



# AWAITING THE FREEDOM OF TRAVEL

## Chinese Traveler Sentiment Report

Dragon Trail Research

April 2022

## Marketing Solutions for China and the World

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- B2B marketing
- Digital and hybrid events
- Research and strategy
- Integrated marketing representation

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## Introduction: Shifting sentiment amid ongoing restrictions and anxieties

Between 9-14 March 2022, Dragon Trail Research surveyed 1,011 mainland Chinese travelers about their travel preferences and behavior, including appraisals of outbound destinations, opinions about China's quarantine-on-arrival policy, and domestic travel experience.

The timing of our spring 2022 sentiment survey came at a point where global pandemic controls were being lifted significantly, but Chinese domestic outbreaks were on the rise. News reports in China showed the advent of war in Europe. Under these circumstances, it's not surprising that more than half of survey respondents were not planning to travel.

Yet at the same time, sentiment around "eager to travel" also grew significantly since Dragon Trail's last traveler survey in September 2021. Perceptions around the safety of international travel destinations also improved across the board – for each and every country on the list.

Quarantine-on-return remains the biggest obstacle to outbound tourism, and our spring 2022 survey reveals shifting attitudes towards this policy. Compared to September 2021, an increasing number of travelers would prefer quarantine to either be relaxed or stay the same, with fewer calling for stricter measures. At the time of writing, it has been announced that a number of cities in China will in fact reduce hotel quarantine for inbound travelers to 10 days, down from 14.

In other areas, Chinese travelers remain extremely consistent: Independent travel is now strongly preferred over traditional large-group tourism, and nature tops the list of preferred travel themes.

This report also includes a detailed look at two major travel themes for domestic Chinese tourism: Winter sports, and travel to the island province of Hainan. While both are popular – with the Beijing 2022 Winter Olympics giving a major boost to snow and ice tourism this year – our survey findings reveal significant potential for continued growth.

Despite China's zero-COVID policies and current restrictions, travelers have not lost their taste for adventure, and even appear to be relaxing their concerns about international travel – good news as the travel industry continues to await the country's long-anticipated reopening.

**Sienna Parulis-Cook**  
Director of Marketing & Communications  
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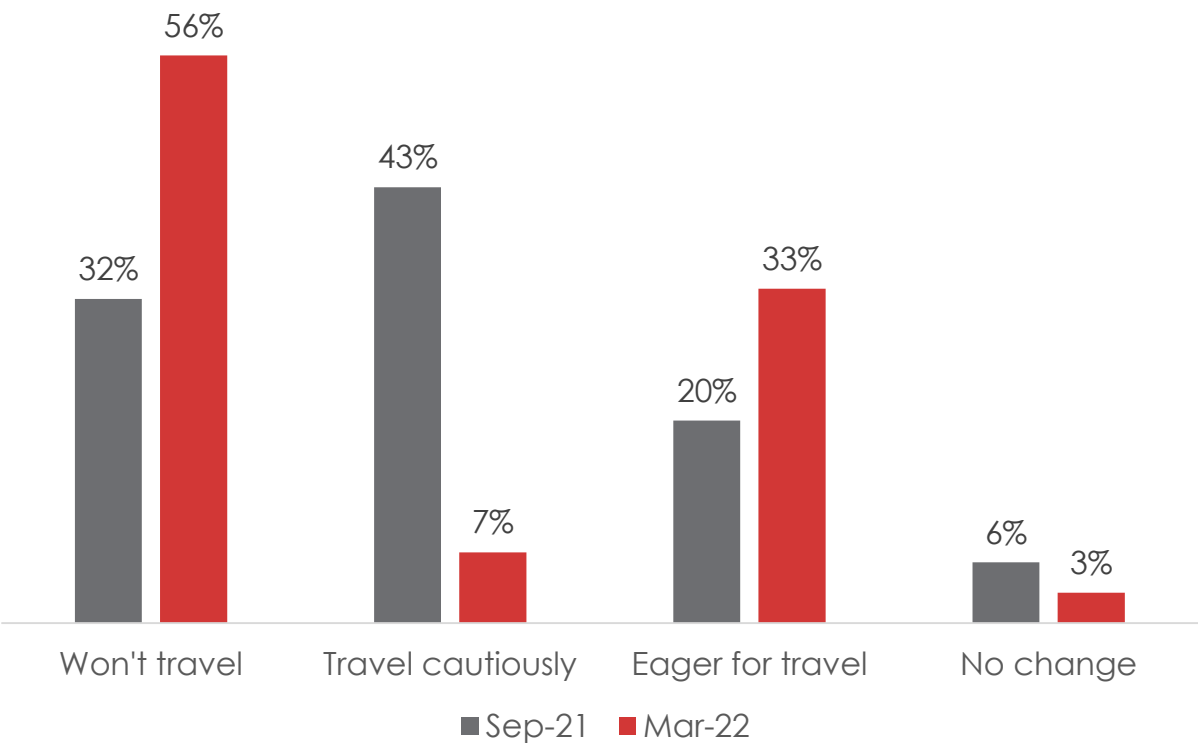
**Mengfan Wang**  
Manager of Research  
Dragon Trail International

## Travel remains on hold for most, but eagerness to travel is on the rise

During the survey period of March 2022, pandemic controls were being lifted around the world, while outbreaks were growing in China, and Russia had invaded Ukraine just a few weeks earlier. These are all reasons for a significant increase in those who said they “won’t travel”, compared to our September 2021 survey. Under the current environment, many travelers’ level of caution and fear grew, and they opted to wait to travel at a later time.

On the other hand, sentiment around “eager for travel” also increased significantly since September 2021. After two years of the pandemic, strict travel controls, and the fluctuations of domestic outbreaks, Chinese consumers yearn for the opportunity to travel. Many have enjoyed domestic natural scenery and cultural experiences. Travel motivation is strong, though time and money are still barriers during outbreaks.

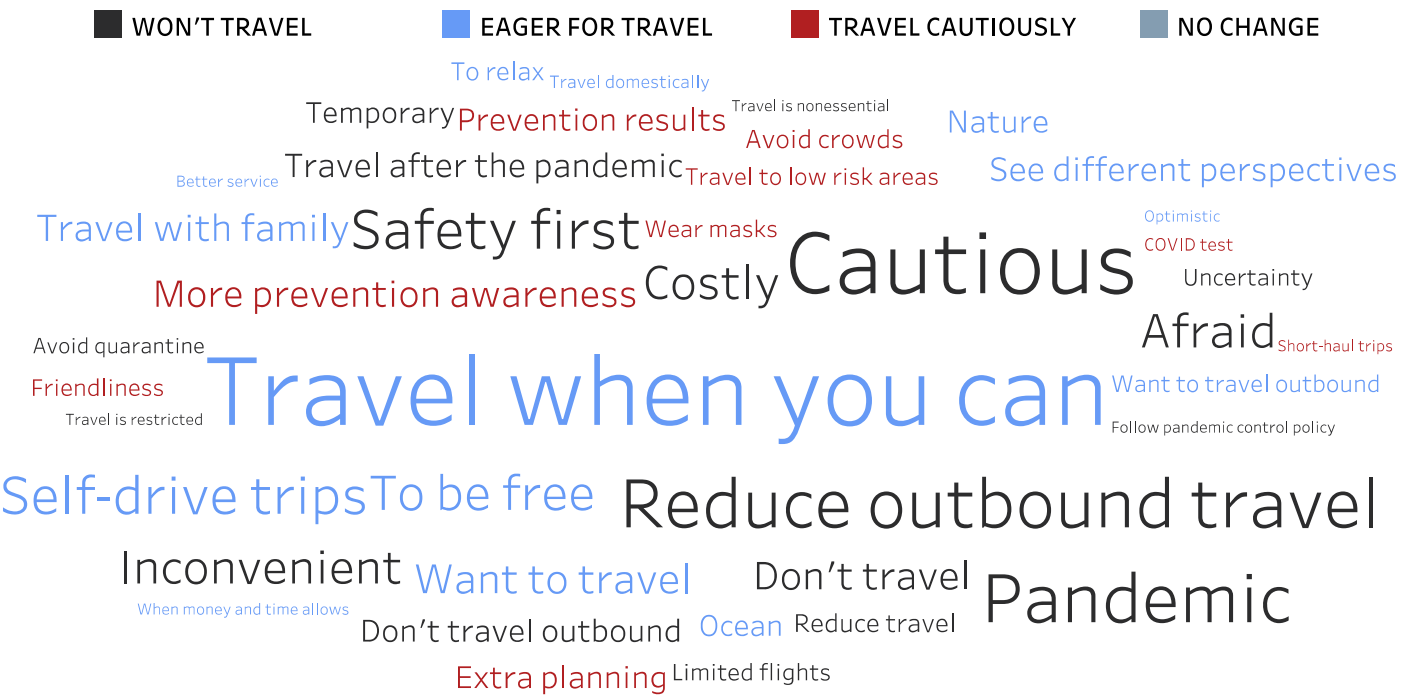
### Chinese travelers: How has your attitude toward travel changed since the pandemic?



# Two years into the pandemic, traveler sentiment shows a mix of caution and frustration

Quarantine, strict pandemic control policies, and inconvenience were mentioned as barriers to travel, indicating growing attention to and frustration with obstacles to travel. Nature, relaxation, time with family, and the freedom travel brings are all drivers for those looking to travel when they can.

## Chinese travelers: How has your attitude toward travel changed since the pandemic?

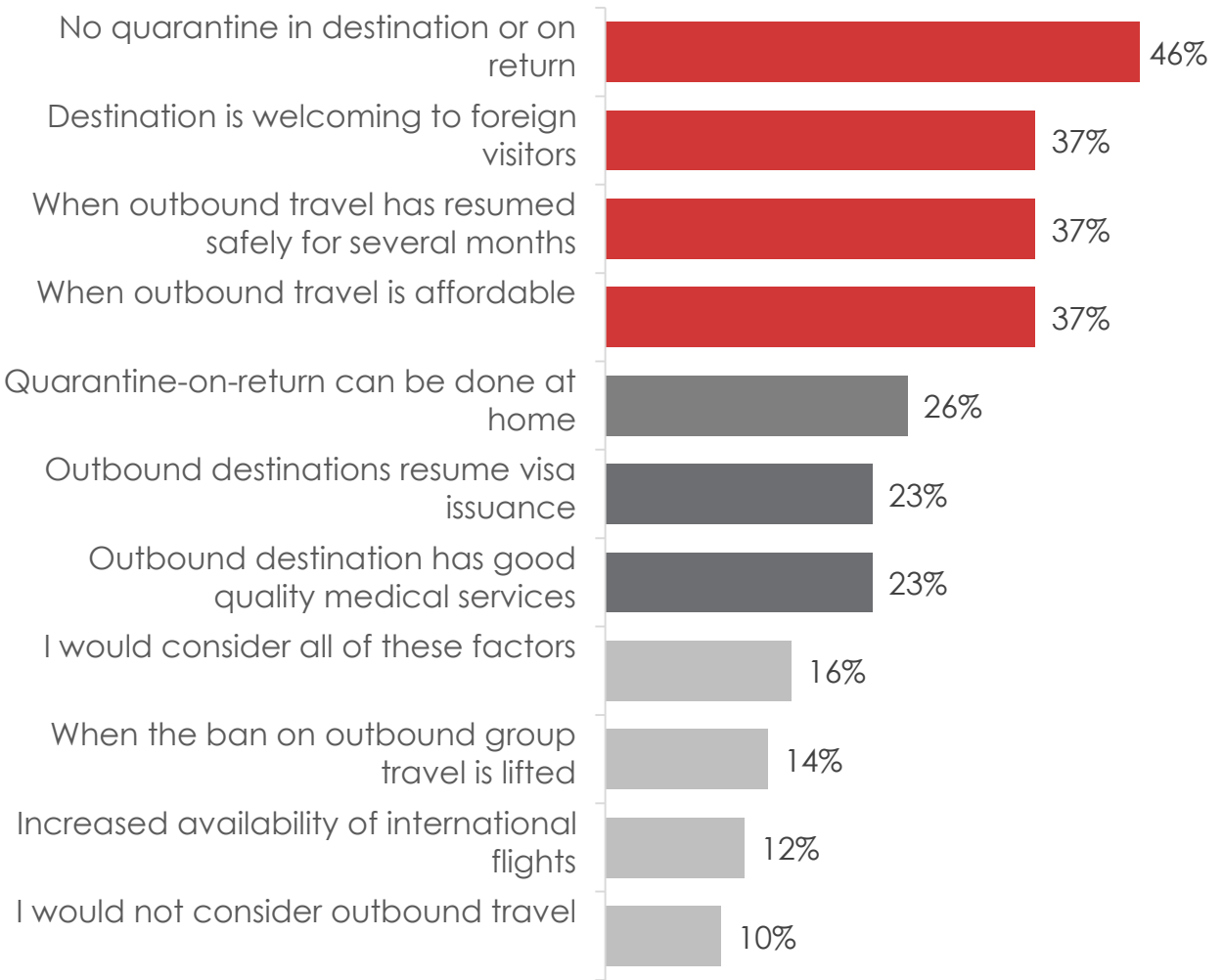


# Quarantine remains the biggest obstacle to outbound travel

Quarantine, safety and destination friendliness are still the top barriers and incentives for outbound travel, though the influence of these factors has reduced from our September 2021 survey.

The impact of incentives for outbound travel in order are: quarantine > friendliness > safety > pricing. In other words, time, money, and the basic requirements of travel all need to be met before outbound travel is considered.

## Chinese travelers: What would make you consider outbound travel?

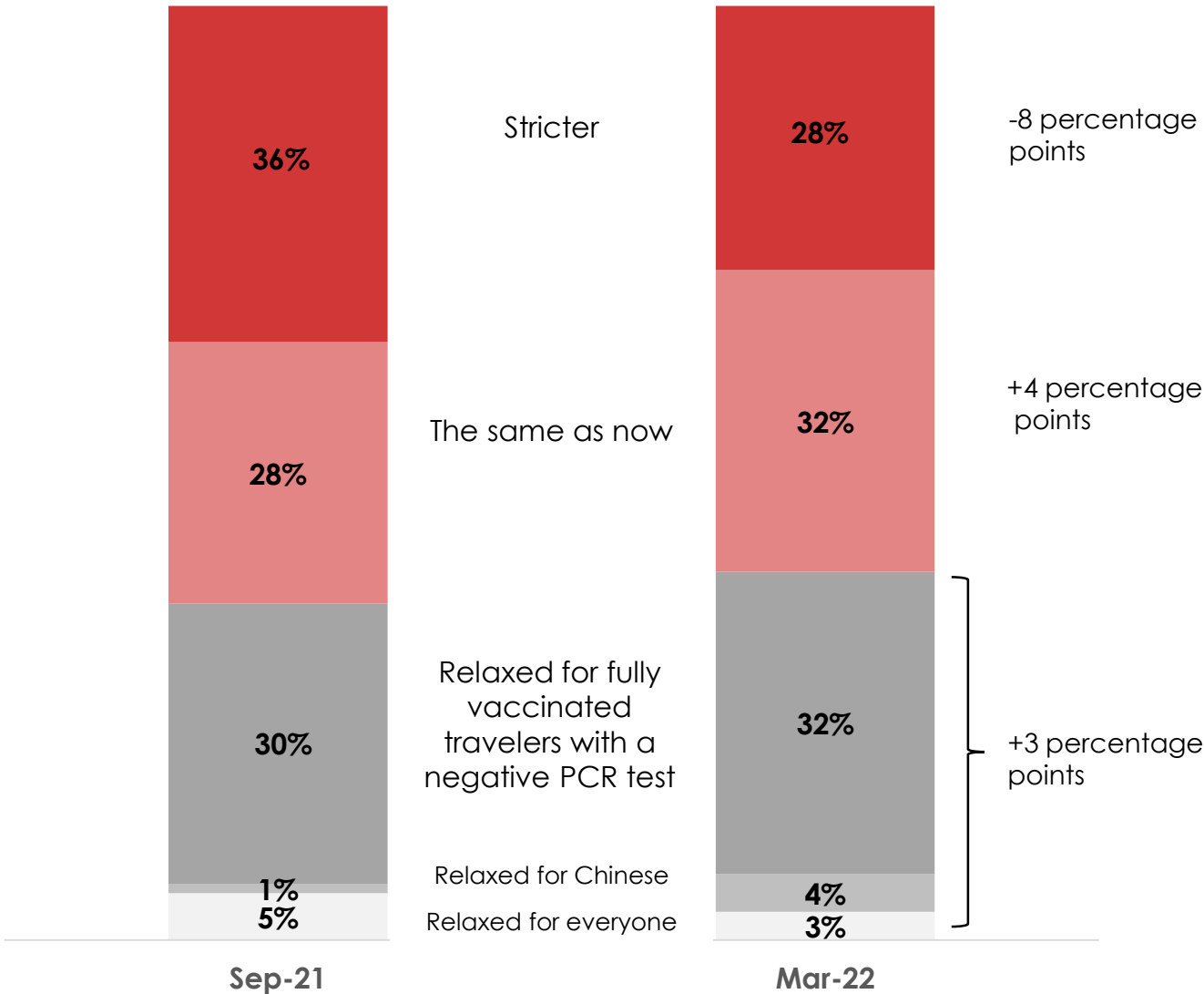


## Attitudes to quarantine policy are changing

When it comes to China's quarantine-on-arrival policy, 60% of mainland travelers still prefer it to remain the same or become even stricter. However, compared to September 2021, those supporting a stricter policy have dropped from 36% to 28%. Instead, more wish it to remain the same, with 28% in September 2021 and 32% in March 2022. The proportion who would like to see restrictions relaxed has risen as well.

As of April 2022, eight Chinese cities have relaxed their quarantine-on-arrival policies, to 10 days in hotel quarantine plus 7 days of health monitoring at home.

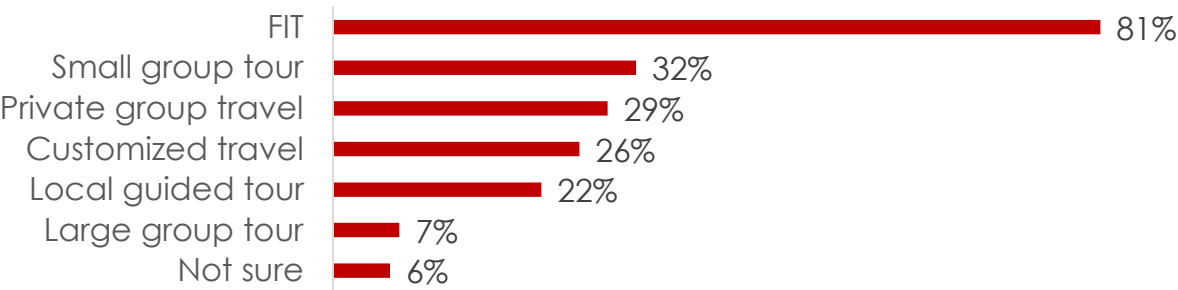
### Chinese travelers – In your opinion, quarantine on arrival should be:



# Independent travel and nature tourism remain top preferences for Chinese consumers

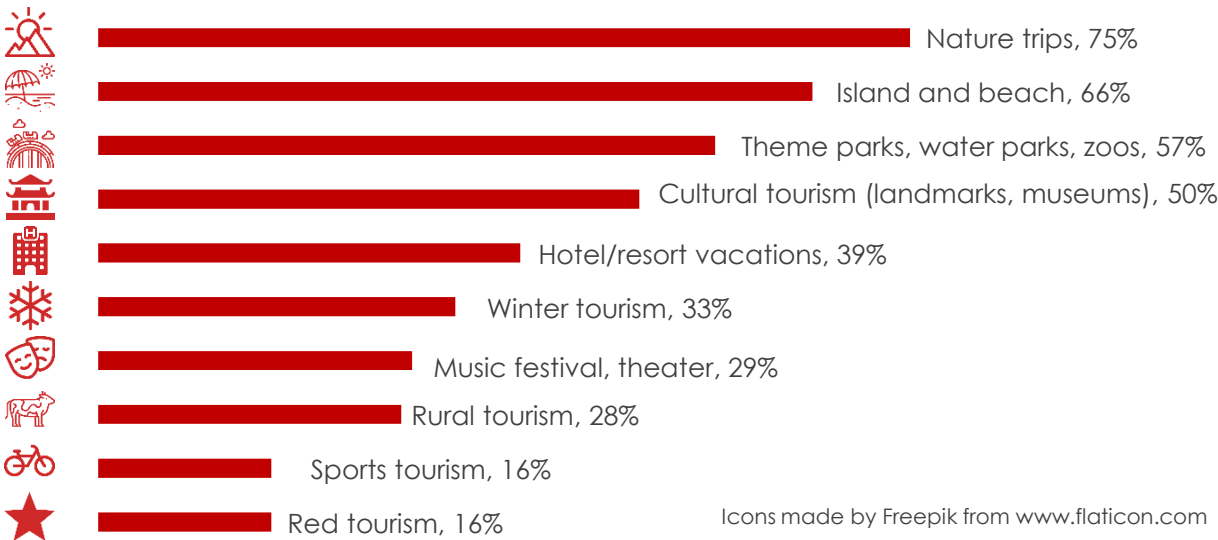
81% of Chinese mainland travelers prefer fully independent travel (FIT) – the exact same result as in our September 2021 survey. The popularity of customized groups, small tour groups, and local guided tours have all increased compared to previous survey results.

## Chinese consumers: What's your preferred way to travel?



Nature trips continue to be the number one preferred travel theme, the same as in previous surveys. The order of travel themes largely remains unchanged, with the exception of winter tourism, which saw an increase in interest compared to September 2021. This is likely attributable to the Beijing 2022 Winter Olympics.

## China: Preferred travel themes





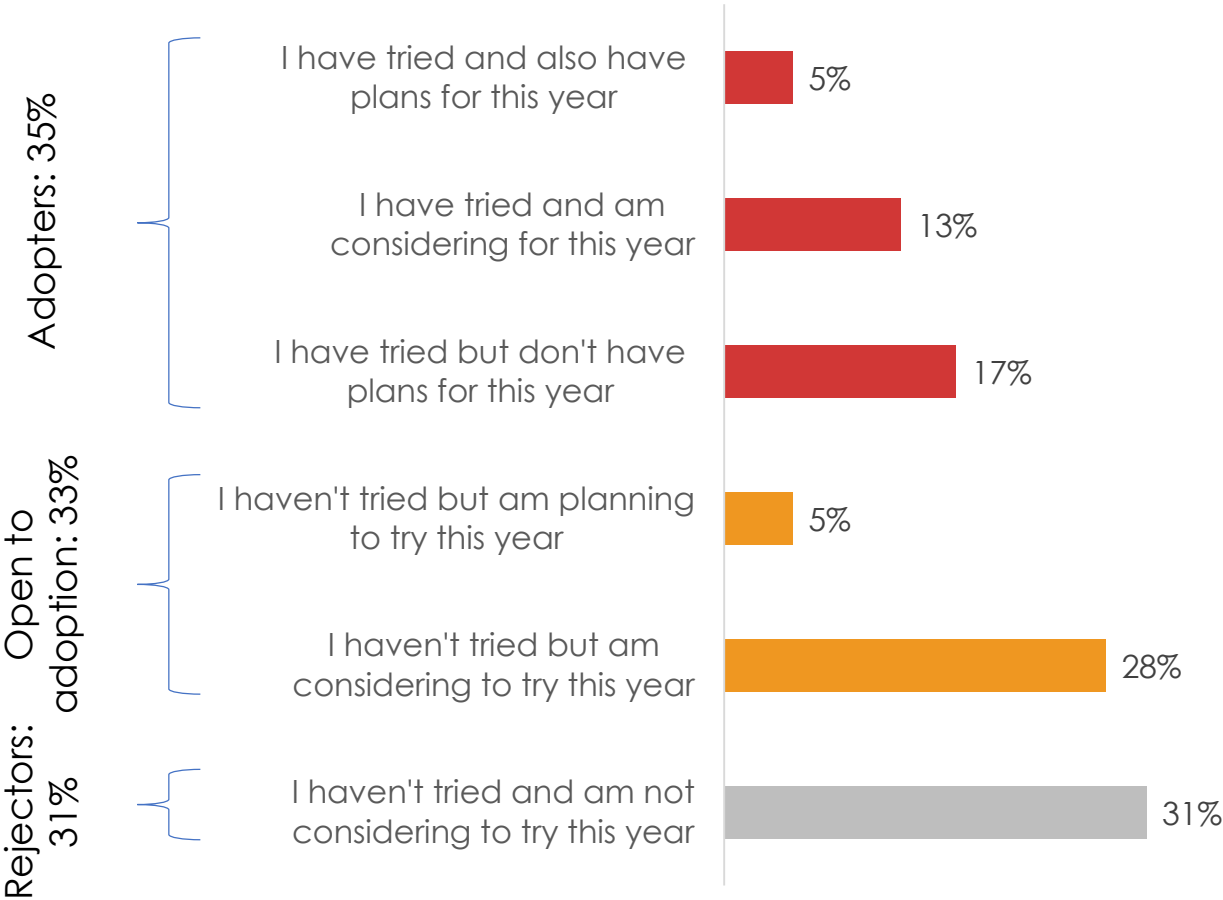
# China’s winter sports market still has much potential to grow

After the Beijing 2022 Winter Olympics and record participation in winter sports during the past year, what are the prospects for continued growth in China's winter sports market?

We used a behavioral change curve to see where Chinese mainland travelers stand in terms of winter sports. This concept helps us understand the popularity of winter sports among travelers, in order to further measure its change in the future.

Approximately one-third of mainland travelers are adopters of winter sports, but only 5% of these had plans to experience winter sports this year. Another third are open to the idea, and might need further encouragement to make travel plans. The remaining one-third of travelers have not thought about winter sports, and will need additional exposure to the idea in the future.

## Chinese Travelers: Winter Sports Experience and Plans

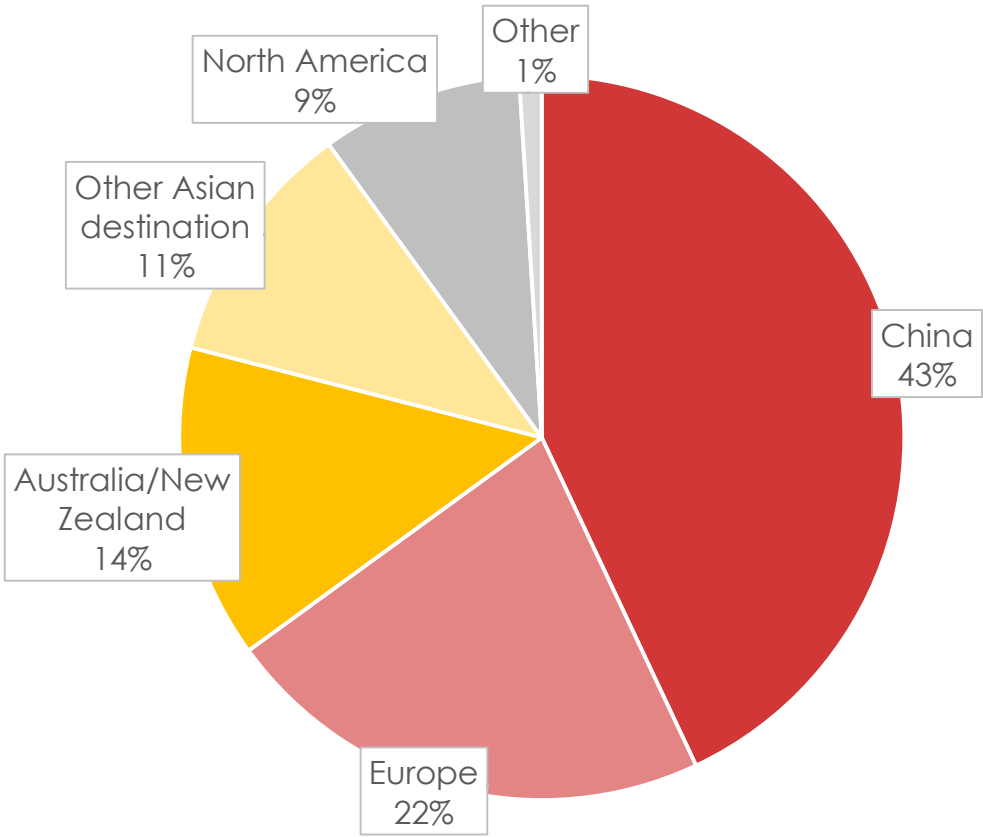


## Demographics of winter sports, plus top outbound winter sports destinations

Adopters of winter sports are more likely to come from first and new first-tier cities than second-tier cities, while rejectors are more likely to come from second-tier cities. There is not a substantial difference among those who are open to adoption.

Female travelers are less likely than male to have tried winter sports (31.5% vs. 38.3%). But among survey respondents who hadn't tried winter sports, women are more likely to be open to adoption (38.3% vs. 27.3% of men) and less likely to be rejectors.

### Chinese Travelers: Preferred Winter Sports Destination



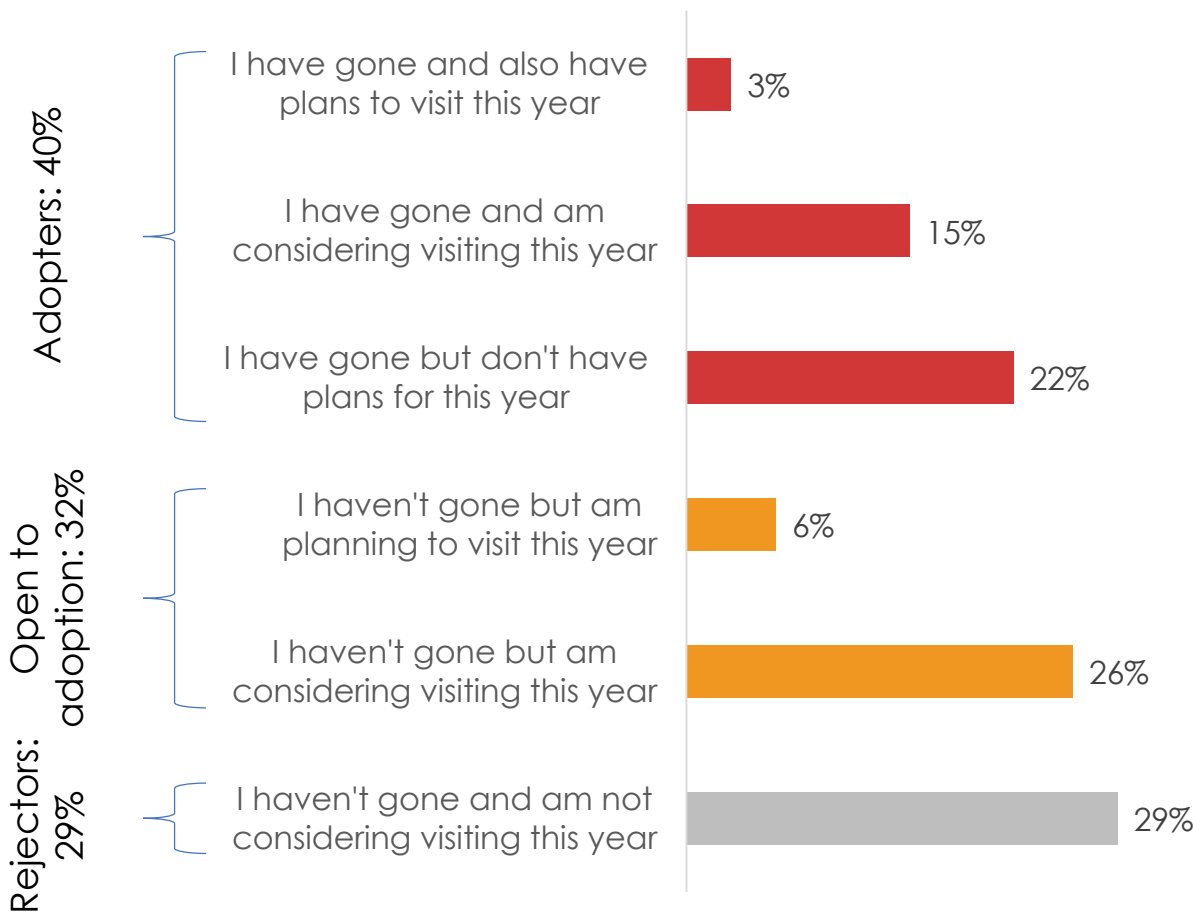
Even if travel policies allowed for outbound trips, close to half of our survey respondents would still choose China as their preferred destination for winter sports. Europe came in second, chosen by more than one-fifth of respondents.

# Hainan has appeal for almost three-quarters of Chinese travelers

An island province in southern China, Hainan has been one of the top domestic tourism destinations in recent years. In addition to plentiful beaches and resorts, Hainan also boasts a booming duty-free retail market, with annual tax-free shopping of up to RMB100,000 (US\$15,000) per person.

40% of survey respondents had visited Hainan in the past, and an additional 32% were open to the idea. Residents of first- and new first-tier cities were more likely to have visited, consider visiting, or planned to visit, compared to those in second-tier cities.

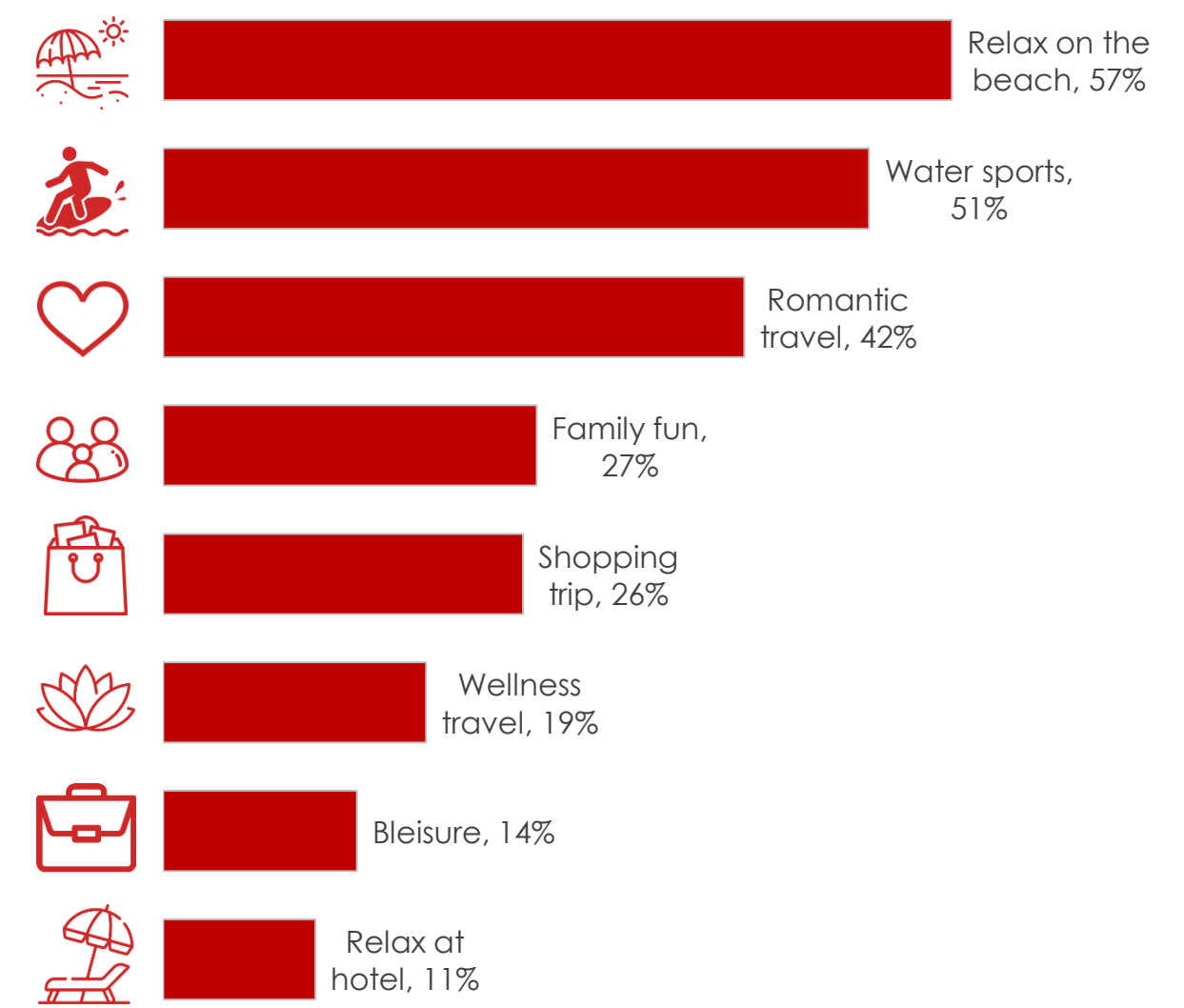
## Chinese Travelers: Hainan Travel Experience and Plans



# Sand and surf more important than shopping for travelers to Hainan

While more than a quarter of respondents said that shopping was a reason to visit Hainan, this was not the main motivation for most travelers. 57% said their reason for visiting would be relaxing on the beach, with 51% choosing water sports, 42% choosing romance, and 27% seeing the island as a family holiday destination.

## Chinese Travelers: Reasons for Visiting Hainan



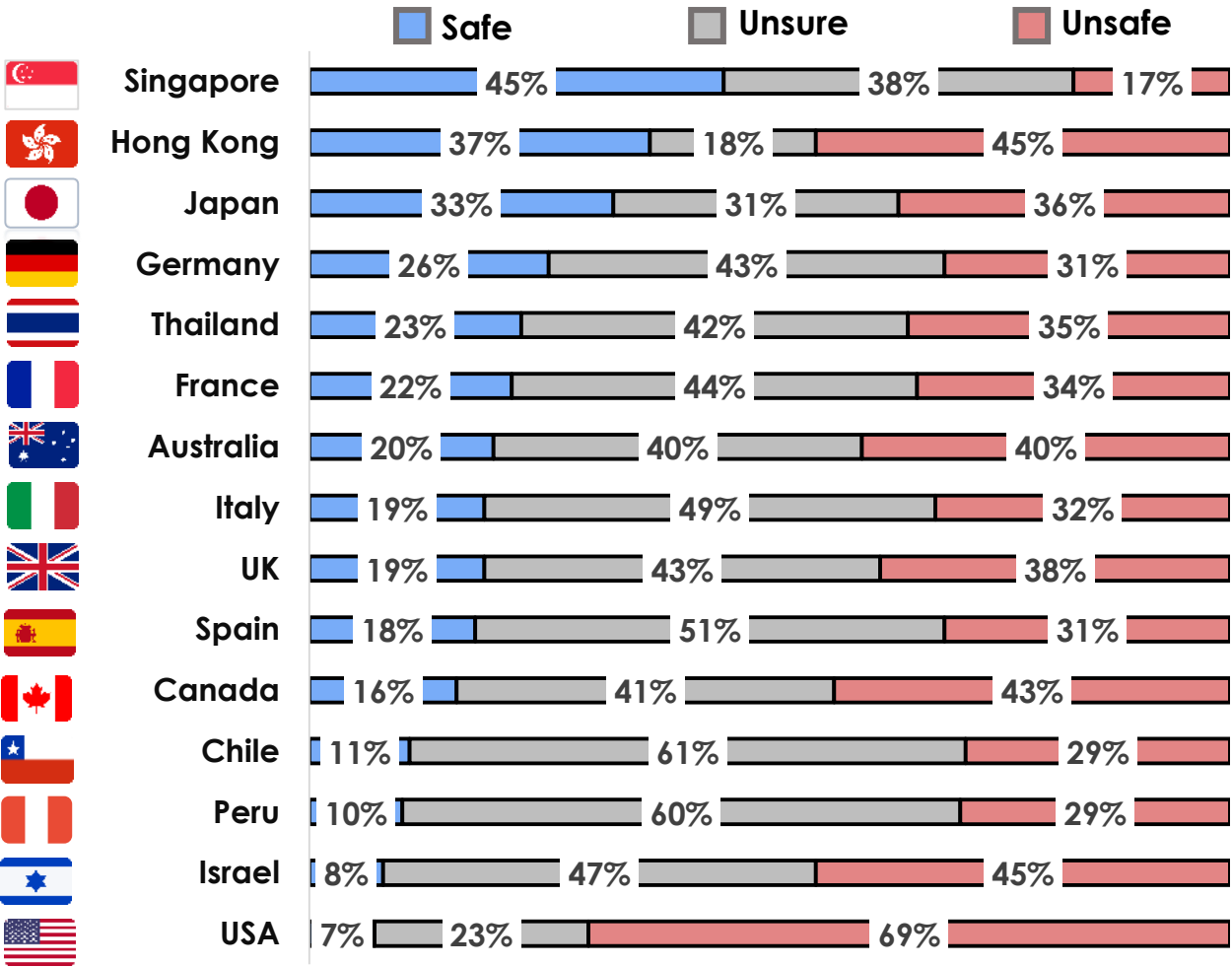
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## Safety perceptions of international destinations have improved across the board

We asked survey respondents to rank the safety of 15 outbound destinations. With the exception of Hong Kong, travelers' perceptions of outbound destinations as being "unsafe" have decreased across the board, with increasing numbers categorizing the destinations either as "safe" or "unsure".

Japan saw the most significant increase in safety perception. In September 2021, following the Tokyo Olympics, 70% of respondents ranked Japan as "unsafe" and only 8% as "safe." Now, 36% see Japan as "safe," with one-third choosing "unsafe." Even the US – which has ranked as most "unsafe" in all of Dragon Trail's sentiment surveys – has seen an improvement, with 7% categorizing it as "safe," compared to 69% as "unsafe." Just six months earlier, 87% saw the US as "unsafe". As in previous surveys, Singapore was ranked as the safest destination beyond Greater China.

### How safe is it to travel to the following destinations?



## Outbound destination preferences: Japan, Thailand, Australia, and France top the list

Top destinations for both overall travelers and experienced outbound travelers are consistently: Japan, Thailand, France, South Korea and Australia – a diverse list in both geography and environment.

For overall mainland Chinese travelers, Hong Kong will be a much anticipated destination once travel restrictions are lifted.

### If restrictions allowed, where would you most like to travel?

	Overall travelers <sup>1</sup>	Repeat vs. 1st Time
#1	Japan	37% vs. 63%
#2	Hong Kong	20% vs. 78%
#3	Thailand	44% vs. 54%
#4	France	8% vs. 92%
#5	Australia	14% vs. 86%
#6	Maldives	11% vs. 86%
#7	Russia	21% vs. 79%
#8	South Korea	13% vs. 83%

	Outbound travelers <sup>2</sup>	Repeat vs. 1st Time <sup>3</sup>
#1	Japan	59% vs. 41%
#2	Thailand	52% vs. 48%
#3	Australia	20% vs. 80%
#4	France	19% vs. 81%
#5	South Korea	52% vs. 48%
#6	USA	57% vs. 43%
#7	Germany	32% vs. 68%
#8	Singapore	34% vs. 66%

<sup>1</sup> 24% of respondents in this survey have outbound travel experience, n=244.

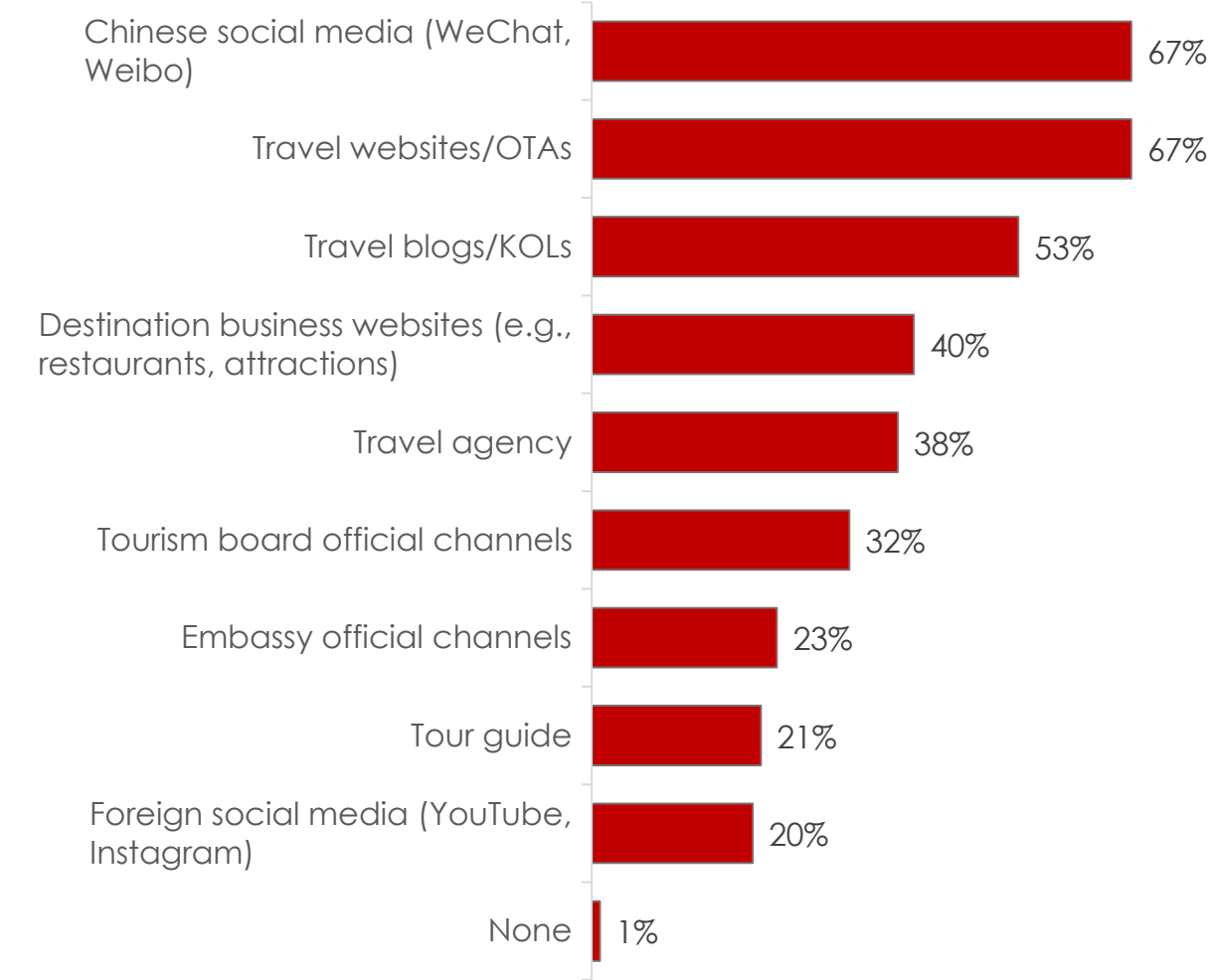
<sup>2</sup> Source: November & December Market Monitor results (DT Research)

<sup>3</sup> Source: December Market Monitor results (DT Research)

# Online sources remain the leading channels for travel destination information

Chinese social media platforms, websites, and OTAs continue to be the leading channels for consumers to access travel destination information. This emphasizes the ongoing importance of using Chinese digital channels to reach potential visitors. Travel bloggers are also preferred by over half of mainland travelers.

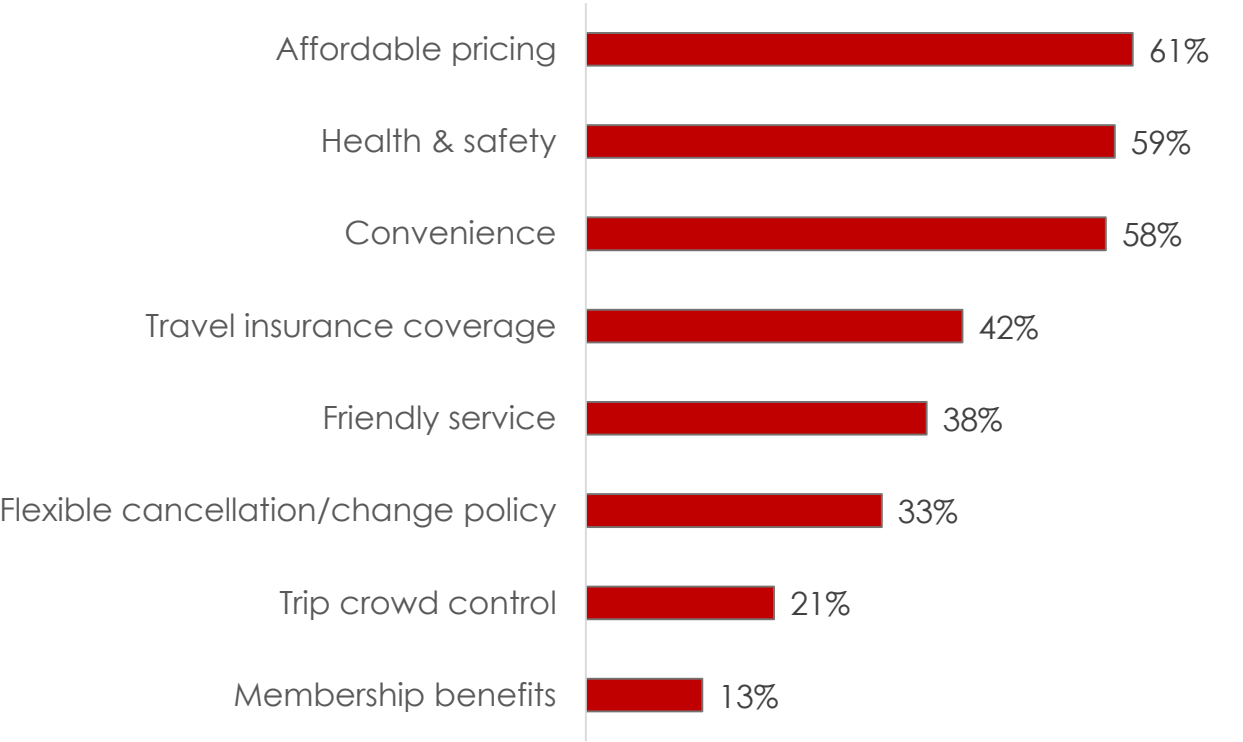
## Chinese Travelers: Channels Used for Destination Information



## Pricing, safety, and convenience most important for travel products

When it comes to travel products, pricing and safety elements are vital, which reiterates the need for these incentives to be met. In addition, convenience needs to be addressed in travel products to provide further motivation for travel.

### Product Preferences for Chinese Travelers



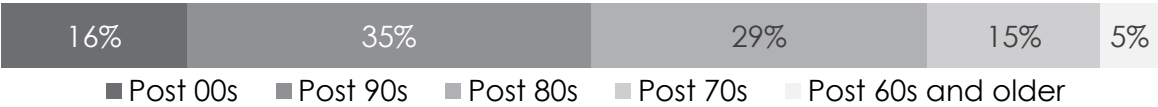


## Methodology

From March 9-14, 2022, Dragon Trail Research conducted a 26-question survey on the overall sentiment of mainland Chinese travelers, using Tencent's survey panel. Our data cleaning process identified and removed invalid responses, resulting in a total of 1,011 valid responses.

Target respondents were selected from a total of 49 tier 1, new tier 1 and tier 2 cities. Respondent age and gender were controlled with quotas.

### Age



### Gender



### City of residence



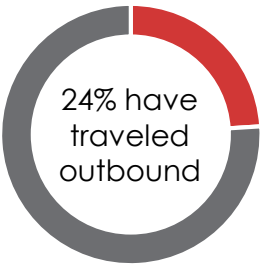
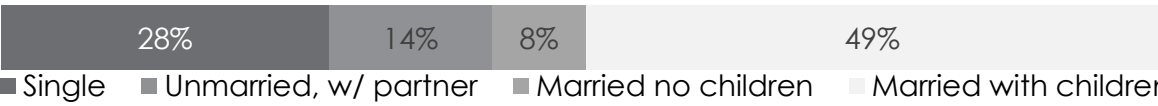
### Education



### Monthly salary (RMB)

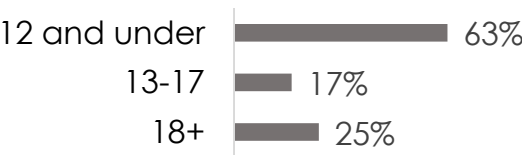


### Family



All survey respondents had interest in travel. 24% had previously traveled outbound.

### Age of Children





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