



**Dragon Trail**  
INTERNATIONAL

# CAUTIOUS, WITH A HINT OF OPTIMISM

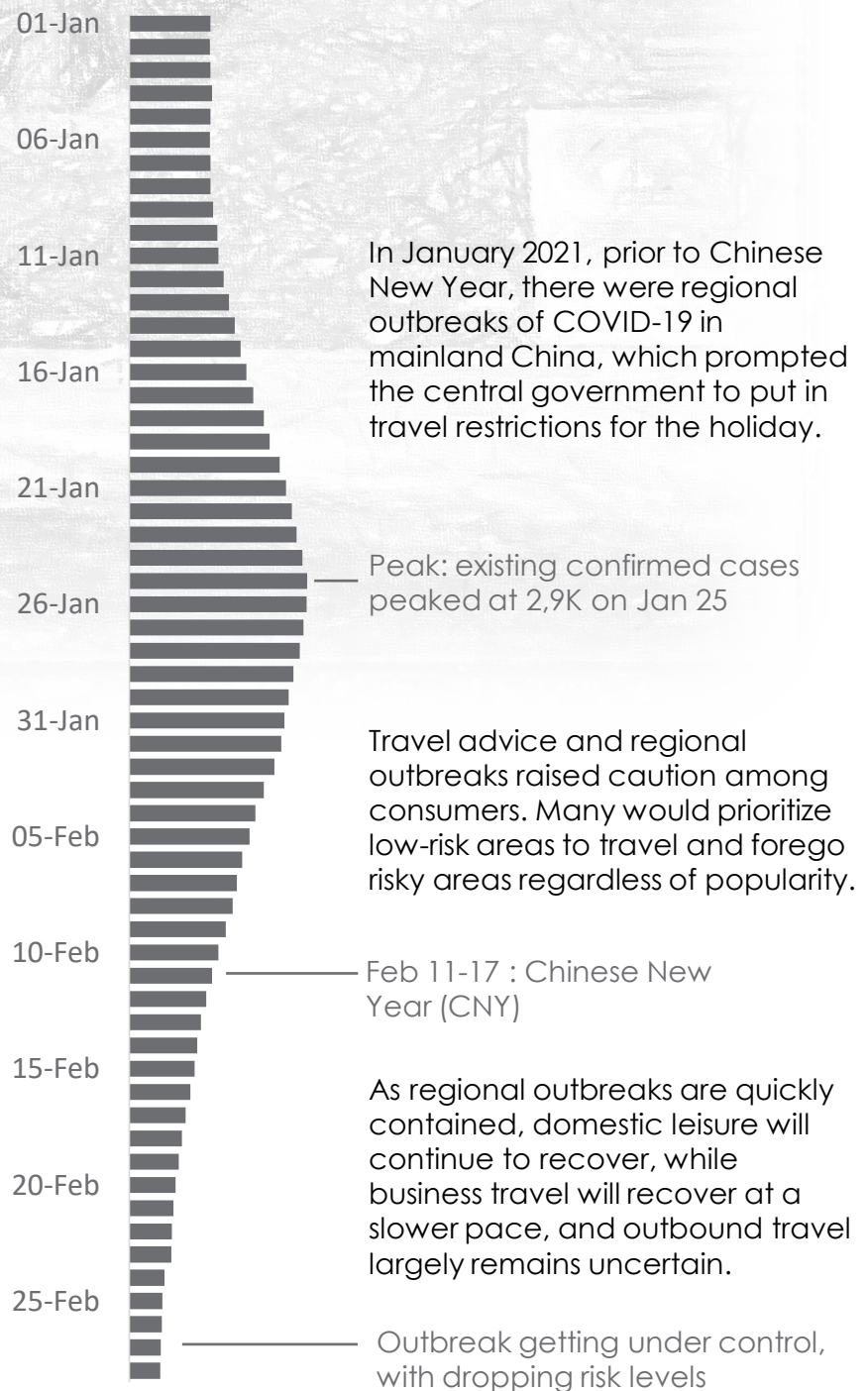
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## Chinese Consumer Travel Sentiment Report

Dragon Trail Research

March 2021

# Sentiment: Domestic Travel



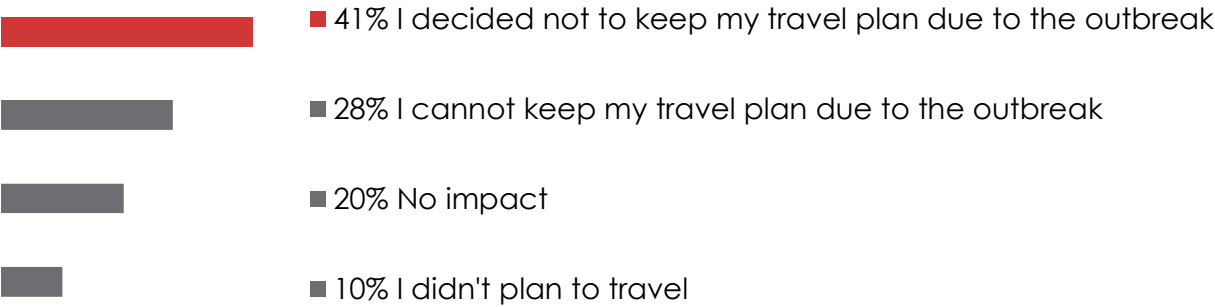
Source: 新冠肺炎疫情地图, 实时更新. [https://news.sina.cn/zt\\_d/yiqing0121](https://news.sina.cn/zt_d/yiqing0121)

# Official Travel Advice Prior to Chinese New Year Strongly Affected Travel Intentions

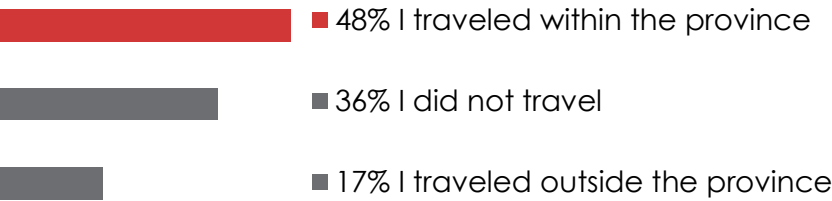
Due to the regional outbreaks, Chinese consumers were advised to stay home during Chinese New Year, a time when massive number of migrant workers would normally be returning home, and a period when domestic tourism was expected to be strong.

Migrants returning home might undergo strict pandemic control. Regulations also differed by provinces and cities. As a result, many were unsure about the development of travel advice following the regional outbreak.

## How did the regional outbreaks prior to CNY affect your travel plan?



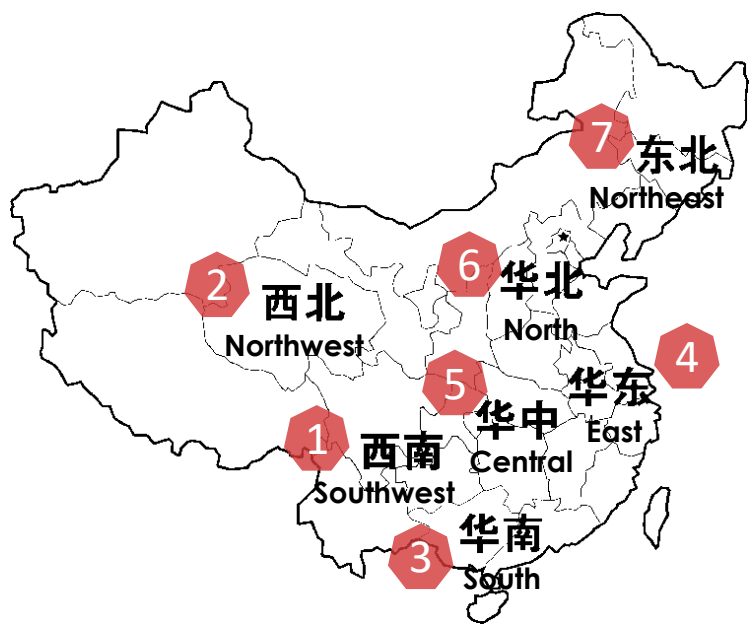
## Have you traveled (including visiting home) during CNY?





# Consumers Prioritized Southwest and Northwest Over North China, Likely Due to Regional Outbreaks

Both Southwest and Northwest China are known for large areas of land, with rich natural offerings, distinctive food culture, and important landmarks. Beijing as a popular destination did not drive up preferences for North China, likely due to the regional outbreaks.



Please rank the following regions from most preferred (1) to least preferred (7) to visit:

	#1	#2	#3	#4	#5	#6	#7
Southwest	44%	20%	13%	9%	6%	4%	3%
Northwest	8%	24%	14%	13%	15%	15%	11%
South	15%	18%	22%	17%	11%	9%	7%
East	18%	17%	18%	21%	12%	8%	6%
Central	3%	6%	12%	17%	27%	22%	12%
North	6%	9%	15%	15%	17%	26%	12%
Northeast	5%	5%	6%	8%	11%	17%	48%

How to read

Horizontal: how people rank each region

“44% ranked Southwest as most preferred to visit, 3% ranked it as least preferred.”

Vertical: proportion that rank other regions the same way

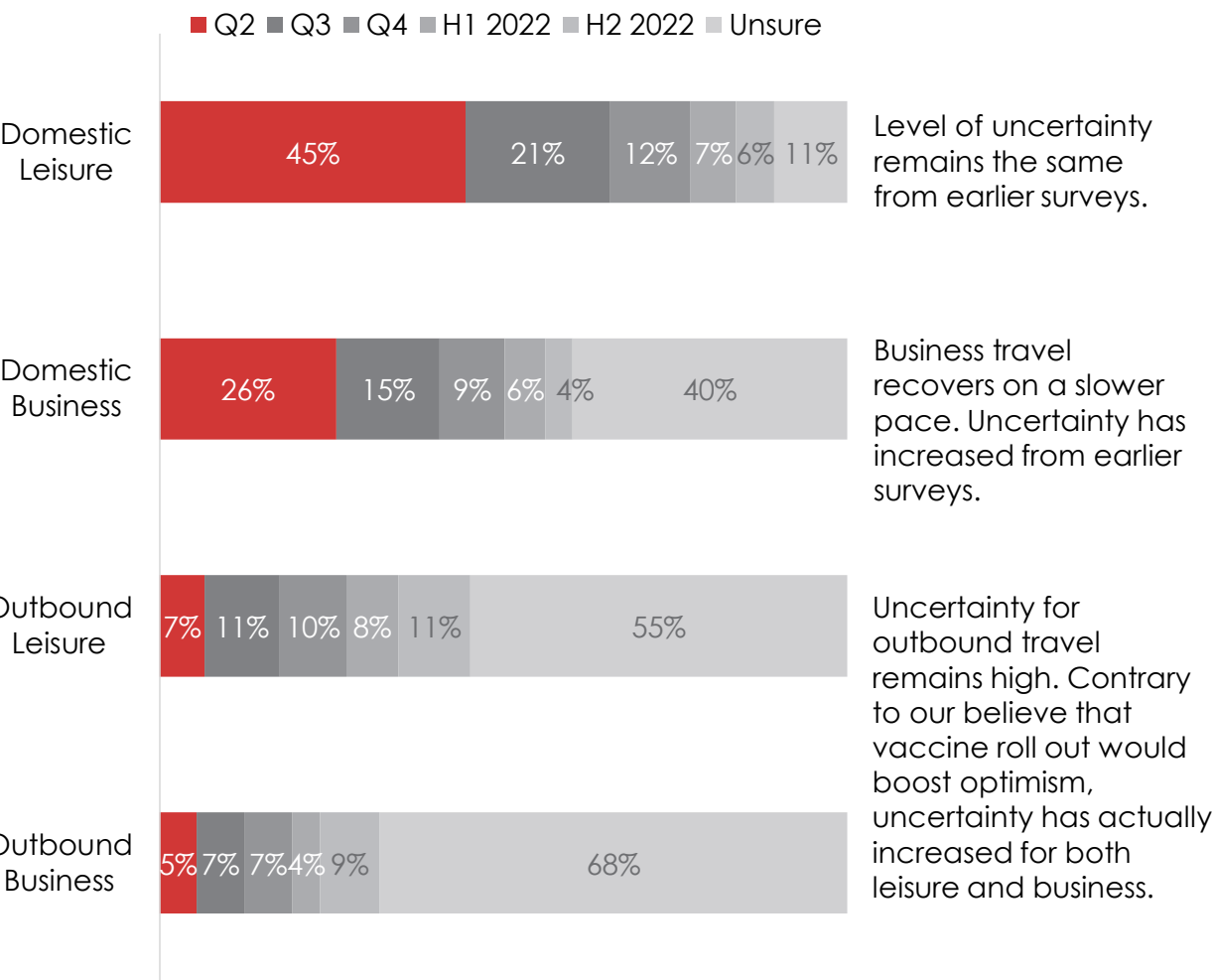
“48% ranked Northeast as least preferred, highest region ranked #7.”

# Despite Regional Outbreaks, Domestic Travel Resumes Quickly. Outbound Travel Still Remains Highly Uncertain

After CNY, regional outbreaks have largely come under control, leading to the restart of domestic travel recovery.

Q2 provides Chinese consumers three holiday periods for traveling: 3-day Qingming Festival (3-5 April), 5-day Labor Day (1-5 May), 3-day Dragon Boat Festival (12-14 June).

## When is the earliest you would consider traveling?

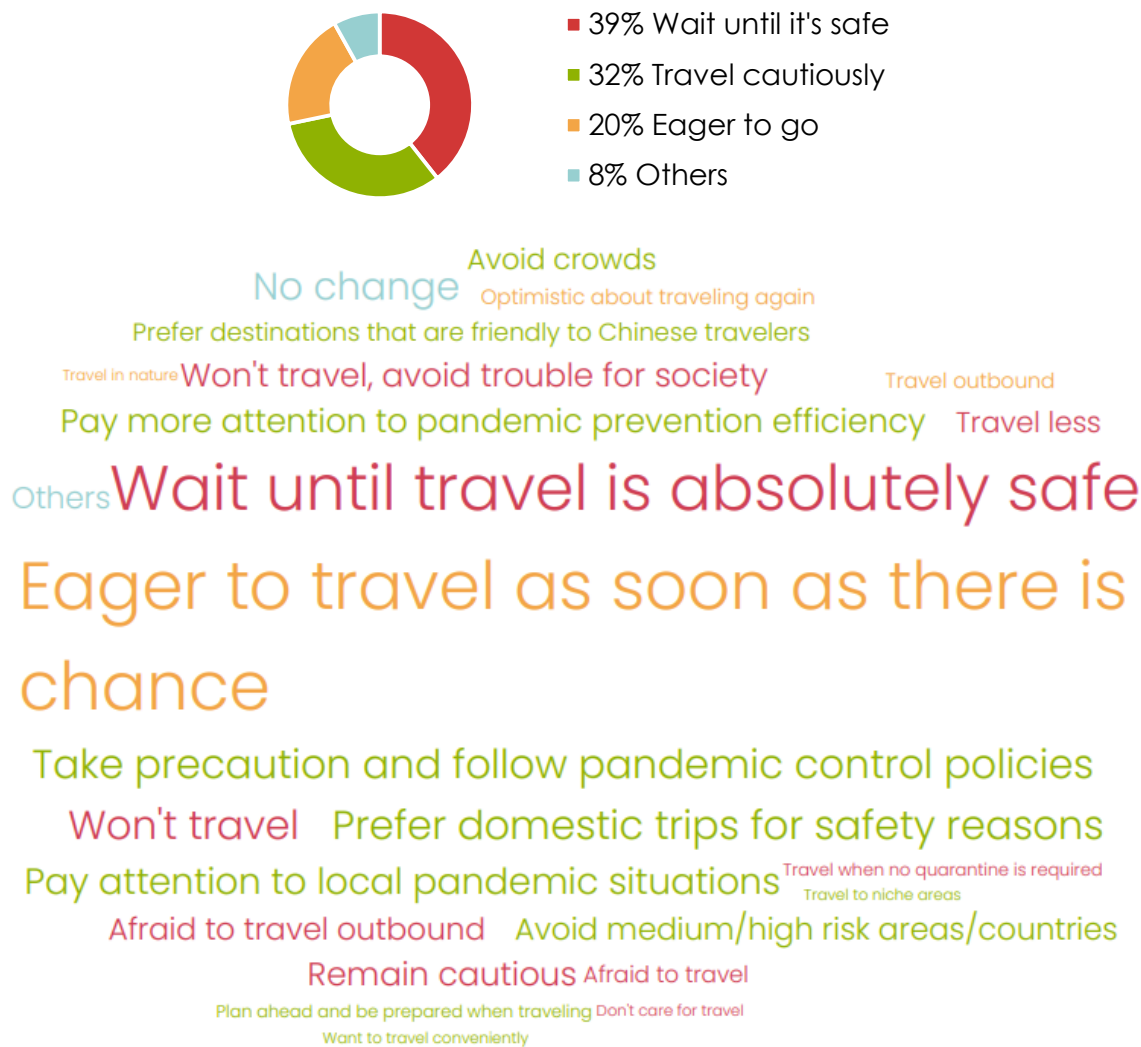


# Safety Concerns Dominate Sentiment, But There Is a Hint of Optimism

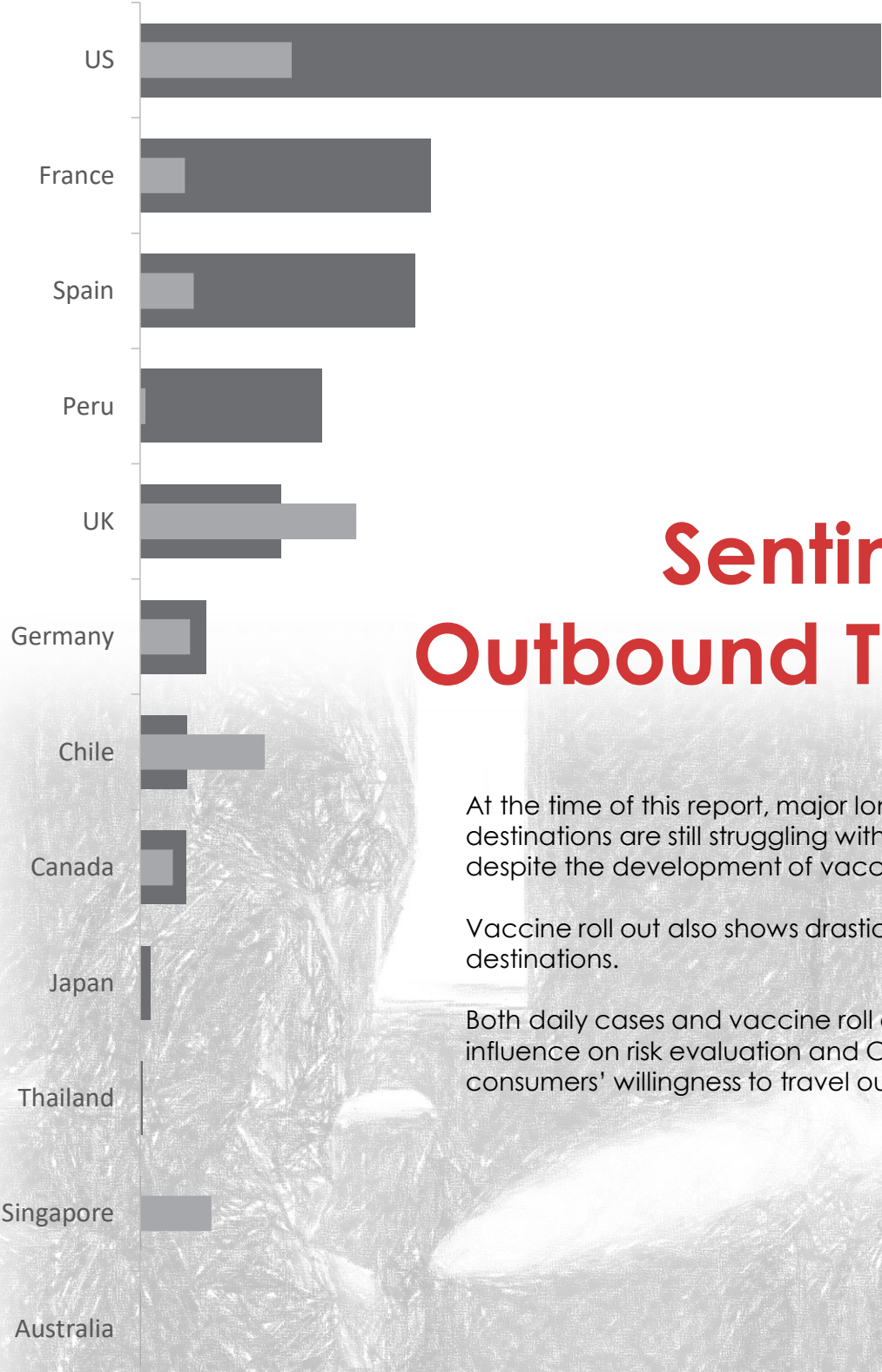
Chinese consumers are very cautious, even though domestic travel has started to recover. The largest proportion of survey respondents felt they needed to wait until it's safe, followed by those who are willing to travel, but will do so cautiously.

Compared to our September 2020 sentiment survey, when over half said that they felt that safety needs to come first, the latest survey showed that sentiment around absolutely not traveling decreased, while intentions to travel cautiously increased.

## Has COVID-19 changed how you feel about traveling?



Daily Cases\* and Vaccine Doses Administered Per 100 People\* As of Feb 22



# Sentiment: Outbound Travel

At the time of this report, major long-haul destinations are still struggling with daily cases, despite the development of vaccines.

Vaccine roll out also shows drastic difference by destinations.

Both daily cases and vaccine roll out have some influence on risk evaluation and Chinese consumers' willingness to travel outbound.

\* Source for daily cases: COVID-19 Dashboard. Coronavirus Resource Center, Johns Hopkins University & Medicine. [https://news.sina.cn/zt\\_d/yiqing0121](https://news.sina.cn/zt_d/yiqing0121)

\* Source for vaccine roll out: Coronavirus (COVID-19) Vaccinations. Our World in Data. <https://ourworldindata.org/covid-vaccinations>

## Regional Preferences for Outbound Travel and Top Wish List Items Were Similar From 2019

Despite the uncertainty for when to travel, regional preferences remained the same. Asia, Europe, and North American are still ranked as the top 3 regions, as in 2019, according to China Tourism Academy (CTA)\*.

Please rank the following regions from most preferred (1) to least preferred (9) to visit

	#1	#2	#3	#4	#5	#6	#7	#8	#9	
Asia	50%	19%	10%	6%	3%	2%	2%	3%	4%	How to read
Europe	25%	42%	14%	5%	4%	2%	2%	4%	3%	
North America	3%	11%	37%	19%	12%	6%	5%	4%	3%	Horizontal: how people rank each region
Latin America	1%	4%	8%	30%	25%	18%	8%	4%	2%	
Caribbean	3%	5%	7%	9%	24%	21%	17%	8%	6%	Vertical: proportion that rank other regions the same way
Pacific	2%	5%	8%	15%	18%	28%	16%	7%	2%	
Africa	4%	4%	4%	4%	4%	6%	29%	26%	17%	
Middle East	3%	3%	4%	5%	4%	9%	13%	36%	23%	
Polar	10%	7%	8%	6%	6%	6%	8%	9%	39%	

Similar to pre-pandemic travel preferences, survey respondents listed trying local food and visiting landmarks as the top things to do on their next outbound trip. This shows that Chinese consumers would still consider more crowded areas like major landmarks and museums when traveling outbound, within the limits of risk levels and policies.

### What activities would you like to do on your next outbound trip? (Top 5)



Source: Dr. Yang, J.S. (2020). 中国出境旅游发展报告2020. China Tourism Academy

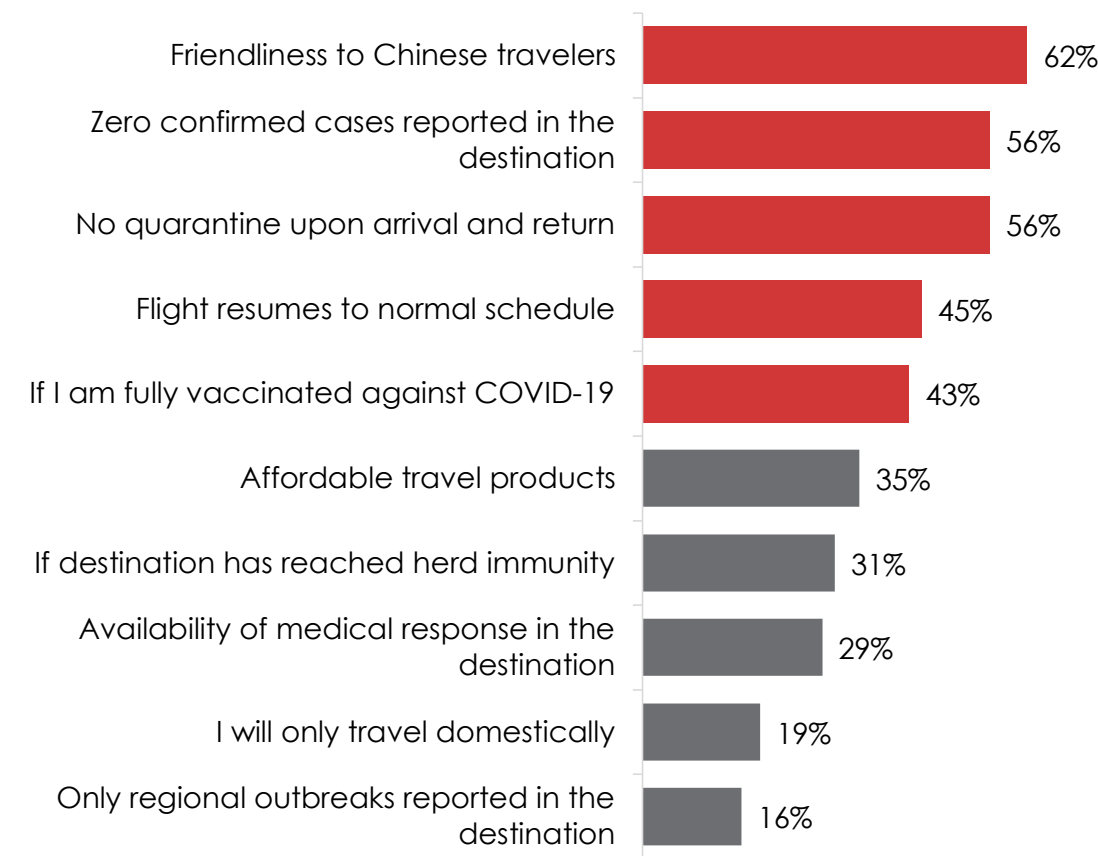


# Safety Concerns Go Hand-In-Hand With What Motivates Outbound Travel: Friendliness to Travelers, Risk Levels, and Travel Policies

For Chinese travelers, destination risk levels, pandemic control policies and friendliness to Chinese travelers are top-of-mind concerns when selecting a destination.

What motivates outbound travel reflects the same picture as top-of-mind concerns. Friendliness seems to be the priority for 62% of Chinese consumers, regardless of whether they are eager to travel or not.

## What would make you feel willing to travel outbound? (Top 5)



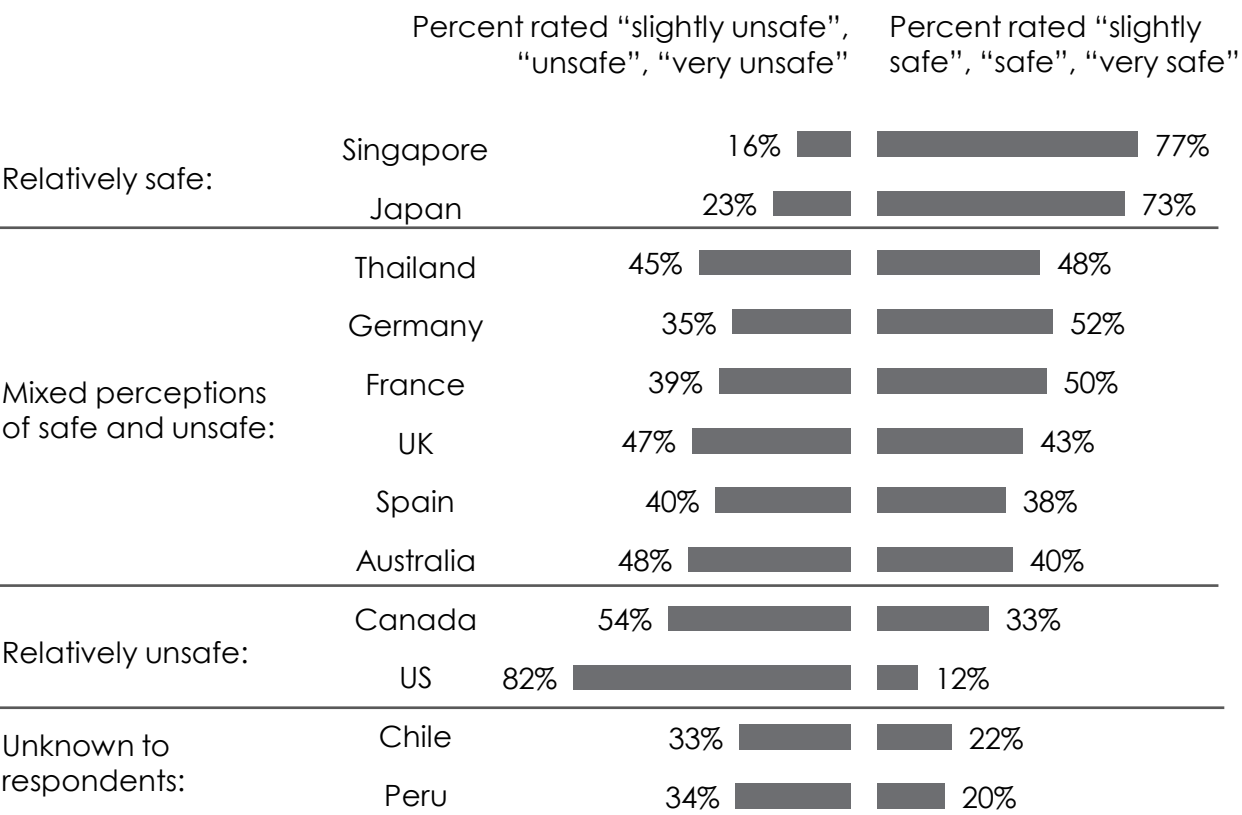
# Short-Haul Destinations Perceived Relatively Safer Than Long-Haul Destinations

We observed four types of perception on safety from 12 destinations – relatively safe, mixed perceptions, relatively unsafe, and unknown.

Destinations such as Australia, Thailand, and Canada have a relatively good record of pandemic control based on daily cases and vaccine roll outs. However, these are not perceived as relatively safe destinations, suggesting other factors are at play, such as friendliness to Chinese travelers and the social order in a destination.

Although US is perceived as relatively unsafe, preference to visit North America remains high.

## In your opinion, how safe is it to travel to the following destinations?



\* Not including those who rated "unsure" for each destination

- Local preventative measures
- Family and friends' willingness to travel
- Distance of destination
- Destination official risk levels
- Travel's impact on the economy
- Travel group size and privacy
- Transportation type (drive, flight, train)
- Chinese government announcing it's safe to travel
- Travel agent advising it's safe to travel

External Factors

- I have always been a traveler
- Travel is good for my mental health
- My personal experience with the virus
- I want to be perceived as a responsible person
- I am healthy and young
- My optimism levels
- Personal finances
- Social pressure

Internal Factors

Perception of safety could be influenced by a mix of external and internal factors. It could also be shaped by the amount of media coverage or individual's eagerness to visit each destination.

To understand the mix of factors that influence safety perception, essentially what makes Chinese consumers comfortable to travel, we needed to explore beyond the top outbound travel motivators, to understand drivers of travel intention.

We started out with a pre-determined list of 17 factors, and grouped them based on their similarity in responses.

Think of it as a personality test, which asks a list of questions and arrives at a "type" that best describes one's personality. Each group is described by a mix of the 17 factors measured.

# Besides Destination Pandemic Situations, Chinese Consumers Face Social Pressure When Traveling Again

With our 17 factors, we reached 6 groups. Three of the factors were not grouped because of their distinctiveness, and were added below individually.

Strong drivers are still destination risk levels, but also the perceived risk of travel – social pressure, local preventative measures, financial cost. Social pressure stems from the risk of spreading the virus and worsening the pandemic. A cloudy view of local preventative measures would also deter the well-protected Chinese consumers. Financial cost from unforeseen outbreaks, leading to potential loss of time or income, would add to traveler hesitation as well.

**In your opinion, how would the following statements affect your intention to travel?  
(Percent who selected “very strong impact, strong impact, some impact”)**

Strong Drivers	Medium Drivers	Mild Drivers
<b>86%</b> Destination official risk levels	<b>72%</b> External messages: Government travel advice and travel agency confidence	<b>50%</b> Travel's impact on the economy
<b>82%</b> Perceived risk of travel: Social pressure, local preventative measures, financial cost, etc.	<b>72%</b> Personal history: Personal experience with the virus, optimism levels	<b>39%</b> Meaning of travel: Whether one has always been a traveler, whether travel is good for one's mental health
	<b>71%</b> Low-risk approach: Distance of destination, travel group size, transportation type	
	<b>70%</b> Family and friends' willingness to travel	
	<b>64%</b> Self image: Being healthy and young, how one wants to be perceived by others	



## Drivers of Travel Intention Have an Impact on Destinations' Perception of Safety

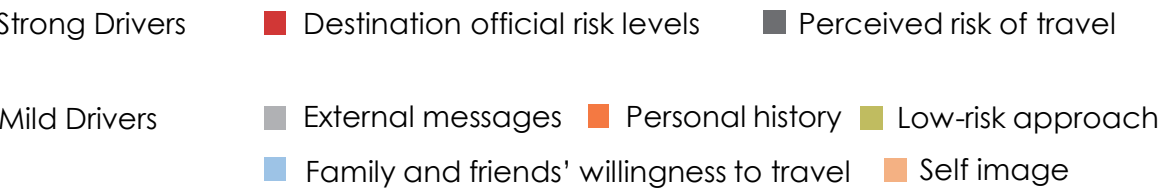
With destinations recovering at different paces across the world, we went a step further to measure whether the drivers have an impact on each destination's perception of safety.

External messages play a major role in shaping perception of safety for the majority of destinations, except the UK and France.

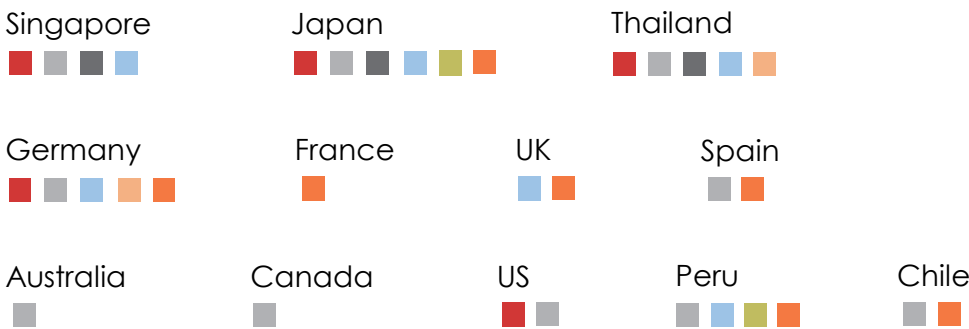
Perceived risk of travel has a stronger impact on Asian destinations. These short-haul destinations would benefit from alleviating the social pressure from traveling, delivering news about pandemic control effectiveness, and communicating the foreseeable cost of traveling outbound. Thailand would need more convincing by speaking to consumers' concern about self image.

Personal history has a stronger impact on European and Latin American destinations, suggesting that engaging audiences with actual travel experience in the new normal and raising optimism levels would be vital.

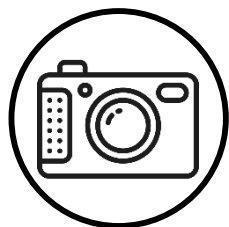
For North American destinations and Australia, external messages play the main role, which makes it vital to work with Chinese travel trade.



Impact of drivers on destinations' perception of safety



# Four Segment Differences



## Outbound Activities:

- **Chinese consumers with children** are more likely to select family-friendly attractions than consumers without children.
- **Post 90s and younger** consumers are more likely to select shopping than post 80s and older consumers.



## Outbound Travel Motivation:

- **Male** consumers are more likely to be motivated by getting fully vaccinated than female consumers.
- **Consumers with family monthly income above 12K** are more likely to be motivated by flights resuming normal schedule. Consumers with monthly income 12K and below are more likely to travel domestically.



## Perception of Safety

- **Consumers with children** are more unsure about Peru and Chile than consumers without children.
- **Post 90s and younger** consumers are less likely to rate "safe" for Singapore than post 80s and older consumers.
- **Male** consumers are more likely to rate Japan and Germany as "safe" than female consumers. Female consumers are more likely to rate "unsure" for Chile.
- **Consumers with family monthly income above 12K** are more likely to rate Thailand and Japan as "safe".

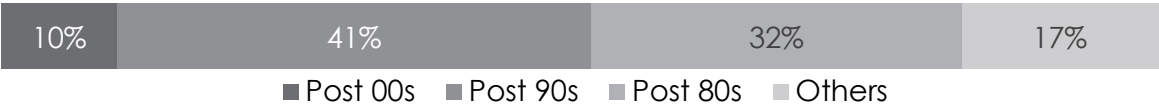
## Methodology

From February 22 to March 3, 2021, Dragon Trail Research conducted an 18-question survey through Tencent survey panel, and received 1052 completed responses.

Target respondents were selected from 4 tier-1 cities, 15 new tier-1 cities, and 30 tier-2 cities. Respondent age and gender were controlled with quota.

Results from the survey were analyzed through statistical testing, such as between-group t-test, factor analysis, and regression analysis.

Age ranges between 18 and 72:



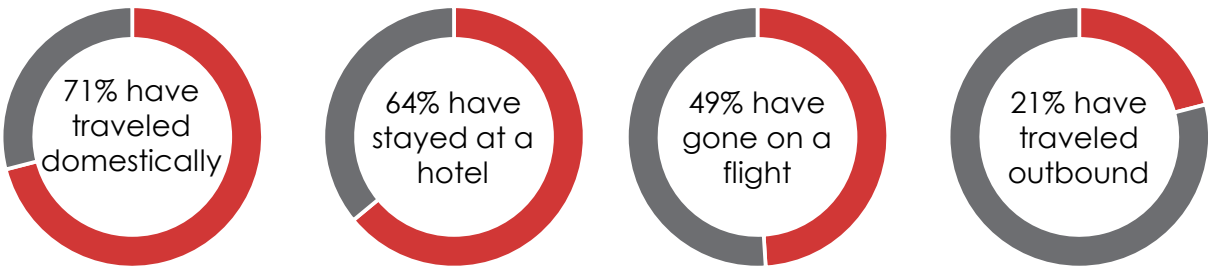
Gender



City of residence includes four tier-1 cities, 15 new tier-1 cities, and 30 tier-2 cities.



71% of respondents have traveled domestically, and 21% have traveled outbound from 2015 to 2019.





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Dragon Trail Research empowers decision-making for the travel industry. Founded in 2019, Dragon Trail Research delivers quantitative and qualitative research fueled by statistics to help our clients uncover market trends, evaluate tactics, and engage their target audience.

## SERVICES WE PROVIDE

- Traveler Sentiment Analysis
- Awareness & Satisfaction Studies
- Competitor Analysis
- Travel Trade Surveys
- Customized Research

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