

# Category Spotlight

Travel & Tourism - Revisited



# Agenda

**1**

**Reaching the  
target market**

**2**

**Sector challenges  
and how to  
address them**

**3**

**Case studies &  
showcases**

# New global JCDecaux research

## Travel & Tourism 2024

Conducted in  
15 countries



Australia  
Spain  
Brazil  
China  
France  
Germany  
Hong Kong  
Japan  
Italy  
South Africa  
Saudi Arabia  
Singapore  
United Arab Emirates  
United Kingdom  
United States

Exclusive insights & stats from  
3,000 consumers surveyed



*(n=200 / country)*

# 1

Reaching the target market

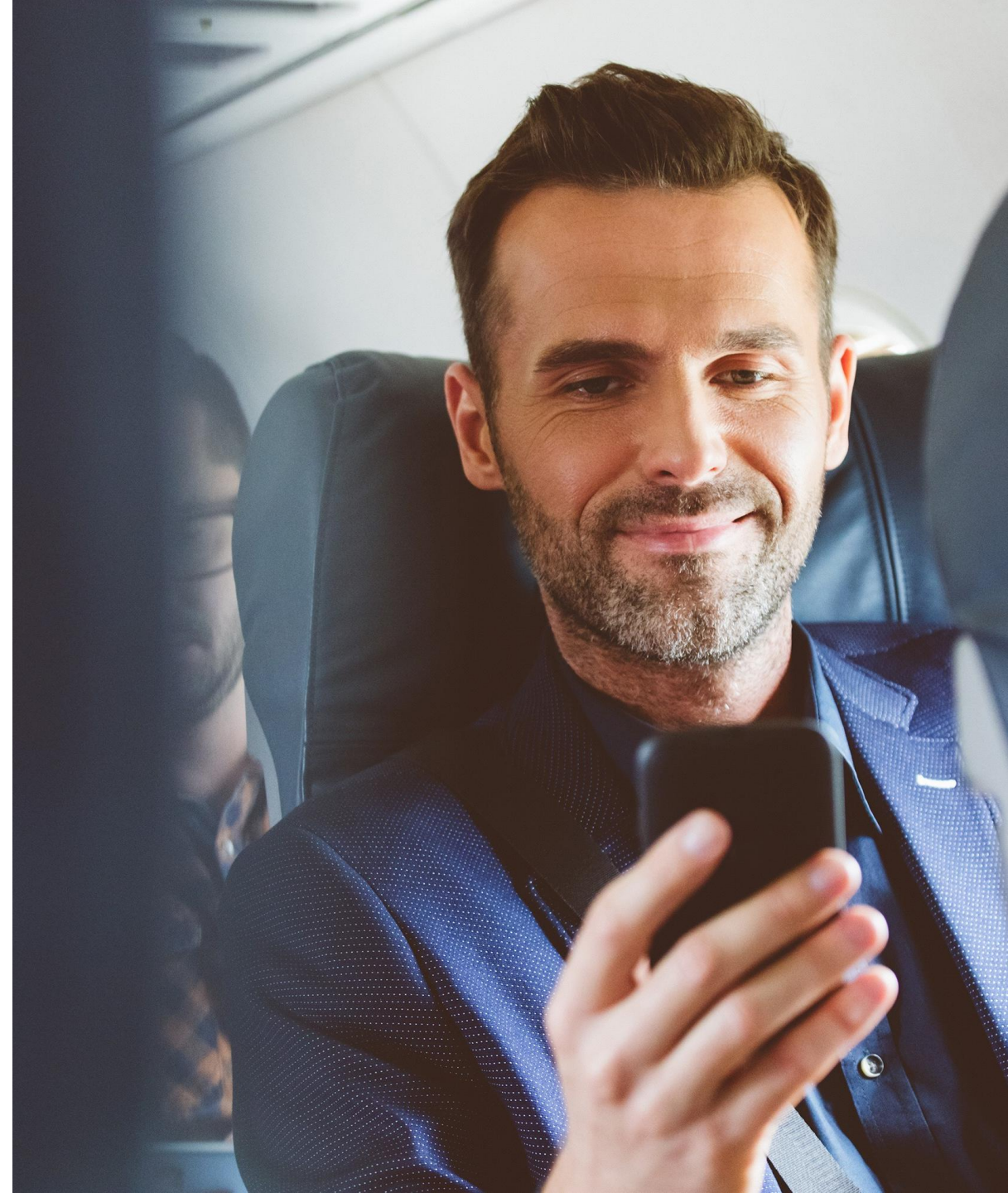


# The recovery continues

Tremendous contribution towards the global e

In 2024, Travel & Tourism industry's **global economic contribution** is set to reach an all-time high of **\$11.1 trillion**

**By 2034**, the sector will supercharge the global economy with a staggering **\$16TN**, making up **11.4%** of the entire economic landscape.





## Global travel sours: tourist numbers on the rise

Global – Q1 2024 YoY Air Travel

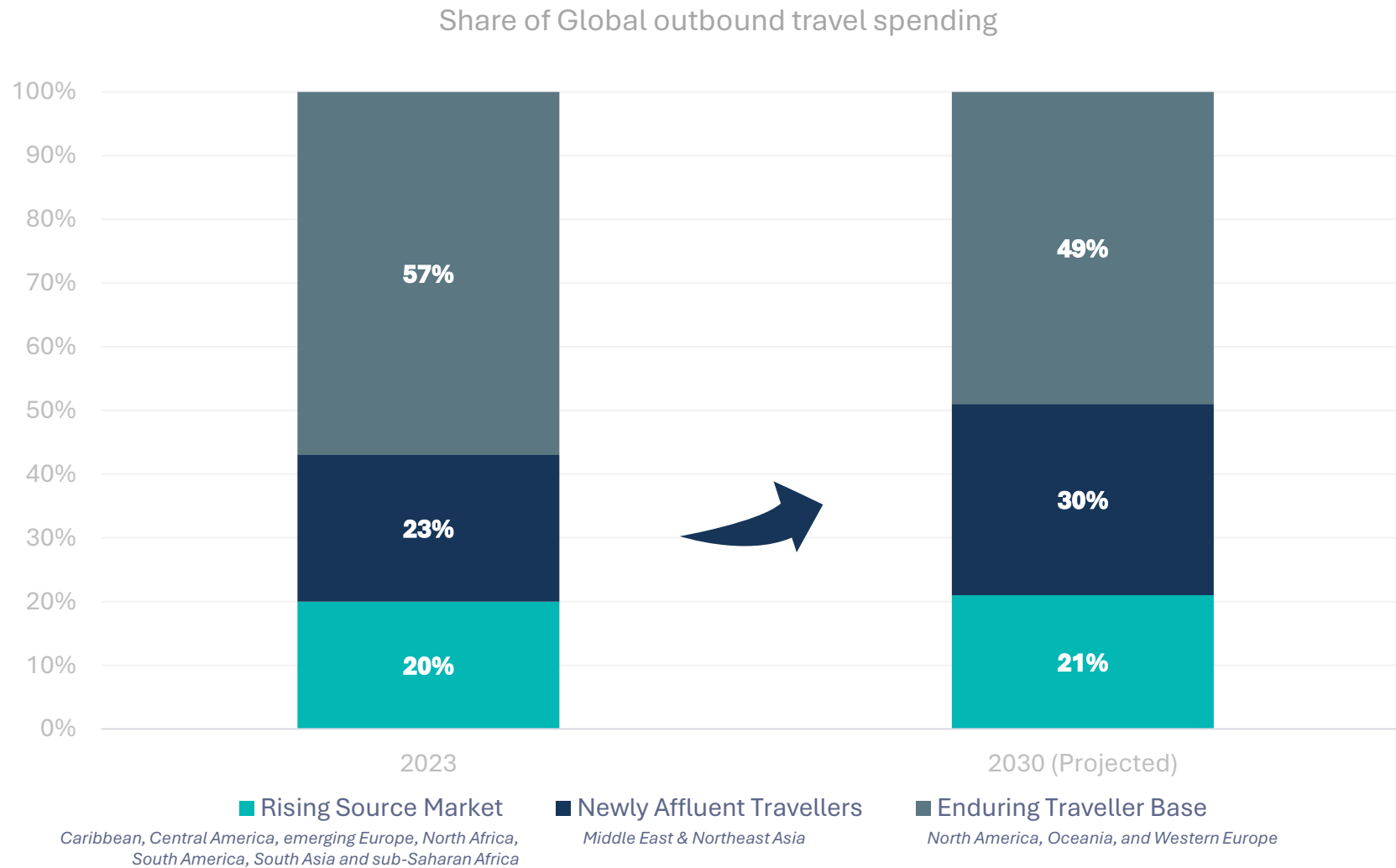
**+14%** EMEA

**+13%** APAC

**+10%** America

# Newly affluent travellers are on the rise

## Emerging travel hotspots: a look at outbound travel growth in the future





# Reaching your ideal holidaymaker

## Baby Boomers

- Embrace familiarity

## Gen X

- More inclined towards family trips
- Experiences that are perceived as high quality

## Gen Y / Millennials

- Seek unique experiences however with a set budget (monitor exchange rates)
- However, also embrace the concept of solo travel

## Gen Y / Millennials

- Social media, TV shows & films inspire their holiday ideas
- They are encouraged to travel more sustainably

# Unveiling the industry's key trends

AI – beyond automation

Bleisure

Wellness tourism

Craving local experiences

Sustainable tourism



# 2

## Sector challenges and how to address them



## Current choice of media channel: social media

Social media dictates travel choices in the age of influence

**75%**

of travelers rely on social media for travel inspiration

**93%**

of consumers' buying habits are based on reviews, highlighting the significance of social proof in the travel industry.

**86%**

of all ads in the travel industry are up to 30 seconds long



# Like vs life: social media changing travel for the worse?

- **Overcrowding & overtourism – authenticity loss**

63% Gen Y & Z agree that social media fuels tourist surges, risking inflated prices and diluted local experiences

- **Misleading information & false advertising**

60% millennials are inspired to visit a destination because of social media, only to find hidden charges/misleading information

- **False reviews**

65% consumers agree social media travelling recommendations may be paid positive reviews hence may not be trustworthy

- **Creating false expectations**

58% agree social media's portrayal of perfect imagery of a destination sets tourists up for disappointment





**Inspiration on every corner**

**Unleashing your next adventure**

**63%**

of consumers are looking for holiday inspirations when they are out and about in the city

# OOH: fueling destination & travel brand awareness

Boosting brand recognition on the go



**63%**

agree OOH ads increase their awareness regarding different travel companies



**65%**

agree seeing OOH ads on their daily journey increases their awareness about different travelling destinations

# Unlocking inspiration

## Airports: igniting travel dreams

47%

of airport advertising is expected to come from the tourism sector

61%

Gen Y & Gen Z agree airport OOH ads showcasing travel destinations inspire them as a potential future vacation destination



# Incredible creative canvas for emotions

65%

consumers agree that travel OOH ads might **evoke feelings of nostalgia** for a past holiday, prompting them to **plan a new trip**.

68%

feels OOH ads of **breath-taking landscapes/pristine** beaches evoke a **sense of escape** from daily routine



# Tapping into desire

## Destinations added to global travel wishlists



64%

are likely to add a destination to their travel list after being exposed to a digitised OOH with stunning visual of a location

60%

consumers agree that an OOH ad of a sunny destination while it is raining/cold outside triggers a desire to book a holiday



## Targeting workday blues for commuters

Catching consideration: fatigue & foreign fun

62%

of respondents agree encountering travel & tourism OOH ads during work fatigue can trigger consideration of vacation

60%

millennials agree seeing OOH ads for a neighbouring country tempts them to consider booking a quick getaway

# OOH gets smarter

## Timely based messages leads to recall

After seeing OOH ads during daily commute

**61%**

can recall the destination when booking a holiday

**64%**

recall OOH ads which reflect their travelling interests (right message at the right time)



# Travel-loving millennials

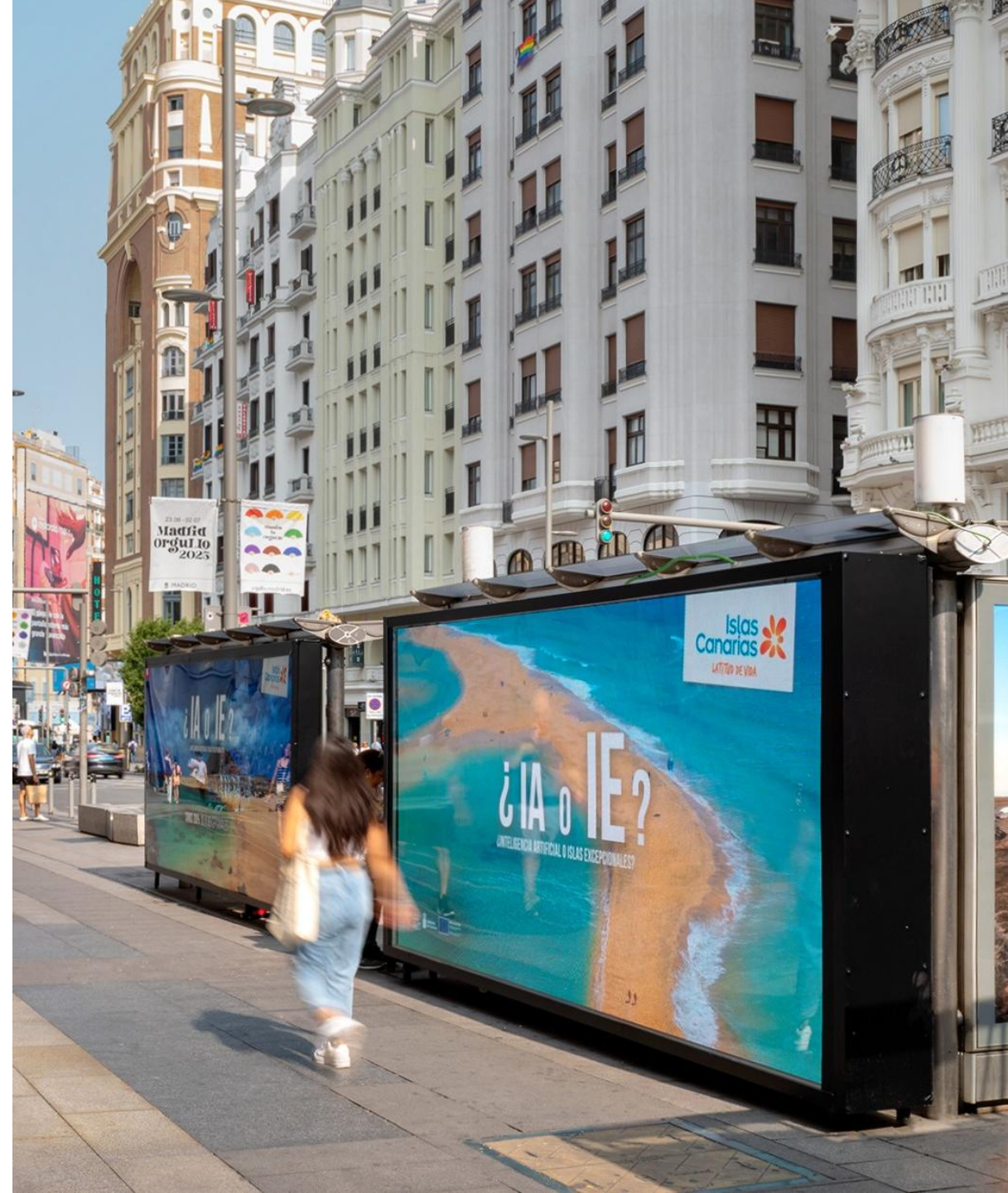
Tempts spontaneous trips & seek local experiences

63%

are tempted to consider booking a holiday after seeing an OOH ad highlighting activities/attraction in another country.

61%

millennials agree OOH ads showcasing local experiences during their vacation add a customisation touch to their experience.



## To sum up, out-of-home...



### ...drives awareness.

- 63% agree OOH ads increase their awareness regarding different travel companies
- 65% agree seeing OOH ads on their daily journey increases their awareness about different travelling destinations

### ...creates emotions

- 65% consumers agree that travel OOH ads might evoke feelings of nostalgia for a past holiday, prompting them to plan a new trip.
- 68% feels OOH ads of breath-taking landscapes/pristine beaches evoke a sense of escape from daily routine

### ...ignites desire

- 64% are likely to add a destination to their travel list after being exposed to a digitised OOH with stunning visual of a location
- 60% consumers agree that an OOH ad of a sunny destination while it is raining/cold outside triggers a desire to book a holiday

### ...encourages consideration

- 62% of respondents agree encountering travel & tourism OOH ads during work fatigue can trigger consideration of vacation
- 60% millennials agree seeing OOH ads for a neighbouring country tempts them to consider booking a quick getaway

# 3

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## Case studies & Showcases



# Promoting the use of Kayak in USA

## Objectives

Aimed to drive brand lift & intent metrics for Kayak through pDOOH.



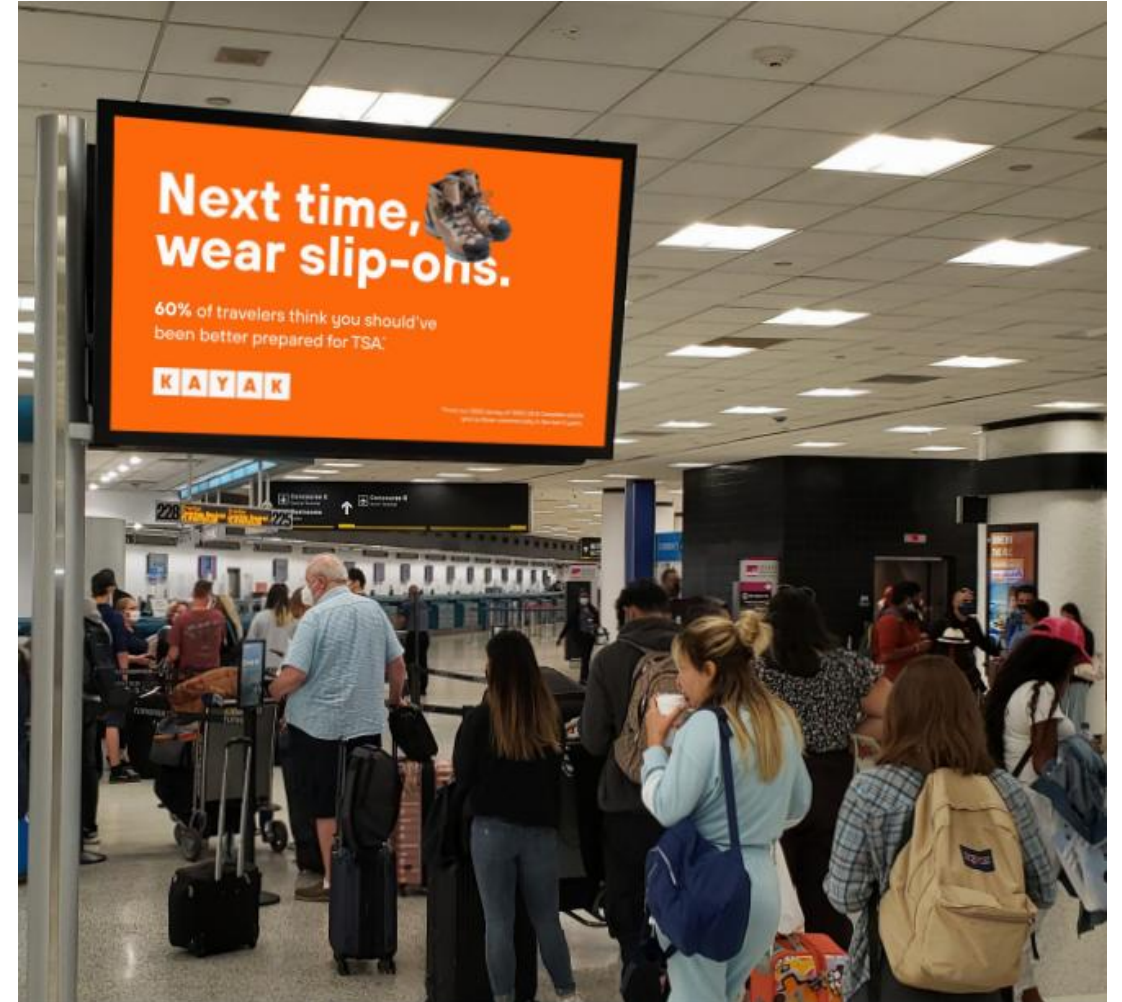
1 month  
2023

## Campaign strategy

Mfour's app, Surveys on the Go, tracks user's locations through GPS signals, noting when the panelist crosses a geofence placed around BOS, LAX, DFW, PIT, MIA and provides them a mobile powered intercept survey.

## Results

Aided Brand Awareness	Aided Ad Recall	Brand Opinion	Consideration	Favorability
<b>+23%</b>	<b>44%</b>	<b>+71%</b>	<b>+28%</b>	<b>46%</b>



# Promoting a luxury hotel chain in Singapore

## Objective

Aimed to raise awareness for the hotel's Loyalty Programme among leisure & business travellers, in 2024.



## Campaign strategy

The brand ran the campaign at T1 Check-in Gallery Lightbox, T3 Immigration Wall Wrap and Digital Network Domination, reaching out to both departure and arriving passengers at multiple touchpoints.

## Results

**50%**  
Ad recall rate

**80%**  
Consider to sign up the  
brand's loyalty  
programme

**36%**  
Searched online  
to find out more  
about the brand's  
accommodation



# Heathrow Terminal 5 – travel company campaign

3 brands (owned by the same parent company)

	Brand 1	Brand 2	Brand 3
<b>Awareness</b>	+9pp	+14pp	+4pp
<b>Consideration</b>	+0.4x	+0.4x	+0.3x
<b>Conversion</b>	+15pp	+0pp	+8pp
<b>Advocacy</b>	+15pp	+2pp	+6pp

Jan – Dec  
2023



# Promoting EVA air in Hong Kong

## Objectives

Aimed to raise brand awareness and drive to online engagement – EVA Air Fly Around The World Game



Jul–Aug  
2024

## Results

**93%** - Likely to participate in the ‘Eva Air Fly Around the World’ game to win free tickets

**89%** - Search for related information online/on social media

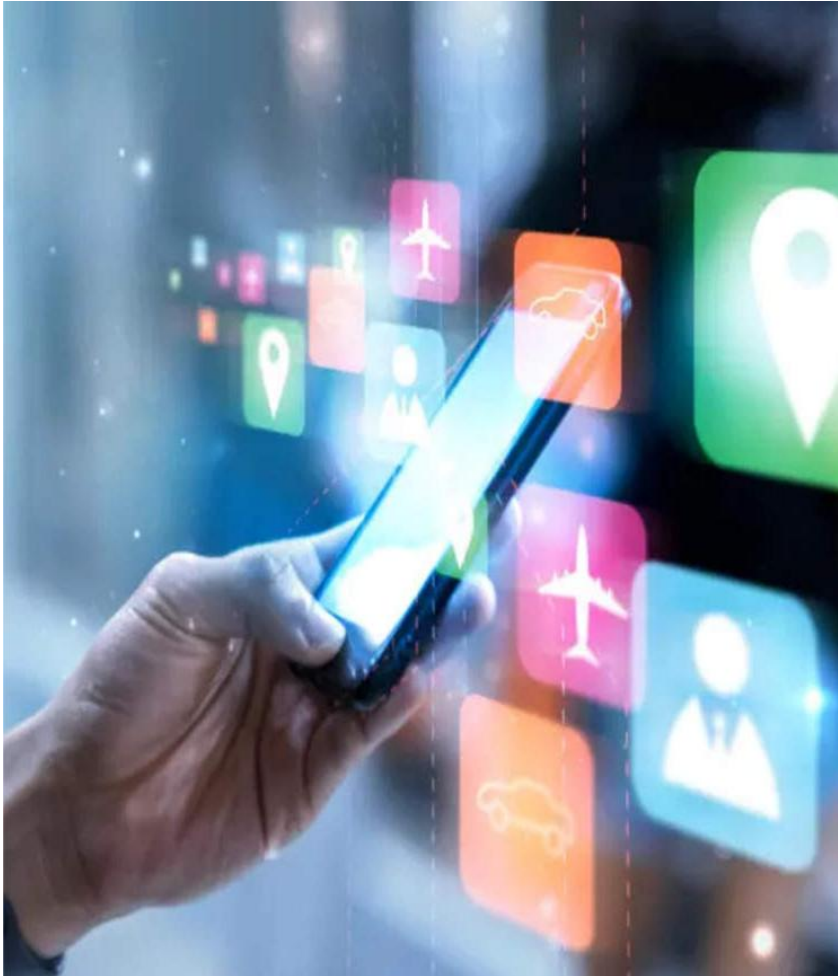
**83%** - Likely to book tickets on the Eva Air official website

**66%** - Brand Recall



# Travelers turn to AI for personalised recommendations

Dining, stays, & activities now powered by intelligence



Share of respondents who selected 'Have Used & Found Helpful' to the question, 'Have you used AI to plan for your travel?'

	Q3 2023	Q1 2024	Shift
United States	23%	19%	-4 pts
France	15%	18%	+3 pts
Germany	16%	20%	+4 pts
United Kingdom	13%	16%	+3 pts
Japan	9%	9%	-
South Korea	15%	21%	+6 pts