

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

By | Ipsos

Following the successful release of "Market Research Report on Chinese Outbound Tourist (City) Consumption in 2014", September 2014, in 2015, World Tourism Cities Federation (WTCF) took the lead in the design of a new survey and questionnaire for a wider range of investigation. WTCF successfully organized its members, such as China International Travel Service Limited, Head Office (CITS), China Youth Travel Service (CYTS), CAISSA (China), and UTS, to actively involve in the survey, and again, commissioned Ipsos, one of the world's three biggest market research institutions to carry out the social survey in the following six months in China. Based on the latest development characteristics of the tourism industry, changes of public concerns on outbound tourism consumption, and in line with the general attention and concerns of WTCF members, Ipsos finally completed "Market Research Report on Chinese Outbound Tourist (City) Consumption 2015" that fully reflected the current market situation.



The survey showed that more than a third of Chinese tourists considered travel as important as love and marriage, family wealth, career development, learning and education, health care, and child growth. It was significant in improving the index of the quality of life and people's well-being.

We could see the heartfelt enthusiasm of Chinese tourists to travel. With the continued growth of per capita income, and as Chinese economy gradually entered the post-industrial era and an era of science and technology innovation, business model innovation and the Internet+, tourism has become a pillar industry in China's social and economical development. Meanwhile, the Chinese public attached growing importance to the multiple benefits of tourism and more and more people chose to travel abroad. The growth momentum of China's domestic and outbound tourism would be high over a long period of time. It not only brought new prosperity of the tourism industry in China, but also posted new opportunities and challenges for the development of tourism in breadth and depth.

Popular Outbound Tourist Destinations among Chinese People

The footprints of Chinese outbound tourists were found in every corner of the world between 2014 and 2015. Asian cities were still most chosen destinations by Chinese outbound tourists (77.67%), followed by European cities (32.07%) and American cities (20.29%).

South Korea and Japan were most popular in Asian. They were followed by cities in Southeast Asia. In Europe, France, Britain and Italy were most visited, and in America, it was the United States. According to the survey, cities with direct flight were most visited by Chinese outbound tourists. The reputation of the flights also had a direct impact on tours to these destinations.

With the growth in income, the destination of Chinese tourists gradually expanded from Asia to the world

Asia is a preferred choice of Chinese outbound tourists, but as their incomes rose, they tended to choose middle and long-distance travel, first to Europe, then to America, Oceania and Africa. The survey showed that although the absolute number of Chinese tourists to Africa was small, the growth was prominent.

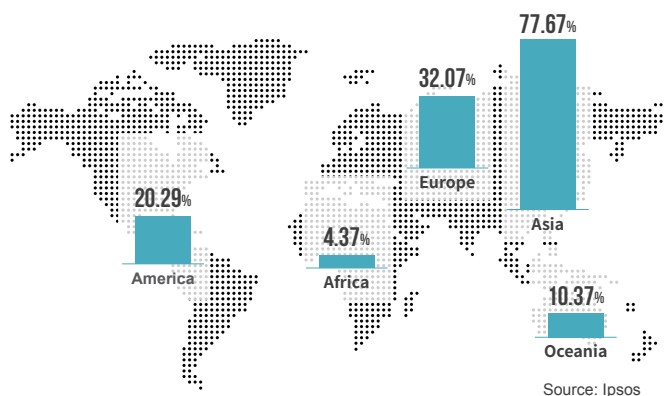
Japan, South Korea and Southeast Asian cities were most popular in short-distance travels.

The top ten cities Chinese outbound tourists chose for short-distance travels over the past year were Seoul, Bangkok, Tokyo, Osaka, Nagoya, Jeju Island, Singapore, Incheon, Kobe and Nara.

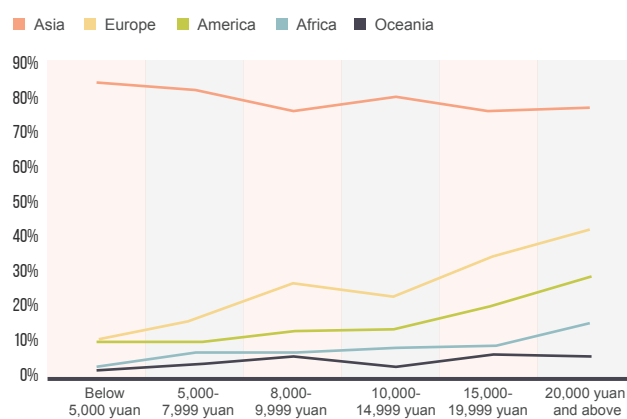
In long-distance travels, the most popular were Europe, the United States, and Australia

and the top ten cities Chinese outbound tourists chose for long-distance travels over the past year were Paris, London, Sydney, Los Angeles, Rome, New York, Washington, San Francisco, Melbourne and Venice.

Continental Distribution of Chinese Outbound Destinations



Destination Preference of Chinese Outbound Tourists with Different



When traveled again, Chinese outbound tourists chose Seoul, Tokyo and the Maldives most for short-distance tours, and London, Paris and Sydney for long-distance tours.

Popular Destination Cities among Chinese Outbound Tourists in the Past Year

Ranking	Short Distance Cities	Ranking	Long Distance Cities
1	Seoul (South Korea)	1	Paris (France)
2	Bangkok (Thailand)	2	London (UK)
3	Tokyo (Japan)	3	Sydney (Australia)
4	Osaka (Japan)	4	Los Angeles (USA)
5	Nagoya (Japan)	5	Rome (Italy)
6	Jeju Island (South Korea)	6	New York (USA)
7	Singapore (Singapore)	7	Washington (USA)
8	Incheon (South Korea)	8	San Francisco (USA)
9	Kobe (Japan)	9	Melbourne (Australia)
10	Nara (Japan)	10	Venice (Italy)

Popular Destination Cities among Chinese Outbound Tourists for a second tour

Ranking	Short Distance Cities	Ranking	Long Distance Cities
1	Seoul (South Korea)	1	London (UK)
2	Tokyo (Japan)	2	Paris (France)
3	Maldives	3	Sydney (Australia)
4	Jeju Island (South Korea)	4	Los Angeles (USA)
5	Osaka (Japan)	5	Rome (Italy)
6	Singapore (Singapore)	6	Hawaii (USA)
7	Nagoya (Japan)	7	New York (USA)
8	Bangkok (Thailand)	8	Milan (Italy)
9	Busan (South Korea)	9	Dubai (United Arab Emirates)
10	Chiang Mai (Thailand)	10	Melbourne (Australia)

Source: Ipsos

Note: This survey does not include tourists travelled to Hong Kong, Macao, and Taiwan only over the past year, or data of Hong Kong, Macao and Taiwan.

How "Word of Mouth" Influenced Outbound Travel Decisions

"Word of mouth" played an important role when Chinese outbound tourists chose their outbound travel destinations.

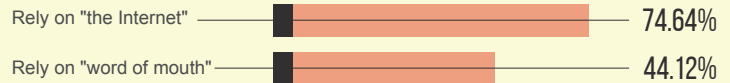
Before travelling abroad, 74.64% of Chinese tourists would join relevant WeChat, QQ groups or forums for tourist information, and 44.12% would turn to friends or family for advise.

"Communication" has become a norm behavior of Chinese outbound tourists after travelling abroad. With the penetration of Internet, especially mobile Internet, in China's outbound tourists (90.52% and 84.40% respectively), forms of communication became even more diverse.

WeChat and microblog were most used by Chinese tourists to disseminate travel information, followed by "verbal recommendation" to others. Travel notes and blogs were also indispensable in this effort.



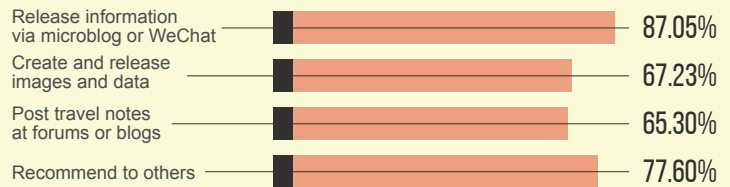
How Chinese Outbound Tourists Relied on "Word of Mouth"



Source: Ipsos



Communication Behavior of Chinese Outbound Tourists after Their Tours Abroad



Source: Ipsos

How Chinese Tourists Enquired and Got Tourist Information

Over half of Chinese outbound tourists would query attractions, restaurants, lodging and shopping information before travelling abroad. The name of cities and attractions were keywords for enquiry.



Shopping information more enquired by tourists to Japan and South Korea



Dining information more enquired by tourists to Southeast Asian cities



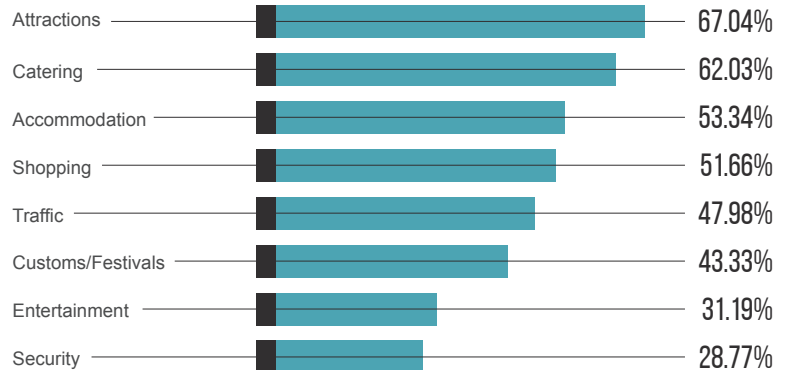
Transport more enquired by tourists to cities in Europe and America



Security information more enquired by tourists to Africa



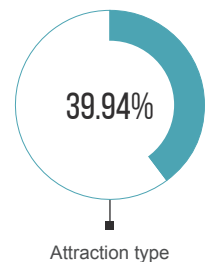
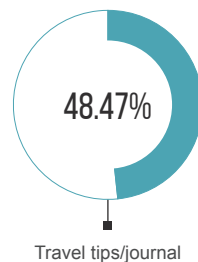
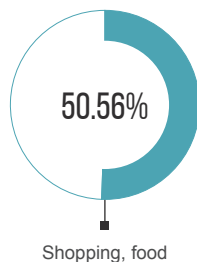
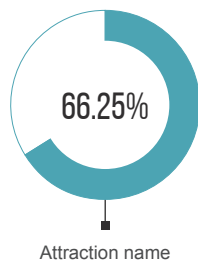
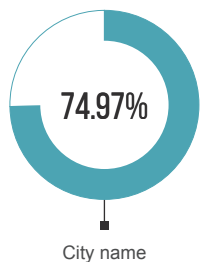
Chinese Outbound Tourists Information Search Category



Source: Ipsos



Chinese Outbound Tourists Information Search Keyword



Source: Ipsos

Among the diverse access to information, Chinese outbound tourists chose domestic tourism websites most for outbound travel information.



Travel agents or their official websites were more used by tourists to Japan and South Korea



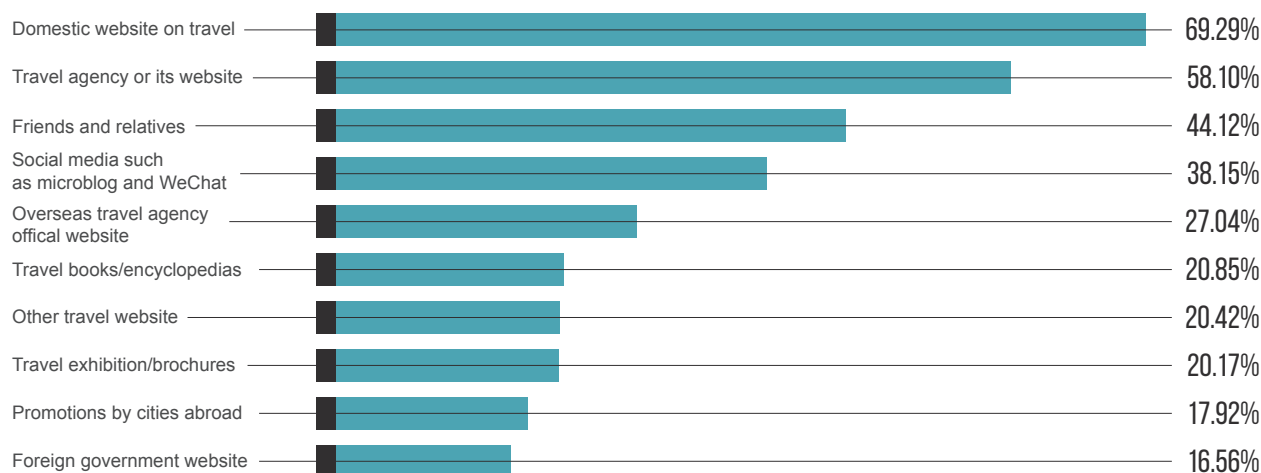
Domestic tourism websites were more used by tourists to Southeast Asia



Promotion by outbound tourist cities and websites of travel agencies abroad were more used by tourists to Europe, America and Africa



Chinese Outbound Tourists Information Query Channels

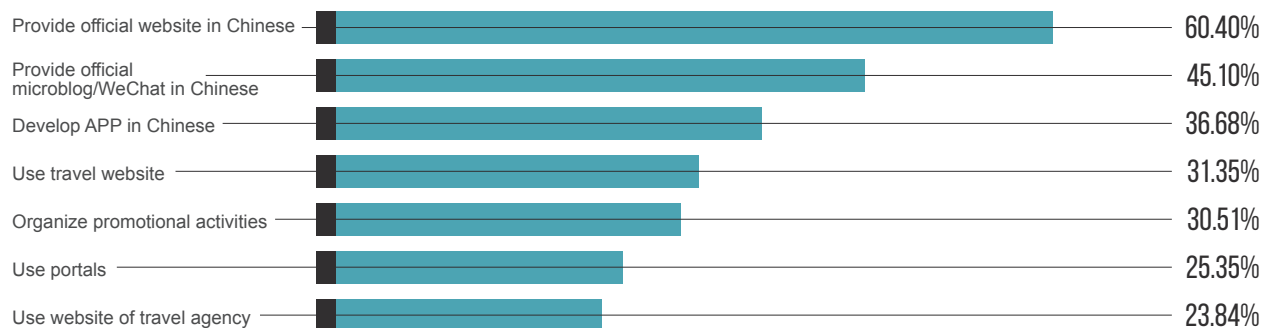


Source: Ipsos

Chinese outbound tourists most expected that cities abroad provide official website in Chinese, followed by official microblog/WeChat in Chinese.



Recommendations of Chinese Outbound Tourists for Information Dissemination Channels



Source: Ipsos

Chinese Outbound Tourists' Choice and Preference of Travel Insurance

The survey revealed that nearly a third (32.36%) of Chinese outbound tourists worried about their personal and property safety when travelling abroad, followed by medical assistance (19.17%) when they got ill.

Fortunately, the vast majority of Chinese outbound tourists have recognized and accepted travel insurance products.

In terms of purchase reasons

most bought insurance for prevention of various risks (72.11%).

In terms of purchase channels

most were purchased or sent as a gift by travel agencies or websites (66.68%), followed by buying via insurance companies (30.82%).

In terms of insurance types

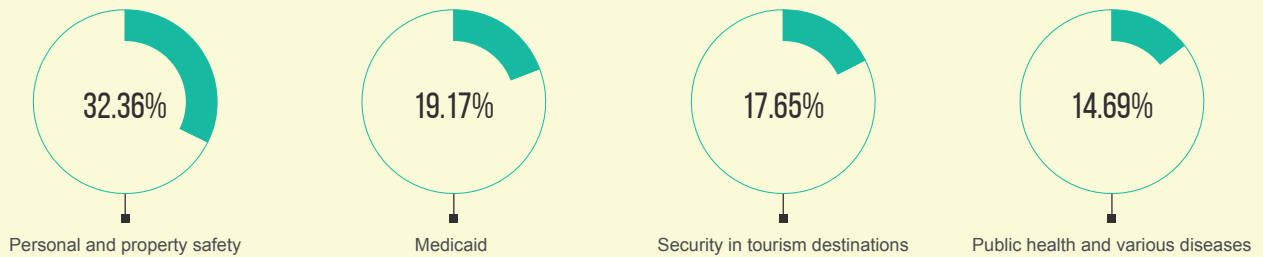
most were liability insurances bought by the travel agency (64.88%), followed by accident payments insurance (38.70%) bought by tourists themselves

In terms of insurance companies

tourists chose Chinese insurance companies more than foreign insurance companies, or 72.73% and 20.66% respectively.



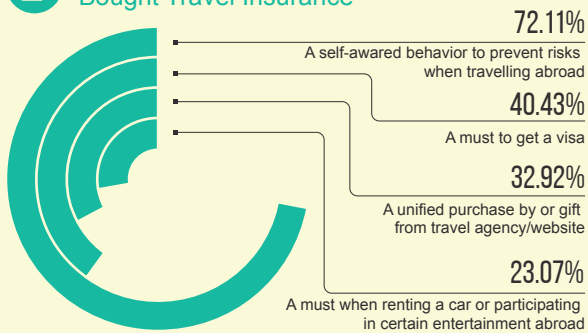
What Chinese Outbound Tourists Worried about



Source: Ipsos



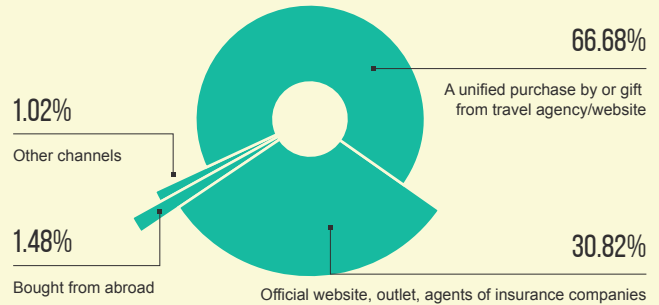
Why Chinese Outbound Tourists Bought Travel Insurance



Source: Ipsos



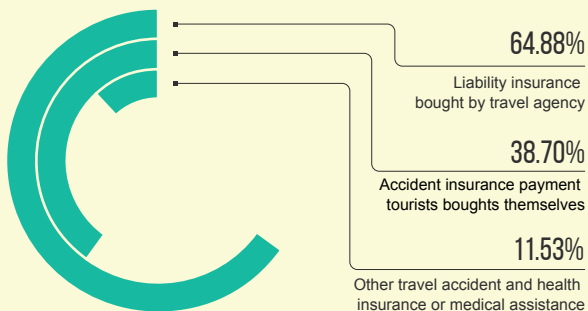
Channels for Chinese Outbound Tourists to Buy Travel Insurance



Source: Ipsos



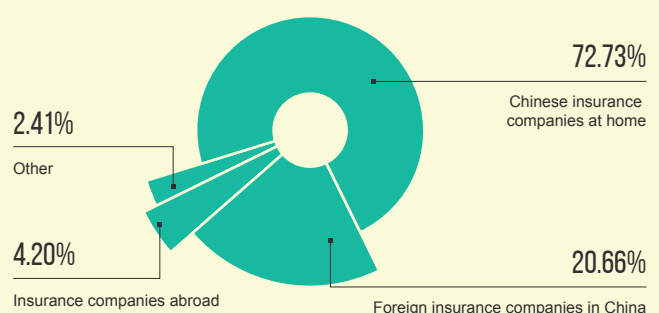
Types of Travel Insurance Chinese outbound Tourists Bought



Source: Ipsos



Chinese Outbound Tourists' Choice of Chinese or Foreign Insurance Companies



Source: Ipsos

Chinese Outbound Tourists' to Choices and Preferences of Travel Agencies

86.10 % of Chinese tourists chose group or independent tours provided by travel agencies in outbound travelling between 2014 and 2015.

Travel agency's official website was most used by Chinese tourists to book tours, followed by the outlets of travel agencies.

More than 85% of Chinese tourists would still choose various kinds of tourism products provided by travel agencies in the future. Free tour (including semi-free tour) products were most demanded, followed by group tour products.

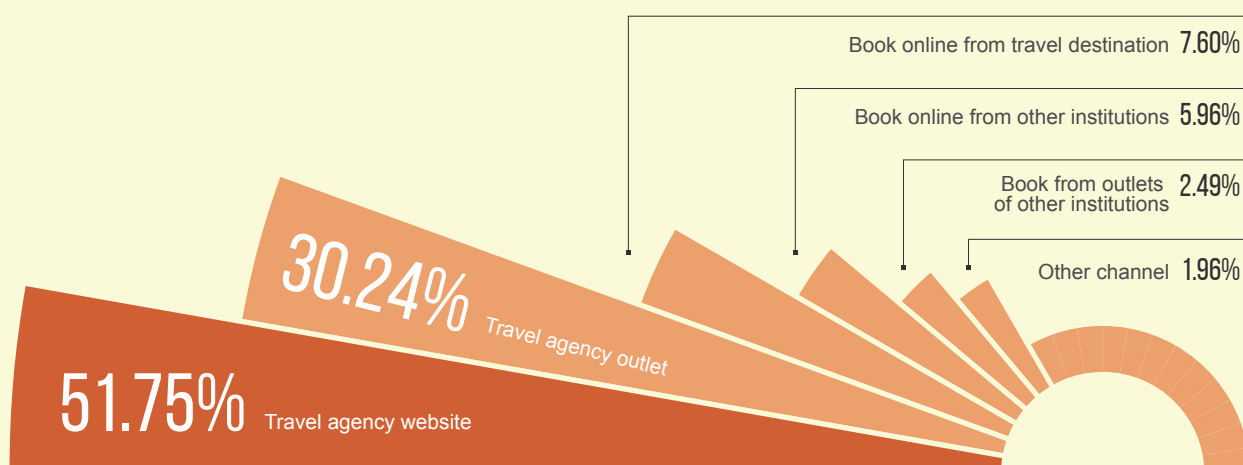
In terms of travel agencies, the top ten travel groups, i.e., CITS and cits.cn, CYTS and aoyou.com, China

Travel Service Head Office, Caissa Touristic, UTS, Springtour, CGZL, Ctrip were most chosen by Chinese outbound tourists.

Credibility, quality of local guides, travel schedule and tour programs of the travel agency were most concerned by Chinese outbound tourists.



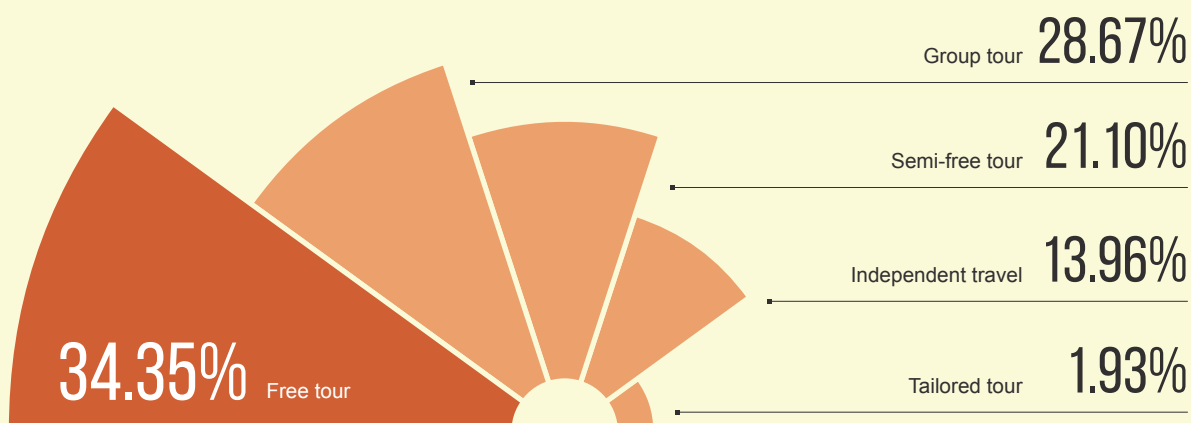
Chinese Outbound Tourists' Tour Booking Channels



Source: Ipsos



Chinese Outbound Tourists' Intentions for Future Travels



Source: Ipsos