

中国市场概览 China Market Overview



Tourism

Summary :

- The number of China's domestic outbound tourism has been rising while the number of foreigner's inbound tourism has remained in a steady level. Evidently, the foreign exchange of inbound tourism has kept rising, which indicates that inbound overseas tourists 's consumptive willingness and ability is being enhanced year-by-year.
- Overseas tourists acquire China's tourism information mainly from Internet. They prefer to obtain tourism information from search engines as well as the websites of airline corporations, hotels and travel agencies. About 60% of overseas tourists came to China in a self-guided way. In recent years, increasingly more overseas tourists choose to come to China in a customized way.

Summary :

- Due to the limited information channel and culture gap, overseas tourists respond entirely different before and after they come to China. The majority of concerns they have before they come to China become satisfaction. Thus, China tourism destinations should be more open to international market, make more global tourists know about China, and become the bridge of communication and information.

Summary :

- In terms of outbound tourism, Chinese are more enthusiastic to such Asia Pacific destinations as HongKong, Taiwan and Thailand. Compare to the previous years, Chinese willingness and capability in overseas consumption are promoted in these years.
- Regarding to information channels, Chinese prefer to obtain outbound tourism information from friends and travelling guides. However, among the common used channels, Chinese are more likely to have trust in online review websites as well as the suggestions and opinions from friends and relatives.
- Up to Q2 2015, London, Bangkok, Paris and Dubai appeared to be more popular among worldwide travelers. Asia Pacific destinations are welcomed by travelers.

Summary :

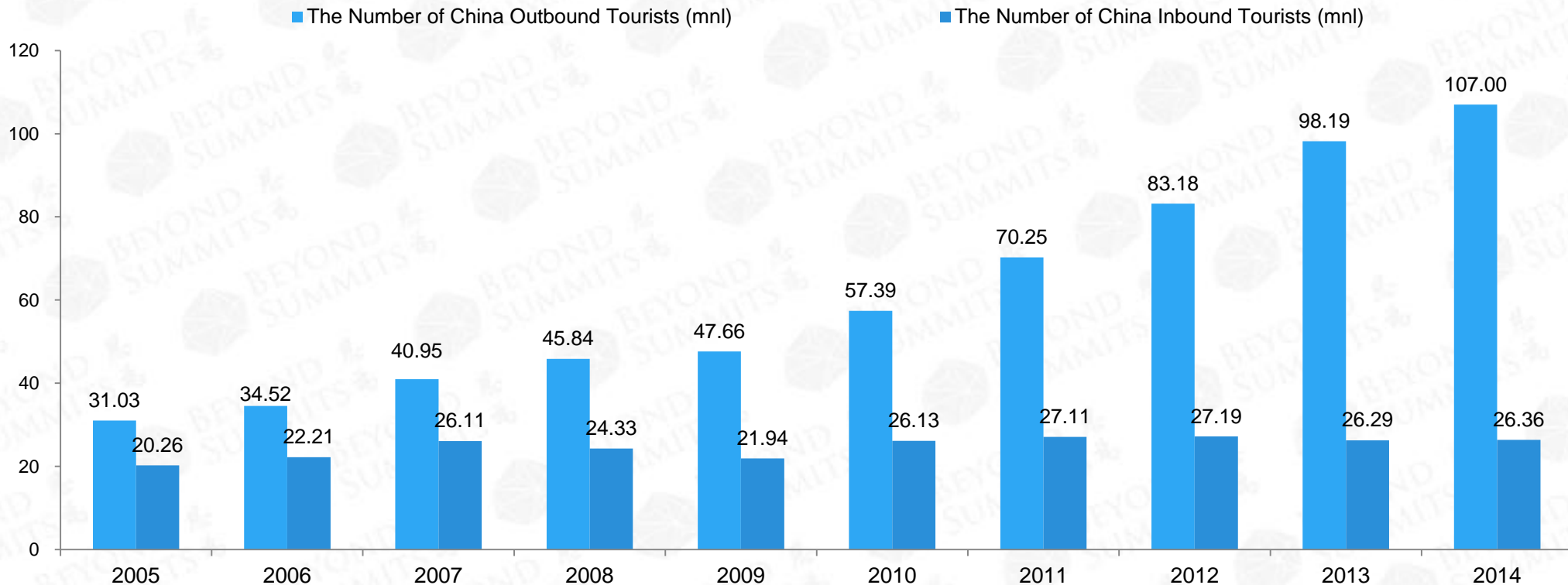
- In 2014, domestic rich people had higher frequency in conducting business trips. Almost one third of time is spent on business trips every month. However, compared to 2013, rich people have fewer number of outbound tourism in 2014. One fourth of total number of tourism made by rich people in 2014 is outbound tourism.
- Medium to short distance traveling is welcomed by rich people. They spend 5-8 days, on average, in each trip. Their spending behavior appeared to be rational. The cost of each outbound trip was USD5500 per capita (flight tickets cost were not included).

Summary :

- In 2014, the most and second most important purposes of rich people's outbound tourism are sight-seeing and shopping relatively. Hence, shopping, sight-seeing and experiencing local culture are major arrangements in rich people's outbound trips.
- On one hand, Sanya, Hongkong and Yunnan-Tibet passageway were domestic tourism priorities among Chinese rich people in recent years. On the other hand, Australia, France and Dubai were welcomed by Chinese rich people and became major outbound destinations.

The number of China outbound tourists has been increased while the number of inbound tourists has almost maintained at the level of 26 million foreigners.

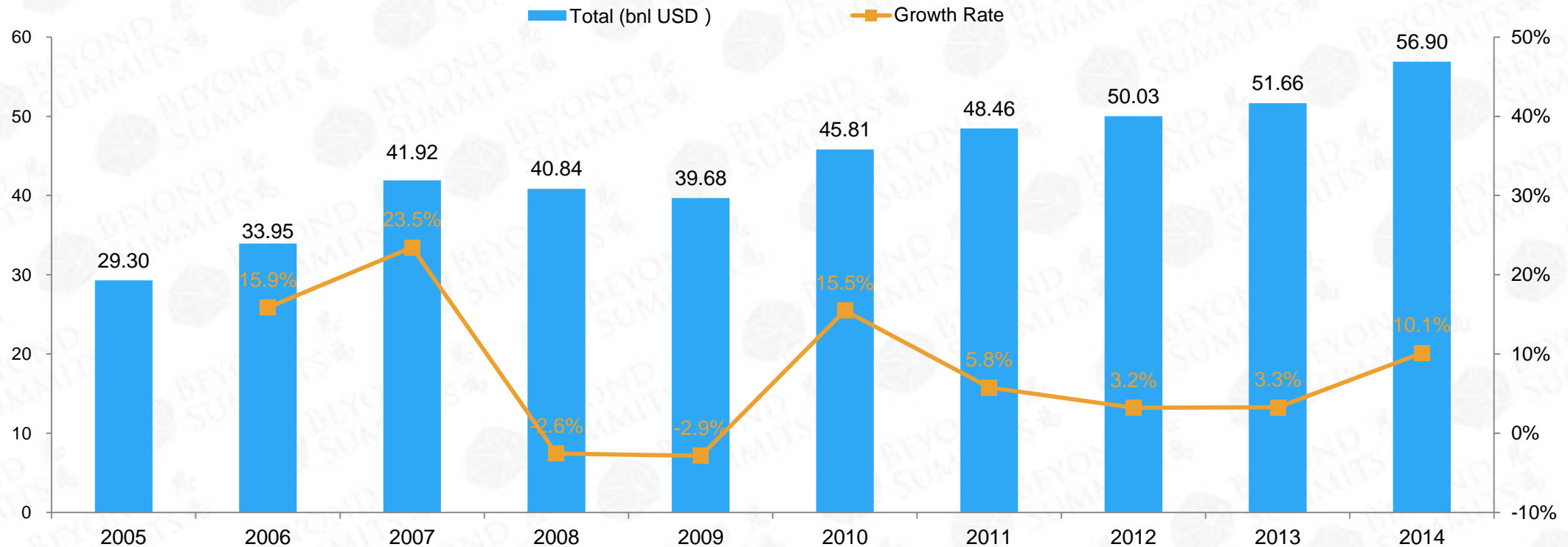
The Number of Tourist for China Outbound Tourism in Past 10 Years



Source : China National Tourism Administration(CNTA), *Yearbook of China Tourism Statistics 2007- 2009*
 Department of Policy and Legal Affairs for CNTA

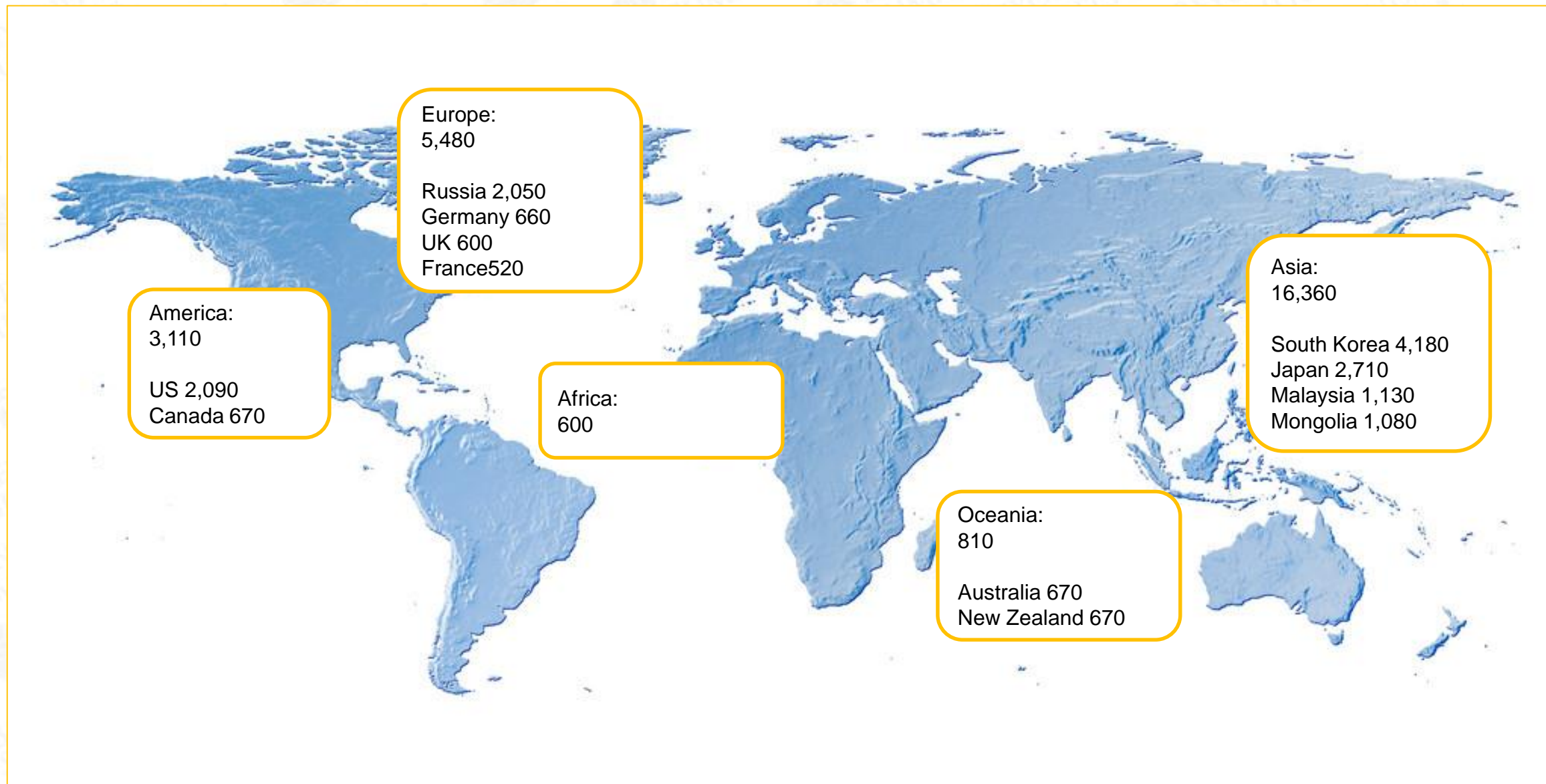
China international tourism foreign exchange revenue has been increasing for years. Tourism receipts in 2014 has risen 10% and the growth rate is expected to be higher in 2015.

The Foreign Exchange of China Inbound Tourism in Last 10 Years



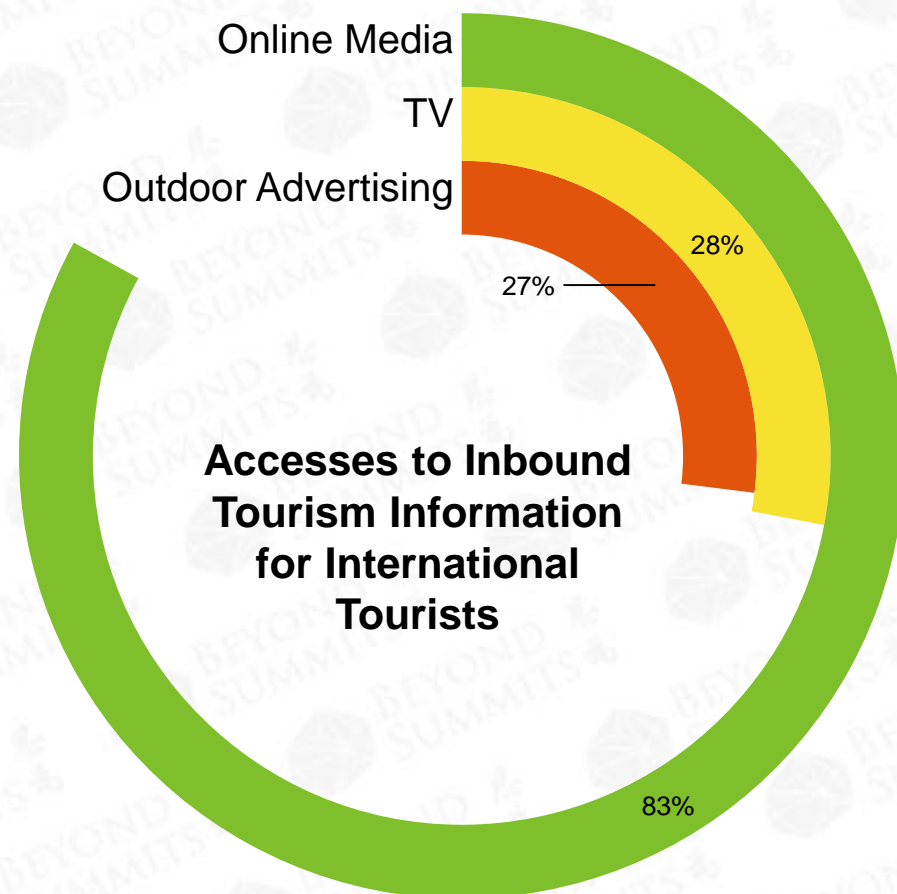
Source : China National Tourism Administration(CNTA), *Annual Report of Tourism Development 2015*

Foreign Visitor Arrivals by Destination (2014) (ths Person)

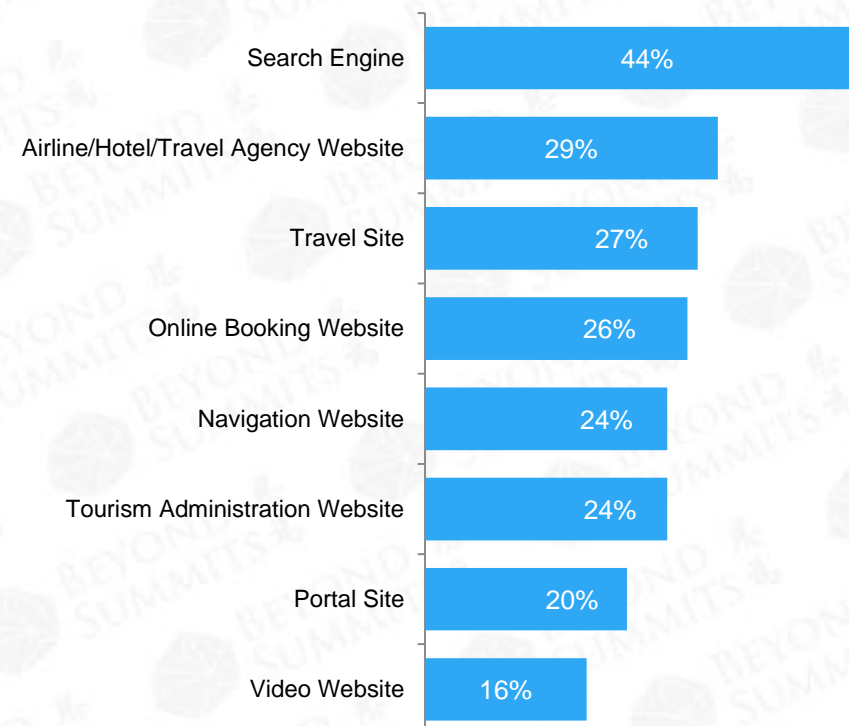


Source : China National Tourism Administration(CNTA), *Yearbook of China Tourism Statistics 2014*

International tourists access travel information via online approaches such as search engines and airline/hotel/travel agency websites.



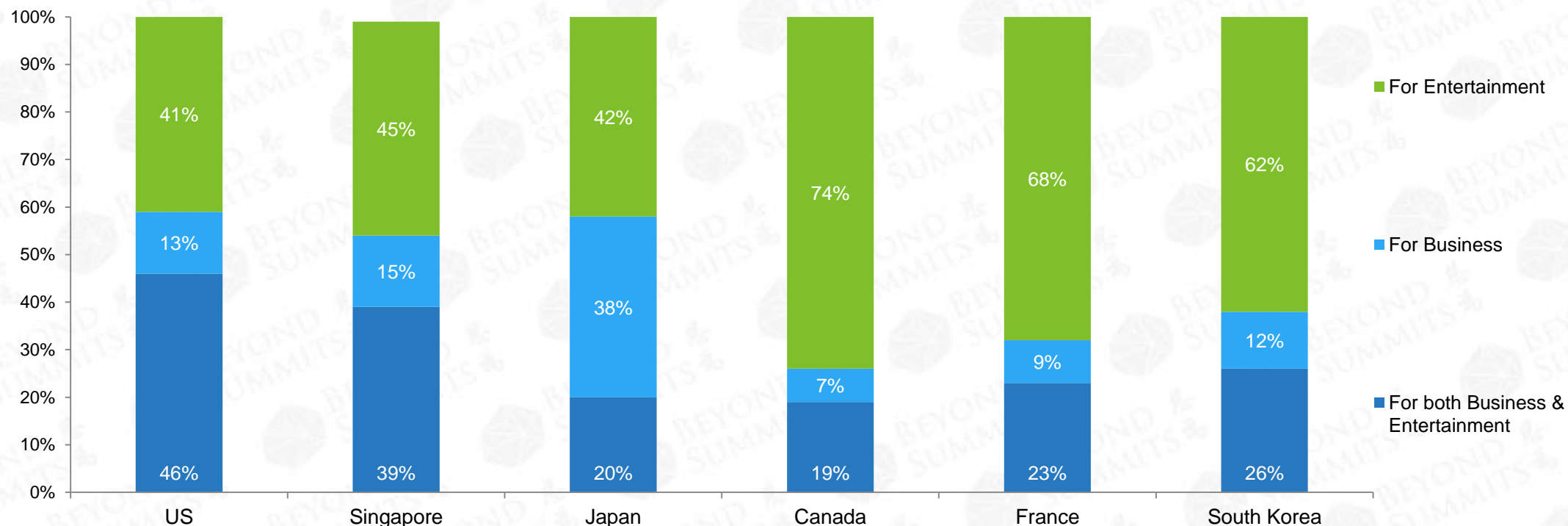
Online Approaches to Inbound Tourism Information for International Tourists



Source : Google & Millward Brown, *China Inbound Tourists' Behaviours and Attitudes Report*

The more advanced the country's commercialization is, the higher the proportion of business trip in inbound travel is. Tourists from countries such as Canada, France and South Korea seek entertainment and leisure in China.

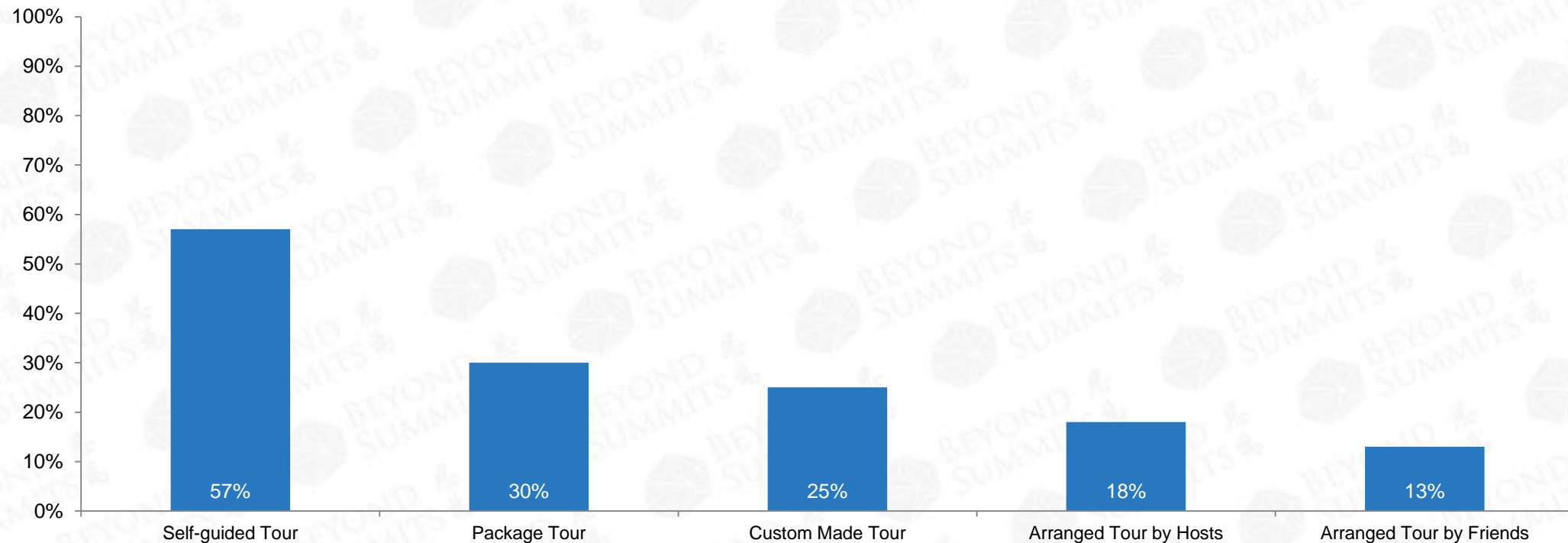
Purposes of Arrivals from Different Countries (2015)



Source : Google & Millward Brown, *China Inbound Tourists' Behaviours and Attitudes Report*

60% of inbound tourists choose self-guided tour to China, and self-guided tour has been popular for international tourists recently.

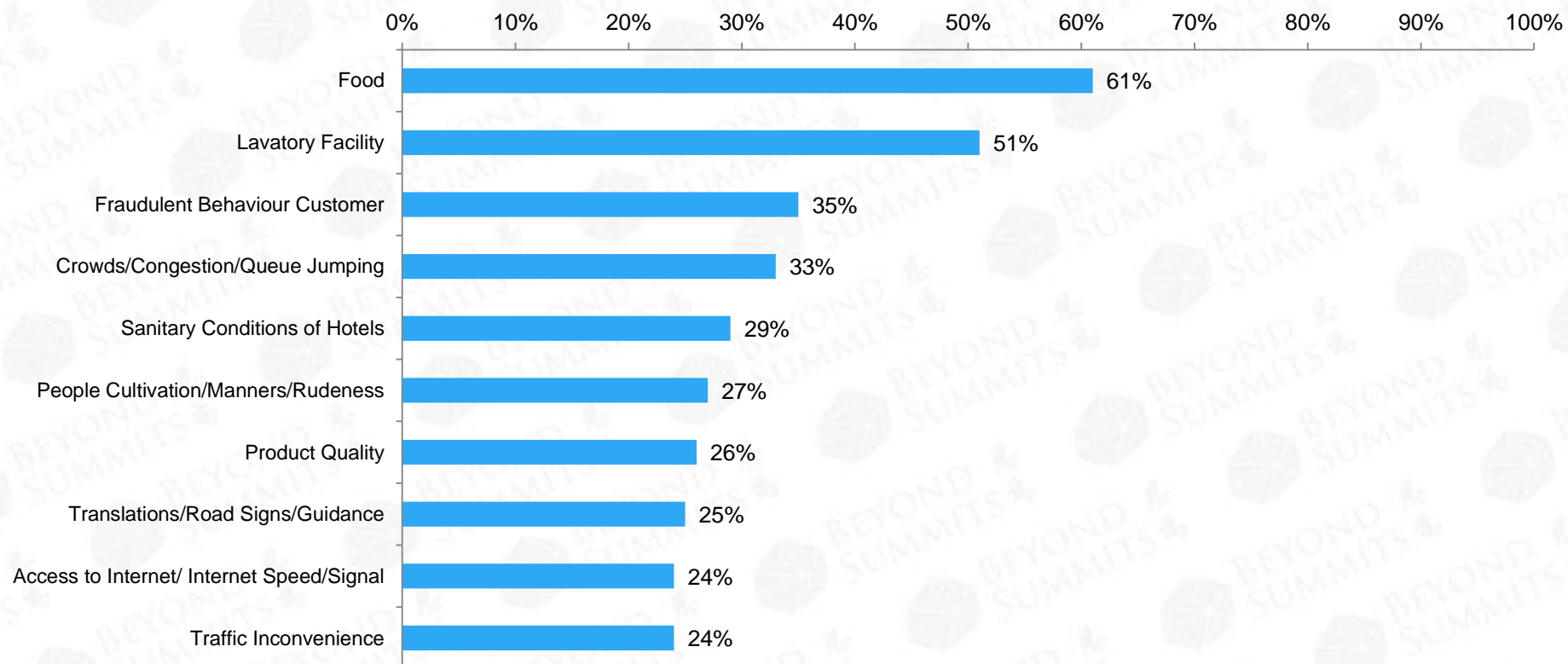
Travel Ways of China Inbound Tourists (2015)



Source : Google & Millward Brown, *China Inbound Tourists' Behaviours and Attitudes Report*

Inbound tourists mainly concerns about food and lavatory conditions when traveling around China.

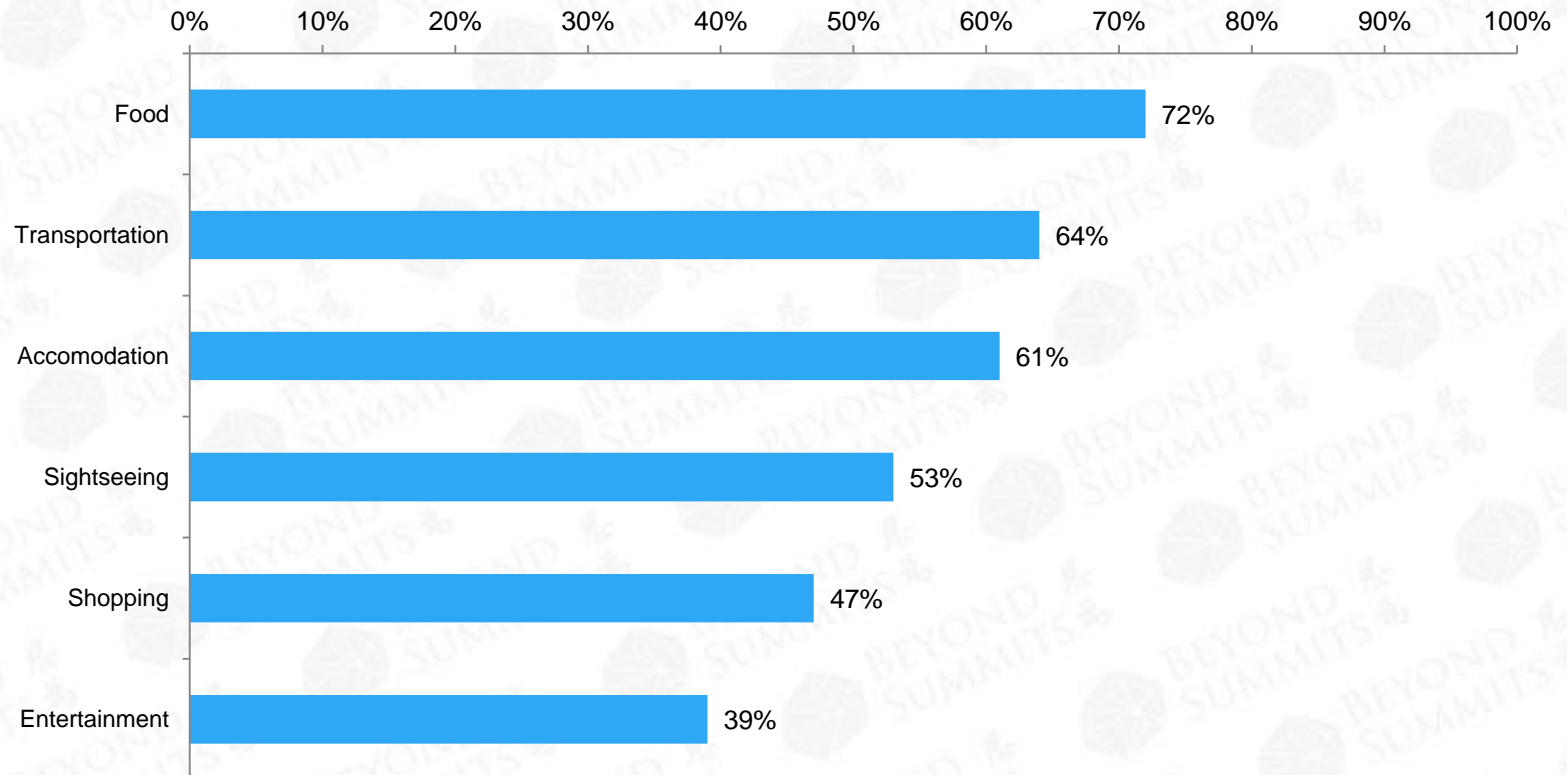
Concerns from China Inbound Tourists (2015)



Source : Google & Millward Brown, *China Inbound Tourists' Behaviours and Attitudes Report*

After traveling around China for a while, international travelers change their perception and feel satisfied about food, transportation and accommodation in China.

Satisfaction of China Inbound Tourists (2015)



Source : Google & Millward Brown, *China Inbound Tourists' Behaviours and Attitudes Report*

Facebook 上被提及最多的10大中国城市:

Top 10 Mentioned Chinese Cities on Facebook

北京	Beijing
上海	Shanghai
杭州	Hangzhou
成都	Chengdu
深圳	Shenzhen
南京	Nanjing
青岛	Qingdao
西安	Xi'an
重庆	Chongqing
武汉	Wuhan

Facebook 用户最终前往的10大中国景点:

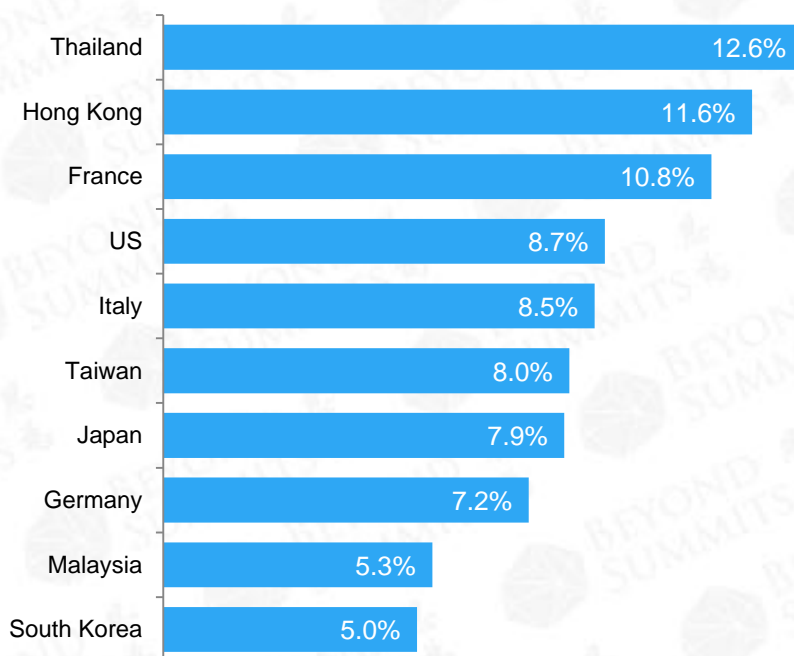
Top 10 China Travel Destinations of Facebook Users

张家界	Zhangjiajie
丽江	Lijiang
九寨沟	Jiuzhagou Valley
峨眉山	Mount Emei
三峡	The Three Gorges
长隆	Chimelong
华山	Hua Mountain
西湖	West Lake
长城	The Great Wall
少林	Shaolin

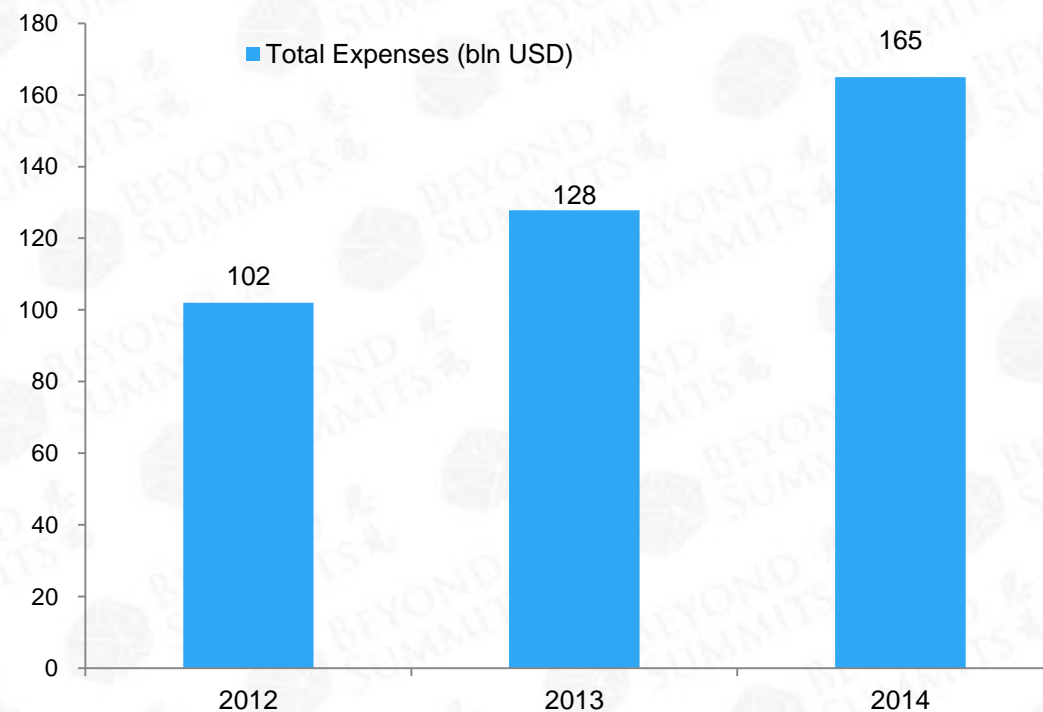
Source : Facebook

Chinese tourists prefer to travel in Asia such as Thailand, Hong Kong and Taiwan. When traveling, Chinese tourists tend to spend more money.

Top 10 Self-guided Outbound Destinations (2014)



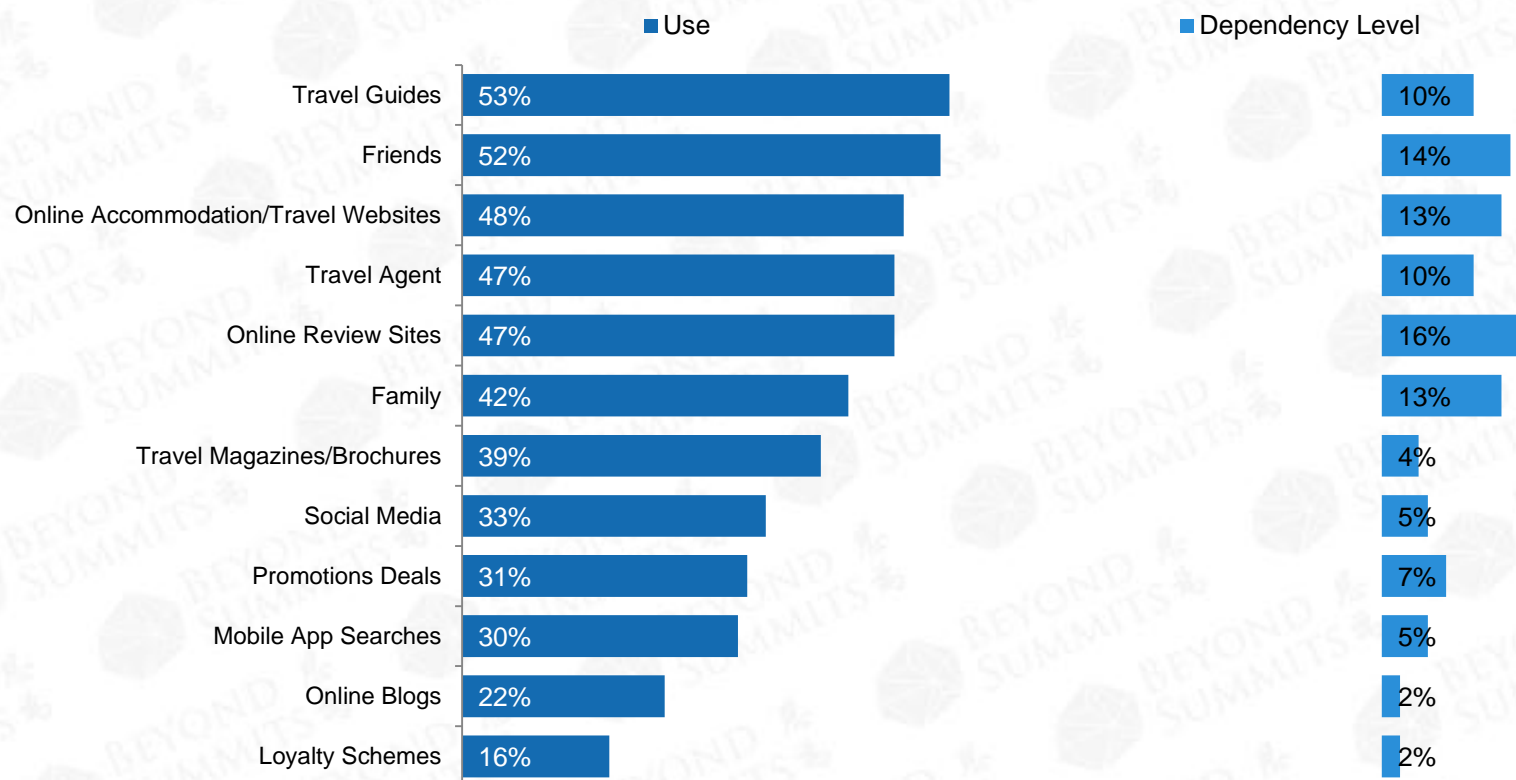
Total Outbound Travel Expenses



Source : Qyer, *Self-guided Outbound Tourism 2014*; World Tourism Cities Federation, *China Outbound Tourists Expense Report*

Chinese prefer to acquire travel information from travel guides and friends, but they have more trust in review websites, friends and relatives' recommendations.

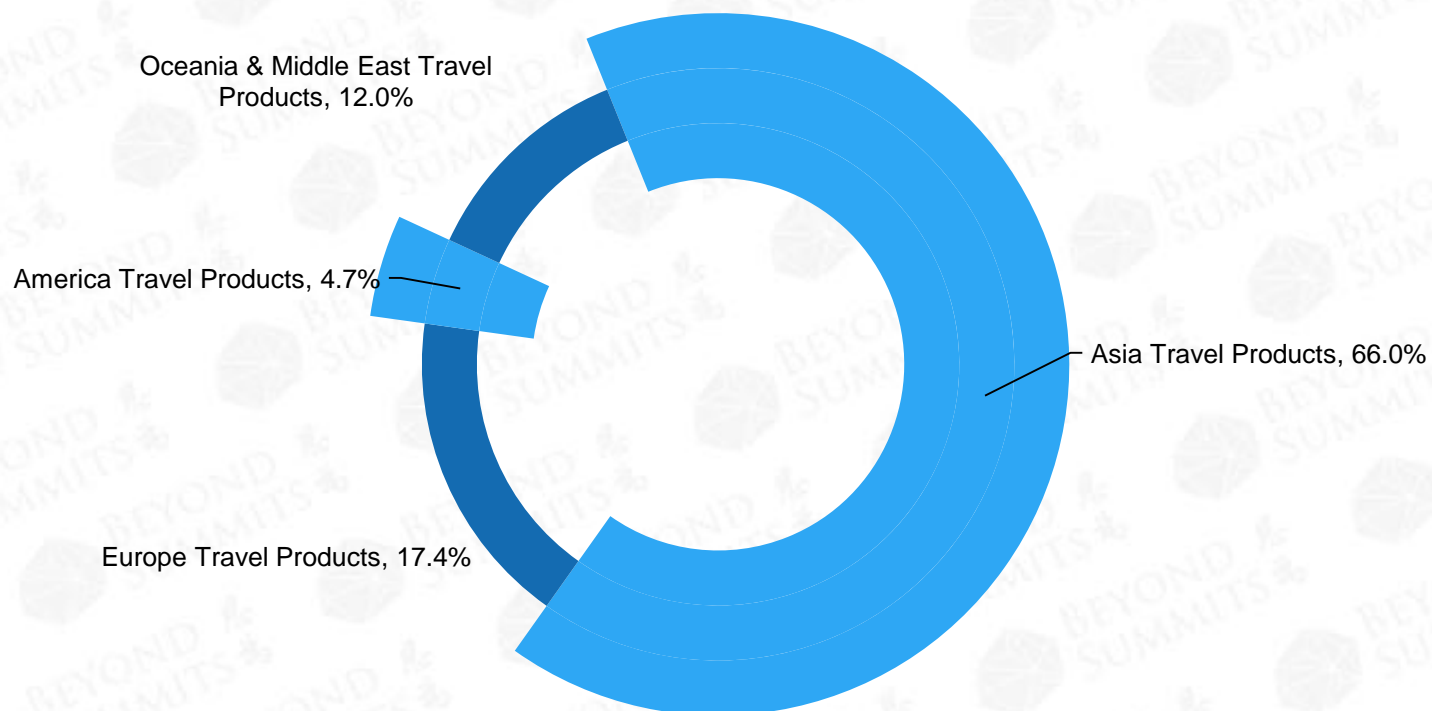
Sources of Outbound Travel Information for Chinese (2014)



Source : CITM

At the start of summer holiday, outbound travel products became more various in the third quarter of 2015. In July 2015, there are 220,000 detected travel products, mainly Asian ones.

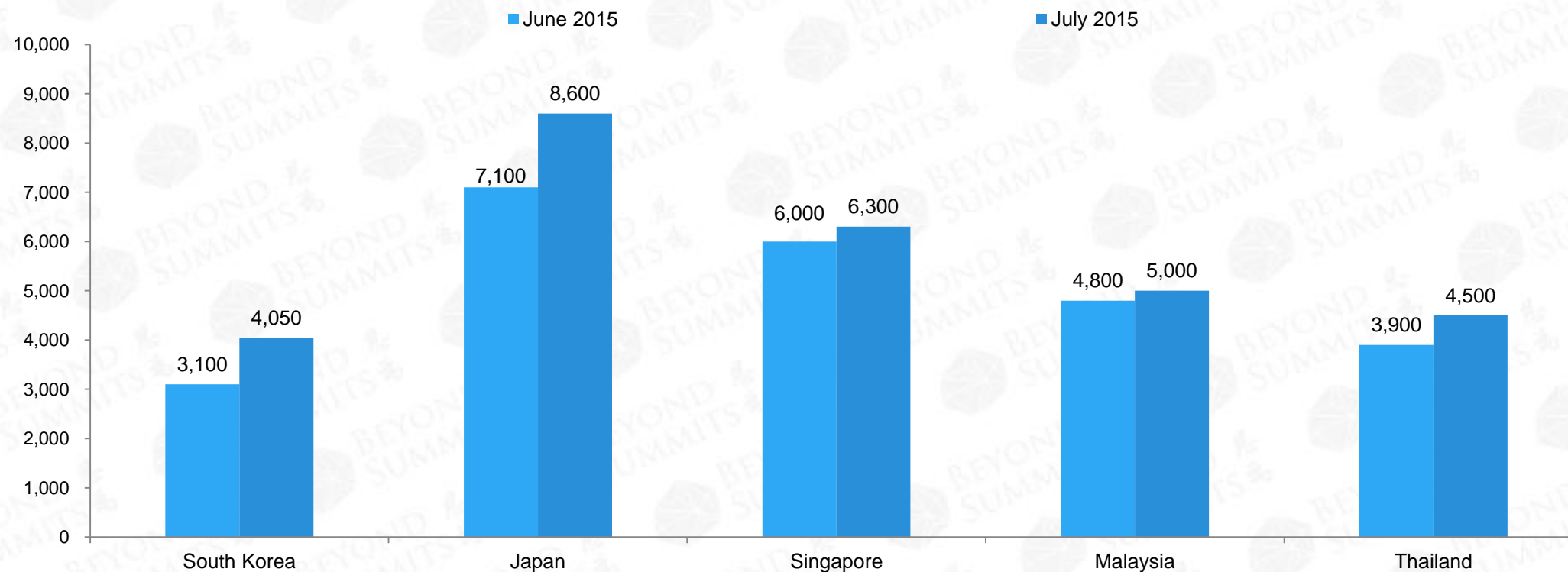
Outbound Travel Product Structure (2015 Q3)



Source : Ivy, *China Outbound Tourism Report 2015Q3*

For Asia travel destinations near China, Japan is the most expensive country while the travel expense of South Korea is competitive. As a competitive tourism market, Southeast Asia has its traditional travel routes. Hence, its prices haven't changed much during summer holiday of 2015.

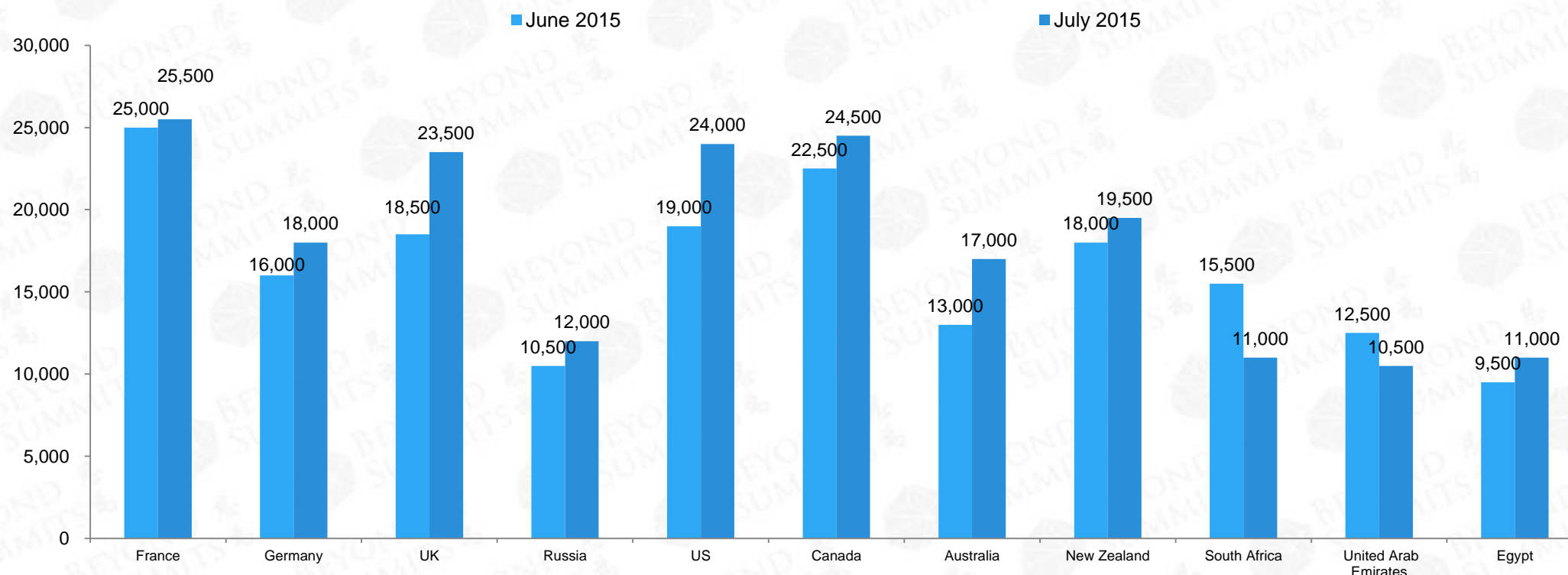
Prices of Inbound Travel Products for Asia



Source : Ivy, *China Outbound Tourism Report 2015Q3*

The average prices of long-distance travel products for Europe, America, Oceania and Middle East are over 10,000RMB in July 2015. Package tours to France are most expensive, and prices of package tours to US, Canada and UK are over 20,000RMB. By contrast, prices of package tours to South Africa, United Arab Emirates and Egypt are relatively low.

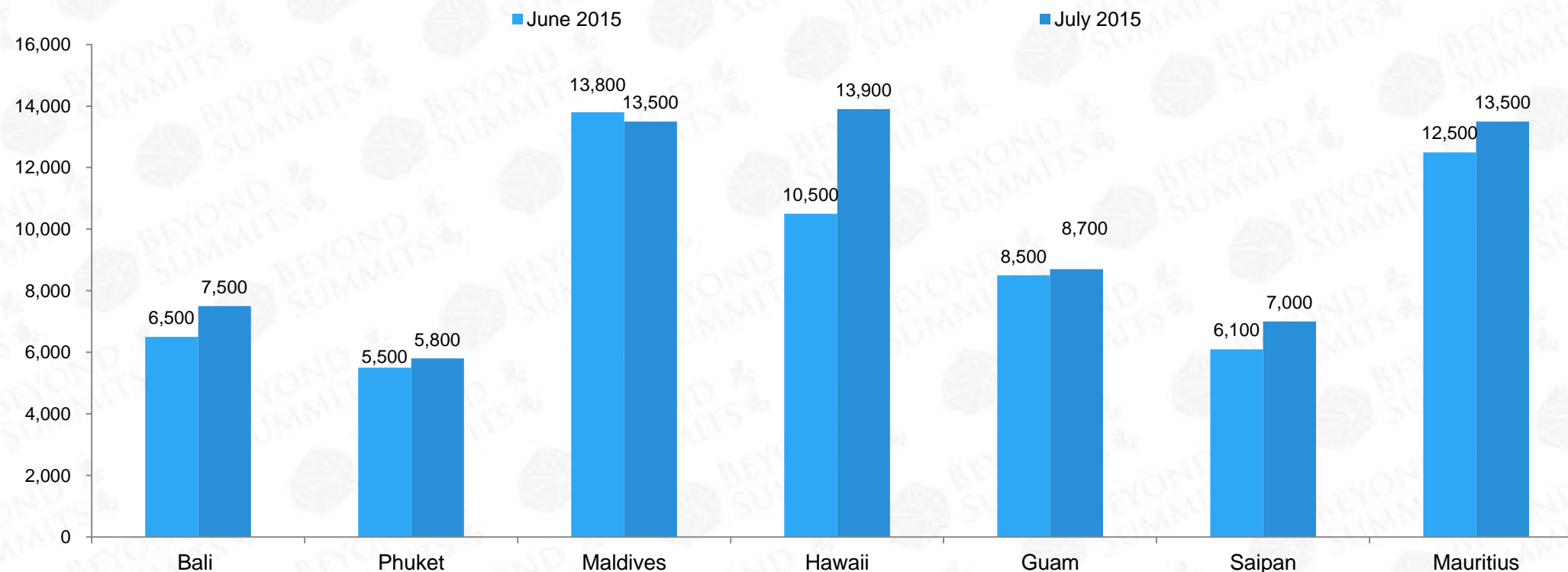
Prices of Inbound Tourism Products for Long-distance Destinations (2015)



Source : Ivy, *China Outbound Tourism Report 2015Q3*

Prices of island travel products increased during summer holiday in 2015. Prices of Asian island travel products has increased 15% in July 2015. For islands far from China, prices of their travel products have risen slightly except Hawaii had 30% increase.

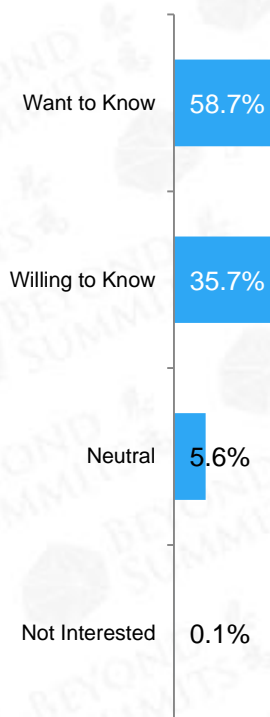
Average Prices of Island Travel Products of Package Tour (2015)



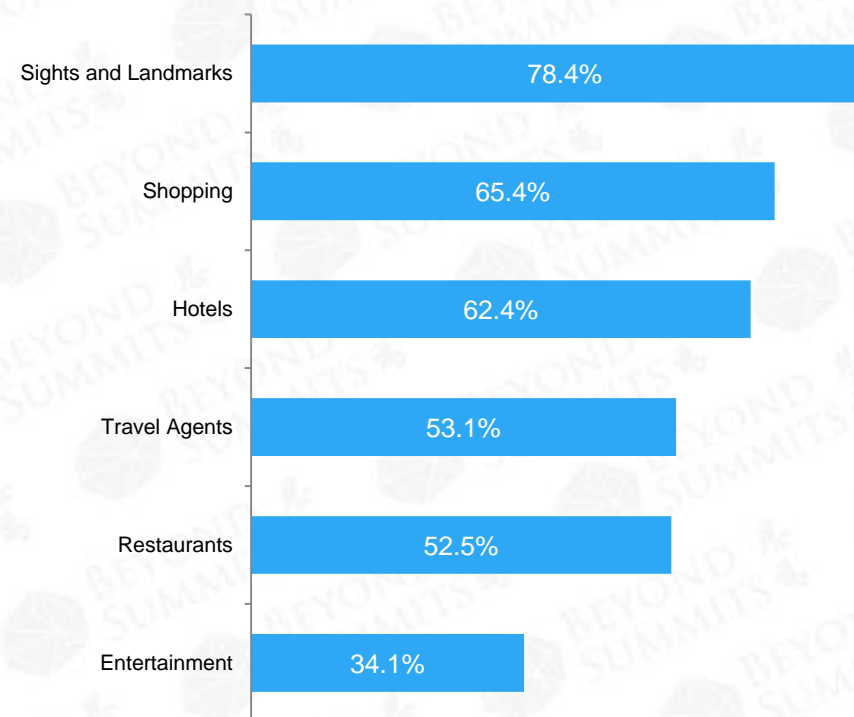
Source : Ivy, *China Outbound Tourism Report 2015Q3*

94% respondents indicated their interest in knowing good outbound tourism suppliers like restaurants and travel agencies, which are evaluated and certificated by professional organizations, and they think this kind of information will be helpful for their outbound travel.

The Will of Chinese Tourists to Know Outbound Travel Suppliers (2015)



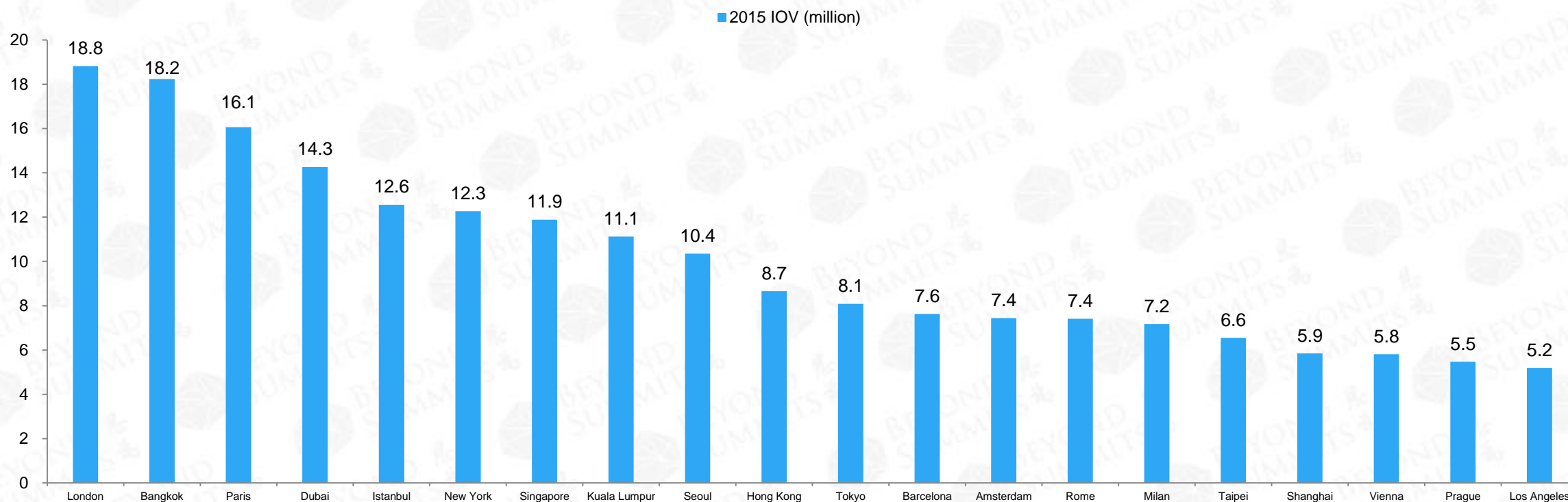
The Types of Outbound Travel Suppliers Chinese Tourists Followed (2015)



Source : Ivy, *China Outbound Tourism Report 2015Q3*

In 2015, global tourists love to travel to London, Bangkok, Paris and Dubai. And Asia became a hot travel destination.

Top 20 Global Destination Cities by International Overnight Visitors (2015)

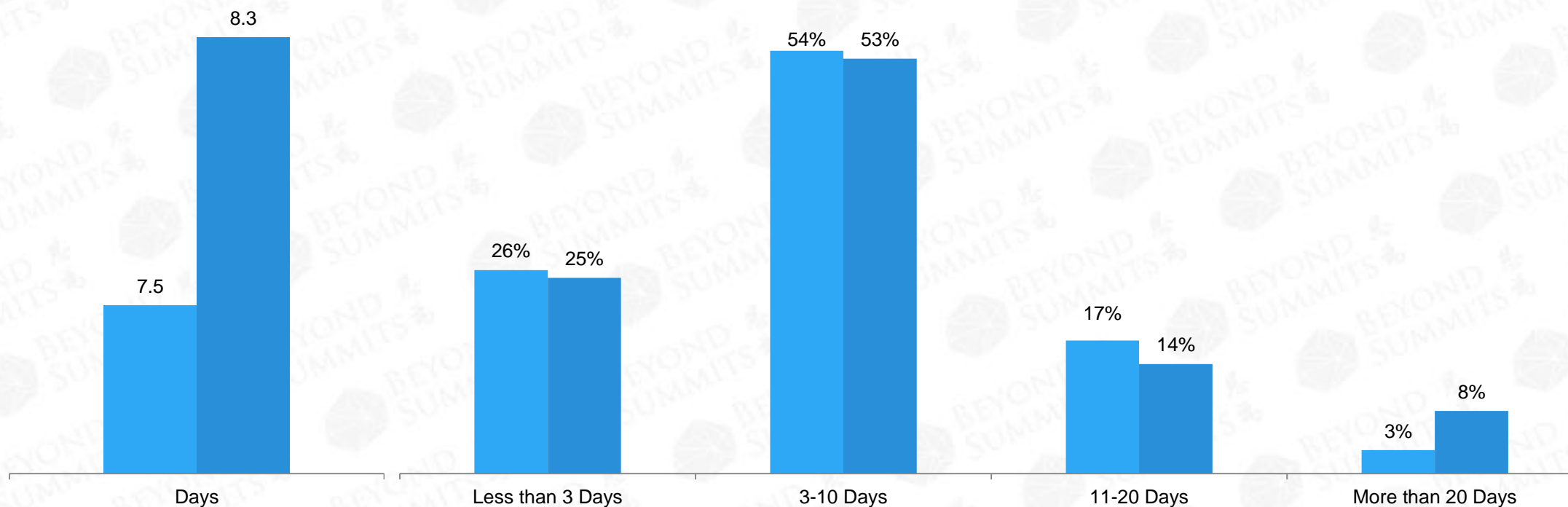


Source : MasterCard, *Global Destination Cities Index*

Business trips of the rich in 2014 is of high frequency about 8.3 days per month, 0.8 more days than last year. The percentage of business trip over 20 days has increased from 3% to 8% this year. Most visited cities among the rich are Hong Kong, Shanghai, Beijing, Sanya and Hangzhou.

Days for Business Trip per Month

■ 2013 ■ 2014



Frequency of Business Trip for the Rich per Month (2014)

■ 2013

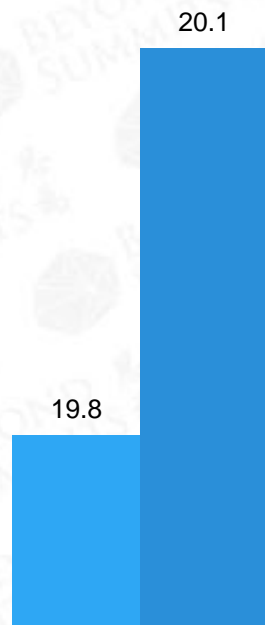
■ 2014

Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

Average vacation of the rich was 20 days per year in last two years, 9 more days than national holidays, while the frequency of going abroad has decreased to 2.1 times. The rich has traveled 4 times in 2014 averagely, composing 3 domestic trips and 1 outbound trip.

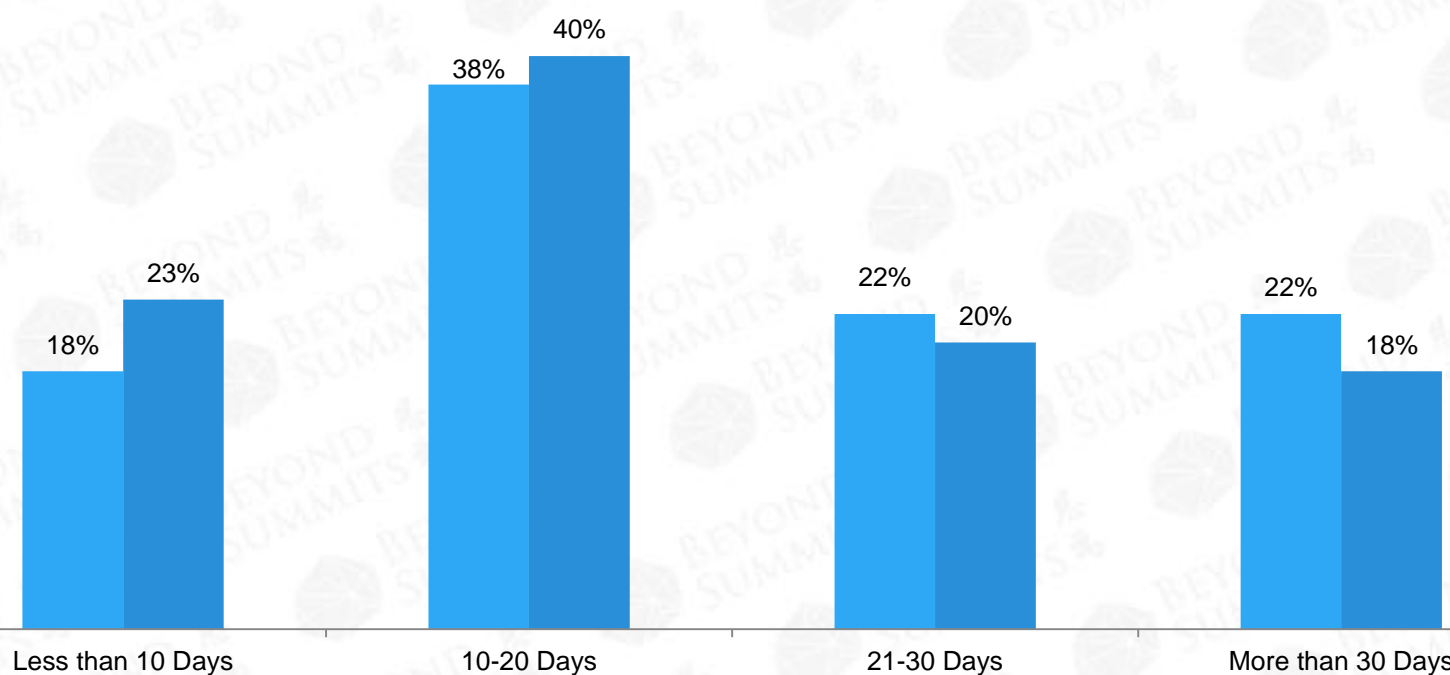
Average Vacation Days per Year

■ 2013 ■ 2014



Average Vacation Days per Year for the Rich (2014)

■ 2013 ■ 2014

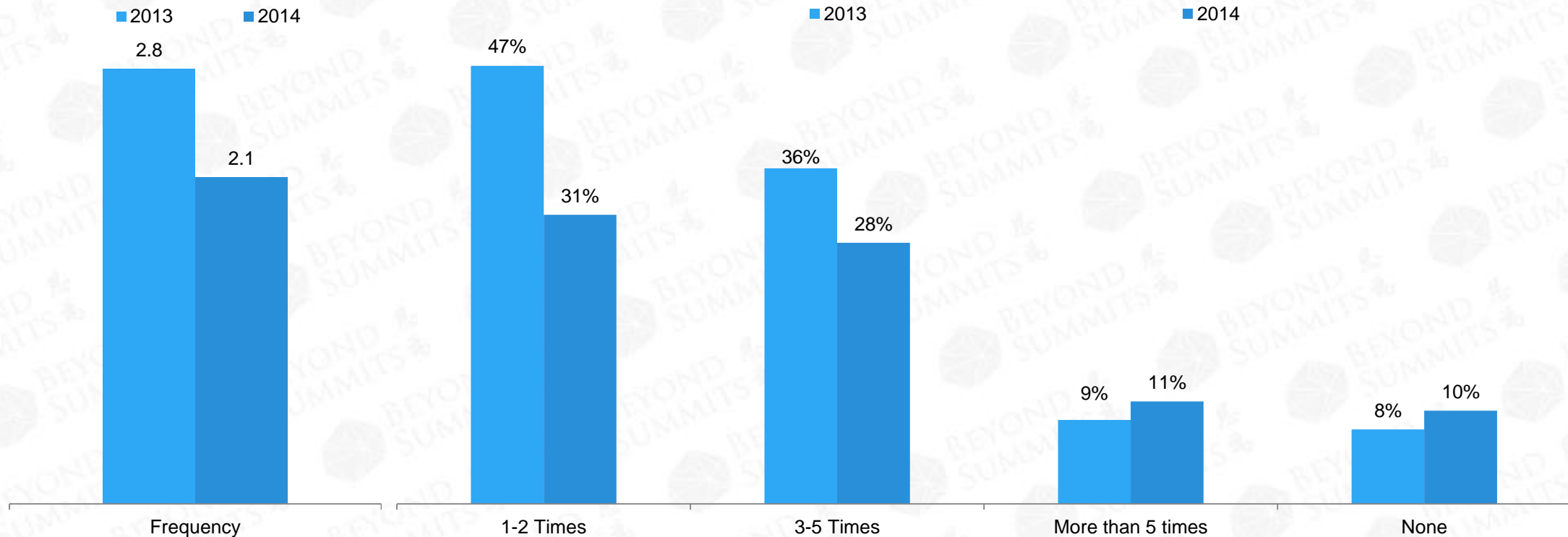


Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

Frequency of going abroad for the rich in 2014 is lower than the frequency in 2013, and the number of people who went abroad 1-2 times in 2014 has reduced compared with 2013.

Frequency of Going Abroad
per Year

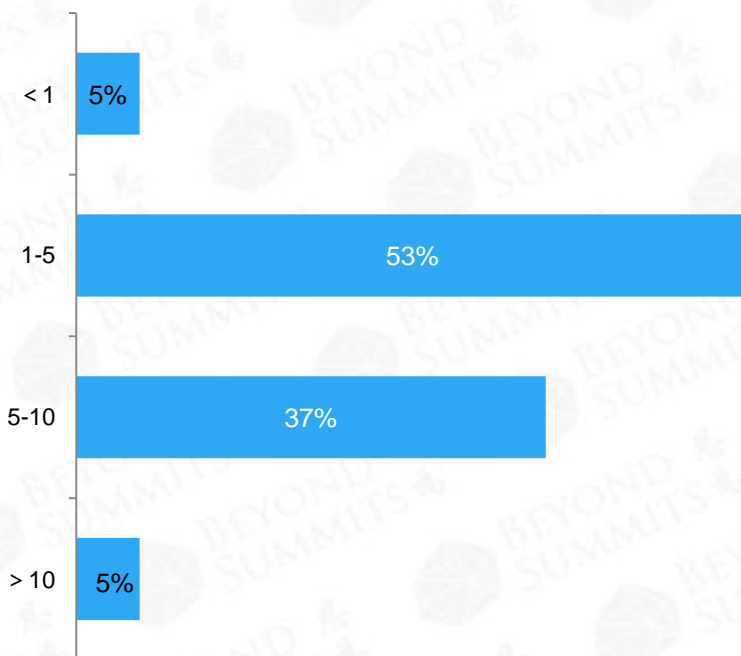
Frequency of Going Abroad for the Rich per Year (2014)



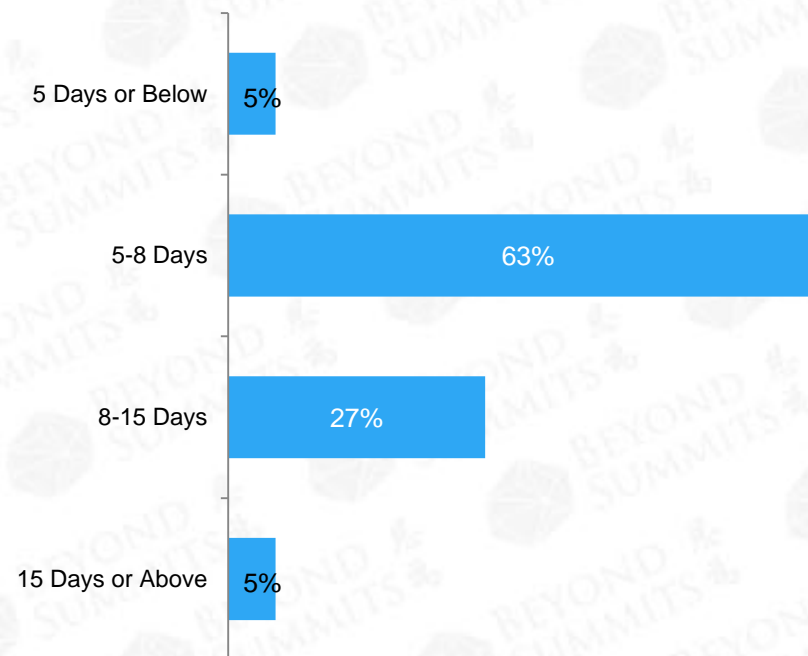
Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

The rich travels abroad for 5 to 8 days on average in 2014, and over half of them spent less than 5 thousand USD for outbound travel.

Average Expenses of Outbound Travel for the Rich Without Flight Ticket (2014)
(th\$ USD)



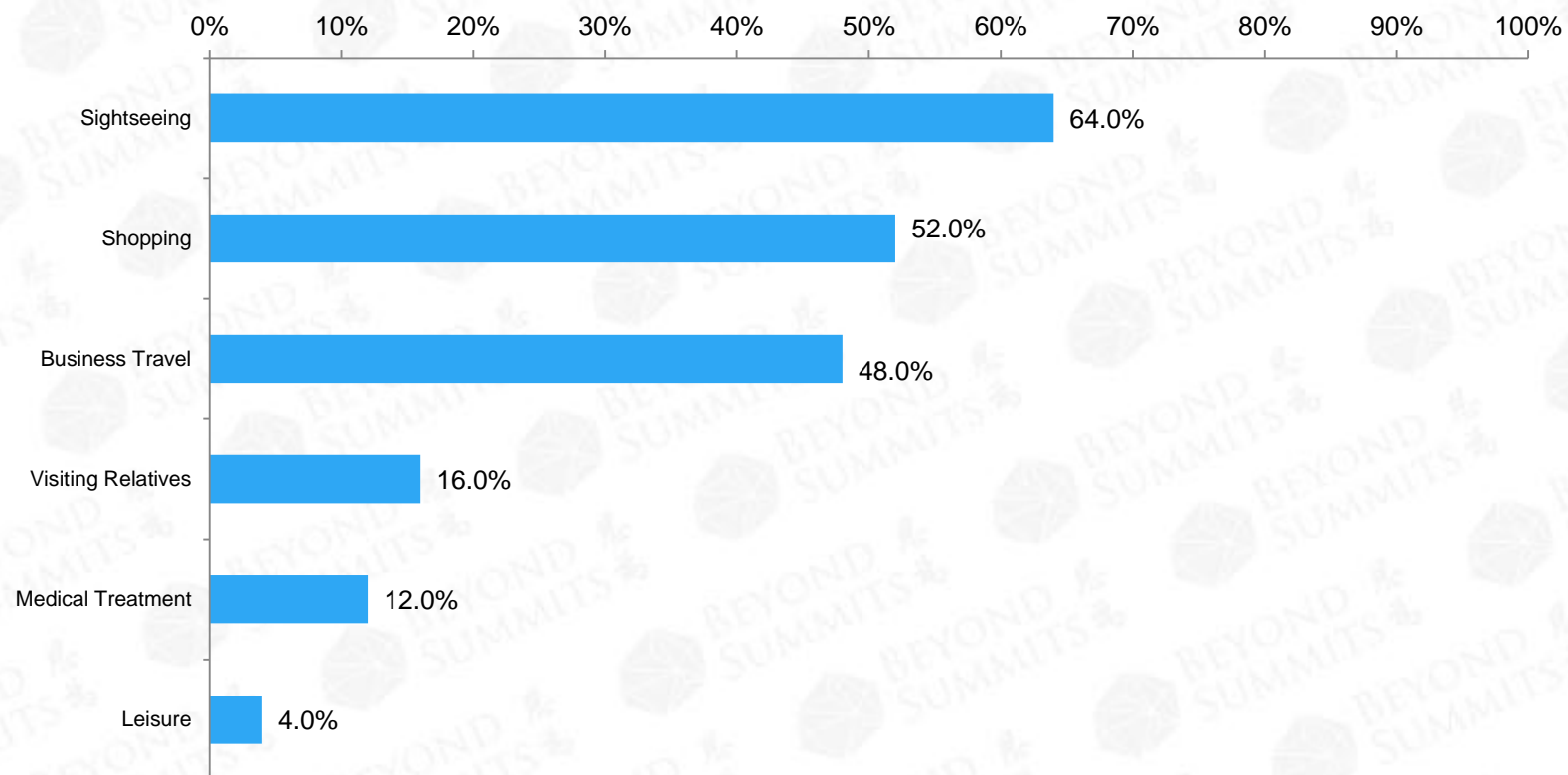
Average Days of Outbound Travel for the Rich (2014)



Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

Top three purposes of outbound travel for the rich in China are sightseeing, shopping and business trip. Korea has become the new destination for outbound shopping tourism. Business travel ranked 3rd of outbound travel destination for the rich.

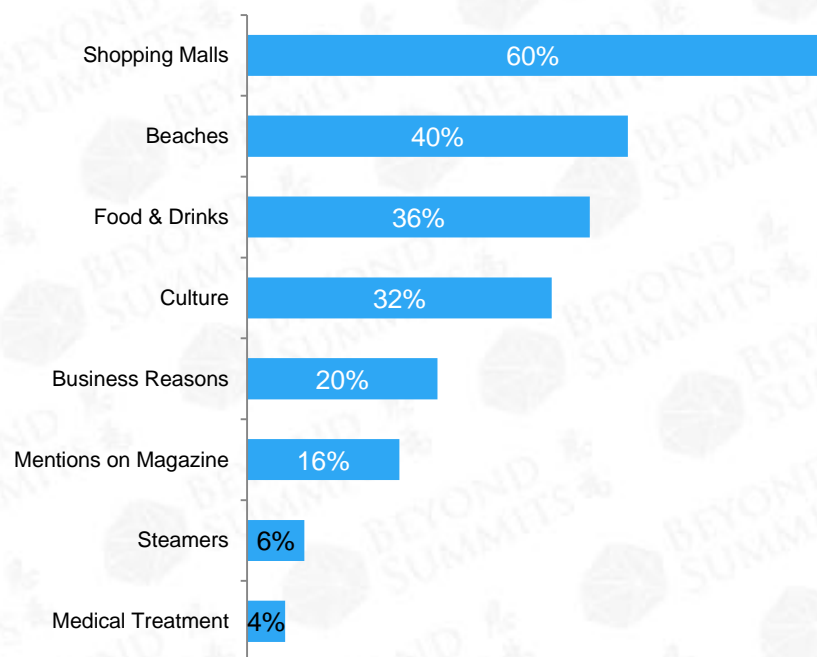
Outbound Travel Destination for the Rich in China (2014) (%)



Source : Hurun & ILTM, *China Outbound Travel Agents Research 2014*

Outbound travels for the rich is mainly about going shopping, enjoying local sights and experiencing local culture in 2014. The rich concern about location, facilities when reserving hotels.

Considerations for Outbound Travel Arrangement (2014)



Primary Considerations when the Rich Book Hotels

1	2	3
Location	Brand	Price

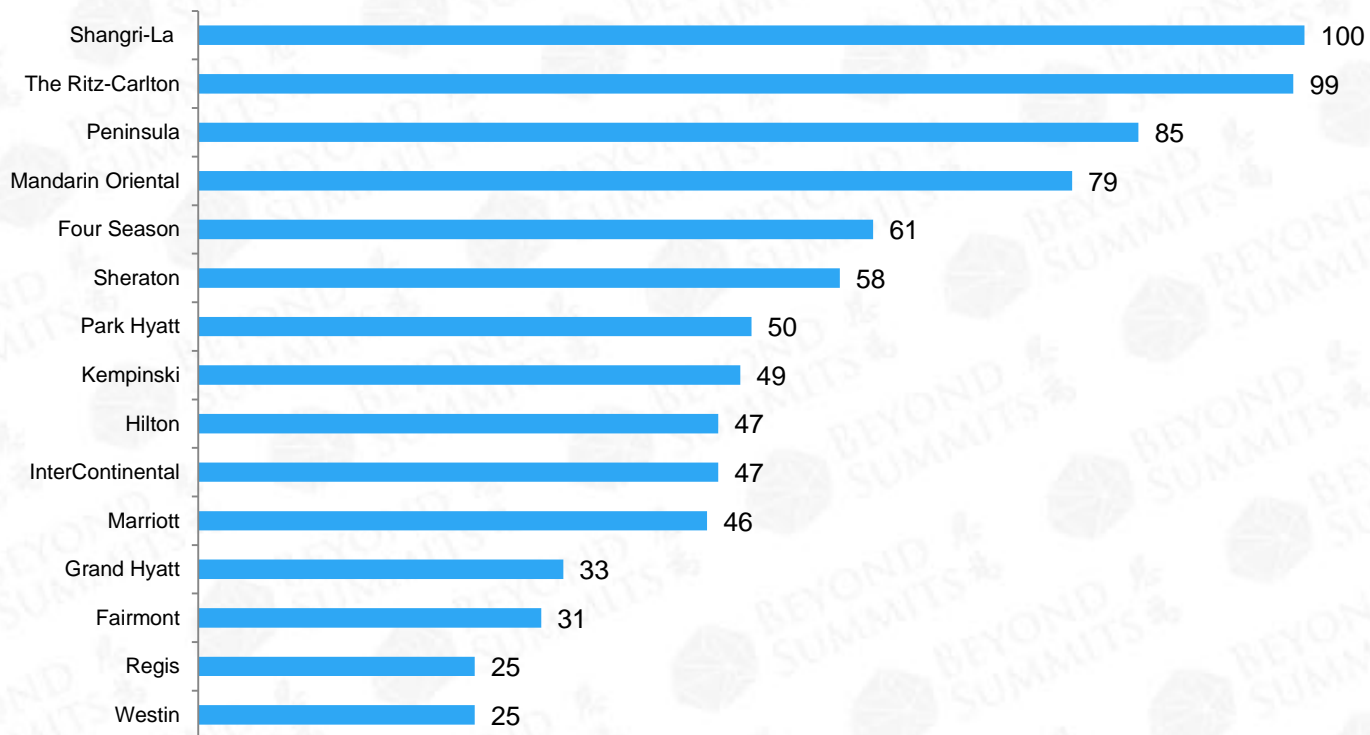
Overall Considerations when the Rich Book Hotels

A	B	C
Facility	Restaurant	Service

Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

Shangri-La and the Ritz-Carlton are the rich's two favorite hotel brands in 2015.

Top 15 Hotel Brands Favorite by the Rich (2014)

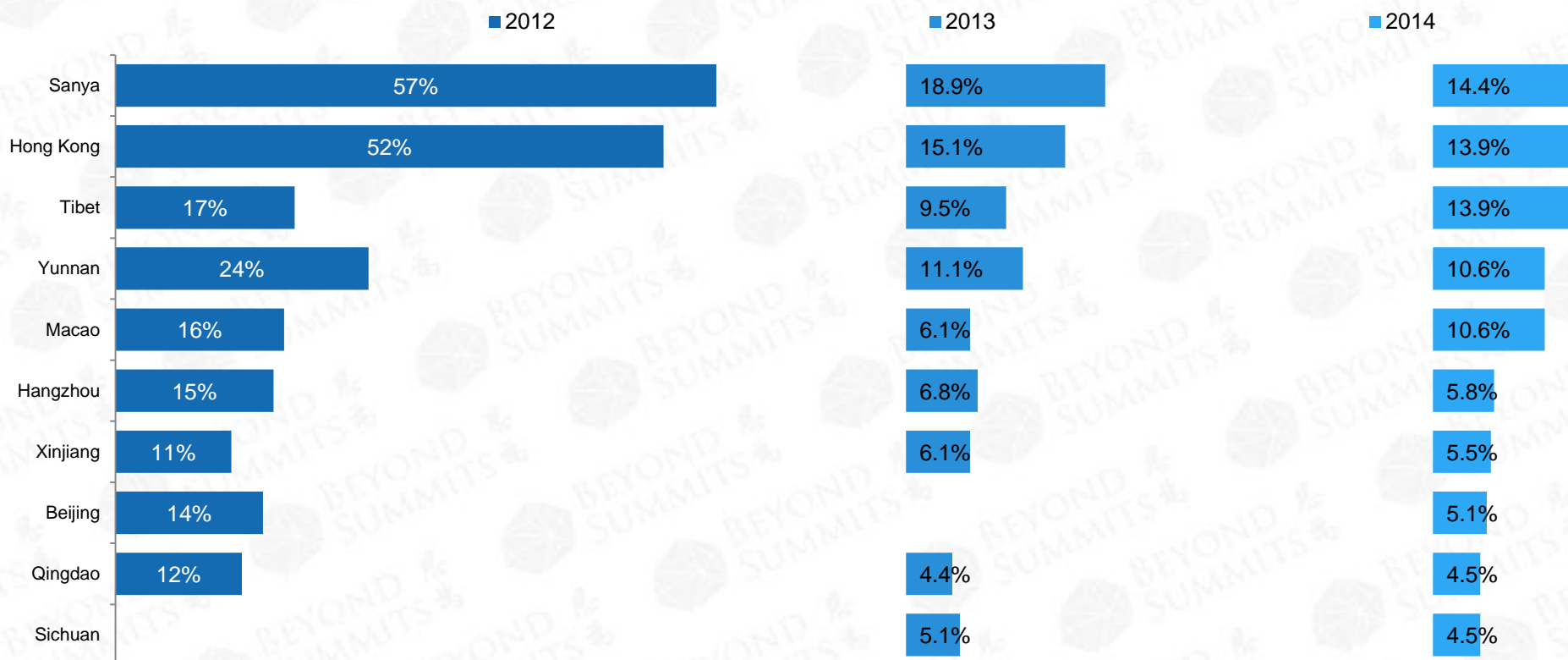


Calculating Method: Based on the percentage of favored hotels. Total score is 100, and the higher, the more favored.

Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

Sanya, Hong Kong and Yunnan-Tibet Passage are the top 3 choices of domestic tourism destinations for the rich.

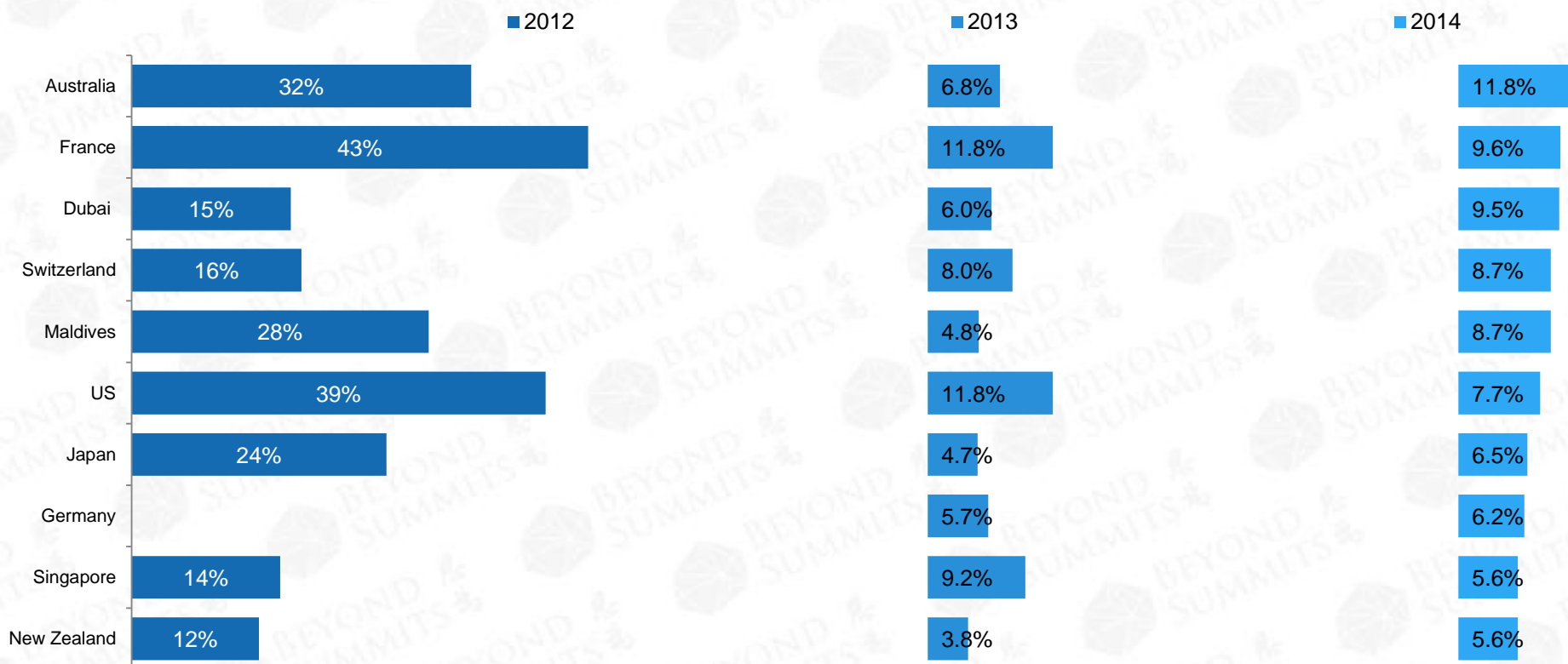
The Rich's favorite Domestic Tourism Destinations in Past 3 Years



Source : Hurun, *The Chinese Luxury Traveler White Paper 2014*

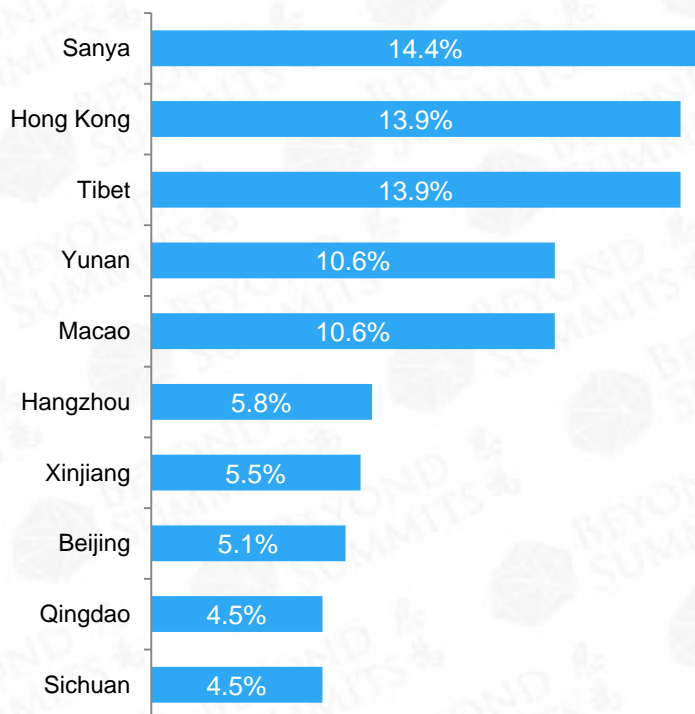
In recent years, Australia, France and Dubai have become popular as international tourism destinations for the rich in China.

The Rich's favorite International Tourism Destinations in Past 3 Years

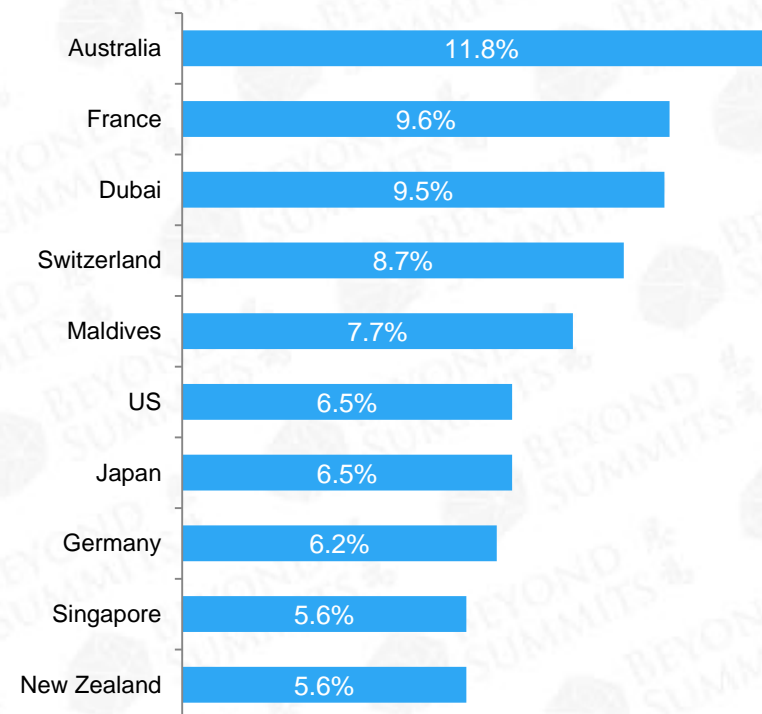


Source : Hurun, *The Chinese Luxury Traveler White Paper 2014*

Top 10 Domestic Tourism Destinations for Millionaires (2014)

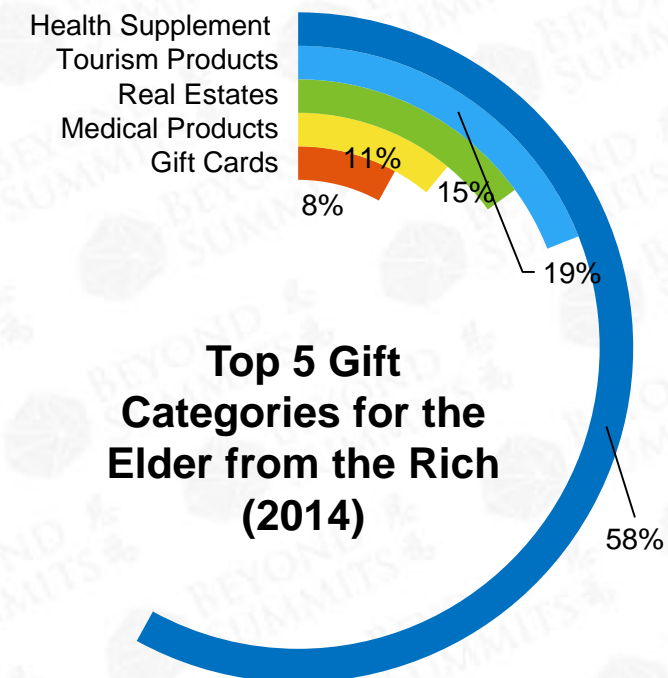
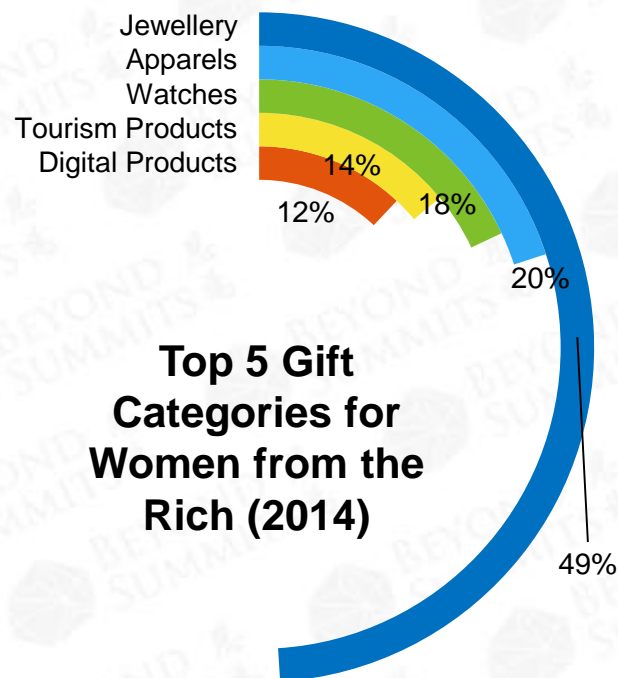
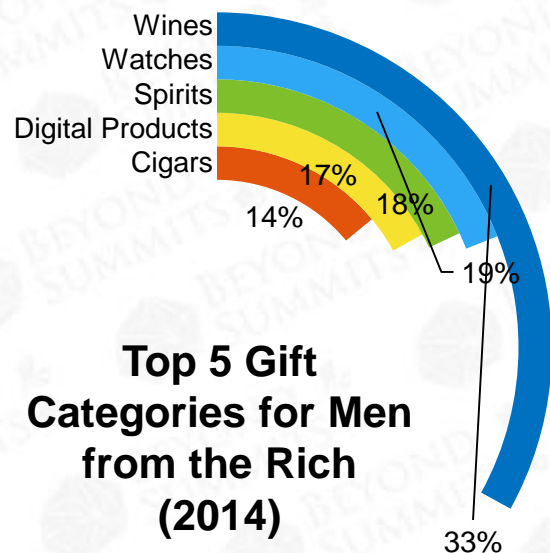


Top 10 Outbound Tourism Destinations for Millionaires (2014)



Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

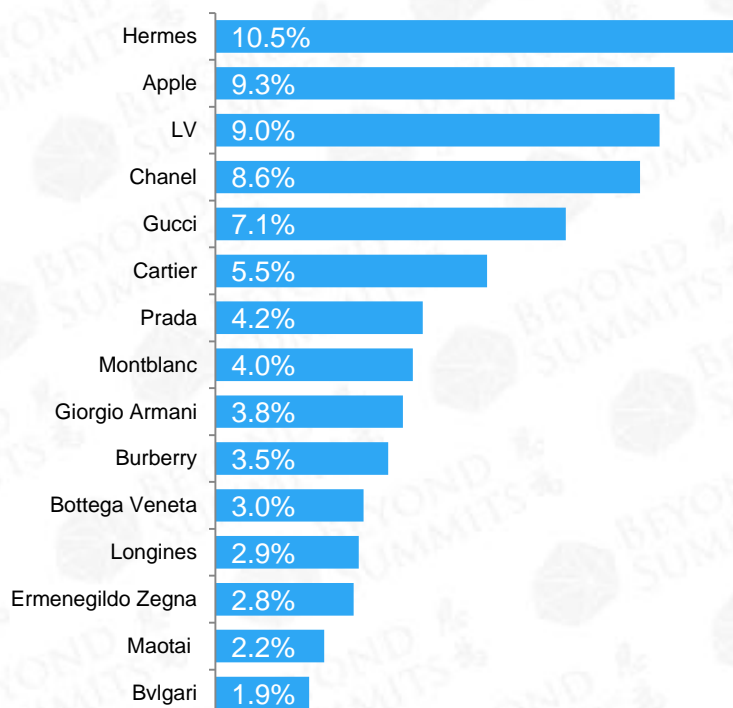
The rich prefer to choose high-end wines for men and jewelry for women. For the elder, the rich give health supplement products and tourism products as presents.



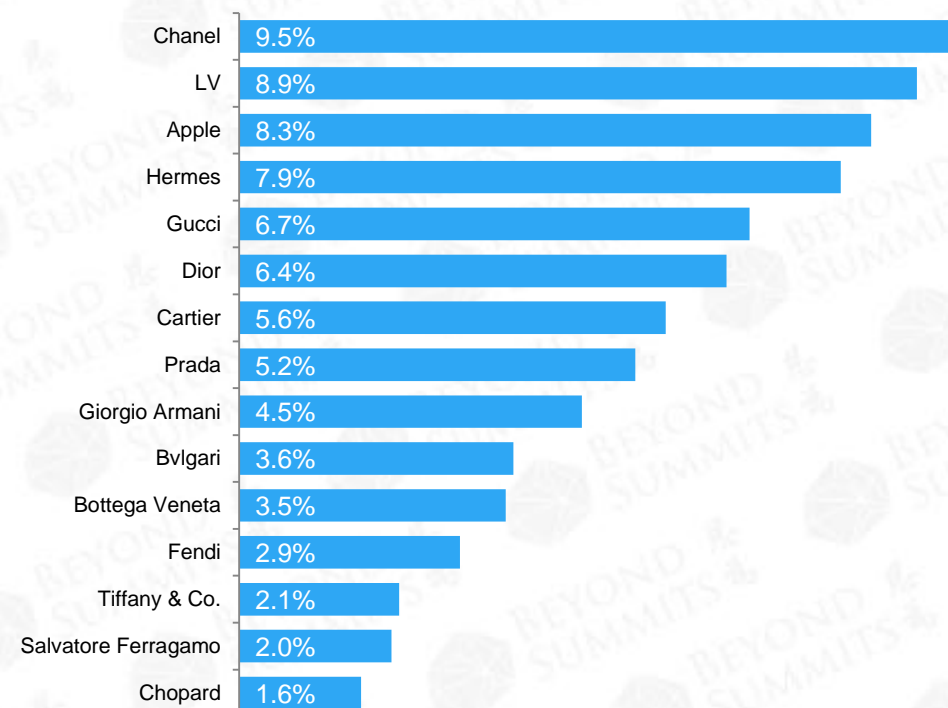
Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

In recent years, Apple has become a favorite brand for gift giving among the rich in China.

Top 15 Brands for Gift Giving by Rich Men (2014)



Top 15 Brands for Gift Giving by Rich Women (2014)



Source : Hurun, *Hurun Chinese Luxury Consumer Survey 2014*

2015 China Overview, covering Chinese economy, media and markets, is a set of yearly research report conducted and published by Beyond Summits Ltd, a leading all-media total solution provider focused on cross-border brand building & destination marketing in China. This report aims to summarize domestic industries' status in 2015, introduce Chinese market knowledge to overseas stakeholders, and propose Chinese market insights. The whole set of China Overview includes 20 sub-topics including economy, city, people, the rich, luxury, investment, auto, tourism, immigration and cross-border business, as well as Chinese all media, internet, mobile internet, social media, TV, radio, print, OOH, movie and airport.

This report is the full version of 2014-2015 China Overview Tourism Market Report. More reports can be downloaded from Beyond Summits' official website link: http://www.beyondsummits.com/reports_downloading

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