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Amadeus Journey of Me Insights

What Asia Pacific travellers want

(Korea report)

Sample size: 400
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. Korean respondents displayed a number of differentiating characteristics – they are relatively high users of mobile for research (60%) and booking (52%) compared to other APAC travellers.

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. Koreans are similar with 65% open to sharing personal information. Interestingly, Korean men are more open to sharing personal information (68%) than Korean women (57%).

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 the online booking websites (e.g. Expedia, Goibibo, Skyscanner, kayak) are the most popular source for Koreans to receive travel-based recommendations (46%). More Korean travellers have received useful recommendations from travel agencies (41%) compared to respondents from other APAC countries (32%).

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 the most popular platform for Korean travellers to receive recommendations about their trips through are travel company apps (e.g. airline apps, hotel apps) (26%).

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SO WHAT DO KOREAN TRAVELLERS WANT?

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

INSPIRE ME about the endless possibilities around travel and technology

CARE FOR ME and keep me safe and secure

Know Me

Care for Me

Inspire Me

Journey of Me

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

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

Delight Me

Connect Me

Bonjour

สวัสดี

こんにちは

Hola

Talk to Me

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

KNOW ME

_ Personalisation or privacy? 65% of Korean travellers are open to sharing personal information with travel service providers. Interestingly, Korean men are more open to sharing personal information (68%) than Korean women (57%).

_ Big screens vs. small screens: Korean travellers are relatively high users of mobile for research (60%) and booking (52%) compared to other APAC travellers. However they still also rely heavily on laptop and desktop computers compared to other travellers. 83% of Koreans use computers for research (vs. 76% regionally) and 79% of Koreans use computers to make bookings (vs. 74%. regionally).

_ Recommendations that matter: Korean travellers are most interested in receiving recommendations that make travel more comfortable (35% vs. 29% APAC) and expose them to new experiences (32% vs. 24% APAC). They are less interested than other APAC travellers in saving money, 30% compared to 37% regionally.

_ Who knows better: Online booking websites (e.g. Expedia, Goibibo, Skyscanner, kayak) (46%) are the most popular source for Koreans to receive travel-based recommendations on, but this is still lower than the APAC average of 50%. More Korean travellers consider that travel agencies have sent useful recommendations (41%) compared to other APAC countries (32%). Only 37% have received useful information from their social network (e.g. Friends/family), which is lower than the regional average (48%).

INSPIRE ME

_ Opportunities to inspire: 33% of Korean travellers do most of their travel planning during the weekends, followed by on weekdays, after work (29%) and during holidays (20%).

_ The influencers: Friends, family and colleagues (word of mouth or through social media) have the greatest influence on trip planning among other channels, followed by online booking or travel sites.

_ New technology: Among other technologies, an augmented reality mobile app (score 1.3 out of 3) interests respondents the most, followed by virtual reality (score 1.3 out of 3), which is higher than the regional average.

CONNECT ME

_ Reasons to stay connected: Accessing maps and location information is the top reason that Korean respondents stay connected when they travel (48%). Note using convenience apps (15%) and researching things to do at the destination (36%) are less popular reasons compared with the regional average (34%, 49%).

_ How to get connected: Most Korean respondents use Wi-Fi (60%) to stay connected when they are travelling abroad, followed by international roam-as-you-go service (56%), which is higher than the regional average (33%). The option of local sim cards purchased at the destination is lower (30%) than in the rest of APAC (43%) and it's also less common that they use international roaming packages purchases before leaving their home country (24% vs. 36%).

_ Apps that add value: Google Maps (17%), Hana Tour (7%) and Google (7%) are the top 3 mobile apps used by Koreans while travelling.

TALK TO ME

_ A good time to 'talk': Korean travellers are most interested in receiving travel-based recommendations when they are first considering taking a trip (95%) and when they are evaluating travel options (92%).

_ "You can reach me via…": Most Korean respondents prefer to receive updates or recommendations about their trips through apps by travel companies (e.g. airline apps, hotel apps) (26% which is higher than the regional average of 19%), followed by email (25%) which is lower than the regional average (35%).

DELIGHT ME

_ **Speak my language:** Among all the choices, religious facilities were relatively more important to Koreans (54%) as compared to the regional average (32%). It is interesting that Koreans do not rely on other options, especially service staff (6%) or tour guides (8%) who speak a language they speak/understand, compared with the regional averages (47%, 46%).

_ **New world, new options:** More than 65% of Korean respondents seldom or have never used the sharing economy apps and services mentioned in the survey, either for getting around (74%), which is higher than the regional average (64%) or for their stays during a trip (69% vs. 71% APAC).

_ **Great expectations:** Those Koreans who feel that their expectations have been exceeded by travel providers were mainly impressed by hotel or accommodation providers (27%), slightly above the APAC average of 24%.

CARE FOR ME

_ **Travel stoppers:** Koreans are generally more sensitive to adverse incidents when considering travel to a certain destination compared with the regional average. Recent terror attack/s have the greatest effect (74% compared to 62% APAC wide) on the likelihood of people travelling to certain destinations, while safety or security issues are the second factor that affects their decision. (66% - 52% APAC). After the Philippines , they are the country least likely to travel in the aftermath of terrorism.

_ **Safety updates:** Travel agents (57%) are the top channel that Koreans prefer to receive safety or security updates from at their destination, which is higher than the regional average. It is interesting that only 19% of them prefer transport providers as their source, which is much lower than the regional average (46%).

Demographic overview
Who we surveyed

DEMOGRAPHIC OVERVIEW
A snapshot

Gender

Female 38%
Male 62%

Age

18 to 24 48%
25 to 34 25%
35 to 44 14%
45 to 54 7%
55 + 6%
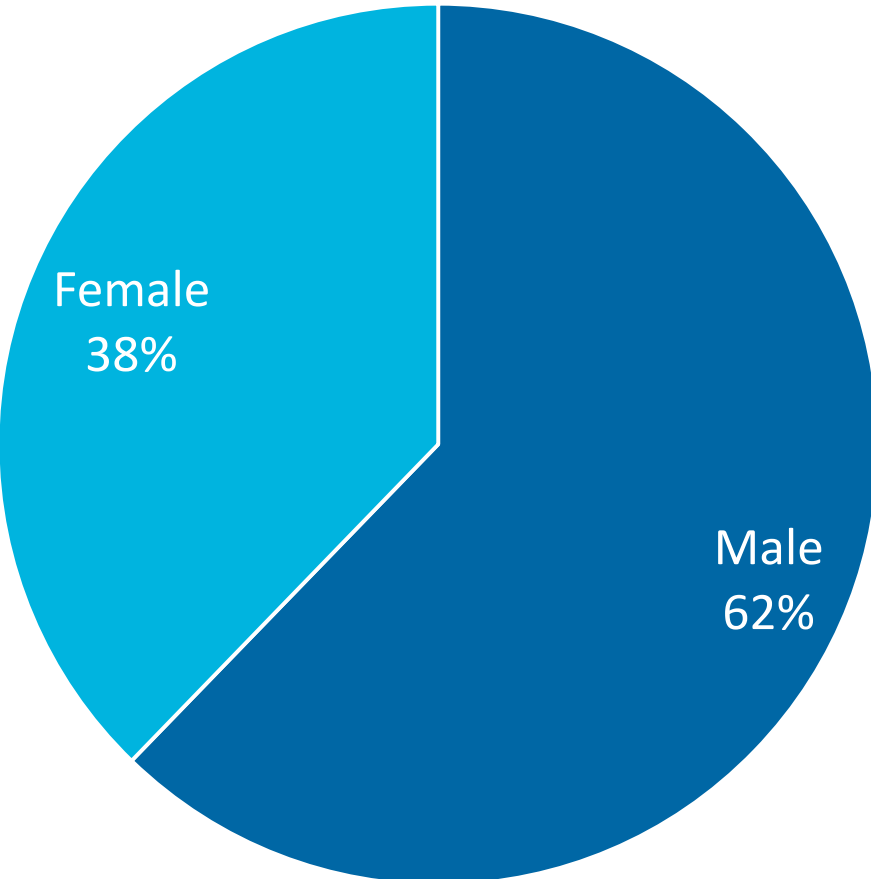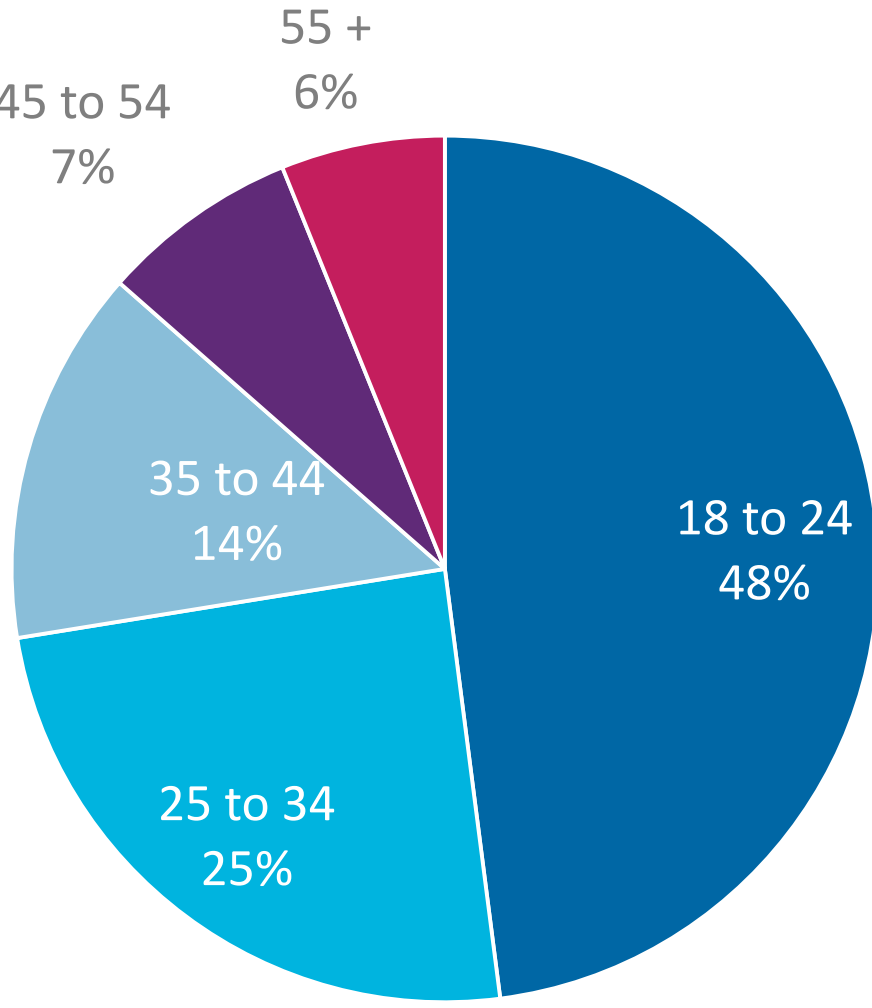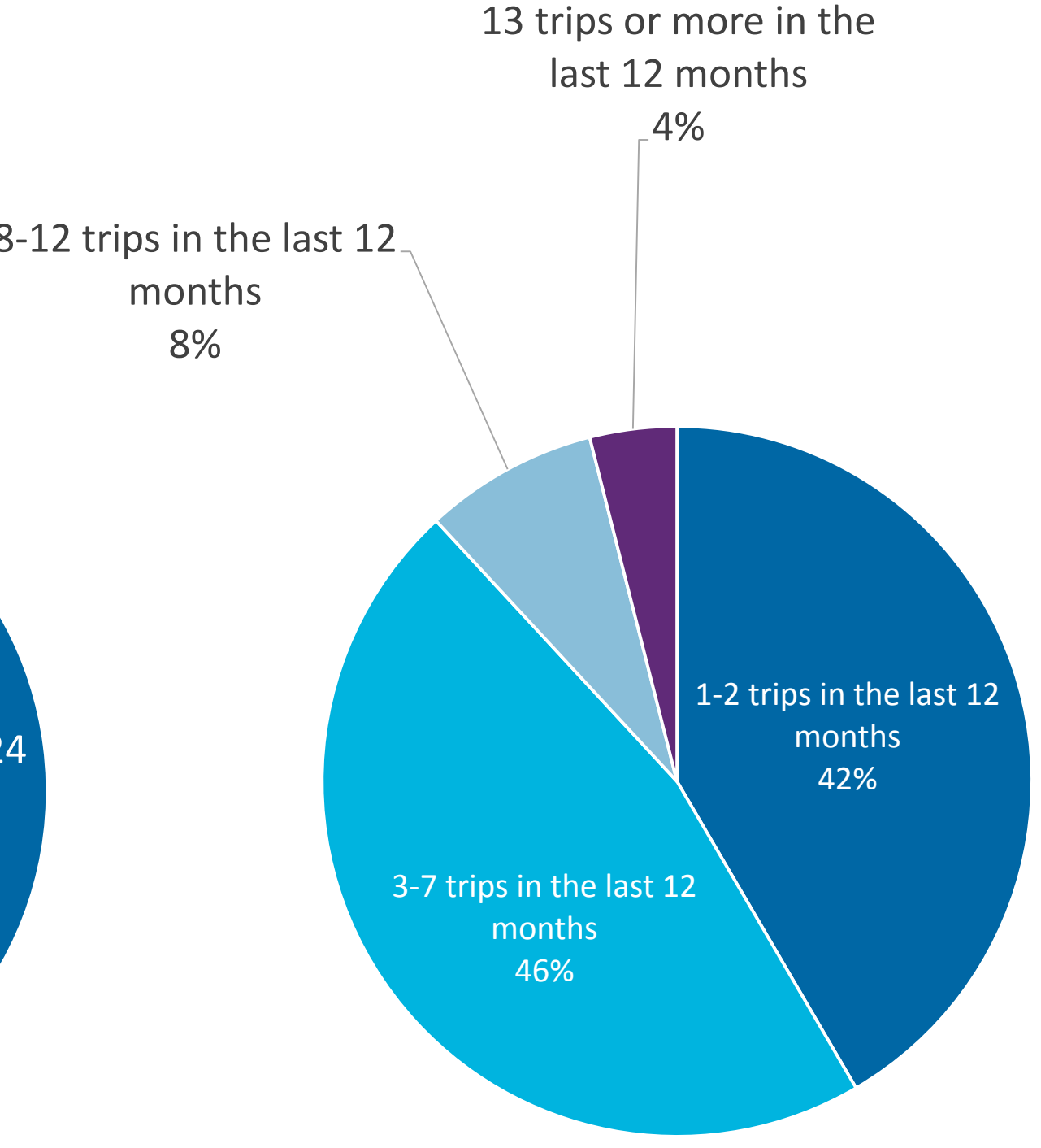
Travel frequency
(number of trips made in the past 12 months)

1-2 trips in the last 12 months 42%
3-7 trips in the last 12 months 46%
8-12 trips in the last 12 months 8%
13 trips or more in the last 12 months 4%
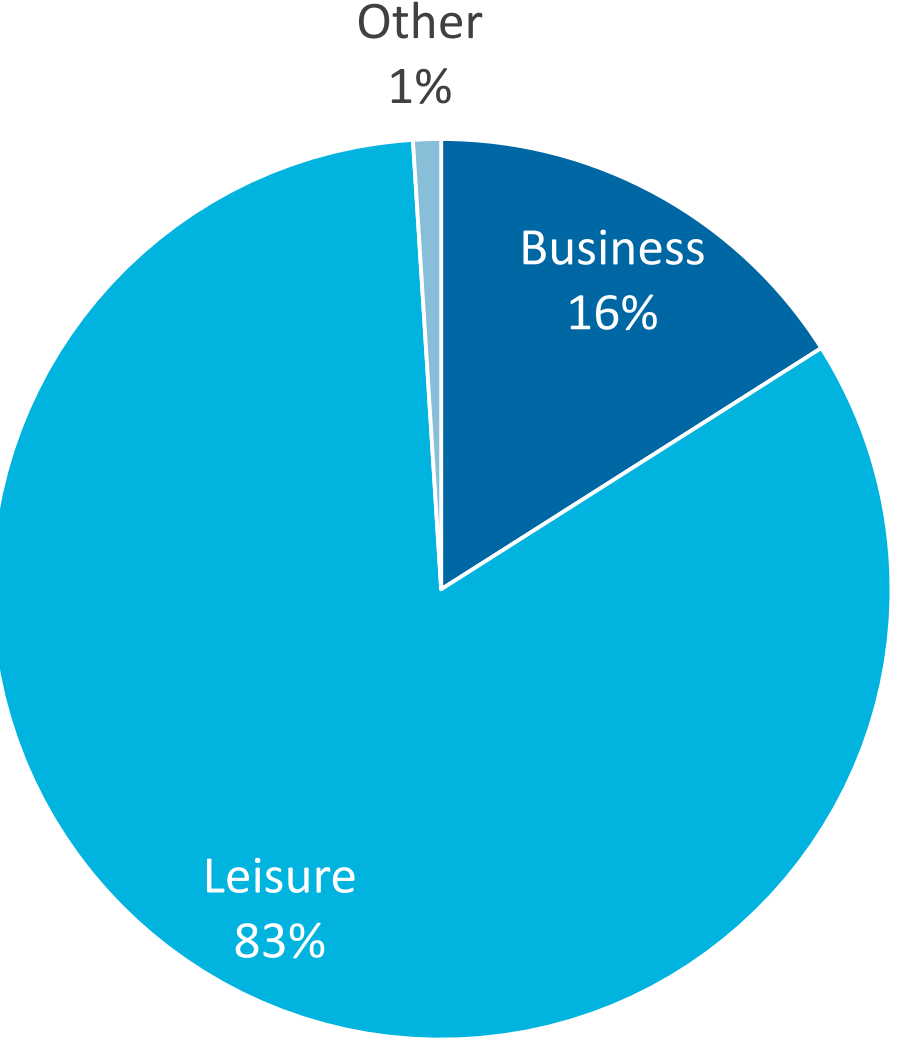
Primary reason for travel

Business 16%
Leisure 83%
Other 1%

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.*

Korean travellers are relatively high users of mobile for researching (60%) and booking (52%) their trips compared to other APAC travellers. However they still also rely heavily on laptop and desktop computers compared to other travellers. 83% use computers for research (vs. 76% regionally) and 79% use computers for bookings (vs. 74% regionally).

Research your trip

Device	APAC	Korea
Laptop/desktop computer	76%	83%
Mobile phone	54%	60%
Tablet	21%	22%
I get someone else to do it for me (e.g. a travel agency)	8%	7%

■ APAC ■ Korea

Book your trip

Device	APAC	Korea
Laptop/desktop computer	74%	79%
Mobile phone	46%	52%
Tablet	16%	15%
I get someone else to do it for me (e.g. a travel agency)	12%	13%

■ APAC ■ Korea
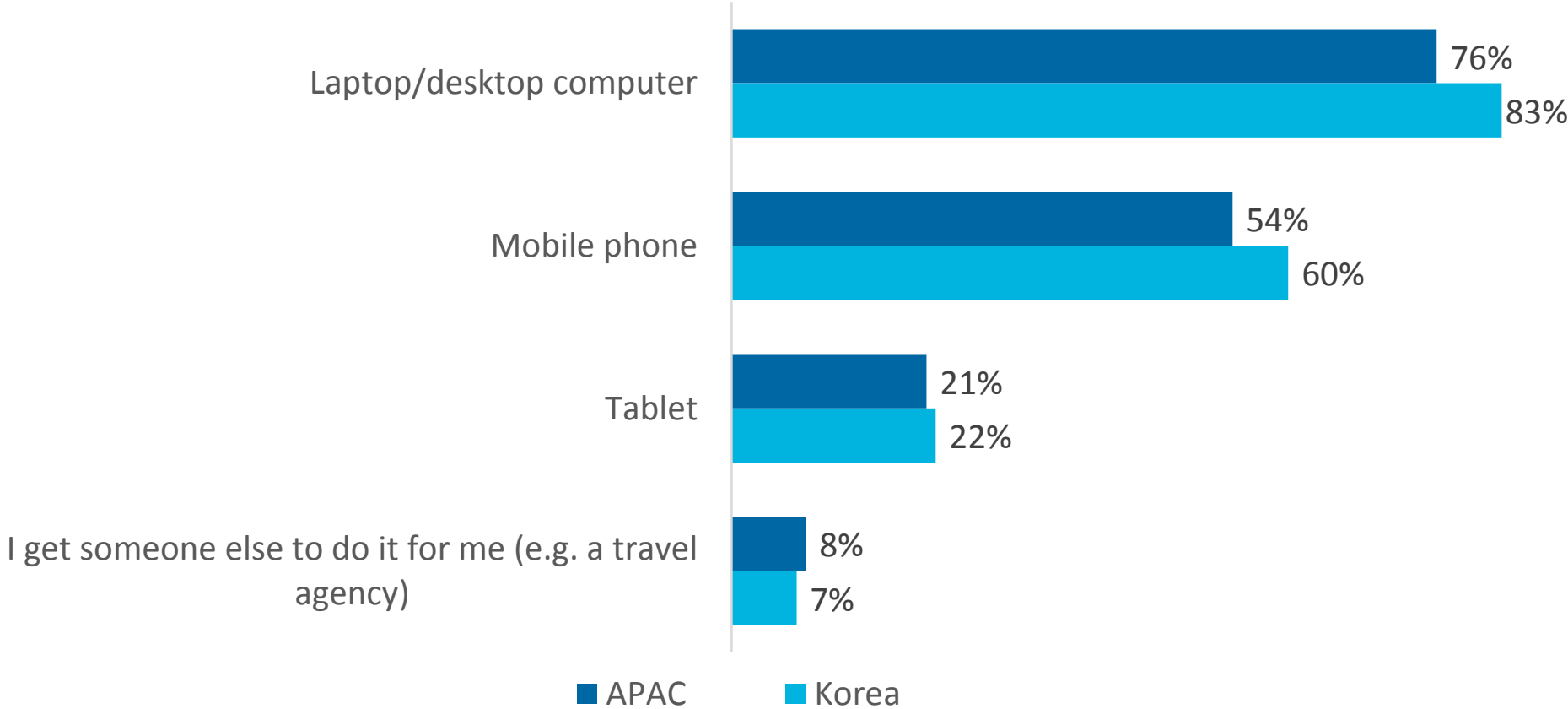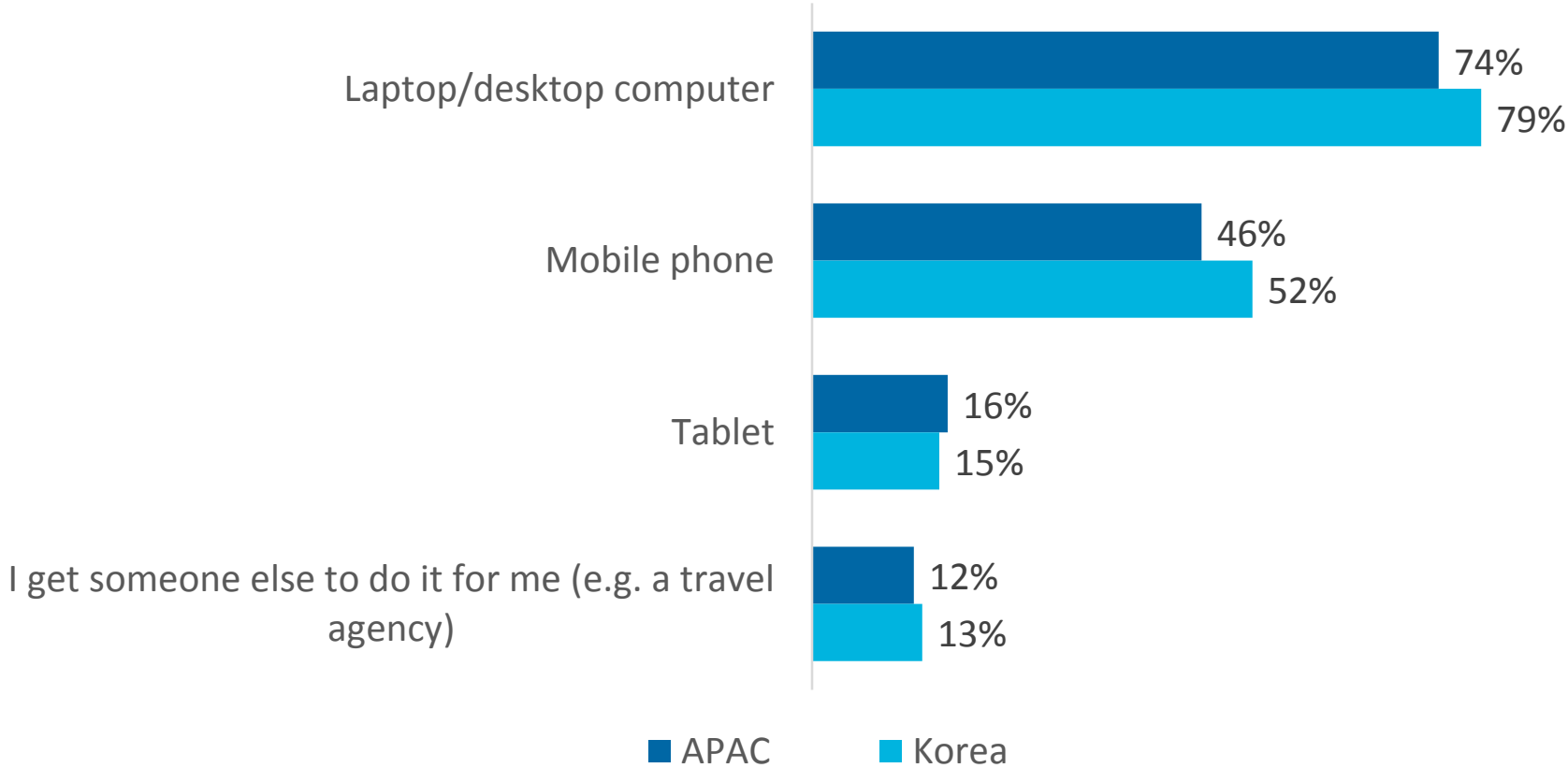
KNOW ME

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

61% of Koreans book their flight at the same time as their transport or accommodation compared to the 36% regional average. Only 18% of Koreans book it in advance of transportation (compared to 35% regionally) and 20% after booking their flight or transport (vs. 27% regionally).

When do travellers book accommodation

In advance of booking the flight/transport	35% / 18%
At the same time when I'm booking the flight/transport	36% / 61%
After booking the flight/transport, but before departure	27% / 20%
After landing or reaching the destination	2% / 1%

■ APAC ■ Korea

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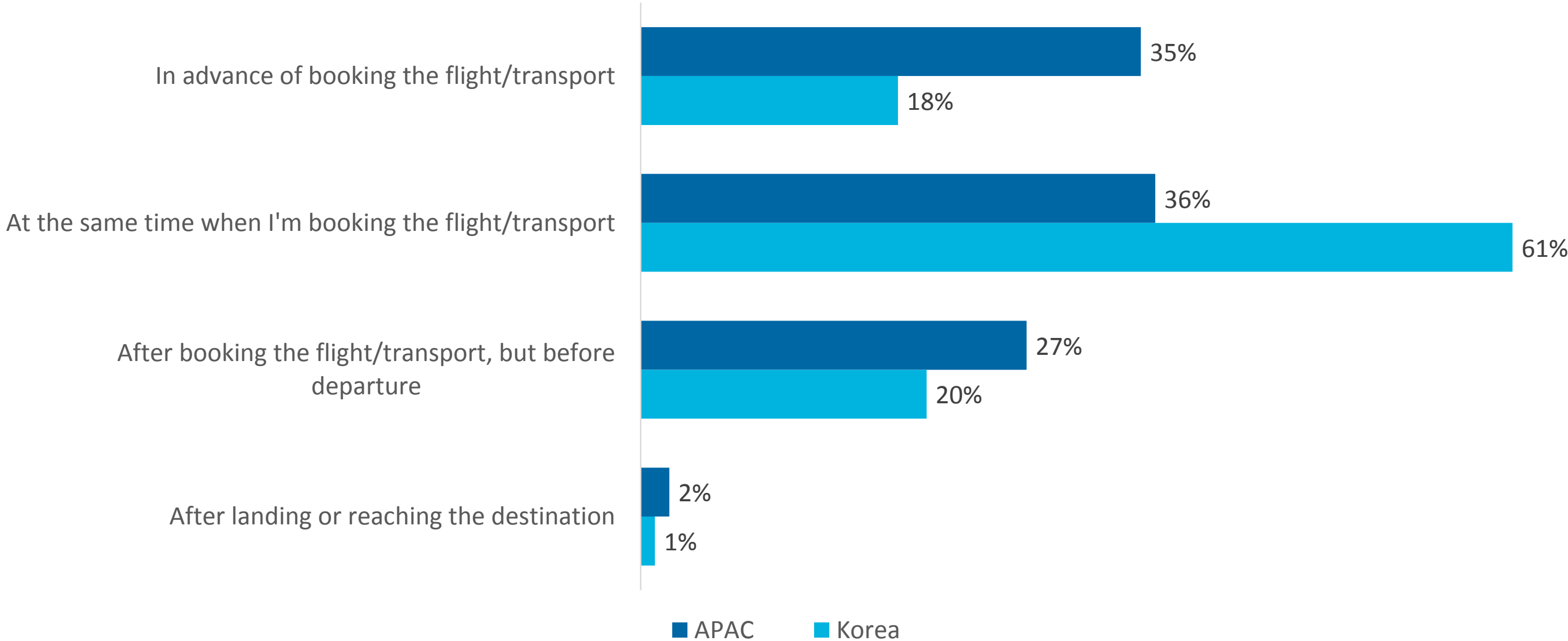
KNOW ME

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

Korean travellers are most interested in receiving recommendations that make travel more comfortable (35% vs. 29% APAC) and expose them to new experiences (32% vs. 24% APAC). They are less interested than other APAC travellers in saving money, 30% compared to 37% regionally.

Most useful recommendations for leisure travel

Recommendation	APAC	Korea
Recommendations that help me save money	37%	30%
Recommendations that make my travel more comfortable	29%	35%
Recommendations that help me save time	17%	14%
Recommendations that help me identify the best sightseeing options	28%	30%
Recommendations that ensure my safety	27%	19%
Recommendations that help me plan my itinerary	27%	31%
Recommendations that expose me to new experiences	24%	32%
Other, please specify	0%	0%

■ APAC ■ Korea

KNOW ME

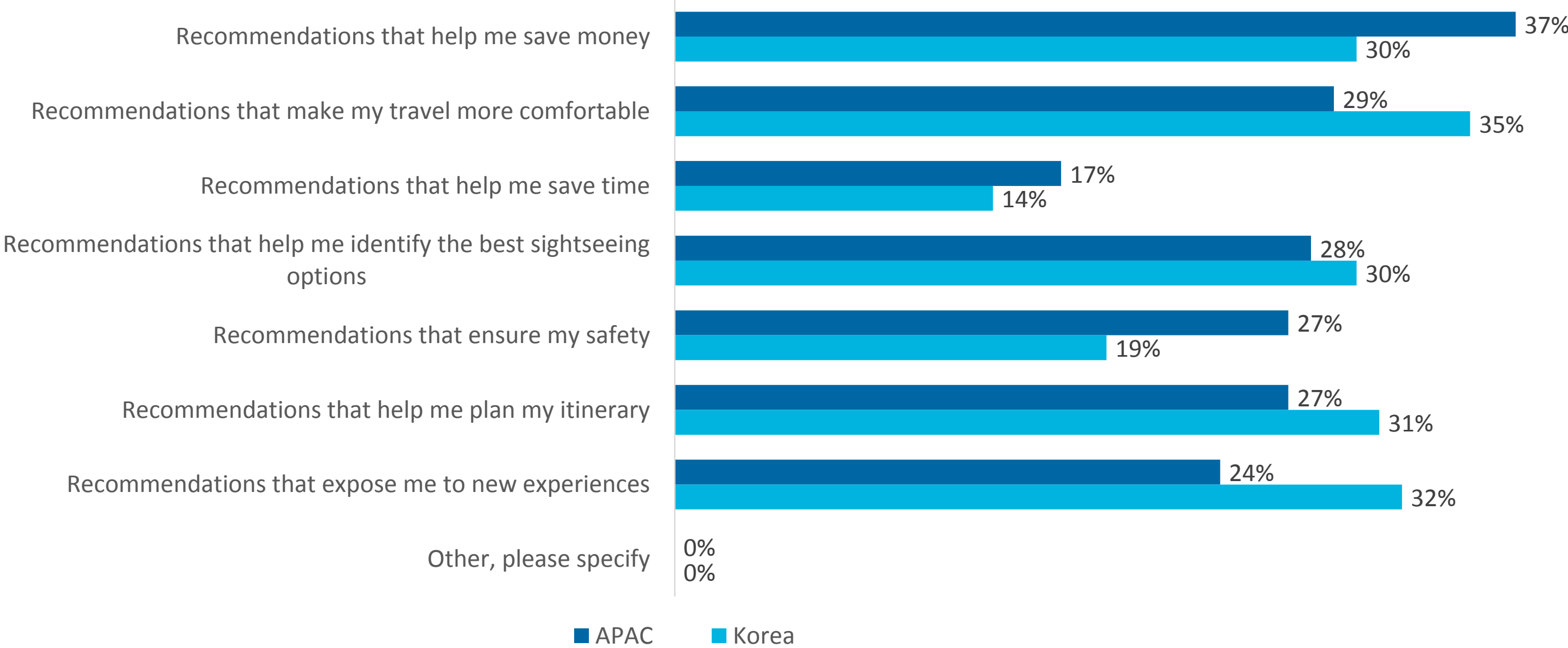## (Continued) Q3. When you travel for leisure, what types of travel recommendations do you find most useful? *Please select the top two.*

Baby boomers are most interested in receiving recommendations for sightseeing (39%) compared to 24% of millennials and 28% of gen X.

Most useful recommendations for leisure travel

Recommendation	18-35 (Millennials)	36-51 (Generation X)	52-70 (Baby boomers)
Recommendations that help me save money	27%	31%	32%
Recommendations that make my travel more comfortable	31%	34%	40%
Recommendations that help me save time	17%	16%	8%
Recommendations that help me identify the best sightseeing options	24%	28%	39%
Recommendations that ensure my safety	19%	21%	15%
Recommendations that help me plan my itinerary	32%	28%	33%
Recommendations that expose me to new experiences	37%	34%	26%
Other, please specify	0%	0%	0%

- ■ 18-35 (Millennials)
- ■ 36-51 (Generation X)
- ■ 52-70 (Baby boomers)

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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*

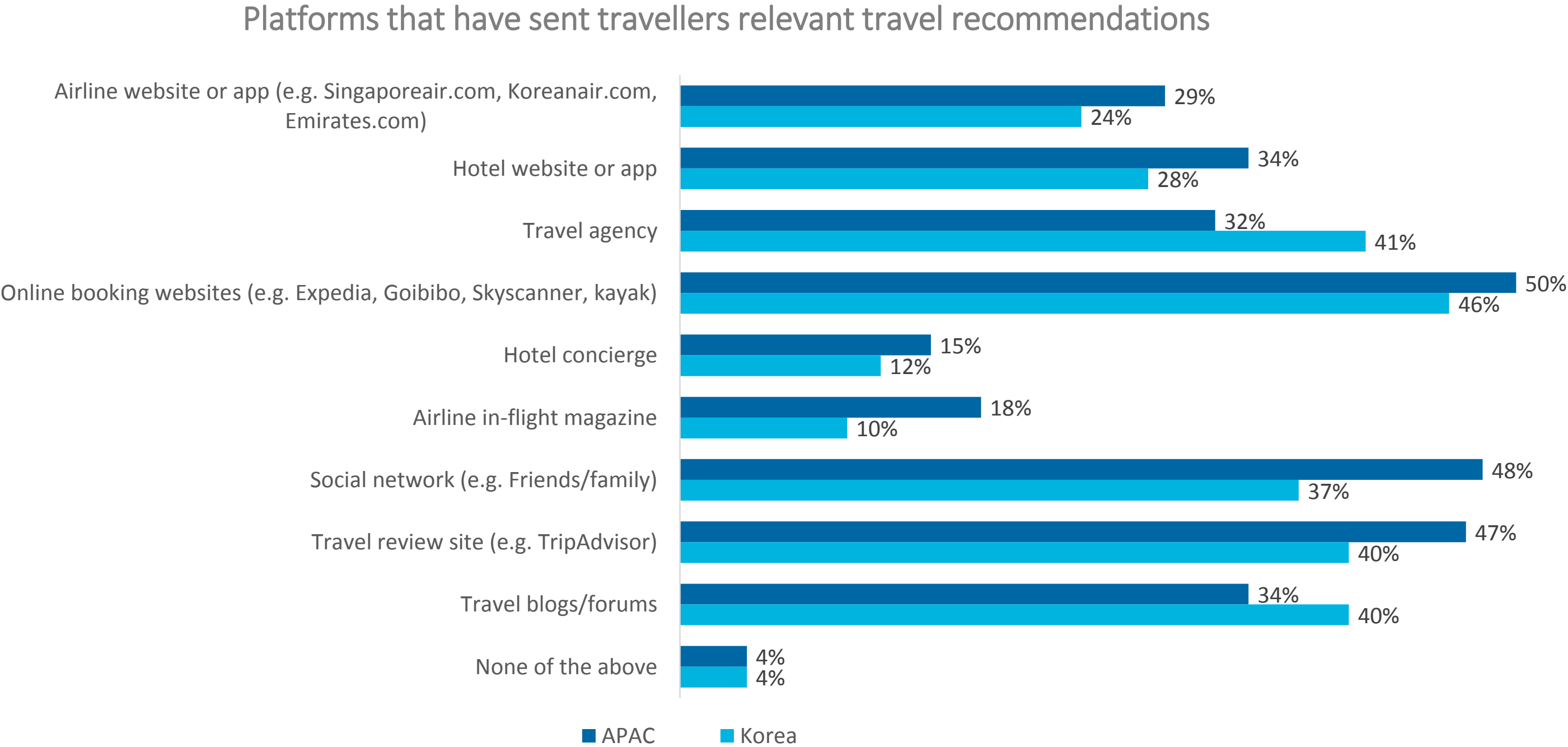Online booking websites (e.g. Expedia, Goibibo, Skyscanner, kayak) (46%) are the most popular source for Koreans to receive travel-based recommendations on, but this is still lower than the APAC average of 50%. More Korean travellers consider that travel agencies have sent useful recommendations (41%) compared to other APAC countries (32%). Only 37% have received the information from their social network (e.g. friends and family), which is lower than the regional average (48%).

Platforms that have sent travellers relevant travel recommendations

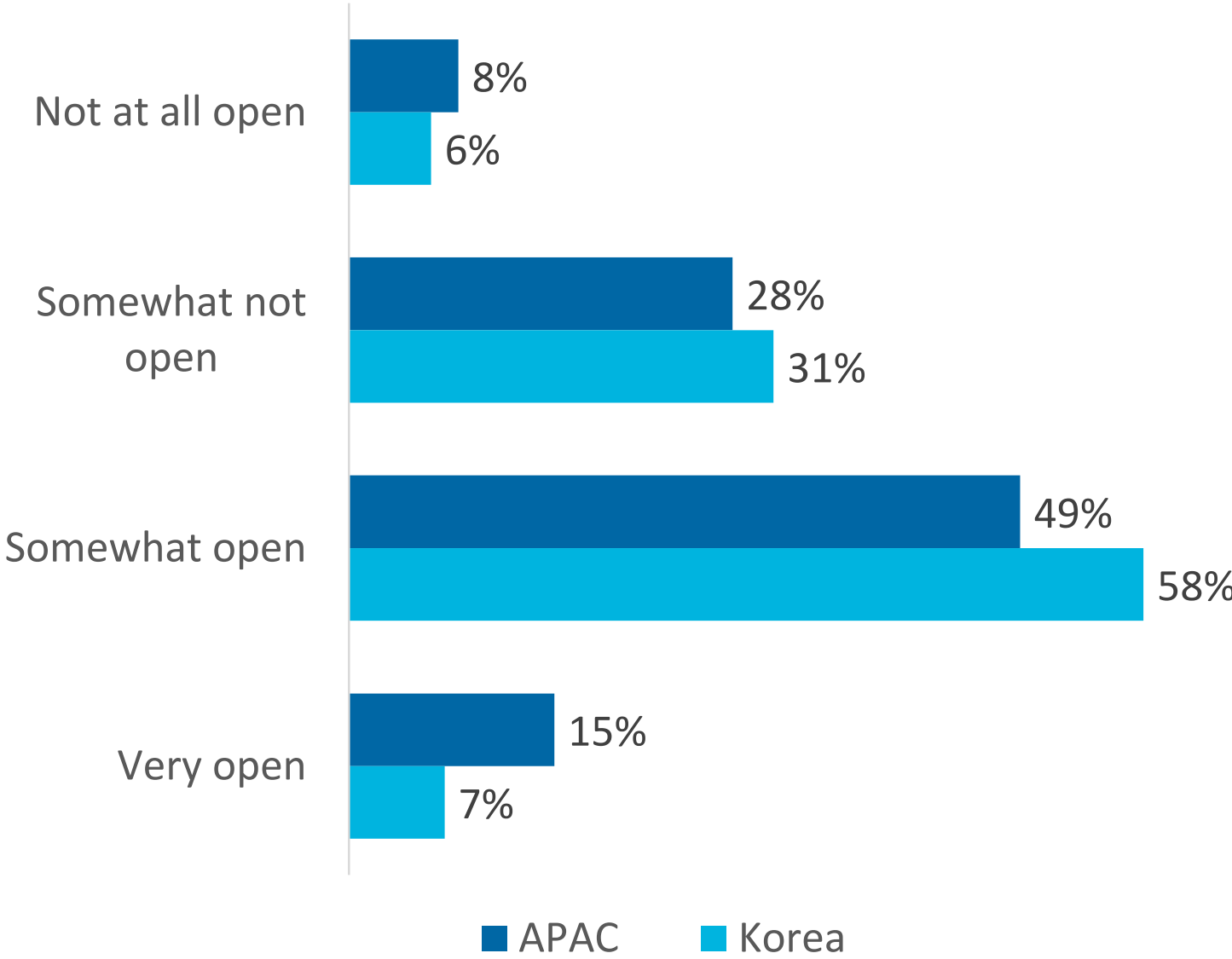| Platform	APAC	Korea
Airline website or app (e.g. Singaporeair.com, Koreanair.com, Emirates.com)	29%	24%
Hotel website or app	34%	28%
Travel agency	32%	41%
Online booking websites (e.g. Expedia, Goibibo, Skyscanner, kayak)	50%	46%
Hotel concierge	15%	12%
Airline in-flight magazine	18%	10%
Social network (e.g. Friends/family)	48%	37%
Travel review site (e.g. TripAdvisor)	47%	40%
Travel blogs/forums	34%	40%
None of the above	4%	4%

■ APAC   ■ Korea

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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?

65% of Koreans are open to sharing personal information with travel service providers. Interestingly, male travellers are more open to sharing personal information (68%) compared to female travellers (57%).

Openness to sharing personal information with travel providers

	APAC	Korea
Not at all open	8%	6%
Somewhat not open	28%	31%
Somewhat open	49%	58%
Very open	15%	7%

By gender

	Male	Female
Not at all open	5%	6%
Somewhat not open	26%	38%
Somewhat open	62%	50%
Very open	6%	7%
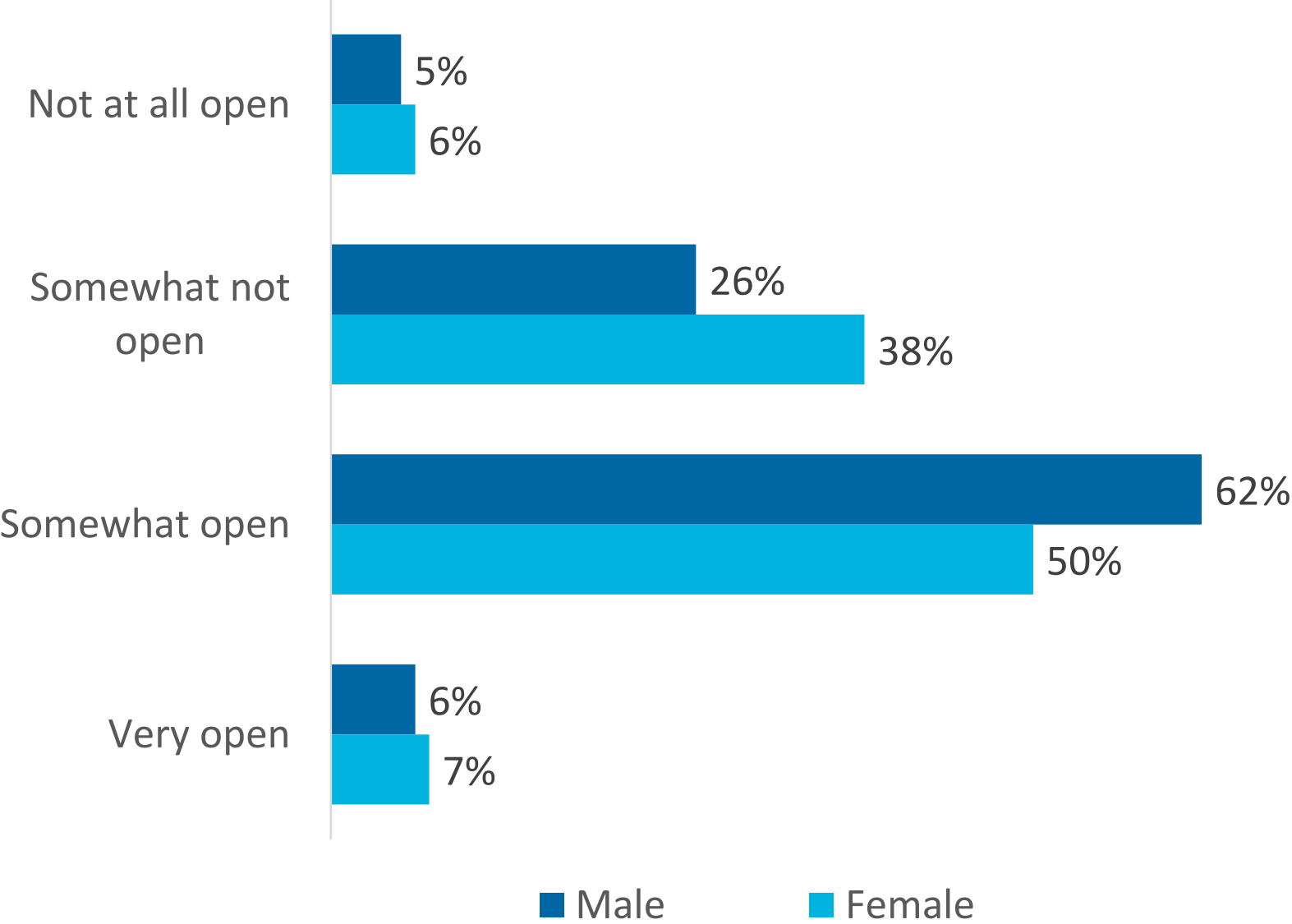
Inspire Me
about the endless possibilities around travel and technology

INSPIRE ME

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

In general, 33% of Korean respondents do most of their travel planning during the weekends, followed by other popular options like during weekdays, after work (29%) and during holidays (20%).

When travellers plan their travels

Category	APAC	Korea
When you're commuting from one place to another	5%	2%
During the weekends	32%	33%
While you're at work	14%	15%
Weekdays, after work	22%	29%
While you are on holiday	25%	20%
Others, please specify	2%	1%

■ APAC ■ Korea
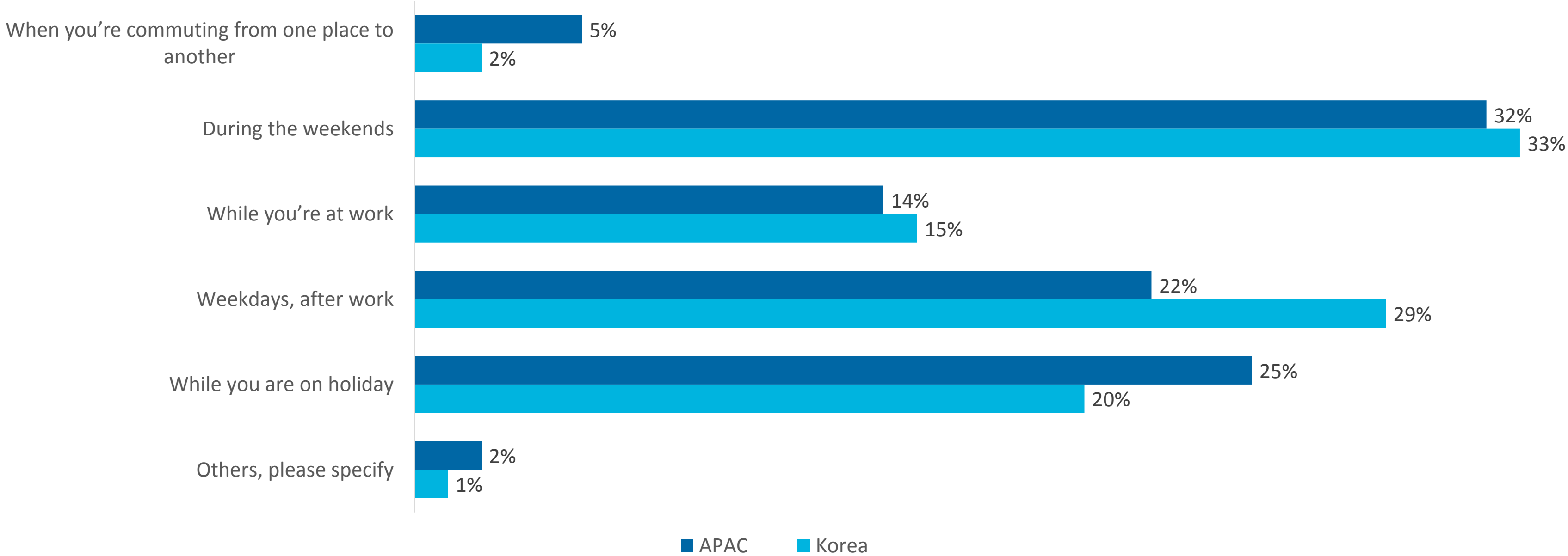
INSPIRE ME

(Continued) Q6. When do you do most of your travel planning?

Understandably more business travellers do their research while at work (40%) compared to leisure travellers who do it at the weekend (34%) or weekdays after work (32%).

When travellers plan their travels

	For business	For leisure
When you're commuting from one place to another	2%	2%
During the weekends	27%	34%
While you're at work	40%	11%
Weekdays, after work	16%	32%
While you are on holiday	14%	21%
Others, please specify	2%	1%

■ For business ■ For leisure

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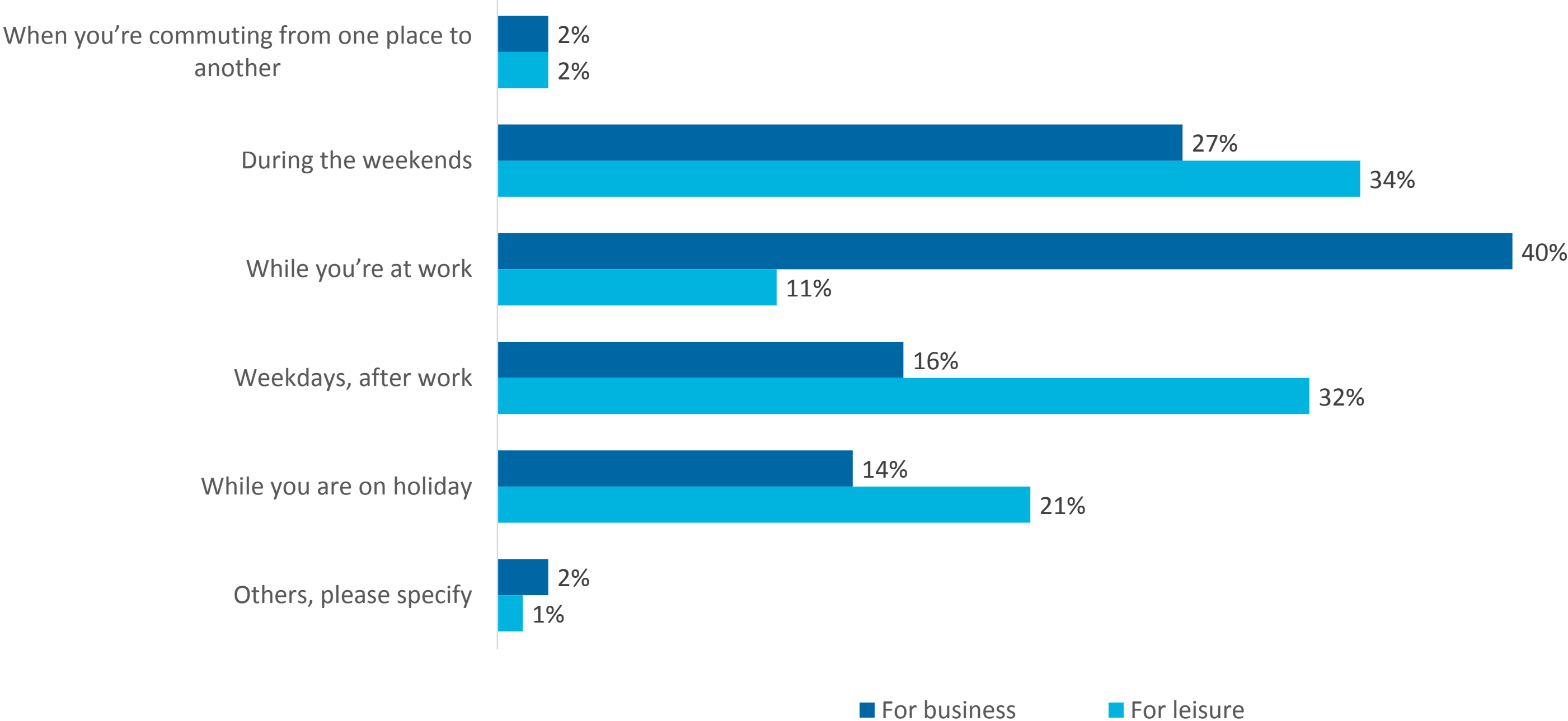
INSPIRE ME

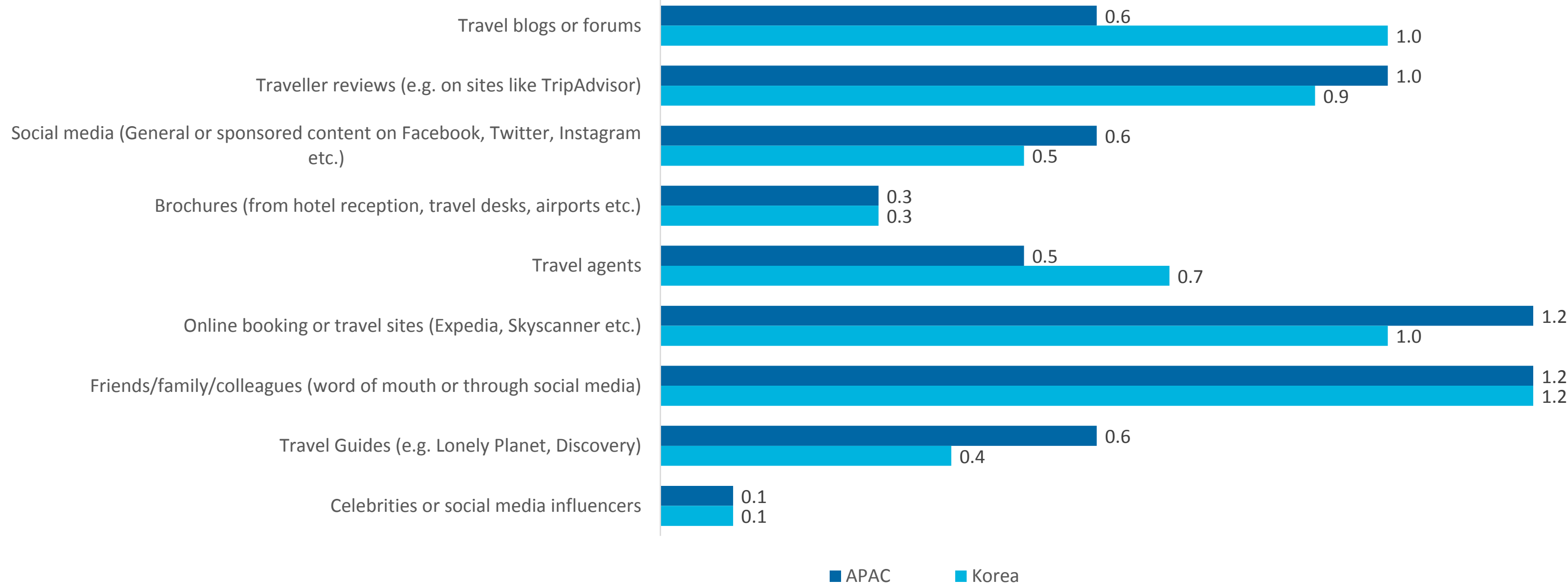## Q7. When it comes to planning your trip (looking for destinations, places to stay, activities to do etc.), which three of the following influence you the most?
Rank in order of influence – from highest to lowest

Friends, family and colleagues (either through word of mouth or through social media) have the greatest influence on trip planning (score 1.2 out of 3), followed by online booking or travel sites (score 1.0 out of 3). Korean travellers rely more than others on travel agents (0.7 compared to 0.5 regionally). They are also a lot more reliant on travel blogs and forums (1.0) than the regional average (0.6).

Sources that influence travellers' trip planning

Source	APAC	Korea
Travel blogs or forums	0.6	1.0
Traveller reviews (e.g. on sites like TripAdvisor)	1.0	0.9
Social media (General or sponsored content on Facebook, Twitter, Instagram etc.)	0.6	0.5
Brochures (from hotel reception, travel desks, airports etc.)	0.3	0.3
Travel agents	0.5	0.7
Online booking or travel sites (Expedia, Skyscanner etc.)	1.2	1.0
Friends/family/colleagues (word of mouth or through social media)	1.2	1.2
Travel Guides (e.g. Lonely Planet, Discovery)	0.6	0.4
Celebrities or social media influencers	0.1	0.1

■ APAC ■ Korea

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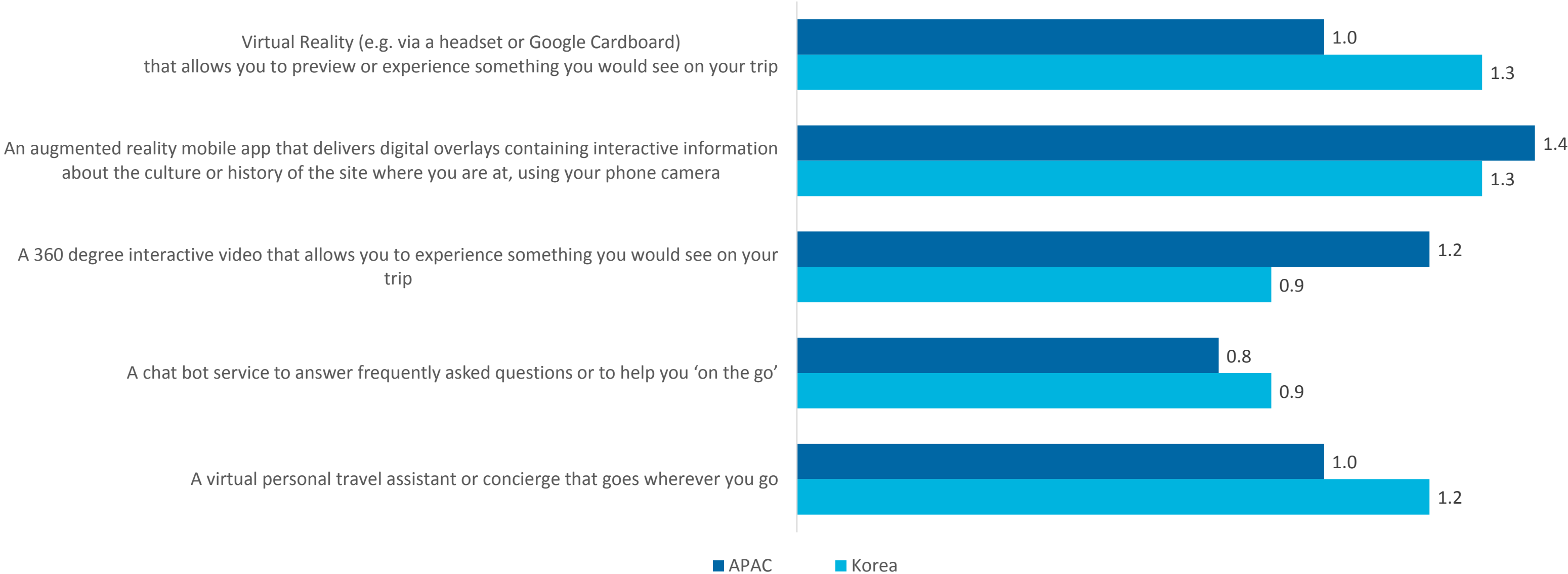
INSPIRE ME

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, an augmented reality mobile app (score 1.3 out of 3) interests respondents the most, followed by virtual reality (score 1.3 out of 3), which is higher than the regional average.

New technologies travellers are most interested in

Technology	APAC	Korea
Virtual Reality (e.g. via a headset or Google Cardboard) that allows you to preview or experience something you would see on your trip	1.0	1.3
An augmented reality mobile app that delivers digital overlays containing interactive information about the culture or history of the site where you are at, using your phone camera	1.4	1.3
A 360 degree interactive video that allows you to experience something you would see on your trip	1.2	0.9
A chat bot service to answer frequently asked questions or to help you 'on the go'	0.8	0.9
A virtual personal travel assistant or concierge that goes wherever you go	1.0	1.2

■ APAC ■ Korea

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

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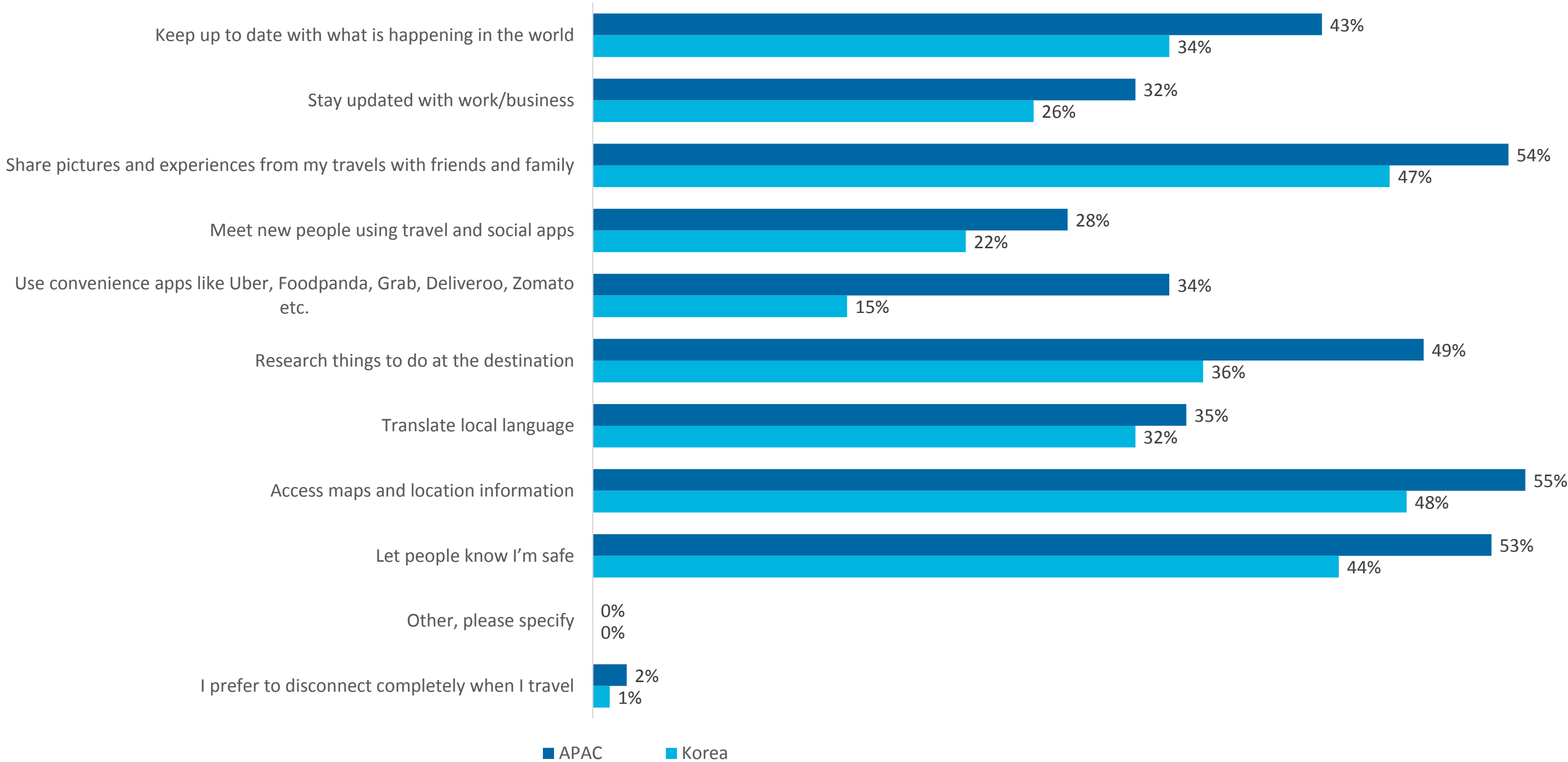so I can stay in touch with what's important to me

CONNECT ME

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

Accessing maps and location information is the top reason that Korean respondents stay connected when they travel (48%). Interestingly, using convenience apps (15%) and researching things to do at the destination (36%) are less popular reasons for Korean travellers compared with the regional average (34%, 49%).

Why travellers want to stay connected when travelling

Category	APAC	Korea
Keep up to date with what is happening in the world	43%	34%
Stay updated with work/business	32%	26%
Share pictures and experiences from my travels with friends and family	54%	47%
Meet new people using travel and social apps	28%	22%
Use convenience apps like Uber, Foodpanda, Grab, Deliveroo, Zomato etc.	34%	15%
Research things to do at the destination	49%	36%
Translate local language	35%	32%
Access maps and location information	55%	48%
Let people know I'm safe	53%	44%
Other, please specify	0%	0%
I prefer to disconnect completely when I travel	2%	1%

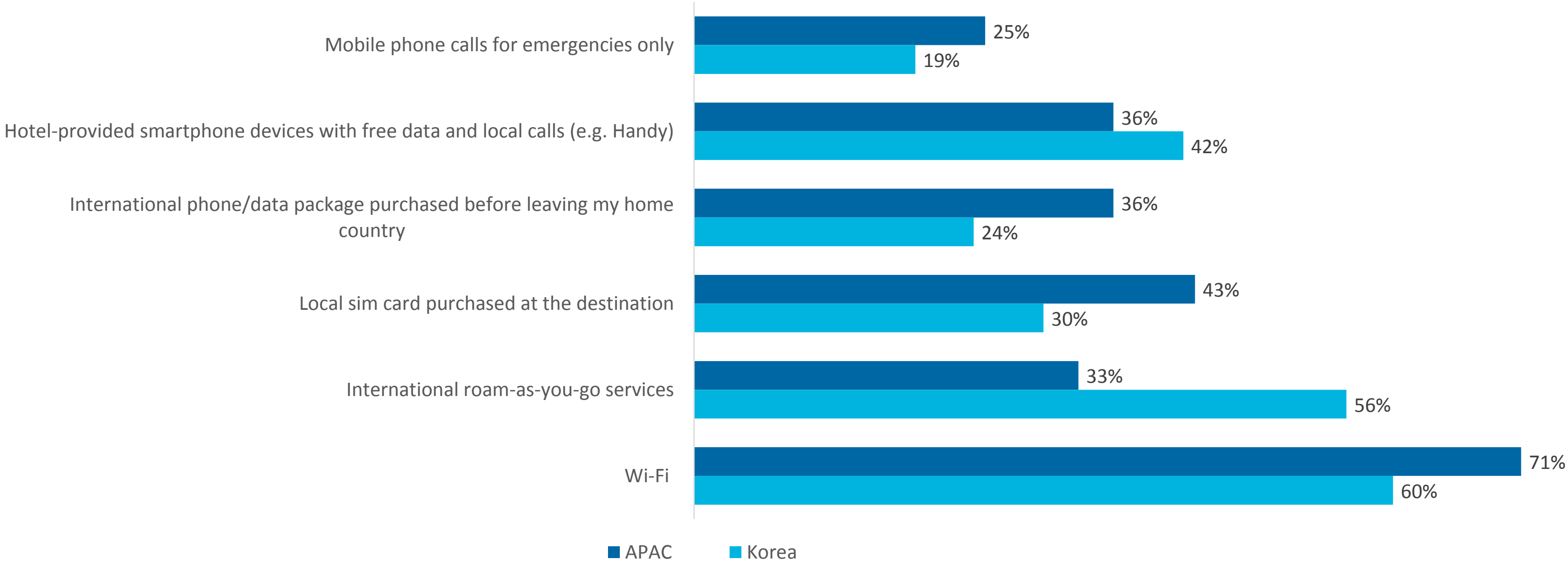■ APAC ■ Korea

CONNECT ME

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

Most Korean respondents use Wi-Fi (60%) to stay connected when they are travelling abroad, followed by an international roam-as-you-go service (56%), which is higher than the regional average (33%). Local sim cards purchased at the destination is not as common for Koreans (30%) compared to the rest of APAC (43%) and it's also less common that they use international roaming packages purchased before leaving their home country (24% vs. 36%).

How travellers choose to stay connected when travelling abroad

| Category	APAC	Korea
Mobile phone calls for emergencies only	25%	19%
Hotel-provided smartphone devices with free data and local calls (e.g. Handy)	36%	42%
International phone/data package purchased before leaving my home country	36%	24%
Local sim card purchased at the destination	43%	30%
International roam-as-you-go services	33%	56%
Wi-Fi	71%	60%

■ APAC ■ Korea

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'

41% of Korean travellers do not use any apps while travelling. Google Maps (17%), HanaTour (7%) and Google (7%) are the top 3 mobile apps used while travelling.
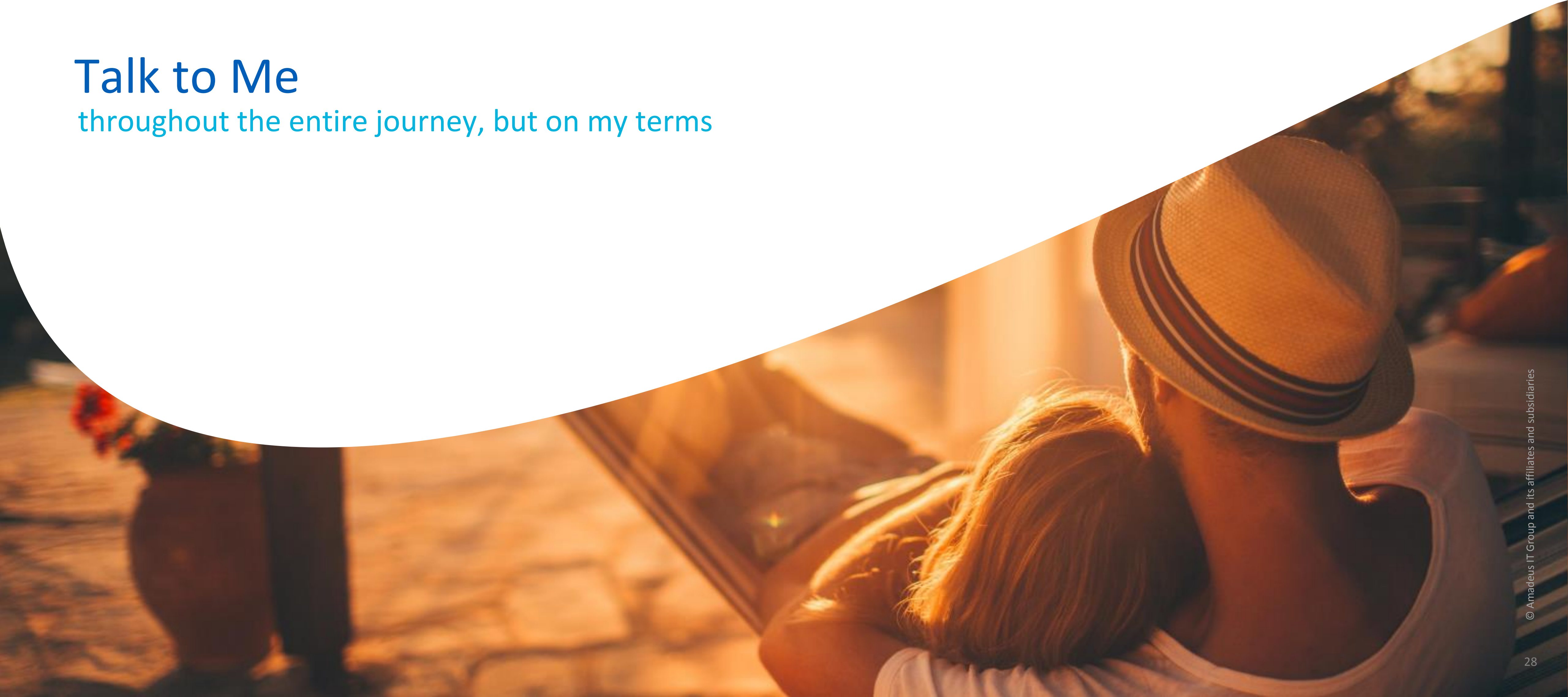
Top 3 mobile apps used while travelling
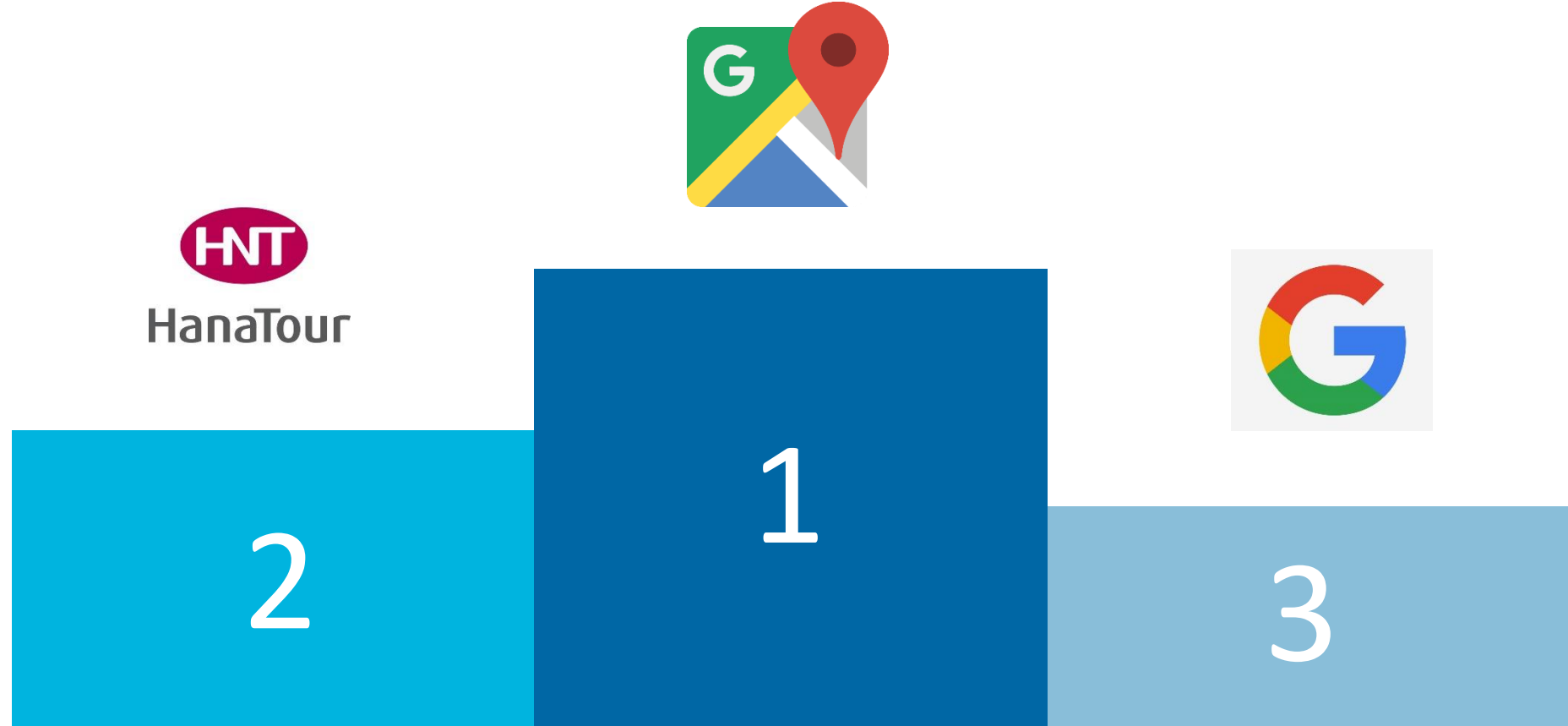
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Talk to Me

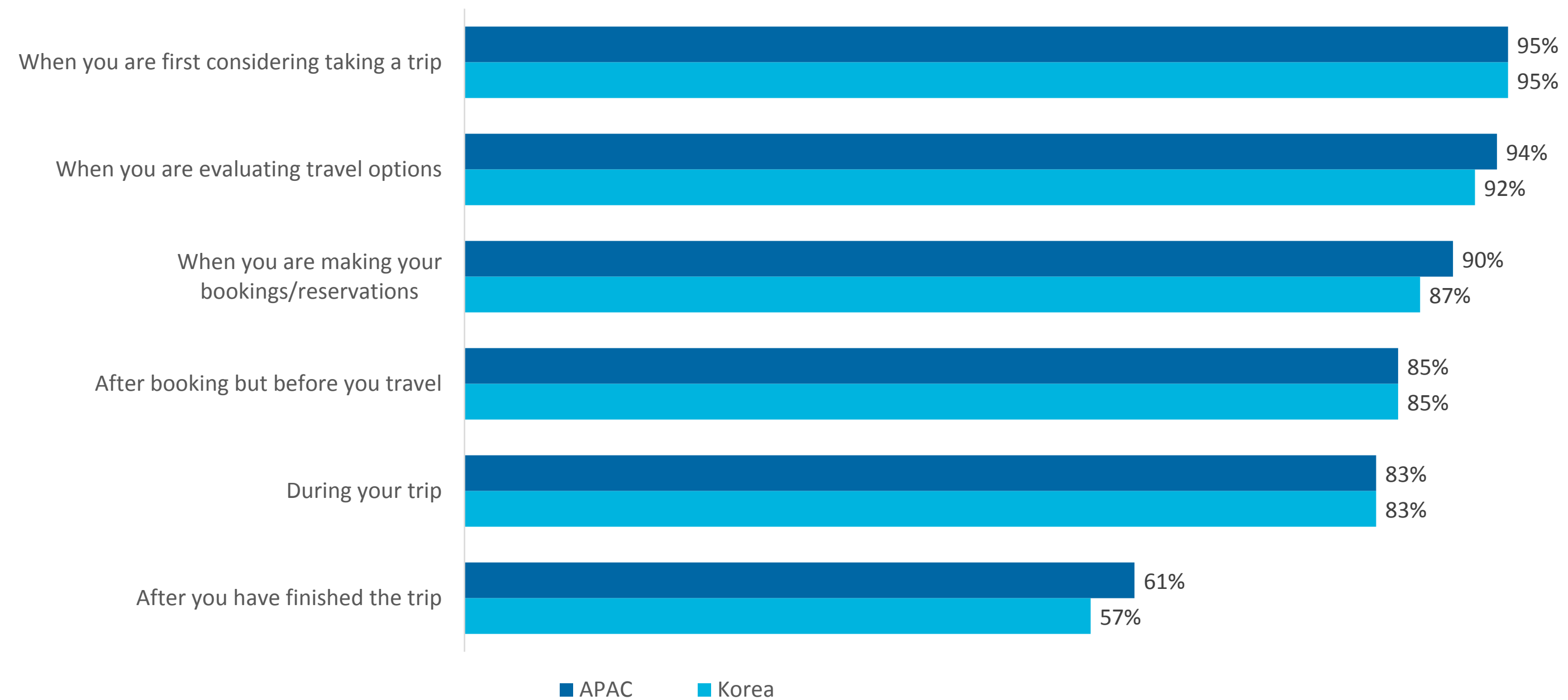throughout the entire journey, but on my terms

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?

Koreans are most interested in receiving travel-based recommendations when they are first considering taking a trip (95%) and when they are evaluating travel options (92%).

% of travellers interested in receiving travel-based recommendations

Stage	APAC	Korea
When you are first considering taking a trip	95%	95%
When you are evaluating travel options	94%	92%
When you are making your bookings/reservations	90%	87%
After booking but before you travel	85%	85%
During your trip	83%	83%
After you have finished the trip	61%	57%

■ APAC ■ Korea

Percentage of respondents choosing 'Interested' and 'Very interested' for each option is presented.
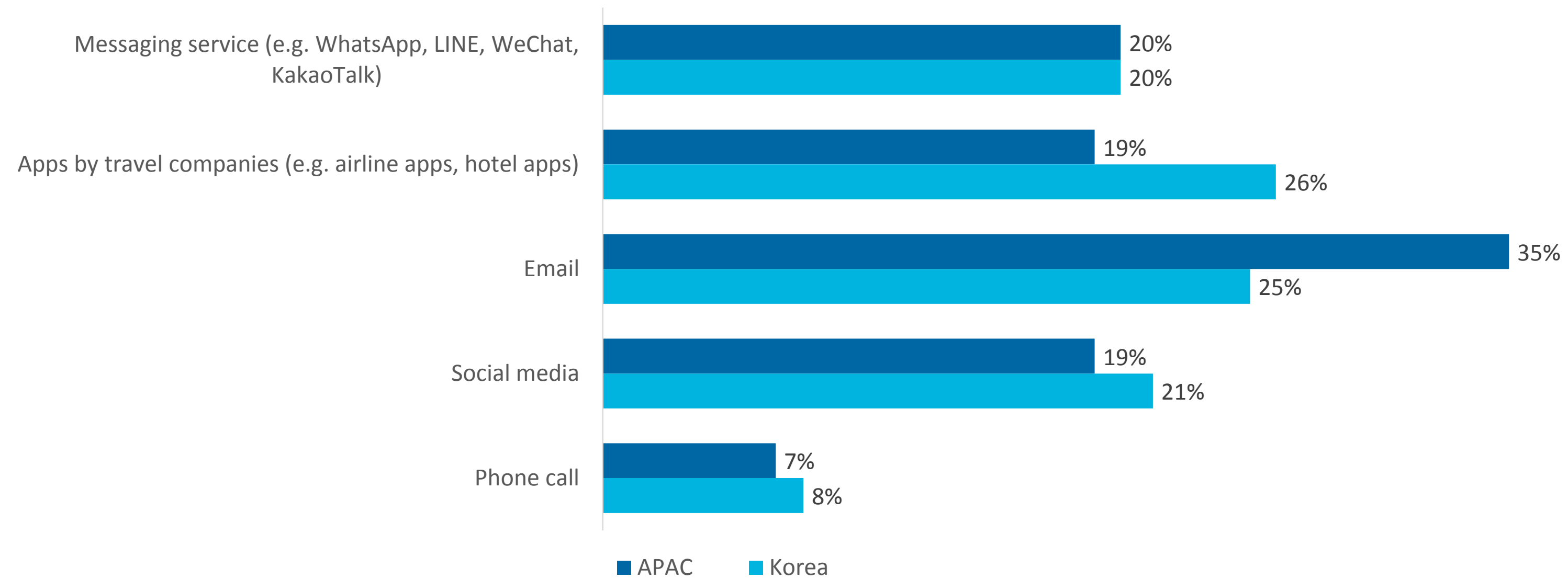
TALK TO ME

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

The most popular platforms for Korean travellers to receive updates or recommendations about their trips through are apps produced by travel companies (e.g. airline apps, hotel apps) (26%, compared to regional average of 19%). This is followed by email (25%) which is lower than the regional average (35%).

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

| Channel	APAC	Korea
Messaging service (e.g. WhatsApp, LINE, WeChat, KakaoTalk)	20%	20%
Apps by travel companies (e.g. airline apps, hotel apps)	19%	26%
Email	35%	25%
Social media	19%	21%
Phone call	7%	8%

■ APAC ■ Korea

Delight Me
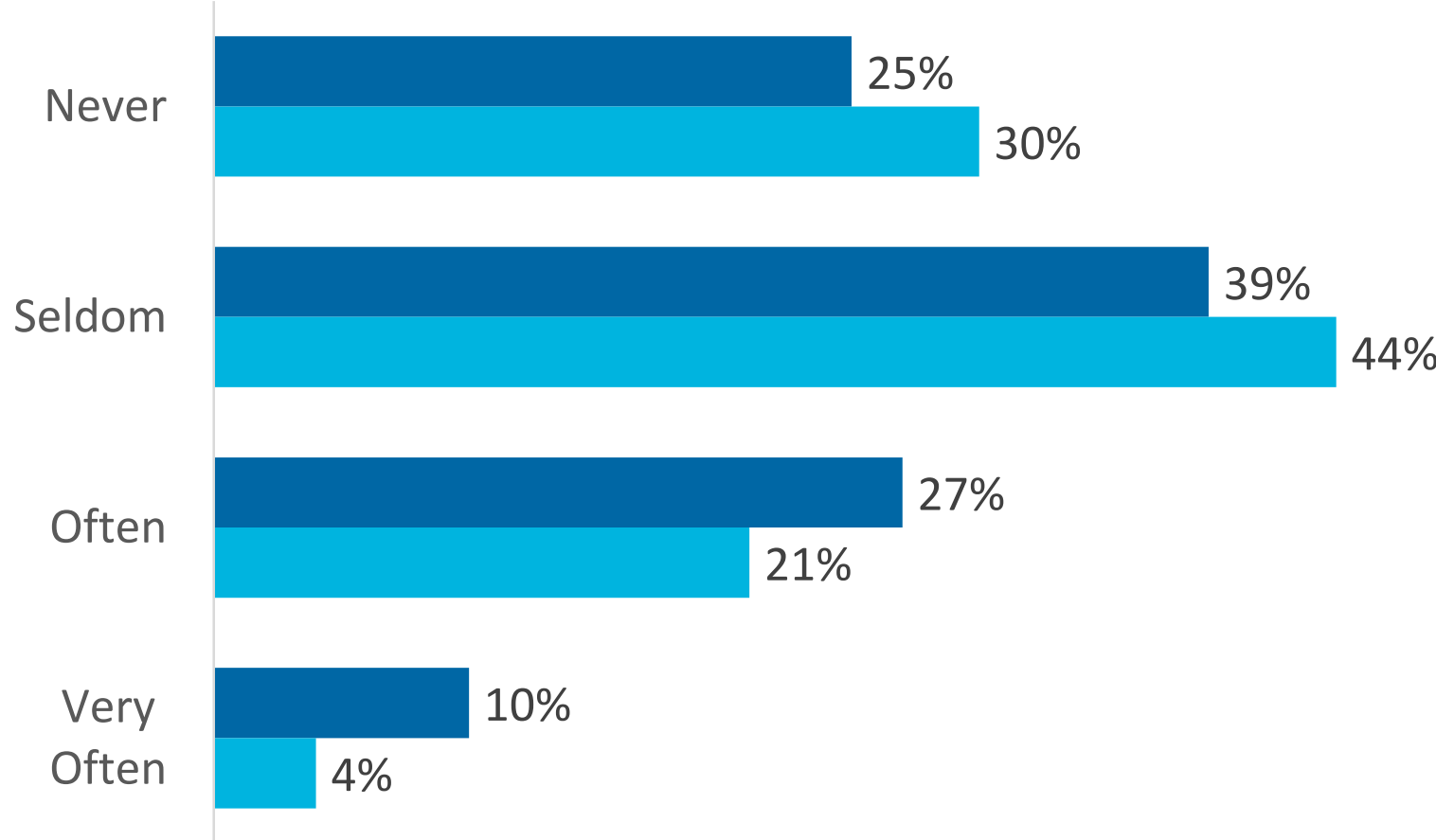and bring the magic back into travel, every step of the way
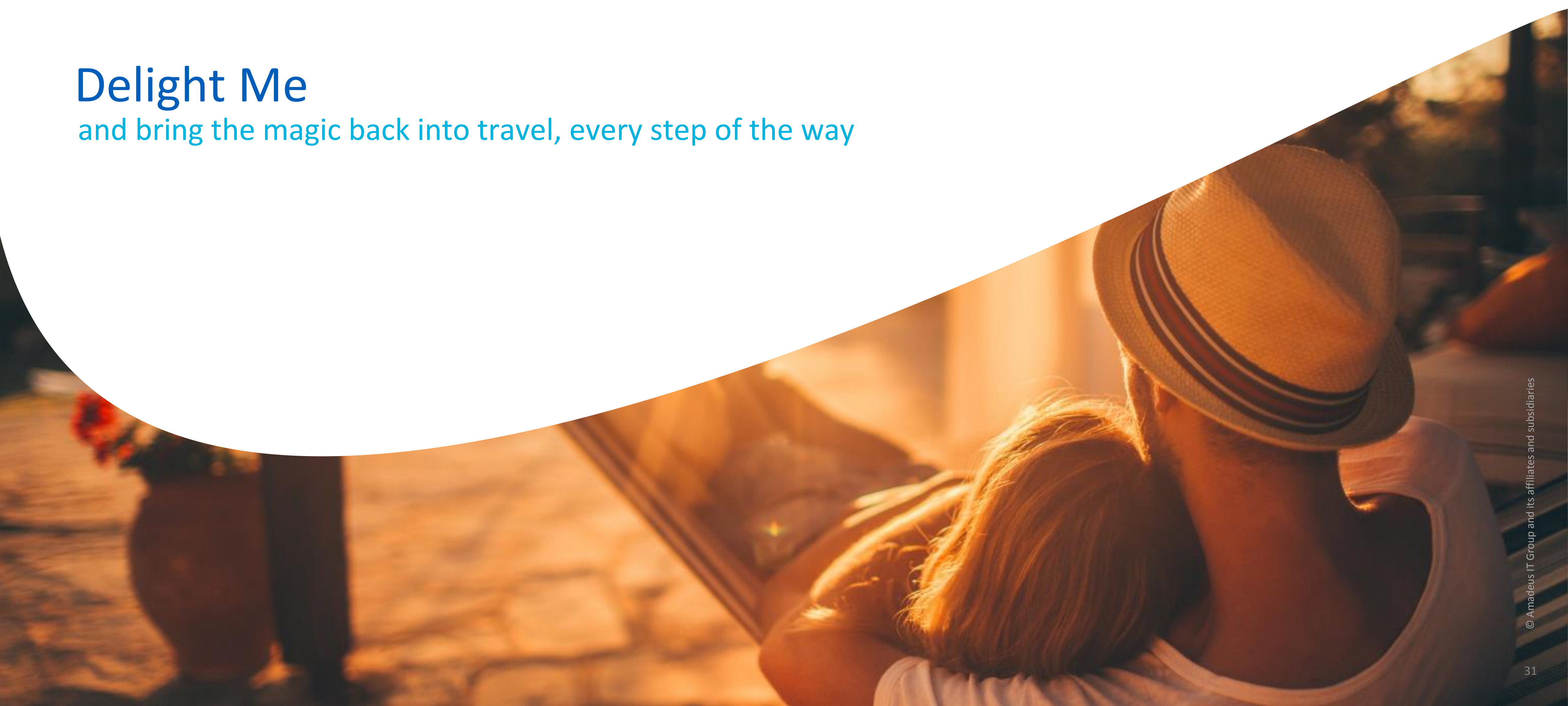
DELIGHT ME

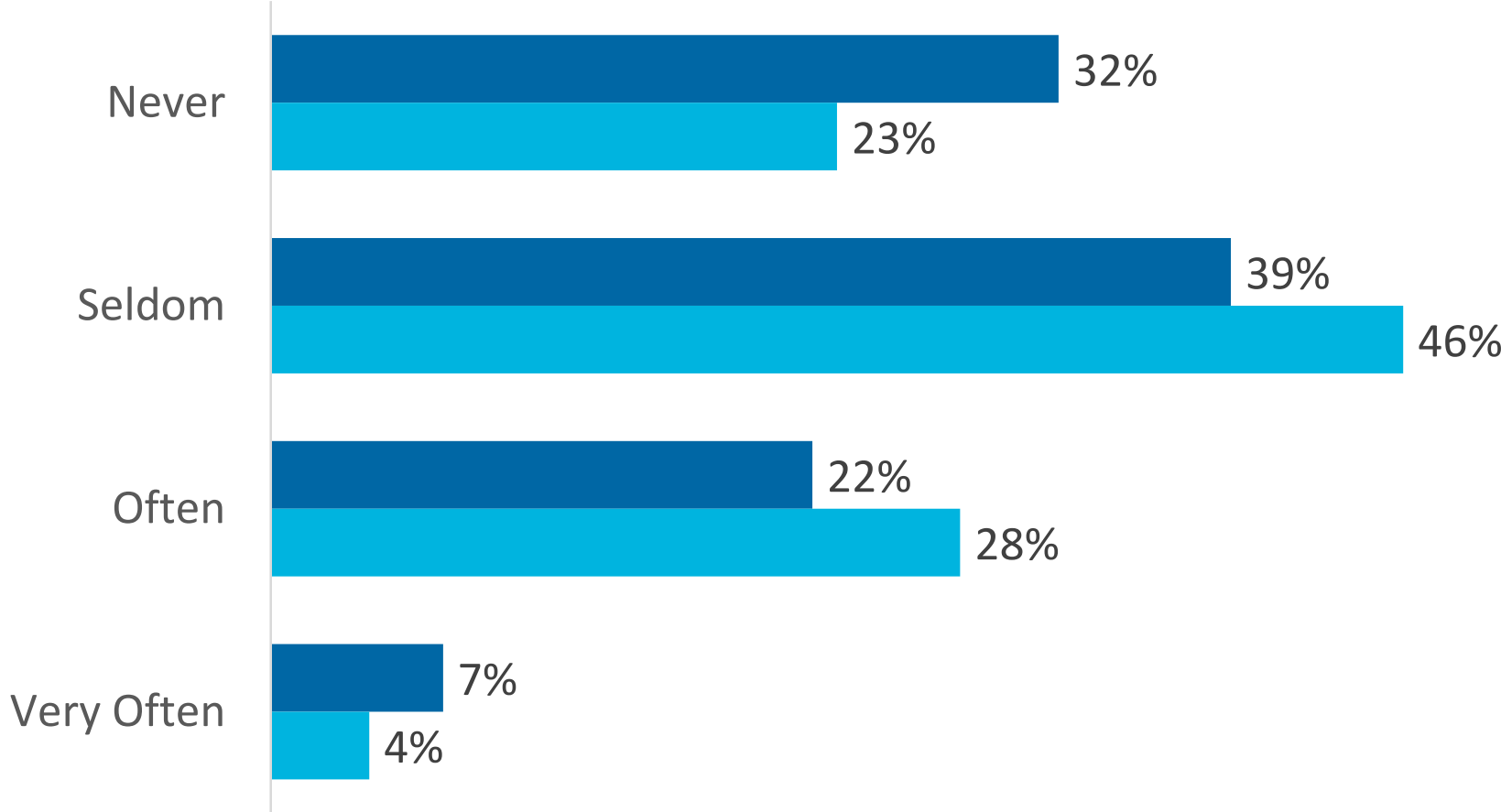## Q14. How often do you use the following apps or services?

More than 65% of Korean respondents seldom or have never used the apps and services mentioned, either for getting around (74%), which is higher than the regional average (64%) or for accommodation during a trip (69% vs. 71% APAC).
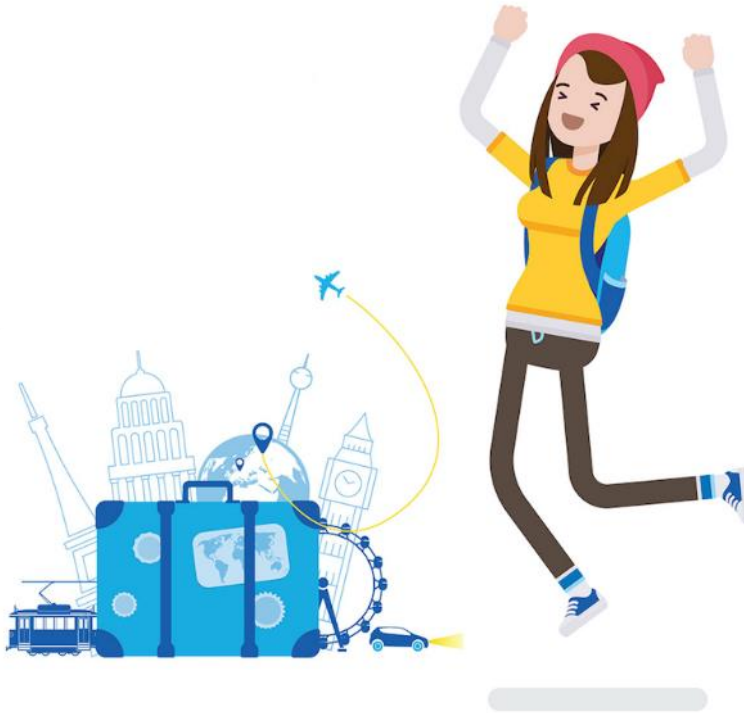
Apps like Uber, Grab, Lyft, Ola, Didi Chuxing etc.
to get around during my trip

	APAC	Korea
Never	25%	30%
Seldom	39%	44%
Often	27%	21%
Very Often	10%	4%

Apps or services like Airbnb, Couch Surfing etc. for stays during my trip

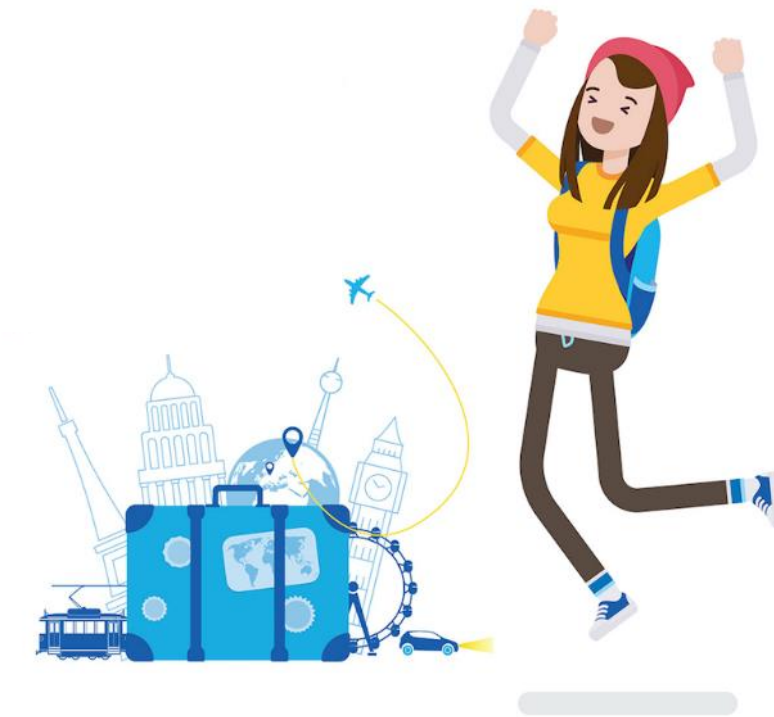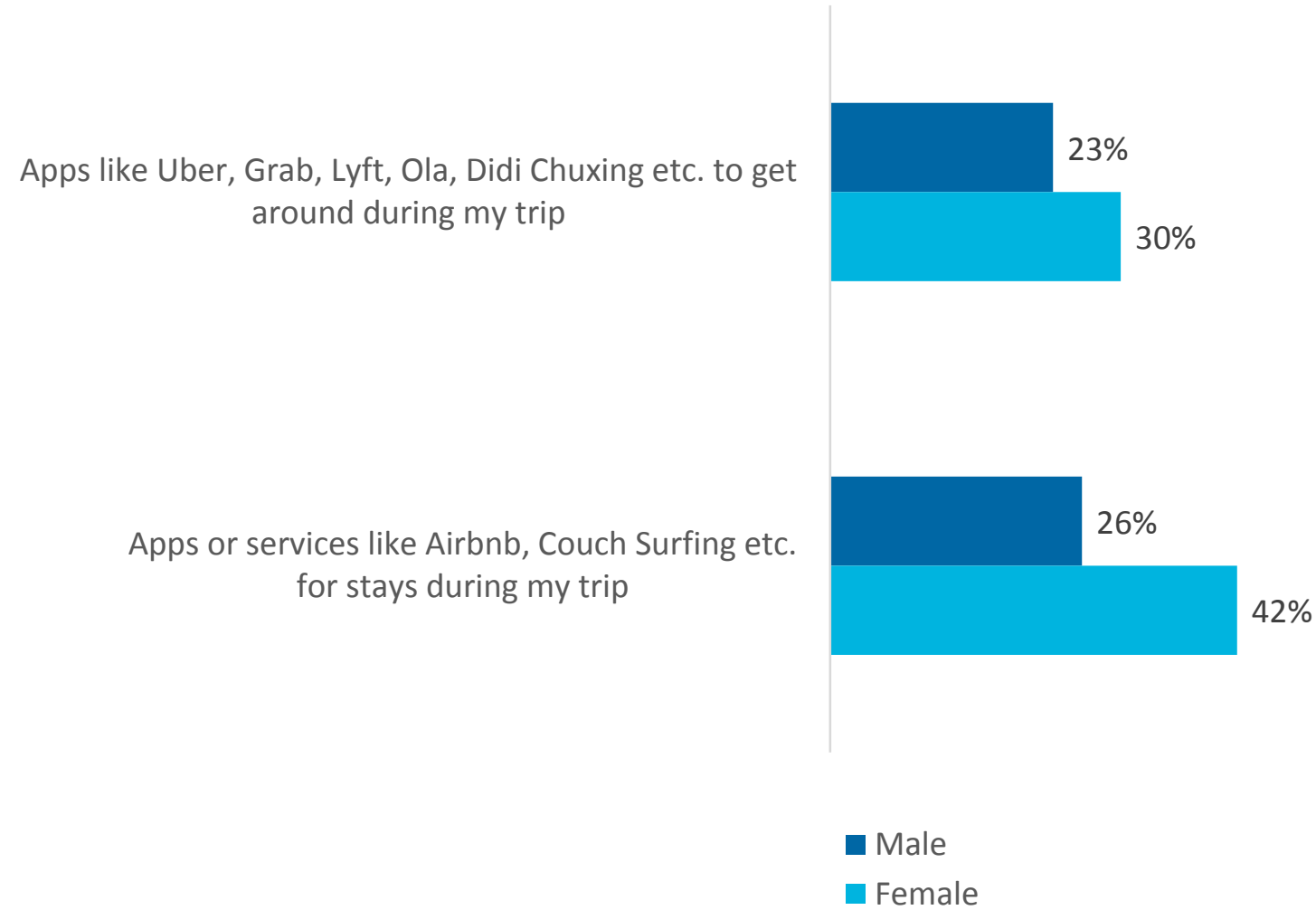|	APAC	Korea
Never	32%	23%
Seldom	39%	46%
Often	22%	28%
Very Often	7%	4%

■ APAC ■ Korea

DELIGHT ME

(Continued) Q14. How often do you use the following apps or services?
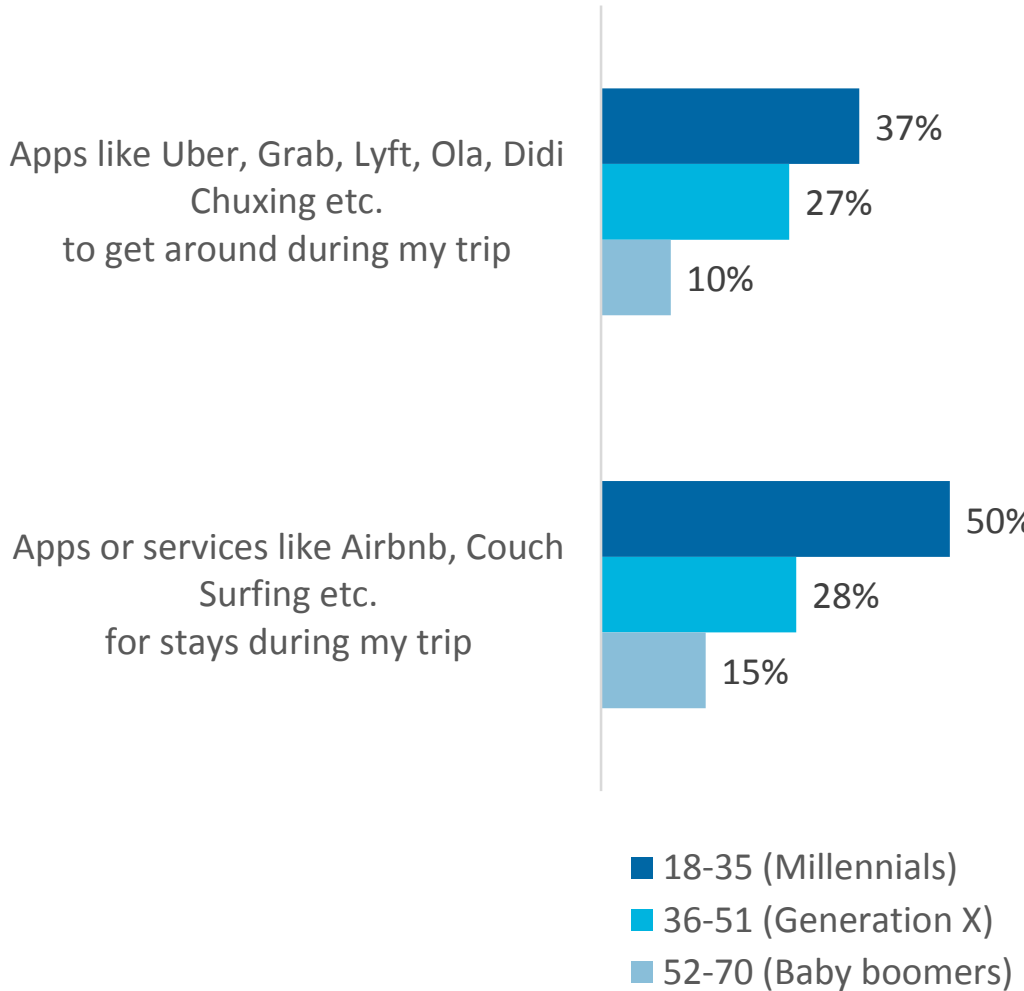
Female travellers in Korean tend to use sharing economy apps and services more than male travellers do. 30% of Korean women vs. 23% of Korean men use apps for getting around while 42% of women use them for accommodation, compared to just 26% of men. Notably, millennials are also the most avid users of the services compared to other age groups. Frequent travellers (more than 8 trips a year) use these services considerably more than others, 83% to get around and 78% for accommodation.

By gender

Apps like Uber, Grab, Lyft, Ola, Didi Chuxing etc. to get around during my trip
- 23%
- 30%

Apps or services like Airbnb, Couch Surfing etc. for stays during my trip
- 26%
- 42%

■ Male
■ Female

By age

Apps like Uber, Grab, Lyft, Ola, Didi Chuxing etc. to get around during my trip
- 37%
- 27%
- 10%

Apps or services like Airbnb, Couch Surfing etc. for stays during my trip
- 50%
- 28%
- 15%

■ 18-35 (Millennials)
■ 36-51 (Generation X)
■ 52-70 (Baby boomers)

By travel frequency

Apps like Uber, Grab, Lyft, Ola, Didi Chuxing etc. to get around during my trip
- 11%
- 24%
- 83%

Apps or services like Airbnb, Couch Surfing etc. for stays during my trip
- 17%
- 33%
- 78%

■ 1-2 trips in the last 12 months
■ 3-7 trips in the last 12 months
■ 8 trips or more in the last 12 months
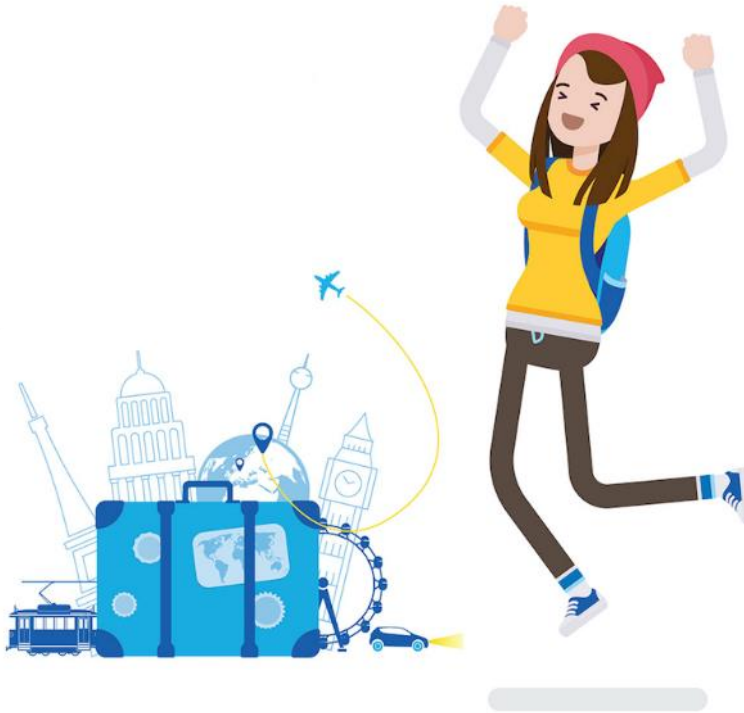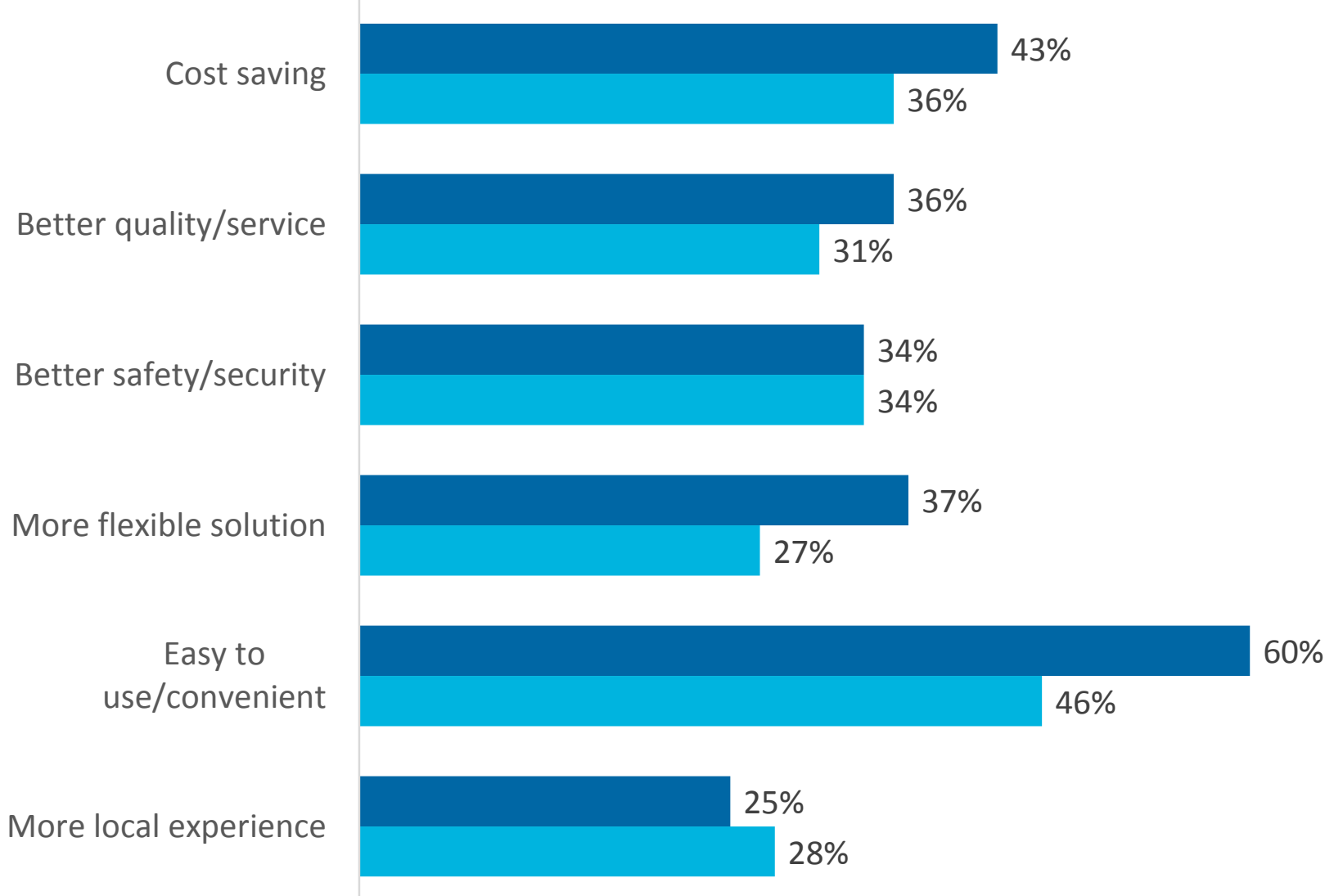
DELIGHT ME

Q15. Why did you choose to use these sharing economy services and apps? *Select all that apply*
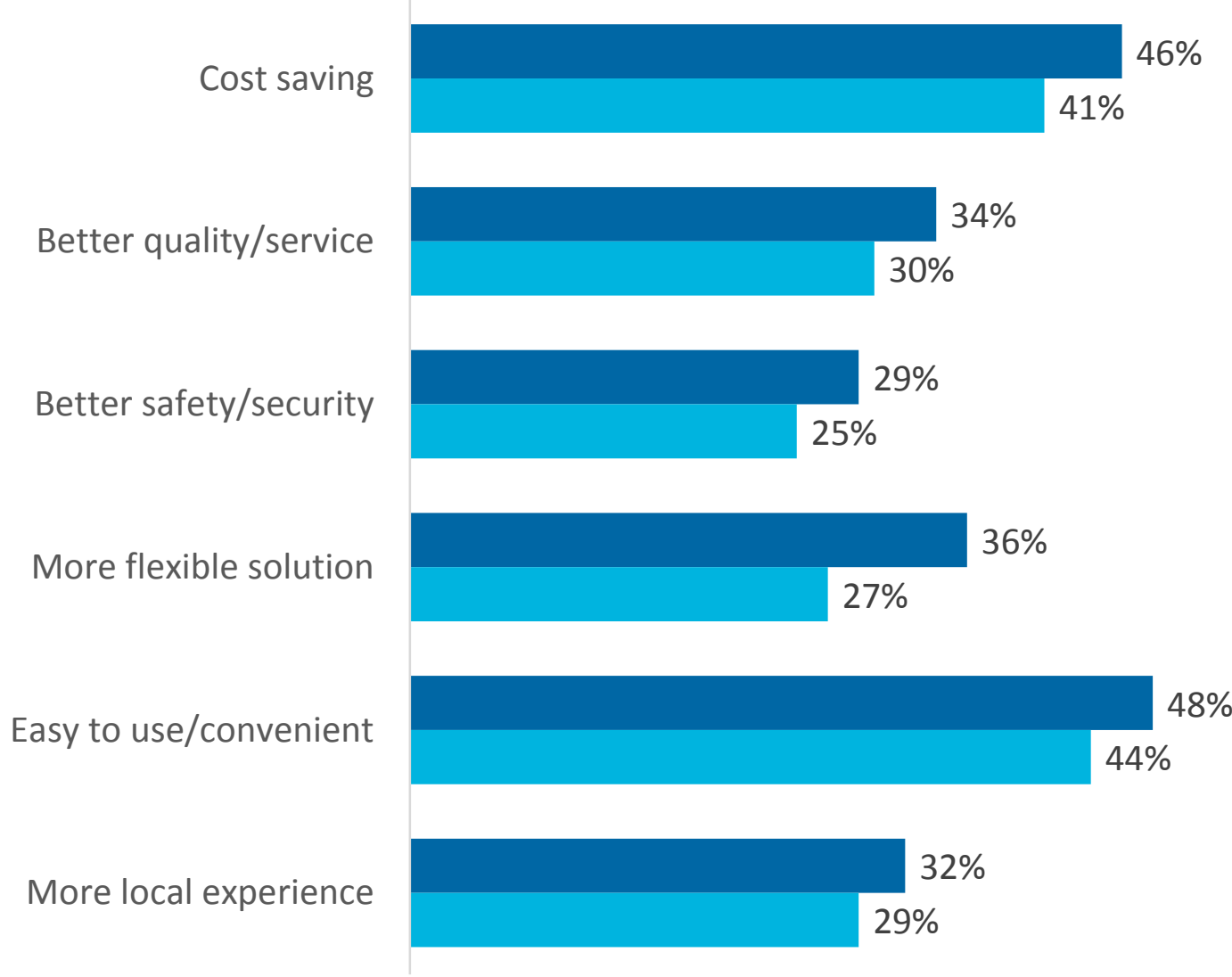
In general, Korean respondents choose to use sharing economy apps because they are easy to use and convenient, both for getting around during trips (46%), which is lower than the regional average (60%), or for stays during trips (44%).

Reasons for using apps to get around during trips

	APAC	Korea
Cost saving	43%	36%
Better quality/service	36%	31%
Better safety/security	34%	34%
More flexible solution	37%	27%
Easy to use/convenient	60%	46%
More local experience	25%	28%

Reasons for using services/apps for stays during trips

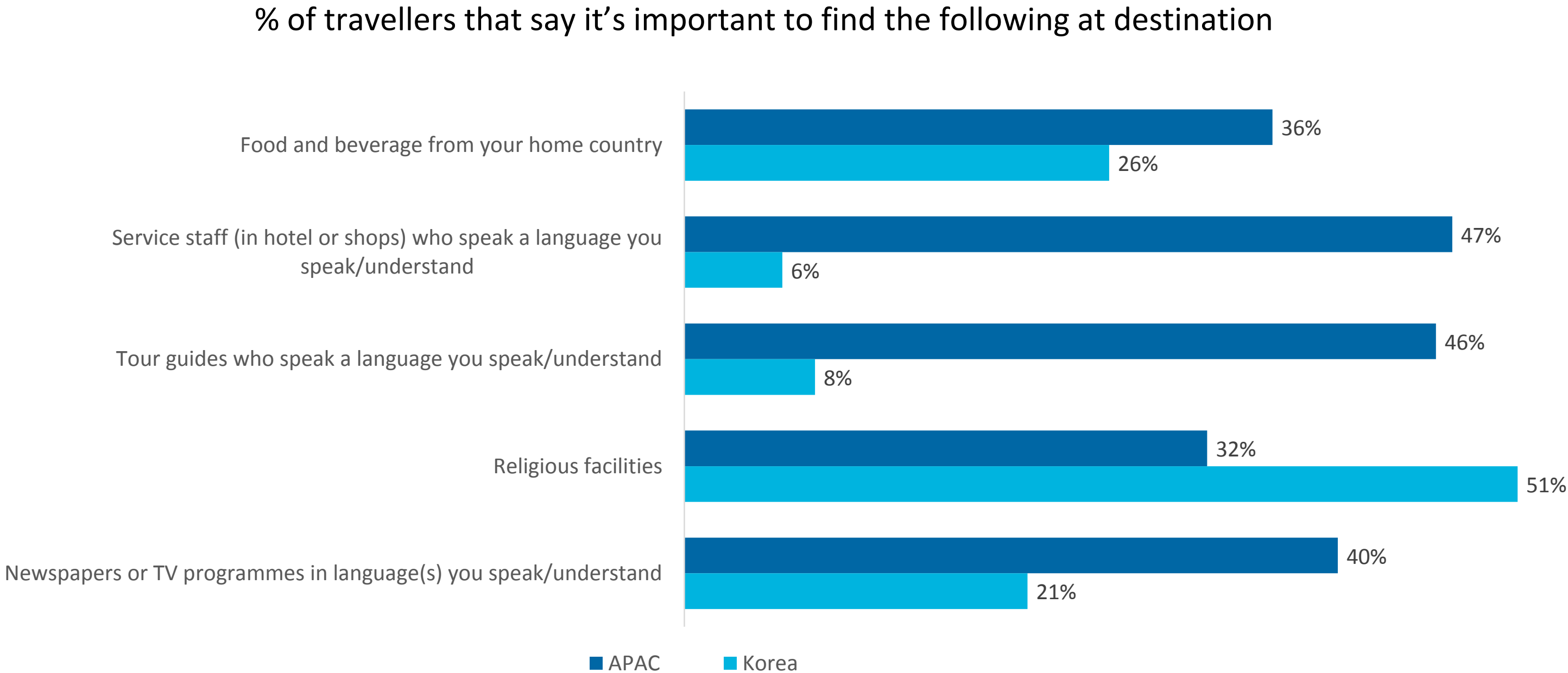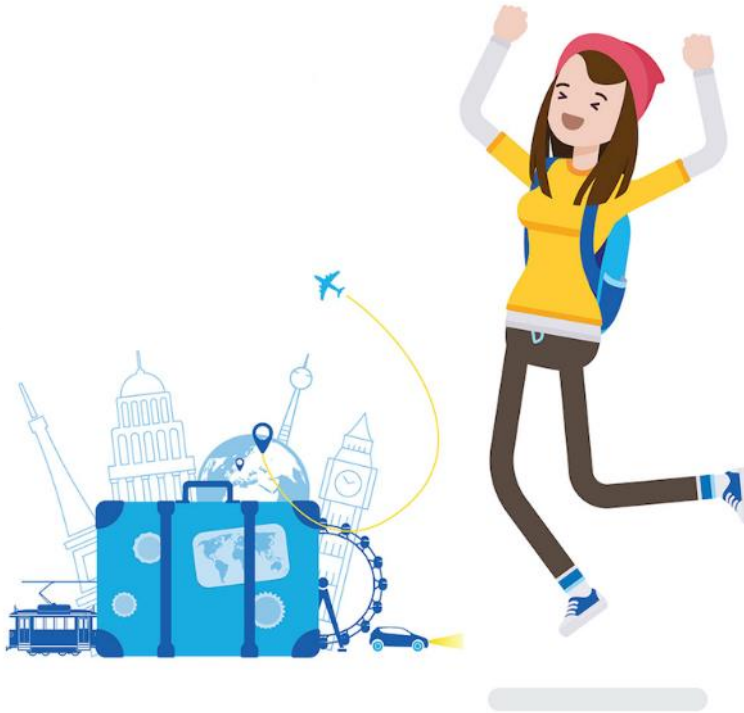|	APAC	Korea
Cost saving	46%	41%
Better quality/service	34%	30%
Better safety/security	29%	25%
More flexible solution	36%	27%
Easy to use/convenient	48%	44%
More local experience	32%	29%

■ APAC ■ Korea

Sample size: 279 (get around the trips), 310 (stays during trips)

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

Among all the choices, religious facilities were relatively more important (54%) compared to the regional average (32%). It is interesting that Koreans do not rely on other options, especially service staff (6%) or tour guides (8%) who speak a language they speak or understand, compared with the regional averages (47%, 46%).

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

Category	APAC	Korea
Food and beverage from your home country	36%	26%
Service staff (in hotel or shops) who speak a language you speak/understand	47%	6%
Tour guides who speak a language you speak/understand	46%	8%
Religious facilities	32%	51%
Newspapers or TV programmes in language(s) you speak/understand	40%	21%

■ APAC ■ Korea

* 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?

Those Koreans who feel that their expectations have been exceeded by travel providers were mainly impressed by hotel or accommodation providers (27%), slightly above the APAC average of 24%.

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

Provider	APAC	Korea
Airlines	15%	10%
Hotel or other accommodation providers	24%	27%
Booking sites	23%	18%
Travel agent	13%	16%
Tour operators	11%	13%
A travel provider has never exceeded my expectations	14%	17%

■ APAC ■ Korea

DELIGHT ME

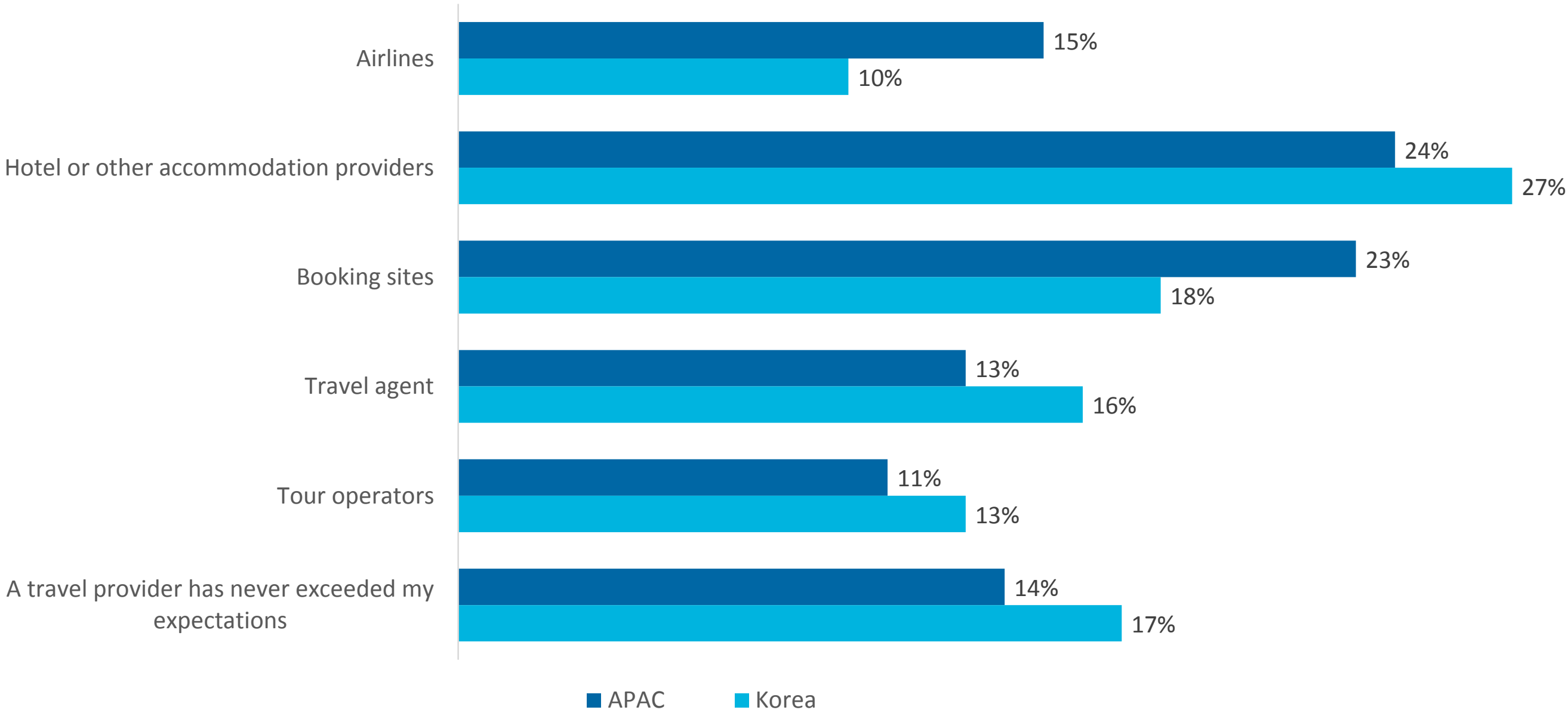(Continued) Q17. Based on your past travel experiences, which of the following travel service providers have impressed you and exceeded your expectations the most?

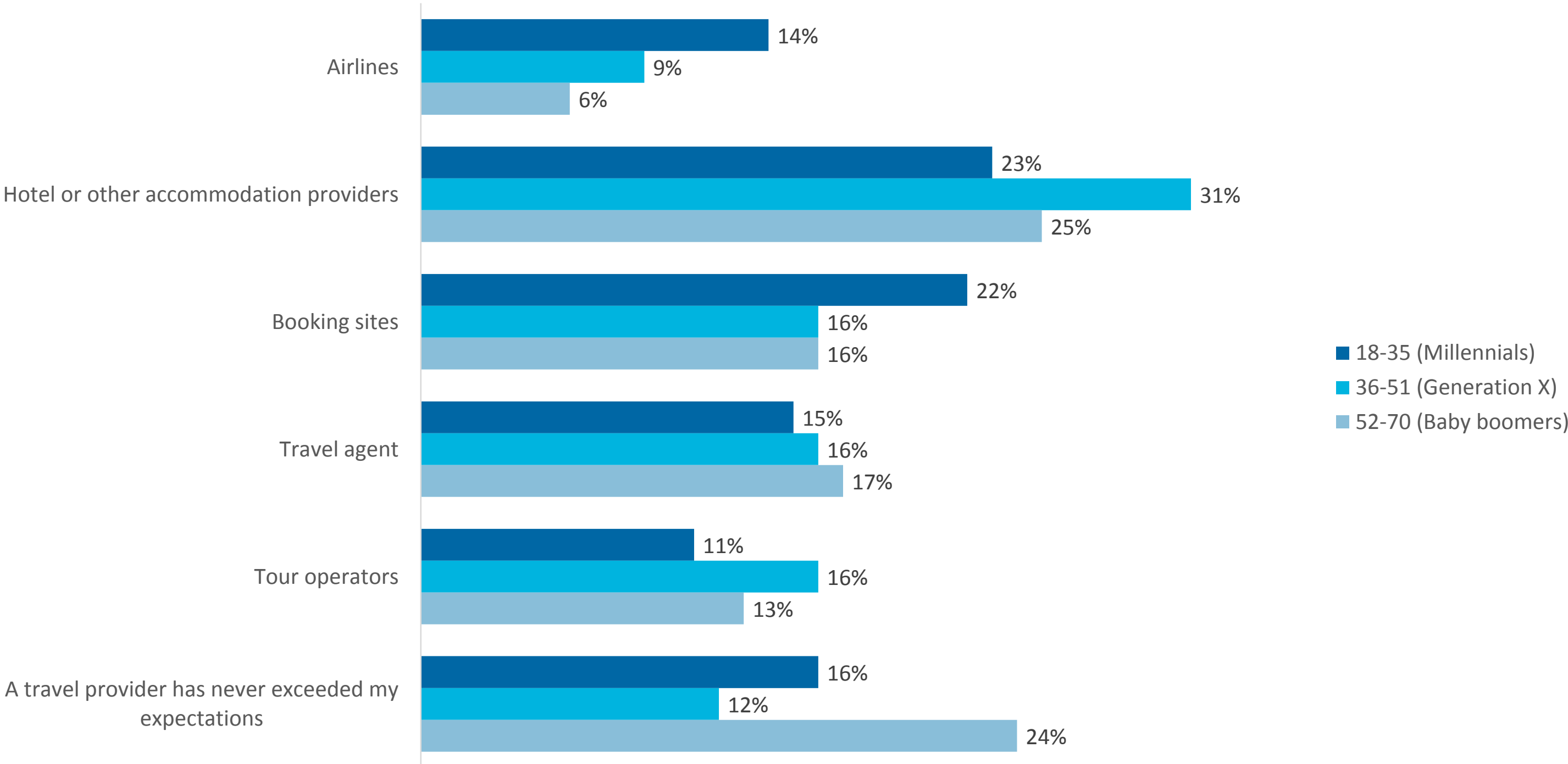Baby boomers have had their expectations exceeded more (24%) than other age groups (16% millennials and 12% generation X).
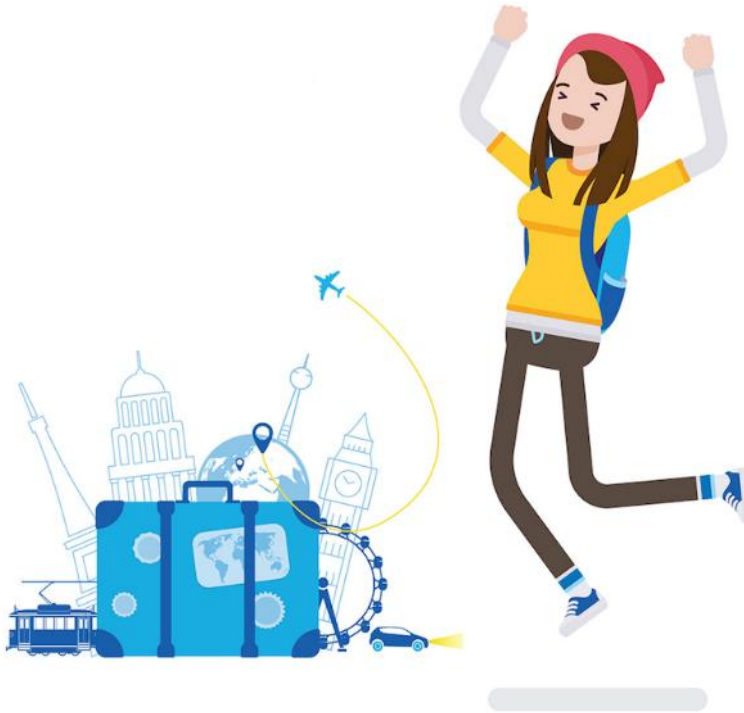
Travel service providers that have impressed travellers and exceeded expectations the most

Provider	18-35 (Millennials)	36-51 (Generation X)	52-70 (Baby boomers)
Airlines	14%	9%	6%
Hotel or other accommodation providers	23%	31%	25%
Booking sites	22%	16%	16%
Travel agent	15%	16%	17%
Tour operators	11%	16%	13%
A travel provider has never exceeded my expectations	16%	12%	24%

Legend:
- 18-35 (Millennials)
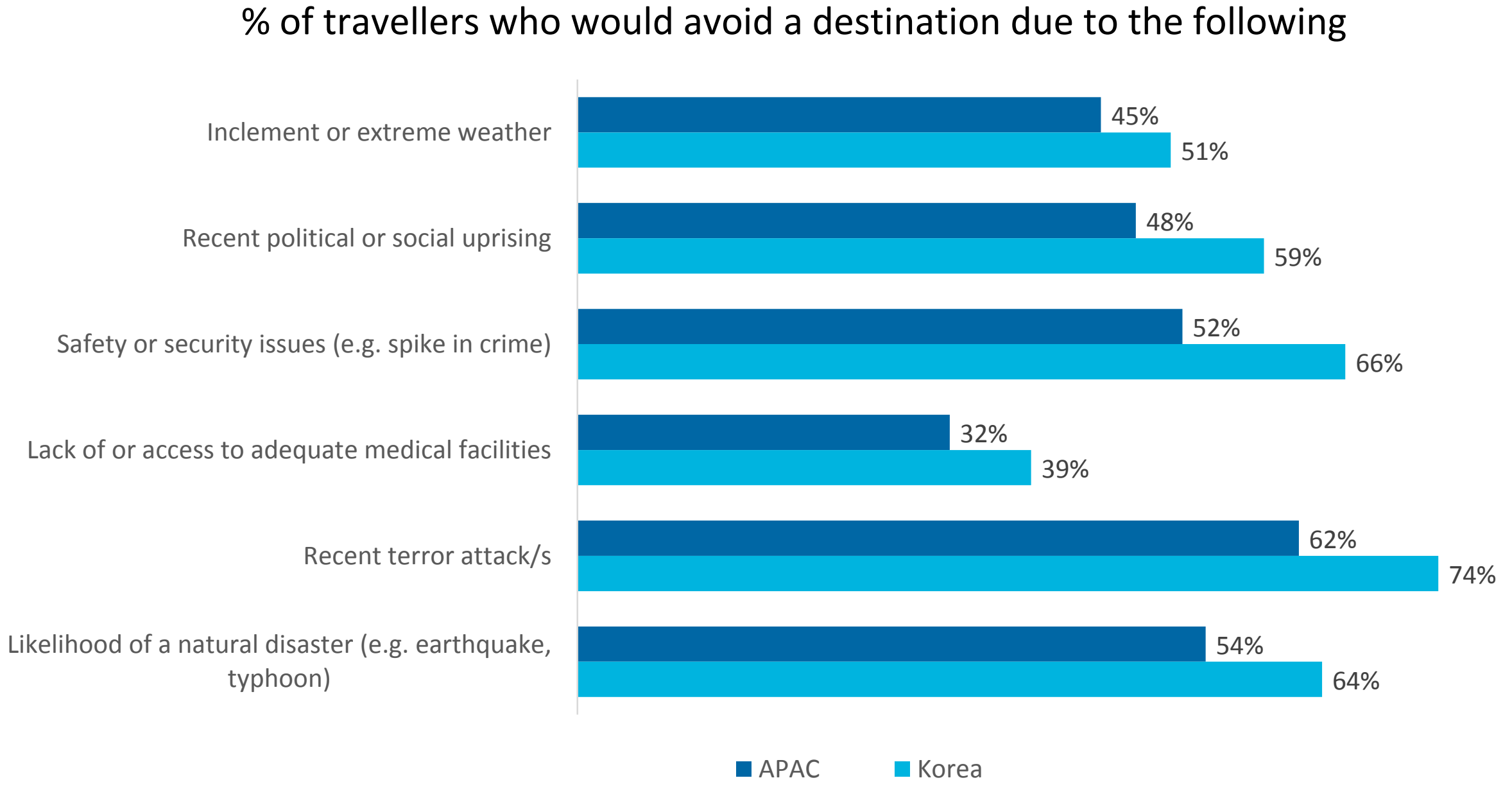- 36-51 (Generation X)
- 52-70 (Baby boomers)

Care for Me
and keep me safe and secure

CARE FOR ME

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?

Koreans are generally more sensitive to adverse incidents when considering travel to a certain destination compared with the regional average. Recent terror attack/s have the greatest effect (74% compared to 62% APAC wide) on the likelihood of people travelling to certain destinations, while safety or security issues are the second most likely factor to affect their decision. (66% - 52% APAC). After the Philippines, they are the country most likely to have their travel plans affected because of terrorism.

% of travellers who would avoid a destination due to the following

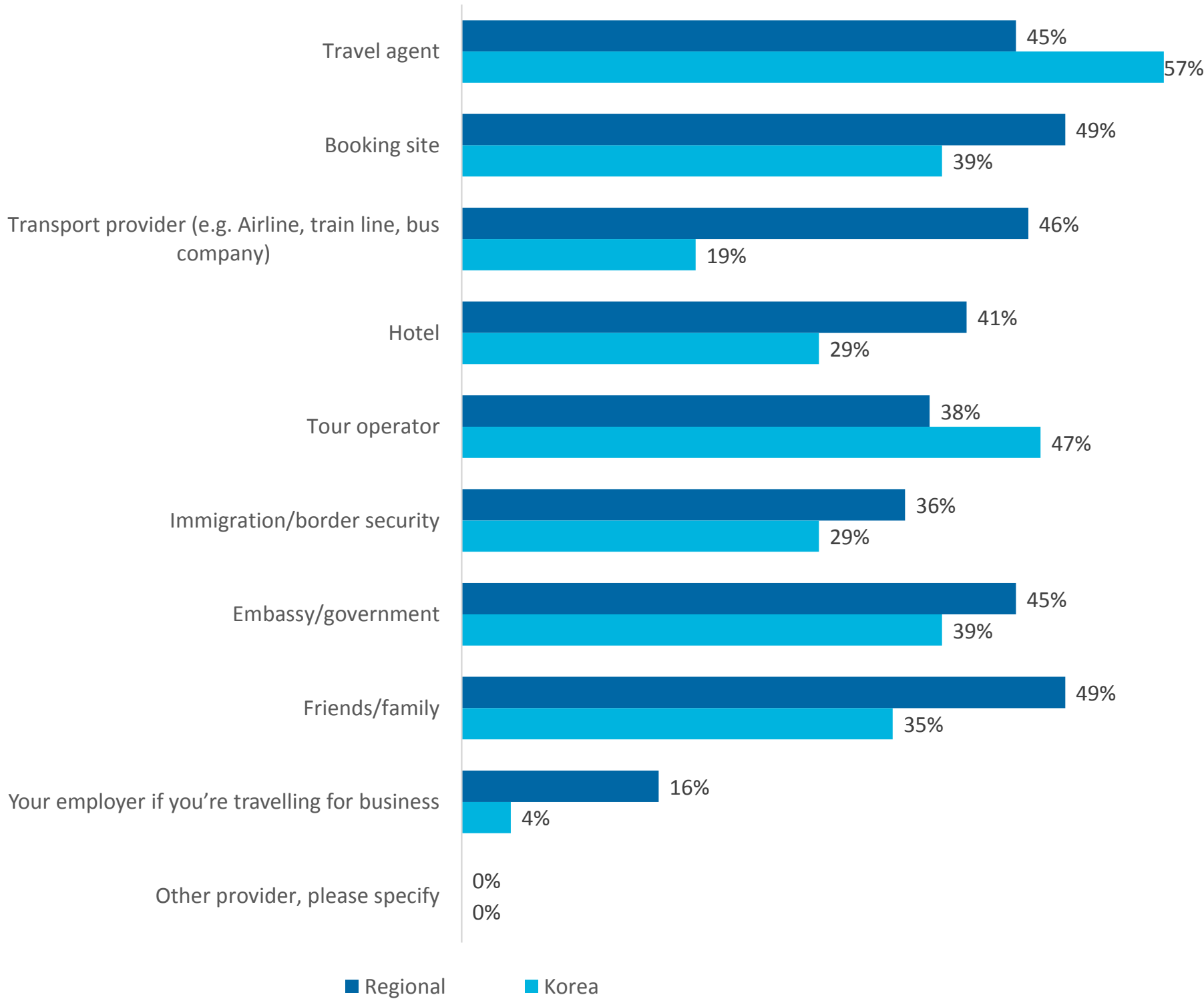|	APAC	Korea
Inclement or extreme weather	45%	51%
Recent political or social uprising	48%	59%
Safety or security issues (e.g. spike in crime)	52%	66%
Lack of or access to adequate medical facilities	32%	39%
Recent terror attack/s	62%	74%
Likelihood of a natural disaster (e.g. earthquake, typhoon)	54%	64%

■ APAC ■ Korea

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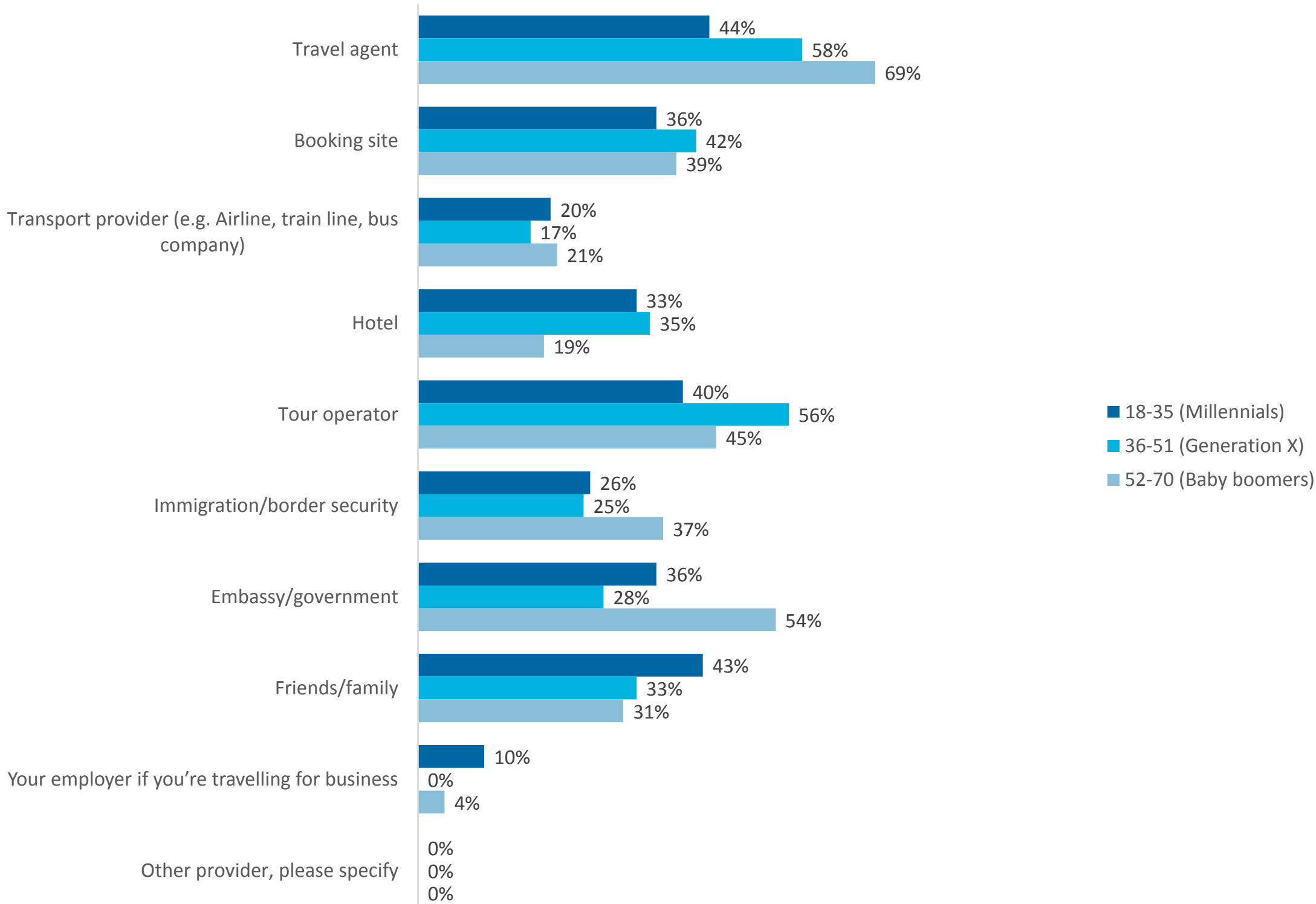
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CARE FOR ME

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

Travel agents (57%) are the top channel that Korean respondents prefer to receive safety or security updates from at their destination, which is higher than the regional average of 45%. It is interesting that only 19% of them prefer transport providers as their source, which is much lower than the regional average (46%). 47% expect updates from their tour operator, higher than the 38% APAC average. Baby boomers look mainly to their travel agent (69%) and embassy/government (54%) compared to other generations.

Preferred sources of safety or security updates

Source	Regional	Korea
Travel agent	45%	57%
Booking site	49%	39%
Transport provider (e.g. Airline, train line, bus company)	46%	19%
Hotel	41%	29%
Tour operator	38%	47%
Immigration/border security	36%	29%
Embassy/government	45%	39%
Friends/family	49%	35%
Your employer if you're travelling for business	16%	4%
Other provider, please specify	0%	0%

■ Regional ■ Korea

By age

Source	18-35 (Millennials)	36-51 (Generation X)	52-70 (Baby boomers)
Travel agent	44%	58%	69%
Booking site	36%	42%	39%
Transport provider (e.g. Airline, train line, bus company)	20%	17%	21%
Hotel	33%	35%	19%
Tour operator	40%	56%	45%
Immigration/border security	26%	25%	37%
Embassy/government	36%	28%	54%
Friends/family	43%	33%	31%
Your employer if you're travelling for business	10%	0%	4%
Other provider, please specify	0%	0%	0%

■ 18-35 (Millennials)
■ 36-51 (Generation X)
■ 52-70 (Baby boomers)

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Thank you!