

INNOVATING TO IMPACT

dentsu

APAC EDITION

# THE APAC CONSUMER TRAVEL LANDSCAPE

Q1 2026



PART OF THE DENTSU CONSUMER NAVIGATOR SERIES

# ABOUT THIS STUDY

## Survey Methodology

- The survey was conducted by dentsu via Toluna's online research panel
- The survey was fielded during Feb 19, 2026 – Mar 5, 2026, in Australia, China, India, Malaysia and Vietnam.
- The sample consisted of 600 respondents aged 18+ for each of the countries surveyed.
- Controls for nationally representative weighting across age, gender, and region (using the latest publicly available Census numbers) were implemented.

In this report we compare APAC data with the US and EMEA. While the data for the EMEA was collected in the same timeframe as the APAC data, the US data is from 2025.

### PLEASE NOTE:

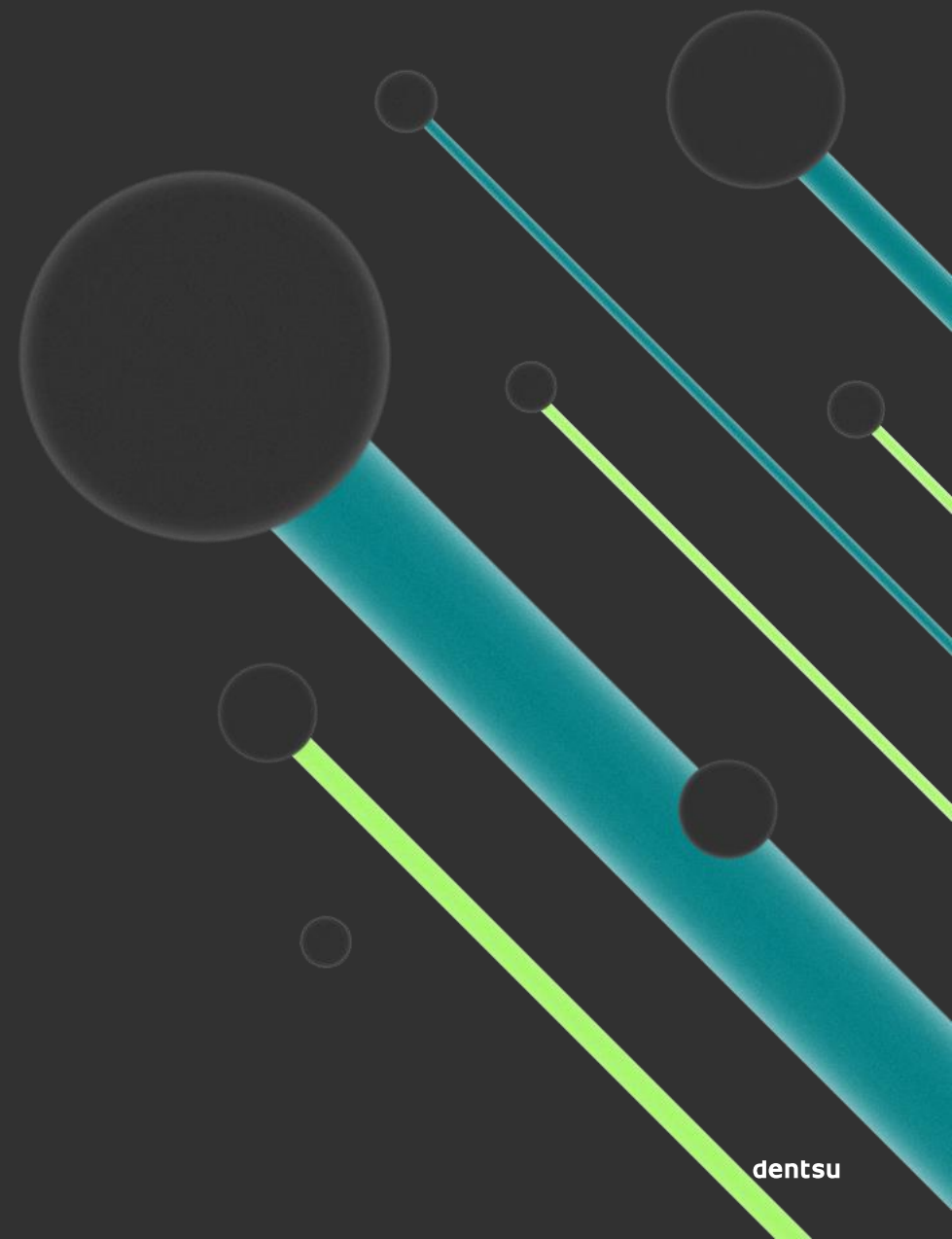
As most of the data was collected in early February, the information contained in this edition does not incorporate analysis of the ongoing Middle East conflict or how it may have affected APAC consumer views about cross-continental travel.





# OUR THEMES

- 01 TOP CONSUMER INSIGHTS**
- 02 USING AI FOR TRAVEL OPTIMIZATION**
- 03 LOOKING FOR INSPIRATION IN MEDIA & ENTERTAINMENT**
- 04 HOW APAC CONSUMERS ARE CHOOSING WHERE TO TRAVEL**
- 05 WHAT INFLUENCES TRAVEL BRAND PREFERENCES**



# TOP CONSUMER INSIGHTS

## **AI IS UNIVERSALLY ADOPTED AND GENERIC, PARADOXICALLY REINFORCING LOYALTY.**

57% of APAC travelers have used AI for travel planning, far ahead of the US (37% in 2025) and EMEA (26%). About 9 in 10 say it improves their experience. But 53% rate AI recommendations as generic. The expected outcome would be more brand switching and disruption. The opposite is happening: 42% say AI makes them more likely to stick with familiar brands. AI usage is concentrated in pre-trip planning and drops during trips and after. AI is functioning as a narrowing funnel that validates existing preferences, not as a discovery engine. Brands already at the top of the funnel benefit most.

## **EFFICIENCY IS EXPECTED, BUT DISTINCT EXPERIENCES WILL DIFFERENTIATE.**

While AI improves speed and clarity, many travelers find recommendations generic. As AI shapes discovery and choice, brands that surface as distinct and experience-led—not

interchangeable—will stand out earlier in the journey.

## **INSPIRATION IS SOCIAL-FIRST, BUT VALIDATION CLOSES THE DECISION.**

Social platforms are a primary trigger for travel inspiration, with Malaysia showing the highest reliance (66%). However, most travelers do not act on inspiration alone. They actively seek validation—through additional research, reviews, and comparisons—before finalizing plans. Inspiration initiates consideration, but confidence and proof close the decision.

## **TRAVEL HAS SHIFTED FROM ASPIRATIONAL TO INTENTIONAL.**

42% of APAC travelers now see travel as a mix of routine and escape, signaling a shift to lifestyle-led travel. At the same time, economic and geopolitical pressures are driving greater caution in planning, with travelers actively

adjusting trip length, destinations, and spend in response to affordability concerns.

## **PROXIMITY, FAMILIARITY, AND SAFETY ANCHOR DESTINATION CHOICE.**

Travel decisions are increasingly shaped by closeness to family and friends, child-friendly environments, and destinations that feel familiar and safe. Domestic and neighboring travel dominate, reinforced by concerns around currency disadvantage and regional tensions.

## **VALUE AND TRUST ARE NON-NEGOTIABLE DRIVERS OF BRAND PREFERENCE.**

Across hotels, airlines, and travel brands, cleanliness, safety and value for money emerge as the strongest purchase drivers. These factors now function as decision filters, not hygiene add-ons. While travelers still trade up selectively, brand preference is anchored in reassurance and reliability first.



# WHAT'S SHAPING TRAVEL ACROSS APAC MARKETS

## AUSTRALIA: GLOBAL ASPIRATION, LOCAL PRAGMATISM, AND NO MARGIN FOR ERROR.

Australia is APAC's most globally oriented travel market (low domestic preference and Europe as #2 destination choice), yet the most price-driven, with low travel frequency, high intent to spend less, and the highest reliance on low-cost brands. With nearly half saying destinations match social media portrayals, the highest in APAC, low AI adoption and infrequent travel leave no margin for error: this market doesn't need more inspiration, it needs proof.

## CHINA: HIGH FREQUENCY, LOW MEMORABILITY, HABITUAL LOYALTY.

China is APAC's most frequent (46% travel 3+ time/year vs 29% average in APAC) and most domestically contained (79% travel within China) market when it comes to travel. Yet they have the least memorable experiences, with just 10% rating trips as extremely memorable. AI reinforces habitual loyalty (over half say it makes them stick with familiar brands) turning travel into an optimized routine that looks

stable until something disrupts the pattern.

## INDIA: TRADING DOWN IN FREQUENCY TO TRADE UP IN QUALITY.

India is APAC's most polarized travel market. 51% are choosing more affordable destinations and 43% are taking shorter trips, yet 68% plan to spend more on summer travel, 43% classify their trips as luxury (4x China's 10%), and 47% have upgraded their airplane class. The logic is concentration: fewer trips, higher stakes per trip. Brands can't choose between an affordable or premium value proposition. They need to answer the question: is this worth the trip I've been saving for?

## MALAYSIA: MOST INFLUENCED BY WHAT THEY LEAST TRUST.

Malaysia is the market most swayed by social media (67% find it inspiring but always do additional research, the highest validation rate in APAC) and most influenced by budget travel content (33%, nearly double the APAC average

of 20%). Yet Malaysia is simultaneously the most economically constrained travel market: 67% are choosing affordable destinations, 48% avoid destinations due to currency, and 63% due to geopolitics. The result: Malaysian travelers are the most reliant on social content to discover options and the most compelled by economic pressure to scrutinize those same options. Social content gets brands on the list. Price and proof determine which ones survive it.

## VIETNAM: THE EXPERIENCE ECONOMY TRAPPED BEHIND A WALL.

Vietnam is the APAC's most transformation-seeking travel market, with the highest share prioritizing experiences and a strong pull toward health and wellness. Yet it is also the most constrained, marked by the highest trip postponement (31%), the strongest geopolitical caution (63%), and a large share (40%) viewing travel as an extension of everyday life, leaving aspiration high but hard to fulfill.



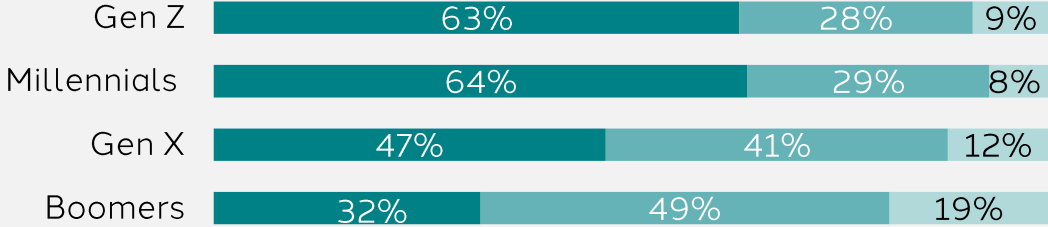
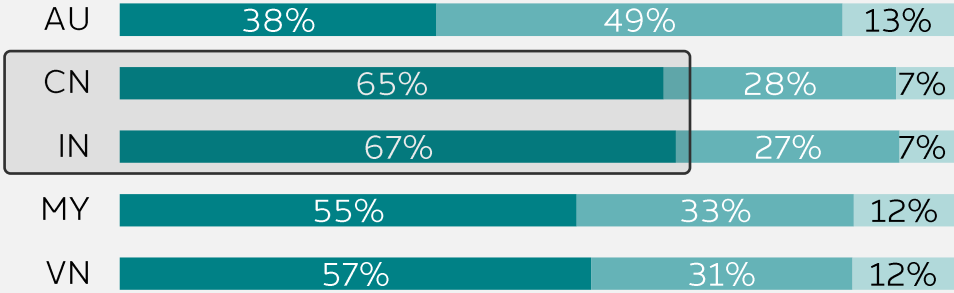
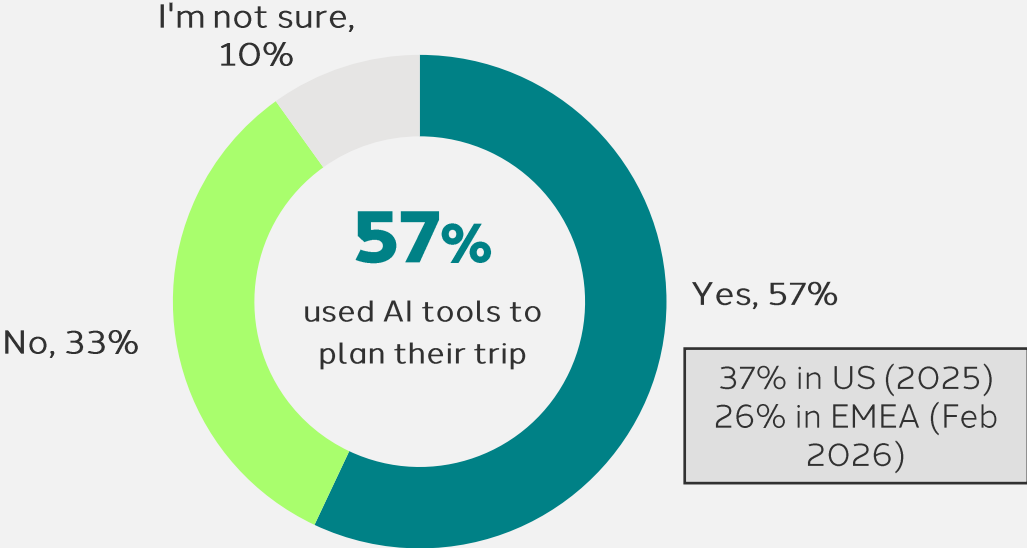
# USING AI FOR TRAVEL OPTIMIZATION



# USAGE OF AI FOR TRAVEL PLANNING IS HIGH IN APAC COMPARED TO THE US AND EMEA

Almost three out of five people in APAC have used AI tools for travel planning in the past 12 months, with those in India and China having the highest usage. Australia is an exception, with half of the travelers not using AI. Usage is high among Gen Z and Millennials with the digital penetration.

## HAVE YOU USED AI TOOLS FOR TRAVEL PLANNING IN THE PAST 12 MONTHS?



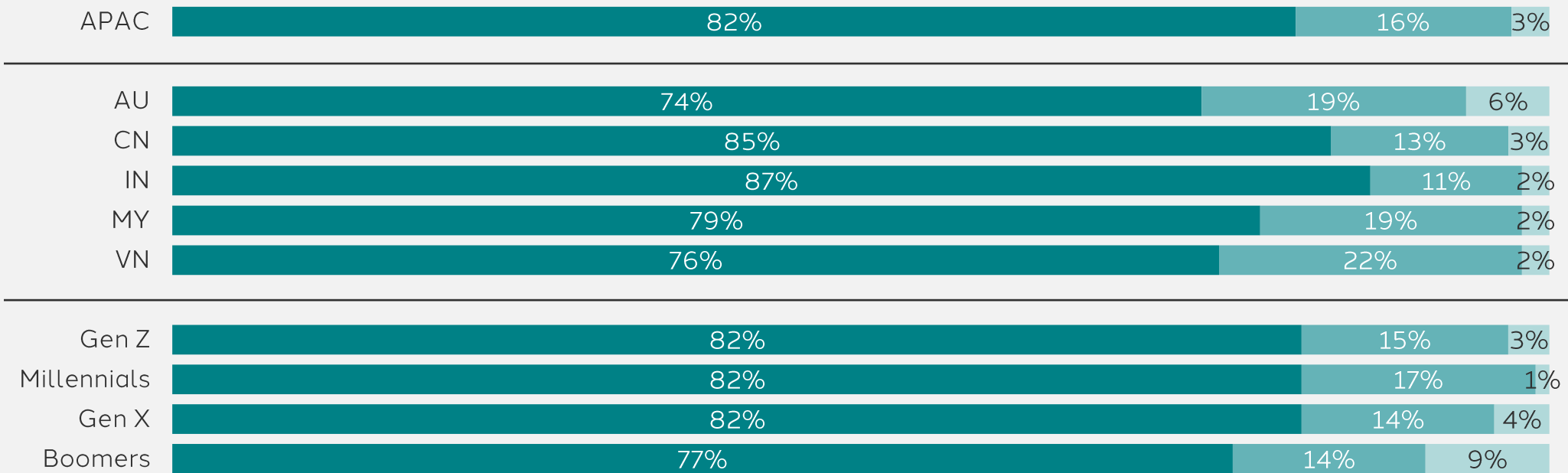
■ Yes   ■ No   ■ I'm not sure

# AI IN TRAVEL PLANNING IS MAINSTREAM, BUT STILL STUCK IN A SEARCH MINDSET

While over 80% of travelers in APAC actively use AI tools, their usage remains largely prompt-led and transactional rather than fully integrated into end-to-end planning.

## HOW YOU USED AI TOOLS TO PLAN YOUR TRAVEL IN THE PAST 12 MONTHS?

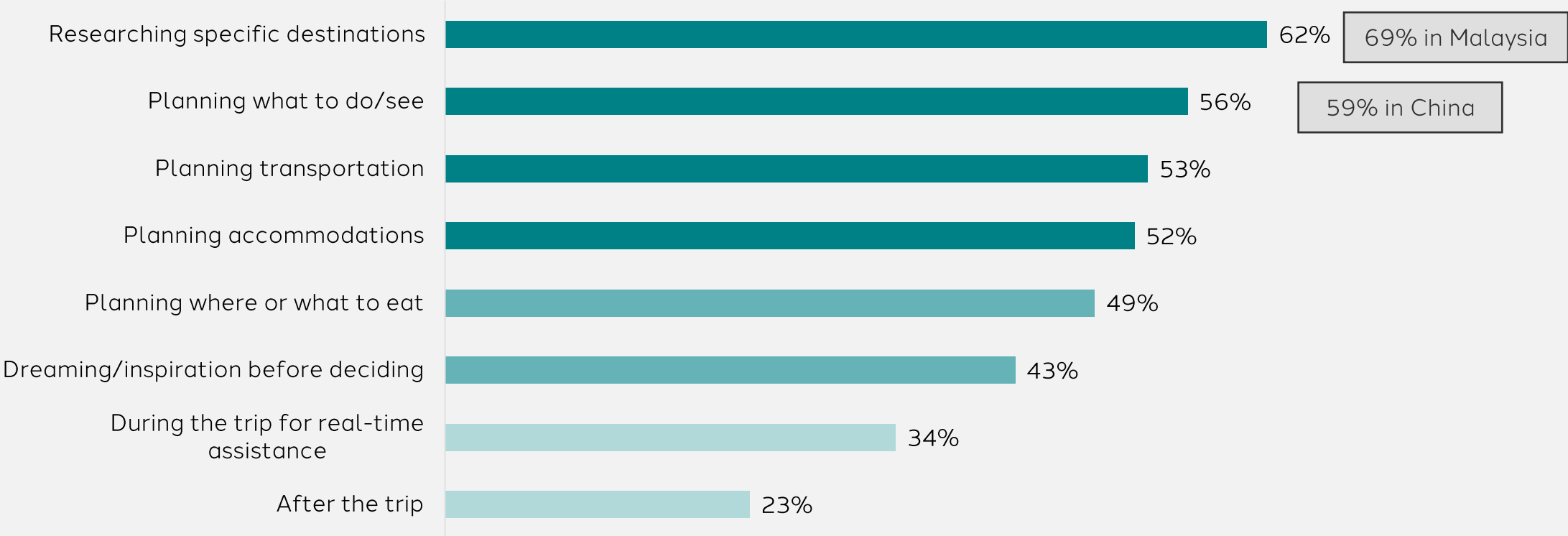
- Actively typed travel prompts or question in an AI chatbot
- Used embeded AI features in travel apps
- Believe AI is embedded in the tools



# AI IS HEAVILY USED FOR PRE-TRAVEL PLANNING BUT LESS DURING AND POST THE TRIP

AI usage is largely concentrated in the pre-trip planning phase, with the highest usage for destination research (62%). Engagement drops sharply during and after the trip, highlighting a significant gap in leveraging AI for real-time assistance and post-travel engagement.

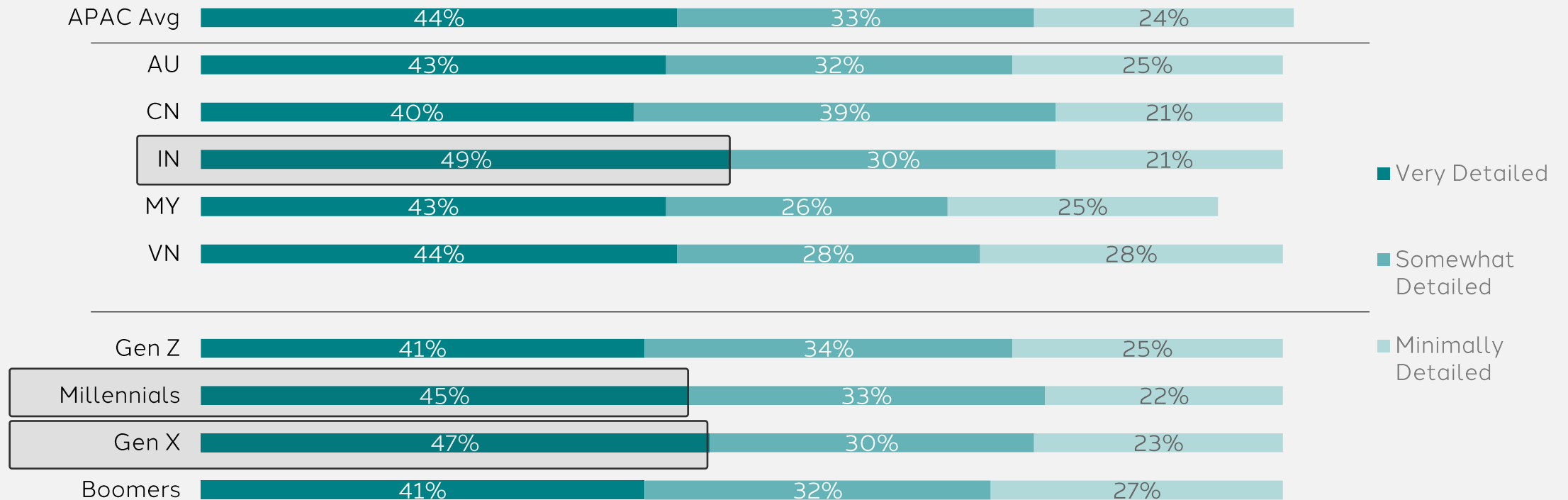
### WHICH PHASE(S) OF TRAVEL JOURNEY HAVE YOU USED AI TOOLS?



# AI ENGAGEMENT IS DETAILED DURING PLANNING, BECOMING PROGRESSIVELY LIGHTER ACROSS THE JOURNEY

Across APAC, nearly half of travelers engage AI with detailed instructions during discovery, this behavior is most prominent in India (49%). GenX (47%) and Millennials (45%) also reflect a planning-heavy mindset using AI tools.

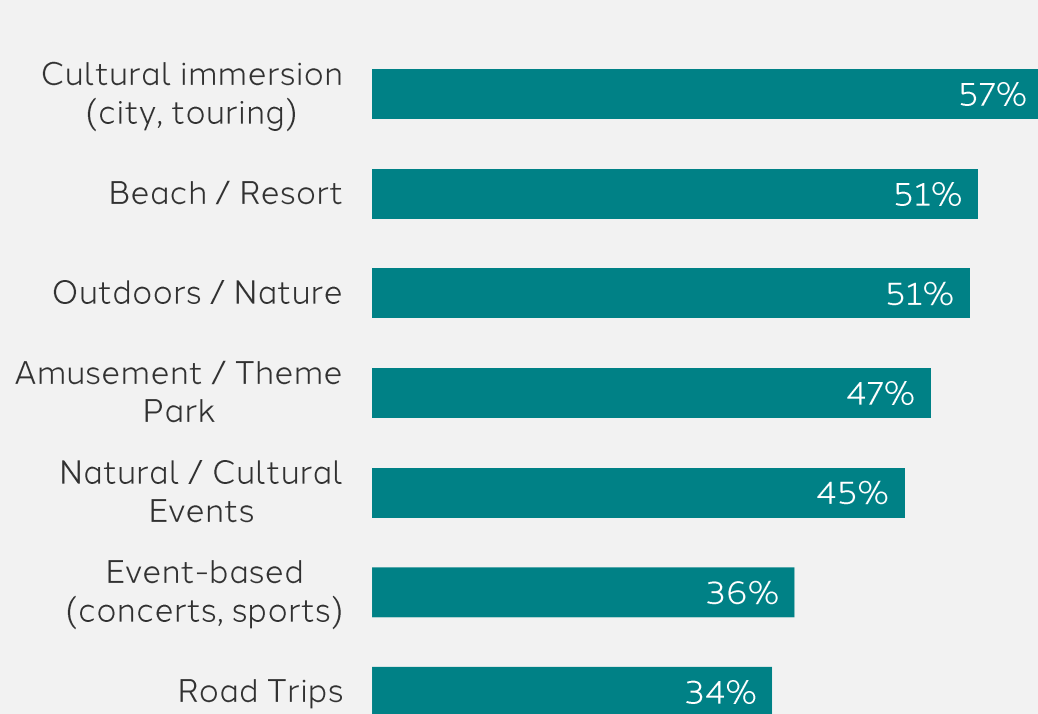
## HOW DETAILED ARE THE INSTRUCTIONS YOU GENERALLY PROVIDE TO THE AI CHATBOT OR AI TOOL THAT ASSISTS YOU?



# AI IS MOST HELPFUL FOR MULTI-EXPERIENCE TRIPS REQUIRING COORDINATION AND DISCOVERY

AI is widely used across cultural, beach, and nature trips in APAC, enabling more structured planning. While Australia, China, and Vietnam lean toward cultural experiences, India and Malaysia favor beach trips, with Malaysia also standing out for higher AI use in road trip planning.

## BASED ON EXPERIENCE, WHICH TYPES OF TRIPS IS AI THE MOST HELPFUL FOR PLANNING



■ #1 ■ #2 ■ #3

EXPERIENCE	AU	CN	IN	MY	VN
Cultural immersion	49%	59%	55%	52%	66%
Beach / Resort	40%	40%	57%	57%	61%
Outdoors / Nature	36%	49%	59%	47%	53%
Amusement Park	38%	56%	44%	44%	50%
Natural / Cultural Events	33%	40%	57%	45%	43%
Event-based	36%	27%	46%	31%	37%
Road Trips	33%	16%	44%	52%	25%

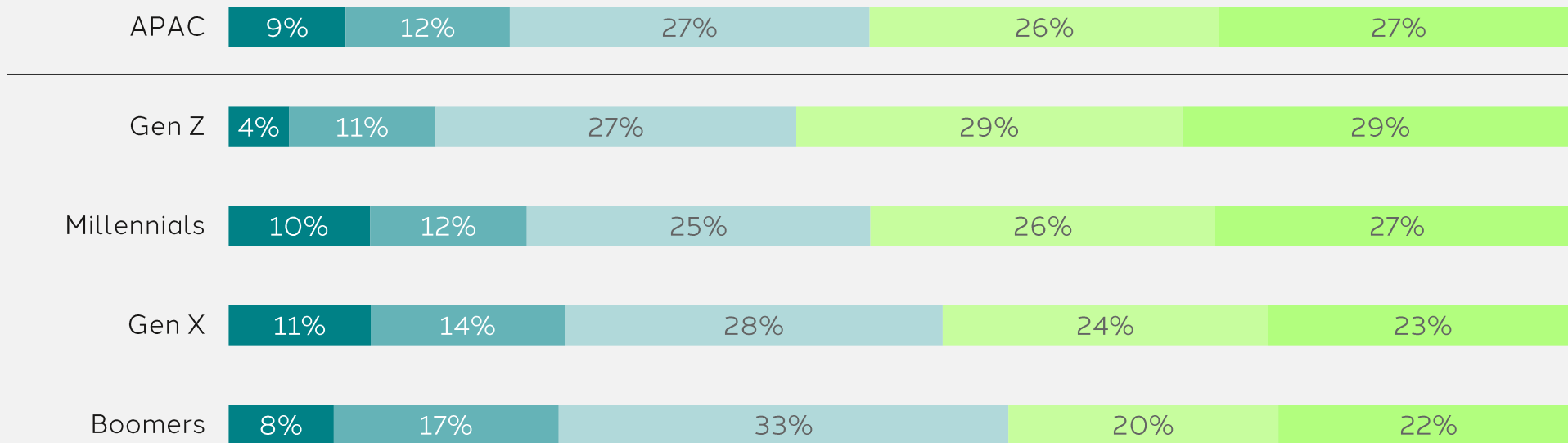


# AI TRAVEL RECOMMENDATIONS SKEW GENERIC ACROSS MARKETS, WITH LIMITED SUPPORT FOR TRULY UNIQUE EXPERIENCES

Across APAC markets and generations, travel recommendations cluster around generic and moderately curated suggestions, with “balanced” content emerging as the dominant middle ground.

## HOW WOULD YOU RATE THE UNIQUENESS OF TRAVEL EXPERIENCES AI RECOMMENDS?

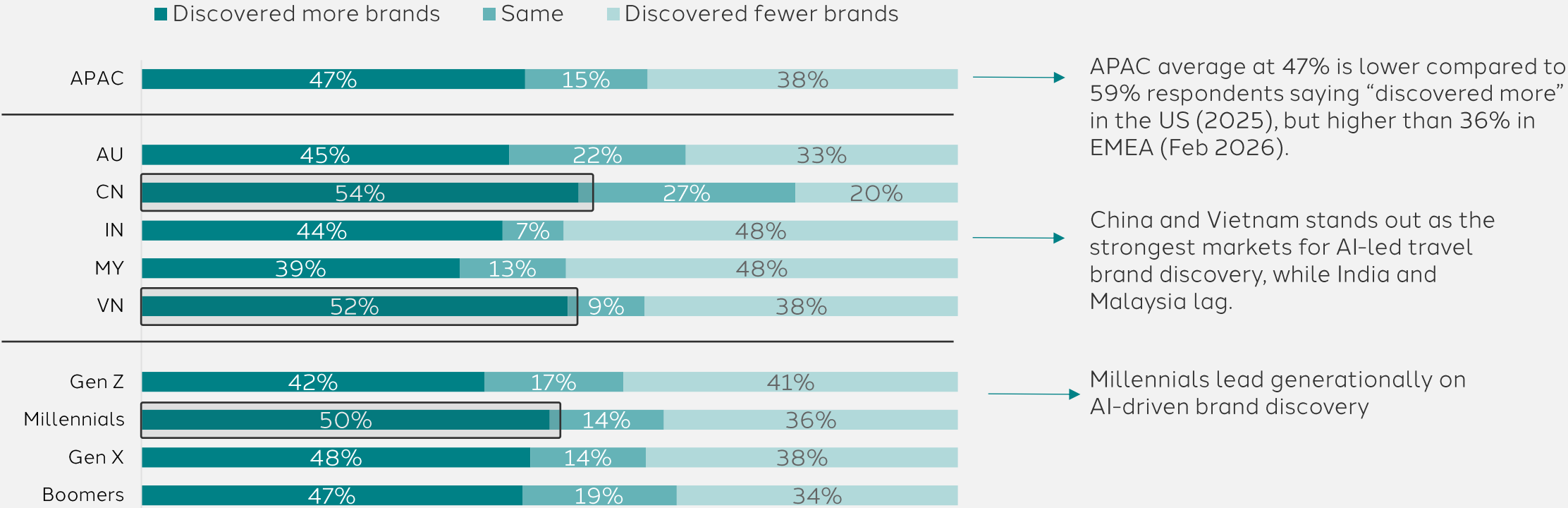
■ Very unique ■ Somewhat unique ■ Equal balance of common and unique suggestions ■ Somewhat generic ■ Very generic



# AI DRIVES TRAVEL BRAND DISCOVERY ACROSS APAC

AI-enabled search is facilitating new brand discovery, with nearly half of the travelers in APAC saying they now come across more new hotels, airlines, and tour companies when using AI tools. Notably, the discovery is high among the elderly generation, while Gen Z has mixed views.

## HOW HAS USING AI FOR TRAVEL CHANGED YOUR DISCOVERY OF NEW BRANDS?

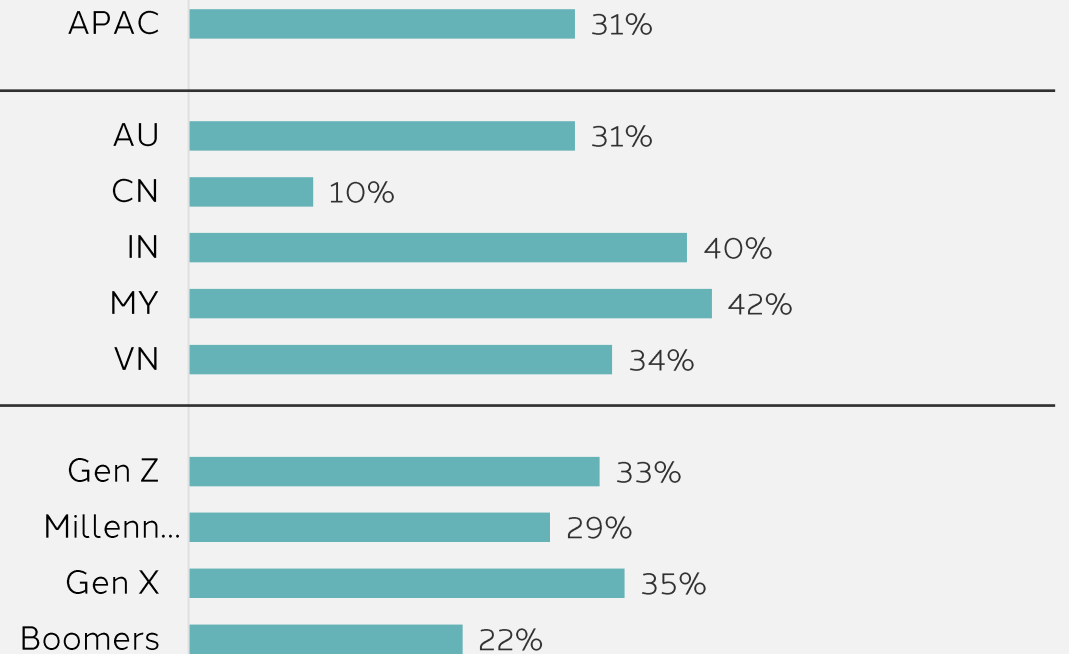
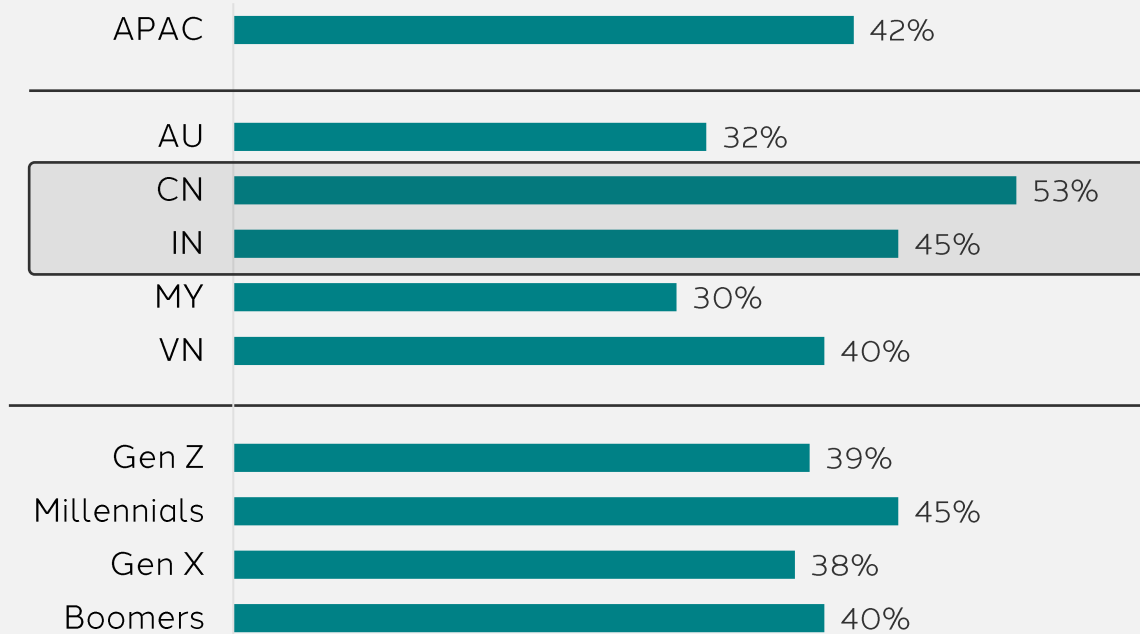


# AI STRENGTHENS BRAND LOYALTY IN APAC — HIGHER THAN THE US AND EMEA

Most of the APAC travelers (42%) say AI makes them more likely to stay with familiar brands, even as 31% feel less likely. The APAC average is close to the US (40% in 2025) but higher than EMEA (26% in Feb 2026). Loyalty is strongest in China and India and primarily amongst Millennials.

## MORE LIKELY TO STICK WITH FAMILIAR BRANDS

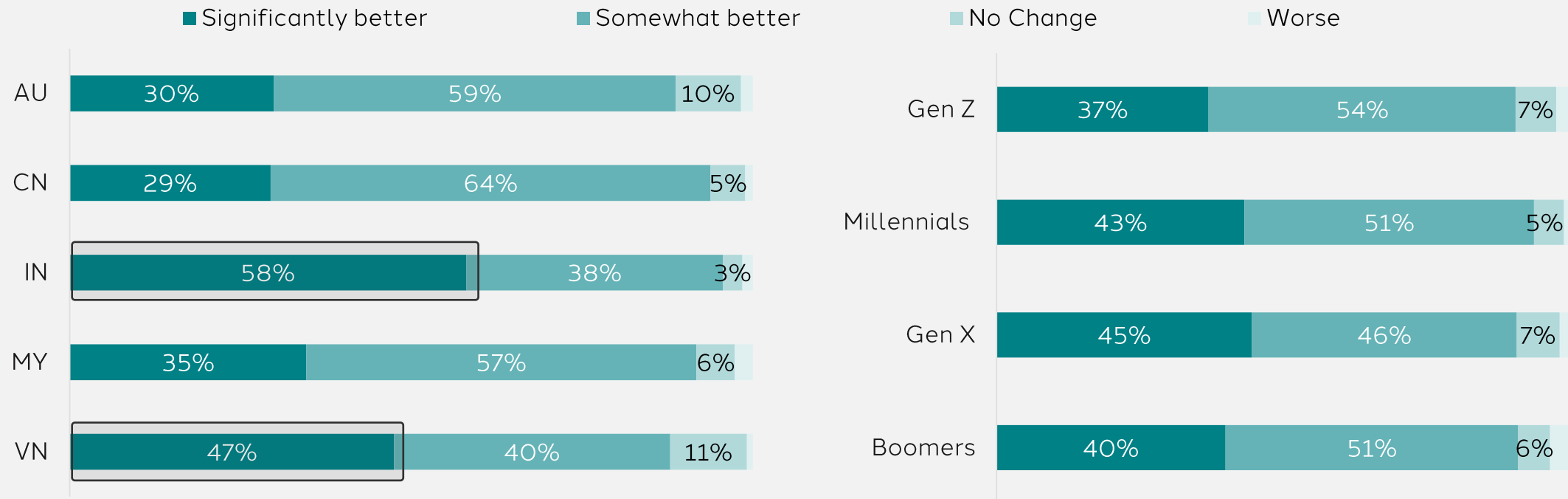
## LESS LIKELY TO STICK WITH FAMILIAR BRANDS



# 9 OUT OF 10 IN APAC HAVE A BETTER TRAVEL PLANNING EXPERIENCE WITH AI

AI-assisted planning is widely seen as improving the travel experience across APAC, with 58% of travelers in India and 47% in Vietnam reporting a significantly better experience.

## DO YOU FEEL THAT USING AI TO PLAN TRIPS MAKES YOUR TRAVEL EXPERIENCE BETTER OR WORSE?



# IMPLICATIONS FOR MARKETERS

## **AI HAS BECOME THE NEW DECISION GATEKEEPER.**

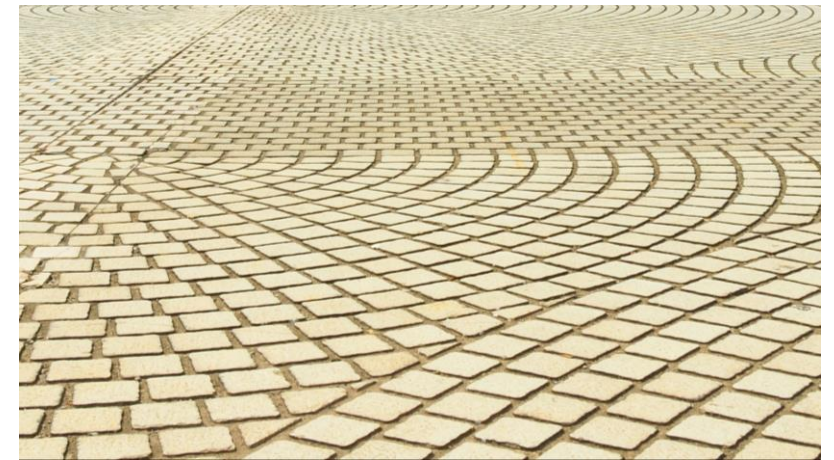
Across APAC, travelers are using AI primarily to validate, compare, and narrow choices before booking, not just to browse. This shifts the brand challenge from being visible to being decision-ready. Brands that clearly articulate fit, value, and relevance within AI-assisted journeys will win; those that rely on generic positioning or passive presence risk being filtered out early.

## **AI IS STILL STUCK IN PLANNING, BRANDS THAT EXTEND IT INTO THE JOURNEY WILL REDEFINE VALUE.**

While AI usage is high pre-trip, engagement drops sharply once travel begins—even though consumers agree AI improves their experience. Brands that extend AI into real-time support, local recommendations, and itinerary flexibility will shift from being planning utilities to trusted travel partners, especially as travelers balance value with seamless experiences.

## **EFFICIENCY IS EXPECTED—DISTINCT EXPERIENCES ARE WHAT WILL DIFFERENTIATE.**

Most travelers describe AI recommendations today as useful but generic, signaling a growing sameness in how brands surface. The opportunity for brands is to feed AI with richer experience narratives, not just inventory, so they stand out as meaningfully different when AI curates options for complex, multi-experience trips.



# LOOKING FOR INSPIRATION IN MEDIA & ENTERTAINMENT

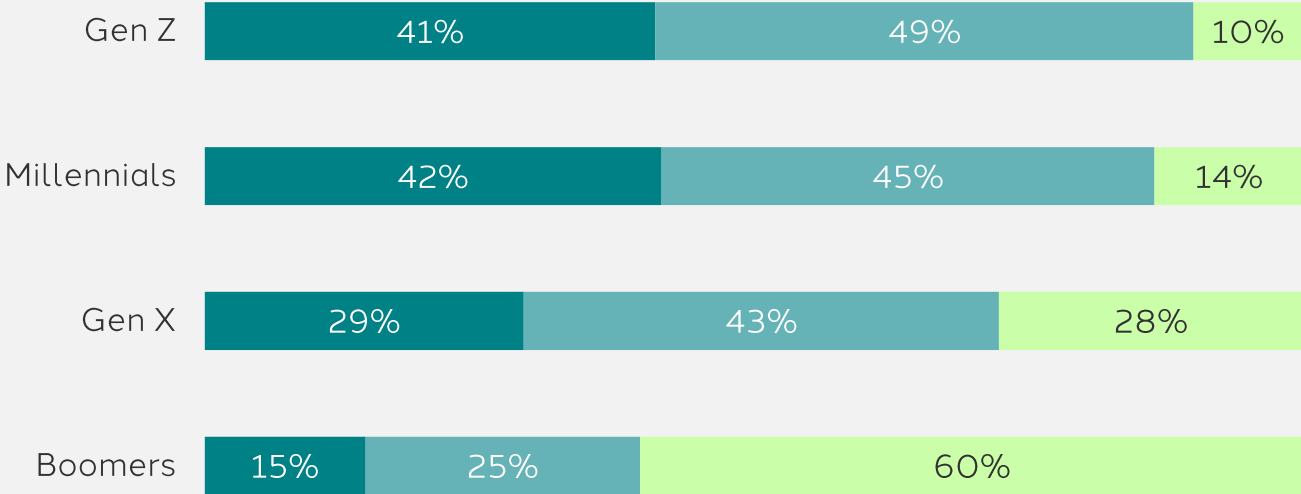
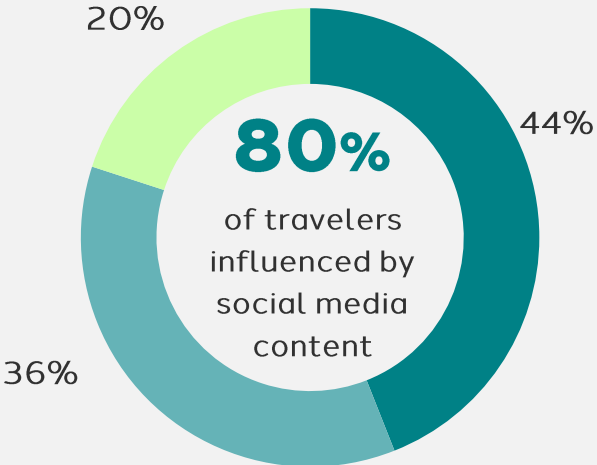


# SOCIAL MEDIA PLAYS A PIVOTAL ROLE IN SHAPING TRAVEL DESTINATION DECISIONS ACROSS GENERATIONS

4 out of 5 travelers say influencer or social media content either inspired a destination or reinforced their plans. Influence is strongest among Millennials and Gen Z, highlighting the growing role of digital inspiration, while Boomers show very low reliance on social media when planning trips.

## CHOSEN DESTINATION INFLUENCED/INSPIRED BY SOCIAL MEDIA/INFLUENCER CONTENT

- Social media/influencer content gave idea for the destination
- Already had a destination in mind social/influencer content helped finalize it
- Social media/influencer content had no role in inspiring my travel plans



# TRAVEL INSPIRATION IS ANCHORED IN VALUE AND EXPERIENCE-LED CONTENT ON SOCIAL MEDIA

Travel inspiration is shaped by a mix of value-driven content and experience-led discovery. Malaysia shows a strong skew toward budget travel (33%), while China and Australia demonstrate a higher affinity for food-led inspiration (+20%) and Vietnam leans on health and wellness (30%).

## TYPE OF SOCIAL MEDIA/INFLUENCER CONTENT THAT INSPIRES TRAVELERS THE MOST WHEN IT COMES TO MAKING TRAVEL DECISIONS

■ #1 ■ #2 ■ #3

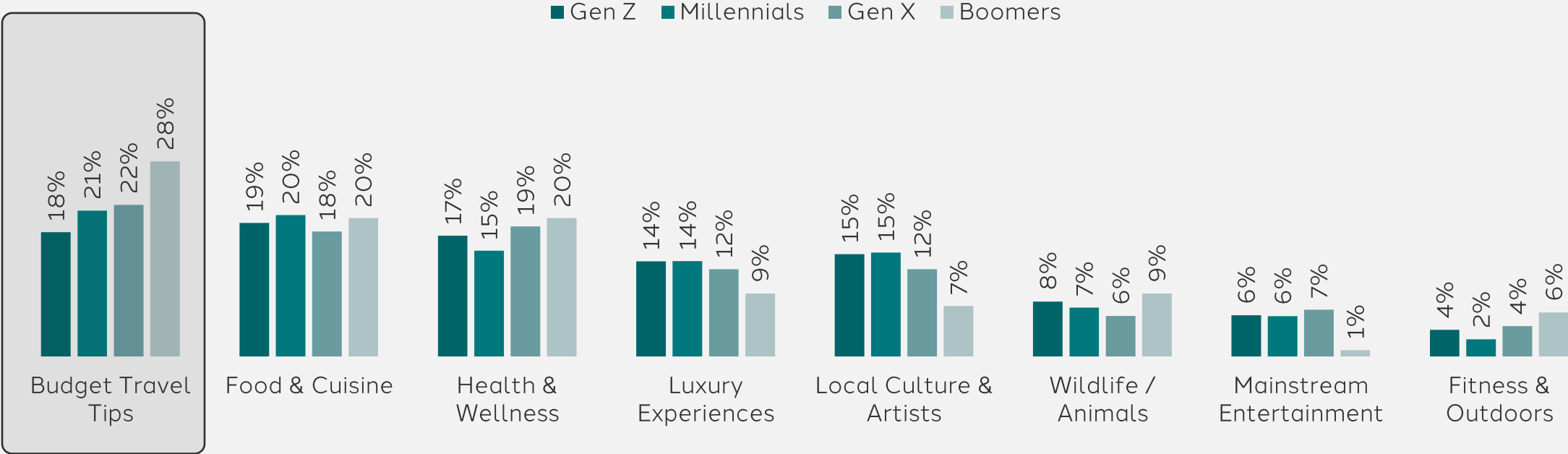
Content Type	APAC	AU	CN	IN	MY	VN
Budget travel tips	20%	16%	23%	20%	33%	9%
Food/cuisine content	19%	20%	24%	11%	26%	18%
Focused on health & wellness	17%	18%	12%	15%	10%	30%
Featuring local artists/cultural trends	14%	13%	21%	15%	9%	10%
Focused on luxury experiences	13%	17%	8%	18%	8%	16%
Featuring animals/wildlife	7%	7%	6%	10%	6%	5%
Influencer content tied to mainstream entertainment	6%	6%	3%	7%	6%	7%
Fitness/outdoors-focused content	3%	3%	3%	4%	2%	5%



# ACROSS GENERATIONS, BUDGET TRAVEL AND FOOD CONTENT DOMINATES INSPIRATION

Budget travel content emerges as the strongest driver overall, peaking among Boomers (28%) while remaining consistently high across all generations. Food & cuisine is a cross-generational anchor (18–20%), signaling its role as a core experiential hook in travel decision-making.

## TYPE OF SOCIAL MEDIA/INFLUENCER CONTENT THAT INSPIRES TRAVELERS THE MOST WHEN IT COMES TO MAKING TRAVEL DECISIONS



Note: Includes only the respondent engaging with social media



# SOCIAL MEDIA INSPIRES TRAVEL DECISIONS, BUT NEEDS VALIDATION

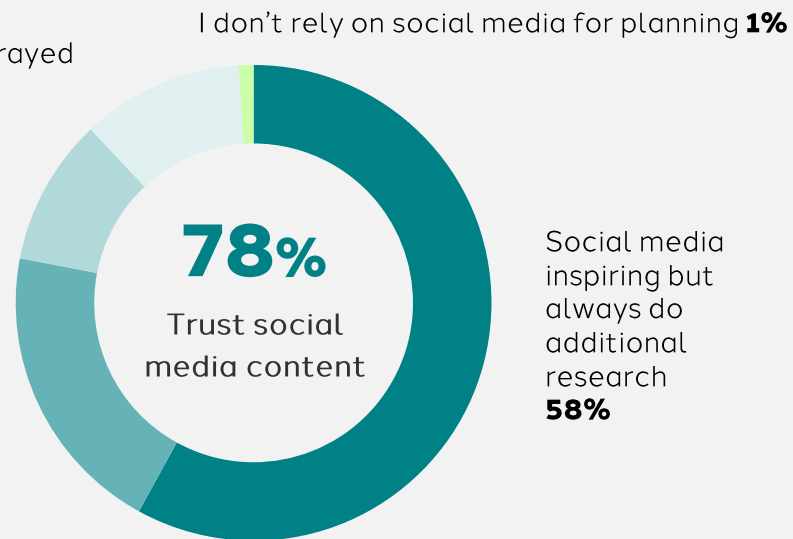
While social media inspires travel decisions across APAC, reliance varies by market. Malaysia shows the highest influence (67%), whereas India has the least influence (48%), with other markets like China and Vietnam reflecting moderate reliance coupled with a stronger need for validation.

## TRUST DESTINATIONS AS PORTRAYED ON SOCIAL MEDIA/INFLUENCER CONTENT WHEN MAKING TRAVEL DECISIONS

Skeptical about how destinations are portrayed on social media **10%**

Look for "reality check" content before deciding **11%**

Trust social media portrayals and often plan trips based on them **20%**



Note: Includes only the respondent engaging with social media

## "I FIND SOCIAL MEDIA INSPIRING BUT ALWAYS DO ADDITIONAL RESEARCH"

AU 58%

CN 61%

IN 48%

MY 67%

VN 56%

Gen Z 58%

Millennials 57%

Gen X 60%

Boomers 57%

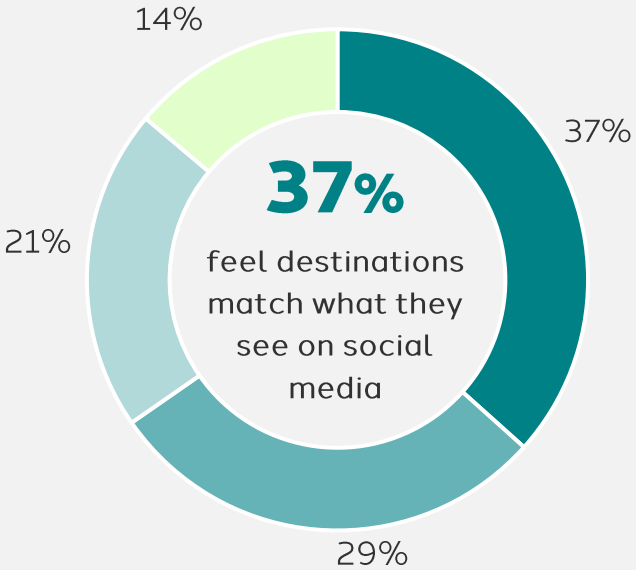


# REALITY OFTEN OUTPERFORMS SOCIAL MEDIA IN TRAVEL EXPERIENCES

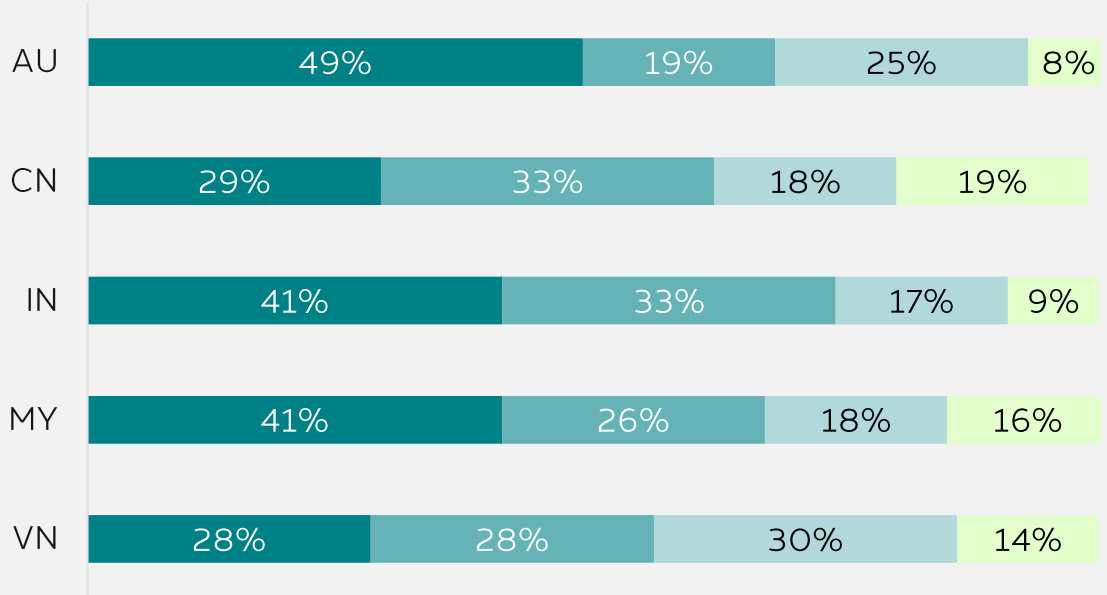
While 37% of travelers say destinations match what they see online, a majority (50%) perceive a gap where experiences either exceed or fall short of expectations. Travelers in Australia, India, and Malaysia have the strongest alignment between online portrayal and in-person experience.

## HOW DO YOU FEEL ABOUT THE DIFFERENCE BETWEEN HOW DESTINATIONS APPEAR ON SOCIAL MEDIA VERSUS THE REALITY YOU EXPERIENCE WHEN TRAVELING?

- Reality
- Destinations look better on social media than in person
- Surprised when places are better in person than portrayed online
- Destinations better in person, sometimes better on social media



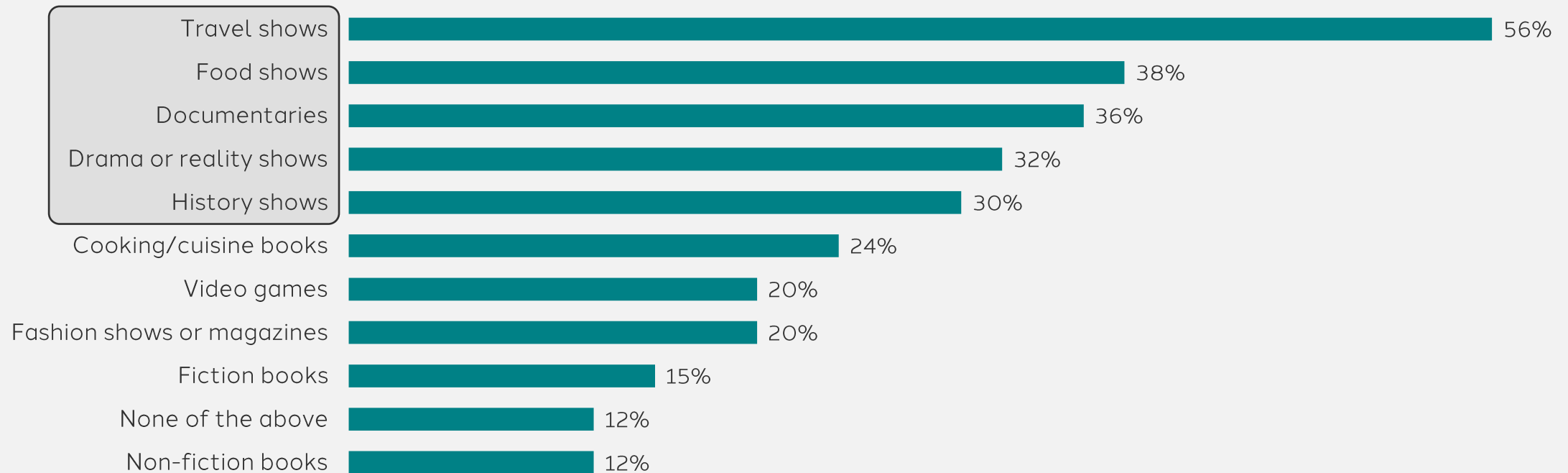
Note: Includes only the respondent engaging with social media



# VISUAL CONTENT DOMINATES TRAVEL DECISION-MAKING, LED BY TRAVEL & FOOD SHOWS

Travel planning is primarily driven by visually immersive content formats, with travel shows significantly outperforming all other content types, while text-based and niche formats play a limited role.

## HAVE YOU EVER MADE TRAVEL PLANS OR CHOSEN A TRAVEL DESTINATION AFTER READING, VIEWING, OR PLAYING ANY OF THE FOLLOWING TYPES OF CONTENT?



*Note: Includes only the respondent engaging with influencers*



# ENGAGEMENT VARIES BY MARKET MATURITY AND GENERATION

Travel shows lead across all markets. MY (63%) and IN (62%) show significantly higher engagement. At the same time, younger audiences drive engagement also through entertainment and food content, whereas older cohorts remain more selective and skew toward functional viewing.

## HAVE YOU EVER MADE TRAVEL PLANS OR CHOSEN A TRAVEL DESTINATION AFTER READING, VIEWING, OR PLAYING ANY OF THE FOLLOWING TYPES OF CONTENT?

■ #1 ■ #2 ■ #3

Top 5 Content Type	AU	CN	IN	MY	VN	Gen Z	Millennials	GenX	Boomers
Travel shows	43%	54%	62%	63%	59%	53%	61%	55%	49%
Food shows	21%	44%	38%	43%	44%	38%	44%	35%	18%
Documentaries	29%	39%	40%	43%	26%	33%	37%	37%	34%
Drama or reality shows	19%	30%	33%	35%	41%	35%	36%	27%	13%
History shows	16%	27%	41%	32%	32%	29%	31%	31%	20%

Note: Includes only the respondent engaging with influencers



# IMPLICATIONS FOR MARKETERS

## **LEVERAGE SOCIAL MEDIA AS A TOOL FOR INSPIRATION AND CONFIDENCE BUILDING.**

With 4 in 5 travelers in APAC acknowledging that social and influencer content influences their travel decisions, marketers must focus on crafting social media that not only inspires but also builds trust. Since most travelers use social media to gain confidence rather than as the final booking authority, brands should blend inspirational storytelling with reassuring content that validates choices, especially in markets sensitive to value and risk.

## **CUSTOMIZE SOCIAL MEDIA CONTENT TO REFLECT MARKET-SPECIFIC INTERESTS.**

Social media inspiration varies significantly across APAC markets. While Malaysia favors budget travel, China emphasizes food and cuisine, Vietnam focuses on health and wellness, and India responds to both value and luxury cues. Marketers should tailor their social media narratives to these unique motivations, ensuring content resonates locally by highlighting relevant cultural, experiential, or value-driven themes instead of generic travel imagery.

## **INFLUENCE IS SHAPED BY CONTENT ECOSYSTEMS, NOT PLATFORMS ALONE.**

Travel inspiration is often shaped well before active planning begins, with travel shows leading influence across APAC, supported by food shows, documentaries, etc. Markets such as India and Malaysia show high engagement with travel and food-led content formats, while China skews toward food and nature-driven discovery. For marketers, this expands the role of social beyond feeds/influencers to sustained presence within broader entertainment hubs that shape early consideration, long before consumers search or book.



# HOW APAC CONSUMERS ARE CHOOSING WHERE TO TRAVEL

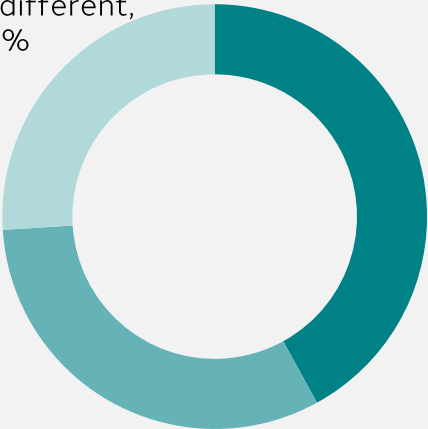


# IN APAC, TRAVEL IS VIEWED AS A MIX OF ROUTINE AND ESCAPE

42% of APAC consumers see travel as a balance between routine and escape, though perceptions differ widely across markets. This sentiment is strongest in China, while Vietnam shows the lowest alignment, where, similar to India, many view travel as an extension of daily life.

## HOW ASIAN CONSUMERS DESCRIBE TRAVEL?

Mostly a chance to step away and be someone different, 26%

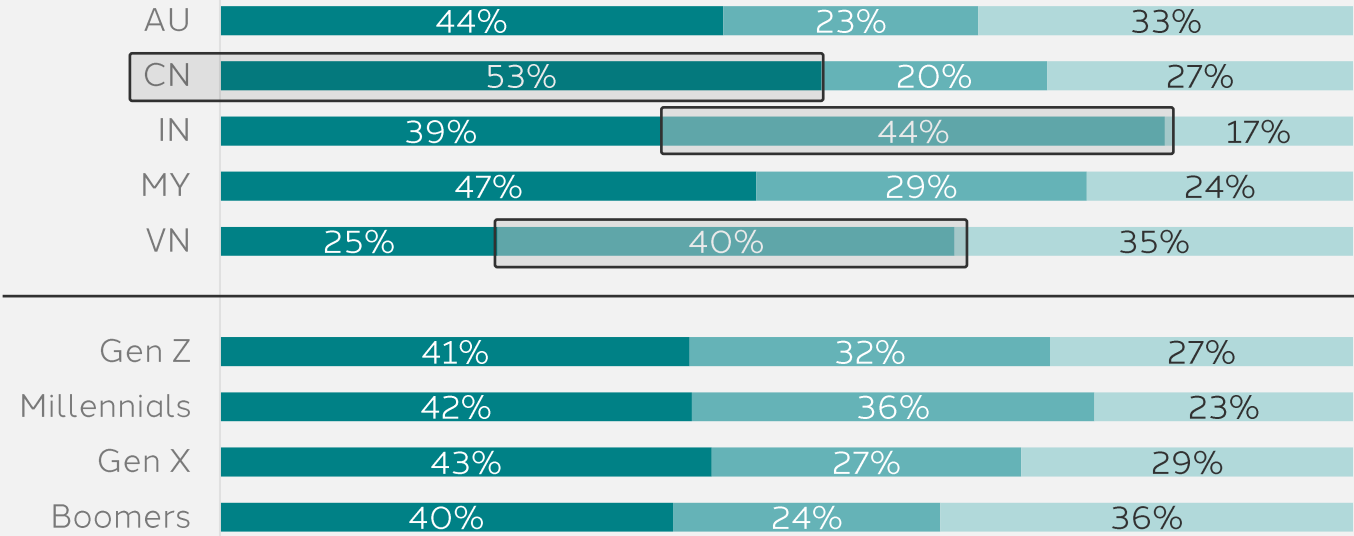


A mix of routine and escape, 42%

Mostly a continuation of my everyday life, 32%

## TRAVEL MINDSET BY MARKETS & GENERATIONS

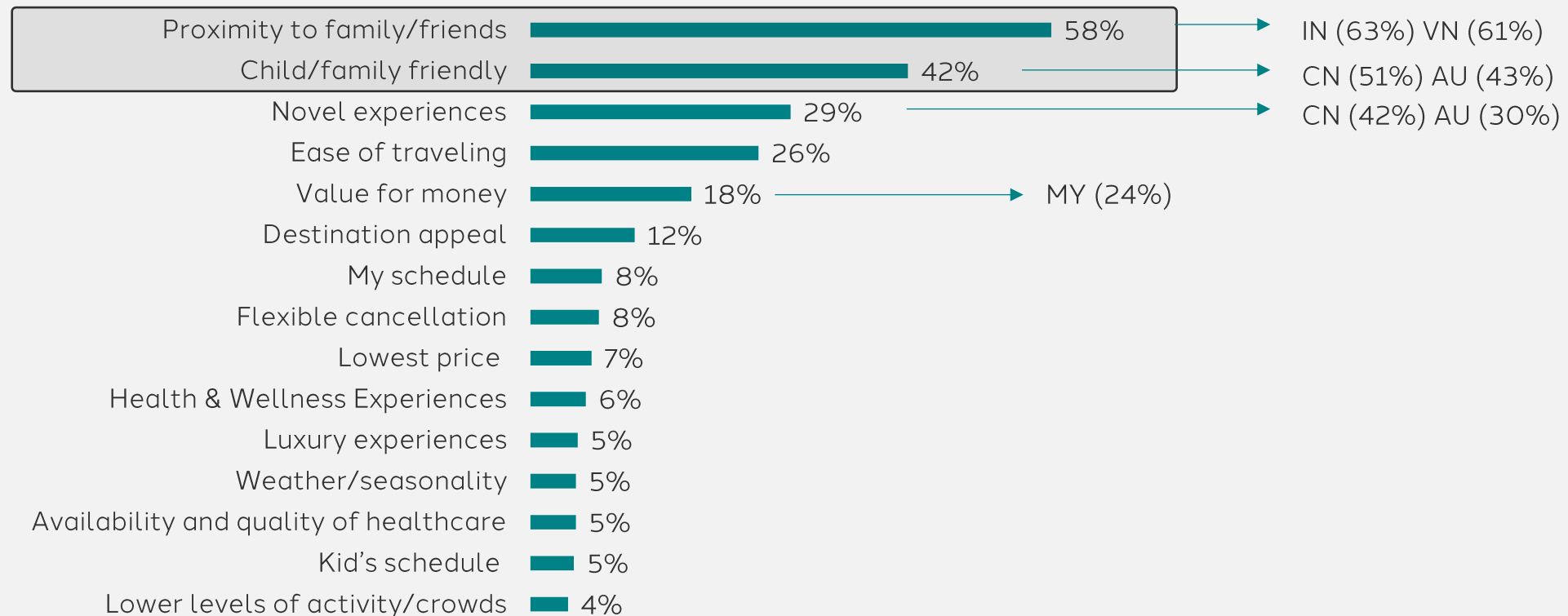
- A mix of routine and escape
- Mostly a continuation of my everyday life
- Mostly a chance to step away and be someone different



# TRAVEL CHOICES ARE INFLUENCED BY SOCIAL CONNECTIONS

Proximity to family and friends is the strongest driver of travel planning, with 58% ranking it as their top consideration, followed by choosing a destination that is child- or family-friendly. The trend is commonly seen across the countries and generations surveyed.

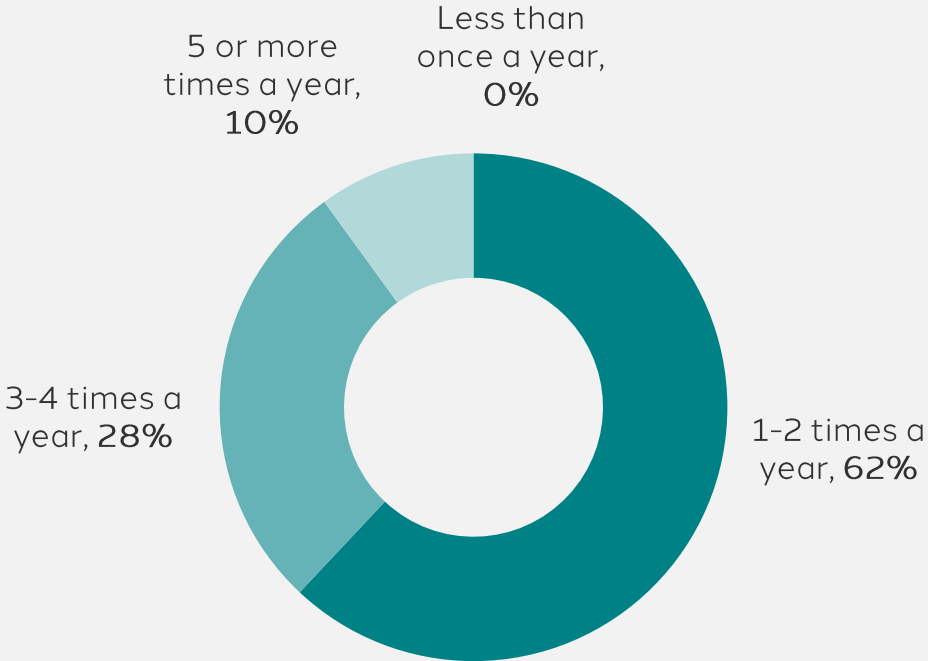
## WHAT ARE THE TOP FACTORS YOU CONSIDER WHILE MAKING TRAVEL PLANS?



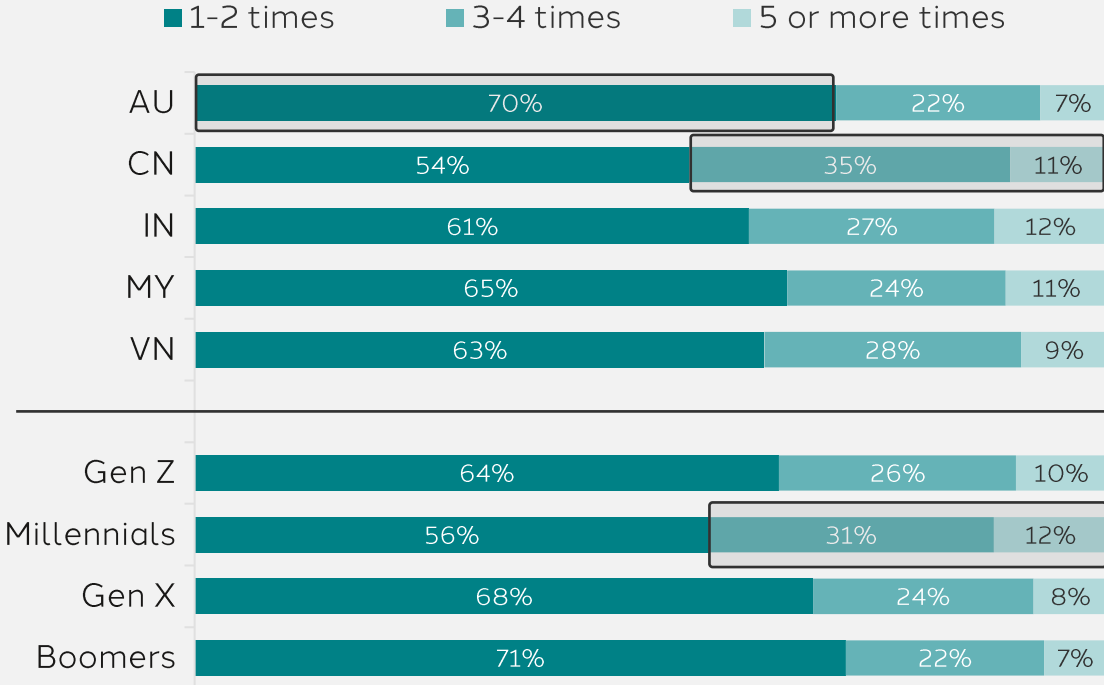
# IN APAC, LEISURE TRIPS ARE A ONCE OR TWICE A YEAR TREAT

6 in 10 people in the region take 1–2 leisure trips yearly, with few traveling often. Millennials, as a demographic group, exhibit a higher frequency of travel. In APAC, higher travel frequency is more pronounced in China, indicating a growing group of active leisure travelers. Conversely, Australian consumers are more likely to do 1-2 trips.

## HOW OFTEN DO YOU TRAVEL FOR LEISURE?



## HOW OFTEN DO YOU TRAVEL FOR LEISURE IN A YEAR?

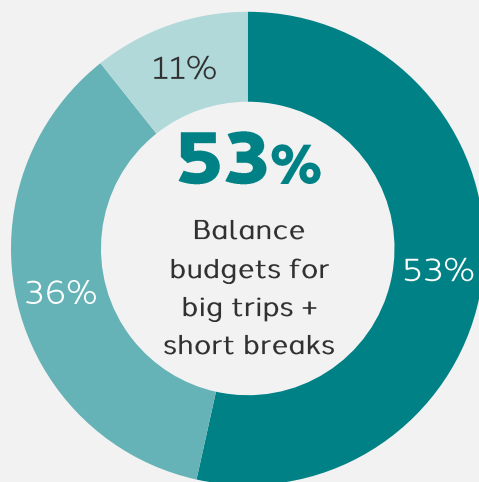


# TRAVELERS PLAN TO BALANCE BIG TRIPS WITH FREQUENT GETAWAYS

In APAC, most consumers plan to balance spending between one major leisure trip and shorter breaks in the coming year, signaling a desire to sustain travel frequency without overextending budgets. This mindset dominates across markets and generations, while over 40% consumers in India and Malaysia (particularly Gen Z) expect to save for one big or premium trip.

## APPROACH TO PLANNING LEISURE TRIPS IN THE NEXT YEAR

- Balance budgets between major trips and quick getaways
- Save for one longer or premium vacation
- Spread budget across many short or cheap trips



## APPROACH TO PLANNING LEISURE TRIPS IN THE NEXT YEAR, BY COUNTRY & GENERATIONS

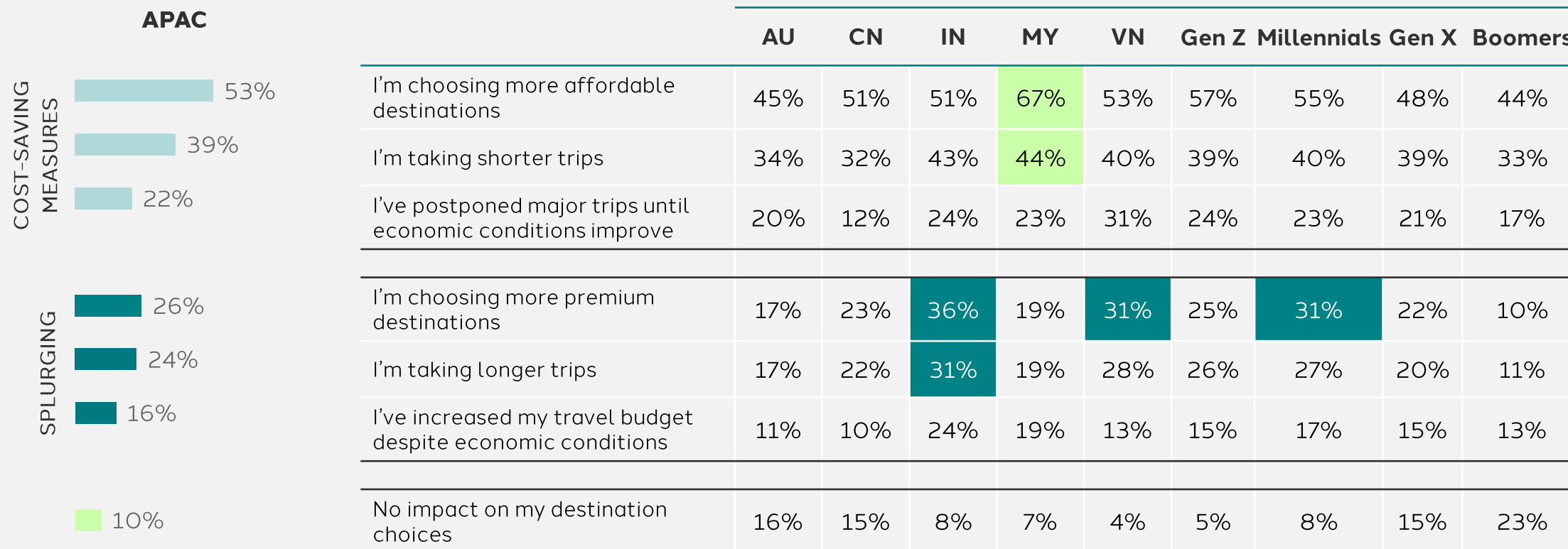
	AU	CN	IN	MY	VN	Gen Z	Millennials	Gen X	Boomers
Save for one big/ premium trip	36%	31%	40%	41%	31%	42%	34%	33%	36%
Balance budgets for big trip + short breaks	50%	59%	48%	47%	63%	49%	56%	55%	50%
Spread budget on many short/ cheap trips	14%	9%	11%	12%	6%	9%	10%	12%	14%



# THEY OPT FOR AFFORDABLE TRIPS DUE TO ECONOMIC UNCERTAINTY

Travel intentions are resilient despite economic uncertainty, with half of the APAC travelers adjusting plans toward affordable and shorter trips. While trade downs are high in Malaysia, over 30% of people in India and Vietnam plan premium trips.

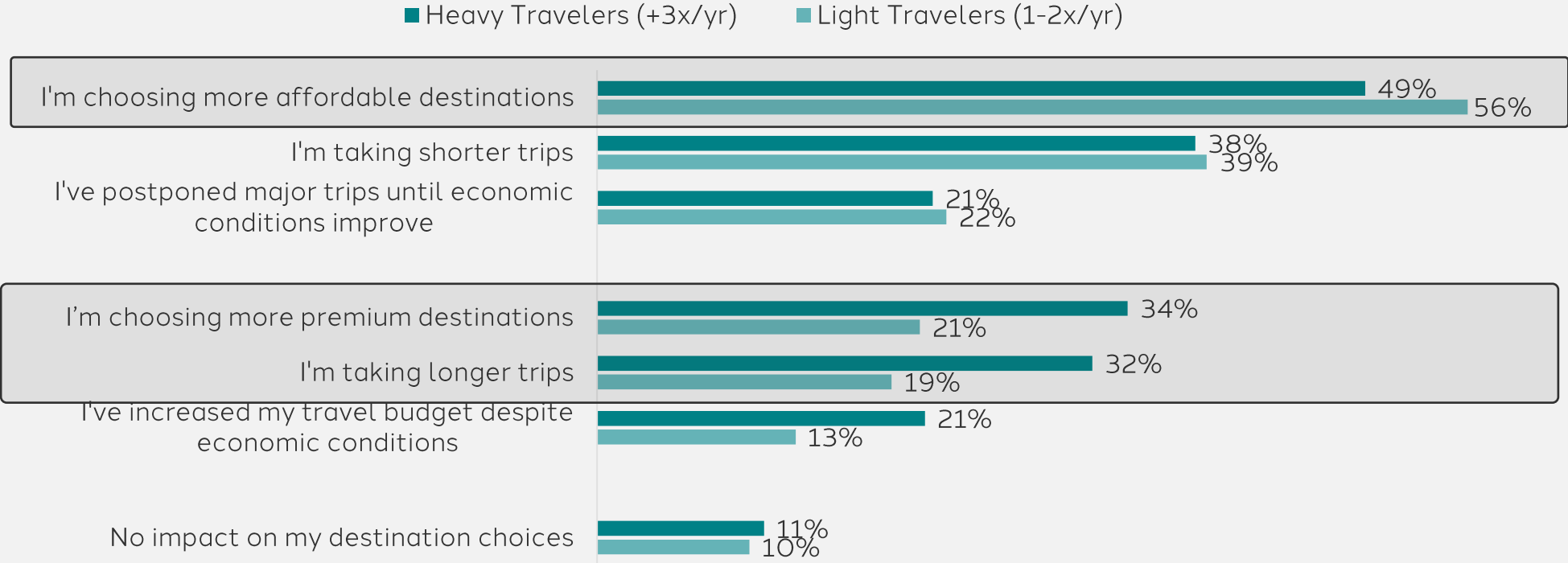
## HOW HAS THE ECONOMIC ENVIRONMENT AFFECTED YOUR TRAVEL DECISIONS FOR NEXT 6-12 MONTHS?



# WHILE MAJOR TRAVELERS PRIORITIZE AFFORDABILITY, FREQUENT TRAVELERS ARE VALUE-CONSCIOUS YET ASPIRATIONAL

Nearly half of frequent travelers are shifting towards affordable trips in response to economic pressures, but a notable one-third still intend to splurge on premium destinations or longer vacations.

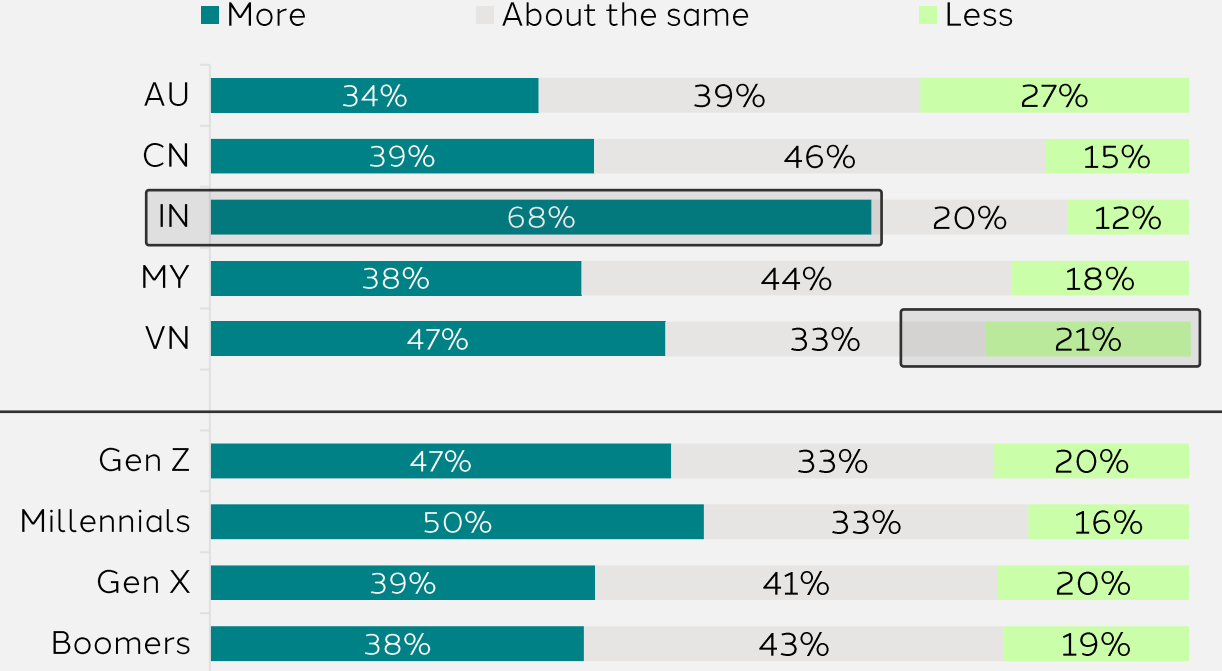
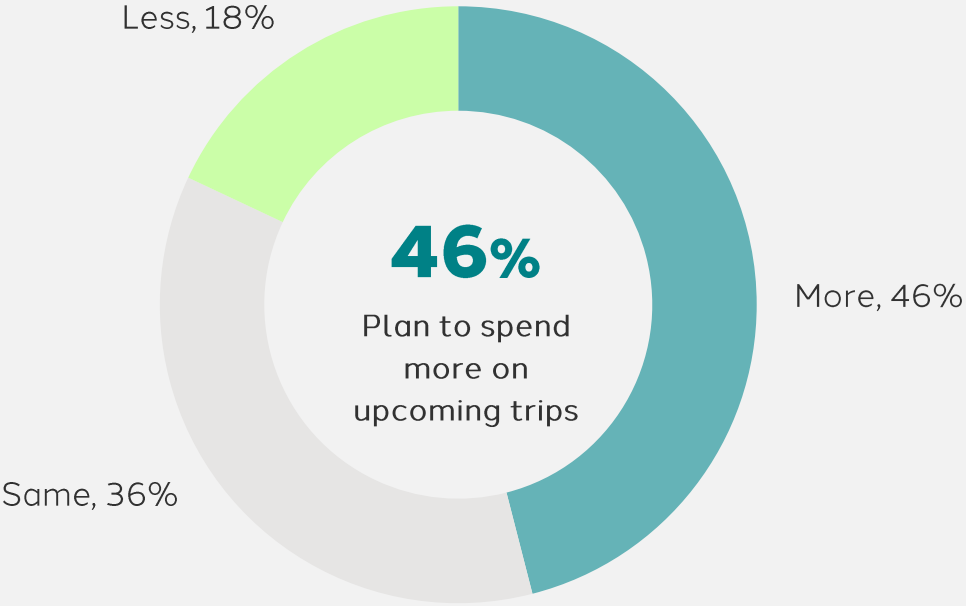
## HOW HAS THE ECONOMIC ENVIRONMENT AFFECTED YOUR TRAVEL DECISIONS FOR NEXT 6-12 MONTHS?



# MORE THAN HALF OF APAC TRAVELERS PLAN TO SPEND HIGHER ON SUMMER TRAVEL THIS YEAR

India emerges as the strongest growth market, with over two-thirds planning to increase summer travel spend, signaling a willingness to trade up on experiences. On the other hand, Australia stands out as the most cautious market, driven by the highest intent to reduce spend.

DO YOU PLAN TO SPEND MORE / LESS / THE SAME ON SUMMER TRAVEL VS. LAST YEAR?



# GEOPOLITICAL TENSIONS ARE A KEY FACTOR INFLUENCING APAC TRAVEL DECISIONS

Travel decisions across APAC are largely influenced by geopolitical tensions (60%), followed by currency pressures (36%). Nearly one-third of travelers in Vietnam and India worry about their country's perception as they plan to travel to geopolitically tense destinations. Conversely, consumers in Australia over-index on avoiding certain destinations based on their political views.

## REGIONAL TENSIONS

# 60%

Of APAC travelers avoid visiting specific countries due to geopolitical tensions in those regions when planning future travel.

**Highest: Malaysia & Vietnam (63%)**  
**Lowest: Australia (56%)**

## CURRENCY CONCERNS

# 36%

Of APAC travelers avoid certain destinations because the currency exchange rate is currently disadvantageous, making travel more expensive.

**Highest in: Malaysia (48%) & India (38%)**  
**Lowest: China (28%)**

## POLITICAL CONCERNS

# 35%

Of APAC travelers avoid visiting destinations because they disagree with the politics of the country's leadership.

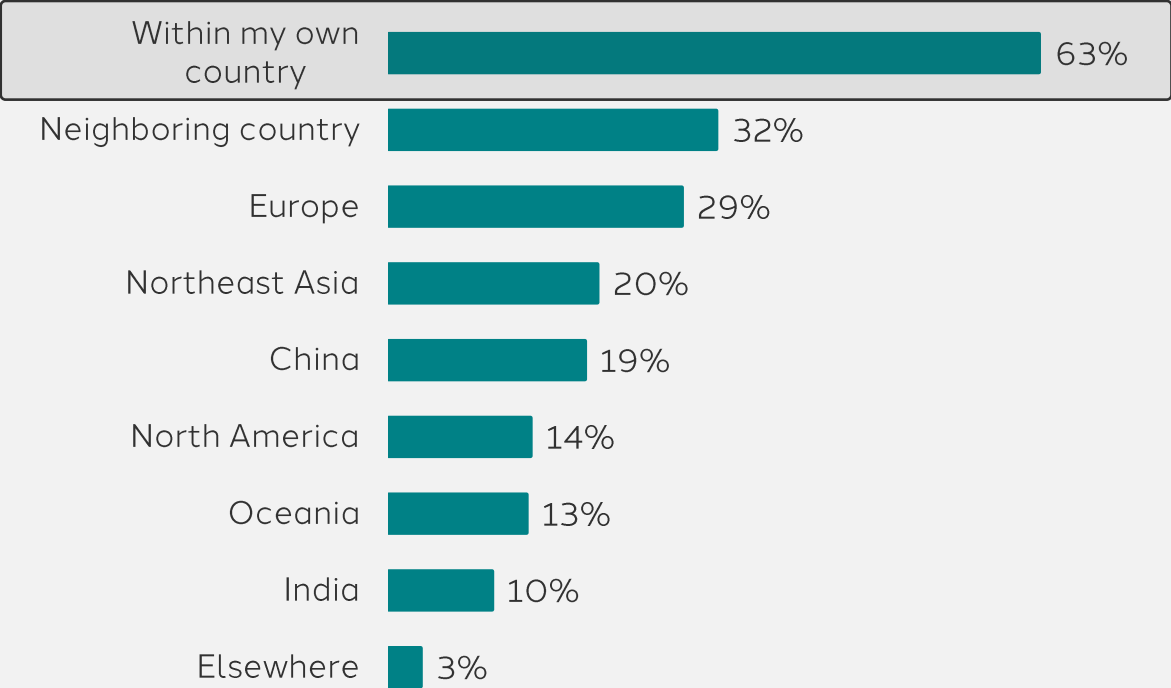
**Highest in: India (40%) & Australia (38%)**  
**Lowest: Malaysia & China (31%)**



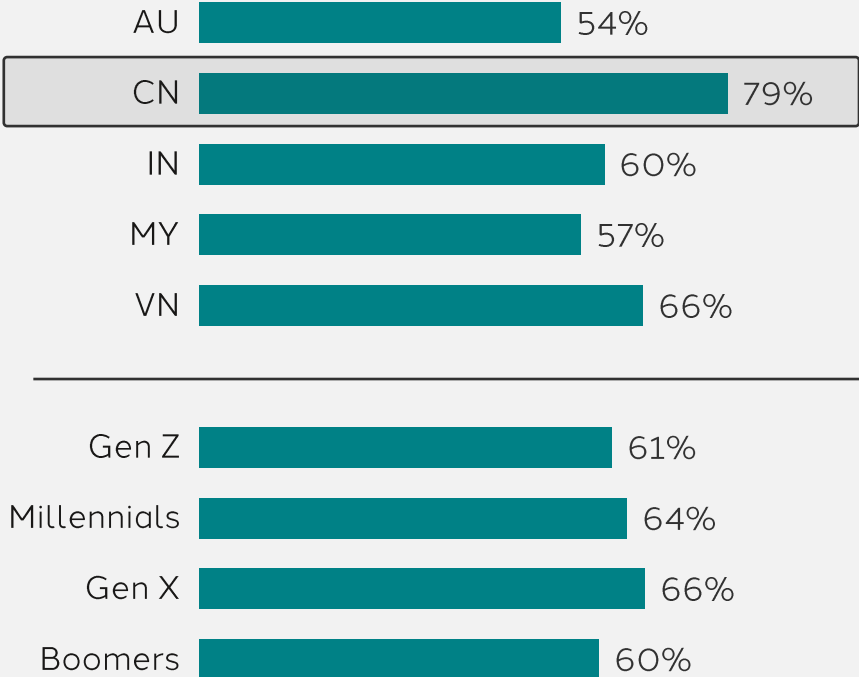
# IN APAC, TRAVEL IS VIEWED AS A MIX OF ROUTINE AND ESCAPE

In APAC, nearly two-thirds of travelers prefer traveling within their own country. China stands out with the highest domestic preference, while generational patterns remain largely consistent.

## WHICH LEISURE TRIPS HAVE YOU PLANNED IN THE NEXT 12 MONTHS?



## “TRAVEL WITHIN MY OWN COUNTRY”



# NEIGHBORING COUNTRY AND EUROPE ARE THE OTHER MOST PLANNED DESTINATIONS

Neighboring countries are the second-most preferred choice in China, Malaysia, and Vietnam, underscoring the importance of proximity. In contrast, travelers in Australia and India lean toward long-haul or premium destinations, with Europe ranking second amongst their choices.

## TOP THREE LEISURE DESTINATIONS PLANNED FOR NEXT 12 MONTHS

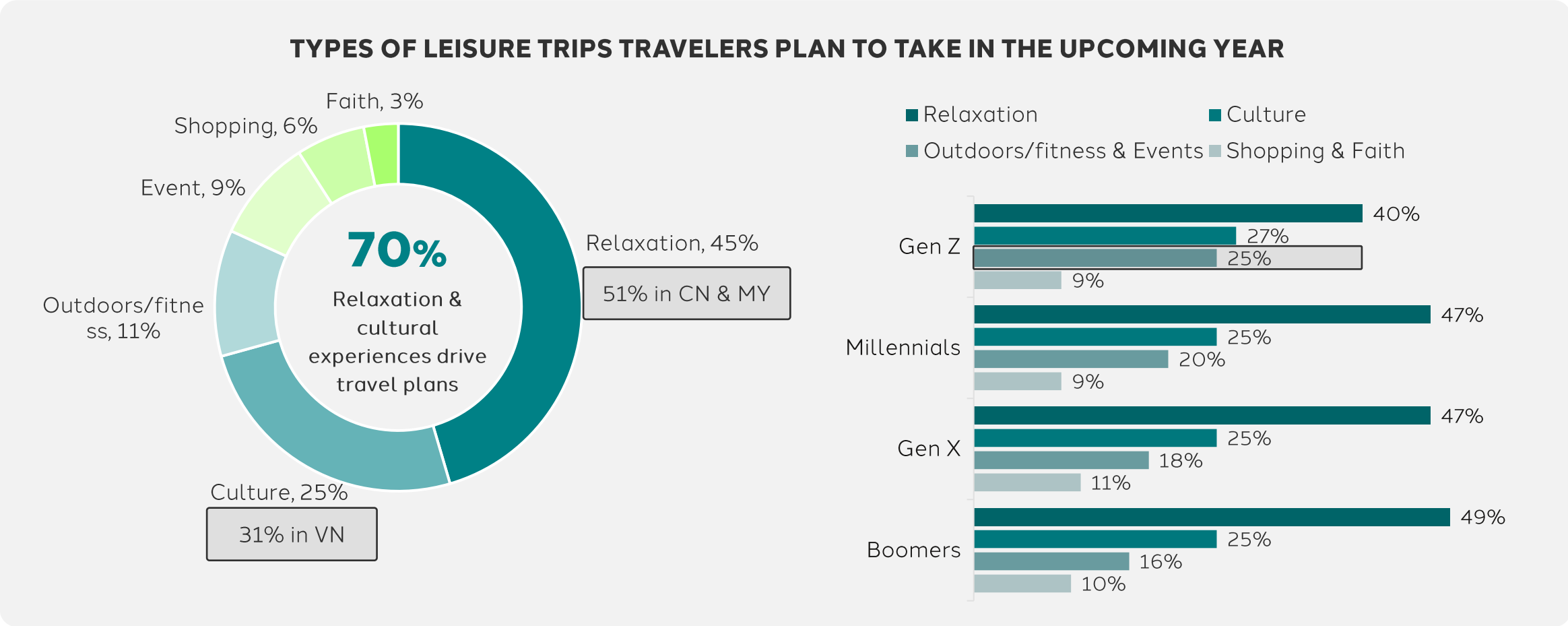
■ #1 ■ #2 ■ #3

	AU	CN	IN	MY	VN	Gen Z	Millennials	Gen X	Boomers
Within my own country	54%	79%	60%	57%	66%	61%	64%	66%	60%
Neighbouring country	22%	30%	32%	46%	29%	31%	37%	27%	23%
Europe	30%	21%	36%	27%	28%	27%	33%	26%	22%
Northeast Asia	16%	12%	25%	26%	23%	20%	23%	20%	12%
China	9%		14%	34%	31%	19%	21%	19%	12%



# APAC TRAVELERS SEEK RESTFUL ESCAPES AND CULTURAL DISCOVERY

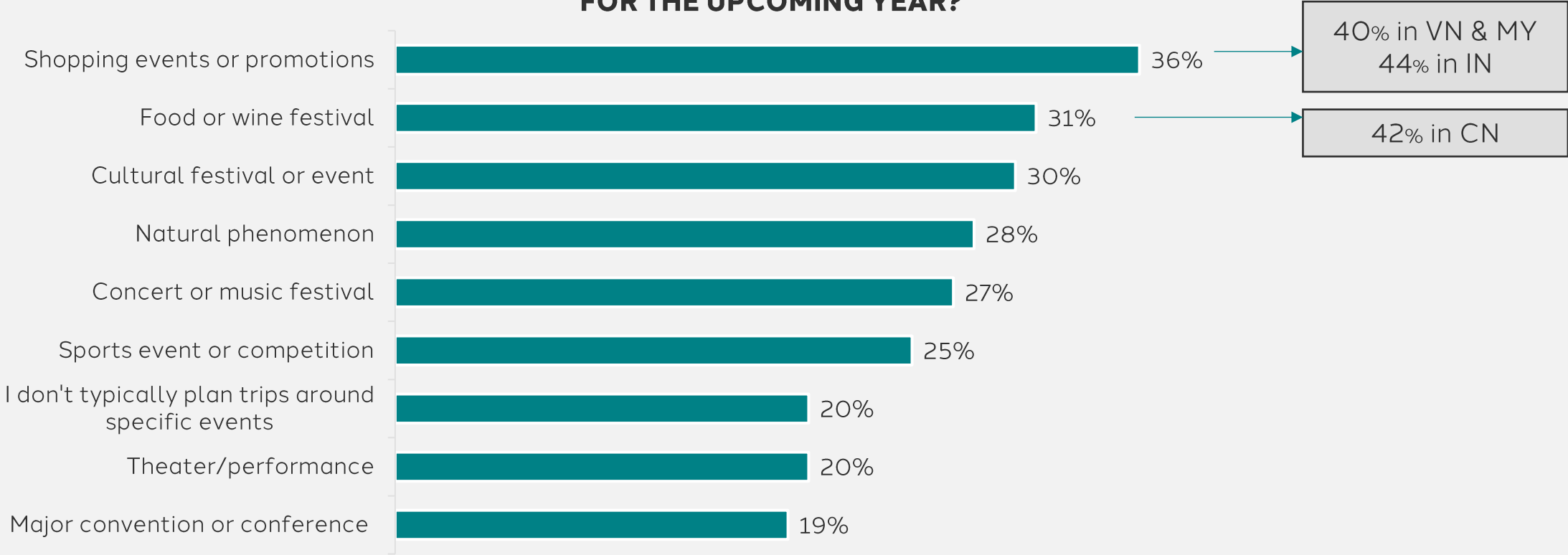
Relaxation and cultural experiences are the dominant travel motivators across all generations; however, Gen Z stands out with a notably higher appetite for outdoors, fitness & events (25%), signaling a preference for active and experiential travel.



# EVENTS ACT AS EXPERIENCE ENHANCERS RATHER THAN TRIP MOTIVATORS

While events are not primary trip drivers, they play a critical role in shaping travel experiences, acting as enhancers, with strong pull from shopping, food/wine, and cultural festivals.

**WHAT TYPES OF EVENT-BASED TRAVEL DID YOU UNDERTAKE IN THE PAST YEAR OR PLAN FOR THE UPCOMING YEAR?**



# ENGAGEMENT WITH EXPERIENTIAL EVENTS IS HIGHEST AMONG YOUNGER GENERATIONS AND VARIES BY MARKETS

Millennials and Gen Z show higher engagement with shopping, food, and cultural festivals as travel motivators, while this interest steadily declines with age. Australia and China are outliers with high preferences for events related to concerts and natural phenomenon, respectively.

WHAT EVENT-BASED TRIPS DO TRAVELERS TAKE IN THE PAST YEAR OR PLAN FOR THE UPCOMING YEAR? (TOP FIVE)

■ #1 ■ #2 ■ #3

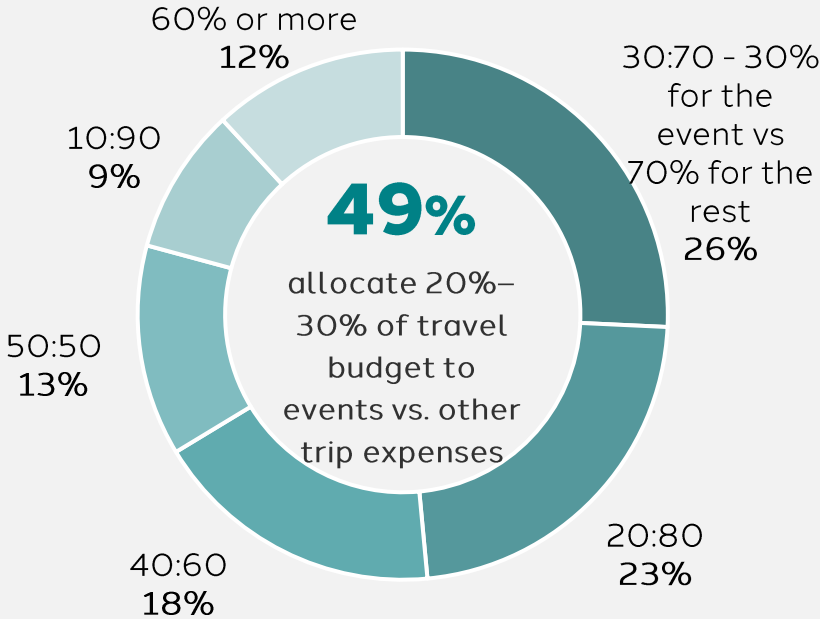
Event Type	AU	CN	IN	MY	VN	Gen Z	Millennials	Gen X	Boomers
Shopping events or promotions	22%	29%	44%	41%	41%	37%	40%	32%	18%
Food or wine festival	23%	41%	33%	24%	34%	31%	36%	28%	18%
Cultural festival or event	19%	26%	37%	29%	36%	31%	34%	25%	16%
Natural phenomenon	12%	42%	29%	26%	29%	28%	33%	24%	11%
Concert or music festival	25%	26%	33%	23%	25%	33%	29%	20%	14%



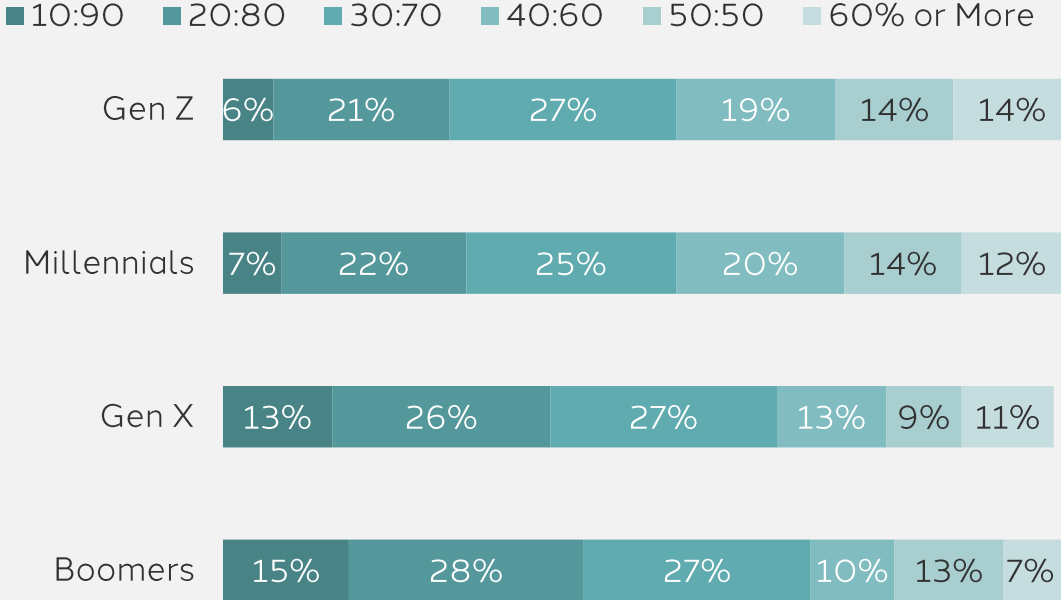
# EVENTS CAPTURE A MODERATE SHARE OF TRAVELERS' BUDGETS

Most travelers allocate around 20%–30% of their travel budget to events, reiterating that events typically complement broader travel experiences rather than drive trips independently.

## HOW TRAVELERS ALLOCATE THEIR TRIP BUDGET BETWEEN EVENTS VS. OTHER EXPENSES?



## TRIP BUDGET ALLOCATION BY GENERATION



Budget ratio of events vs other travel expenses

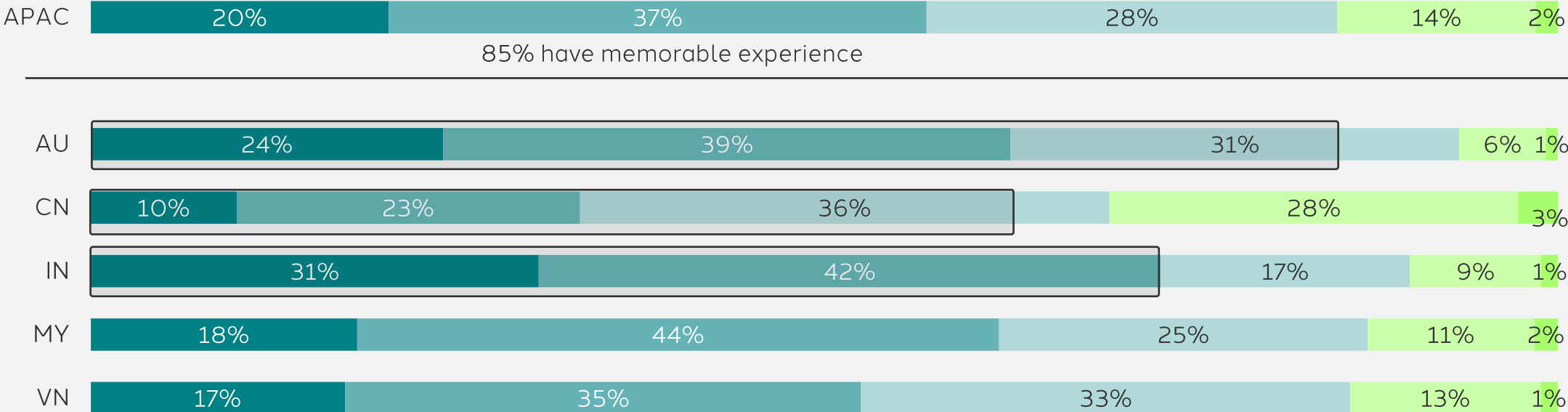


# MOST APAC TRAVELERS RECALL THEIR LEISURE TRIPS AS HIGHLY MEMORABLE, SIGNALING STRONG EXPERIENTIAL VALUE

Over 55% of APAC travelers describe their latest leisure trip as highly memorable, reinforcing travel’s strong emotional value. India and Australia lead in extremely memorable experiences, while China reflects moderate experience level.

## THINKING ABOUT YOUR MOST RECENT LEISURE TRIP, HOW MEMORABLE WAS THE EXPERIENCE OVERALL?

Extremely memorable   Very memorable   Moderately memorable   Slightly memorable   Not at all memorable



# IMPLICATIONS FOR MARKETERS

## **BUILD “DUAL-MODE” TRAVEL NARRATIVES (ROUTINE + ESCAPE).**

Travel is not positioned as pure escape anymore. It is an extension of everyday life with moments of elevation. This reframes how brands should construct storytelling. Move away from extreme escapism and instead design narratives that integrate familiarity, convenience, and emotional reset. Position offerings as “seamless upgrades to everyday life” rather than rare indulgences, especially in markets like India and Vietnam where travel is closely tied to routine.

## **DESIGN FOR SOCIAL PROXIMITY, NOT JUST DESTINATIONS.**

Travel decisions are being anchored in who travelers can connect with, not just where they go. With proximity to family/friends and child-friendly environments leading decision drivers, marketers need to pivot from destination-first to relationship-first targeting. Build products, bundles, and messaging around group travel, multigenerational needs, and social convenience, and this is a stronger conversion lever than aspirational destination imagery.

## **LEAD WITH AFFORDABILITY, DELIVER ON EXPERIENCE.**

Economic pressure is clearly reshaping behavior, shorter trips, deal-seeking, and delayed travel decisions, but aspiration remains intact. This creates a value aspiration duality where price may drive entry, but experience drives satisfaction and recall.

- Lead communication with affordability cues (offers, flexibility, value)
- Layer in premium cues (unique experiences, upgrades, exclusivity)



# WHAT CRITERIA INFLUENCES TRAVEL BRAND PREFERENCES



# APAC TRAVELERS PREFER MIDSCALE TRIPS, WITH SELECTIVE APPETITE FOR UPSCALE & LUXURY

Across APAC, midscale travel dominates planning, reflecting a pragmatic balance between value and comfort. India stands apart, with a much stronger luxury and upscale inclination, while China and Vietnam skew firmly midscale.

## HOW WOULD YOU CLASSIFY THE VACATION(S) YOU ARE PLANNING FROM A 'PRICE TAG' STANDPOINT?

*Darker shading indicates higher share selecting each price tier*

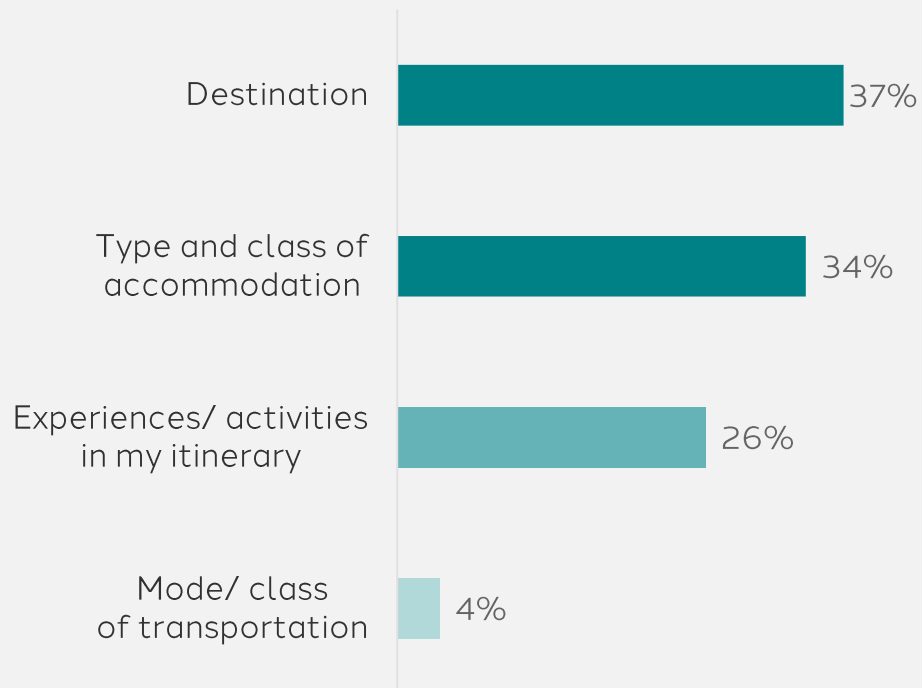
Price Tag	APAC	AU	CN	IN	MY	VN	Gen Z	Millennials	Gen X	Boomers
Luxury	22%	19%	10%	43%	17%	13%	22%	27%	17%	10%
Upscale	38%	33%	41%	43%	28%	39%	37%	43%	35%	24%
Midscale	48%	46%	58%	37%	52%	48%	48%	49%	47%	51%
Budget	35%	30%	33%	31%	43%	35%	34%	35%	35%	36%



# TRAVEL BUDGETS PRIORITIZE DESTINATION AND STAY— EXPERIENCES VARY SHARPLY BY MARKET

India is the most destination-driven market, with nearly 45% of travelers prioritizing where they go and the quality of their stay far more than itinerary activities. In contrast, Vietnamese travelers place the strongest emphasis on experiences and activities (37%), significantly above the APAC average.

## WHICH OF THE FOLLOWING ARE YOU PRIORITIZING WHEN MAKING SPENDING DECISIONS?



### MARKET SNAPSHOT

- India → High on Destination 45% (+8 pts vs APAC Avg.)
- Vietnam → High on Experiences 37% (+12 pts vs APAC Avg.)
- India → Low on Experiences 18% (-7 pts vs APAC Avg.)

### GENERATION SNAPSHOT

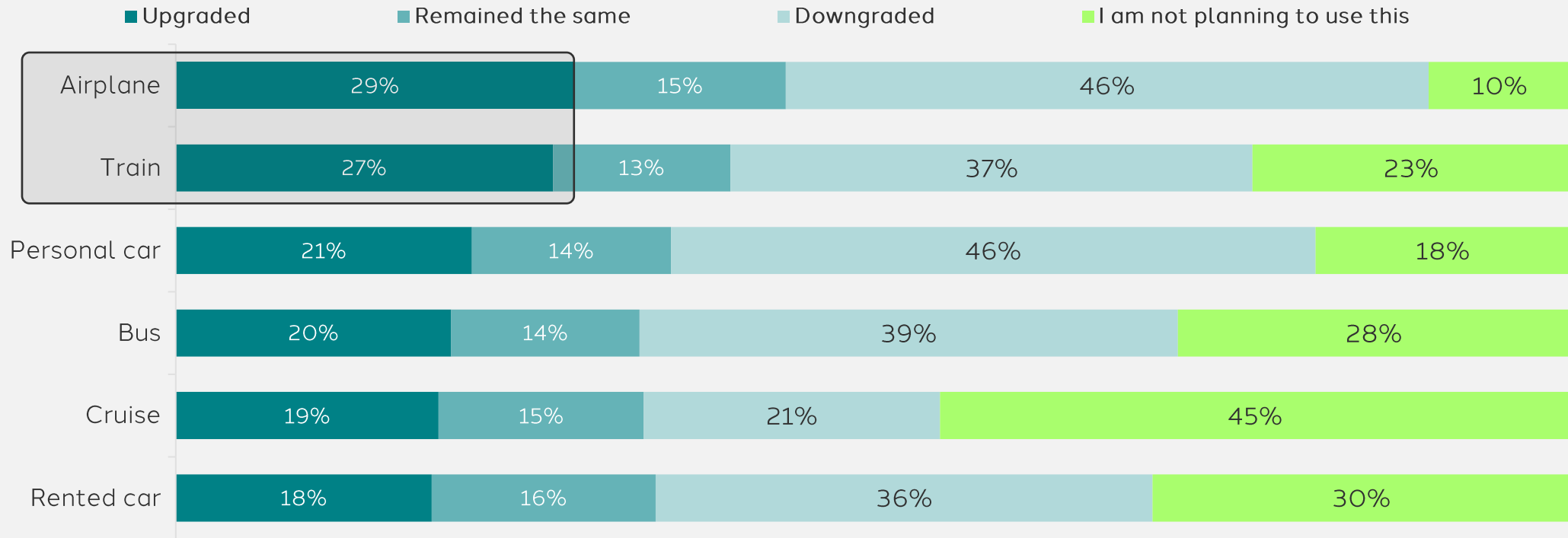
- All generations most destination-led



# TRAVELERS MOSTLY HOLD CLASS OF TRANSPORTATION STEADY; UPGRADES ARE CONSIDERED IN AIR AND TRAIN

APAC travelers are largely holding their transport class steady but selectively upgrading in air and train travel—while disengaging from lower-priority modes like cruises.

### HOW HAS THE CLASS OF TRANSPORTATION YOU BOOKED FOR THIS YEAR COMPARED TO THE CLASS OF TRANSPORTATION YOU USED IN PREVIOUS YEARS?



# UPGRADES ARE HIGHER IN INDIA FOR TRAIN & AIR TRANSPORT

India and younger travelers are the key drivers of transport-class upgrades across APAC, with Rail and Air emerging as the strongest upgrade categories. Generationally, Gen Z and Millennials show the highest upgrade intent across all modes.

## “I HAVE UPGRADED MY CLASS OF TRANSPORTATION (E.G., GOING FROM ECONOMY TO BUSINESS)”

■ #1 ■ #2 ■ #3

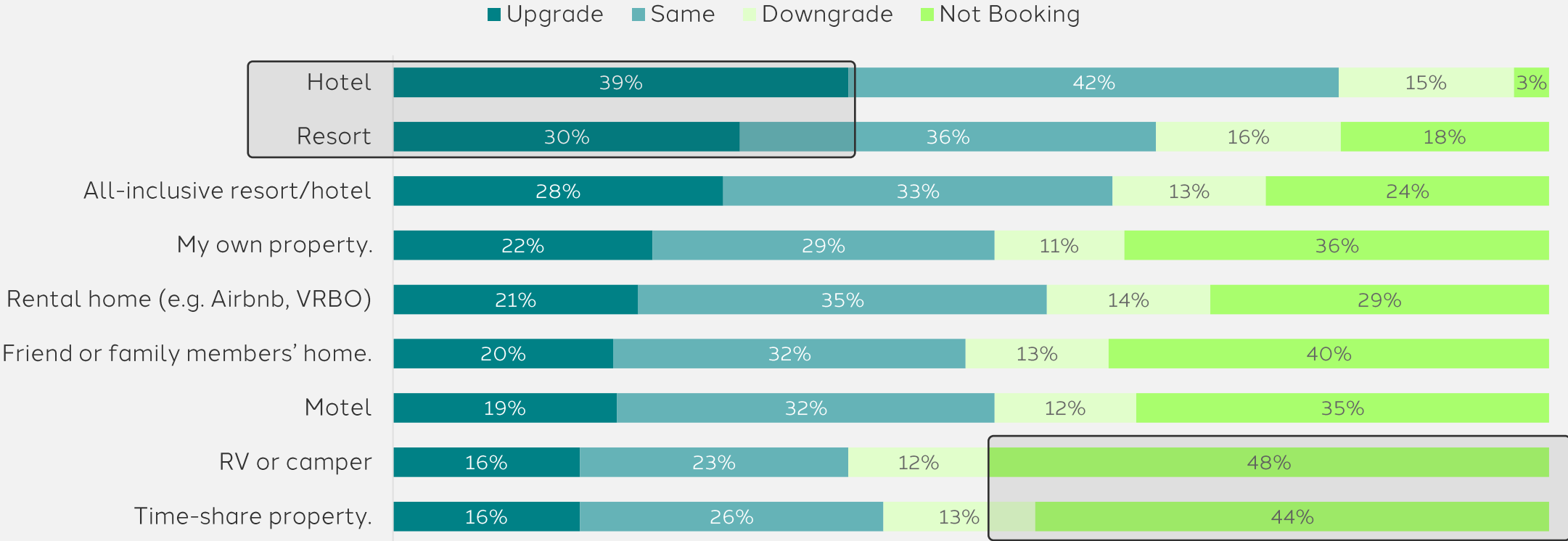
CLASS OF TRANSPORTATION	Country					Generation			
	AU	CN	IN	MY	VN	Gen Z	Millennials	Gen X	Boomers
Personal Car	13%	18%	37%	18%	17%	25%	23%	17%	12%
Airplane	24%	24%	47%	22%	22%	28%	33%	22%	24%
Train	16%	23%	49%	24%	18%	33%	28%	23%	18%
Bus	13%	12%	38%	18%	15%	23%	22%	15%	10%
Cruise	17%	11%	33%	19%	11%	20%	21%	15%	13%
Rented Car	14%	14%	30%	16%	16%	21%	21%	15%	9%



# HOTEL & RESORT UPGRADES LEAD APAC ACCOMMODATION CHOICES

APAC travelers are keeping accommodation levels mostly unchanged but selectively trading up on hotels and resorts. Meanwhile, accommodation formats like time-share property and RV/camper are largely not booked across markets.

## HOW HAS THE CLASS OF ACCOMODATION YOU BOOKED FOR THIS YEAR COMPARED TO PREVIOUS YEARS?



# INDIA & YOUNGER COHORTS LEAD THE SHIFT TOWARD PREMIUM ACCOMMODATION ACROSS APAC

India leads decisively, with upgrades primarily in hotels and resorts, surpassing other markets. Australia over-indexes on rental homes. Gen Z and Millennials look for premium experiences across multiple accommodation types.

## “I HAVE UPGRADED MY ACCOMMODATION (E.G., GOING FROM 3 STARS TO 4 STARS)”

■ #1 ■ #2 ■ #3

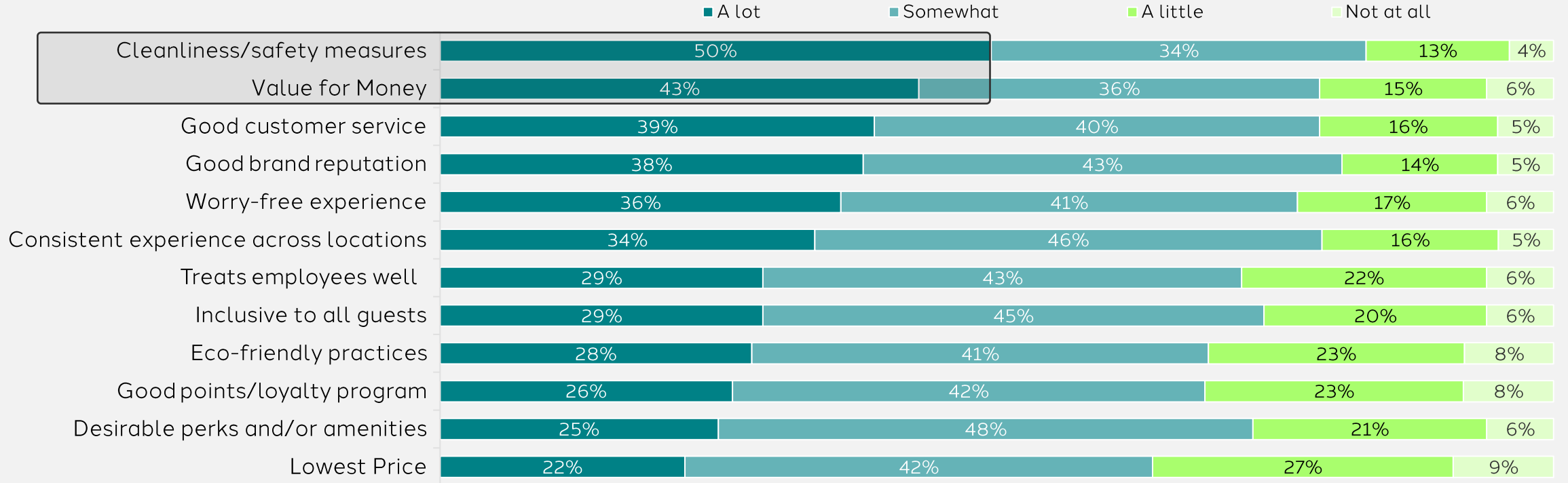
TYPE OF ACCOMMODATION	MARKETS					GENERATIONS			
	AU	CN	IN	MY	VN	Gen Z	Millennials	Gen X	Boomers
Hotel	28%	32%	56%	40%	33%	42%	43%	39%	28%
Resort	21%	22%	45%	30%	28%	32%	34%	23%	18%
Motel	16%	10%	29%	18%	22%	23%	21%	14%	13%
All-inclusive resort/hotel	20%	20%	41%	32%	28%	30%	32%	23%	21%
Time-share property	10%	12%	29%	14%	12%	18%	19%	11%	6%
Rental home (e.g. Airbnb, VRBO)	17%	18%	35%	23%	13%	26%	24%	17%	10%
Friend or family members' home.	13%	12%	38%	20%	15%	26%	23%	15%	10%
My own property	14%	12%	38%	28%	15%	29%	24%	16%	9%
RV or camper	9%	13%	27%	15%	14%	21%	18%	11%	6%



# HYGIENE & SAFETY AND VALUE FOR MONEY DRIVE TRAVEL BRAND SELECTION

Travelers choose brands that feel safe, reliable, and good value—values-led features matter more in APAC markets and particularly among younger cohorts.

**WHEN YOU ARE CHOOSING A HOTEL, AIRLINE OR OTHER TRAVEL BRAND, HOW MUCH DO THE FOLLOWING INFLUENCE YOUR PURCHASING DECISIONS?**



# CUSTOMER EXPERIENCE AND LOYALTY OUTWEIGH PRICE IN PURCHASE CONSIDERATIONS

Across APAC, travelers are most likely to purchase from brands that deliver a remarkable experience (37%), closely followed by brands offering loyalty points. India and particularly younger cohorts lean more towards loyalty programs, while Australia is the most price-driven market.

## WHEN TRAVELING, WHICH TRAVEL BRAND ARE YOU MORE LIKELY TO PURCHASE FROM?

■ #1 ■ #2 ■ #3

TRAVEL BRAND PREFERENCE	APAC	AU	CN	IN	MY	VN	Gen Z	Millennials	Gen X	Boomers
WITH REMARKABLE CUSTOMER EXPERIENCE	37%	35%	44%	34%	32%	38%	32%	36%	39%	47%
EARN LOYALTY POINTS WITH	33%	23%	37%	41%	28%	35%	38%	37%	25%	20%
WITH NET LOWEST PRICE	29%	41%	18%	24%	38%	26%	29%	26%	34%	32%



# IMPLICATIONS FOR MARKETERS

## POSITIONING PREMIUM AS “SMART UPGRADE,” NOT INDULGENCE.

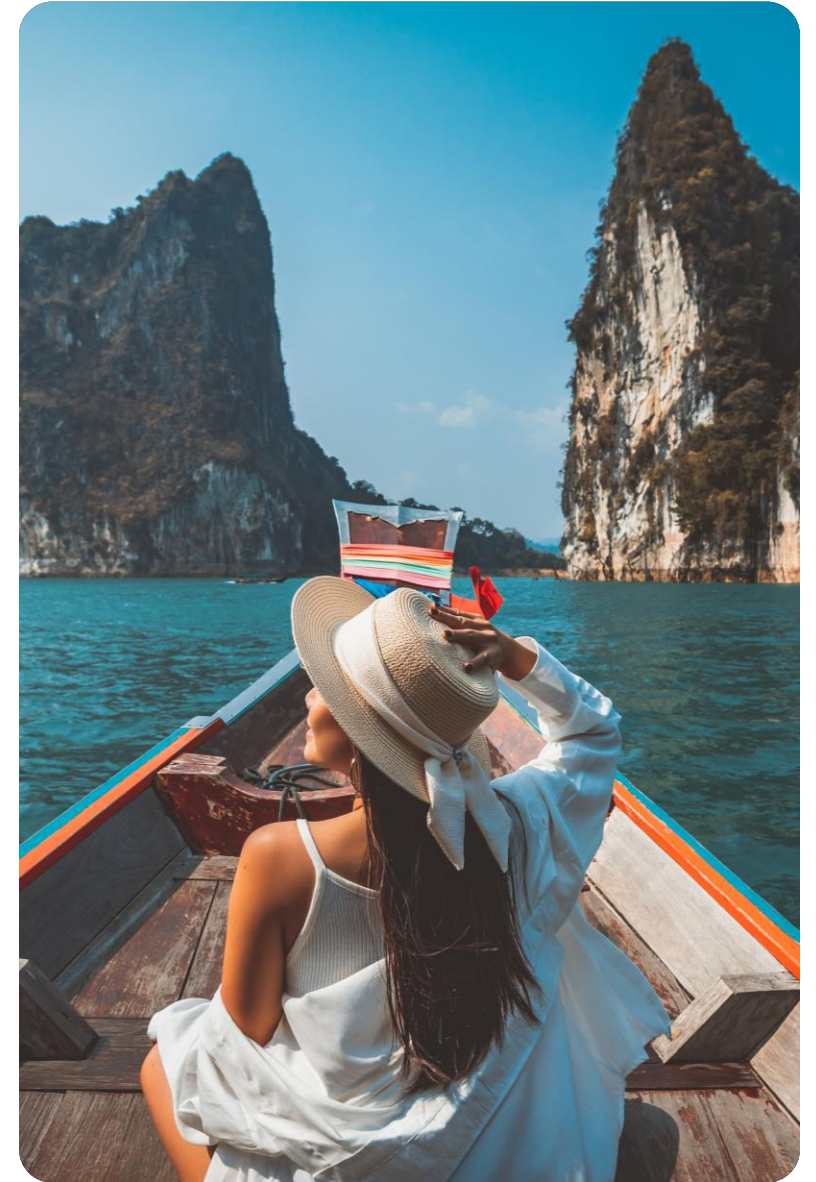
While midscale price dominates, there is clear selective appetite for upscale (38%) and luxury (22%), particularly in markets like India. Premium should not be framed as extra, but as a justified upgrade enhanced comfort, convenience, or unique experiences that feel worth the incremental spend. This reframes premium from aspiration to practical elevation.

## WIN PREFERENCE THROUGH EXPERIENCE AND LOYALTY, NOT LOWEST PRICE.

When choosing between travel brands, consumers are more likely to prefer those offering a remarkable customer experience or meaningful loyalty benefits over those offering the lowest net price. This indicates a shift from transactional savings to long-term value and relationship building. Brands should invest in experience consistency and loyalty ecosystems, using them as core levers for preference and repeat choice, rather than competing primarily on discounts.

## EARN TRUST BEFORE YOU SELL ASPIRATION.

The survey shows that cleanliness, safety, value for money, customer service, and brand reputation are the strongest drivers of travel brand choice across APAC, outweighing perks or price alone. These factors now act as non-negotiable decision filters rather than hygiene add-ons. Brands must therefore lead with reassurance and reliability, clearly signaling worry-free experiences and consistent delivery, before layering emotional storytelling or aspirational messaging.



# ABOUT DENTSU

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