



Experiencing Luxury- The Asian Traveller in 2016

A Strategic Report by AFFLUENTIAL™



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& STRATEGY

In Partnership with ILTM Asia
May 30th – June 2nd 2016

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Shanghai the Bund... tengr4555. Some Rights Reserved.

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Introduction

Agility Research & Strategy, a global luxury research and consulting firm with a strong focus on the Travel & Hospitality sector has partnered with ILTM Asia, Reed Travel Exhibitions, to create this in-depth report launched exclusively at the 2016 ILTM Asia event.

This exclusive report is based on key insights from Agility's Affluent Insights™ 2016 Luxury Travel Report, which provides a comprehensive look at the evolving Asian travel consumer with over 5,000 travel consumers surveyed across 8 key regional markets. This comprehensive report will be made available for ILTM delegates at a special rate. We trust you will find this report insightful!



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Travel Frequency

TOP 3 Categories Planning to Purchase in Next 12 Months

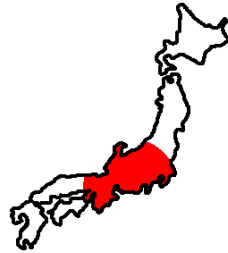
Travel is at top for future spending plans, and the focus is on travel experiences and activities. Fine dining experiences are also ranked quite high, except in Japan. Indian consumers show high interest to spend on jewellery and premium/luxury watches, and are also likely to go on a cruise.

Regional TOP 3:

1. Travel Experiences
2. Hotel Accommodation
3. Airline Tickets



1. Travel Experiences
2. Hotel Accommodation
3. Airline tickets



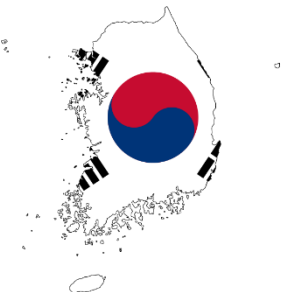
1. Travel Experiences
2. Hotel Accommodation
2. Airline tickets (tie)



1. Travel Experiences
2. Airline tickets
3. Hotel Accommodations



1. Hotel Accommodations
2. Travel Experiences
3. Airline tickets



1. Airline Tickets
2. Travel Experiences
3. Hotel Accommodations and Makeup (tie)



1. Hotel accommodations
2. Airline tickets
3. Travel Experiences



1. Jewellery
2. Travel Experiences
3. Hotel Accommodations and Fine Dining Experiences (tie)

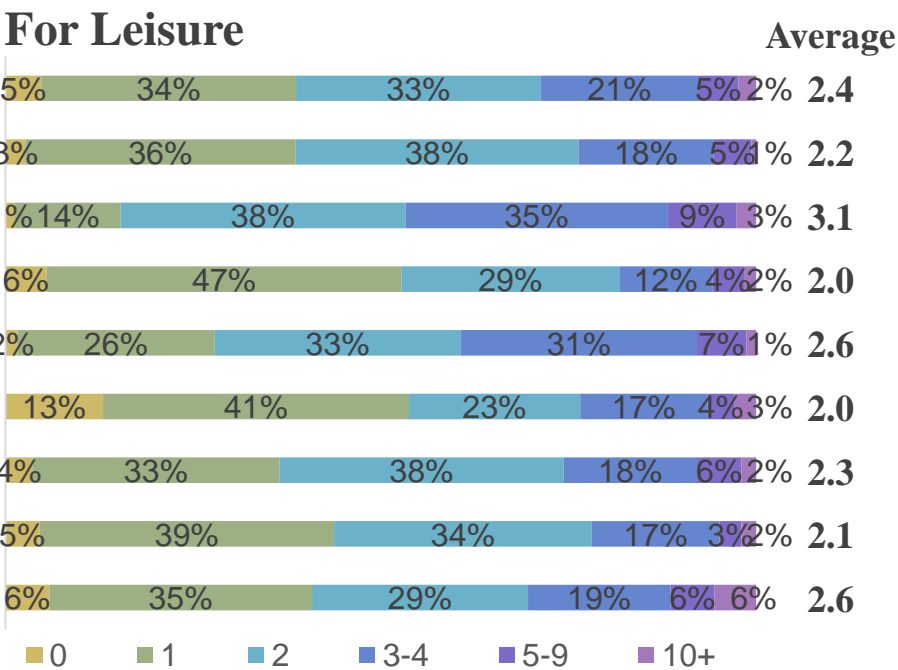


1. Travel Experiences
2. Hotel Accommodations
3. Airline tickets

Q: Which of the following have you purchased in the last 12 months or are planning on purchasing in the next 12 months?
(Next 12) Base: 2016; n = 2441

Number of Trips in the Past 12 Months

Singaporeans have on average done the highest number of leisure trips in the past 12 months, more than 3. Taiwanese and Japanese travellers do the smallest number of leisure trips, more than one trip less than Singaporeans annually.

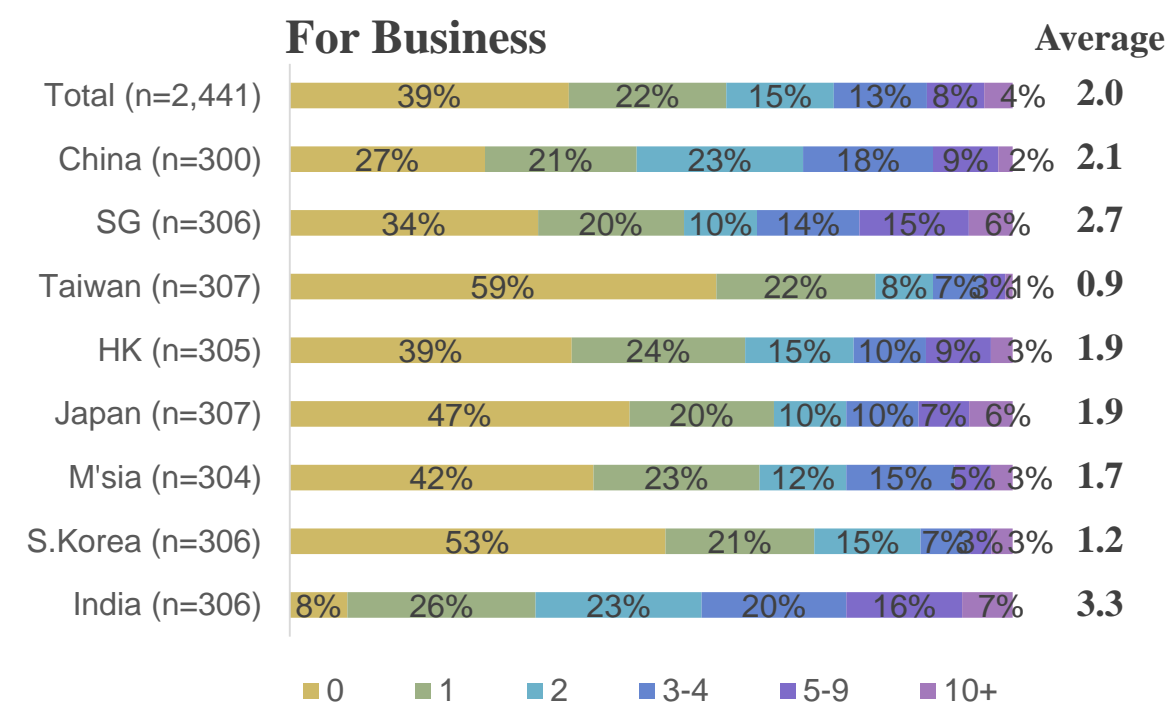


Q:How many international trips have you taken in the past 12 months for the following purposes?
For Leisure/For Business/For Both Leisure and Business; Base: 2016; n = 2441

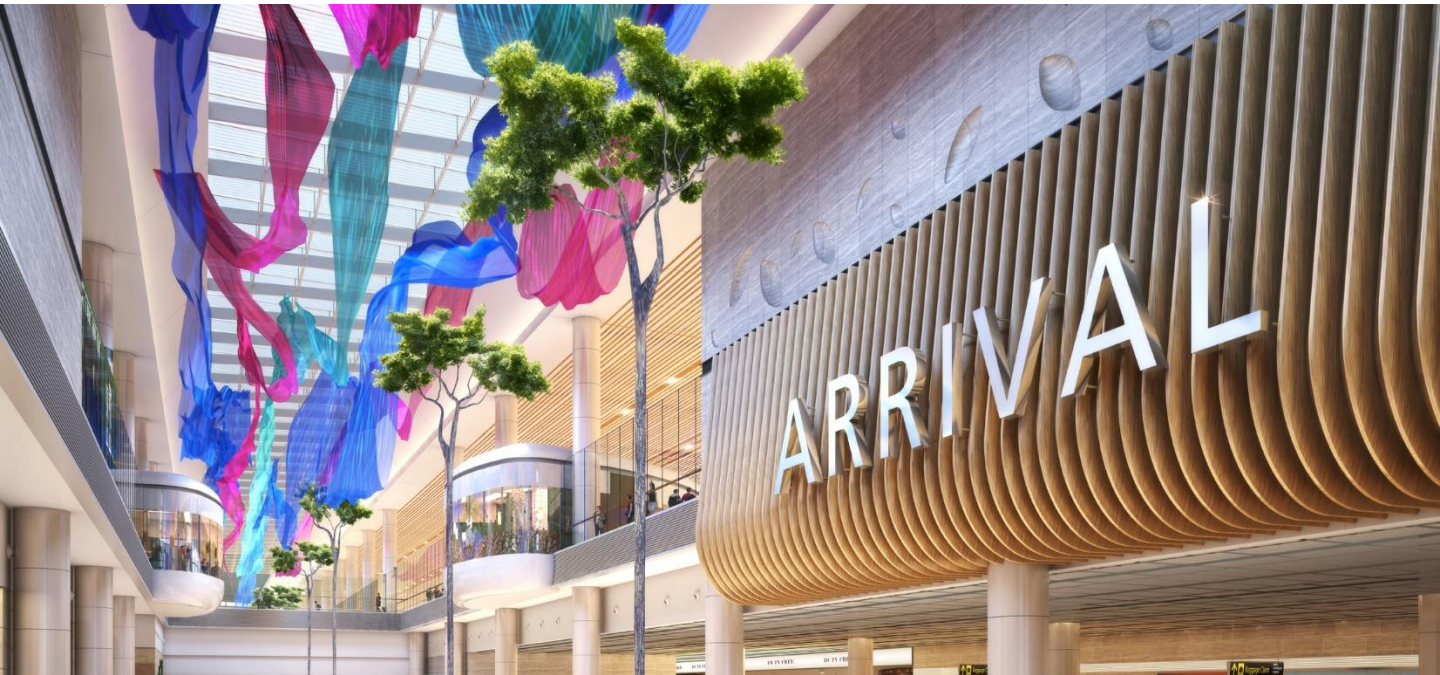


Number of Trips in the Past 12 Months

The majority of Taiwanese and South Korean travellers have not gone on any international business trips in the past 12 months, while more than 9 in 10 Indian travellers have gone on at least one trip. Indians followed by Singaporeans are overall the most frequent international business travellers. Indian travellers are also clearly the most likely to combine business and leisure for an international trip.



Q:How many international trips have you taken in the past 12 months for the following purposes?
For Leisure/For Business/For Both Leisure and Business; Base: 2016; n = 2441



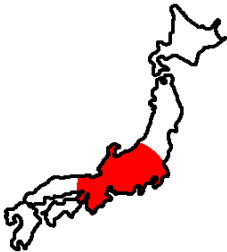
Plans on Travelling Abroad More

Out of the ten statements asked across the eight markets in the region, by far respondents were the most optimistic with the statement, “**I am more likely to travel abroad for vacation**”, with 3 in 4 on average agreeing with it. Compared to one year ago, when we asked the same question, there has overall been an increase agreement with this statement. Even though there is a slight dip in the number of those agreeing with this in China, Singapore, and HK, they are still the clear majority.

Regional Total
2015: 72% → 2016: 76%



2015: 83%
2016: 81%↓



2015: 49%
2016: 60%↑



2015: 74%
2016: 71%↓



2015: 78%
2016: 78%↔



2015: 71%
2016: 79%↑



2015: 82%
2016: 78%↓



2015: 82%
2016: 89%↑



2015: 60%
2016: 75%↑

Q. Looking ahead to the next 12 months, and comparing it to the previous 12 months, please rate how strongly you agree with each of the following statements. (Completely agree + Somewhat agree): “I am more likely to travel abroad for vacation”; Base: 2015, n=2,932; 2016, n=2,441



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Consumer Travel Destinations

TOP 3 Holiday Destinations Abroad, Past and Next 12 months

In the past year, the leading holiday destination for travellers in the region was Hong Kong, and was followed by Tokyo and Singapore. Bangkok was a popular choice especially for travellers from Singapore and Malaysia, while travellers from India were likely to head to Dubai, London or New York. Hawaii was the top destination for Japanese travellers.

Top 3 Regional Total

Past 12M: **1. HK 2. Tokyo 3. Singapore**
Next 12M: **1. Tokyo 2. Osaka 3. HK**

China

Past 12M: **1. HK 2. Tokyo 3. Seoul**
Next 12M: **1. Maldives 2. Paris 3. Tokyo**

Hong Kong

Past 12M: **1. Tokyo 2. Taipei 3. Osaka**
Next 12M: **1. Osaka 2. Tokyo 3. Taipei**



In the coming 12 months, even more travellers from the region are looking go to Japan. Paris is high on the list for the Chinese and Indian travellers, while South Koreans along with the Japanese are planning head for Hawaii.

Japan

Past 12M: **1. Hawaii 2. HK 3. Singapore**

Next 12M: **1. Hawaii 2. NYC 3. Singapore**

South Korea

Past 12M: **1. Tokyo 2. HK 3. Osaka**

Next 12M: **1. HK 2. Singapore 3. Tokyo**

Taiwan

Past 12M: **1. Tokyo 2. HK 3. Osaka**

Next 12M: **1. Osaka 2. Tokyo 3. HK**

Singapore

Past 12M:

- 1. Hong Kong**
- 2. Bangkok**
- 3. Kuala Lumpur**

Next 12M:

- 1. Tokyo**
- 2. Hong Kong**
- 3. Bangkok**

Malaysia

Past 12M:

- 1. Singapore**
- 2. Bangkok**
- 3. Hong Kong**

Next 12M:

- 1. Tokyo**
- 2. Seoul**
- 3. Singapore and Sydney (tie)**

India

Past 12M:

- 1. Singapore**
- 2. Dubai**
- 3. London and NYC (tie)**

Next 12M:

- 1. Los Angeles**
- 2. London**
- 3. Paris**



Q; Which of the following HOLIDAY DESTINATIONS have you travelled to in the last twelve months or are planning on visiting in the next twelve months? Base: 2016 n= 2,134; 2015 n= 2441



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Travel Behaviour and Preferences

Travel Preferences in Asia (top-2-box)

The majority of travellers in all markets are very much interested in exploring new destinations they have not visited before. New experiences and activities are also a major influencer in destination choice, and activities are often booked ahead of the travel.

I am most interested in going to destinations I have not visited before:

76%

I choose destinations where I can do new activities and have new experiences:

73%

I book activities for my trip ahead of time:

69%

It is important that my travel does not negatively affect the environment

63%

I always stay in 4 or 5 star hotels:

55%

I prefer to rent a condo or a house rather than stay in a hotel:

34%



Taiwan. Taipei. Street food. Tomas Fano. Some Rights Reserved

I make restaurant reservations for my trip ahead of time:

45%

I travel abroad to watch sporting events or races:

33%

Q: Please rate how strongly you agree with each of the following statements about you travel preferences.(Completely agree + Somewhat agree) ; Base: 2016; n = 2441

TOP 3 Popular Travel Experiences /Activities

In terms of activities during their trip, experiencing local food and cuisine tops the list for travellers from most markets. Theme parks and outlet shopping are also in the top activities for most. Travellers from India, Singapore, Malaysia, and South Korea are also looking to do shopping on the high street.

Regional TOP 3: 1. Local Food and Cuisine 2. Theme Parks 3. Outlet Shopping



- 1. Local food and cuisine
- 2. Nature tours/safaris
- 3. Outlet shopping AND Theme parks (tie)



- 1. Local food and cuisine
- 2. Theme parks
- 3. Outlet shopping



- 1. Local food and cuisine
- 2. Theme parks
- 3. Museums/exhibits



- 1. Local food and cuisine
- 2. Outlet shopping
- 3. Theme parks



- 1. Theme parks
- 2. High street shopping
- 3. Local food and cuisine



- 1. Local food and cuisine
- 2. Outlet shopping
- 3. High street shopping



- 1. Local food and cuisine
- 2. Outlet shopping
- 3. High street shopping



- 1. Local food and cuisine
- 2. High street shopping
- 3. Theme parks

Q::Which of the following types of experiences or activities are you interested in doing during your travels? Base: 2016; n = 2441

Top Activities on Leisure Trip to Japan

Shopping and hot springs along with sightseeing are the popular activities for both mainland Chinese and Hongkonger visitors on their latest trip to Japan. Visitors from Hong Kong are however more interested in local food and sportier activities, like, skiing, swimming and hiking.



Travellers from China



Q: What activities did you do during your latest leisure trip? Base: China, n= 65; HK, n=108



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Preferred Travel Brands

TOP 3 Airlines Flown with in the Last 12 Months

Local airlines in each market command the lion's share of past 12 month air travel. Singapore Airlines, Cathay Pacific, and Japan Airlines were able to make it to the top 3 airlines used in more than one foreign market.

China

1. Air China
2. China Southern Airlines
3. China Eastern Airlines

Hong Kong

1. Cathay Pacific
2. Dragon Air
3. Japan Airlines

REGIONAL TOTAL

1. Singapore Airlines
2. Cathay Pacific
3. Japan Airlines

Japan

1. ANA
2. Japan Airlines
3. Singapore Airlines

South Korea

1. Korean Air
2. Asiana
3. Japan Airlines

Taiwan

1. China Airlines
1. EVA Air
2. Cathay Pacific

Singapore

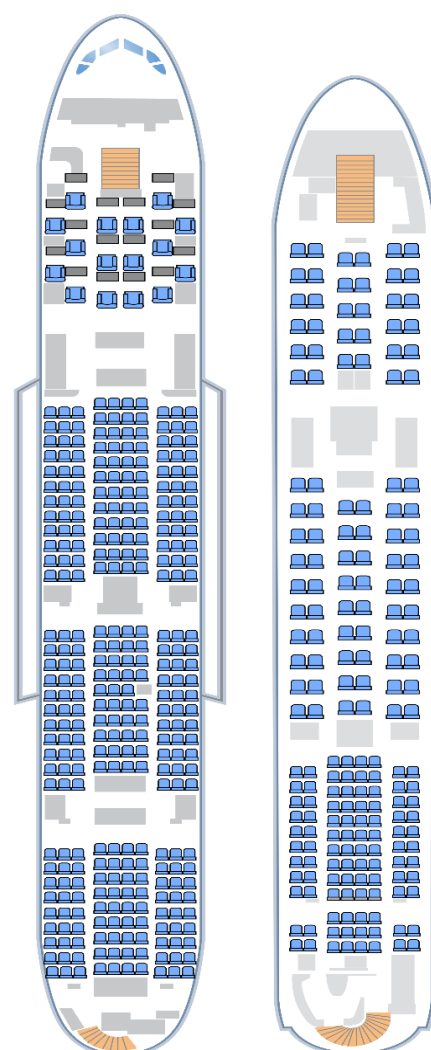
1. Singapore Airlines
2. Cathay Pacific
3. Air Asia

Malaysia

1. Air Asia
2. Malaysia Airlines
3. Singapore Airlines

India

1. Air India
2. Jet Airways
3. Indigo



Q: Which of the following AIRLINE brands have you flown with in the last twelve months or are planning on flying with the next twelve months? (Last 12M) ; Base: 2016; n = 2441

Class of Service for Air Travel Trends

Overall the trend in the region is to upgrade air travel to a higher class of service. Travellers from India and Japan show the biggest increase in upgrading their travel to First or Business Class. At the same time the traveling population from China, Taiwan and Hong Kong are increasingly likely to opt for Economy Class.

| Row % | | Economy /Tourist | Premium Economy | Business | First | n |
|-------|------|------------------|-----------------|----------|-------|-----|
| India | 2015 | 47% | 30% | 17% | 6% | 332 |
| | 2016 | 32% | 34% | 21% | 12% | 302 |
| Japan | 2015 | 59% | 22% | 17% | 3% | 254 |
| | 2016 | 47% | 22% | 25% | 6% | 287 |

Q: Which class of service do you most often purchase airline tickets for when you are paying for them yourself?; Base: Air ticket purchasers



Emirates A380. – First Class. Bill Holler. Some Rights Reserved.

TOP 3 Cruise Lines Travelled with in the Last 12 Months

Approximately 10% of the affluent travellers in the region have gone on a cruise in the past 12 months, with India, Singapore and Malaysia being the most popular markets. Star Cruises is the leading cruise line for the past 12 months among travellers in the region. Royal Caribbean and Princess Cruises have also been popular but lag behind in most markets.

China

- 1. Star Cruises
- 2. Royal Caribbean
- 3. Princess Cruises and Costa Cruises (tie)

Hong Kong

- 1. Star Cruises
- 2. Royal Caribbean
- 3. Disney Cruise Line and Regent Seven Seas (tie)

Taiwan

- 1. Star Cruises
- 2. Princess Cruises
- 3. Disney Cruise Line and Regent Seven Seas (tie)

Japan

- 1. Star Cruises
- 1. Disney Cruise Line
- 3. Royal Caribbean

South Korea

- 1. Royal Caribbean
- 1. Oceania Cruises
- 1. Holland America Line

Singapore

- 1. Star Cruises
- 2. Royal Caribbean
- 3. Princess Cruises

Malaysia

- 1. Star Cruises
- 2. Royal Caribbean
- 2. Princess Cruises

India

- 1. Star Cruises
- 2. Princess Cruises
- 2. Oceania Cruises
- 2. Costa Cruises

Q: Which of the following CRUISE LINES have you travelled with in the last twelve months or are planning on traveling with the next twelve months? Base: 2016; n = 2441

REGIONAL TOTAL

- 1. Star Cruises
- 2. Royal Caribbean
- 3. Princess Cruises



TOP 3 Cruise Lines to Travel with in the Next 12 Months

On average, 18% of travellers in the region are indicating intent to go on a cruise in the next 12 months. Star Cruises is also the most popular choice for future cruise travel, but just barely. Its closest rival, Royal Caribbean, has higher preference for future travel intent in China, Singapore, and HK. Disney is the most popular choice in Japan.

China

- 1. Royal Caribbean
- 2. Princess Cruises
- 3. Costa Cruises

Hong Kong

- 1. Royal Caribbean
- 2. Star Cruises
- 3. Princess Cruises and Disney Cruise Line (tie)

Taiwan

- 1. Star Cruises
- 2. Princess Cruises
- 3. Regent Seven Seas

Japan

- 1. Princess Cruises
- 1. Disney Cruise Line
- 3. Crystal Cruises

South Korea

- 1. Royal Caribbean
- 1. Star Cruises
- 1. Disney Cruise Line

Singapore

- 1. Royal Caribbean
- 2. Star Cruises
- 3. Princess Cruises

Malaysia

- 1. Star Cruises
- 2. Royal Caribbean
- 2. Princess Cruises and Disney Cruise Line (tie)

India

- 1. Star Cruises
- 2. Royal Caribbean
- 3. Celestyal Cruises

Q: Which of the following CRUISE LINES have you travelled with in the last twelve months or are planning on traveling with the next twelve months? Base: 2016; n = 2441

REGIONAL TOTAL

- 1. Star Cruises
- 2. Royal Caribbean
- 3. Princess Cruises





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Travel and Luxury Choices

Travelling More Luxuriously and Luxury Purchase during Travels (top-2-box)

More than half of travellers in all markets agree that they expect to be traveling more luxuriously in the next 12 months compared to the previous 12 months. However there are fewer saying this than in 2015 all markets except Japan where it is unchanged at 70%.

| | | "I will travel more luxuriously" | n |
|-----------------|------|----------------------------------|-------|
| Total | 2015 | 70% | 2,932 |
| | 2016 | 68% | 2,441 |
| China | 2015 | 70% | 380 |
| | 2016 | 68% | 300 |
| SG | 2015 | 72% | 368 |
| | 2016 | 70% | 306 |
| Taiwan | 2015 | 71% | 352 |
| | 2016 | 64% | 307 |
| HK | 2015 | 78% | 356 |
| | 2016 | 77% | 305 |
| Japan | 2015 | 70% | 361 |
| | 2016 | 70% | 307 |
| Malaysia | 2015 | 70% | 361 |
| | 2016 | 68% | 304 |
| S.Korea | 2015 | 74% | 380 |
| | 2016 | 73% | 306 |
| India | 2015 | 57% | 374 |
| | 2016 | 52% | 306 |

Q: Please rate how strongly you agree with each of the following statements.
(Completely agree + Somewhat agree) Base: Total sample; n = 5373

There has been an overall increase in preference for travel destinations that provide luxury shopping opportunities. The increase is most notable in India, and also in Singapore, while there has been a notable drop in Taiwan. Taiwanese travellers are also less likely than before to state that they mainly buy luxury brands when travelling, as are Hongkongers and Malaysians. At the same time, there has been a notable increase among Japanese and Indian travellers to say that they mainly shop for luxury during travels.

| | | "I mainly buy luxury brands when travelling" | "I prefer travel destinations where I can buy luxury products" | n |
|-------------|------|--|--|-------|
| Total | 2015 | 51% | 46% | 2,932 |
| | 2016 | 52% | 50% | 2,441 |
| China | 2015 | 66% | 66% | 380 |
| | 2016 | 66% | 69% | 300 |
| India | 2015 | 61% | 62% | 374 |
| | 2016 | 74% | 79% | 306 |
| Singapore | 2015 | 49% | 35% | 368 |
| | 2016 | 47% | 43% | 306 |
| Hong Kong | 2015 | 47% | 42% | 356 |
| | 2016 | 37% | 46% | 305 |
| Malaysia | 2015 | 52% | 42% | 361 |
| | 2016 | 47% | 40% | 304 |
| South Korea | 2015 | 48% | 36% | 380 |
| | 2016 | 51% | 44% | 306 |
| Taiwan | 2015 | 50% | 46% | 352 |
| | 2016 | 43% | 39% | 307 |
| Japan | 2015 | 38% | 35% | 361 |
| | 2016 | 48% | 40% | 307 |

Q: Please rate how strongly you agree with each of the following statements.
(Completely agree + Somewhat agree) Base: Total sample; n = 5373

Luxury Purchase Preferences in Asia

(top-2-box)

The majority of travellers in the region are interested in finding the best deals on luxury brands, and they are likely to buy them when they are tax free. Half say that they mainly buy luxury products when traveling, and as many prefer travel destinations where they can shop for luxury products, especially travellers from India and China.



It is important for me to get the best possible price when buying luxury brands:

69%

I mainly buy luxury brands when I can get them tax free:

58%

I like to buy luxury items outside my home city because of the better selection offered:

56%

When travelling I prefer to purchase luxury items at the airport rather than in the destination city:

40%

I prefer travel destinations where I can buy luxury products:

50%

I mainly buy luxury brands when travelling:

52%

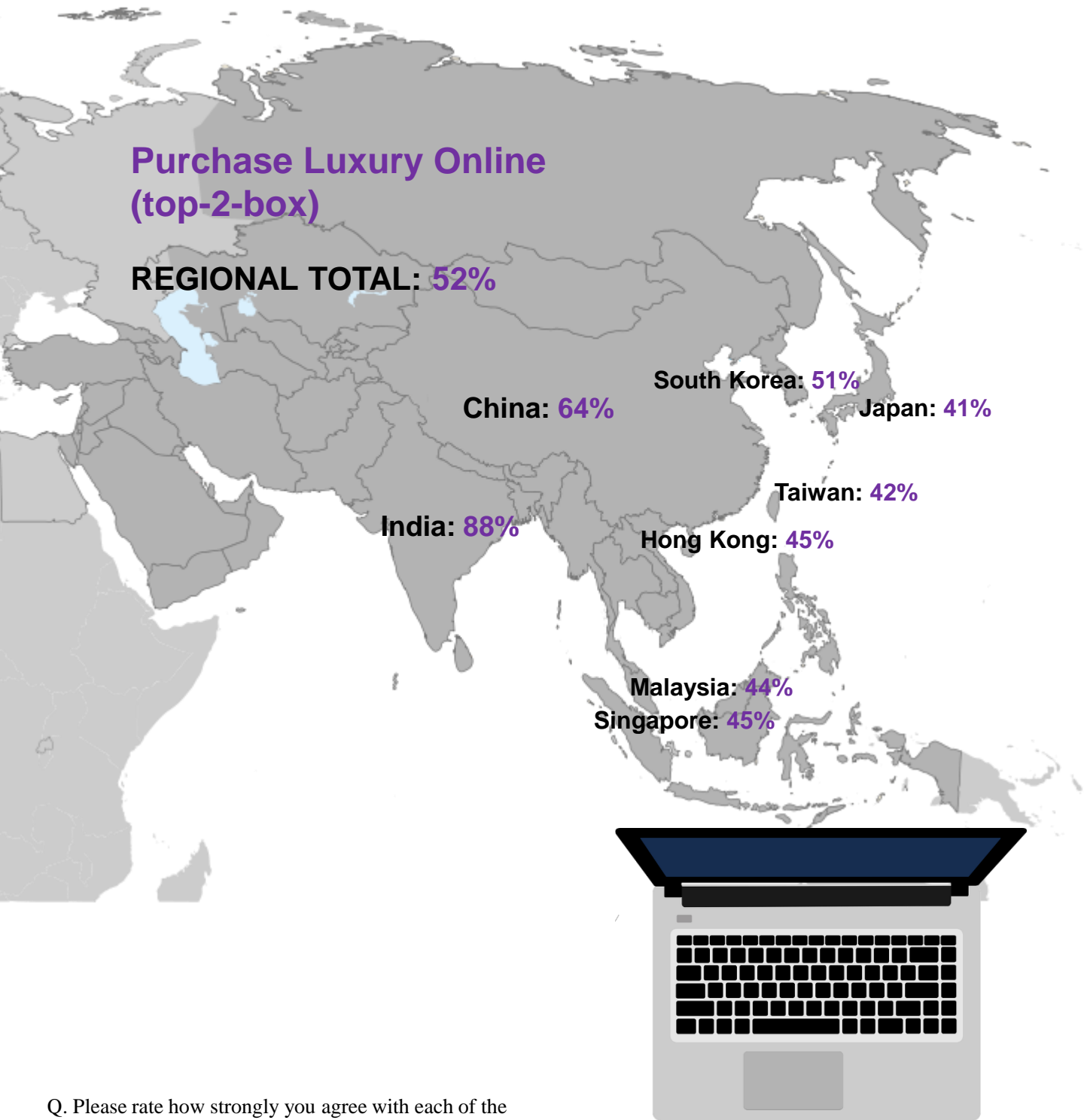
I would buy a new and unused luxury product from an individual who is reselling it:

38%

Q: Please rate how strongly you agree with each of the following statements.
(Completely agree + Somewhat agree); Base: 2016; n = 2441

Luxury through Digital Channels

In 2016, overall, almost 70% research luxury products online, more than 50% on their mobile phone. More than 1 in 2 purchase luxury products online and almost 1 in 3 purchase on their mobile phones. Almost as many purchase online from outside their country as do from within. India stands out as a market where Luxury has been digitalized, even much more than in China.



Q. Please rate how strongly you agree with each of the following statements. (Completely agree + Somewhat agree)
Base: 2016: n = 2441

Compared to 2015, there has been slight increase in the number of those who research and buy luxury online. However Hong Kong and Taiwan are markets where we see a dip in both numbers from last year. On the other hand, we are seeing a significant increase in the number of those both researching and purchasing luxury online in India, making it clearly the leading market for both, and leaving China far behind. South Korea has also shown increase in both numbers but from a much lower level.

| | | “I research luxury products online” | “I purchase luxury products online” | n |
|-------------|------|-------------------------------------|-------------------------------------|-------|
| Total | 2015 | 67% | 51% | 2,932 |
| | 2016 | 69% | 52% | 2,441 |
| China | 2015 | 75% | 66% | 380 |
| | 2016 | 77% | 64% | 300 |
| India | 2015 | 79% | 79% | 374 |
| | 2016 | 90% | 88% | 306 |
| Singapore | 2015 | 62% | 47% | 368 |
| | 2016 | 69% | 45% | 306 |
| Hong Kong | 2015 | 66% | 48% | 356 |
| | 2016 | 61% | 45% | 305 |
| Malaysia | 2015 | 69% | 42% | 361 |
| | 2016 | 69% | 44% | 304 |
| South Korea | 2015 | 55% | 44% | 380 |
| | 2016 | 59% | 51% | 306 |
| Taiwan | 2015 | 68% | 44% | 352 |
| | 2016 | 65% | 42% | 307 |
| Japan | 2015 | 60% | 38% | 361 |
| | 2016 | 60% | 41% | 307 |



Q. Please rate how strongly you agree with each of the following statements. (Completely agree + Somewhat agree)
 Base: 2016: n = 2441



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Travel Influencers and Awareness

TOP 5 ‘Very Influential’ Factors in Destination Choice in 2016

Feeling safe in a destination is the top consideration in destination choice for most. Many also put a lot of emphasis on the cultural offering at the destination and ease of getting there. Travellers from Singapore, Malaysia, and Korea think about the cost of travel.



1. How safe I would feel at destination
2. Cultural offering in destination
3. Ease of getting into final destination
4. Cost of travel to destination
5. Shopping offering in destination

Q; How influential were the following factors in your choice of destination for your latest trip? (Very much influence)
Base: 2016; n = 2324

TOP 3 How Travel is Researched in Asia

On average more than 4 in 5 research their travel online. Travel research is typically done by the travellers themselves, although there is more reliance on third party help in Japan, S. Korea and Hong Kong. Online travel booking sites are used by most to research their travel, as are online travel review sites. Online videos and social media are important in the process for both Indian and Chinese travellers. The Malaysians also tend to use social media for travel research.

I rely on travel review sites when booking travel:

62%

Social media is important for me when researching travel options:

57%

Online videos are important for me when researching travel options

48%

I research travel options online:

81%

I research my leisure trips myself:

79%

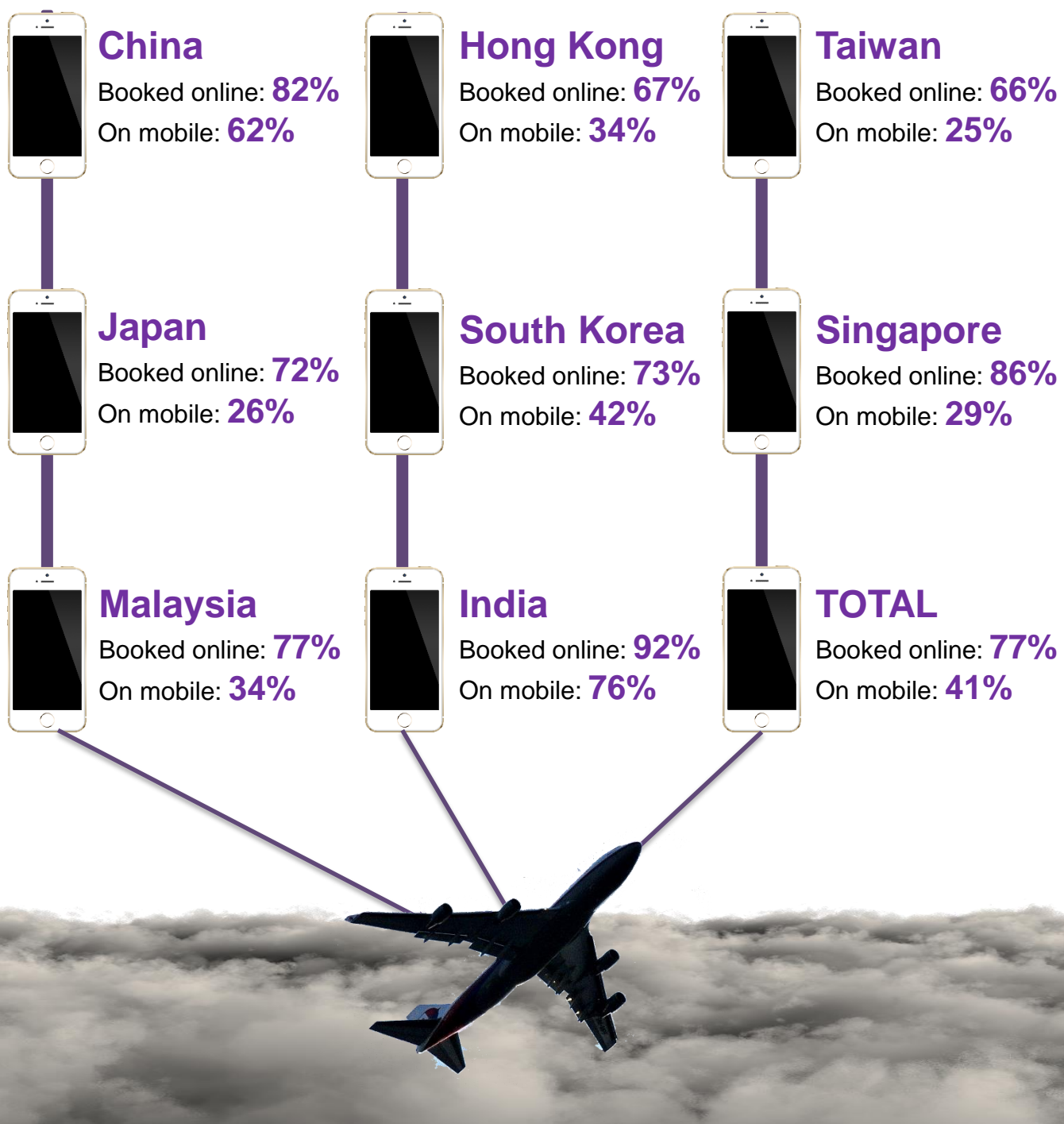
I use online travel booking sites to research my travel:

77%

Q: Please rate how strongly you agree with each of the following statements about your preferences and how you like to book travel. (Completely agree + Somewhat agree); Base: 2016; n = 2441

TOP 3 How Travel is Booked in Asia

Across the region, more than 3 in 4 book travel online, with India, Singapore and China being the leading markets for this. In India and China, the majority book travel on their mobile phone. In all markets except Japan there is preference to book different components of a trip separately.



Q: Please rate how strongly you agree with each of the following statements about your preferences and how you like to book travel. (Completely agree + Somewhat agree) Base: 2016; n = 2441

TOP 3 Awareness Sources: Airlines

Across the region, the top sources for awareness of airlines are social media, online search and brand website. This further indicates that airline brands' digital presence is crucial to win the minds of affluent Asian travellers. However, different to other countries, airport advertisements are still an important source of awareness for the Chinese and Indians.

China

- 1. Social media (net)
- 2. Online search
- 3. Airport

Hong Kong

- 1. Social media (net)
- 2. Online search
- 3. Brand website

Taiwan

- 1. Social media (net)
- 2. Online search
- 3. Recommendation from Friends and Family

Japan

- 1. Online Search
- 2. Social media (net)
- 3. Brand website

South Korea

- 1. Social media (net)
- 2. Online search
- 3. Write-ups on blogs, forums and review sites

Singapore

- 1. Online search
- 2. Social media (net)
- 3. Brand website

Malaysia

- 1. Social media (net)
- 2. Online search
- 3. Brand website

India

- 1. Social media (net)
- 2. Online search
- 3. Airport

REGIONAL TOTAL

- 1. Social media (net)
- 2. Online search
- 3. Brand website

Q: In which of the following places, venues, media or information sources do you look for or pay attention to information or advertising of products and services in the following categories.(Airline tickets)

Base: 2016; Air ticket purchasers n = 2370

TOP 3 Social Media for Awareness

Sources: Airlines

Facebook is the most popular social media website for airlines awareness among affluent Asians, except for the Chinese. This may be caused by it being banned in the country. In China, WeChat is the most popular social media instead. Quite surprisingly, Google+ turns out to be a popular social media for airline awareness as well.

China

- 1. WeChat
- 2. Sina Weibo
- 3. LinkedIn

Hong Kong

- 1. Facebook
- 2. Google+
- 3. Instagram

Taiwan

- 1. Facebook
- 2. Google+
- 3. LinkedIn

Japan

- 1. Facebook
- 1. Google+
- 3. Twitter

South Korea

- 1. Facebook
- 2. Google+
- 3. Instagram

Singapore

- 1. Facebook
- 2. Twitter
- 3. Google+

Malaysia

- 1. Facebook
- 2. Google+
- 3. Instagram

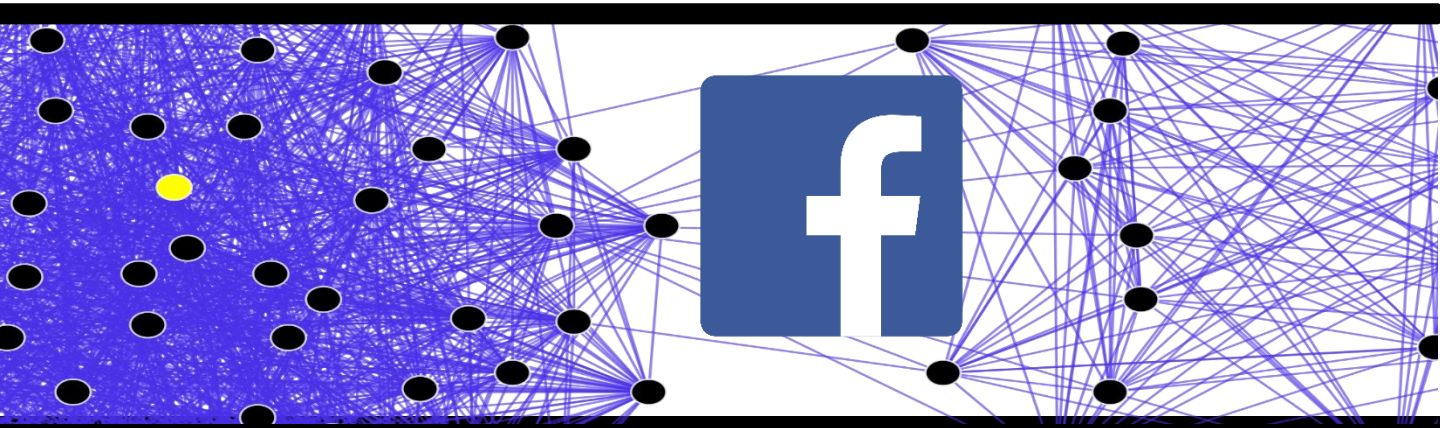
India

- 1. Facebook
- 2. Google+
- 3. Twitter

REGIONAL TOTAL

- 1. Facebook
- 2. Google+
- 3. WeChat

Q: In which of the following places, venues, media or information sources do you look for or pay attention to information or advertising of products and services in the following categories.(Airline tickets)
Base: 2016; Air ticket purchasers n = 2370



TOP 3 Awareness Sources: Hotels

Similar to the top sources for awareness of airlines, affluent Asians deem social media and online search as top sources of awareness for hotels. This indicates that hotel brands' digital presence is also crucial in winning the minds of affluent Asian travellers. In addition, recommendation from friends and family is also a top source of awareness for hotels, which implies that hotels should not underestimate the power of word of mouth marketing.

China

1. Social media (net)
2. Online search
3. Recommendation from friends and family

Hong Kong

1. Social media (net)
2. Online search
3. Recommendation from friends and family

Taiwan

1. Social media (net)
2. Online search
3. Recommendation from friends and family

Japan

1. Online Search
2. Social media (net)
3. Brand website

South Korea

1. Social media (net)
2. Online search
3. Write-ups on blogs, forums and review sites

Singapore

1. Online search
2. Social media-net
3. Brand website

Malaysia

1. Social media (net)
2. Online search
3. Recommendation from friends and family

India

1. Social media (net)
2. Online search
3. Recommendation from friends and family AND Brand website (tie)

REGIONAL TOTAL

1. Social media -net
2. Online search
3. Recommendation from friends and family

Q: In which of the following places, venues, media or information sources do you look for or pay attention to information or advertising of products and services in the following categories.(Hotels)

Base: 2016; Hotel Visitors n = 2370

TOP 3 Social Media for Awareness

Sources: Hotels

Similar to airlines, Facebook is the most popular social media source of awareness for hotels, except for China, which as mentioned before, may be caused by it being banned in the country. Google+ turns out to be a popular social media well. Unlike airlines, for hotels, Instagram also takes a spot in one of the top social media sources.

China

1. WeChat
2. Sina Weibo
3. Google+

Hong Kong

1. Facebook
2. Google+
3. Instagram

Taiwan

1. Facebook
2. Google+
3. LinkedIn

Japan

1. Facebook
1. Google+
3. Twitter

South Korea

1. Facebook
2. Google+
2. Twitter

Singapore

1. Facebook
2. Google+
3. Instagram

Malaysia

1. Facebook
2. Google+
3. Instagram

India

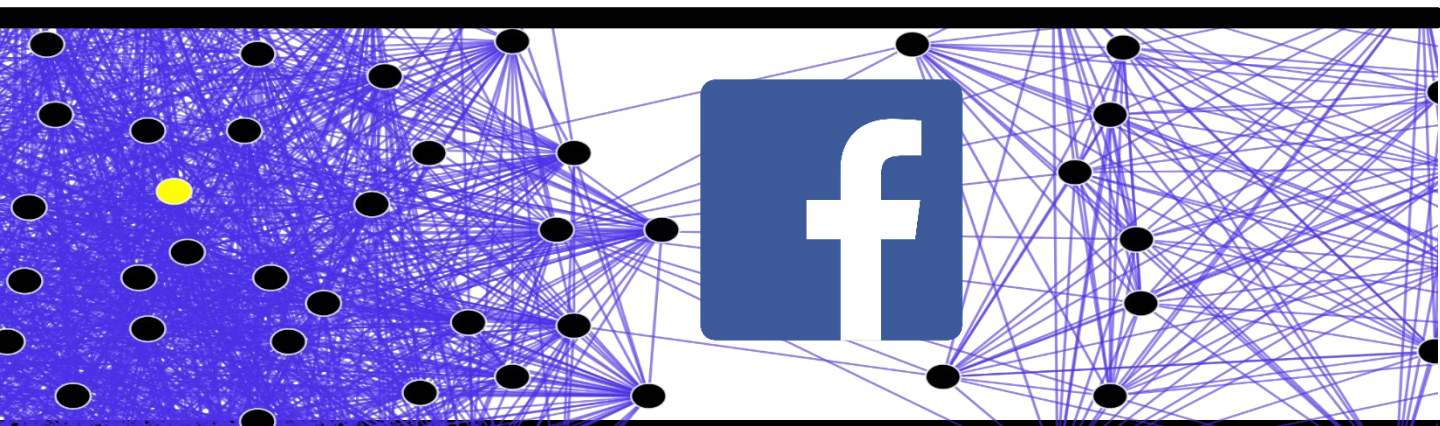
1. Facebook
2. Google+
3. Twitter

TOTAL

1. Facebook
2. Google+
3. Instagram

Q: In which of the following places, venues, media or information sources do you look for or pay attention to information or advertising of products and services in the following categories.(Hotels)

Base: 2016; Hotel Visitors n = 2359



What does it mean to me as a brand?

- **I can expect travel to grow.** Optimism is even higher than a year ago for affluent travellers in the region to increase their overseas vacationing.
- **I need to meet travellers expectations of luxury.** The new traveller is seeking luxury in the way they travel - Indians are wanting to fly first class and stay in five star hotels. 7 in 10 Affluent Asians plan to travel more luxuriously.
- **You should not focus only on the Chinese traveller.** While China is the leading leisure travel source market, Singaporeans are the most frequent travellers, and while Tokyo is a top destination for the Chinese visitors, tourists across the region are now heading there.
- **Travellers are looking for opportunities to shop for luxury brands.** Travel and luxury shopping go hand in hand, and is a major motivator for choosing travel destinations.
- **Travellers are going beyond sightseeing and looking for experiences.** Travellers in the region are becoming adventurous, and on the look for new destinations they have not yet explored, and where they can also get new experiences; e.g., travellers from HK are going to Japan to ski and Chinese travellers have nature tours and safaris at the top of their list.
- **Just having a website for booking is not enough, it must also be mobile optimized and available through apps.** Travel is no longer only booked online, but in markets like China and India most are now booking travel on their mobile phones.

Methodology

This report is based on the Affluent Insights™ 2016 Luxury Travel Report, which includes finding from the 2015 (for trending) and 2016 Affluent Insights Travel Surveys.

- Fielded online in April/May 2016 (May/June for 2015)
- Covers eight Asian markets: China, India, Hong Kong, Singapore, Malaysia, South Korea, Taiwan, Japan.
- In each market, we surveyed 300+ respondents (in 2015, 350+).
- All of the respondents were defined as affluent with annual household incomes as per the table below, and have travelled internationally for leisure or business in the past 12 months (some upward adjustments were made to income criteria in some markets from 2015).
- The total number of affluent travellers interviewed across 2015/2016 was 5,373.

| Country | Affluent Definition (HHI/a) | 2015 Sample Size n | 2016 Sample Size n |
|-------------|-----------------------------|--------------------|--------------------|
| China | CNY 200,000+ | 380 | 300 |
| India | INR 12,00,000+ | 374 | 306 |
| Singapore | SGD 110,000+ | 368 | 306 |
| Hong Kong | HKD 720,000+ | 356 | 305 |
| Malaysia | MYR 120,000+ | 361 | 304 |
| South Korea | KRW 78 million+ | 380 | 306 |
| Taiwan | TWD 960,000+ | 352 | 307 |
| Japan | JPY 10 million+ | 361 | 307 |

About Agility Research & Strategy

Agility is a World Class Research and Consulting company with a core focus on the Affluent and Luxury Consumers for premium brands. With over 30 years combined experience in understanding the Affluent consumer, we are truly Fluent on the Affluent™.

We partner with leading brands in helping to provide actionable insights through a suite of solutions that lead to growing their market share.

Affluential, powered by Agility is a leading consumer intelligence portal helping brands engage with Affluent consumers in more than 20 key economies across the United States, Europe and Asia.

LuxeTalk is our exclusive luxury market research community comprised of affluent and HNW individuals interested in sharing their thoughts on luxury in exchange for cash, rewards, or contributions to their favourite charity.

Our clients in the travel and hospitality sector include:

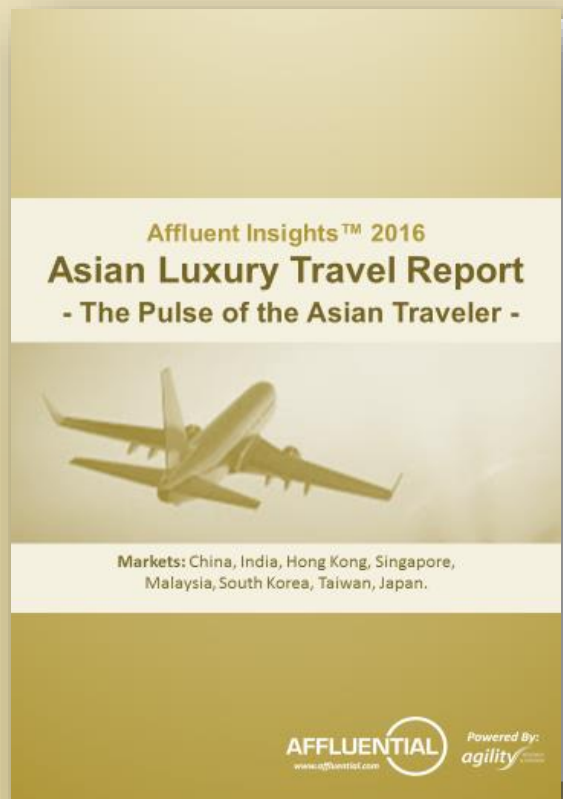


About ILTM Asia

International Luxury Travel Market Asia 2016 is a four day event taking place in Shanghai from 30th May to 2nd June 2016. Its aims are to introduce luxury travel buyers from Asia to a plethora of international travel trends and experiences, and to enable an avenue for key players to build valuable relationships and exchange innovative business ideas in an elegant, and yet energetic setting.

Affluent Insights™ 2016 Luxury Travel Report

-The Pulse of the Asian Traveller-



A full report with additional topic areas and detailed reporting on eight Asian markets available for purchase.

For further information please write to us at:
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