

Market Research Report on Chinese Outbound Tourist (City) Consumption (2014-2015)

World Tourism Cities Federation
Ipsos

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Preface

Market Research Report on Chinese Outbound Tourist (City) Consumption in 2015 is a systematic market research with certain depth and breadth as well as project completeness and timeliness, which is an important part of systems engineering for WTCF to guide the sustainable development of the tourism industry and plays the advantage of organization. At the same time, the research is also a significant channel and way to enrich the databases of WTCF, improve the information exchange and interaction among the industry, organization, market, clients and consumers, and perfect the industrial system of tourism.

Following the *Market Research Report on Chinese Outbound Tourist (City) Consumption in 2014* successfully released at Beijing Fragrant Hills Tourism Summit 2014, in 2015, World Tourism Cities Federation (WTCF) led to design a comprehensive new research item and questionnaire, set a wider survey scope and effectively organized WTCF members such as CITS Head Office, CYTS Group, CAISSA Tourism and UTS International Travel to participate, and once again, entrusted Ipsos, one of the world's top three market research firms to conduct the research and questionnaire survey across China within six months. According to the latest development of the tourism industry, the public focus change in outbound tourism consumption, and the general attention degree and focuses of members, great efforts are made to fully reflect the existing market situations, and finally complete the "Market Research Report on Chinese Outbound Tourist (City) Consumption in 2015".

This market research includes as many as 94 categories of project content in the questionnaire, in which the mandatory items reach 416, to which any general market research is not comparable. In addition, the scope of the research has also been increased in terms of width. Through various ways and channels of cooperation, the Internet and microblogging, WeChat and other means, the quantitative questionnaire survey is carried out on 17,810 Chinese outbound tourists, and by means of the integrity and effectiveness screening, ultimately 7,813 valid questionnaires are determined.

The respondents of the survey are those Chinese citizens who had an experience of outbound travel within one year before April 2015. The questionnaires were collected between April and May, and were processed with statistics and analysis from June, and then the research report was prepared.

In view of the huge base number of China's outbound tourists to Hong Kong, Macao and Taiwan, with frequent flows, the prominent data reflected by such tourists may have a certain



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impact on the correct assessment of the overall data generated from other countries or regions, so the respondents of this research exclude those visitors only going to Hong Kong, Macao and Taiwan. And all the items of the questionnaire clearly state that “their responses don’t involve the information on the tourism experience in Hong Kong, Macao and Taiwan such as travel times, experience, costs and others”.

Based on the new and hot topics of tourism, new demands, and newly-added content different from that of the previous research, this research focuses on the analysis of the following items:

1. Continuously analyze the growth trends and causes of China’s outbound travel market;
2. The Internet and mobile information platform serve as a boost to Chinese outbound tourists’ choice of tourist products, so as to obtain and book on-line and off-line tourism product information;
3. Changes in Chinese tourists’ focuses and their continuous appeals;
4. Chinese tourists’ value consideration of inbound tourism and outbound tourism;
5. Changes in Chinese tourists’ outbound tourism consumption patterns and willingness.
6. Continuous increase in China’s domestic tourism consumption and its comparison with outbound tourism are to more systematically indicate the trend of outbound tourism, consumption structure and its characteristics.

This research and analysis also adopt the relevant data and conclusions of *Utilization of Chinese Tourist Consumption Payment Big Data Systems*, a market research project jointly conducted by WTCF and China UnionPay, to analyze the contribution of tourism to the economy and consumption structure, with the aim of fully presenting the consumption structure and market trends in China’s outbound tourist market.

This research draws its attention to the emphasis of Chinese tourists on the travel experience with the improvement of Chinese people’s living standards, and the important role of inbound tourism and outbound tourism in improving the quality of life and happiness index. At the same time, the research also focuses on the relevant information, tourism information and communication channels which have impacts on Chinese tourists in making their tourism choices.

The research shows that more than a third of Chinese tourists are of opinion that travel is the same important in life as love and marriage, household wealth, career development, learning and education, health care, and the healthy growth of children, and plays a big role in

enhancing the quality of life and well-being index.

With the aim of enabling the world tourism cities to better understand Chinese tourists and helping the tourist cities and relevant travel agencies better grasp the consumption willingness and behavior characteristics of Chinese outbound tourists, the annual report of 2015 continues to comprehensively depict the group characteristics of Chinese outbound tourists by using the information about tourist source areas, tourism destination preferences, cultural characteristics, tourism features, and their concerns before departure; and the information about tourism destinations and attraction elements is adopted to explore how tourism cities attract Chinese outbound tourists. It covers the Chinese tourists' assessments on the whole overseas tourism process - information inquiry, visa processing, catering, accommodation, transportation, sightseeing, shopping, entertainment and public services.

This research explicitly indicates that Chinese tourists have the heartfelt enthusiasm for tourism. As the average income of nationals grows continuously and Chinese economy is entering the post-industrial era, and the age of technological innovation, business model innovation and the Internet, the tourism industry has become a pillar industry of China's social economy. Meanwhile, the public in China attach growing importance to multiple benefits of tourism, which will make more and more people choose to travel abroad. Chinese inbound tourism and outbound tourism will maintain the faster growth trend and larger demand for a long time in the future, which is irreversible. It not only brings the new heyday for the development of the tourism industry in China, but also creates new opportunities and challenges for the breadth and depth of the development of the tourism industry.

Compared with the research in 2014, this research highlights the following characteristics:

I. Focus on impact of emotional factors on Chinese outbound tourists in terms of travel decisions and behaviors. The research shows that emotional factors are influenced by "communication" and "personal experience". With the great popularity of the Internet and mobile Internet, microblogging, WeChat, forums, QQ groups, travel gurus' travel notes sharing and other Internet communication are playing an increasingly important role in the tourism promotion. The satisfaction on travel experience can determine whether they will once again choose the city for the second tour or vacation travel. The repeated in-depth tours have become the new trend of Chinese outbound tourist source market.

II. It adds new researches on the Mediterranean tourism, African tourism and other emerging tourist destinations. In order to better reflect the market segments and geographical characteristics and



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help local tourist cities and tourism organizations understand Chinese tourists, more attention is paid to the Mediterranean tourism and African tourism markets in the questionnaire.

III. It investigates the concern about Chinese tourists to relevant travel agencies and brand quality while traveling abroad. It investigates the preferences of Chinese tourists about the use of credit cards, insurance companies, and types of insurance, travel agencies, tourism websites, services options, shopping types and venues, spending amount, oceanic passenger liner and other aspects. It hopes to provide some reference for the industry to better perform Chinese outbound business.

IV. It adds the research on the customer civilization. The relevant items show that the sense of respect to the tourism recourses, the friendly behavior, in-depth understanding of laws and appreciation attitudes have received general recognition, and it proves with the facts that civilized tourism promoted by the State has been greatly improved. Meanwhile, some changes in Chinese outbound tourists' overseas shopping motivations and options also indicate that Chinese outbound tourists are more rational about overseas consumption.

This research is aimed to provide WTCF members with a reference report of timeliness, clear thinking, high value and useful guideline for some operation advantages.

The research enriches the collection data through many methods including use of Ipsos's network-based online interviews. In addition, the questionnaire survey is also delivered by WTCF tour operator members, the retail agencies, their online service networks, websites, microblogs and CRM systems and other channels.

WTCF is committed to promoting the exchange and cooperation between its members for effective operation and business prosperity. It hopes its six functional roles of information, academics, data, activities, cooperation and training will productively benefit the members.

It is hoped that this research can help WTCF members to grasp such dynamic new normal in a timely way, carry forward the core concept of "Better City Life Through Tourism", meet the expectations of members for WTCF, and build up the international influence of WTCF to better boost the prosperity and development of the global tourism industry.

We would like to extend our sincere thanks to CITS Head Office, CYTS Group, CAISSA Tourism, UTS International Travel, China UnionPay and other institutional members which have assisted this research on Chinese outbound tourist market, and to all the staff offering assistance, a large number of outbound tourists completed the questionnaire, and those people concerned about this research.