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Custom Engagement

Global Booking Anxiety: Asia Pacific

Prepared for: Protect Group



Researched and written by: Pear Anderson

July 2026

Northstar TRAVEL GROUP



About Phocuswright

Phocuswright is the travel industry research authority on how travelers, suppliers and intermediaries connect. Independent, rigorous and unbiased, Phocuswright fosters smart strategic planning, tactical decision-making and organizational effectiveness. Phocuswright delivers qualitative and quantitative research on the evolving dynamics that influence travel, tourism and hospitality distribution. Our marketplace intelligence is the industry standard for segmentation, sizing, forecasting, trends, analysis and consumer travel planning behavior. Every day around the world, senior executives, marketers, strategists and research professionals from all segments of the industry value chain use Phocuswright research for competitive advantage.

To complement its primary research in North and Latin America, Europe and Asia, Phocuswright produces several high-profile conferences in the United States and Europe and partners with conferences around the world. Industry leaders and company analysts bring this intelligence to life by debating issues, sharing ideas and defining the ever-evolving reality of travel commerce.

Phocuswright also operates PhocusWire, a media service that covers the world of digital travel 365 days a year with a range of news, analysis, commentary and opinion from across the travel, tourism and hospitality sector.

The company is headquartered in the United States with Europe and Asia Pacific operations and local analysts on five continents.

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About Web in Travel

Web in Travel provide news through our website and social platforms and run events that are strong in content and different in style and delivery. Our purpose is to take your mind to new places so that together, we can accelerate travel innovation to delight travelers and support local communities.

We launched our first event in 2005 and have been spreading learning through events in Singapore and Asia, including Malaysia, Seoul and Tokyo, New Zealand, and the Middle East and Africa. As part of the Northstar Travel Group, we also have taken our events to Europe and the US. Our flagship event, WiT Singapore, remains our beating heart and the must-attend experience for anyone shaping the future of travel in Asia Pacific.

Through curated content, immersive programming, and events like WiT Bootcamp, the Global Startup Pitch, the Global Travel Tech Thinktank, and The Travel Changemakers Awards, WiT champions innovation, fosters mentorship, and builds bridges across the travel tech ecosystem.

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Methodology

- Web in Travel and Phocuswright fielded an online survey May 8 to 12, 2026, through a YouGov consumer panel, targeting the general population who travel in Malaysia, Singapore, Australia, South Korea, China and Japan
- To qualify for participation in the study, respondents had to meet four criteria: be aged 18 or over, personally play an active role in planning their leisure trips, have taken at least two international leisure trips in the past 24 months and are planning at least one international leisure trip in the next 12 months.
- Survey response metrics for each country are as follows:

Market	Travelers	Error margin
Malaysia	300	+/- 5.7% @ 95%
Singapore	300	+/- 5.7% @ 95%
Australia	300	+/- 5.7% @ 95%
South Korea	300	+/- 5.7% @ 95%
China	300	+/- 5.7% @ 95%
Japan	300	+/- 5.7% @ 95%

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Booking anxiety is reshaping travel purchase behavior.

The industry opportunity is to reduce uncertainty at the point of sale by making flexibility, refundability and protection easier to understand and easier to buy. Refund protection should be positioned primarily around full reimbursement and simple claims, with market-specific messaging.

Analysis Note: This research was conducted during a time of geopolitical instability that may have affected anxiety levels and responses.

Source: Global Booking Anxiety Study 2026

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Executive Summary

Booking anxiety has meaningful commercial implications for international travel and event ticketing.

- It is strongest in Australia and Malaysia where 20% and 19% of travelers respectively, are extremely/very anxious about booking international travel. Event booking anxiety is particularly high in China, where 24% reported being very anxious about purchasing event tickets.
- South Korea travelers are the least anxious by far, with travel booking anxiety at only 2% and event booking anxiety at 3%.
- Anxiety influences how consumers search, book and assess travel platforms. Around half of respondents buy travel insurance and spend more time researching before booking. Others choose refundable options, avoid destinations or events and book closer to the travel or event date to reduce uncertainty.
- Anxiety stems from firsthand experiences with travel disruption.
  - Only 36% of Australia travelers and 39% of Malaysia and Japan travelers had not missed an event or trip for unexpected reasons in the past 12 months.
- Personal cancellations, event rescheduling/cancellation and feeling unsafe traveling to a destination or going to an event have contributed to the perceived need for protection.

Source: *Global Booking Anxiety Study 2026*

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Executive Summary

- Practical and financial concerns are the leading sources of anxiety.
  - Flight cancellations or major delays, changes in personal circumstances, political instability/safety concerns at destination, losing money in case of cancellations, unclear cancellation/refund policies and natural disasters/severe weather are the top concerns
- Anxiety is highest at payment, making the checkout a key opportunity to reassure consumers.
- Consumers highly value flexibility. Lowest-price, non-refundable options are rejected at high levels.
  - Travelers prefer lower-priced options with an optional refund protection add-on at a low extra cost, followed by the higher-priced option with free cancellation.
- Travelers find refund protection that promises 100% money back most appealing.
- Refund protection can impact platform loyalty.
  - Travelers are more likely to use a platform again if refund protection is available.

Source: *Global Booking Anxiety Study 2026*

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Implications for the Travel Industry

- **Flexibility is now a booking conversion tool.** Travelers are actively adjusting behavior in response to booking anxiety, including purchasing travel insurance, spending more time researching, choosing refundable options and abandoning bookings before payment.
  - Travel brands should treat flexible cancellation, refund protection and clear refund terms as conversion levers, not just customer-service features.
- **Checkout is the critical moment to reduce anxiety.** Across markets, anxiety peaks at checkout, making this the point where travelers most need reassurance.
  - Booking platforms should surface cancellation terms, refund eligibility and protection options clearly before payment. Use simple language that explains what is covered, how refunds work and how easy the claims process is.

Source: *Global Booking Anxiety Study 2026*

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Implications for the Travel Industry

- **Refund protection has meaningful commercial upside, especially when positioned around full reimbursement.** Interest in refund protection is substantial, particularly in China and South Korea, and travelers consistently identify "100% money back" as the most appealing feature.
  - Providers should lead with the financial-protection message, then support it with proof points around speed, ease of claims and breadth of coverage.
- **Market strategy should be tailored, not uniform.**
  - Australia, Malaysia and China represent the strongest near-term opportunity due to solid purchase intent, prior use and high travel/event anxiety.
  - In Singapore, the opportunity is more educational: Travelers need clearer differentiation between refund protection, flexible booking policies and traditional travel insurance.
  - South Korea exhibits the lowest anxiety overall, but shows very high purchase intent among those engaged. Refund protection could be positioned as a smart upgrade instead of an urgent must-have.
  - In Japan, mid-to-high purchase intent coexists with many undecided travelers, making reliability and clarity important to highlight.

Source: *Global Booking Anxiety Study 2026*

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Detailed Findings

Traveler and Trip Profile

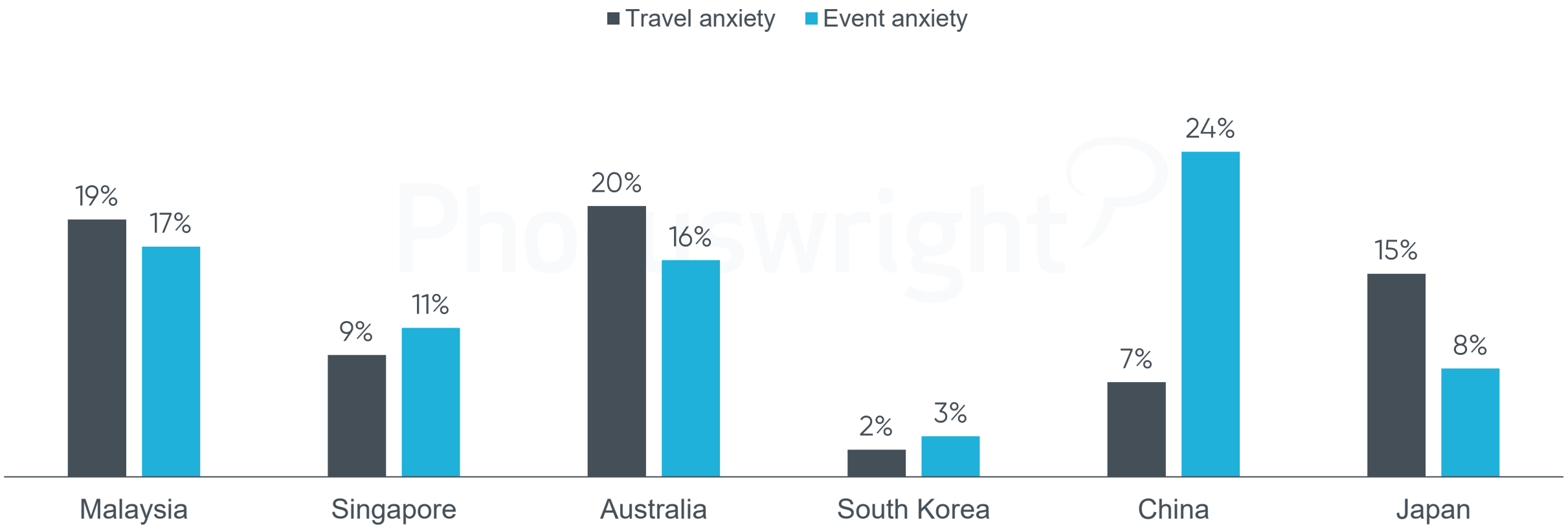
Market	% Under Age 45	% of 2-3 International Leisure Trips P24M	% of 2-3 International Leisure Trips N12M
Malaysia	74%	72%	60%
Singapore	76%	49%	65%
Australia	81%	88%	67%
South Korea	40%	77%	51%
China	96%	62%	50%
Japan	40%	70%	42%

Question: Please enter your age below. Select one.; How many international leisure trips have you taken in the past 24 months?; How many international leisure trips are you planning to take in the next 12 months?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Australia and Malaysia exhibit the highest travel anxiety, while events provoke anxiety in Chinese travelers.

Extremely/Very Anxious: Level of Anxiety When Booking/Purchasing



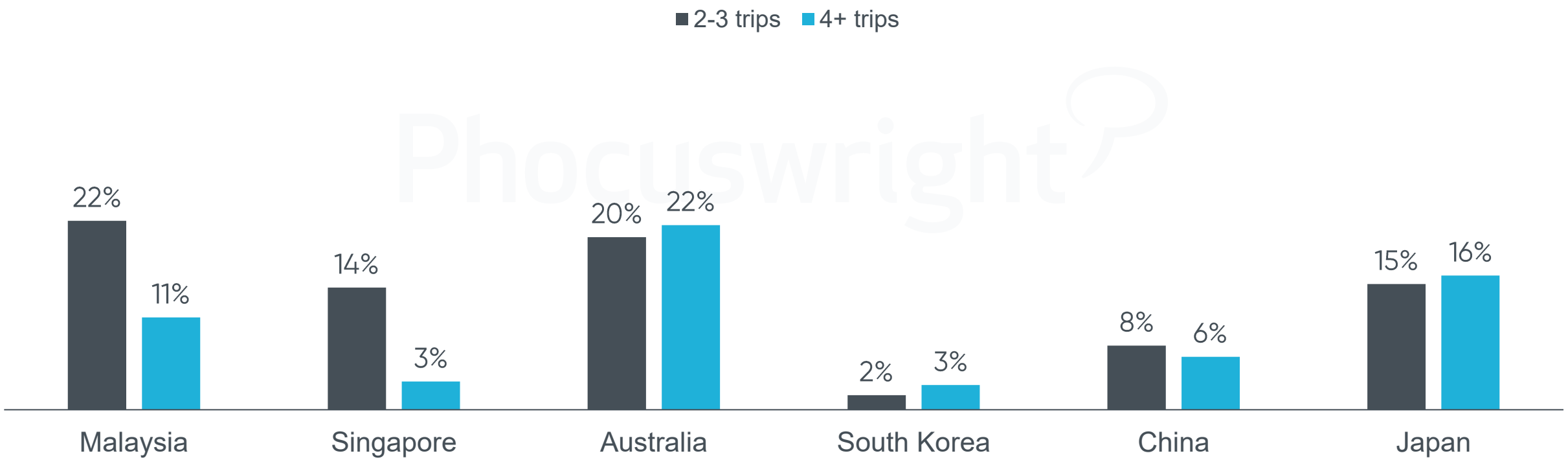
Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Travel frequency does not correlate directly to anxiety.

Frequent Australian and Japanese travelers are slightly more anxious, while less frequent travelers in Malaysia and Singapore show higher anxiety.

Extremely/Very Anxious: Level of Anxiety When Booking/Purchasing Travel, by Number of International Leisure Trips

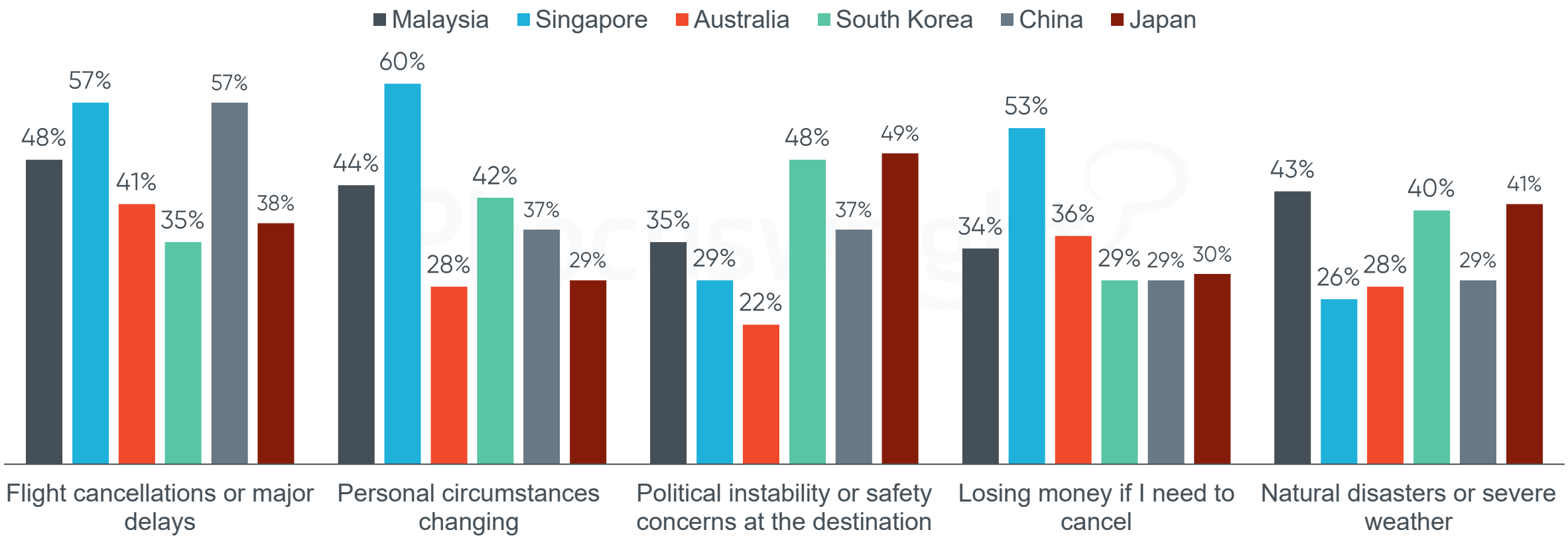


Question: When you think about booking an international trip, how anxious do you generally feel?; How many international leisure trips have you taken in the past 24 months?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Flight disruptions and changing personal circumstances are key drivers for booking anxiety.

General Anxiety Top Drivers When Booking



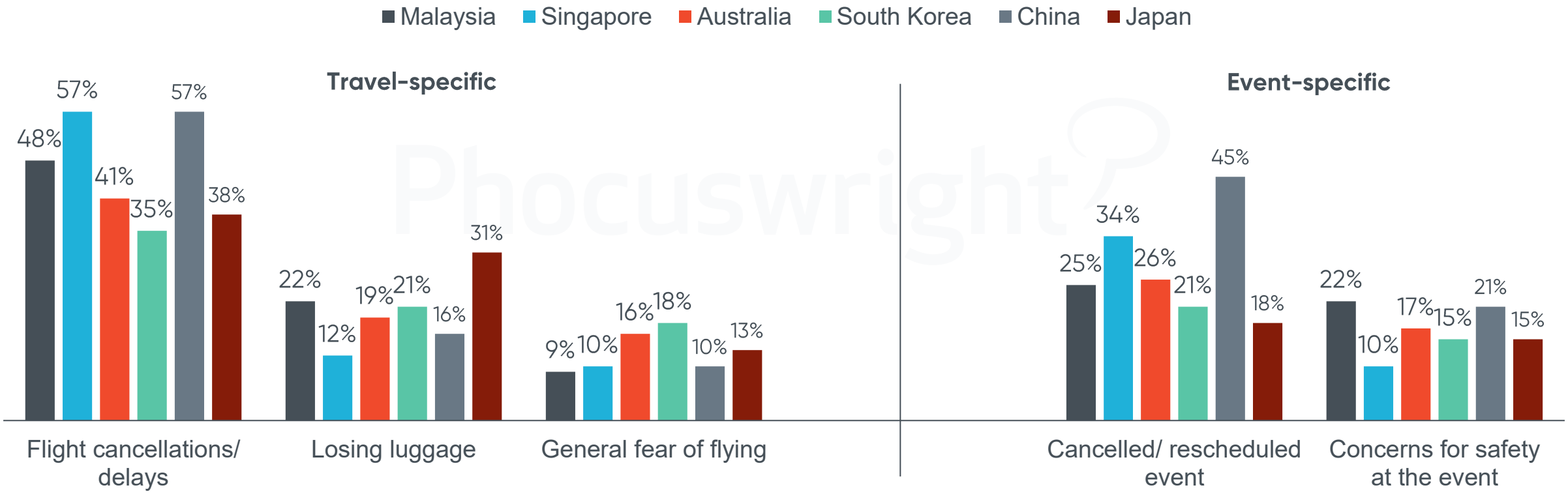
Question: Which of the following factors cause you the most anxiety when booking international travel or event tickets? Select up to five.
Base: Travelers who have anxiety (Malaysia N=268; Singapore N=258; Australia N=238; South Korea N=201; China N=282; Japan N=248)
Source: *Global Booking Anxiety Study 2026*

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Event cancellations are the biggest cause of event-specific anxiety.

Anxiety related to flight disruptions impact 39%-60% of travelers.

Travel and Event Anxiety Drivers When Booking

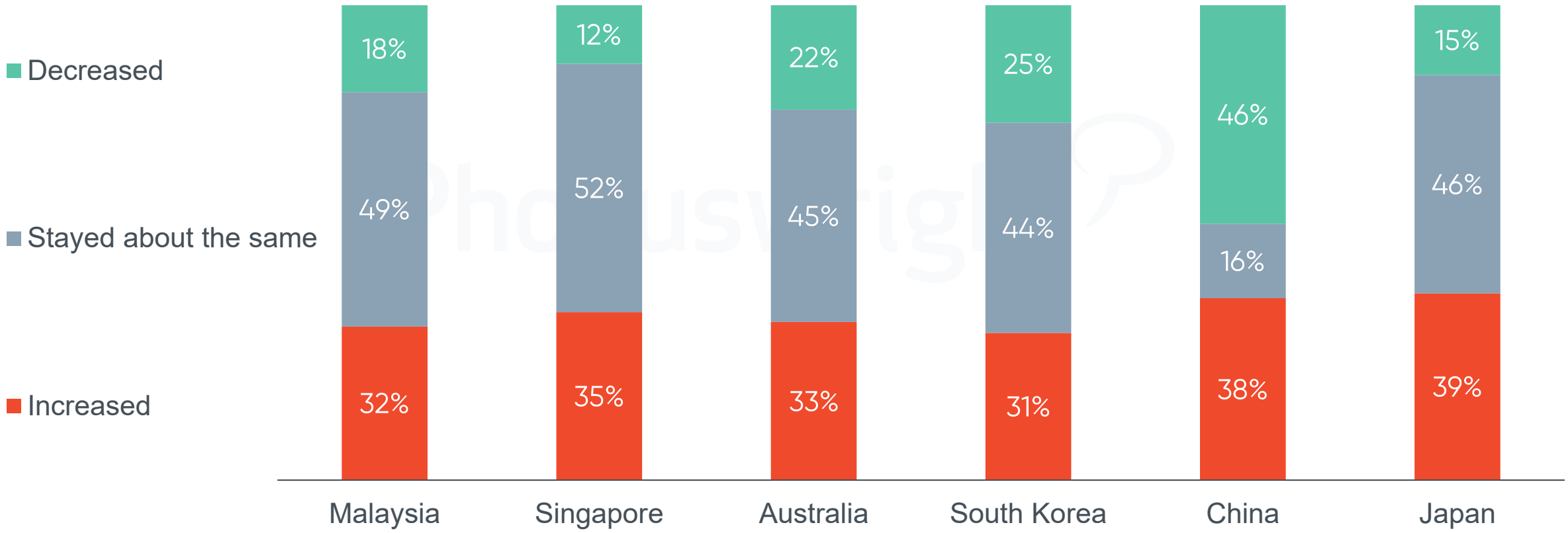


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Base: Travelers who have anxiety (Malaysia N=268; Singapore N=258; Australia N=238; South Korea N=201; China N=282; Japan N=248)
Source: *Global Booking Anxiety Study 2026*

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Booking anxiety has stayed the same for most travelers in APAC while decreasing significantly for those from China.

Change in Booking Anxiety Compared to 2-3 Years Ago



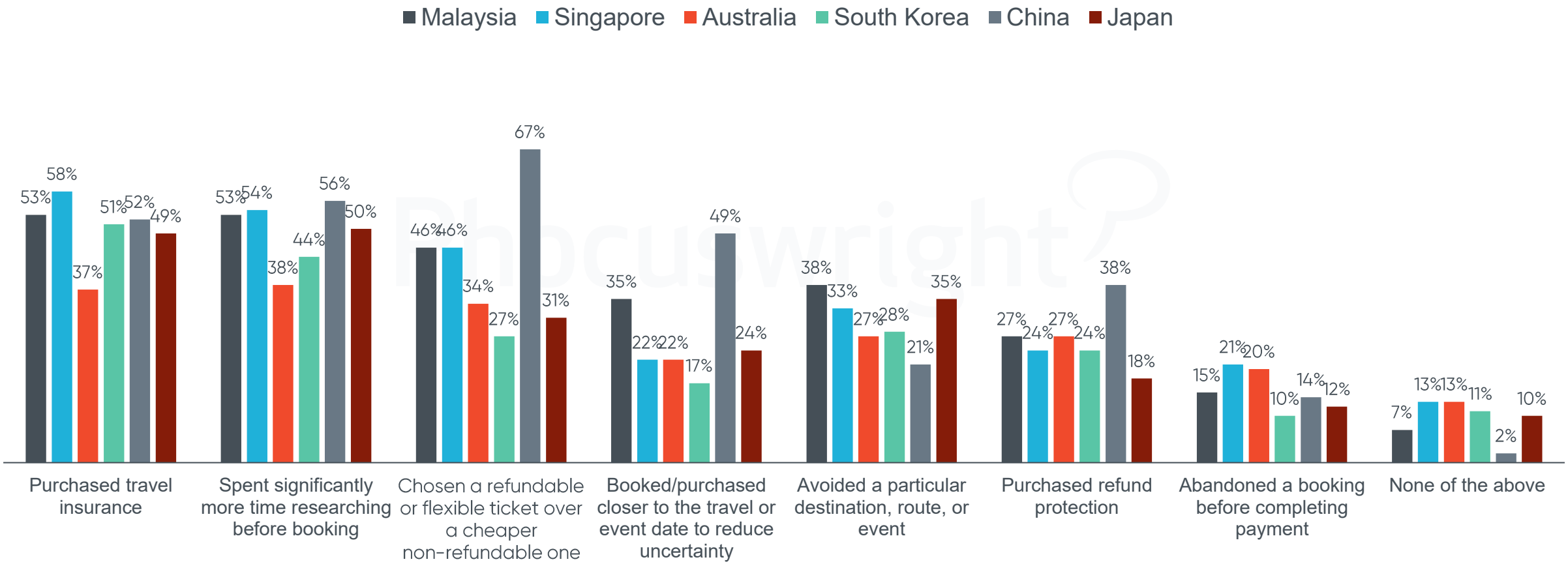
Question: Compared to 2–3 years ago, has your overall anxiety about booking international travel …?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Anxiety changes how most travelers book.

Among those who acted, purchasing travel insurance and spending more time on research topped the list.

Actions Taken as a Result of Booking Anxiety



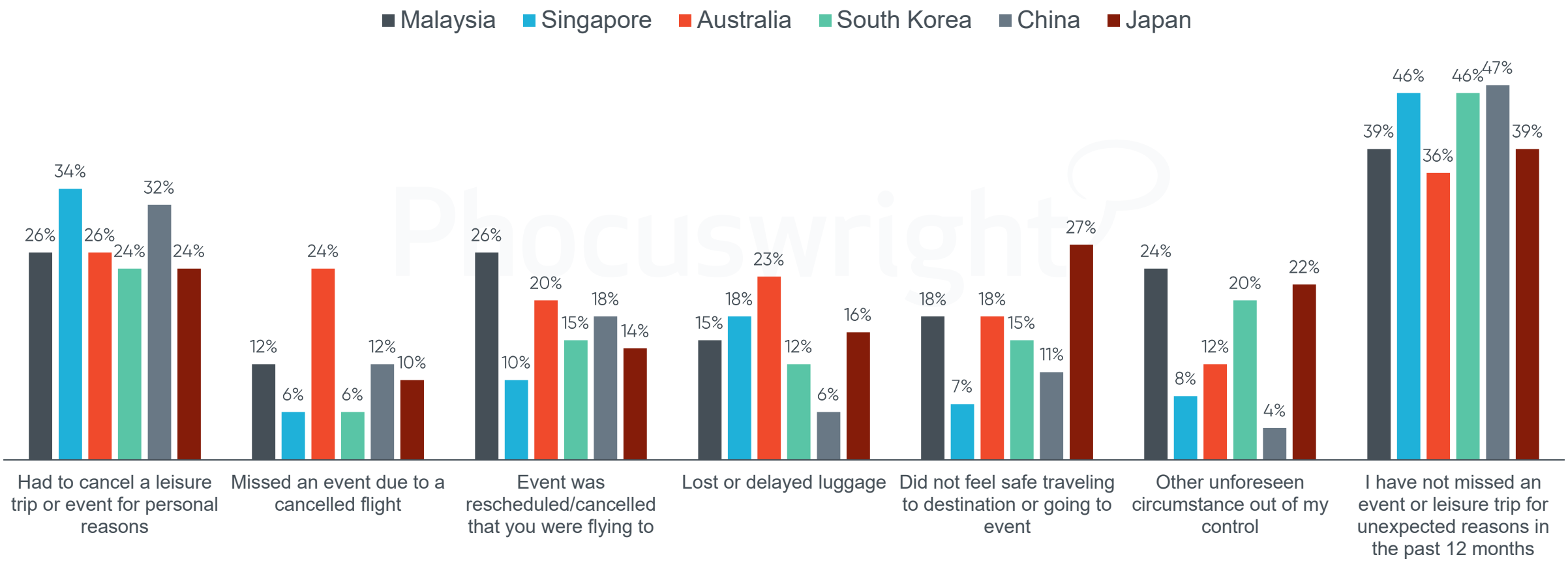
Question: Has anxiety or uncertainty ever caused you to do any of the following? Select all that apply.
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Trip and event disruptions help explain anxiety.

Less than half of travelers in each market traveled or experienced an event disruption-free.

Travel and Event Disruptions Experienced in the Past 12 Months

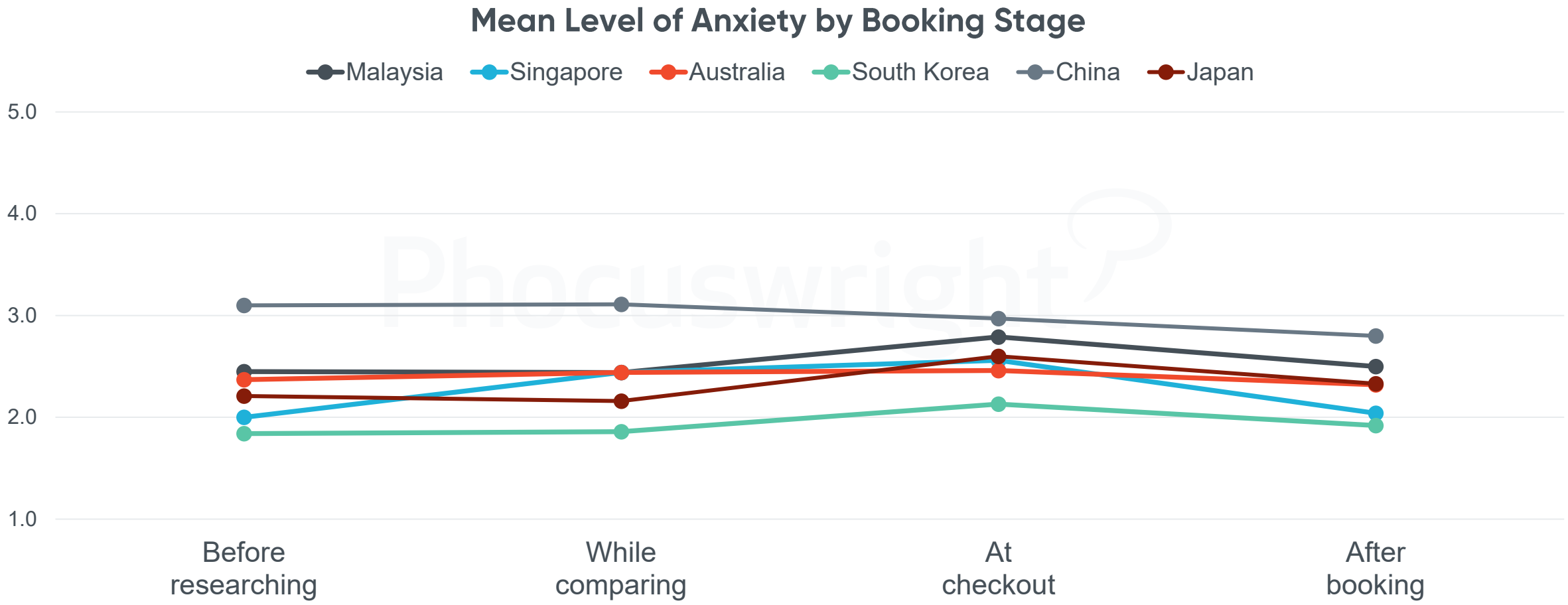


Question: In the past 12 months, have you experienced any of the following? Select all that apply.
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Booking anxiety is generally highest at checkout.

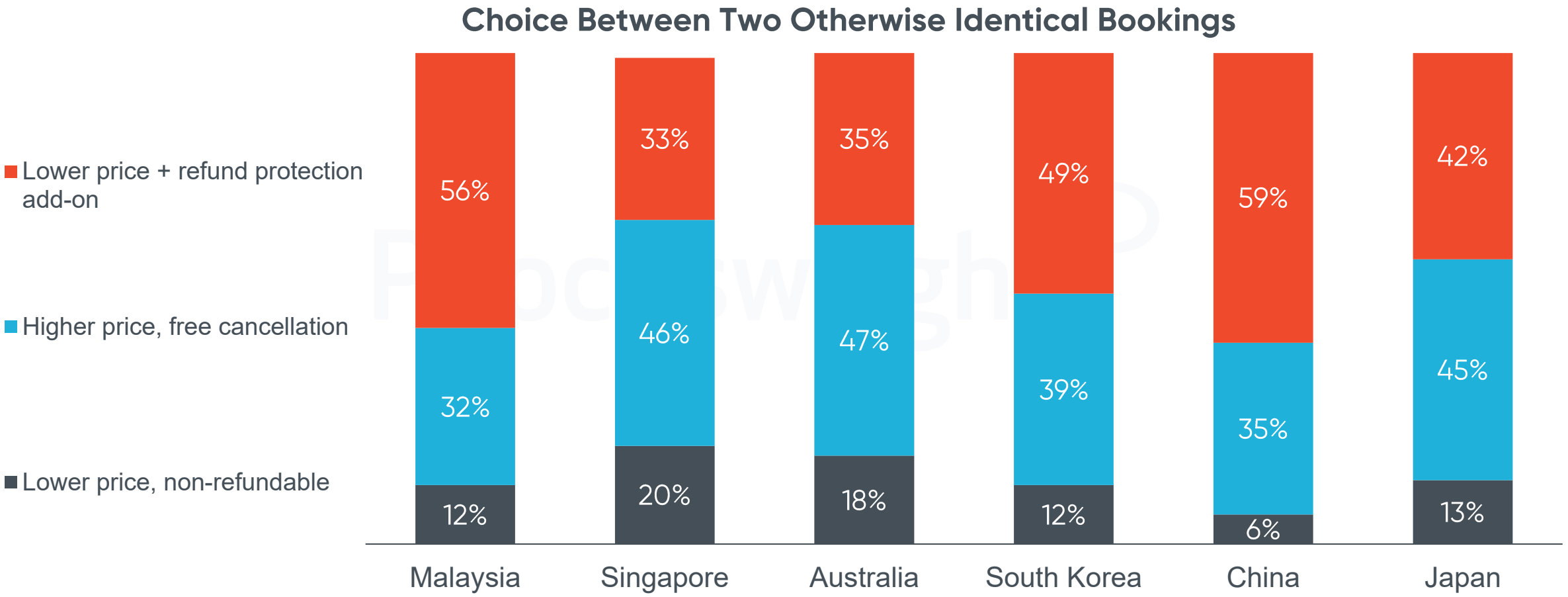
Overall, Chinese travelers express higher levels of anxiety than others in Asia Pacific.



Question: When booking international trips or purchasing event tickets, for each stage of the process please rate how anxious you feel.
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Most travelers would choose a lower-priced option with an optional refund protection add-on at a low extra cost.

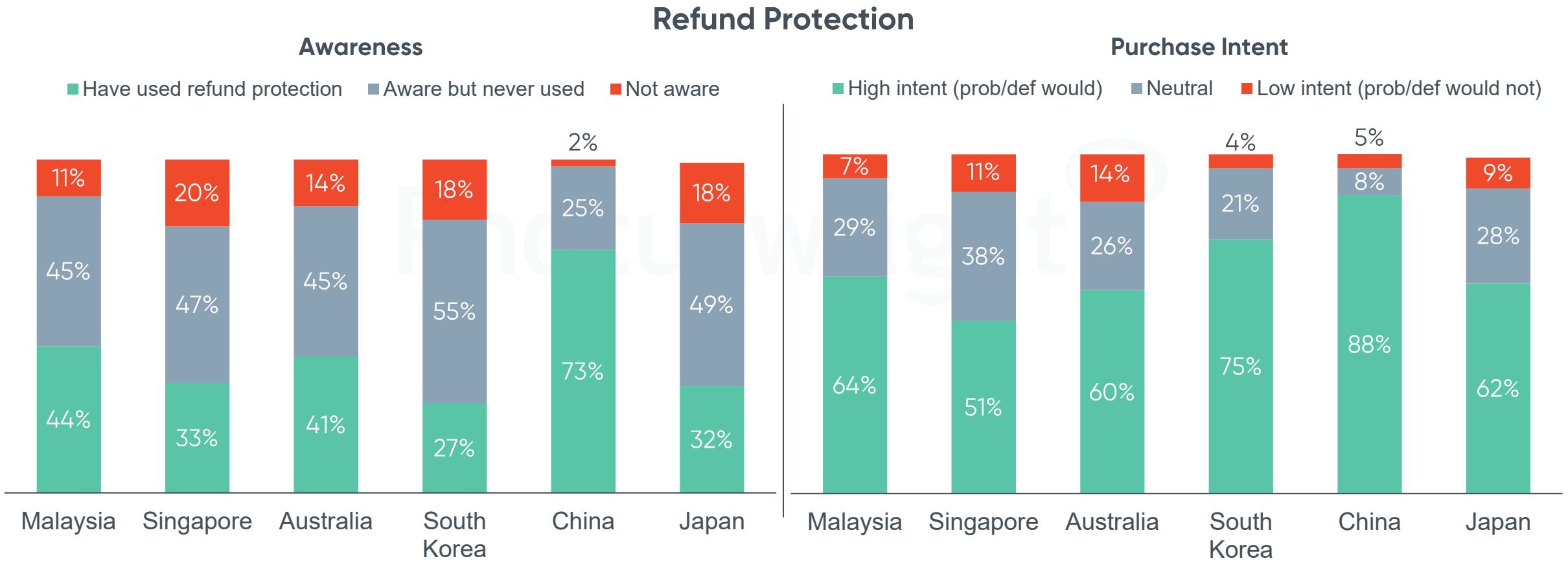


Question: Imagine you are choosing between two otherwise identical bookings (e.g., flight, hotel or event tickets). Which would you prefer?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Refund protection has high levels of awareness and purchase intent among travelers.

Ninety eight percent of Chinese travelers are aware of refund protection products, while 88% show high purchase intent.

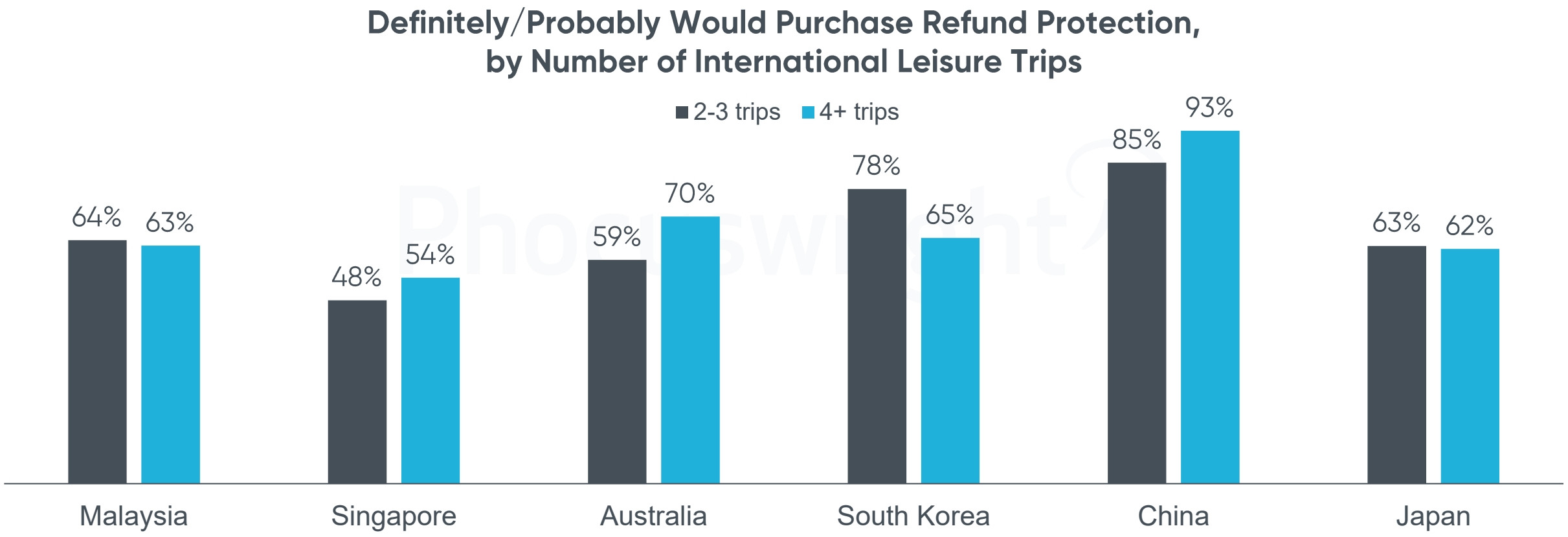


Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?; If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Interest in refund protection is generally high across markets, regardless of travel frequency.

Less-frequent Chinese travelers are most interested in refund protection

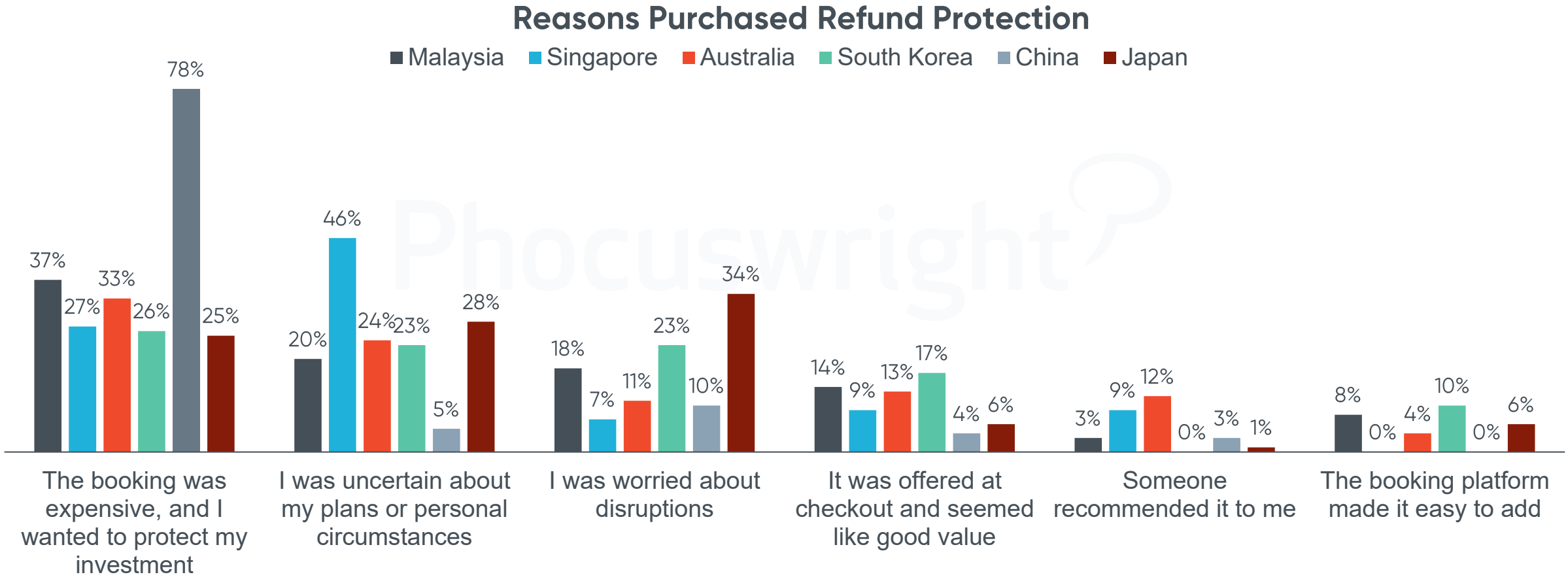


Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Expensive trips and uncertainty about personal situation are the top reasons for purchasing refund protection.

Chinese travelers are significantly more likely than others to purchase the option to protect costly bookings.



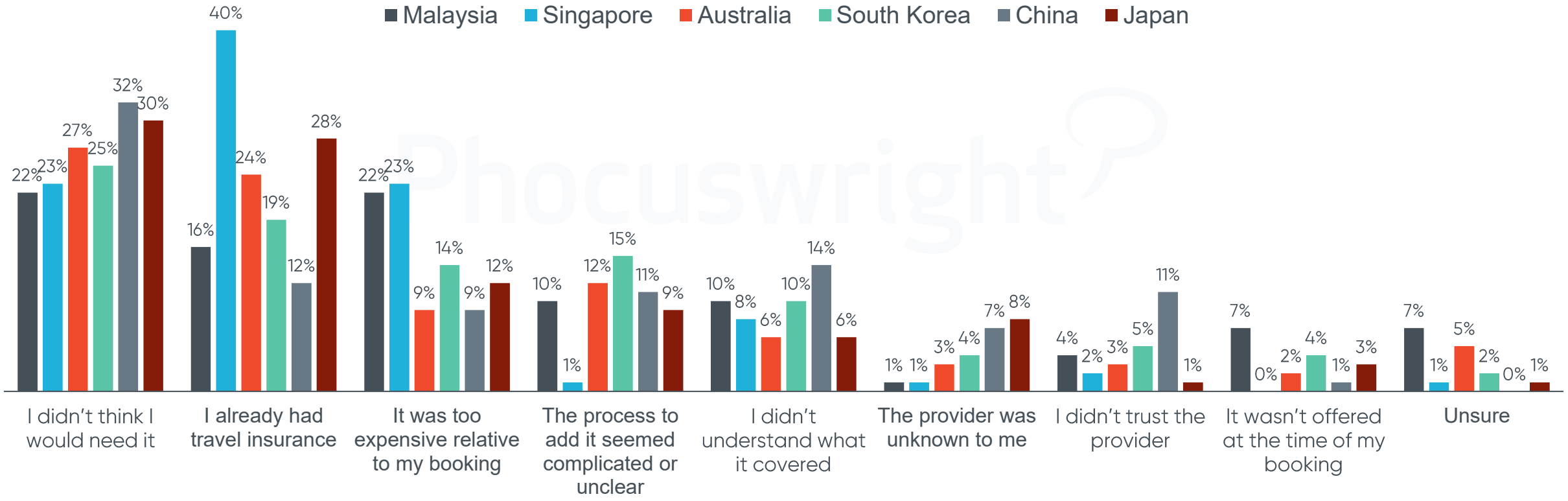
Question: What was the main reason you purchased refund protection?
Base: Purchased refund protection (Malaysia N=133; Singapore N=99; Australia N=123; South Korea N=81; China N=219; Japan N=97)
Source: *Global Booking Anxiety Study 2026*

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Perceived need and existing insurance are the main barriers to purchasing refund protection.

Education is needed for consumers to differentiate travel insurance and refund protection.

Reasons Did Not Purchase Refund Protection



Question: What was the main reason you chose not to purchase refund protection?
Base: Did not purchase refund protection (Malaysia N=134; Singapore N=142; Australia N=136; South Korea N=165; China N=74; Japan N=148)
Source: *Global Booking Anxiety Study 2026*

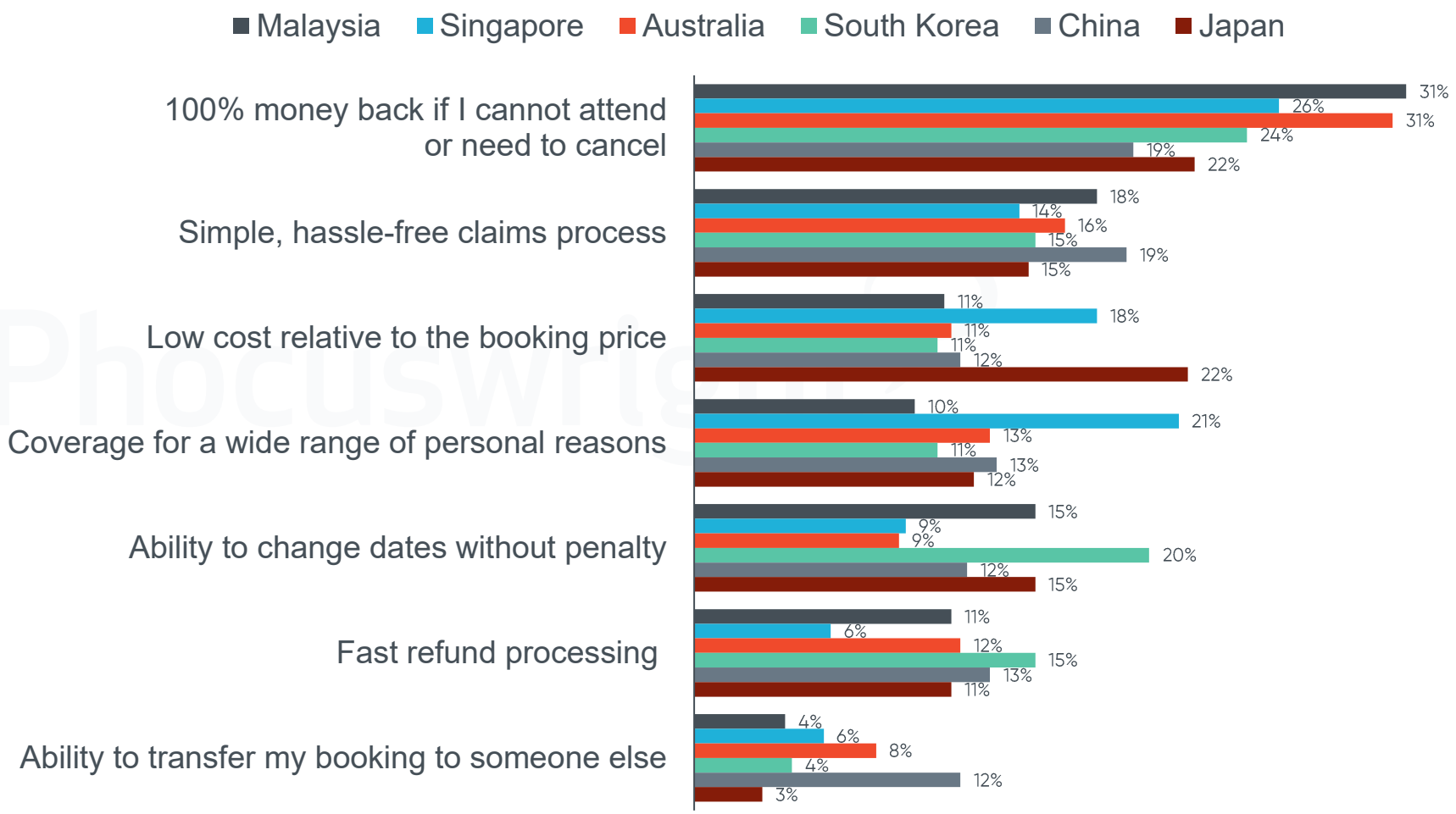
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Money back is the most appealing feature of refund protection.

The ability to change dates without penalty is most motivating to South Korea travelers.

Meanwhile, Japan travelers prefer low cost relative to the booking price, as well as hassle-free claims process.

Refund Protection Purchase Drivers, Ranked 1st



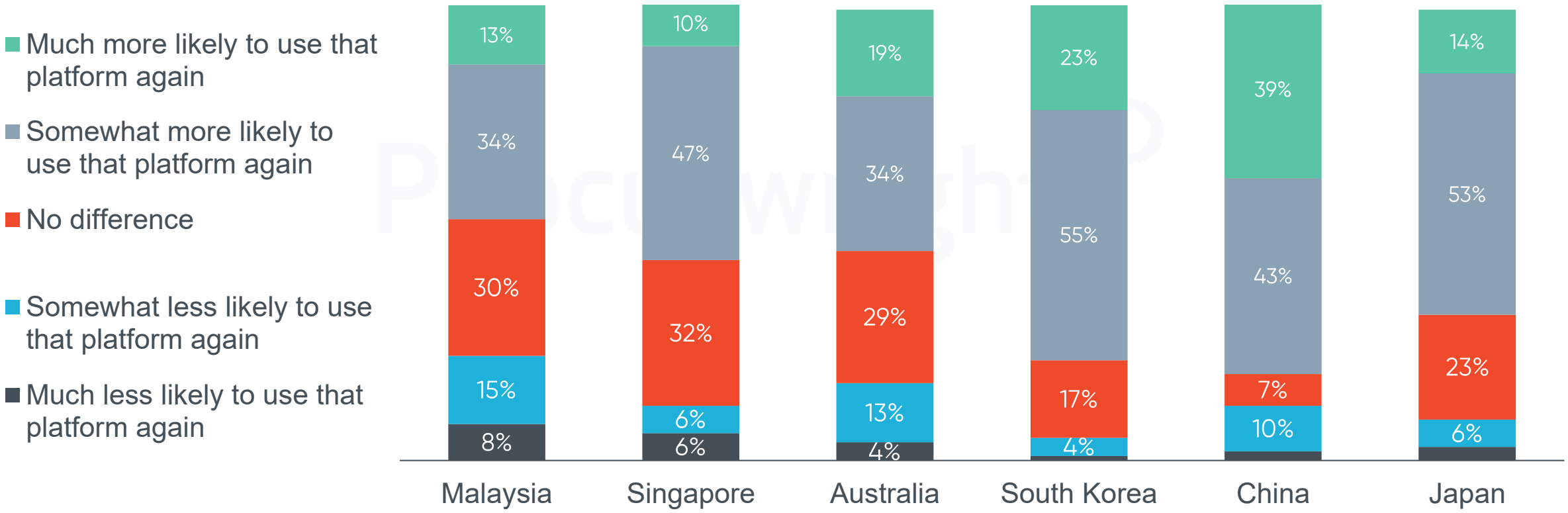
Question: Which of the following features would make you most likely to purchase refund protection? Rank your top 3 in order of importance where 1 is the most important.
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Refund protection has the strongest platform repeat use impact in South Korea and China

Those from Australia, Malaysia and Singapore are more likely to say it would make no difference.

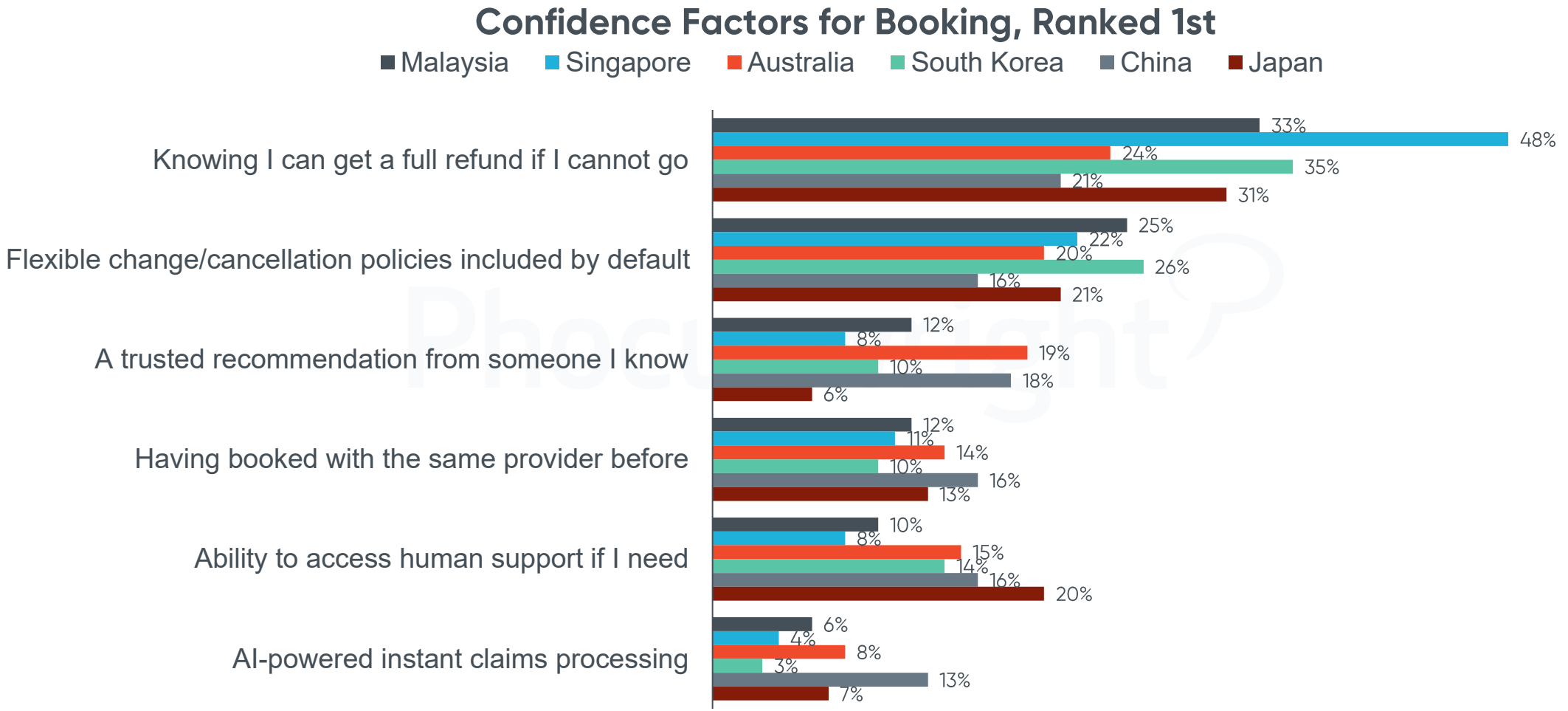
Refund Protection Impact on Future Platform Use



Question: If a booking platform consistently offered refund protection as a standard option, how would that affect your likelihood of using that platform again for future bookings?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Travelers expressed the most confidence when refunds are available.



Question: Which of the following would most increase your confidence to book an international trip or purchase event tickets today?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

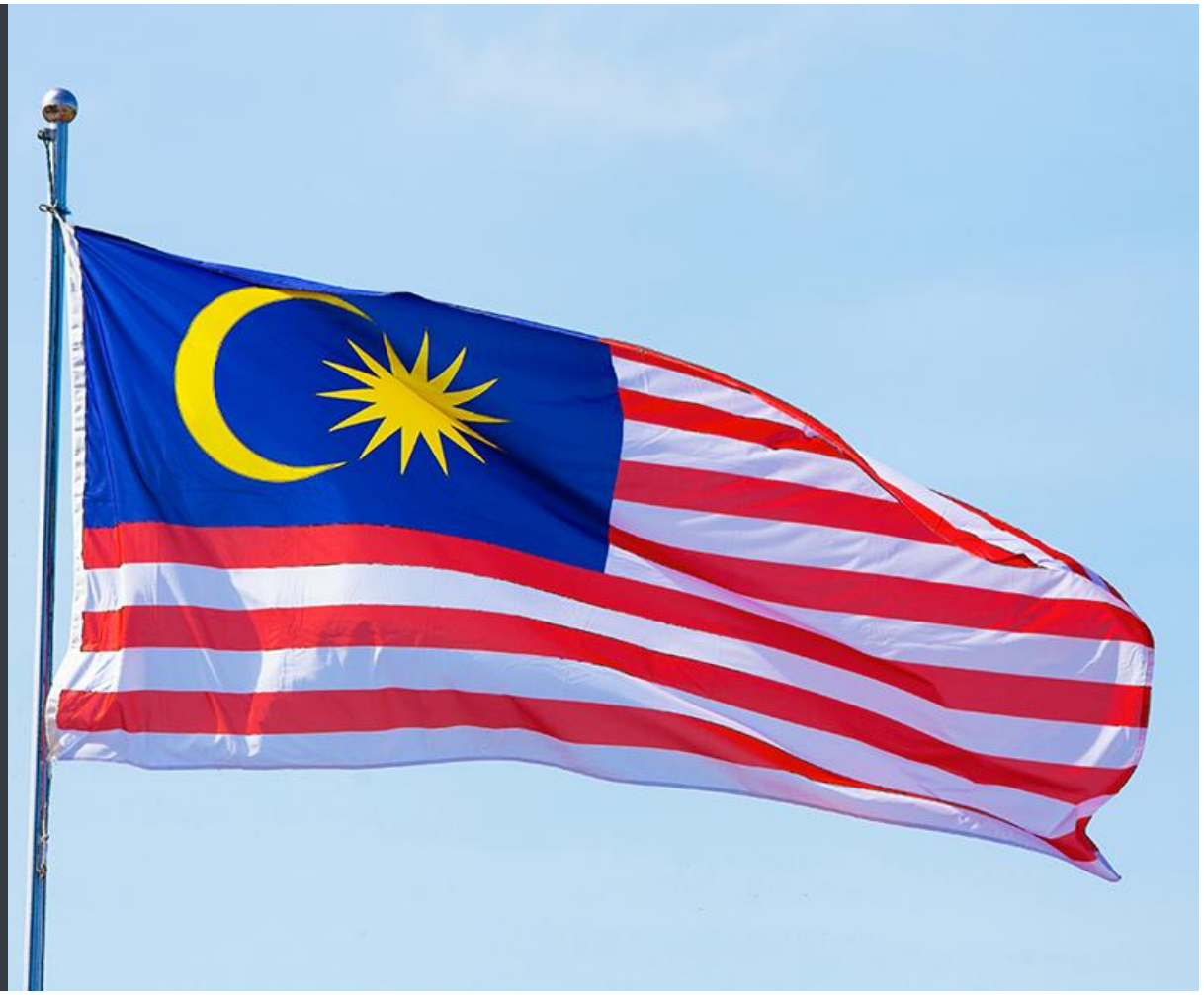
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Country-Level Differences

Malaysia

- Malaysians are more anxious about booking international trips than other APAC travelers, with 62% feeling at least "moderately anxious" versus 38% overall.
- Almost nine in 10 Malaysians have heard of or used refund protection.
- Around two thirds say they probably/ definitely would buy refund protection on their next trip.



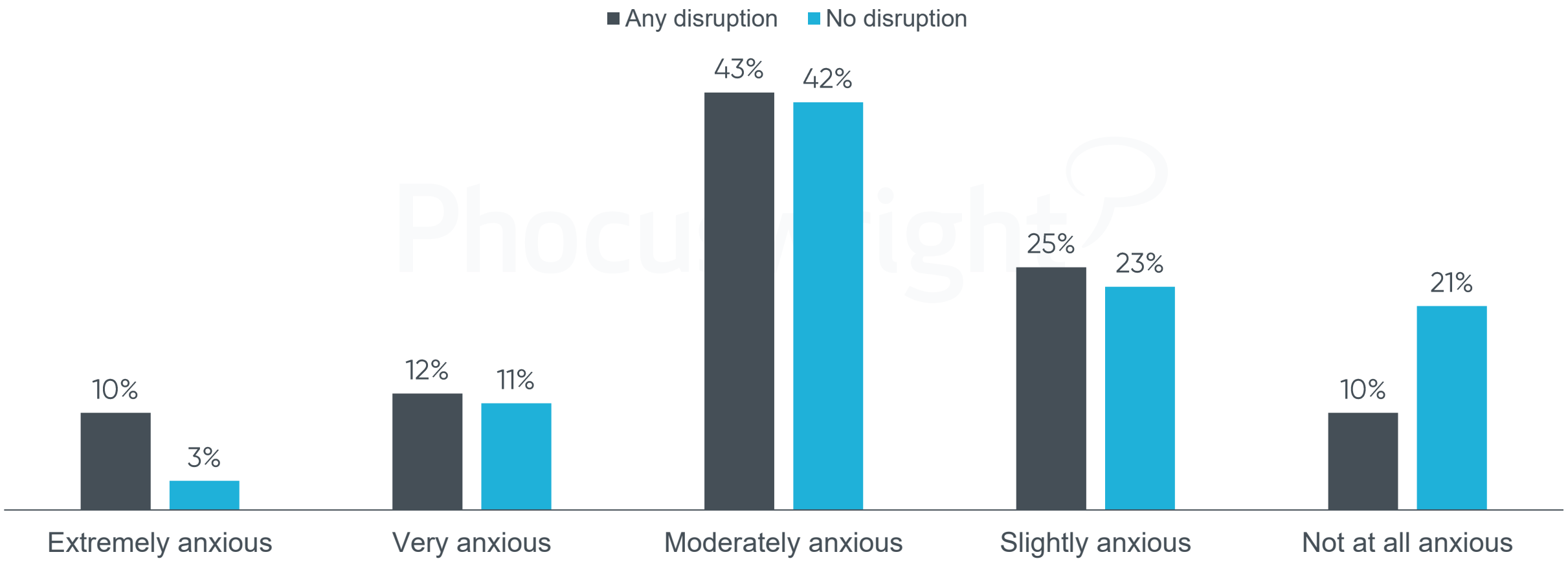
"malayasian-flag1" by Prachatai, CC BY-NC-ND 2.0

Source: *Global Booking Anxiety Study 2026*

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Previous disruption experiences among Malaysian travelers trigger higher travel booking anxiety.

Malaysia Booking Travel Anxiety, by Disruption Experience

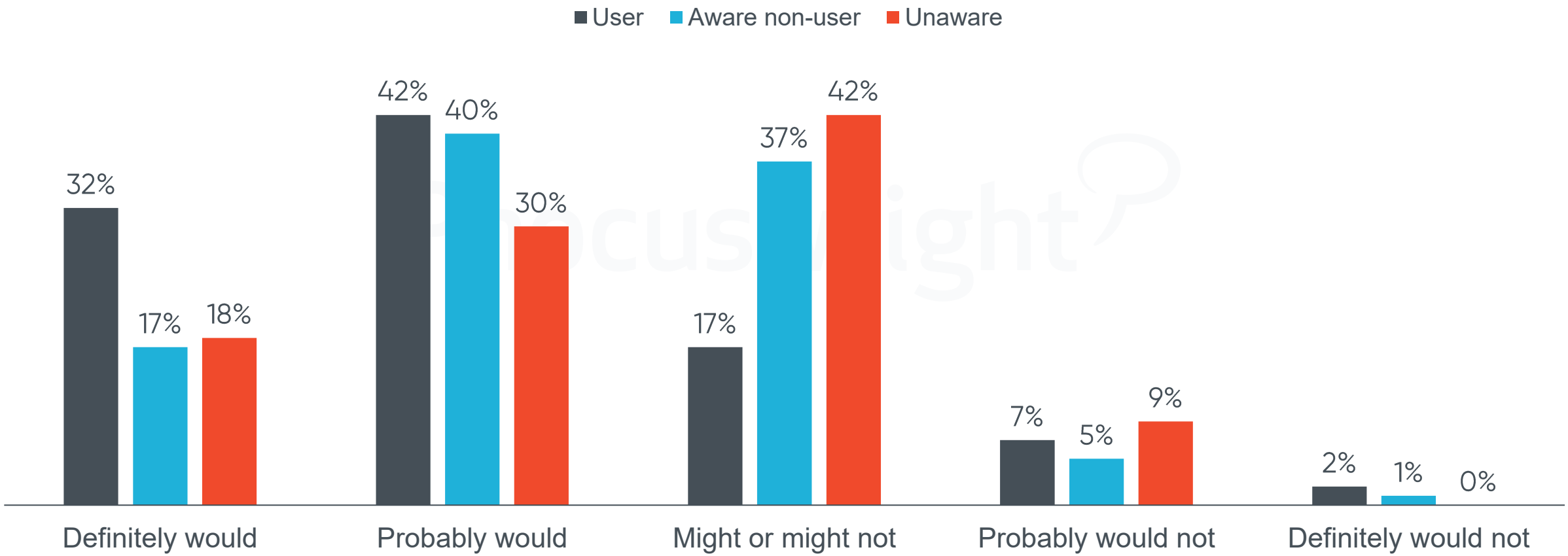


Question: When you think about booking an international trip, how anxious do you generally feel?
Base: Total respondents (Malaysia N=300)
Source: *Global Booking Anxiety Study 2026*

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Past Malaysian users of refund protection are most likely to purchase it again with their next booking.

Malaysia Refund Protection Purchase Intent, by Past Usage



Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (Malaysia N=300)
Source: *Global Booking Anxiety Study 2026*

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Travelers in APAC are most likely to add protection to lower-priced purchases.

Nearly half of Malaysia respondents prefer the lowest price band, with about a quarter at the next band.

Malaysia, Per Person Event/Ticket Price Would Add Refund Protection, in Local Currency



Question: Thinking about different options (international trips or event tickets) refund protection can be offered for, at what per person price (excluding taxes and fees) would you add refund protection to your purchase or booking? (Local currency)
Base: Respondents who would purchase refund protection (Malaysia N=296)
Source: *Global Booking Anxiety Study 2026*

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Singapore

- More than eight in 10 Singaporeans feel at least slightly anxious when booking international trips.
- A majority are aware of refund protection, with mid-aged, higher-income groups most likely to have used it before.
- Losing money is a key motivator for Singapore respondents, with travelers most confident in booking tickets that give them a full refund if they cannot go.

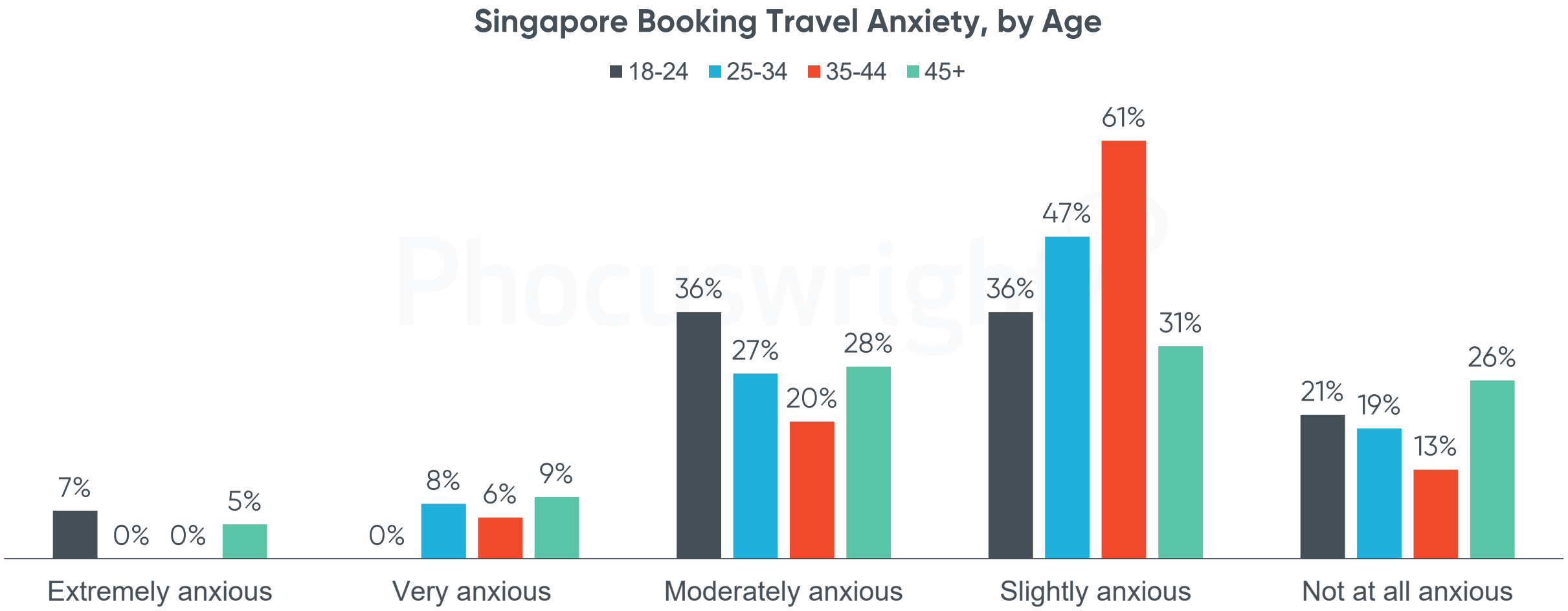


"Singapore Flag" by Vince WYP, CC BY-NC-ND 2.0

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Singaporeans aged 35-44 are most likely to report only slight travel booking anxiety.

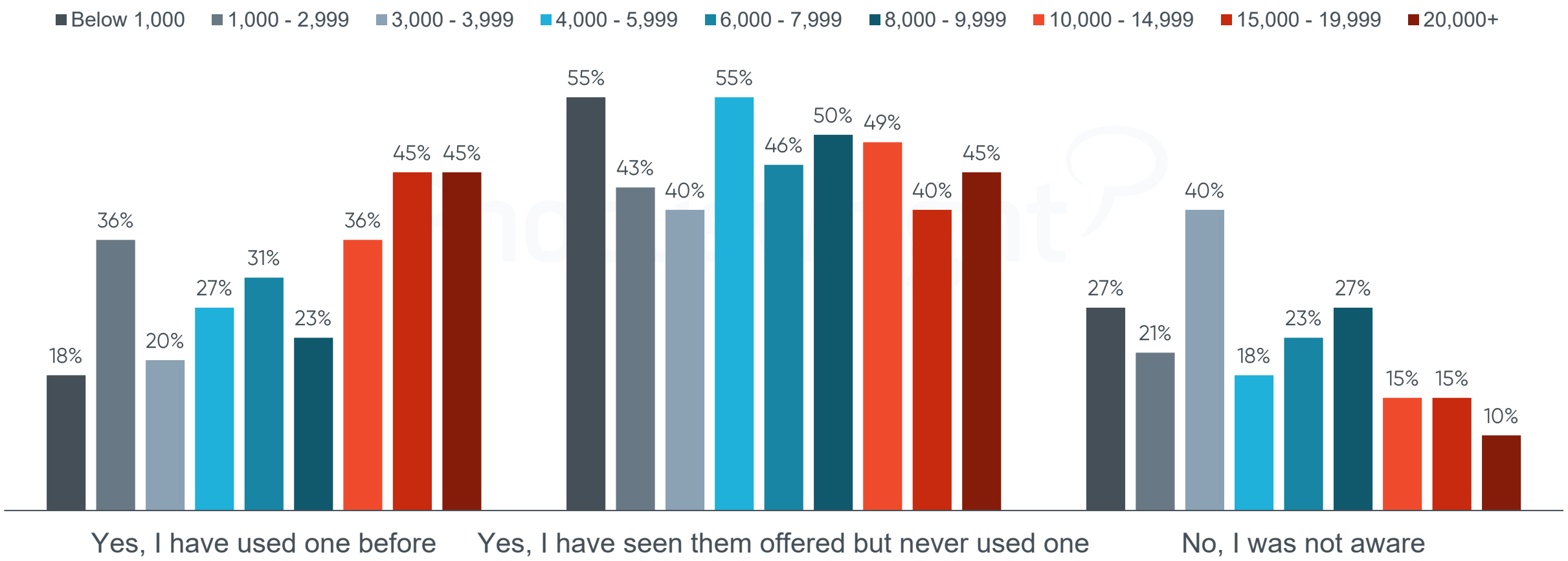


Question: When you think about booking an international trip, how anxious do you generally feel?
Base: Total respondents (Singapore N=300)
Source: *Global Booking Anxiety Study 2026*

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Singaporean travelers with higher household income are more likely to have used booking refund protection before.

Singapore Refund Protection Awareness, by Annual Household Income (SGD)



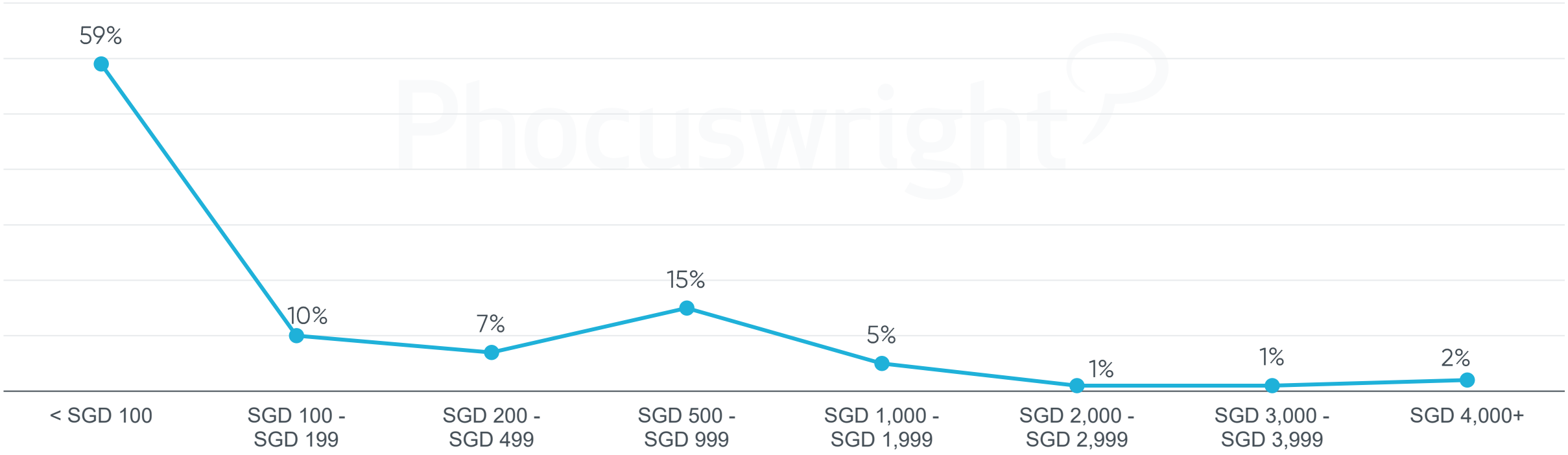
Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?
Base: Total respondents (Singapore N=300)
Source: *Global Booking Anxiety Study 2026*

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Travelers in APAC are most likely to add protection to lower-priced purchases.

Singapore travelers are overwhelmingly keen on low-priced refund protection.

Singapore, Per Person Event/Ticket Price Would Add Refund Protection, in Local Currency



Question: Thinking about different options (international trips or event tickets) refund protection can be offered for, at what per person price (excluding taxes and fees) would you add refund protection to your purchase or booking? (Local currency)
Base: Respondents who would purchase refund protection (Singapore N=298)
Source: *Global Booking Anxiety Study 2026*

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Australia

- Around four in 10 have used refund protection before.
- Older travelers feel less anxiety when booking international trips and are also least aware about refund protection products.

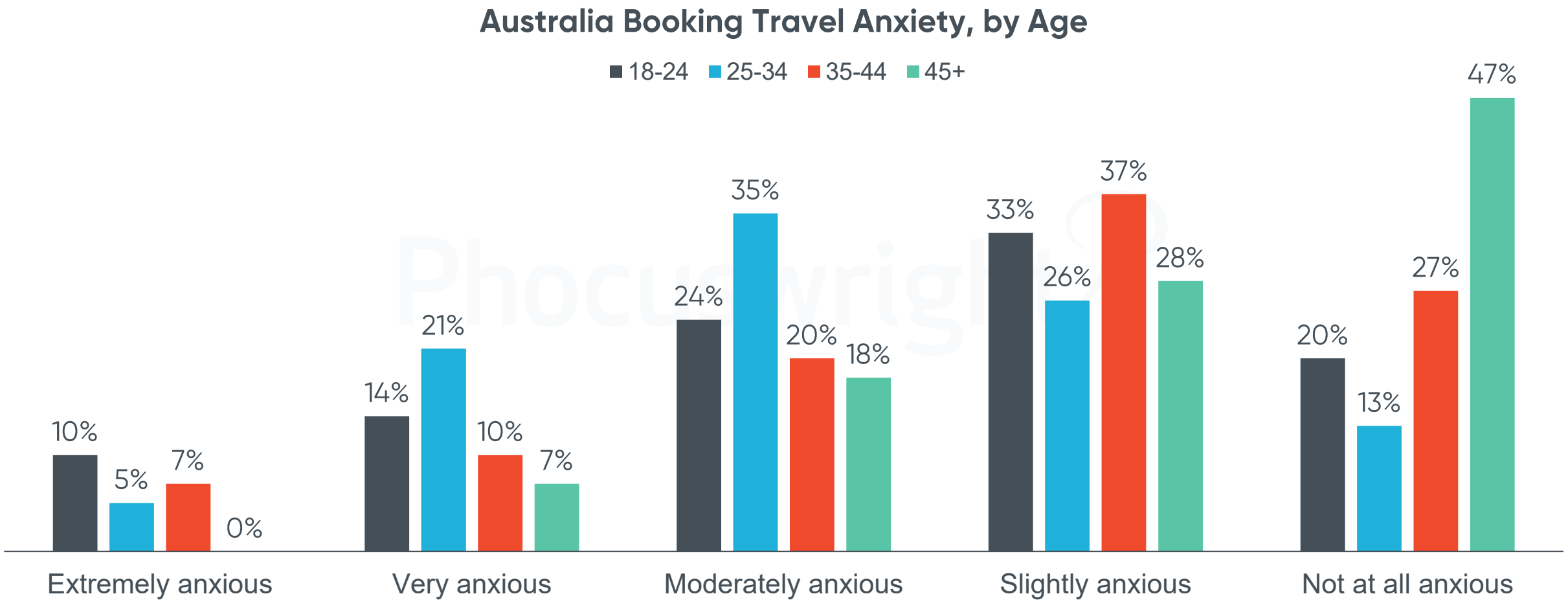


"Australian flag" by Neil Willsey, CC BY-SA 2.0

Source: *Global Booking Anxiety Study 2026*

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Older Australian travelers exhibit the least amount of travel booking anxiety.



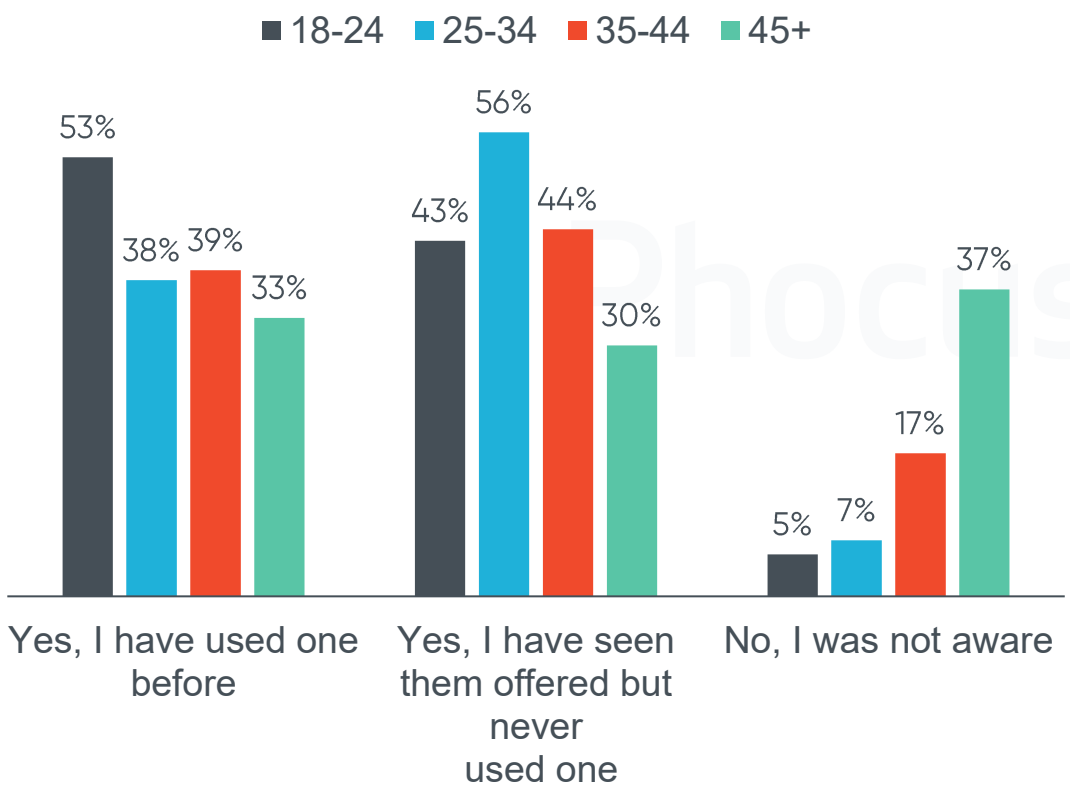
Question: When you think about booking an international trip, how anxious do you generally feel?
Base: Total respondents (Australia N=300)
Source: *Global Booking Anxiety Study 2026*

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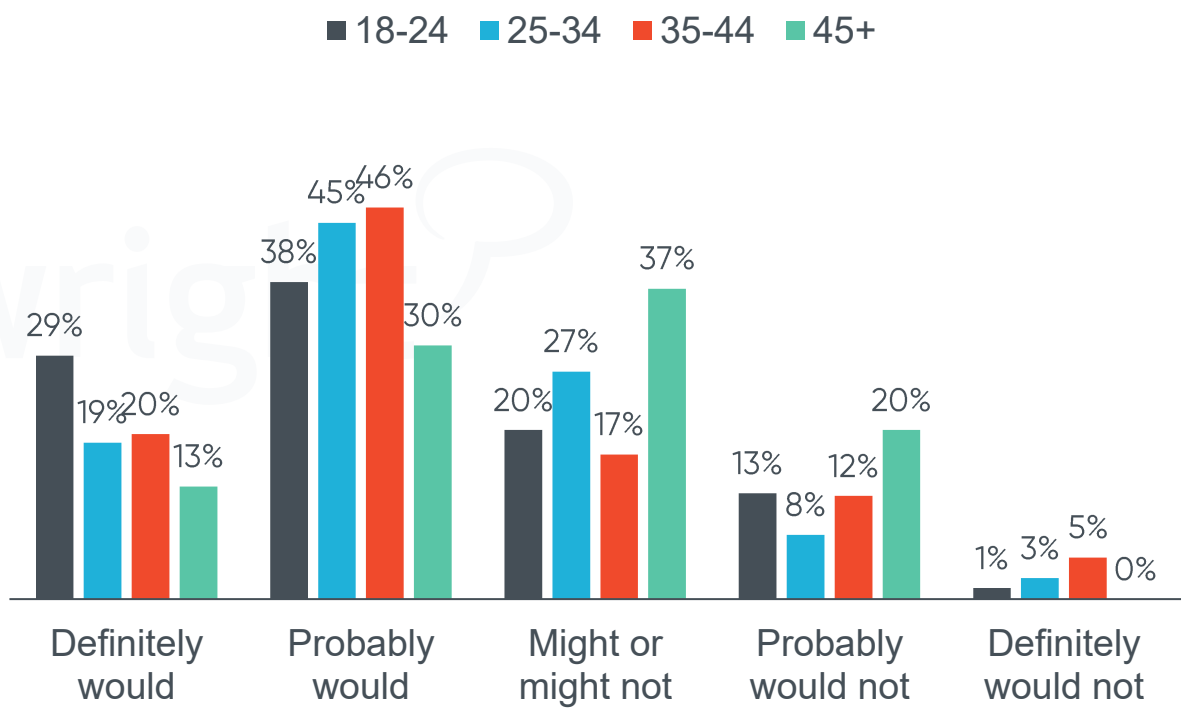
Younger Australian travelers are more engaged with refund protection with higher awareness, usage and intent.

Refund Protection

Australia Awareness, by Age



Australia Purchase Intent, by Age



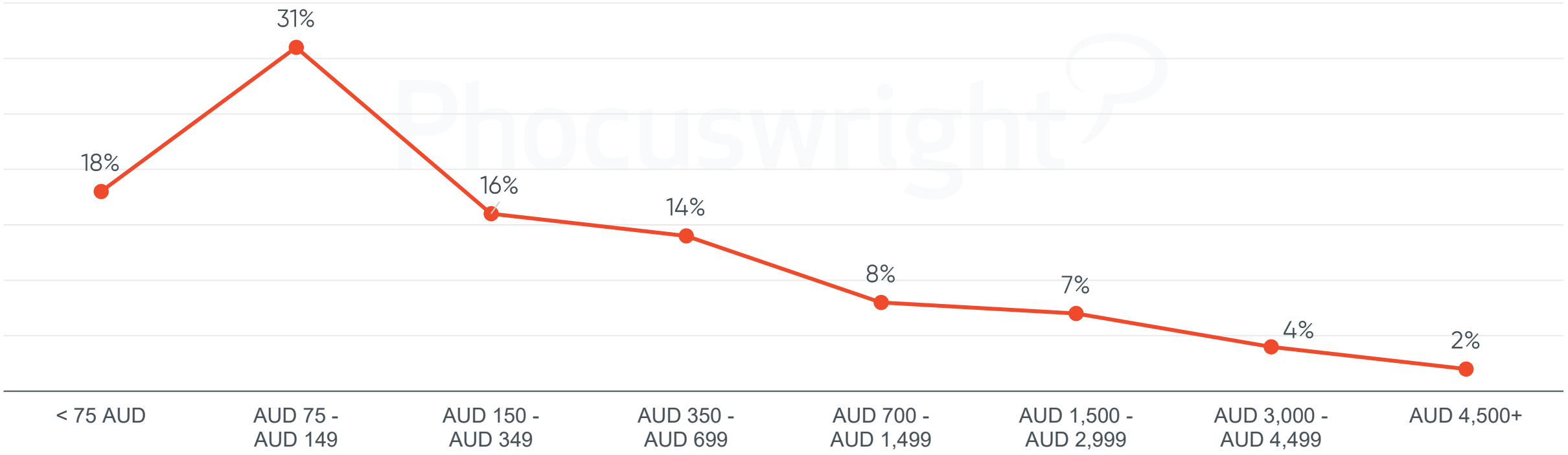
Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?; If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (Australia N=300)
Source: *Global Booking Anxiety Study 2026*

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Travelers in APAC are most likely to add protection to lower-priced purchases.

Australia travelers' preference is still in the low-tiered prices but is more widespread.

Australia, Per Person Event/Ticket Price Would Add Refund Protection, in Local Currency



Question: Thinking about different options (international trips or event tickets) refund protection can be offered for, at what per person price (excluding taxes and fees) would you add refund protection to your purchase or booking? (Local currency)
Base: Respondents who would purchase refund protection (Australia N=294)
Source: *Global Booking Anxiety Study 2026*

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South Korea

- South Korea's overall anxiety is low, with four in 10 saying they are not at all anxious about booking international travel.
- Awareness of refund protection is high, but most have never used it before.
- South Korean travelers are generally open to purchasing refund protection with their next booking.

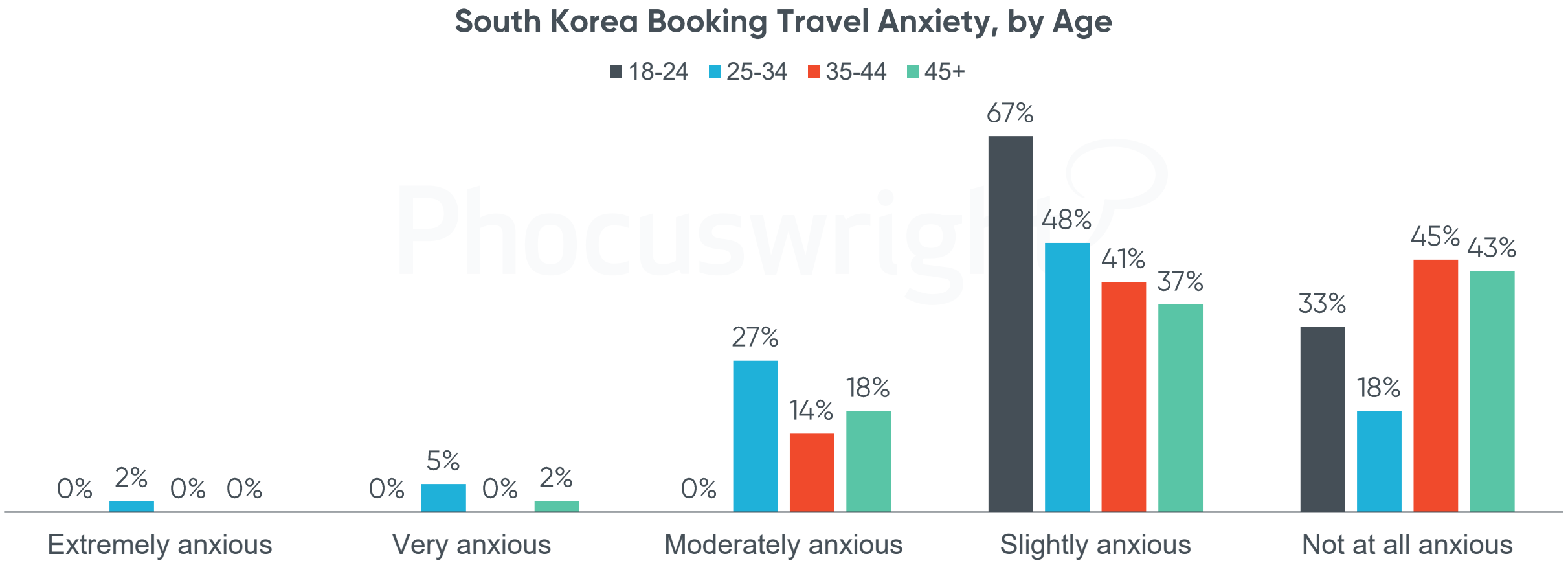


"South Korea Flag" by Global Panorama, CC BY-SA 2.0

Source: *Global Booking Anxiety Study 2026*

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South Korean travelers exhibit low travel booking anxiety across all age groups, with younger travelers slightly more worried.

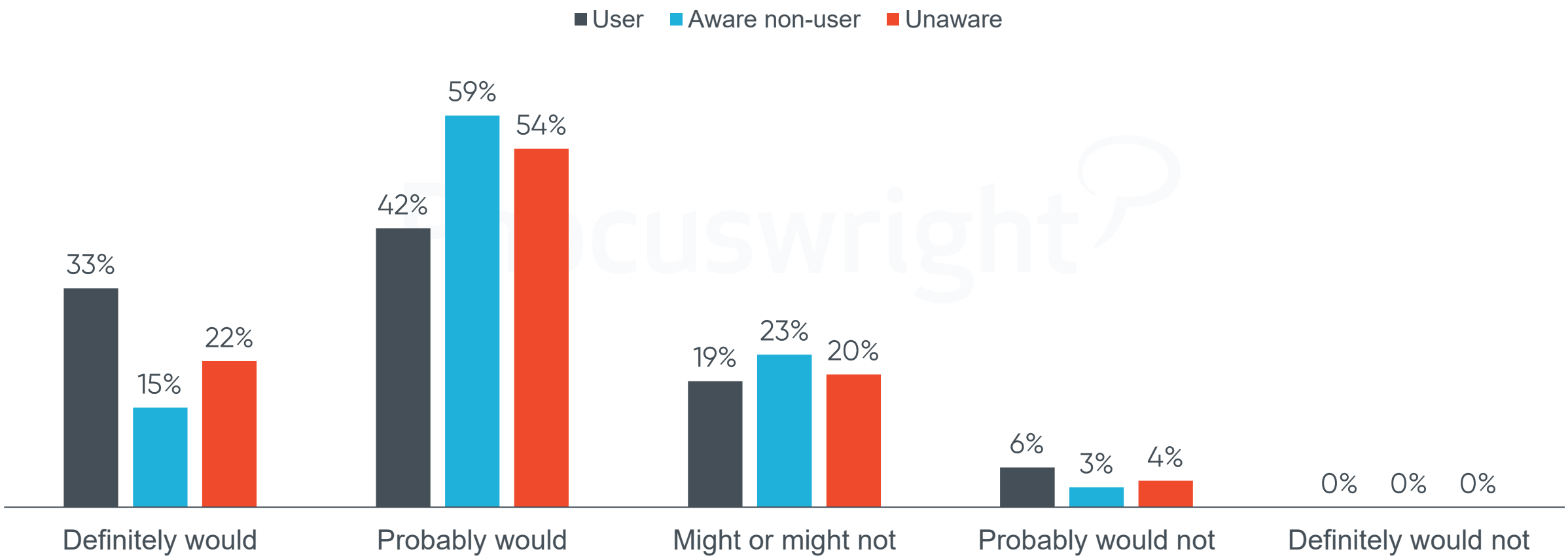


Question: When you think about booking an international trip, how anxious do you generally feel?
Base: Total respondents (South Korea N=300)
Source: *Global Booking Anxiety Study 2026*

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Past South Korean users of refund protection are likely to "definitely" purchase with next booking.

South Korea Refund Protection Purchase Intent, by Past Usage



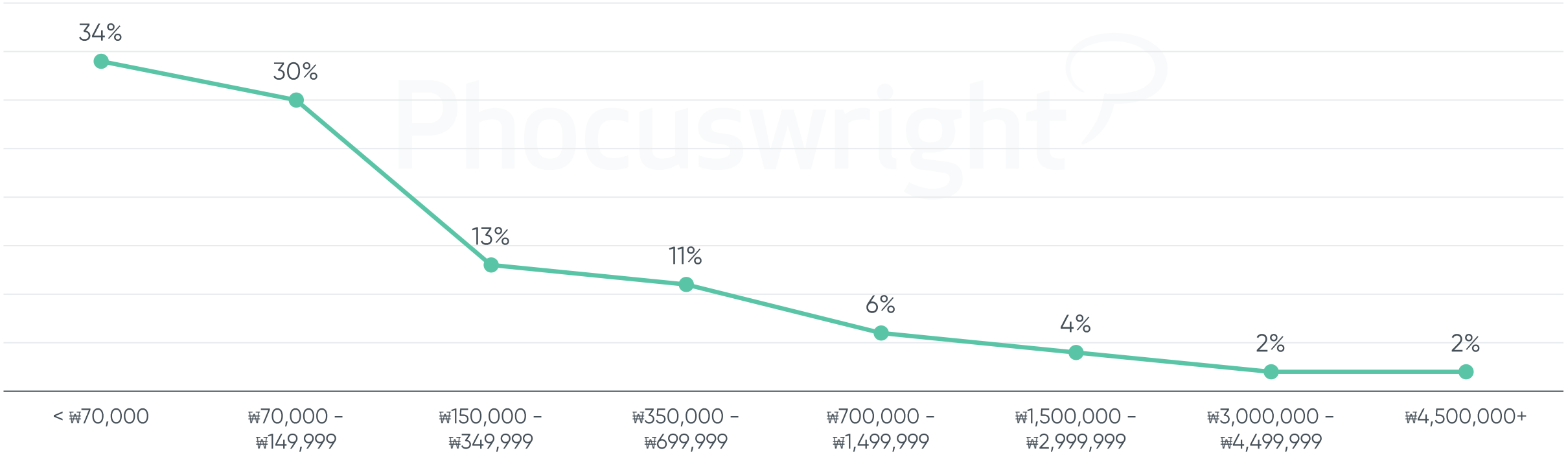
Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (South Korea N=300)
Source: *Global Booking Anxiety Study 2026*

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Travelers in APAC are most likely to add protection to lower-priced purchases.

Interest from South Korea travelers is concentrated in the two lowest price bands.

South Korea, Per Person Event/Ticket Price Would Add Refund Protection, in Local Currency

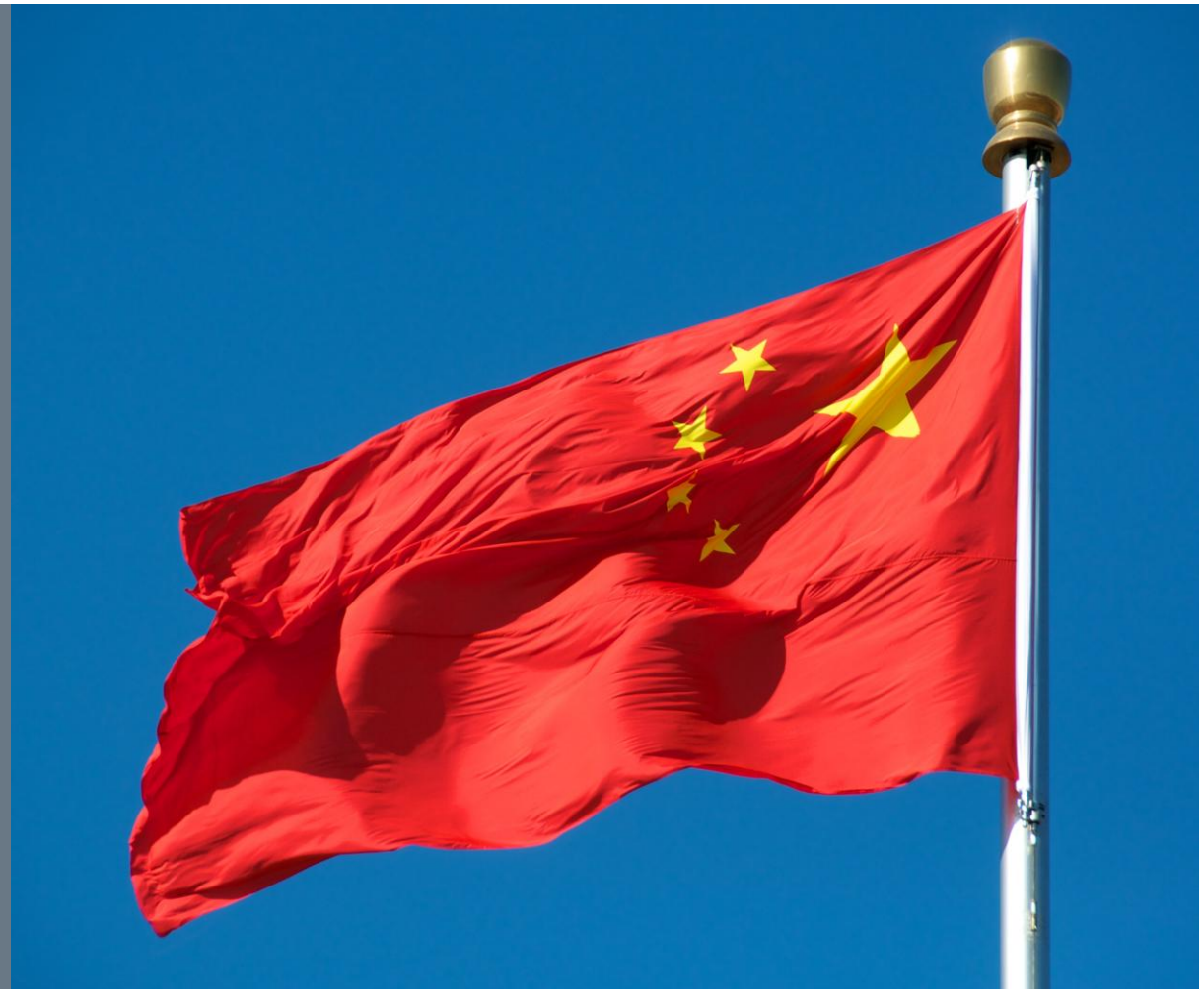


Question: Thinking about different options (international trips or event tickets) refund protection can be offered for, at what per person price (excluding taxes and fees) would you add refund protection to your purchase or booking? (Local currency)
Base: Respondents who would purchase refund protection (South Korea N=300)
Source: *Global Booking Anxiety Study 2026*

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China

- Forty-six percent of Chinese respondents said their travel booking anxiety has decreased in the past 2-3 years, the highest by far among the markets.
- Chinese travelers are very anxious about events being canceled/rescheduled.
- Nearly seven in 10 respondents purchased more flexible tickets to beat anxiety, and only 2% took no action to mitigate anxiety.
- Awareness in China is very high, with only 2% unaware of booking or refund protection products.



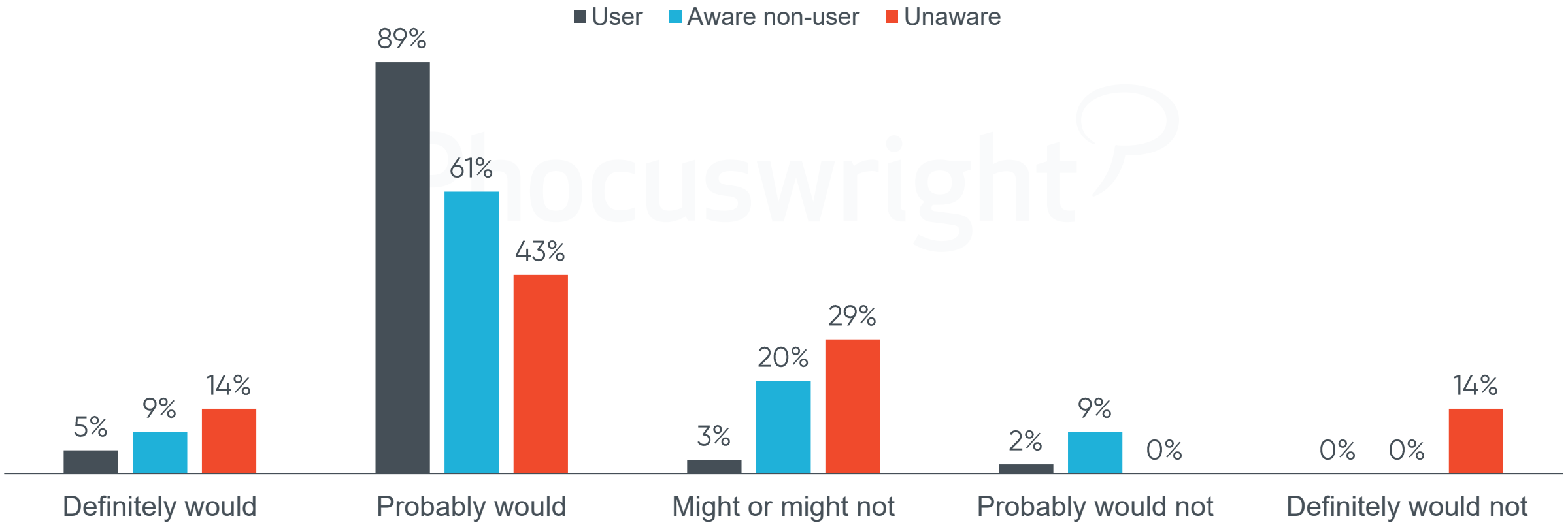
"PRC Flag" by BriYYZ, CC BY-SA 2.0

Source: *Global Booking Anxiety Study 2026*

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Chinese refund protection users are more likely to purchase again with their next booking, and are most likely in APAC to continue using it.

China Refund Protection Purchase Intent, by Past Usage

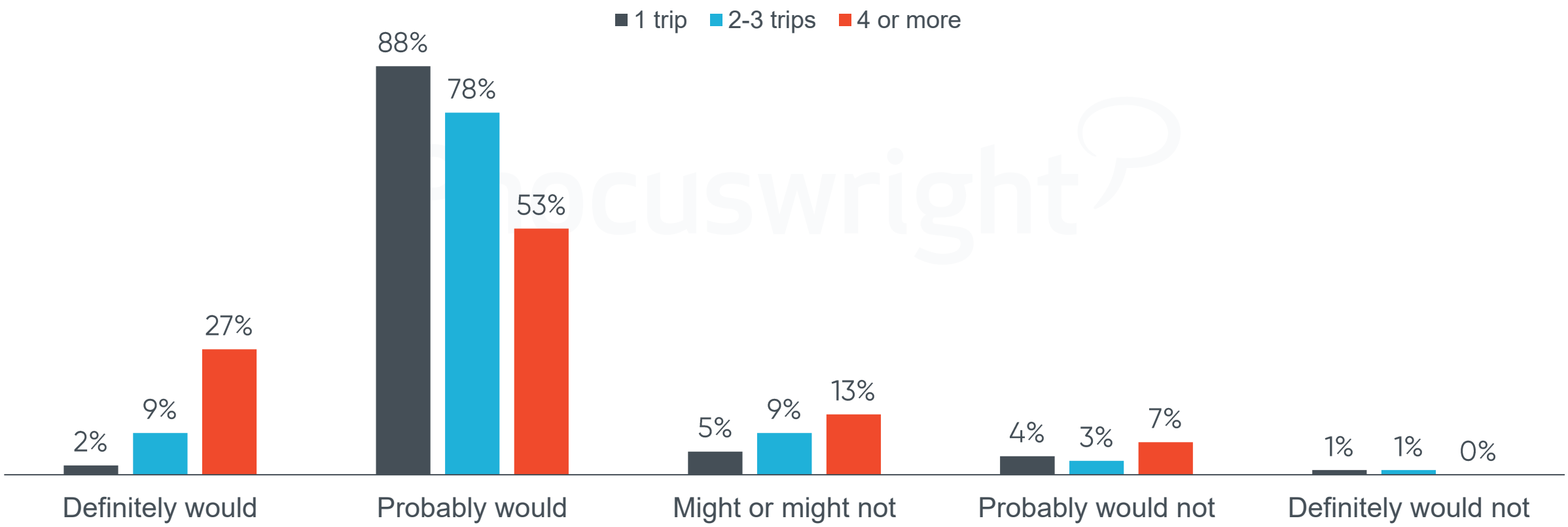


Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (China N=300)
Source: *Global Booking Anxiety Study 2026*

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Chinese travelers planning more trips, especially 4+, show a higher "definite" intent to purchase refund protection.

China Refund Protection Purchase Intent, by Planned International Trips Next 12 Months



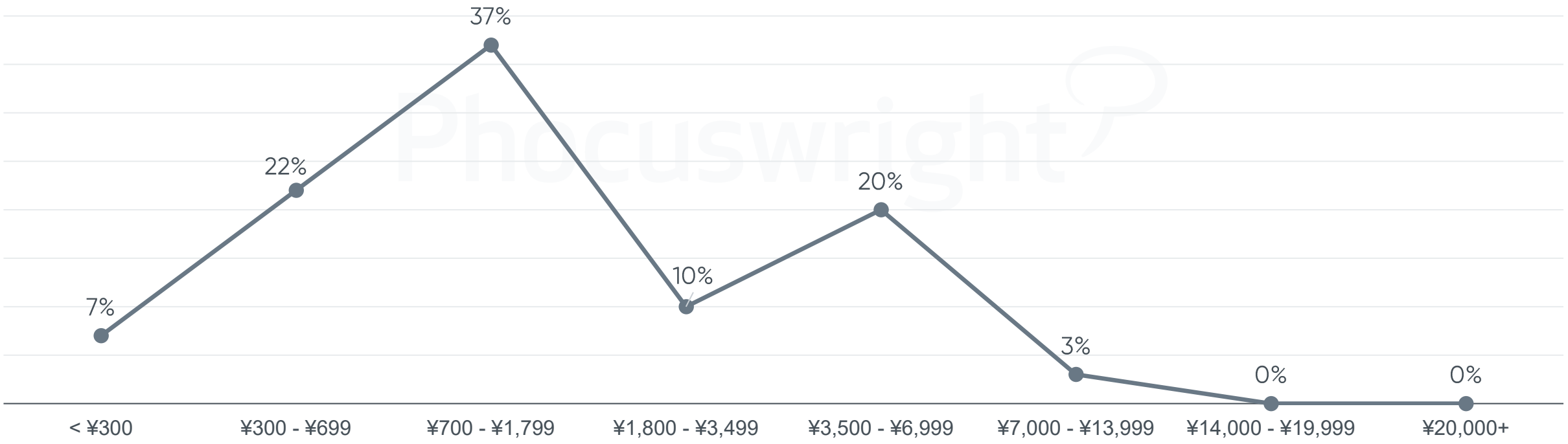
Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (China N=300)
Source: *Global Booking Anxiety Study 2026*

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Travelers in APAC are most likely to add protection to lower-priced purchases.

China is the least price sensitive, with mid-range prices also showing moderate interest.

China, Per Person Event/Ticket Price Would Add Refund Protection, in Local Currency



Question: Thinking about different options (international trips or event tickets) refund protection can be offered for, at what per person price (excluding taxes and fees) would you add refund protection to your purchase or booking? (Local currency)
Base: Respondents who would purchase refund protection (China N=298)
Source: *Global Booking Anxiety Study 2026*

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Japan

- Travel booking anxiety is common but mild, with most Japanese respondents only slightly or moderately anxious about booking international trips.
- Recent travel disruptions are associated with higher travel anxiety and higher intent to purchase refund protection.



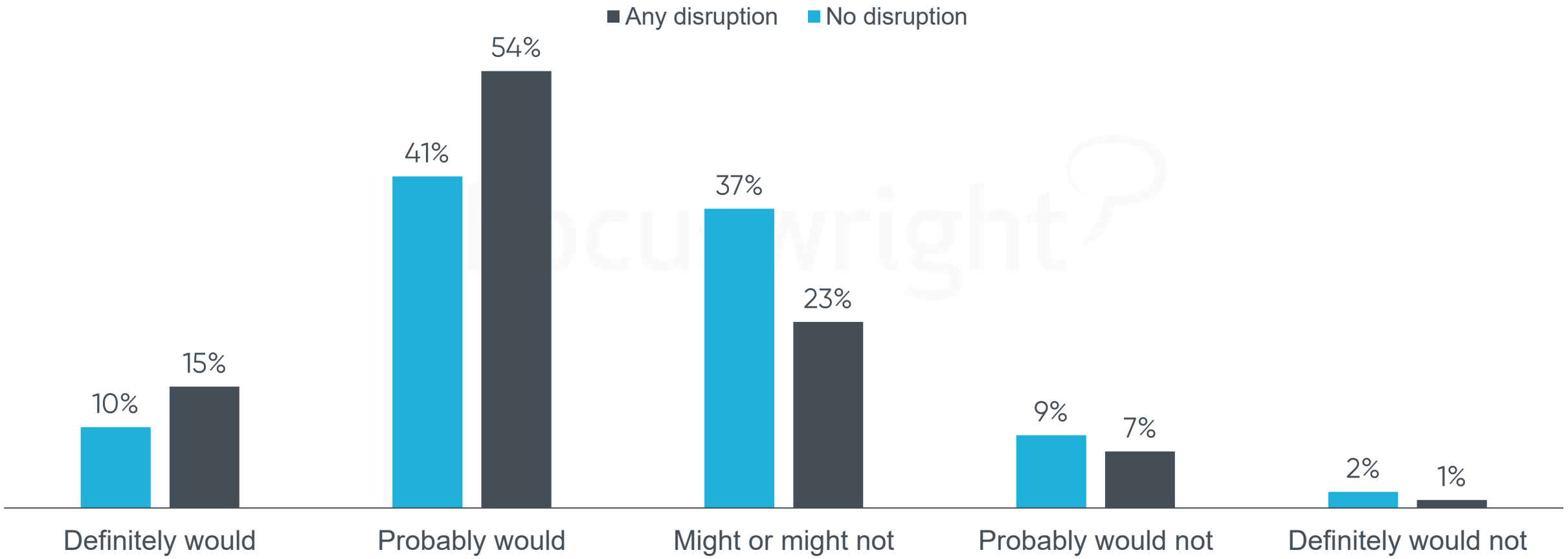
"Flag of Japan" by inu-photo, CC BY-ND 2.0

Source: *Global Booking Anxiety Study 2026*

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Japanese travelers who experienced recent travel disruptions are more likely to purchase refund protection.

Japan Refund Protection Purchase Intent, by Disruption Experience



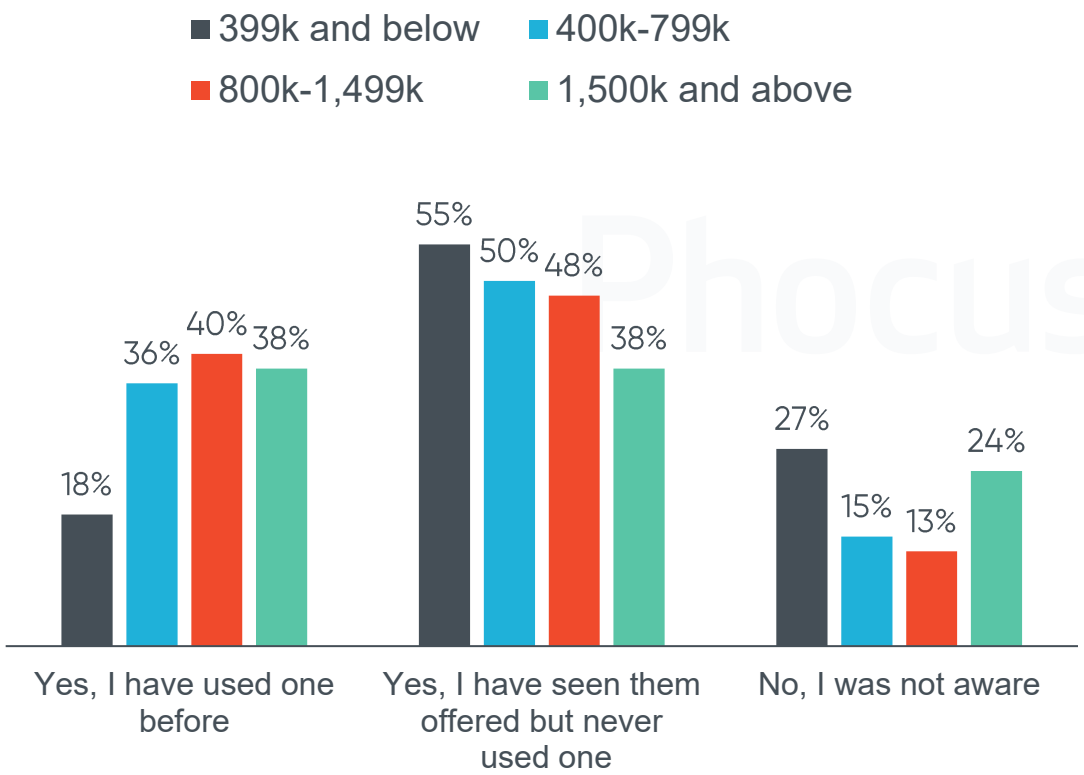
Question: If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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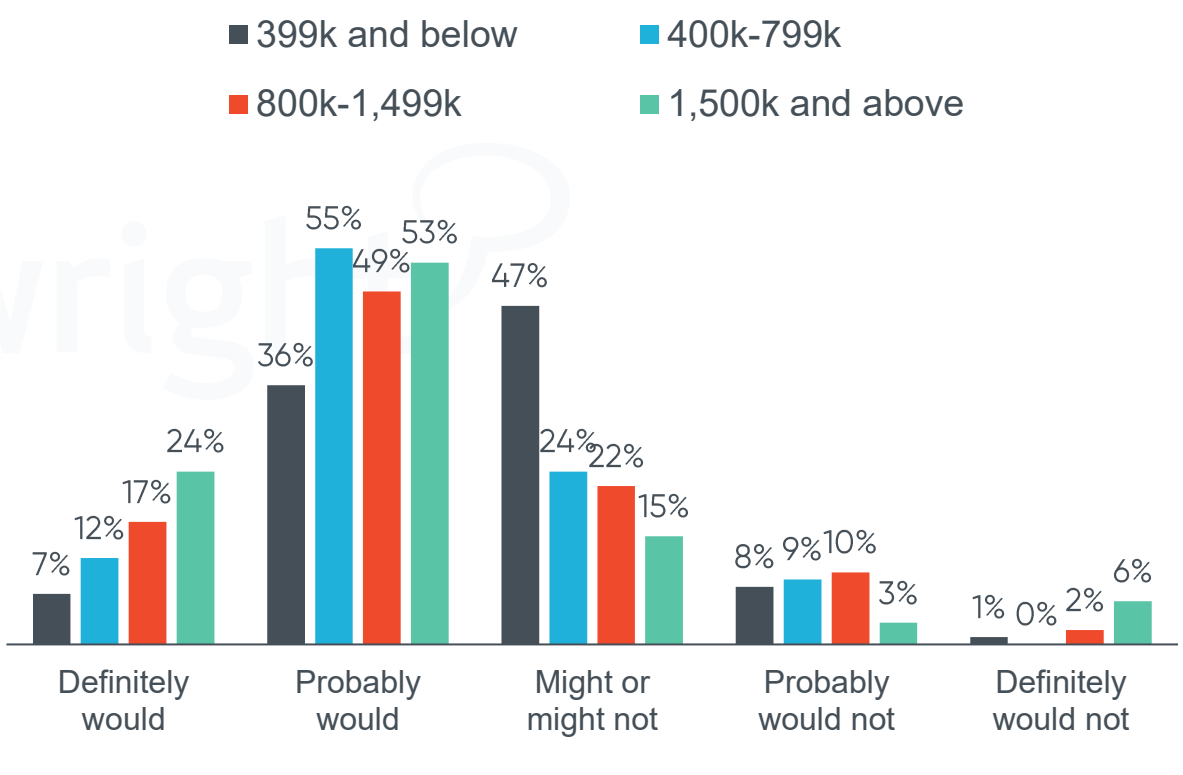
Japanese travelers with higher household income exhibit higher awareness, usage and intent for refund protection.

Refund Protection

Japan Awareness, by Annual HHI



Japan Purchase Intent, by Annual HHI



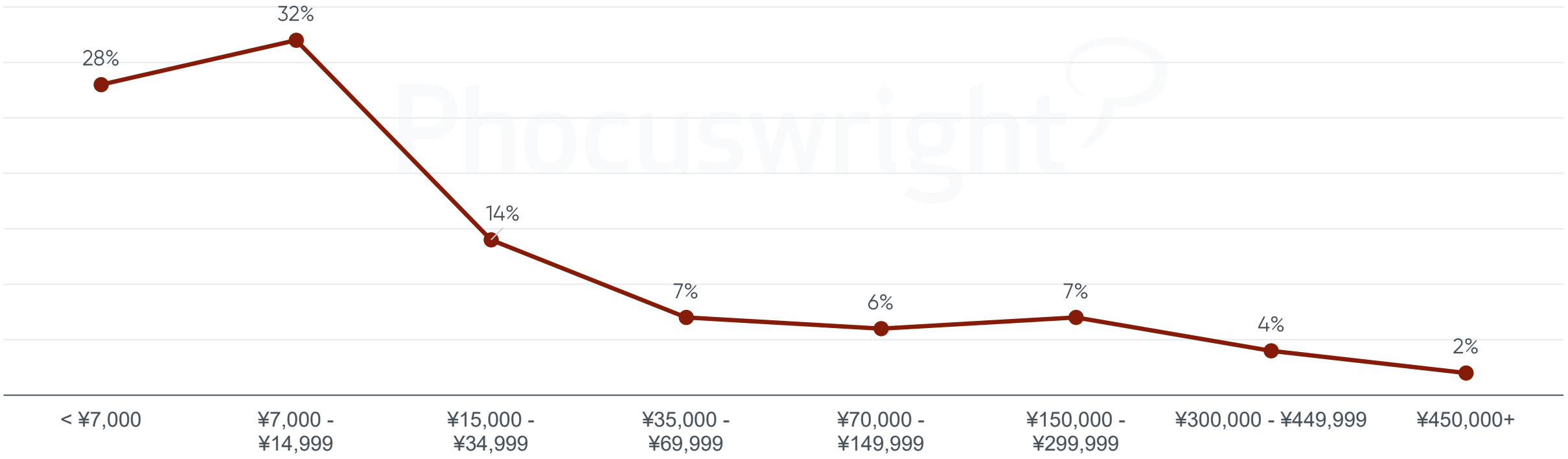
Question: Before today, were you aware that booking protection or refund protection products exist (separate from traditional travel insurance)?; If refund protection were available at checkout for your next international trip or event ticket purchase, how likely would you be to purchase it with your booking?
Base: Total respondents (Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Travelers in APAC are most likely to add protection to lower-priced purchases.

Japan travelers also prefer lower-priced refund protection products, with the lowest two tiers seeing most interest.

Japan, Per Person Event/Ticket Price Would Add Refund Protection, in Local Currency



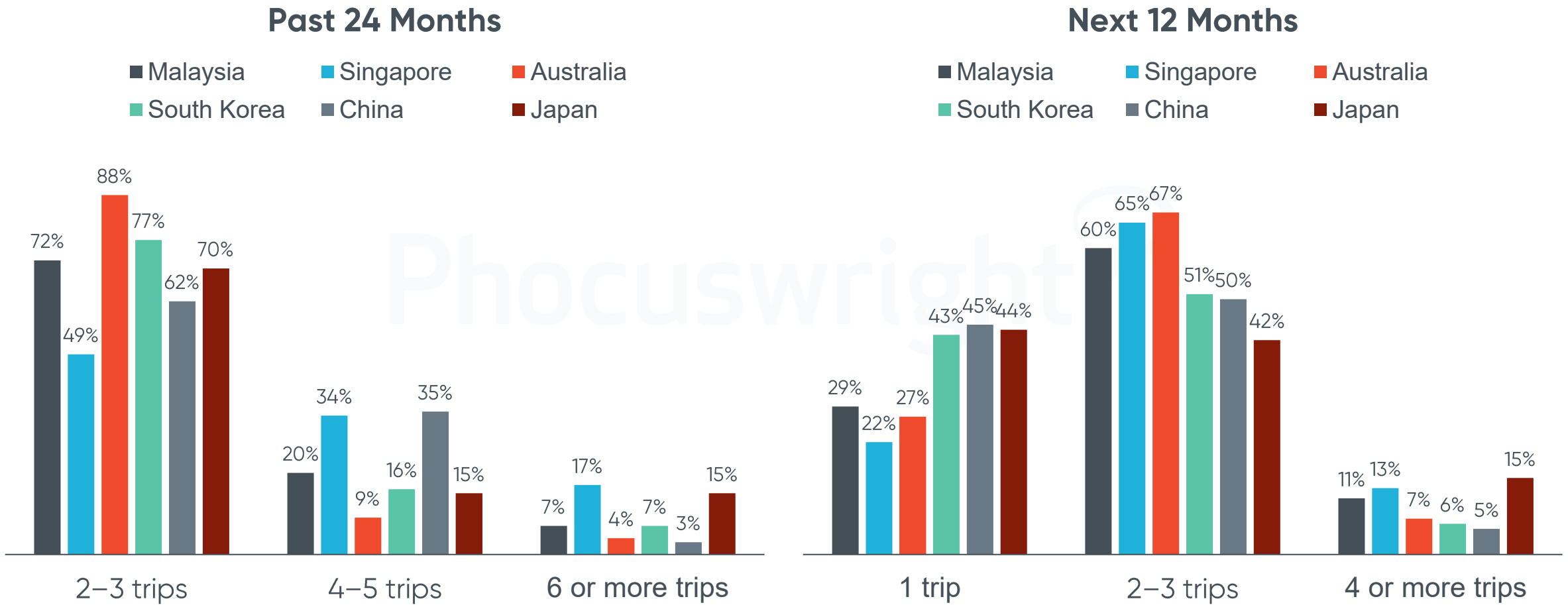
Question: Thinking about different options (international trips or event tickets) refund protection can be offered for, at what per person price (excluding taxes and fees) would you add refund protection to your purchase or booking? (Local currency)
Base: Respondents who would purchase refund protection (Japan N=296)
Source: *Global Booking Anxiety Study 2026*

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Appendix

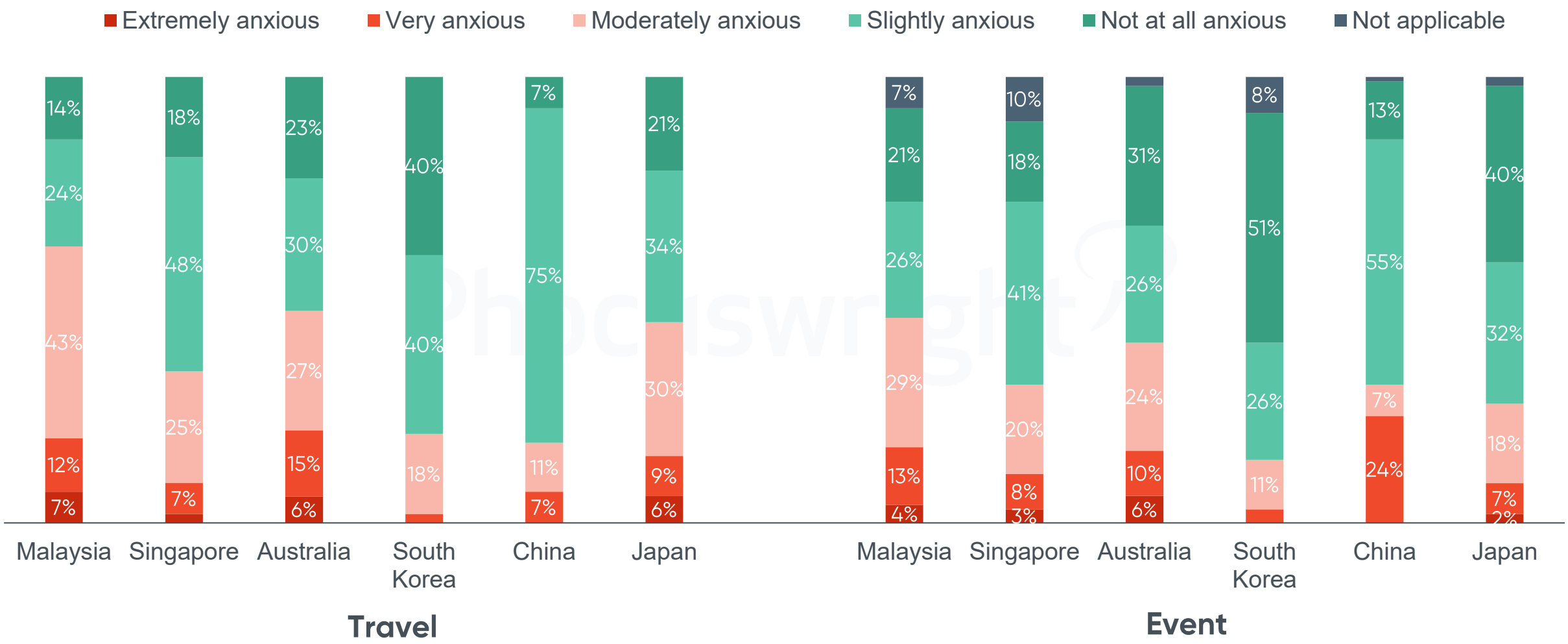
International Leisure Trips



Question: How many international leisure trips have you taken in the past 24 months?; How many international leisure trips are you planning to take in the next 12 months?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300) Source: *Global Booking Anxiety Study 2026*

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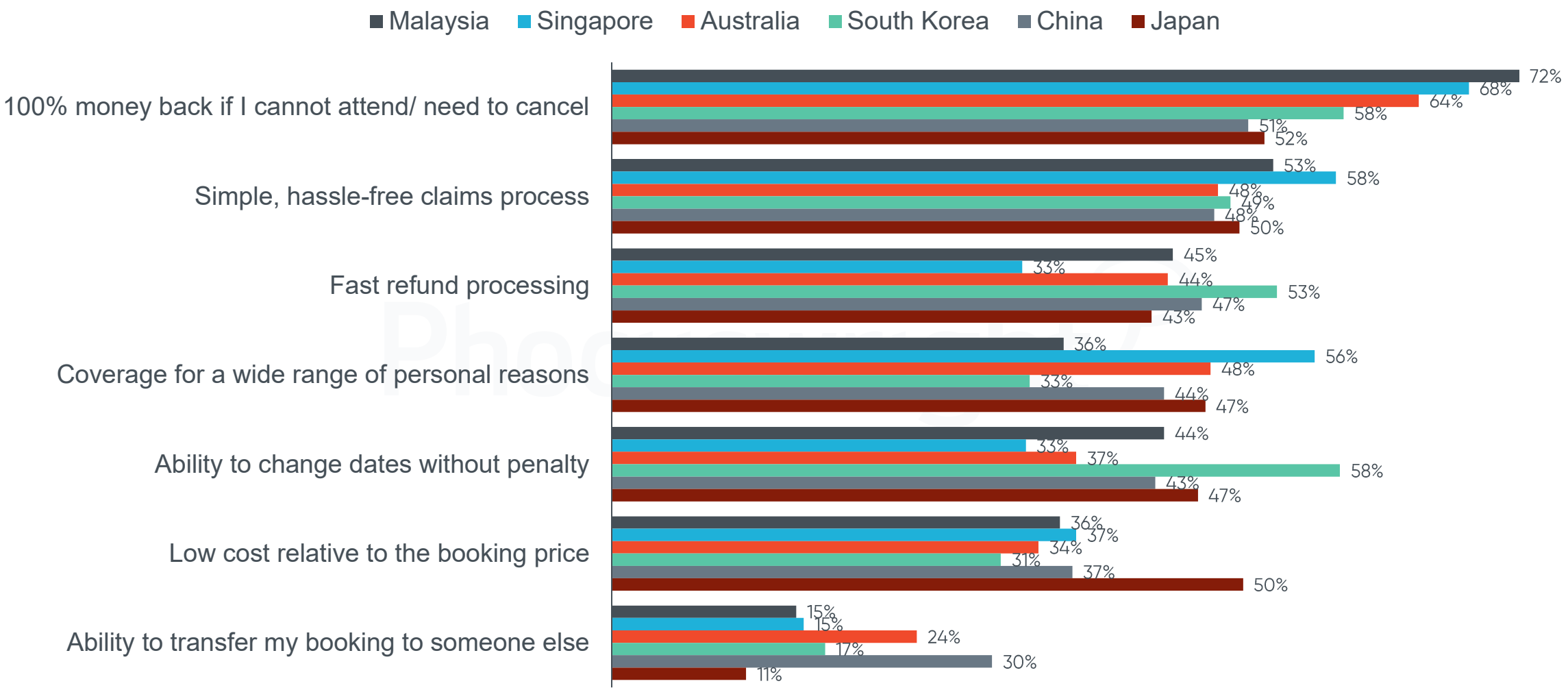
Level of Anxiety When Booking International Trips or Events



Question: When you think about booking an international trip, how anxious do you generally feel?; When you think about purchasing tickets for an event (e.g., concert, sports, festival), how anxious do you generally feel?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300) Source: *Global Booking Anxiety Study 2026*

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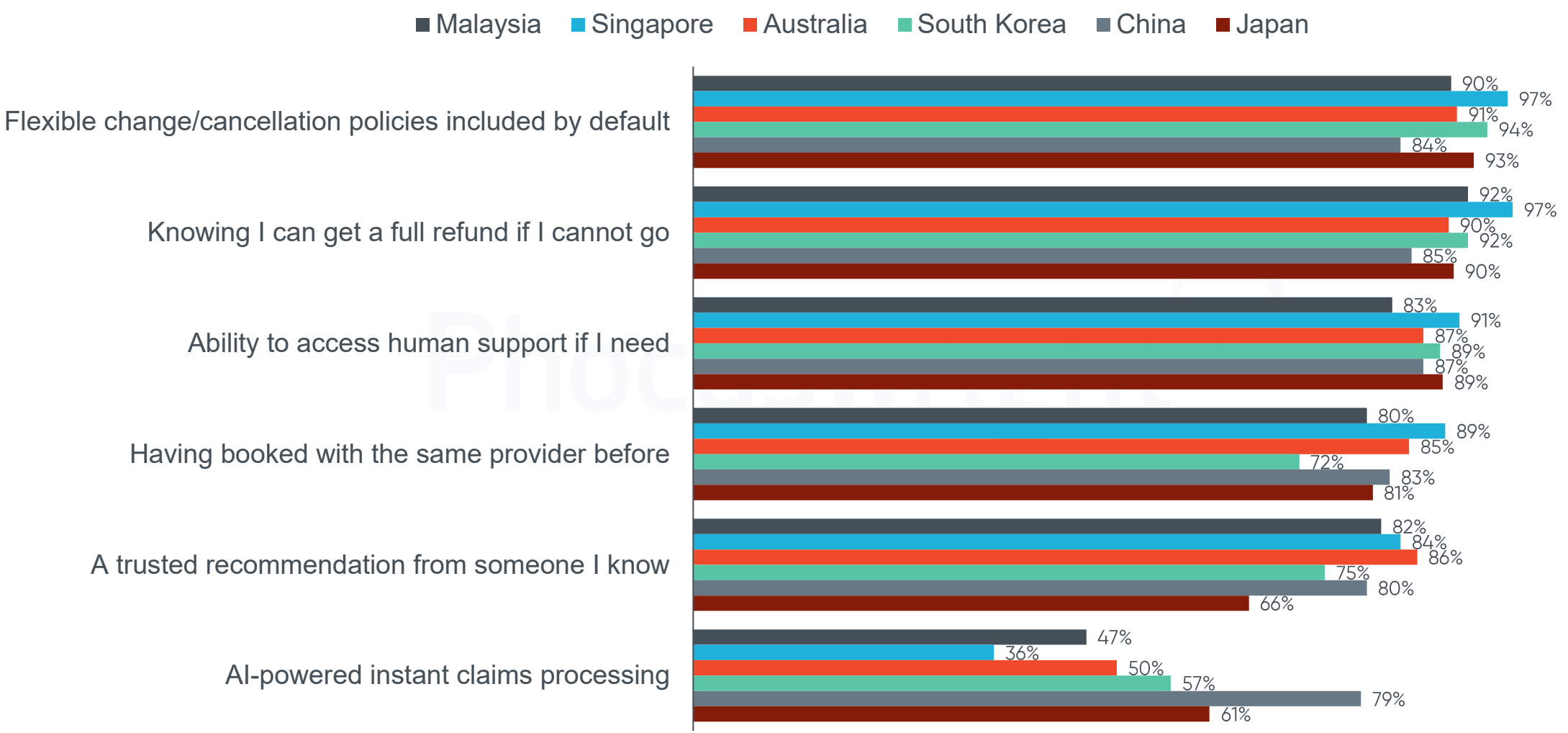
Refund Protection Purchase Drivers, Ranked Top Three



Question: Which of the following features would make you most likely to purchase refund protection? Rank your top 3 in order of importance where 1 is the most important.
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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Confidence Factors for Booking, Ranked Top Five



Question: Which of the following would most increase your confidence to book an international trip or purchase event tickets today?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

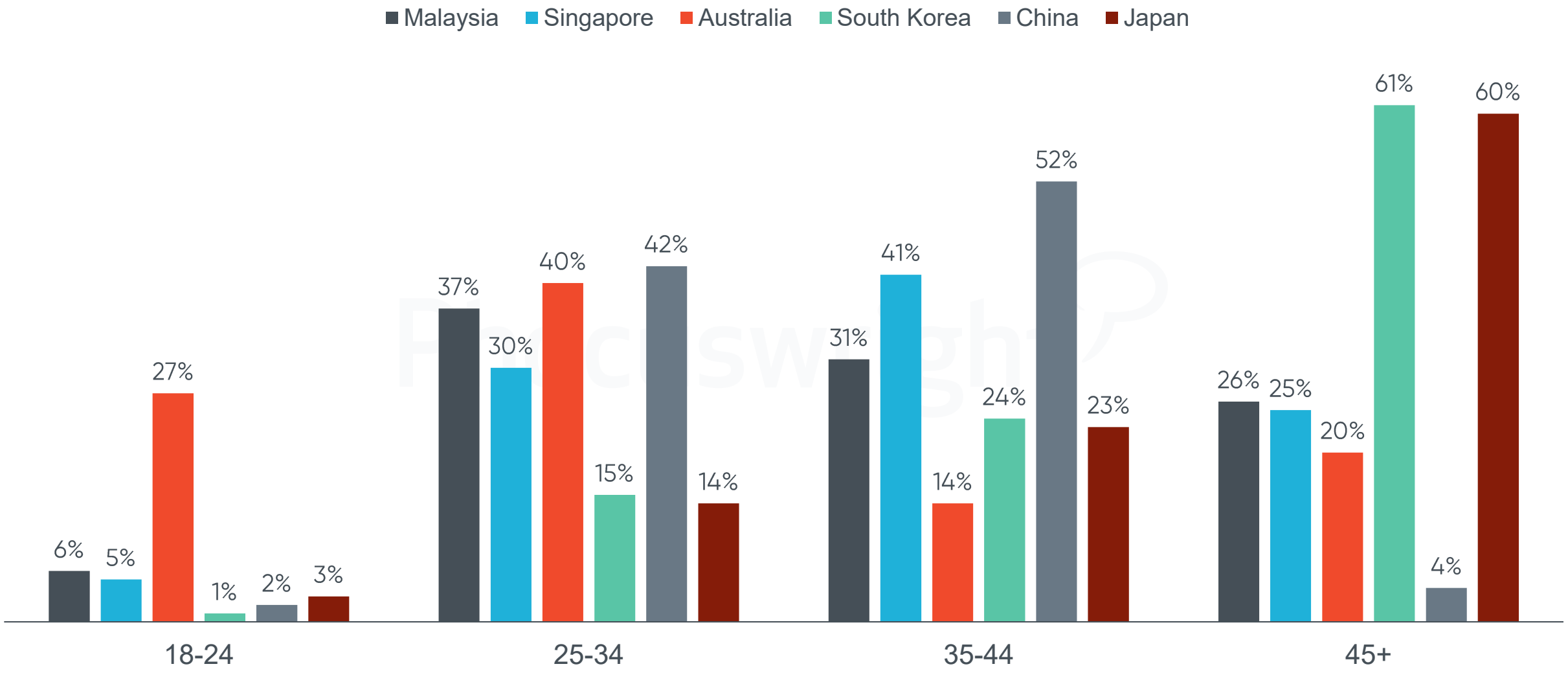
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Demographics

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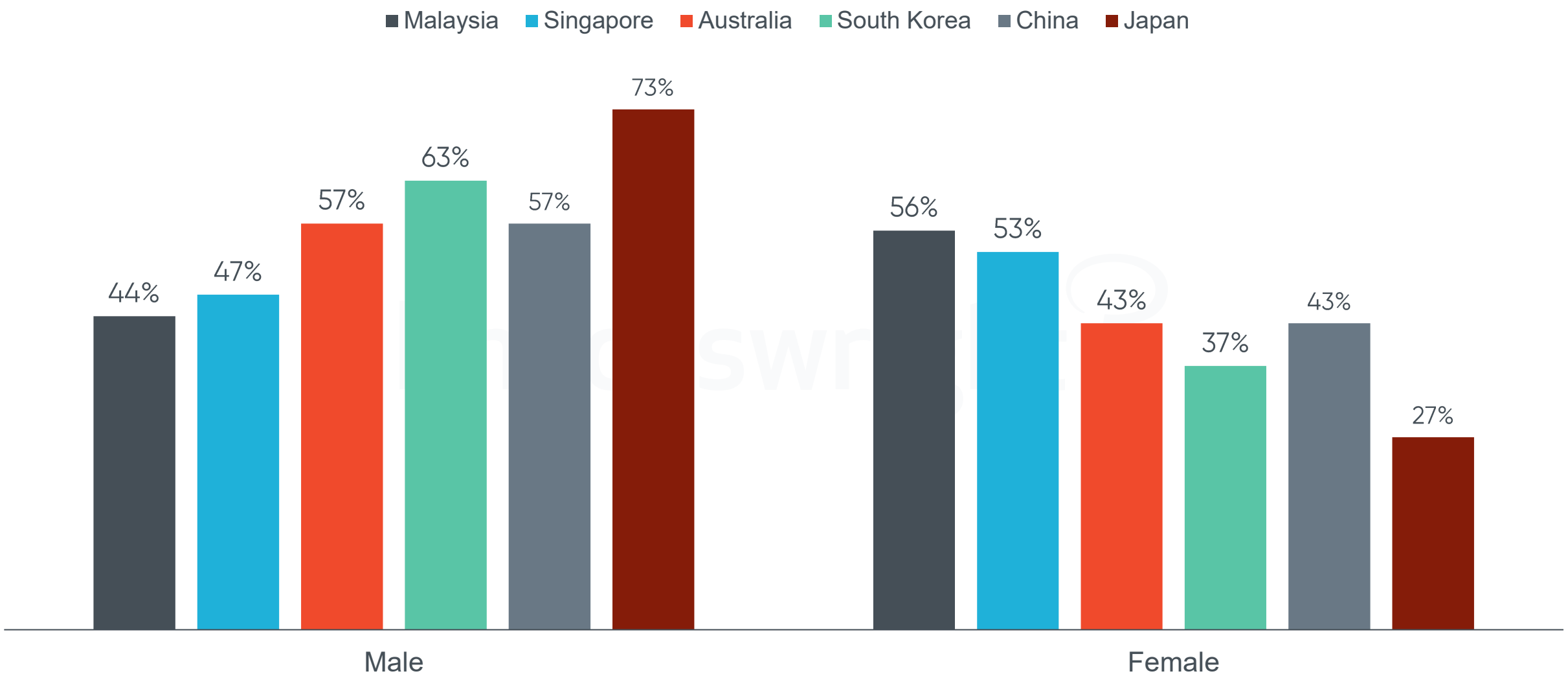
Age



Question: Please enter your age below.
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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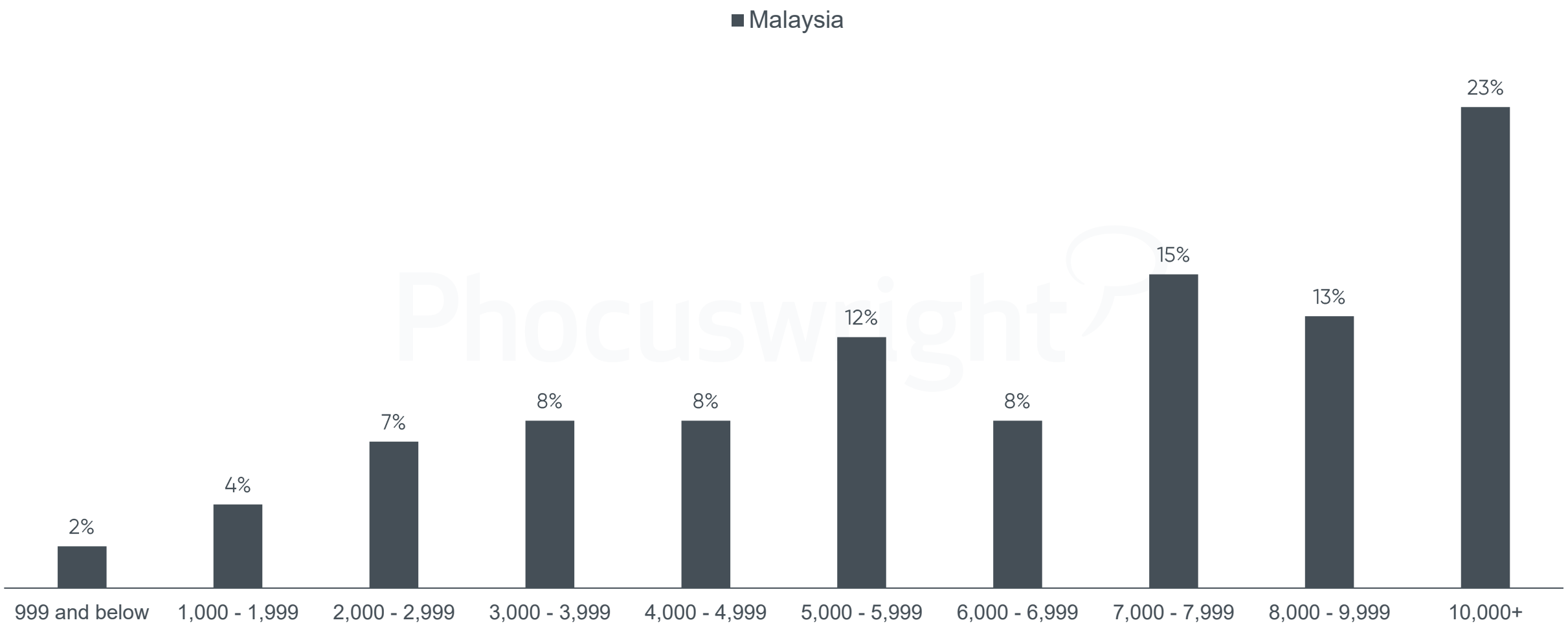
Gender



Question: Which gender identity do you most identify with?
Base: Total respondents (Malaysia N=300; Singapore N=300; Australia N=300; South Korea N=300; China N=300; Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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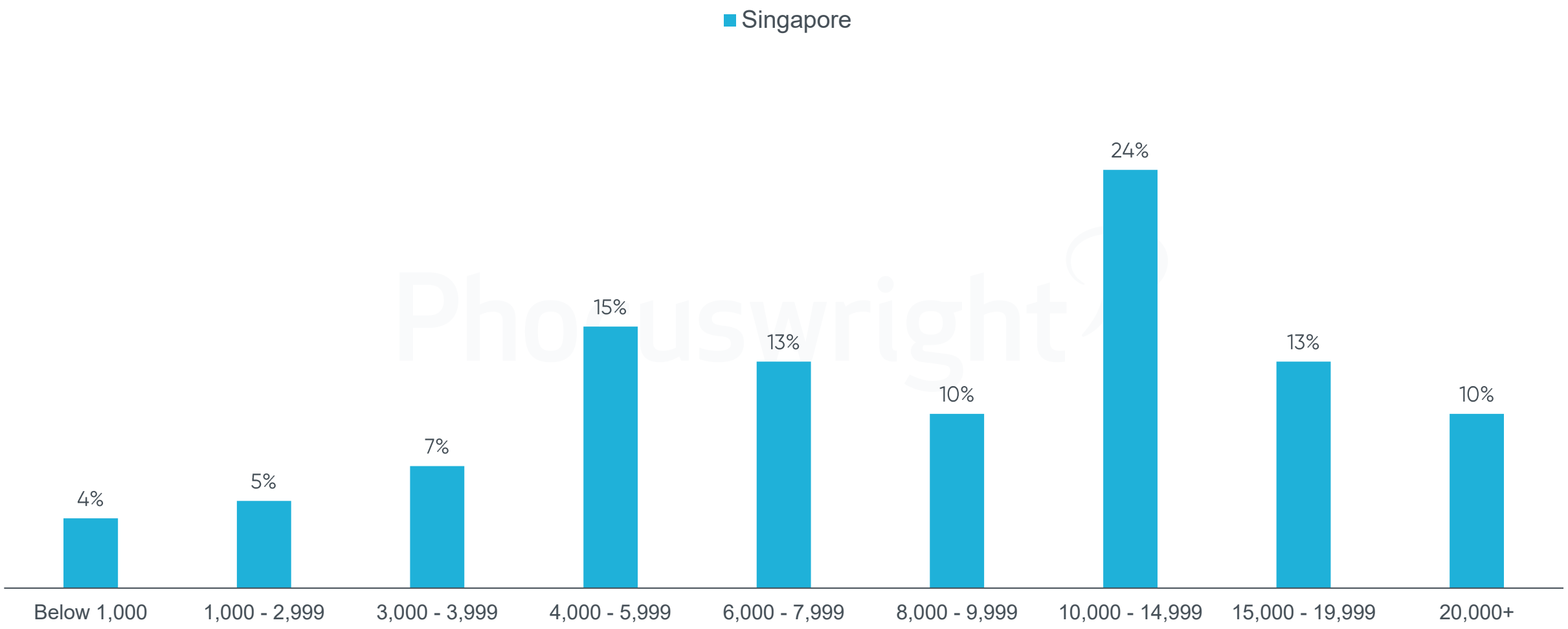
Household Income, Malaysia, in Local Currency (MYR)



Question: If you add up the income from all sources, what is your average NET household income per month?
Base: Total respondents (Malaysia N=300)
Source: *Global Booking Anxiety Study 2026*

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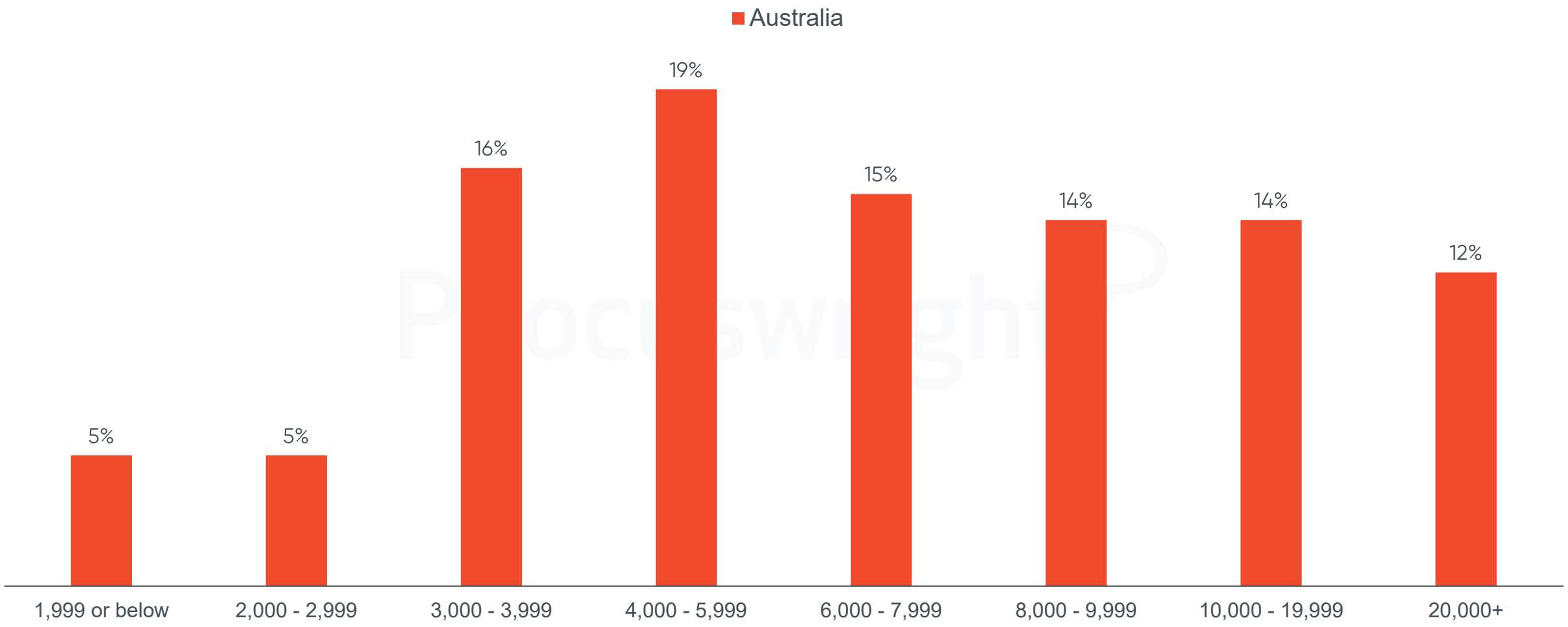
Household Income, Singapore, in Local Currency (SGD)



Question: If you add up the income from all sources, what is your average NET household income per month?
Base: Total respondents (Singapore N=300)
Source: *Global Booking Anxiety Study 2026*

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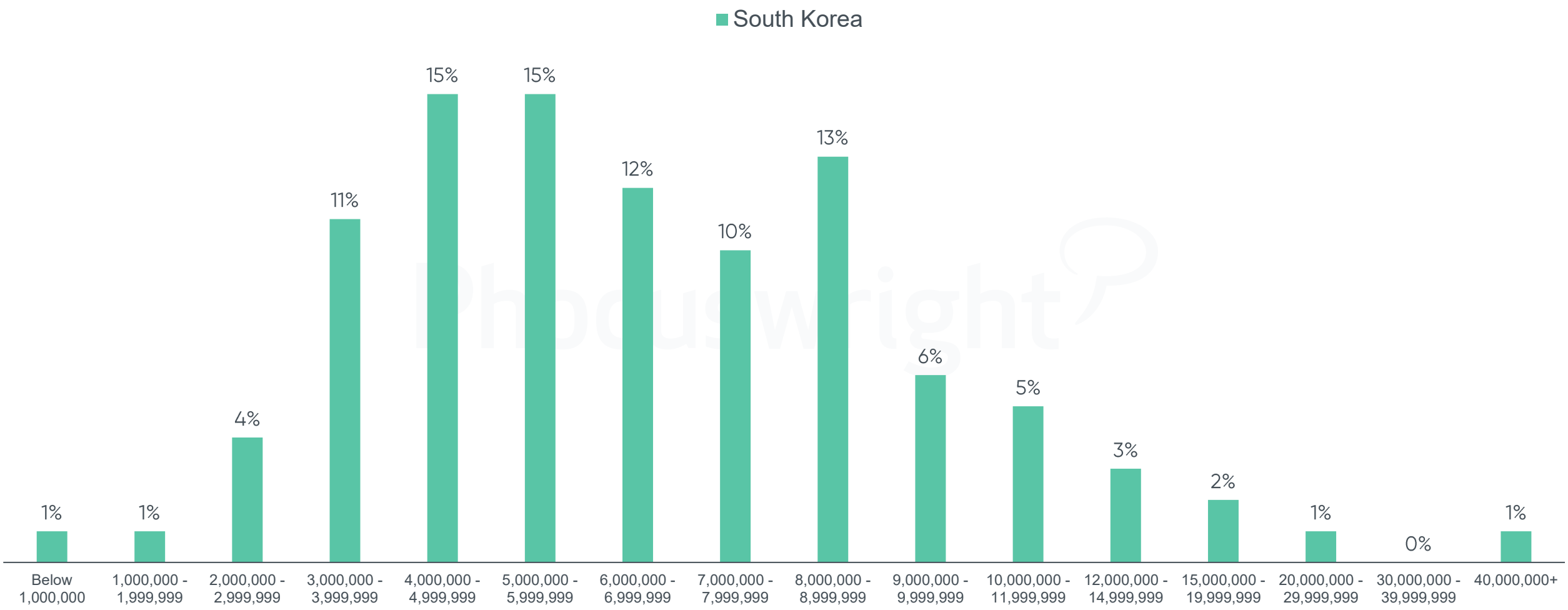
Household Income, Australia, in Local Currency (AUD)



Question: If you add up the income from all sources, what is your average NET household income per month?
Base: Total respondents (Australia N=300)
Source: *Global Booking Anxiety Study 2026*

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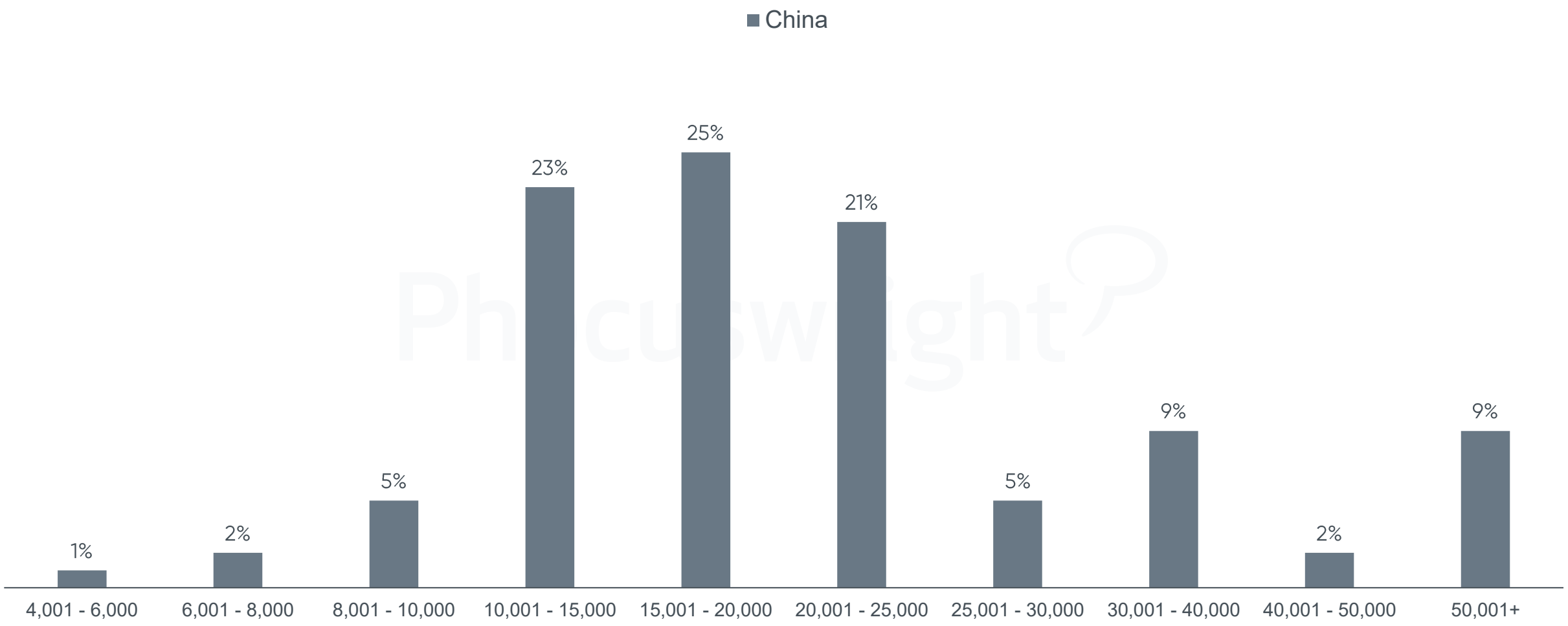
Household Income, South Korea, in Local Currency (KRW)



Question: If you add up the income from all sources, what is your average NET household income per month?
Base: Total respondents (South Korea N=300)
Source: *Global Booking Anxiety Study 2026*

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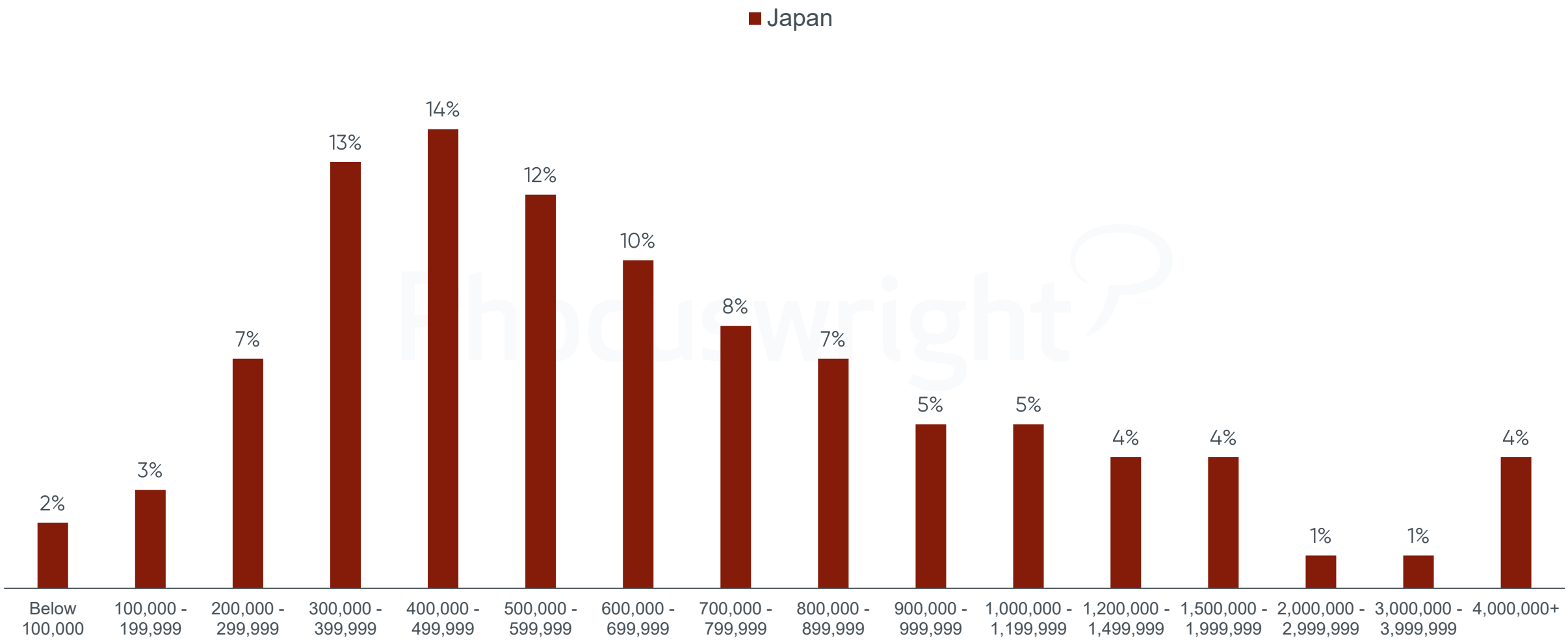
Household Income, China, in Local Currency (RMB)



Question: If you add up the income from all sources, what is your average NET household income per month?
Base: Total respondents (China N=300)
Source: *Global Booking Anxiety Study 2026*

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Household Income, Japan, in Local Currency (JPY)



Question: If you add up the income from all sources, what is your average NET household income per month?
Base: Total respondents (Japan N=300)
Source: *Global Booking Anxiety Study 2026*

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