



Dragon Trail
INTERNATIONAL

TRAVEL SAFE, GO FURTHER

China Traveler Sentiment Report

Produced by Dragon Trail Research
September 2021



Dragon Trail
INTERNATIONAL

CHINA TRAVEL MARKET MONITOR

A new product launched by Dragon Trail Research, our Market Monitor survey allows you to ask your most pressing questions to Chinese outbound travelers.



**COST
EFFECTIVE**



**MONTHLY
INSIGHTS**



**ON CHINESE
TRAVELERS**

WHAT

Buy in to a **monthly** survey to get answers to your **most pressing questions** for **Chinese travelers**.

WHY

Perfect for getting insights on:

- Destination awareness and preferences.
- Perceptions of safety and other travel sentiments.
- Test advertising and messaging.

HOW

1. Submit your questions. We'll help you craft them!
2. Survey launched to ≥ 1000 Chinese outbound travelers.
3. Results delivered!
4. Debrief.

TIMINGS

Questions confirmed: 8th day of the month

Data delivered: 1st week of the next month

OUTPUTS

Data tables with cross tabulation.

Optional PPT reports.

Your data is kept private from others.

**Make data-driven decisions
at an affordable cost**

Contact us to
join our Market Monitor platform:

info@dragontrail.com

COSTS

USD \$599

per question

Minimum of 4 questions



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Highlights

1

Sentiment around "won't travel" has reduced, replaced by sentiments around "travel cautiously". Chinese travelers expressed frustration around safety concerns and restrictions, and were eager to find ways to relax from constant worrying.

2

While only 1/3 of domestic travelers said they planned to travel cross-provincially, almost 2/3 intended to do so when asked where they would travel next. Local travelers primarily aggregated in coastal provinces, while cross-provincial travelers favored the Southwest, Northwest, Central areas and Beijing.

3

4/5 of travelers preferred FIT, with around 1/5 of "spillover" into small group, private group, and customized travel.

4

Nature and beach travel themes were hot, while sports and winter tourism stayed niche. Despite safety concerns, Chinese travelers would continue to visit typically crowded attractions such as landmarks, theme parks, zoos and museums.

5

Over 1/2 of Chinese travelers preferred the border to be opened for inbound travelers during the upcoming Winter Olympics, but only around 1/3 agreed that quarantine-on-arrival in China should be relaxed. 1/3 preferred it to remain the same, and another 1/3 preferred even stricter quarantine.

6

4/5 of Chinese travelers responded favorably to outbound destination information. Many felt fascinated, enjoyed the novelty, and appreciated themes of gastronomy, beach and culture. Around 13% felt afraid due to the ongoing pandemic and wouldn't be interested in information on outbound destinations until after the pandemic.

7

To gauge when "after the pandemic" would be, we measured perception of prerequisites for outbound travel. Official travel advice and quarantine had the strongest impact. Destinations that report few confirmed cases or reached herd immunity would encourage travelers to return as well.

8

Although many destinations have sped up vaccination roll-outs, many are still battling new cases. This survey found that number of new cases has a high correlation with safety perceptions.

Methodology

Dragon Trail Research conducted a 19-question online survey on China's travel sentiment for both domestic and outbound travel. The survey was fielded from August 16 to August 20, 2021 towards 4 tier-1 cities, 15 new tier-1 cities and 30 tier-2 cities. Respondents' age was controlled to reflect the age range of Chinese travelers. A data cleaning process removed invalid and biased responses, resulting in a total of 1,062 completed responses.

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Gender		City tiers	
Male	52%	Tier 1 cities	21%
Female	48%	New tier 1 cities	32%
Others	0.3%	Tier 2 cities	47%
Marital Status		Age	
Single	26%	Post 00s	11%
Unmarried	16%	Post 90s	43%
Married without child	7%	Post 80s	28%
Married with child(ren)	49%	Post 70s	14%
Others	2%	Post 60s and others	4%
Family monthly income		Education	
Above 25K	19%	Master's and above	12%
17001-25K	25%	Bachelor's	55%
8001-17K	42%	Associate's	24%
8K and below	15%	High school or others	9%
Children's age range			
18 and above	19%		
13-17	15%		
12 and below	66%		

Note: figures may not sum to totals due to rounding

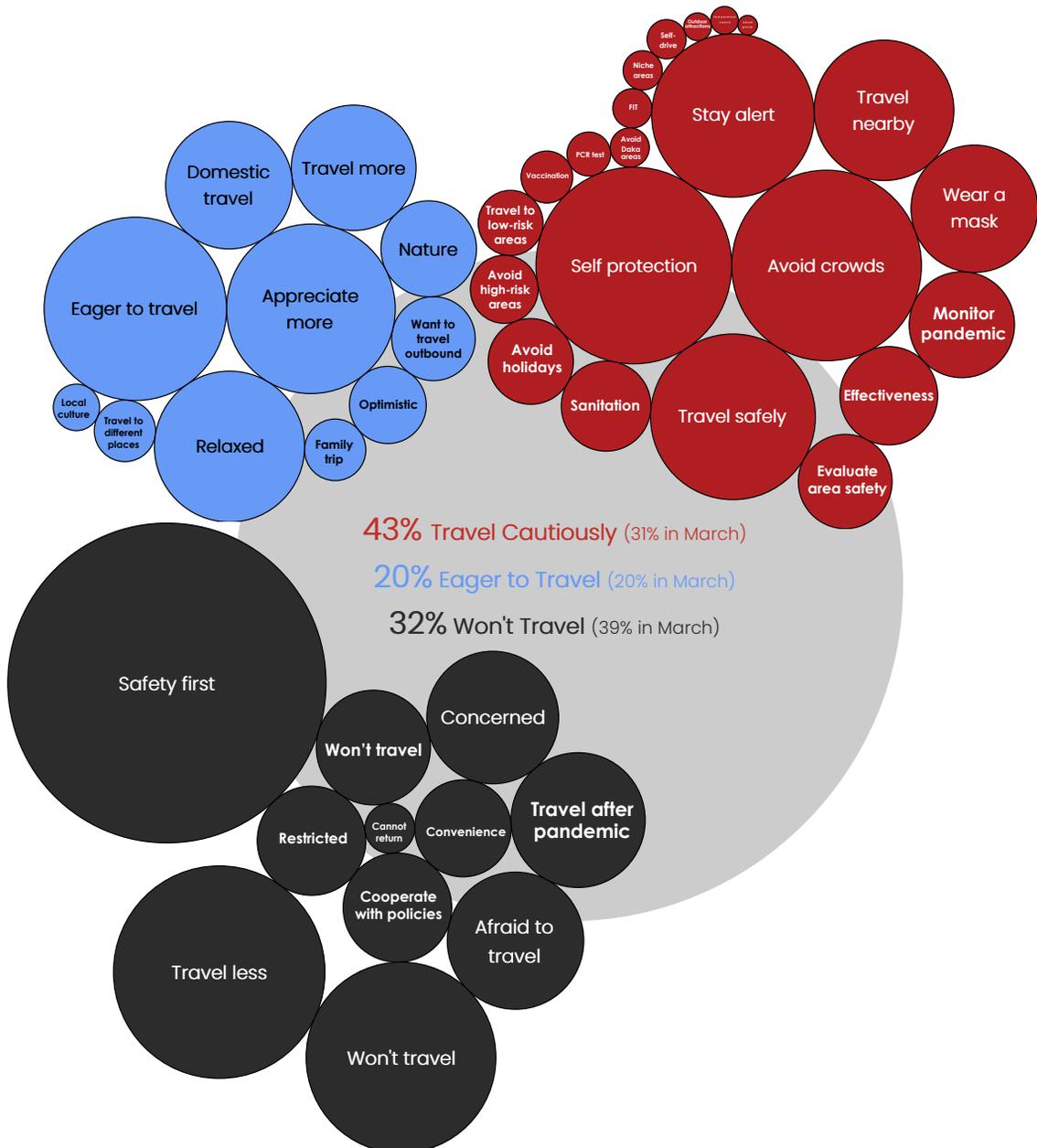


More travelers are now willing to consider travel, many doing so cautiously with heightened safety concern due to domestic outbreaks.

Latest sentiments around “won’t travel” reduced compared to previous surveys, replaced by “travel cautiously”, while “eager to travel” remained the same proportion.



Figure 1. Has COVID-19 changed how you feel about traveling?



Source: China Traveler Sentiment Report, September 2021

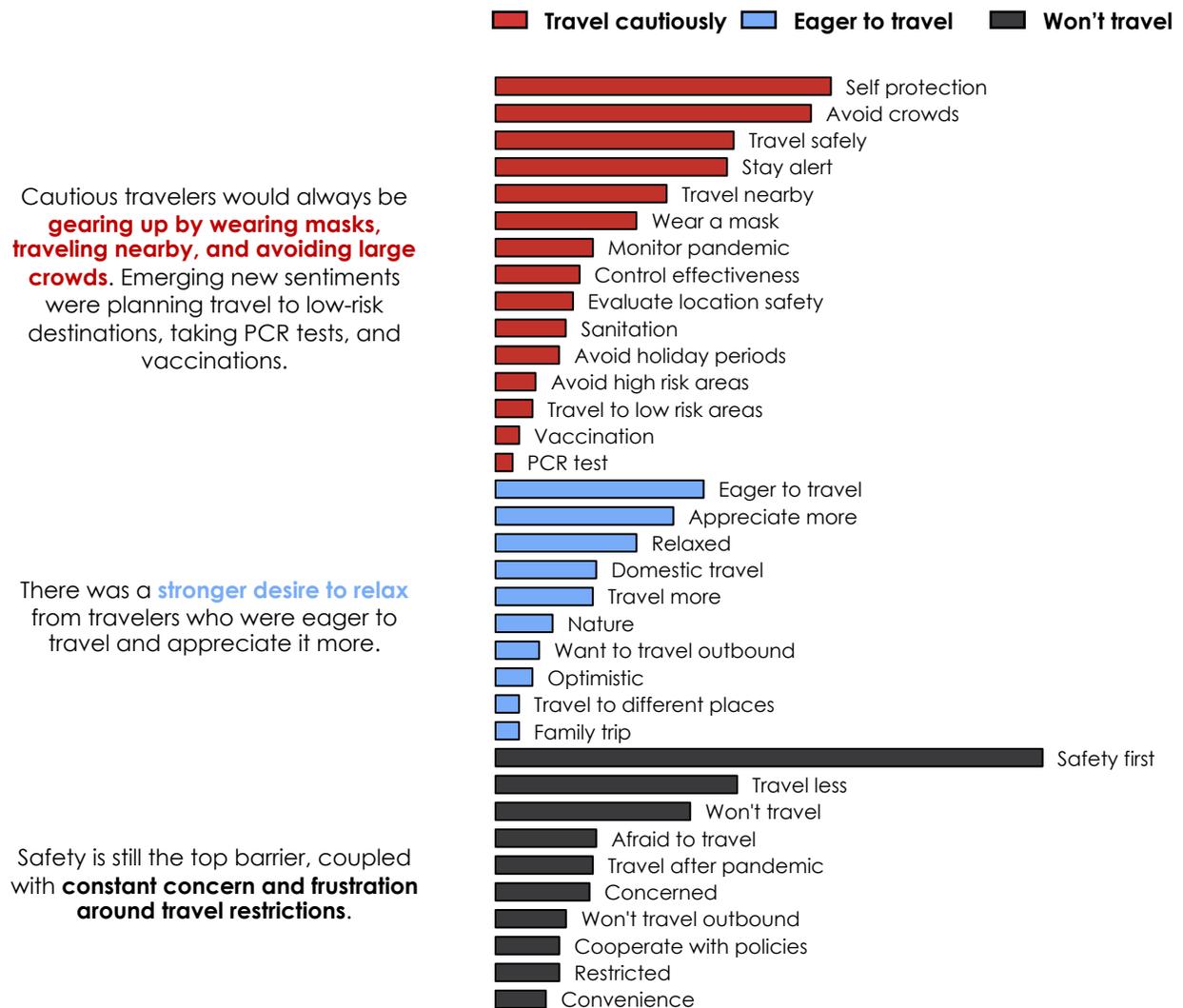
Travelers are tired of travel restrictions, and many are looking for a break.

Traveling in the new normal means constantly evaluating the pandemic situation at the destination and taking precautionary measures to protect from the virus. Those cautiously traveling cited that wearing masks, avoiding crowded areas and holiday periods would be safer.

Those who won't travel frequently mentioned cooperating with policy and prioritizing safety as main reasons. Feeling "restricted" was a new sentiment, suggesting frustrations and pent up demand. Eagerness to "relax" and "appreciate" travel more were also new, suggesting desire to escape from constant worrying about safety.



Figure 2. Attitude about travel in detail



Source: China Traveler Sentiment Report, September 2021

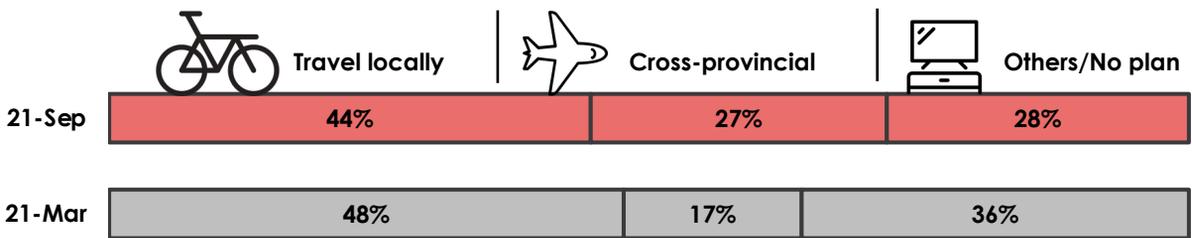
While safety measures are top-of-mind, travelers are resuming previous habits by traveling further and visiting more crowded attractions.

71% of travelers are planning to travel during National Day, significantly higher than in March 2021.

While 44% are traveling locally, cross-provincial travel is on the rise. 27% indicated they planned to travel cross-provincially, much higher than 17% in March. Additionally, when asked where they planned to go for National Day, many of the local travelers said they planned to venture beyond the provinces in which they reside.



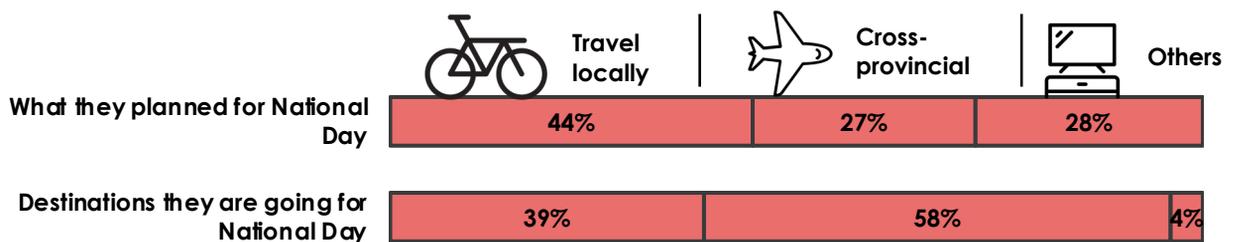
Figure 3. When asked “what are your plans for the National Day holiday?”



Source: China Traveler Sentiment Report, September 2021



Figure 4. When asked “If you are planning to travel over the National Day holiday, where are you going?”



Source: China Traveler Sentiment Report, September 2021



Figure 5. Top Destinations For National Day

Top 10 destinations

- 1 Zhejiang
- 2 Guangdong
- 3 Fujian
- 4 Yunnan
- 5 Beijing
- 6 Hunan
- 7 Shandong
- 8 Sichuan
- 9 Shanghai
- 10 Jiangsu

Top 10 local stays

- 1 Guangdong
- 2 Zhejiang
- 3 Fujian
- 4 Shandong
- 5 Hebei
- 6 Jiangsu
- 7 Liaoning
- 8 Anhui
- 9 Beijing
- 10 Chongqing

Top 10 cross-provincial

- 1 Yunnan
- 2 Beijing
- 3 Hunan
- 4 Zhejiang
- 5 Sichuan
- 6 Shanghai
- 7 Shaanxi
- 8 Hainan
- 9 Fujian
- 10 Chongqing

Source: China Traveler Sentiment Report, September 2021

Looking at where travelers planned to go during National Day, we noticed a clear distinction between those traveling locally and those traveling further out.

South, East and North areas (except Beijing) were top areas where travelers prefer to stay local. **Southwest, Northwest, Central areas and Beijing** were the leading destinations for cross-provincial trips. These latter destinations offer more open spaces, with natural and cultural resources, and have been pre-pandemic hotspots.

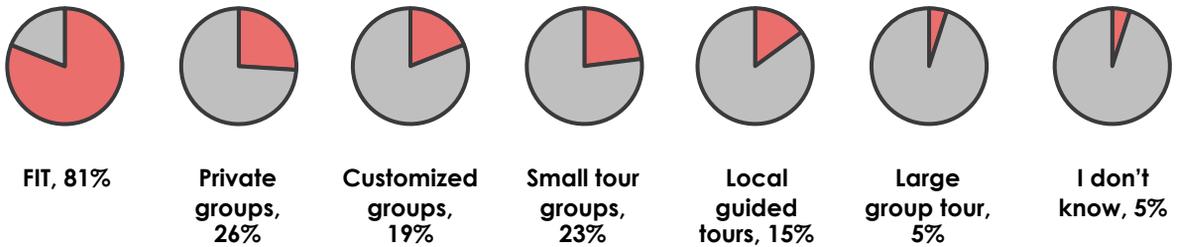
Details about where travelers reside and where they intend to go for National Day are shown in detail in Appendix A.



FIT is a pre-pandemic trend which continues to grow in popularity. When it comes to preferred travel type, there are also spillovers into small group, private group and customized trips.



Figure 6. What is your ideal travel type(s)? (Select all that apply)



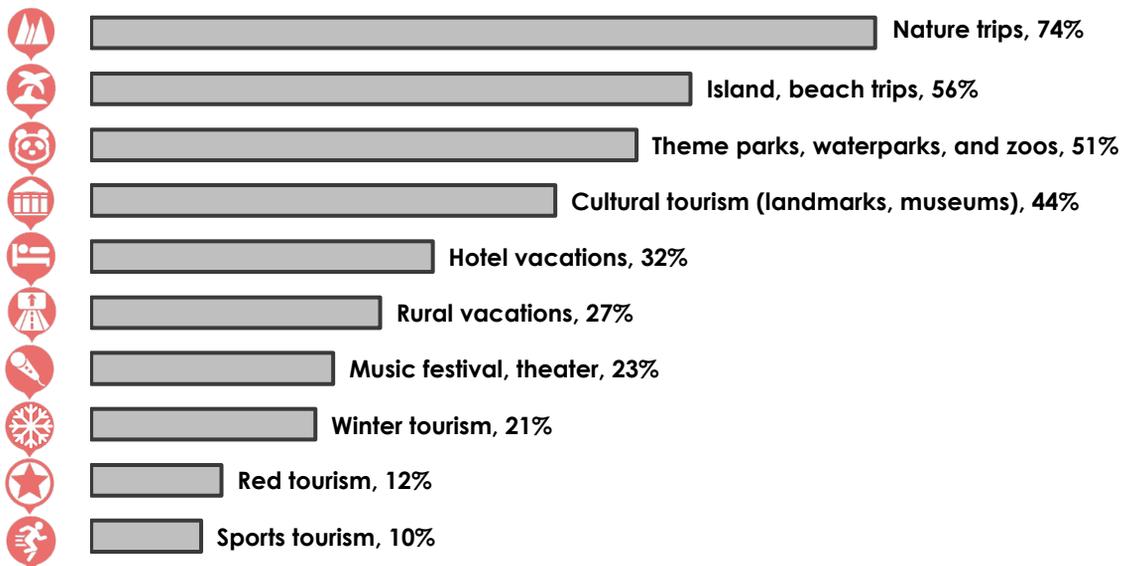
Source: China Traveler Sentiment Report, September 2021

Nature, island and beach travel themes are most sought after. Travelers are also interested in typically crowded attractions such as theme parks and landmarks. For domestic travel, people are resuming pre-pandemic travel behaviors, despite the persistent concern for safety.

Sports, red, and winter tourism are ranking behind, though there might be a chance to tie these travel themes with travelers' desire for wellness and novelty. Winter tourism is also relevant for family travel, and would need to capture travelers' sentiments to drive interest.



Figure 7. Which travel themes are you interested in for your next vacation? (Select all that apply)



Source: China Traveler Sentiment Report, September 2021

1/3 of survey respondents won't travel, feeling afraid and concerned. However, over 1/2 are comfortable with reopening the border, though opinions are mixed on the strictness of travel policies.

Over half of survey respondents are comfortable with opening the Winter Olympics to all visitors. Close to a quarter are comfortable with opening it to domestic visitors only.

Although half of Chinese travelers are open to inbound visitors for the Olympics, only 30% agree that quarantine-on-arrival should be relaxed. Another 36% preferred stricter quarantine for all inbound arrivals.

OLYMPICS



Figure 8.
In your opinion, the Beijing 2022 Olympics:

Should be open to all visitors given a negative PCR test and vaccination record, 53%

Should be held without spectators (same as Tokyo Olympics), 25%

Should only be open to domestic visitors, 23%

Source: China Traveler Sentiment Report, September 2021



Figure 9. In your opinion, quarantine-on-arrival in China:



Source: China Traveler Sentiment Report, September 2021

81% of travelers felt positively when they saw content on outbound travel, and many were fascinated and inspired to travel internationally. A small 13% felt unease, given the ongoing pandemic and travel restrictions.

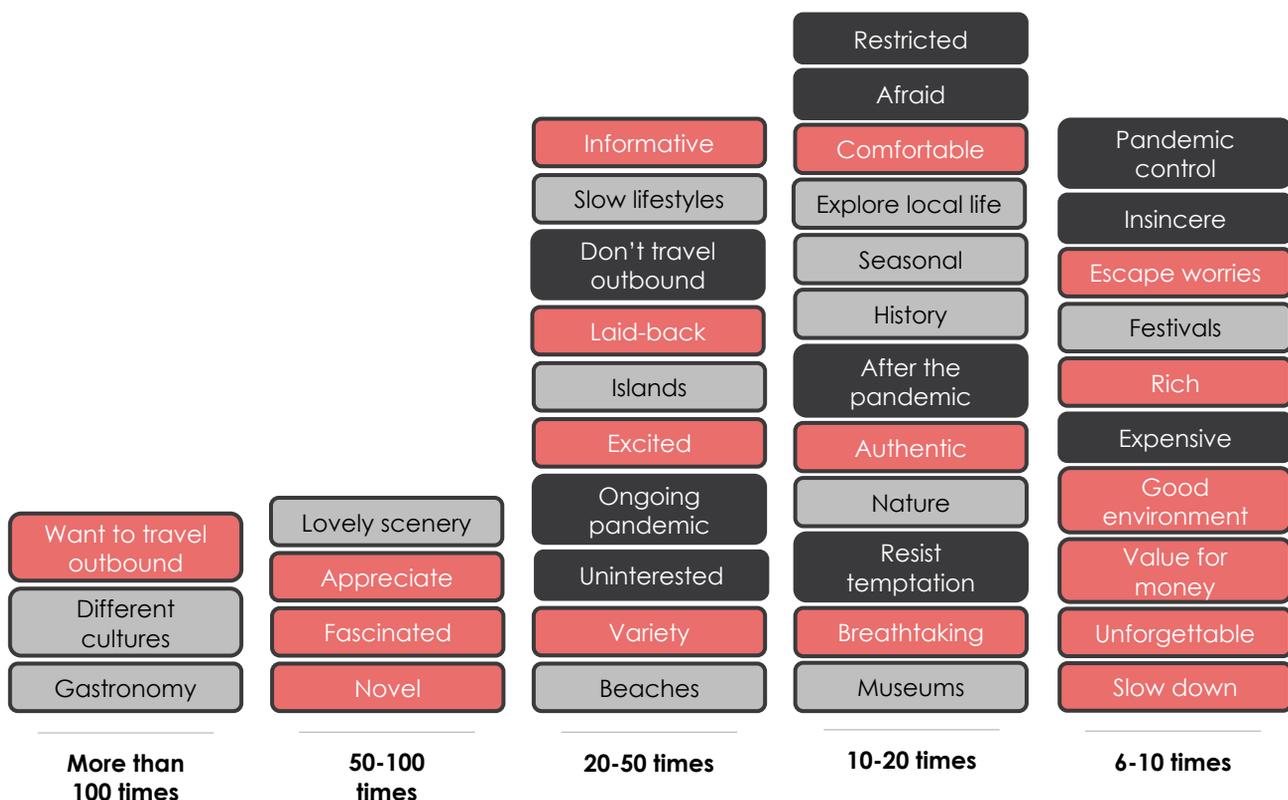
With outbound travel still limited, seeing content about outbound destinations is the easiest way to “travel” internationally. The expression “want to travel” was most frequently linked with the novelty of different cultures, fascinating scenery, variety of gastronomy, and laid-back island lifestyles. Many also mentioned comfort in seeing this content as it distracts them from daily anxieties. Some were also inspired to take notes on travel inspiration for after the pandemic.

At the same time, content could also trigger negative emotions, as travel is still restricted and many wouldn't consider outbound travel until after the pandemic. Careful curation is necessary to avoid sounding insincere or untimely.



Figure 10. Please use one sentence to describe your feelings when you see information about outbound destinations:

Frequency of keywords mentioned, by **positive**, **neutral**, and **negative**



Source: China Traveler Sentiment Report, September 2021

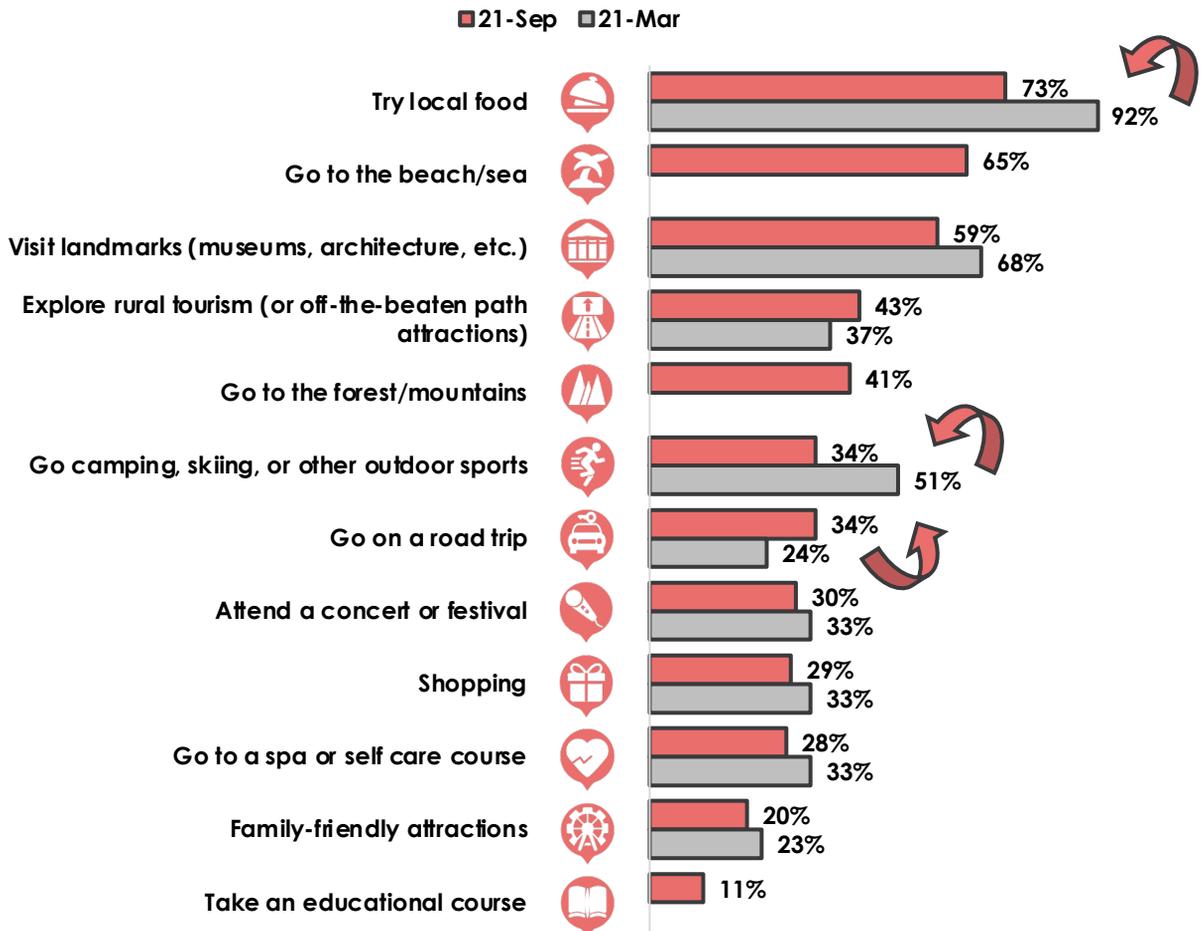
Trying local food and visiting landmarks were popular pre-pandemic, and will likely remain the same, despite concerns about crowded attractions. Beaches and islands are likely to grow into a post-pandemic trend, as these attractions offer both safety and relaxation.

Similar to domestic tourism, travelers crave beach vacations. Visiting landmarks would remain on top of to-do lists, despite concerns about crowded attractions. Local food remained the most desired activity, though interest dropped significantly from March 2021. On the other hand, interest in road trips increased.

At the same time, interest in outdoor sports dropped, consistent with sports and winter tourism for domestic travel.



Figure 11. What would you like to do on your next outbound trip? (Select all that apply)



Source: China Traveler Sentiment Report, September 2021

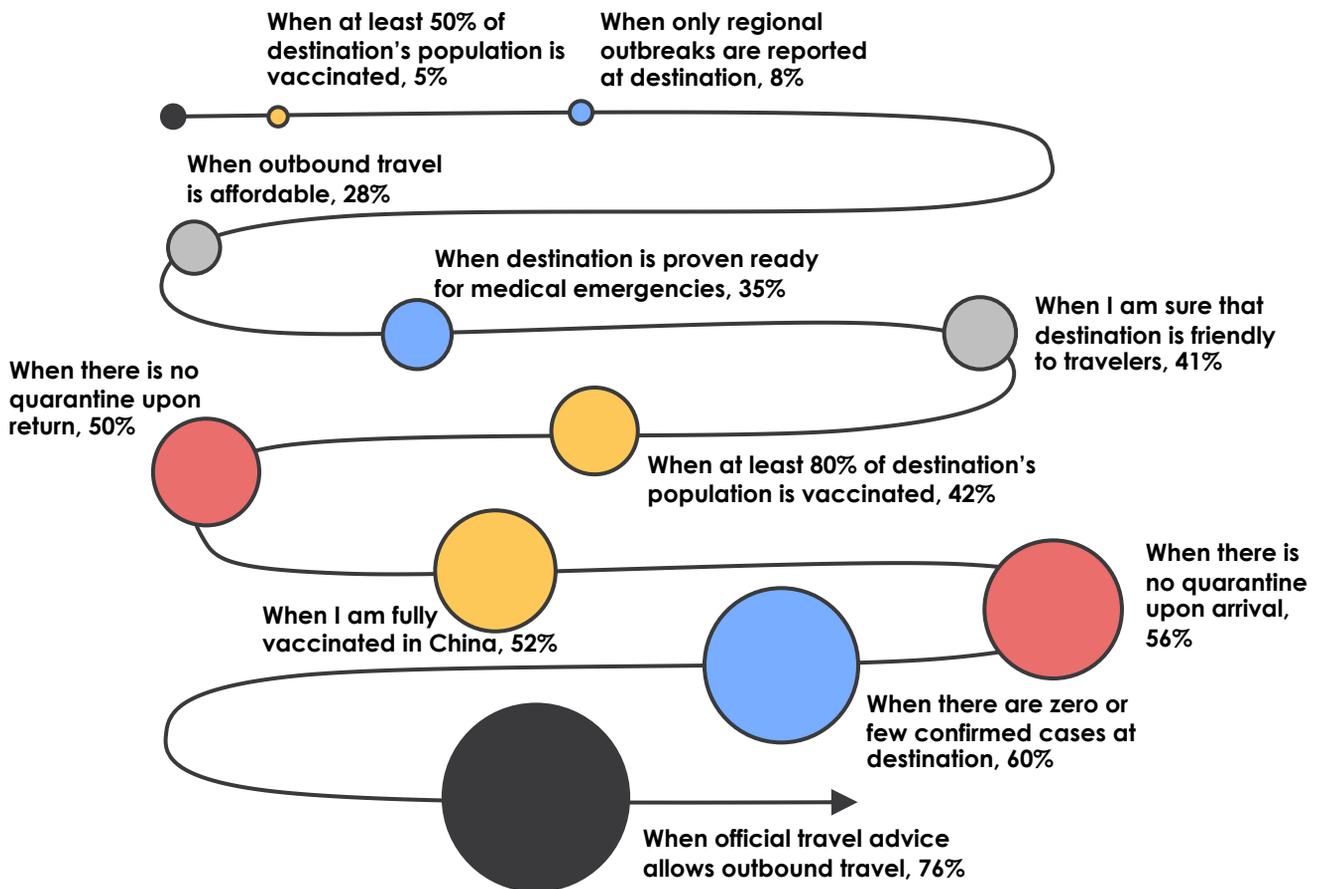
As we look forward to travel “after the pandemic”, we looked at indicators for when that might happen. Herd immunity through vaccination would make 41% comfortable about outbound travel, but more impactful were official travel advice, quarantine, and zero confirmed cases.

Many travelers who won't travel now intended to wait until after the pandemic to travel. Many cited cooperating with official travel policy such as stay-at-home vacations as reasons for not traveling.

Official travel advice had the strongest influence on outbound travel, followed by zero or few confirmed cases, no quarantine, and being fully vaccinated in China. Compared to these, herd immunity through vaccination, friendliness, and affordable travel products have some impact but are less influential.



Figure 12. Among the following items, which ones are prerequisites for you to travel outbound? (Select all that apply)



Source: China Traveler Sentiment Report, September 2021

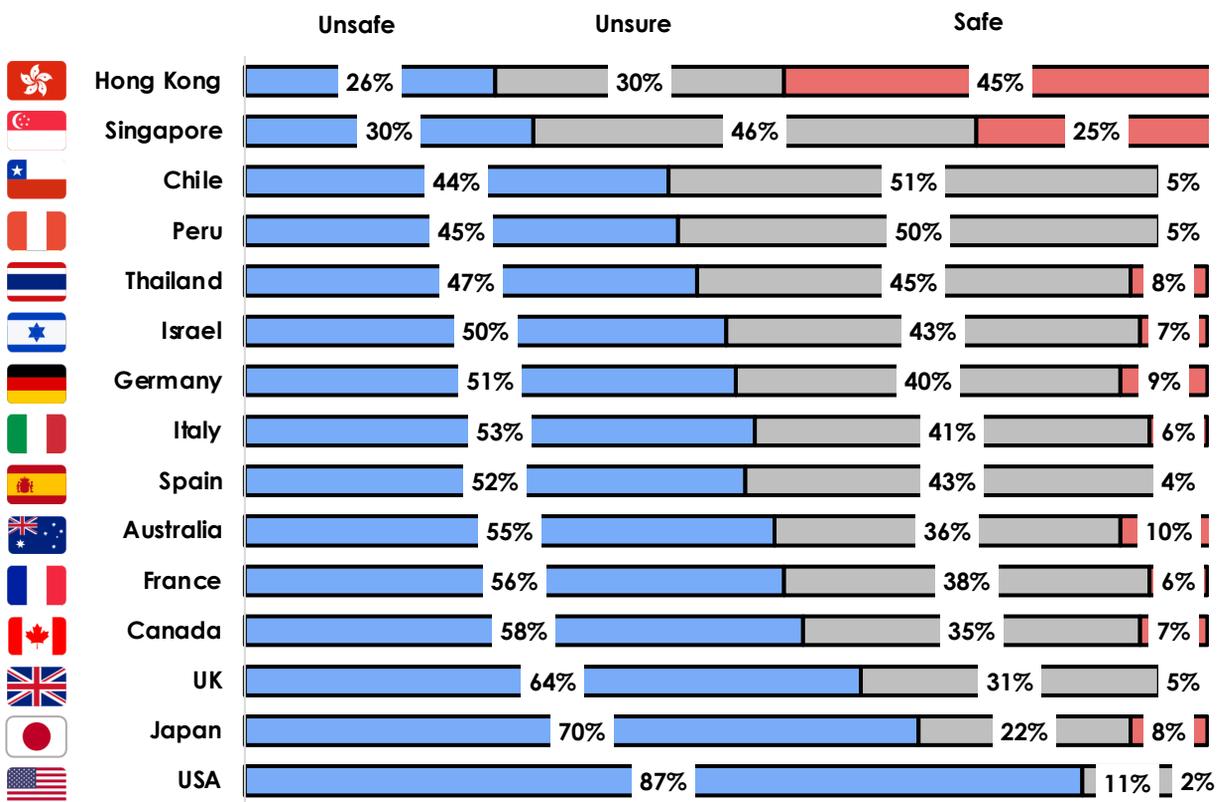
Although destinations are reaching herd immunity through vaccinations, many are still battling new cases. Latest results showed increased negative safety perceptions across all destinations compared to our previous survey. Positive perceptions were replaced by heightened uncertainty even for the highest ranked destinations.

Compared to safety perceptions in March 2021, the latest ranking shows uncertainty sweeping across all destinations, including previously ranked “relatively safe” destination – Singapore.

Japan's safety perception dropped significantly from a relatively safe level to now relatively unsafe, as rated by 70% of travelers. The US maintained an overwhelming proportion of “relatively unsafe” ratings, rising from 82% in March to 87% in this latest survey.



Figure 13. As of August 2021, how safe is it to travel to the following destinations, assuming travel is resumed?



Source: China Traveler Sentiment Report, September 2021

Note: figures may not sum to totals due to rounding

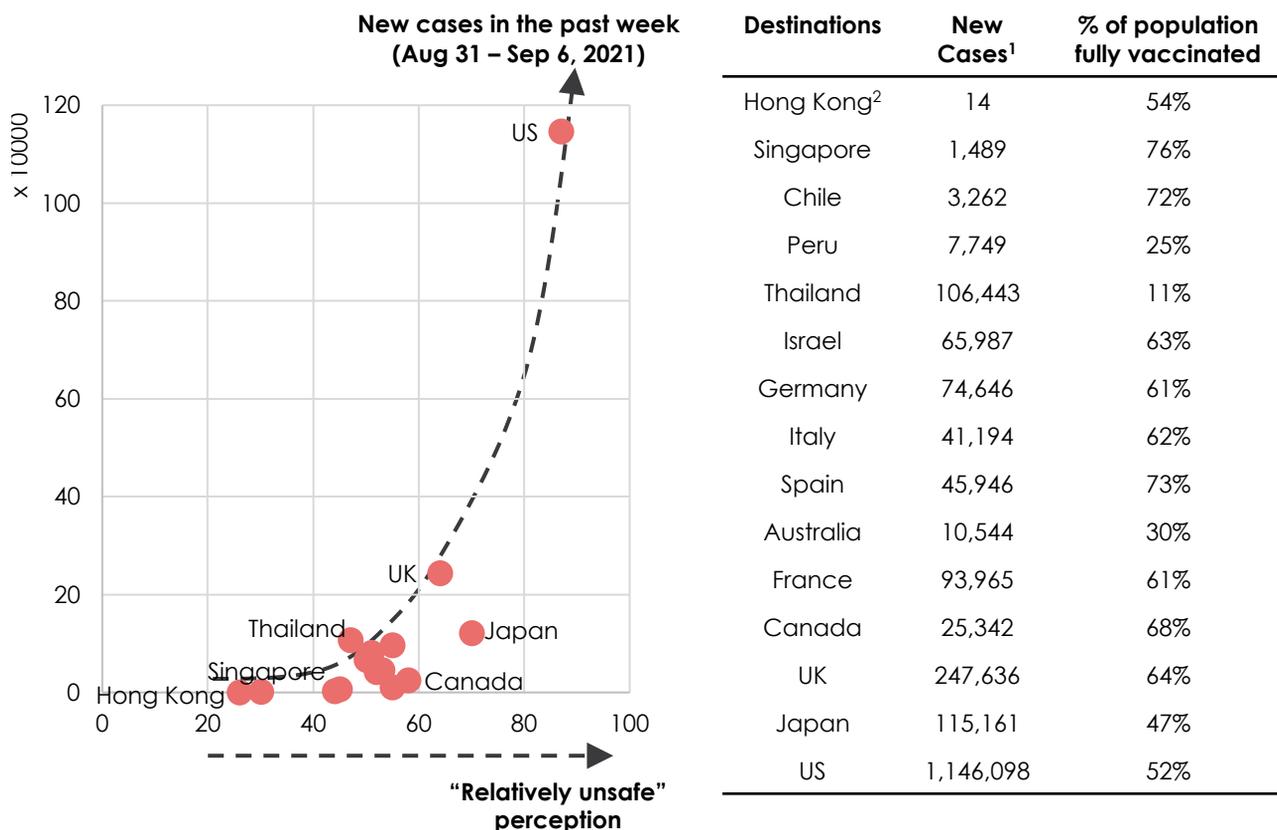
This level of uncertainty and unsafe perception is correlated with COVID cases.

A perception of a destination as "relatively unsafe" was 75% correlated with the number of new cases at that destination. Managing destinations' image of safety should prioritize pandemic control policies and effectiveness in flattening the curve.

Safety perceptions were not correlated with vaccination rates, though many destinations will soon reach herd immunity levels. This is not to say that vaccination has no effect on pandemic control. It is one of numerous factors that drive recovery, along with leadership at many levels, trust of vaccines, willingness to take self-protection measures, etc.



Figure 14. As of August 2021, how safe is it to travel to the following destinations, assuming travel is resumed?



Source: China Traveler Sentiment Report, September 2021

¹ Coronavirus Resource Center – All Regions. John Hopkins University of Medicine. Retrieved September 7, 2021 from <https://coronavirus.jhu.edu/region>

² Coronavirus Disease (COVID-19) in HK. The Government of the Hong Kong Special Administrative Region. Retrieved September 7, 2021 from <https://www.coronavirus.gov.hk/eng/index.html>





Implications

As of September 7th, 2021, mainland China's vaccination rate is 69%. At this rate, it is likely to reach herd immunity before the end of 2021. Moving forward, how do brands get ready for post-pandemic travel? What will it take to win the hearts of Chinese travelers? What changes can we expect?

- 1 Make it easy for Chinese travelers to search for outbound pandemic recovery information. Cautious travelers would evaluate destination safety and stay alert for risks when traveling.
- 2 Safety perception is correlated with the number of new cases, which is one of many reasons why destinations still have a “relatively unsafe” perception. Many outbound destinations are soon to reach herd immunity, but sharing numbers on recovery, such as reducing cases, would raise the safety profile for outbound destinations.
- 3 Safety and travel advice are pre-requisite for travel. When these are met, travel behaviors will likely resume to some form of normalcy. While cautious travelers prefer nature, beaches, and road trips, many others would still favor traditionally crowded attractions such as theme parks and landmarks.
- 4 Carefully curate content on leisure tourism to inspire future travel while also providing information on safety measures. Chinese travelers respond favorably to outbound information, but some will feel that this information is untimely and frustrating.

Appendix A

Table 1. Respondent's residence vs. travel destination for National Day

Color: popularity of routes

Destination	Residence																											
	ZJ	GD	FJ	YN	BJ	HN	SD	SH	SC	JS	HE	SN	CQ	LN	AH	JX	HB	GX	GZ	JL	TJ	HA	HL	SX	GS	TW		
Zhejiang	38	3	1		1		1	9	1	10	1				1		2											
Guangdong	1	58								1								1		1								
Fujian	3	5	28	1	1			5		2			1	1			2					1						
Yunnan	3	11	5	6	1	1	6	1	1	5	1						1		2	1	1				1	1		
Beijing	3	7	3	1	10			4	1	5	3			1		1				1	6	1				1		
Hunan	3	7	3		1	8	2	1	2	3				1		4		1					1	1				
Shandong	1	1			1		22	1	2	3	2			1				1					1		1			
Shanghai	7	3			2	1	1	7		8				1			2					1		1	1	1		
Sichuan	2	2	1	1	4	2		1	6	1	1	3	3	1	1	1		1	1			1			2	1		
Jiangsu	2				3		1	2	1	19				1	2							1				1		
Hebei		2			7						19											2						
Shaanxi			1		5		3	1	1	3	5	2		2						1	1	2		2				
Chongqing	1	1			5			1	4	2	1		9		2						1					1		
Hainan	2	3	1		3	1	2	3	1	2	1		1				3	1			1							
Liaoning	2				3					2				15						1								
Anhui	3	1								2						10				1						1		
Jiangxi	2	1	2			1		2		1			1			5												
Hubei	1	3			1	1		2		1	1						4						1					
Guangxi		3				1	2						2					5										
Tibet		1	2		1		1	2		2		2										1						
Guizhou		1		1	1					1			1						7									
Jilin										1					1						9							
Tianjin		1					1				1											6	1					
Xinjiang		2	1		2				2												1					1		
Henan					1				1								1						5					
Qinghai					1	2	1	1		1							1											
Heilongjiang					1				1	1														4				
Inner Mongolia									1	2											1		1					
Shanxi			1		2					1														1				
Ningxia			1					1																				
Macao		1													1													
Gansu																										2		
Hong Kong			2																									
Taiwan																										1		

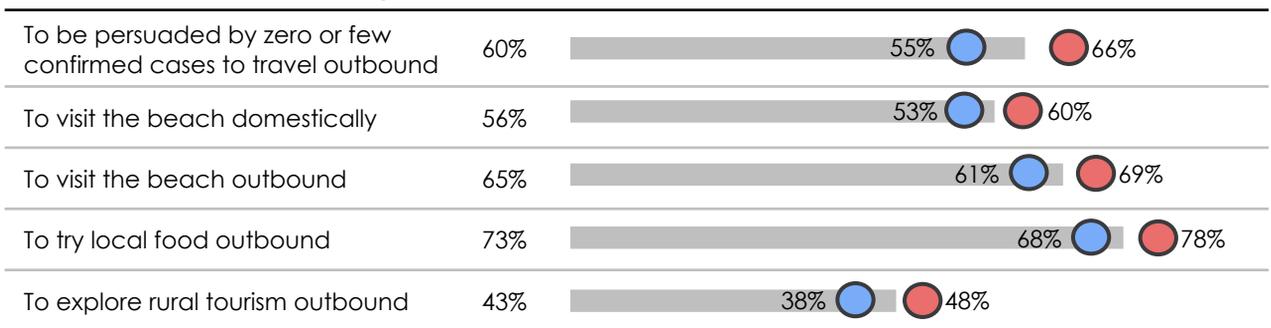
Source: China Traveler Sentiment Report, September 2021

Appendix B

Other insights relevant to this research

Table 2. Gender differences in travel behaviors

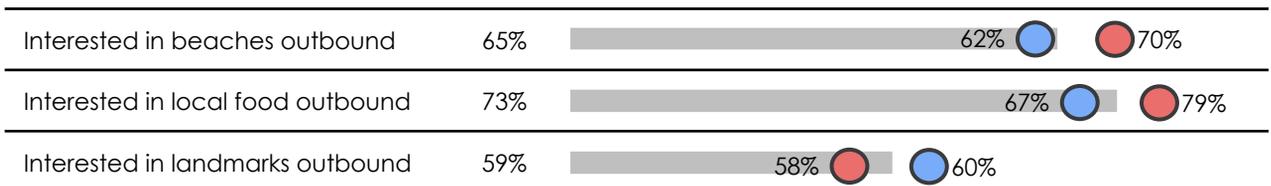
Female travelers are more likely than **male travelers** ...



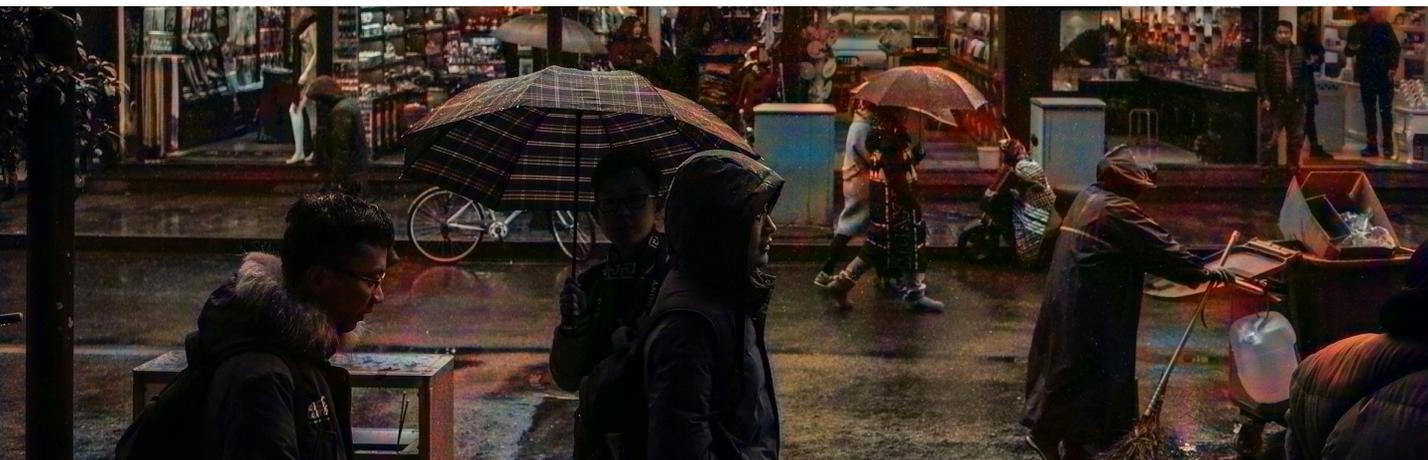
Source: China Traveler Sentiment Report, September 2021

Table 3. Influence of children on travel behaviors

Travelers with no children are more or less likely than **travelers with children** to be ...



Source: China Traveler Sentiment Report, September 2021





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ABOUT DRAGON TRAIL RESEARCH

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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