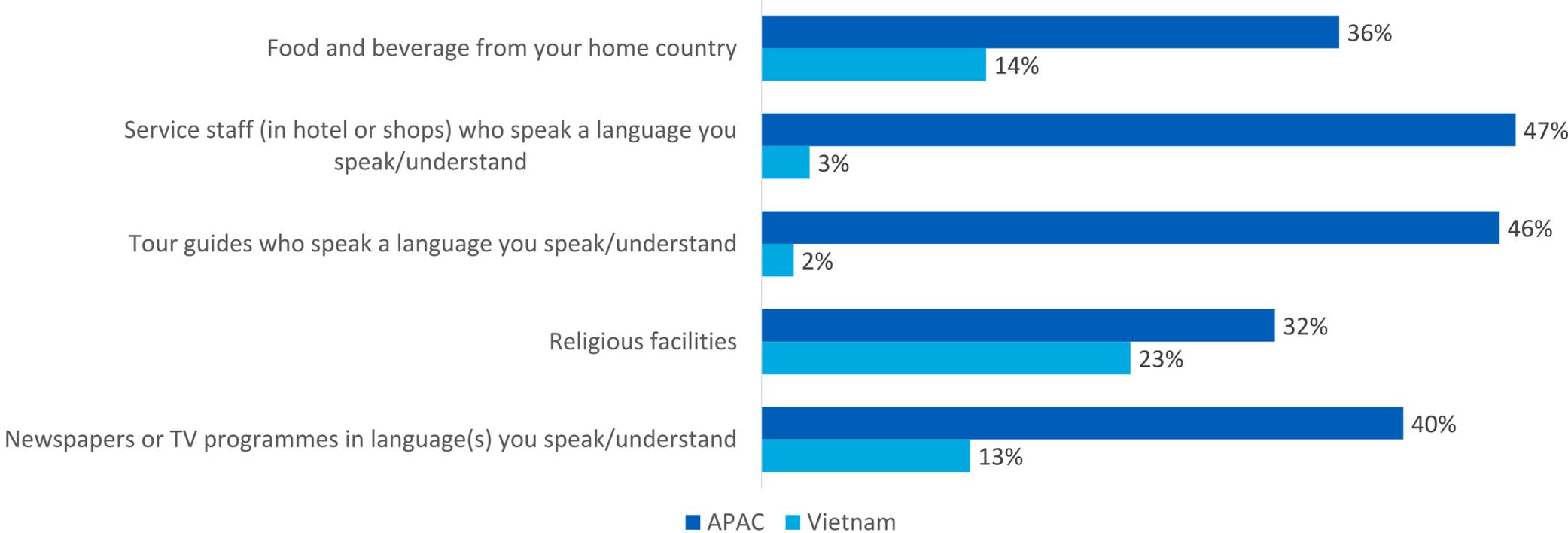
DELIGHT ME

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

Compared to other APAC travellers, Vietnamese respondents place little importance on having tour guides (2%) and service staff (in hotel or shops) (3%) who speak a language they speak/understand compared to 46% and 47% from other APAC travellers. They also didn't place as much importance on finding food/beverages from their home country (14% compared to 36 APAC), religious facilities (23% compared to 32% APAC) and newspapers or TV programmes in a language they understand (13% compared to 40% APAC). This could be due to the fact that they accept that Vietnamese is not spoken widely around the world compared to other languages.



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

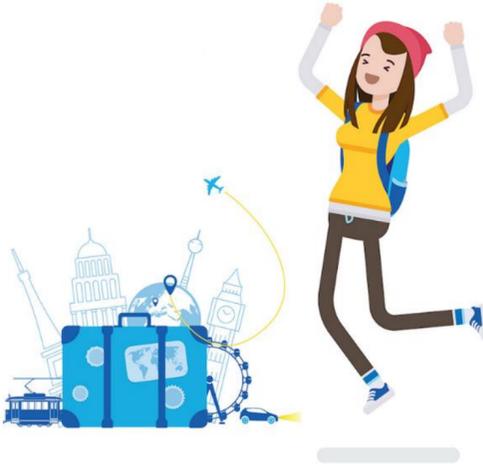


* Percentage of respondents choosing 'Somewhat important' and 'Very important' for each option is presented.

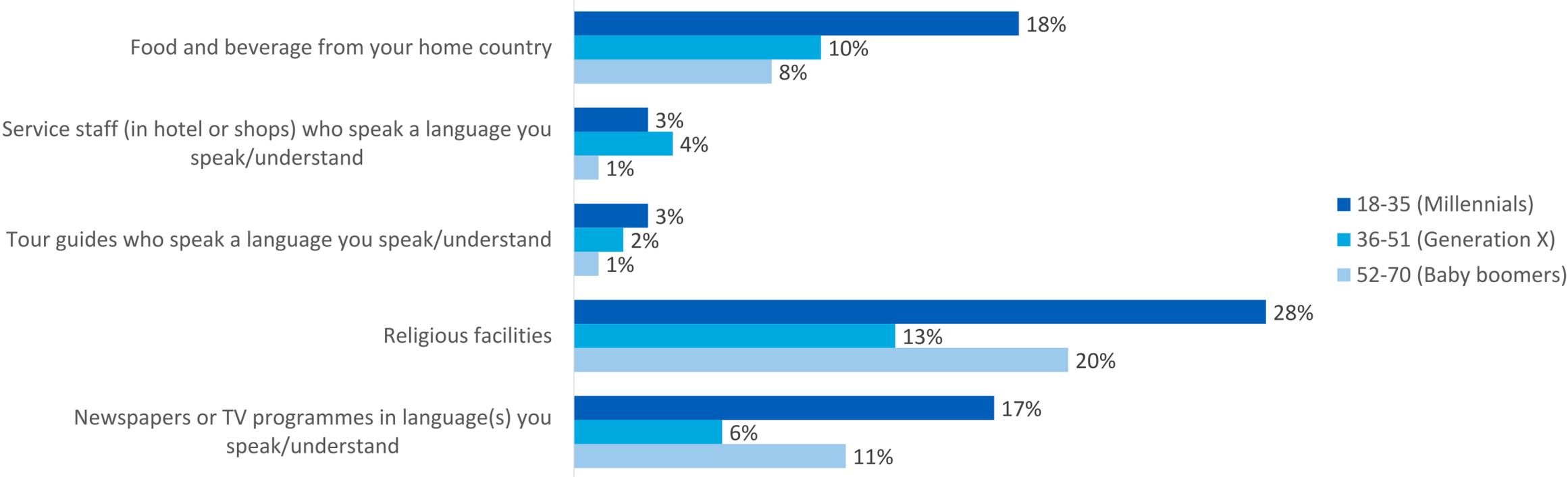
DELIGHT ME

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

Surprisingly, Vietnamese millennials are most interested (28%) in having religious facilities at their destination. Only 13% of generation X respondents place importance on this and just 20% of baby boomers.



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

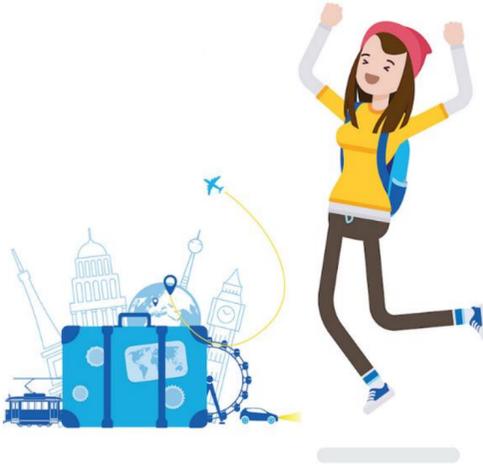


* Percentage of respondents choosing 'Somewhat important' and 'Very important' for each option is presented.

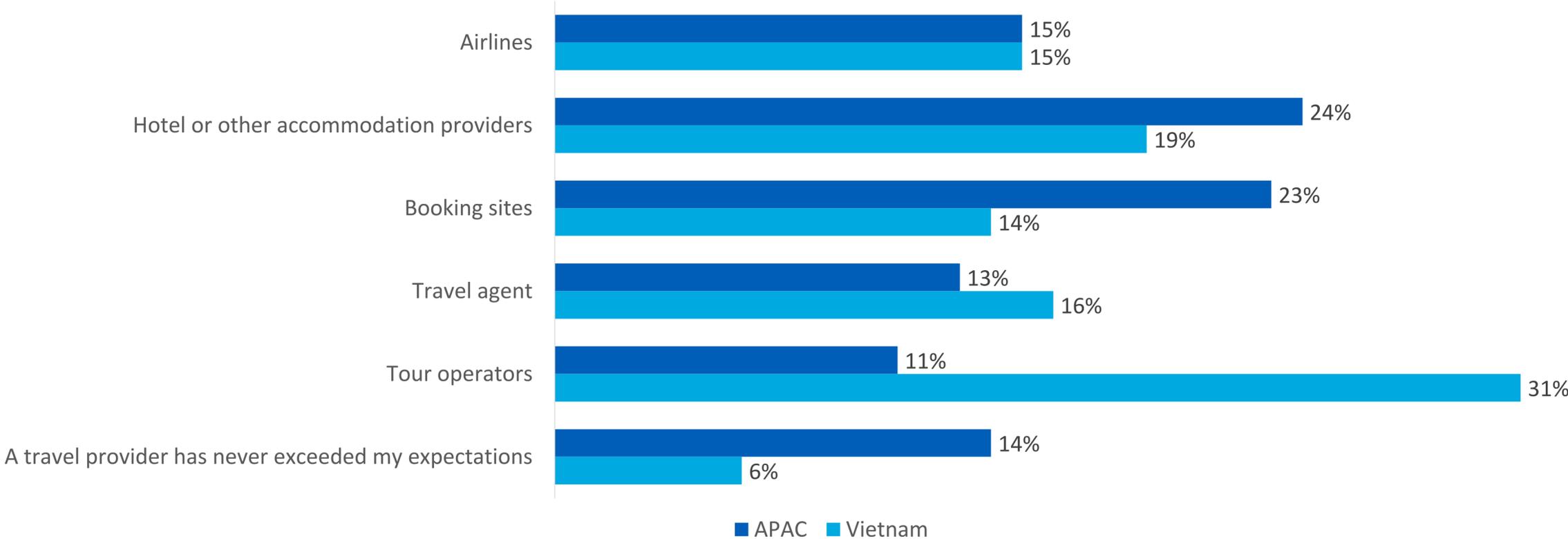
DELIGHT ME

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

94% of Vietnamese travellers stated that a travel provider had exceeded their expectations, which is much higher than the regional average of 86%. Tour operators (31% - 11% in the rest of APAC) and hotel/accommodation providers (19% - 24% in the rest of APAC) impressed respondents the most. Less Vietnamese have had their expectations exceeded by booking sites (14%) compared to the rest of APAC at 23%, and hotel/accommodation providers at 19% compared to 24% in the rest of APAC.



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



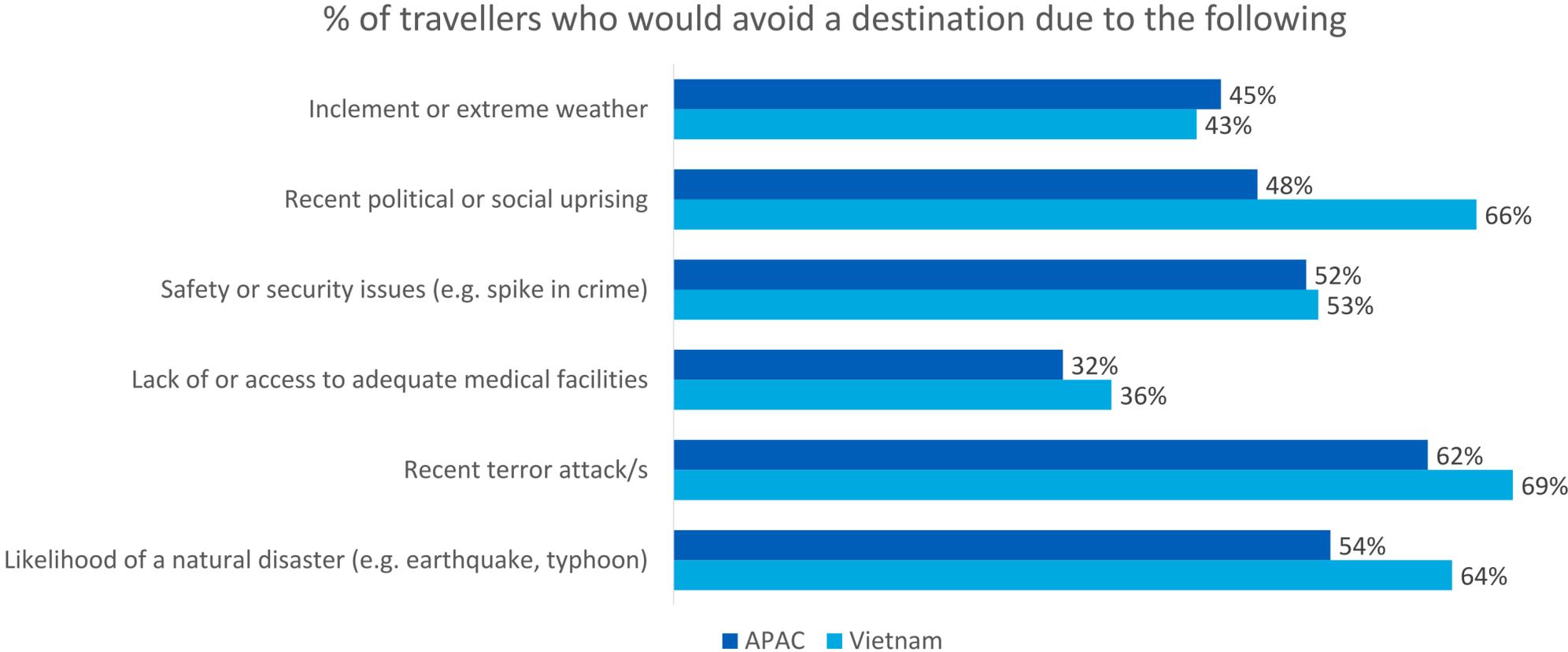
Care for Me
and keep me safe and secure



CARE FOR ME

Q19. On a scale of 1 – 5, how much would each of the following affect your likelihood to travel to a certain destination? (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)

The top reason that Vietnamese travellers would alter their travel plans are recent terror attacks (69%). Many more Vietnamese travellers would consider altering their travel plans in the event of a recent political or social uprising (66%) compared to 48% in APAC. 64% of Vietnamese respondents would also be affected by a recent natural disaster, compared to 54% in APAC.



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

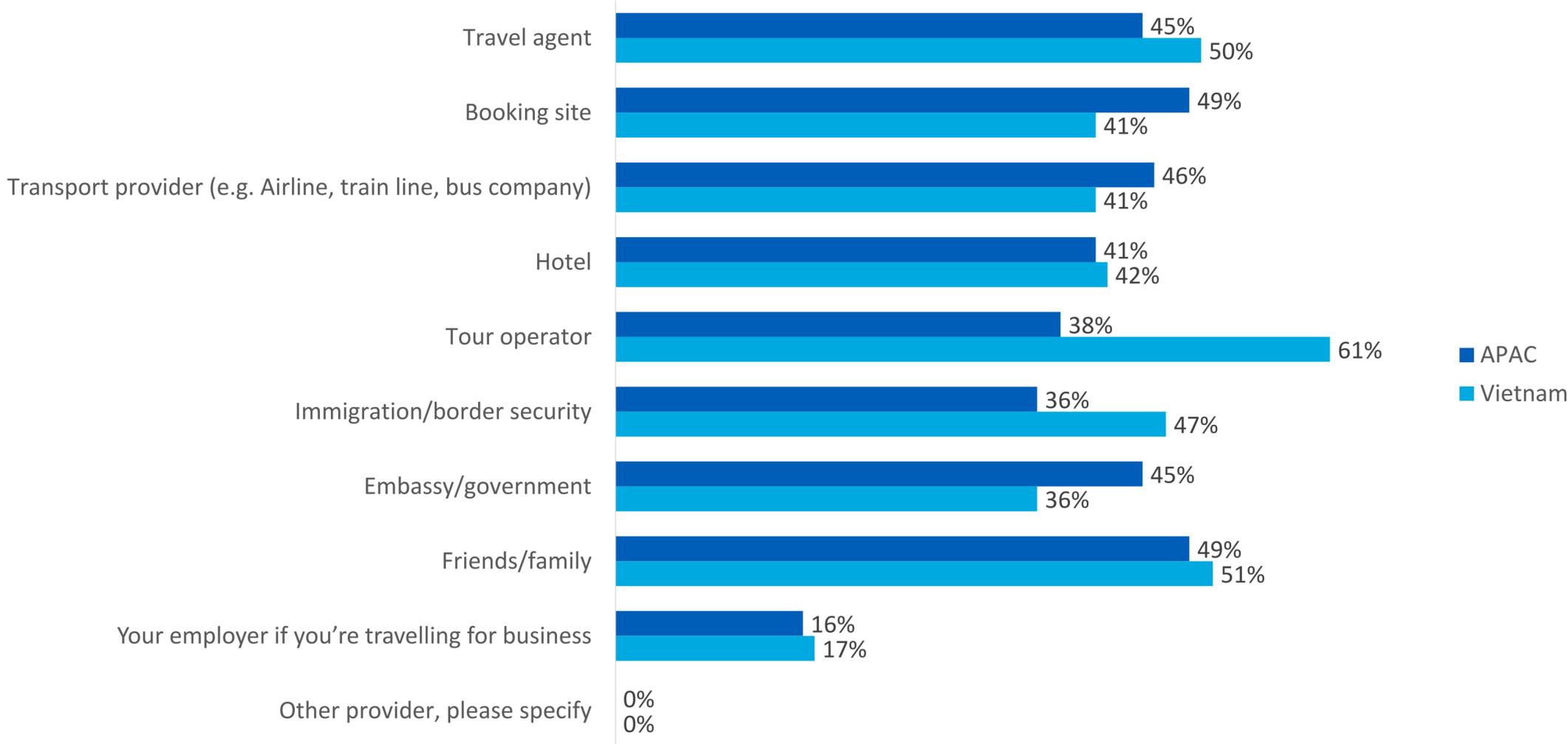


CARE FOR ME

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

Tour operators (61%), friends/family (51%) and travel agents (50%) are the sources that Vietnamese travellers rely on for their security/safety updates. Only 38% of travellers in the rest of APAC consider tour operators the top source.

Preferred sources of safety or security updates



Thank you!

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