

KANTAR | ConsumerLink

Allianz

Travel Research - APAC

MARCH 2025

Allianz  **Travel**

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Methodology Summary

Methodology



Online survey, using Kantar ConsumerLink panel in New Zealand and Kantar Profiles Panel for all other markets



Sampling is nationally representative, and then is post-weighted by age, gender and region to ensure it matches the underlying population as published by Statistics department of each country

18⁺

Only those aged 18+ are included

Latest Wave



Fieldwork dates: 31st Jan to 17th Feb 2025



Sample size: AU n=1000, NZ n=500, CN n=1001, HK n=500, IN n=1000, JP n=1000, SG n=502,



Maximum margin of error for n=500 (at 95% confidence level): $\pm 4\%$

Maximum margin of error for n=1000 (at 95% confidence level): $\pm 3\%$

Past comparisons will be done where possible as the questionnaire has changed



Summary of findings

Besides Japan, other markets have high propensity to travel internationally.

Among Australian and New Zealand – besides travelling between each other – Asia and Europe are popular destinations. Other Asian markets also tend to travel within the region but also to Australian, New Zealand, UK and Europe.

To rest and relax, enjoy cultural experiences, having an adventure, and visit friends and family are the reasons to travel across markets.

Those not planning to travel cited cost as a factor, deeming it too expensive or not having sufficient funds to do so.

On average these travellers plan to stay between 1.5 – 2 weeks. Japan has the shortest average of only 9 days.

The majority of travellers prefer to travel with others, especially with their partner/spouse or family members.

Travelling spend obviously varies by market but Australia and New Zealanders are the biggest spenders followed by the Chinese.

There are some concerns with travelling with Oceania markets worry about their flight getting cancelled or delayed. While Asian markets have different sets of worries, with personal safety, extreme weather events and being scammed, robbed or pickpocketed being more of a concern. Falling sick and not having enough money is also other concerns.



Summary of findings cont.

There isn't a common denominator on international flight behaviours across markets but Australians, Kiwis and Indians are more likely to give up their seats to allow their family members to sit together. Other markets and behaviours seem to be rather equal.

Entertainment is crucial to pack, along with preparations for lost or delayed luggage.

Keeping important documents safe and purchasing travel insurance are the top advice for first time travellers. Hong Kongers also advise first time travellers to take care of their health.

Oceania markets need between 3 – 6 months to plan and book their trip while majority of Asian markets only need up to 3 months for both.

Word-of-mouth is the most trusted travel inspiration, but there is more reliance on social media in Asian markets particularly among Chinese and Hong Kongers. YouTube, Instagram, Facebook and TikTok (in certain markets) are the most popular platforms, while in China it is Douyin.

Navigation tools are essential for travellers, with digital wallets also being a favourite.

Most travellers will consider to purchase travel insurance with most choosing to purchase it directly from the insurance provider or from travel websites. Reasons for purchase are obvious with security/piece of mind being the top followed by coverage of unforeseen events.



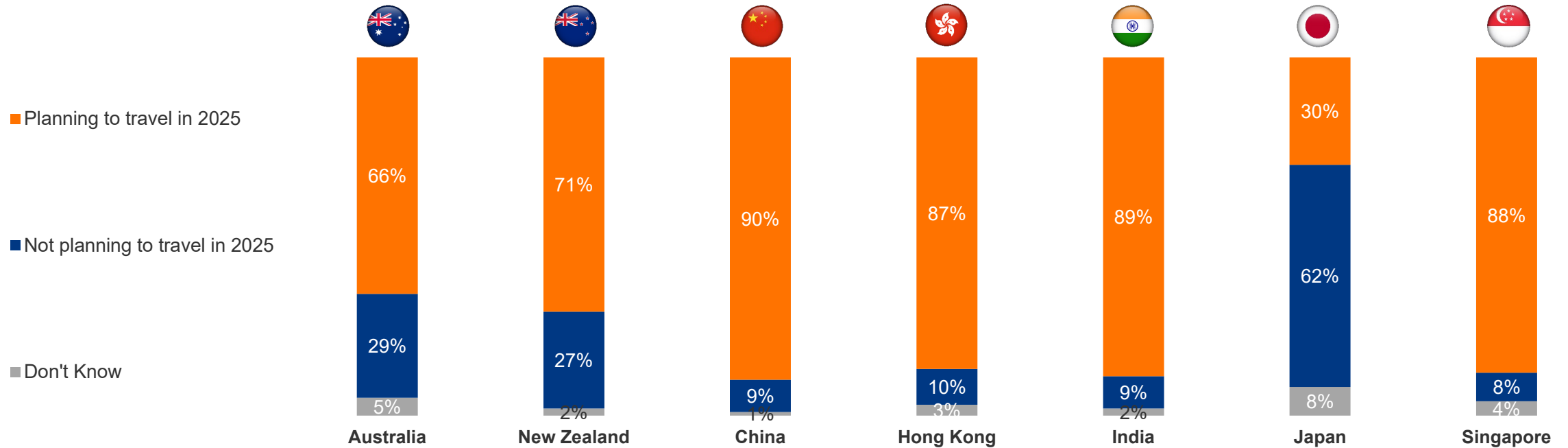
1

Travel Context



Asia markets has a higher propensity to travel in 2025 with more than 80% planning to do so. However, Japan is the lowest with, only 30% planning to travel this year. Oceania markets also have high interest.

Planning to Travel in 2025 (%) – Total Respondents



Besides travelling between each other, Australians and Kiwis are interested in travelling to Asia the most, followed by Europe. Kiwis are also more keen on the Pacific Islands.

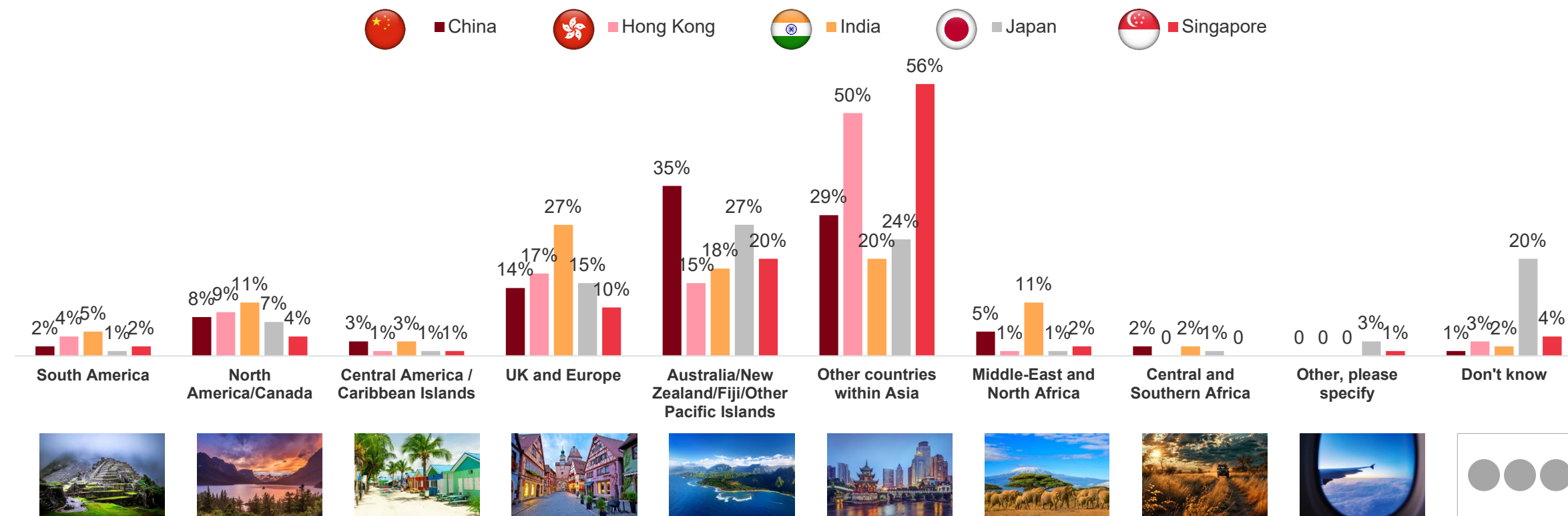
(Note- We have created a separate slide for Australia and New Zealand as their destination list is different to other markets)

Destination Intended For Next International Holiday (%) – Australia & New Zealand (Those Planning to Travel in 2025)



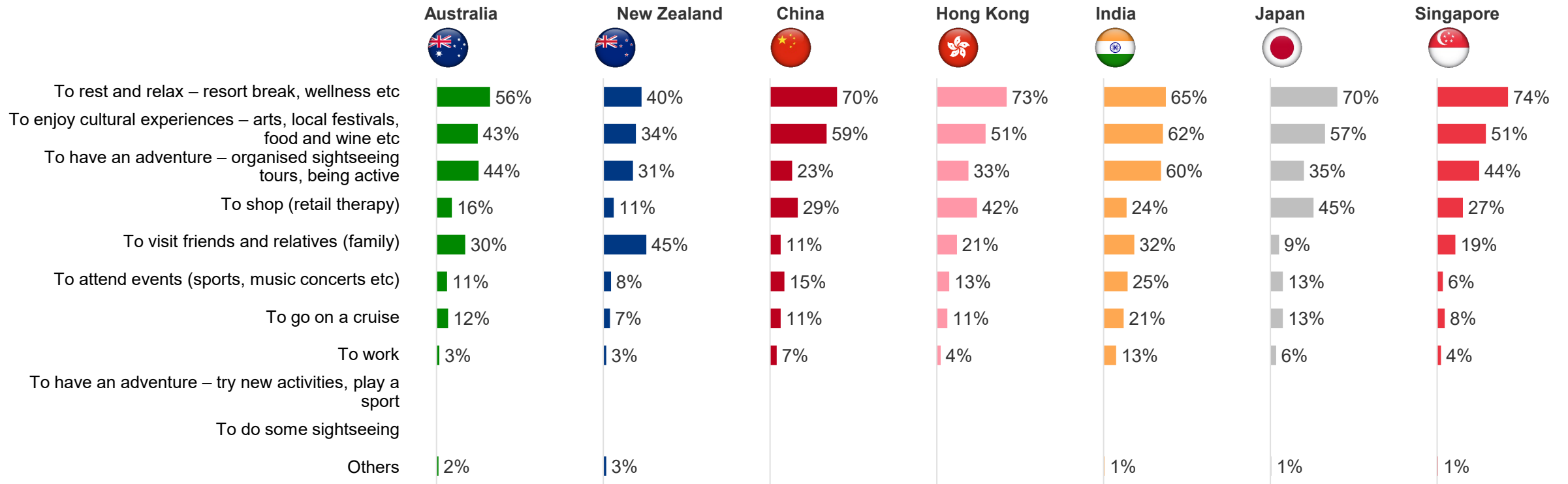
Other Asian destinations are popular among these Asian markets followed by Oceania markets (likely Australia and New Zealand specifically) and UK/Europe. Japanese are a bit indecisive.

Destination Intended For Next International Holiday (%) – Other Asian Markets (Those Planning to Travel in 2025)



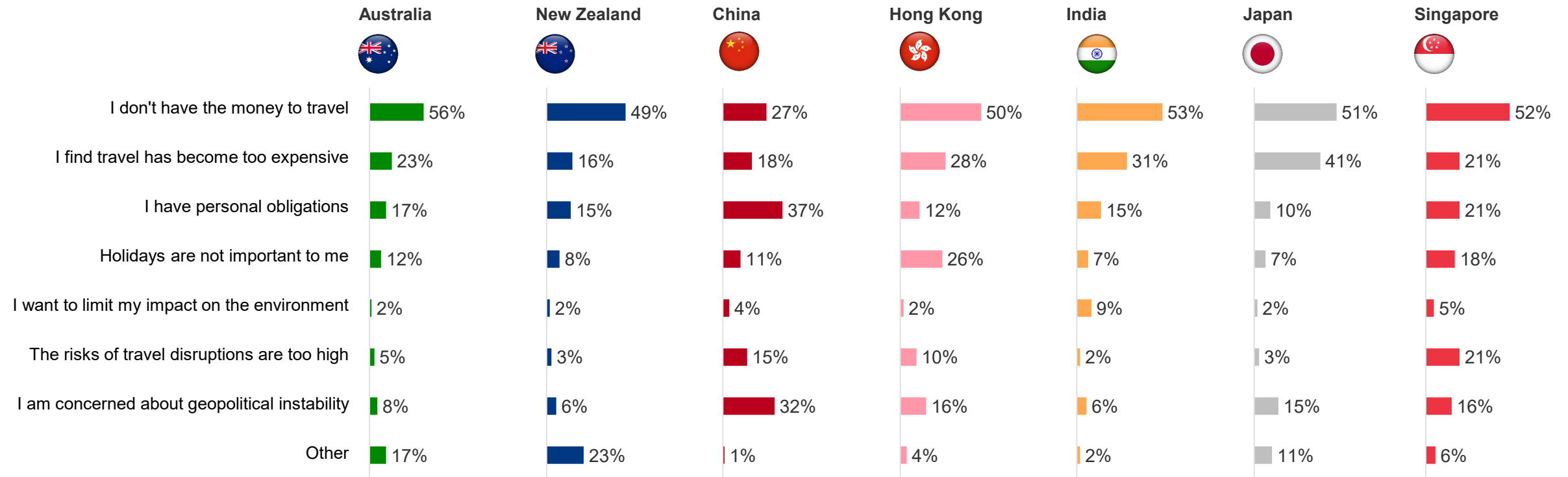
To rest and relax, enjoy cultural experiences, having an adventure and visit friends and family are the reasons to travel across markets.

Main Reason To Travel (%) – Those Planning To Travel in 2025



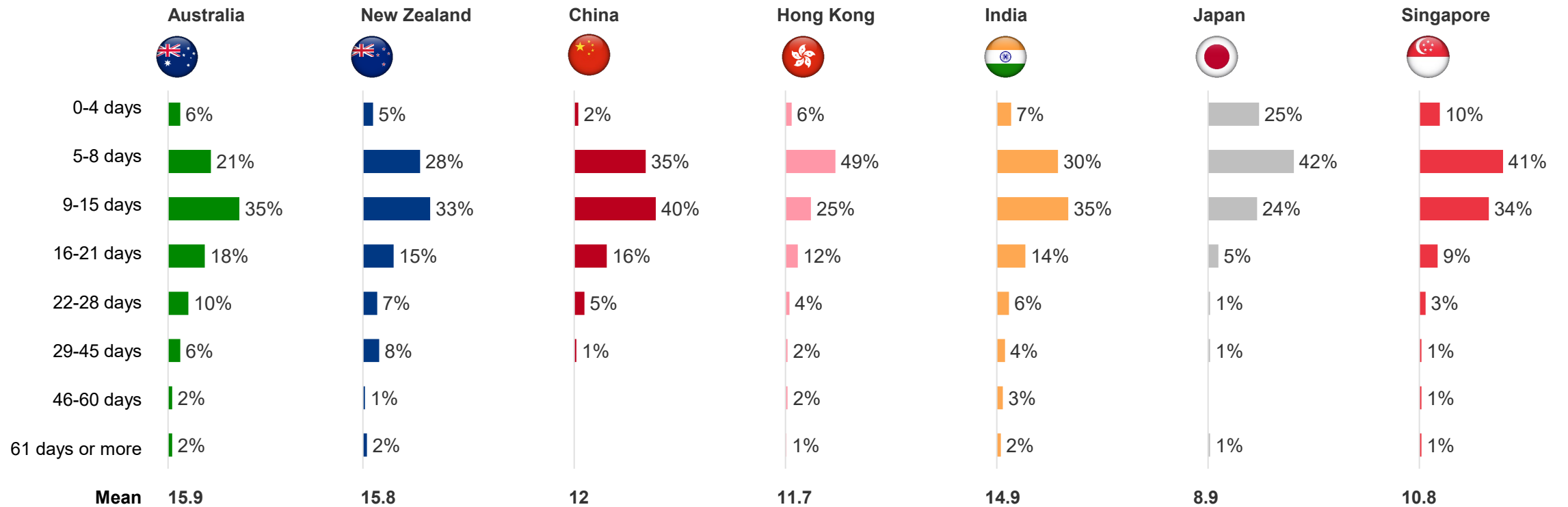
Cost is the major factor for not travelling for all markets as they do not have the money or find it expensive. However, Chinese have more personal obligations and concerns about geopolitical instability. Some Hong Kongers find holidays are not that important to them.

Primary Reason For Not Travelling (%) – Those Planning To Travel in 2025



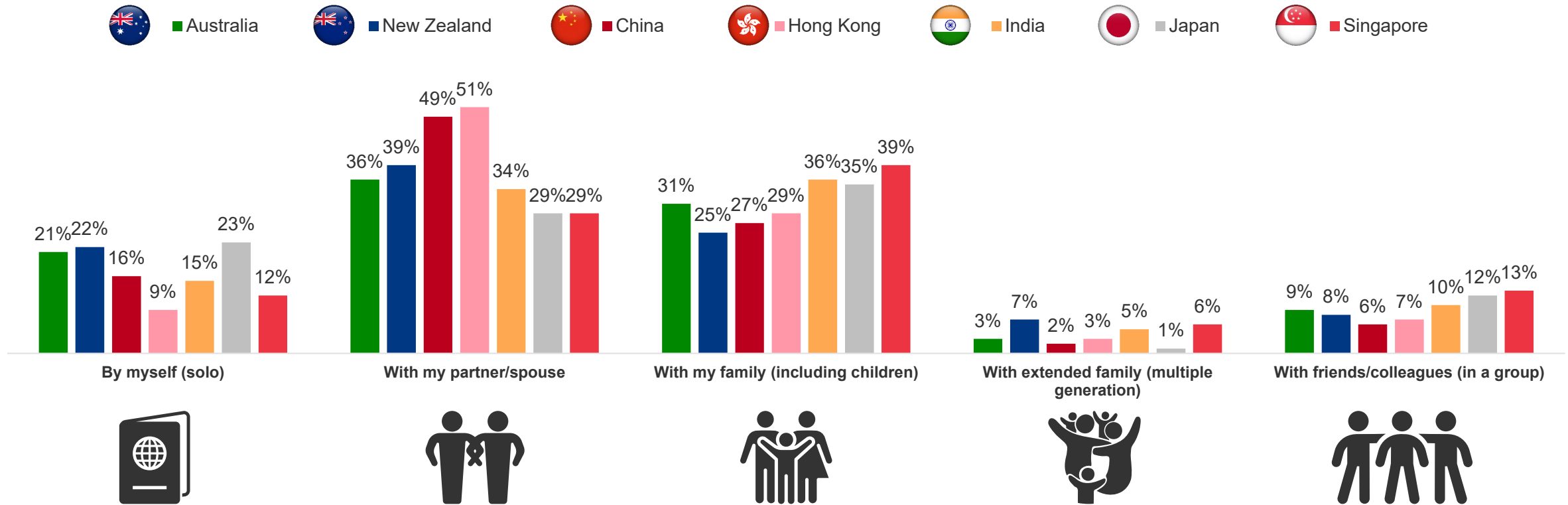
Average travelling period would be between, 1.5 – 2 weeks. Japanese plan to stay the shortest at only around 9 days.

How Long Is Your Trip? (%) – Those Planning To Travel in 2025



The majority would be travelling with others, especially with their partner/spouse or family members.

Who Is Travelling With You? (%) – Those Planning To Travel in 2025



2

Travel Spend



Australians and Kiwis tend to spend more followed by the Chinese. The rest of the markets only plan to spend less than USD2,000.

Budget For Your Next Trip (USD) – Those Planning To Travel in 2025

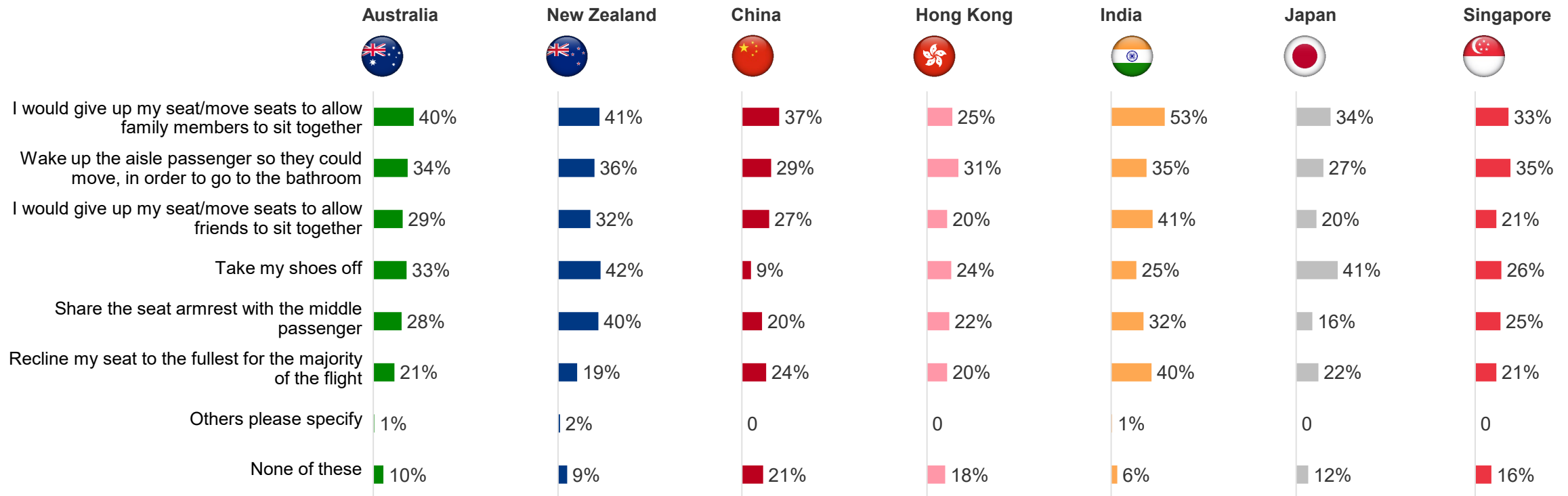


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Travel Behaviours & Concerns

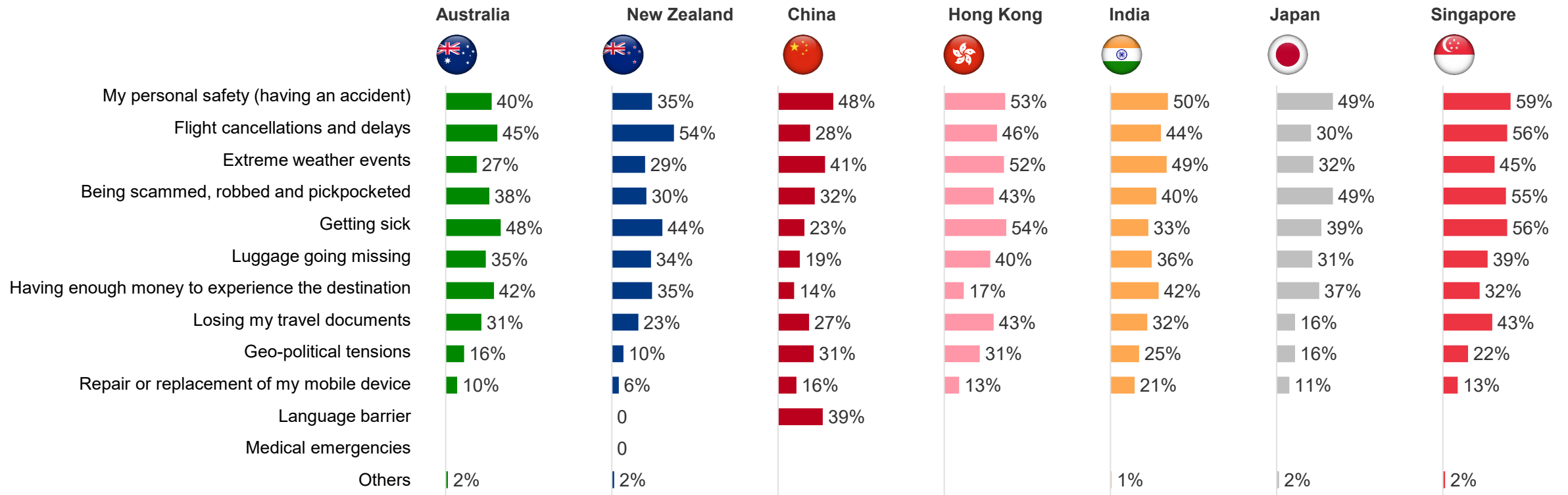
Australians, Kiwis and Indians are more likely to give up their seats to allow their family members to sit together but other behaviours are relatively equal.

International Flight Behaviour (%) – Those Planning To Travel in 2025



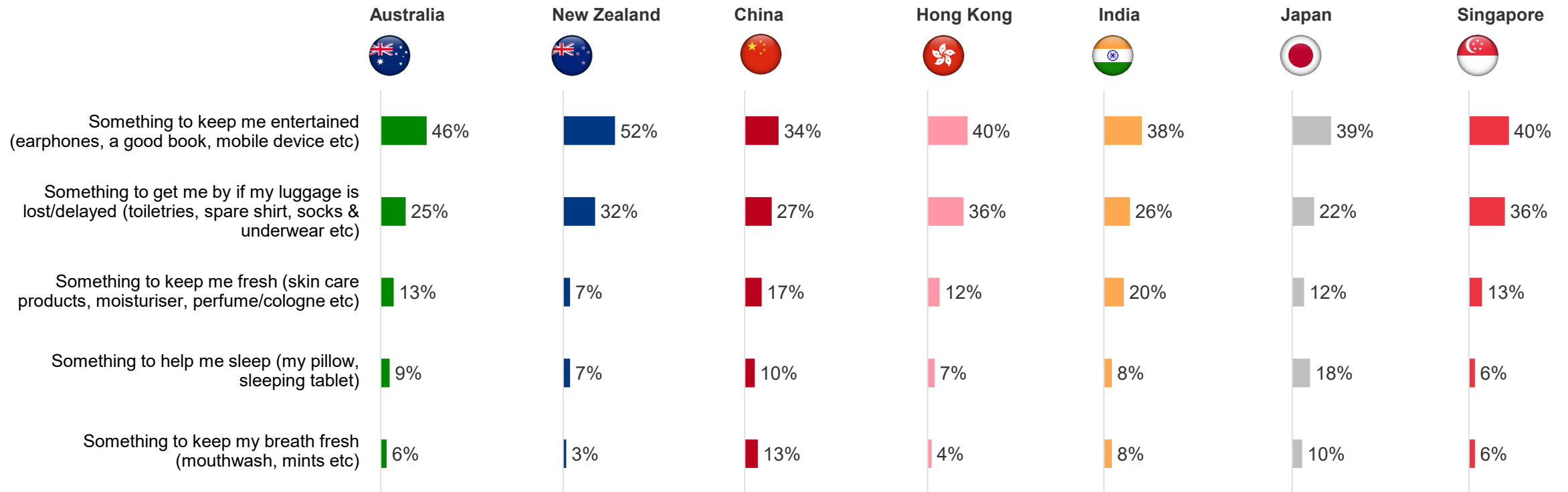
Ocenia markets are more concern about flight cancellations or delays while Asian markets are more worried about their personal safety, extreme weather events and being scammed, robbed or pickpocketed. Falling sick and not having enough money is also other concerns.

Travel Concerns (%) – Those Planning To Travel in 2025



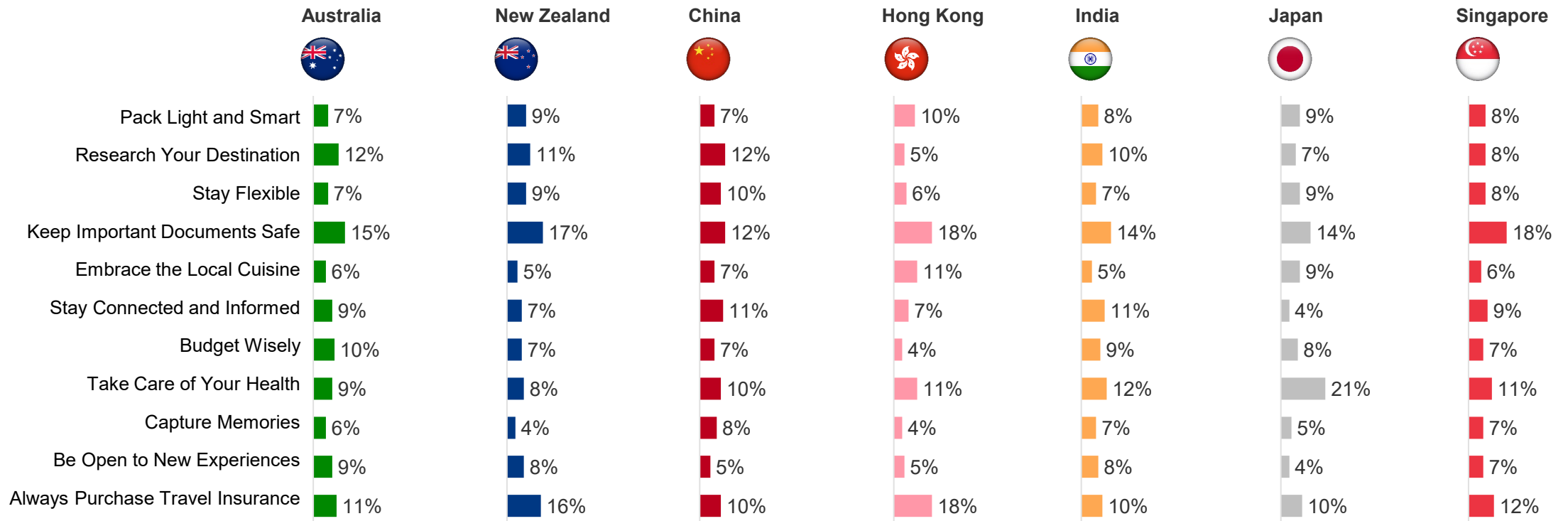
Entertainment is the most important when travelling for all markets followed by being prepared if luggage is lost or delayed.

What's Important To Pack In Hand Luggage/When Travelling? Something To...(%) – Those Planning To Travel in 2025



Keeping important documents safe and purchasing travel insurance are the top advice for first time travellers. Hong Kongers also advice first time travellers to take care of their health.

Advice to First Time Travellers (%) – First Importance (Those Planning To Travel in 2025)

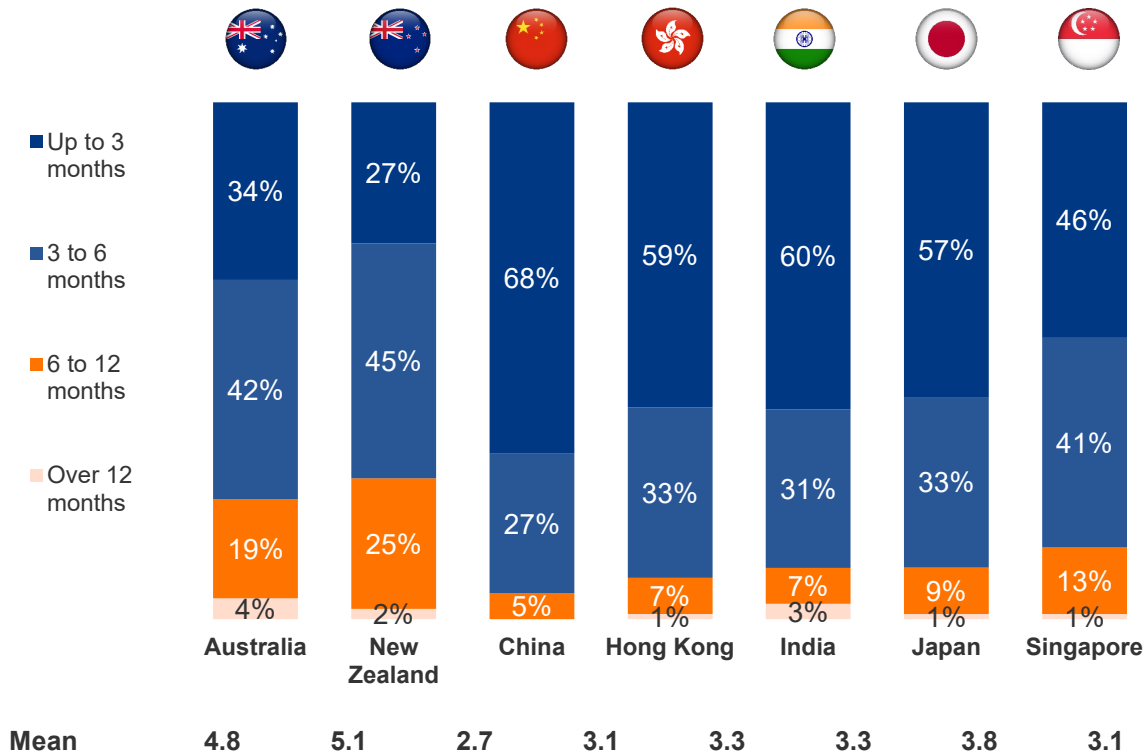


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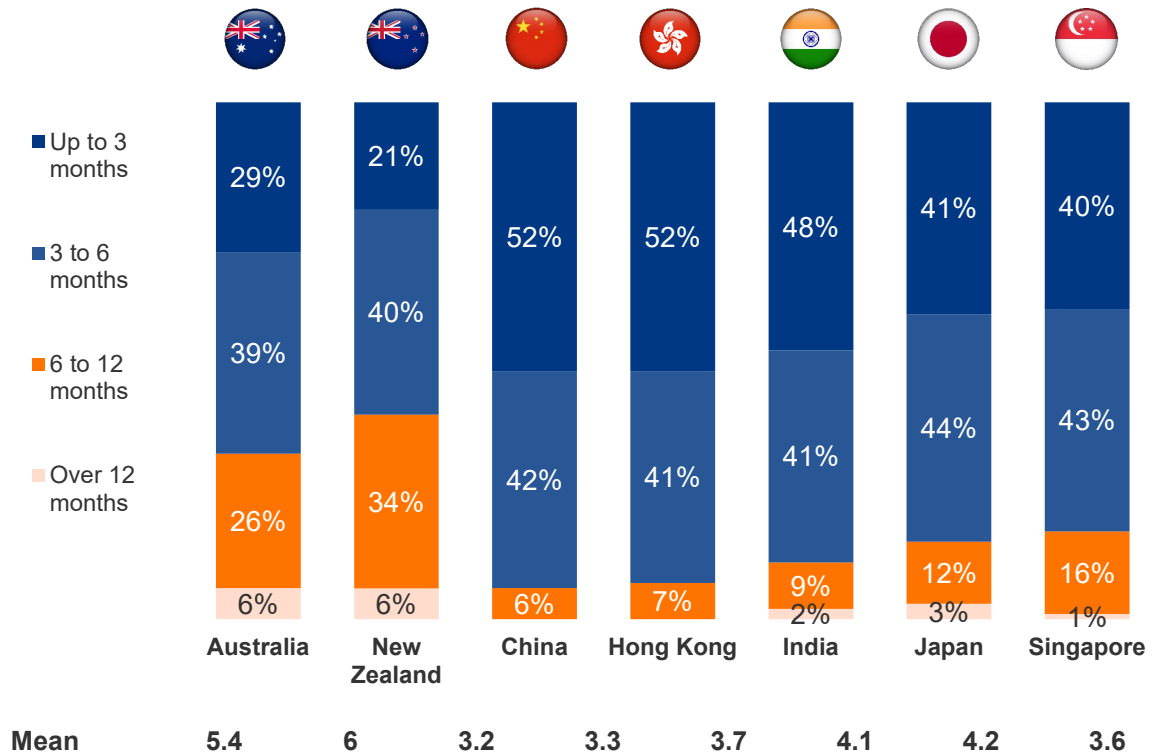
Trip Organisers

Oceania markets need between 3 – 6 months to plan and book their trip while majority of Asian markets only need up to 3 months for both.

How Far In Advance Do You Plan Your Trip? (%)
– Those Planning To Travel in 2025

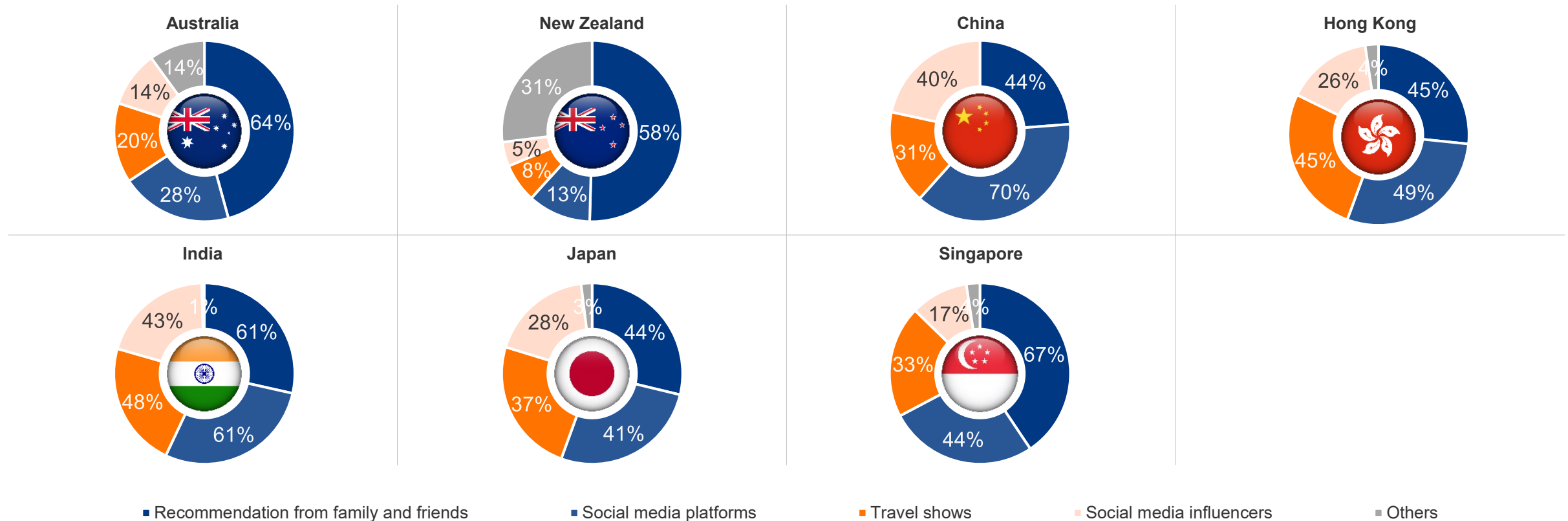


How Far In Advance Do You Book Your Trip? (%)
– Those Planning To Travel in 2025



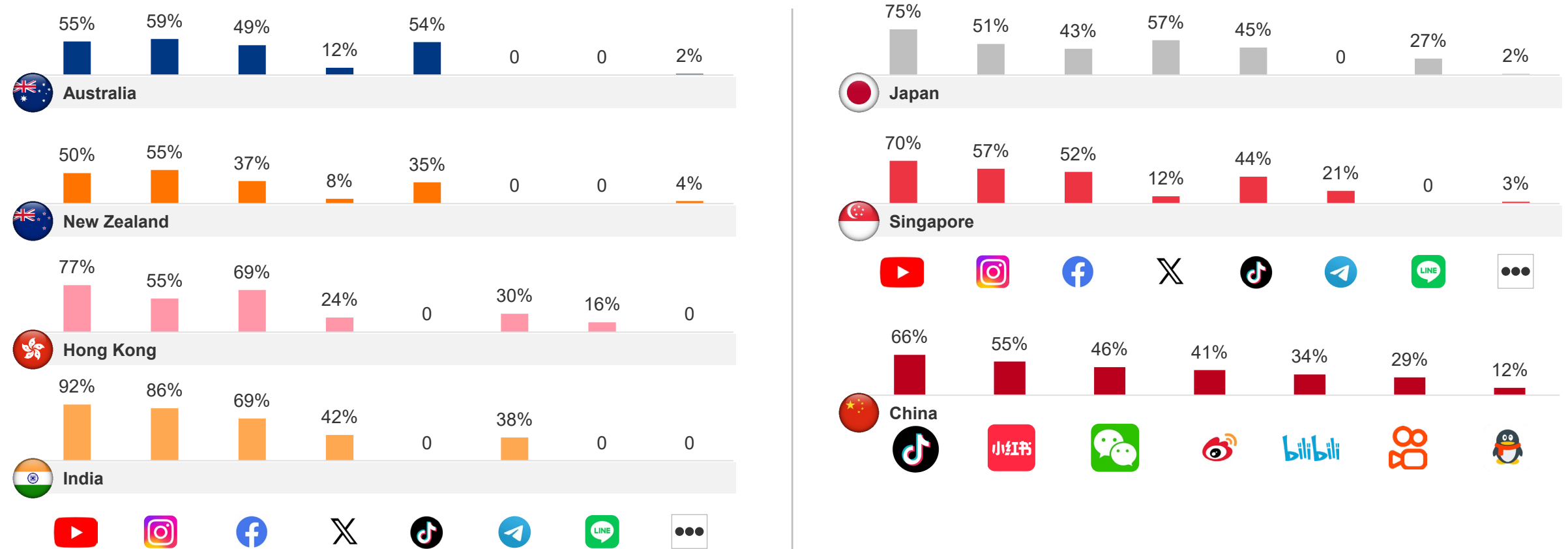
The majority of travellers rely on word-of-mouth from their family and friends, but there is more reliance on social media among Chinese and Hong Kongers.

Travel Inspiration (%) – Those Planning To Travel in 2025



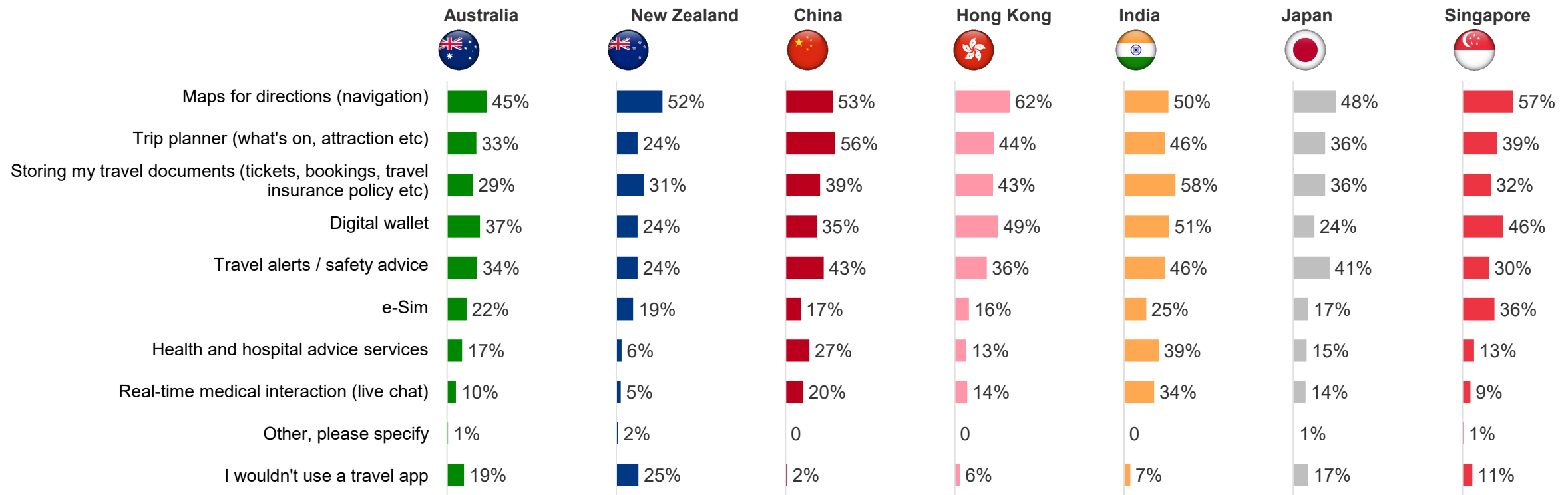
The usual suspects, YouTube, Instagram and Facebook are the most popular social media platforms. Certain markets also favour TikTok, while China obviously have different platforms.

Trusted Social Media Platforms for Travel Recommendations (%) – Potential Travellers Who Selected Social Media Platforms



Navigation is the feature most travellers plan to use. Other features vary by market, but we do see digital wallet also being a favourite.

Travel App Features (%) – Those Planning To Travel in 2025



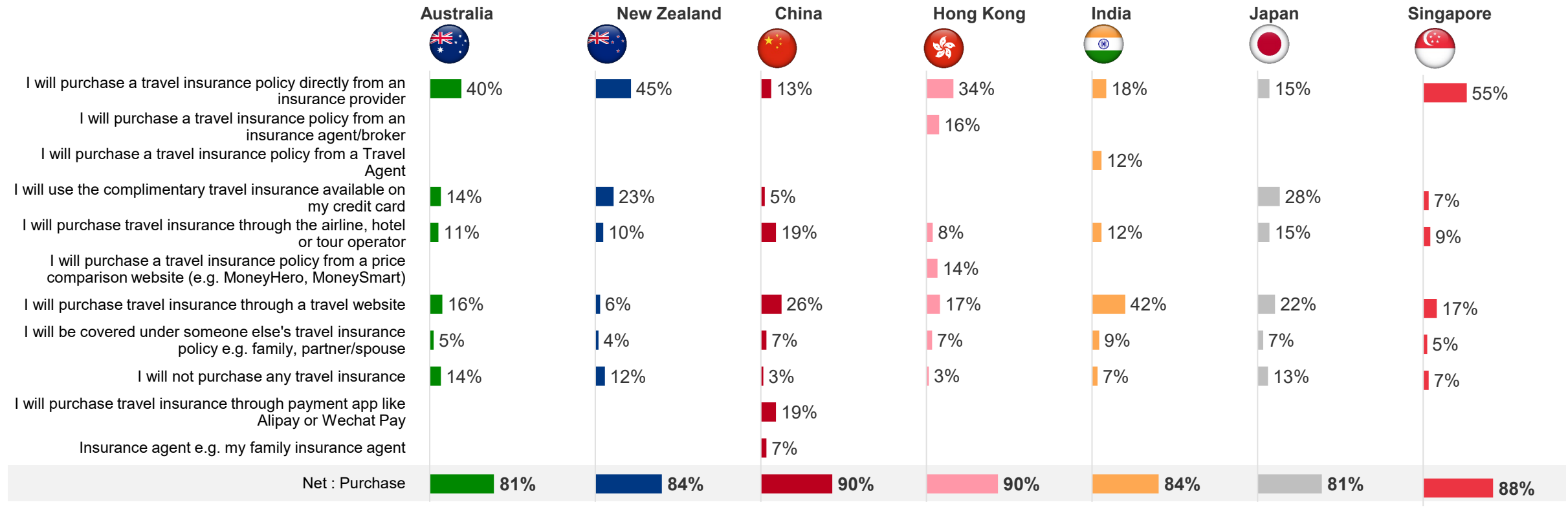
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Travel Insurance



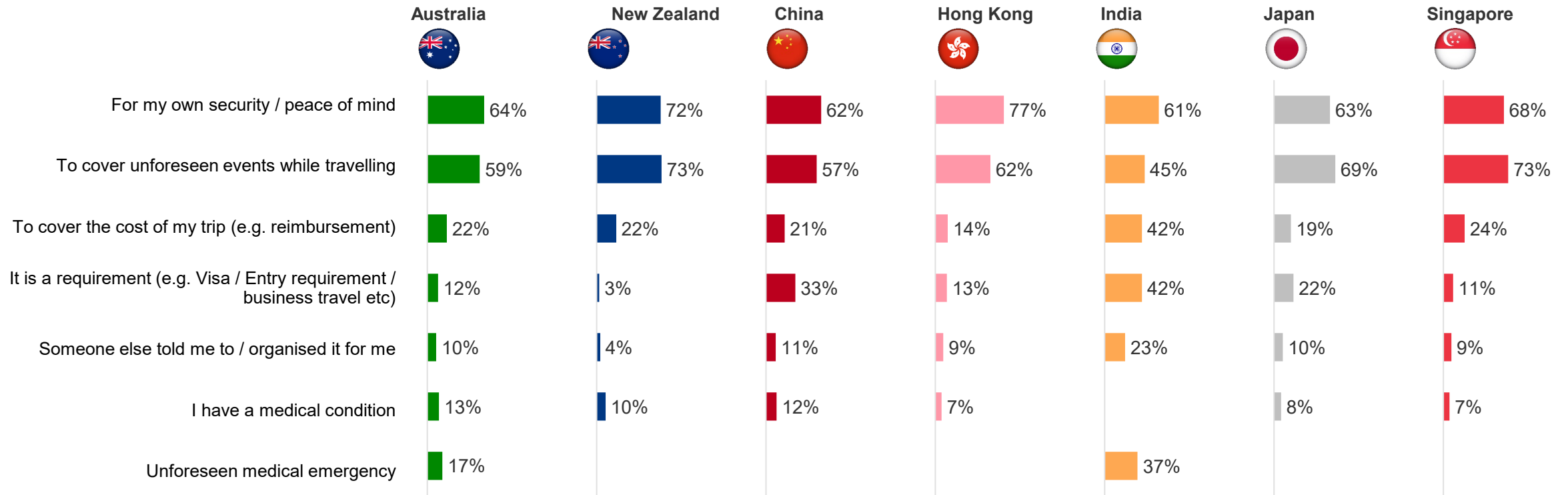
An overwhelming majority do intend to purchase travel insurance. The majority plan to purchase it directly from an insurance provider followed by travel websites.

Likelihood To Purchase Travel Insurance (%) – Those Planning To Travel in 2025



Majority are purchasing it for security or piece of mind and also to cover unforeseen events while travelling.

Primary Reason For Purchasing Travel Insurance (%) – Those Planning To Travel in 2025



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Thank you

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