



NEW PERSPECTIVES FOR A NEW ERA

Chinese Traveler Sentiment Report

Dragon Trail Research

September 2023



Photo by Mika Baumeister, Unsplash

Marketing Solutions for China and the World

Dragon Trail International creates digital solutions to propel your expansion into new markets, connecting you with new customers and partners. With more than a decade of experience, our international team of digital and marketing specialists helps leading brands around the world to become more globally connected and competitive.



OUR SERVICES:

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

SELECTED CLIENTS:



How can we take your business into the future?

Less than one year after China's reopening, traveler sentiment has changed considerably

After nearly three years during which non-essential outbound travel was strongly discouraged, mainland China reopened in January 2023. Official advice around individual leisure travel changed, and passport renewals started up again. But the long-awaited return of the Chinese outbound tourism market has been gradual so far, impacted by factors like flight capacity and continued restrictions on the sale of group and package travel. Looking towards Mid-Autumn Festival and China's National Day on 1 October, there are reasons for optimism. The number of border crossings has picked up consistently throughout the year. As of 10 September, international flight capacity in China is up to 49.2% of 2019's volume. And from 10 August 2023, Chinese travel agents can sell outbound group tours and packages to even more countries than they could pre-pandemic.

But what about Chinese travelers themselves? What are their plans and sentiments around outbound travel in the rest of this year and beyond? What is motivating their trips, or holding them back? From 4-11 August 2023, Dragon Trail Research surveyed 999 mainland Chinese travelers. The results of our survey reveal both consistencies – particularly in reasons for traveling outbound and destination information sources – and major changes in Chinese travelers' outlook. Our resulting report is intended to illuminate these trends and help guide destinations and travel brands in their marketing, products, and services developed for Chinese outbound travelers.

As destinations around the world have likely experienced first-hand, our survey results reveal that actual outbound travel volume in 2023 remained low as of August. Only 4% of our respondents had taken advantage of reopened borders, with an additional 9% having booked an outbound trip for later in the year. But attitudes towards outbound travel remain positive – only one-fifth said they would definitely not travel outbound in 2023 (p5).

Over the last year, our research reveals some radical changes in Chinese traveler sentiment about the risks of traveling abroad. Fear of COVID infection overseas has plummeted since January 2023 (p12). Destinations all over the world are almost universally seen as much safer than they were in 2022 and 2021 (p20). This bodes well for continued recovery, with travelers unafraid to venture outbound again.

This edition of Dragon Trail's Chinese Traveler Sentiment Report also offers in-depth, qualitative information for long-haul destinations around the world, to help better understand consumer awareness and motivations. For spotlights on Africa, the Middle East, Europe, Oceania, North America, and Latin America, turn to pp14-19.

Janice Meng
Market Research Analyst

Tiana Tian
Market Research Analyst

Sienna Parulis-Cook
Director of Marketing
and Communications

Chinese traveler survey findings: Our 7 top takeaways from the report

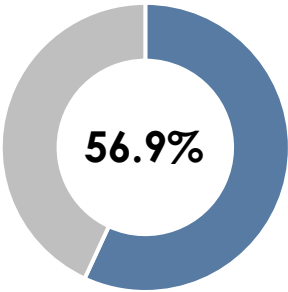
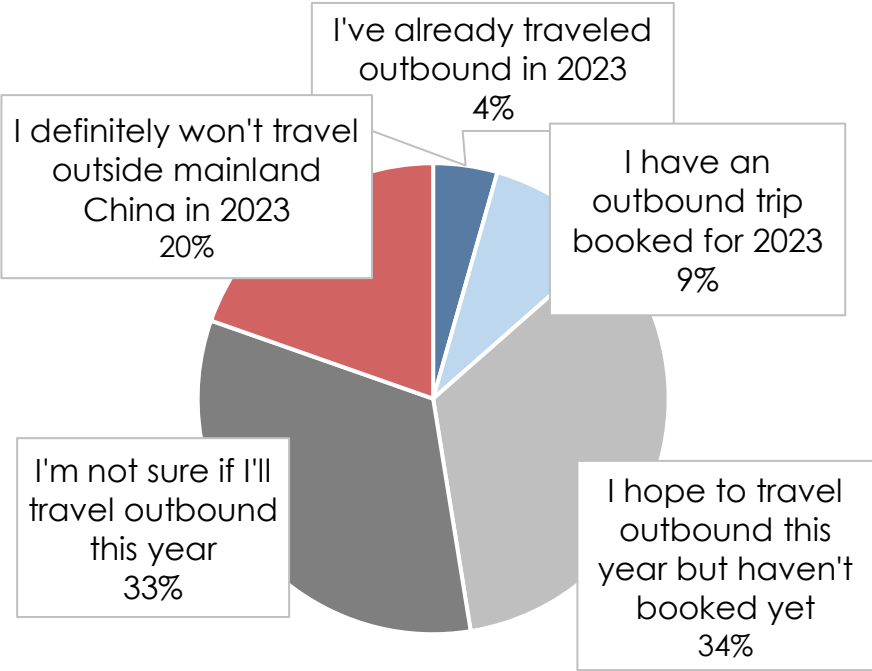
- 1) Consumers are interested in outbound travel, but few have taken a trip in 2023**
Only 4% of our survey respondents have actually taken advantage of China's reopened borders in 2023 to make a trip outside mainland China, with a further 9% having booked outbound travel for later in 2023. But attitudes towards outbound travel are positive, with 34% hoping to travel outside mainland China in 2023, 33% undecided, and only 20% having ruled out the idea.
- 2) COVID is no longer a significant concern impacting international travel**
Since the start of 2023, attitudes around COVID risk and traveling abroad have changed dramatically. Now, only 11.2% cite risk of COVID infection as a reason not to travel outbound, down from over half in our January survey. Instead, personal finances remain the biggest obstacle, alongside time constraints and concerns about safety.
- 3) Safety perceptions of most outbound destinations have radically improved**
Compared to 2022, travelers' assessments of destination safety around the world have improved radically. Places previously deemed as "safe", such as Hong Kong and Singapore, are seen as even safer now. Meanwhile, the US is rated by only 39% of travelers as "unsafe", down from 87% in September 2021. Only Thailand has become less safe in the eyes of Chinese travelers since November 2022.
- 4) Safety concerns center around personal security, with proactive personal solutions**
What does "safety" mean to Chinese outbound travelers? 95% said they worried about personal security, including theft and assault. These fears are an important motivation behind joining group tours, as well as buying travel insurance.
- 5) Northeast Asia is more popular than ever, while Europe maintains appeal**
South Korea tops the wish-list of travel destinations for 2023, a particular positive sign for the country's recovery of inbound Chinese tourism now that group travel has been allowed for the first time since 2017. Europe remains by far the most coveted region for long-haul tourism, with Iceland emerging as a dark horse destination thanks to trending content on Chinese social media platforms in 2023.
- 6) Chinese social media are the top source of destination information**
72% of survey respondents looked to Chinese social media platforms like WeChat, Weibo, and Xiaohongshu for information on outbound travel destinations. The other most trusted information sources included travel agents and tour operators, friends and family, and KOLs and travel websites.
- 7) Around the world, natural scenery, wildlife, and iconic landmarks stand out**
In a special deep-dive into the appeal of long-haul destinations, we asked travelers what they hoped to see and do in six world regions. Although these spanned diverse and distant continents, natural scenery and iconic cultural landmarks stood out everywhere. Waterfalls, jungles, grasslands, mountains, canyons, oceans, and deserts top Chinese travelers' bucket lists around the world.

As of August, Chinese outbound travel plans for this year remained largely unconfirmed

Although nearly 57% of survey respondents have experience traveling outside of mainland China in the past, the number with definite outbound travel plans for this year was very small – by August 2023, just 4% had already traveled outbound since China reopened in January, and a further 9% had an outbound trip booked. However, more than one-third of respondents said they still hoped to travel outbound this year but hadn't booked yet, with an additional 33% unsure about their plans. Only 20% said they definitely do not plan to travel overseas this year.

Have you traveled outside of mainland China in 2023?

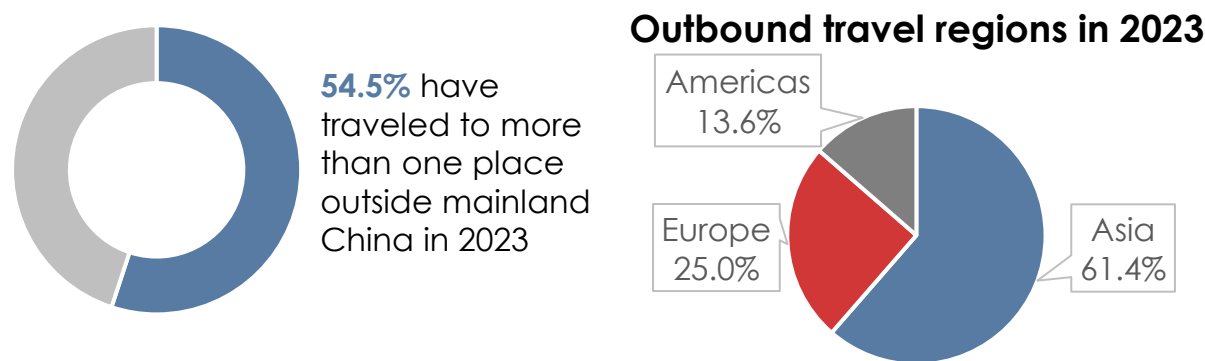
N=999



56.9% of the 999 survey respondents have traveled outside mainland China before

More than half of Chinese outbound travelers in 2023 have visited more than one destination

Those survey respondents who have already left the country in 2023 are active and avid travelers, with 54.5% having visited two or more different outbound destinations. 61.4% have traveled within Asia, with 25% going to Europe, and 13.6% the Americas. Hong Kong, Japan, Macau, and Thailand are unsurprisingly the most popular outbound destinations, but the list of countries visited is extremely diverse, ranging from Argentina to Iceland to the Maldives.



Where did you travel on your last outbound trip in 2023? (N=44)

Destination		%
#1	Hong Kong	15.9%
#2	Japan	13.6%
#3	Macau	11.4%
#4	Thailand	11.4%
#5	Denmark	6.8%
#6	USA	6.8%
#7	Canada	4.5%

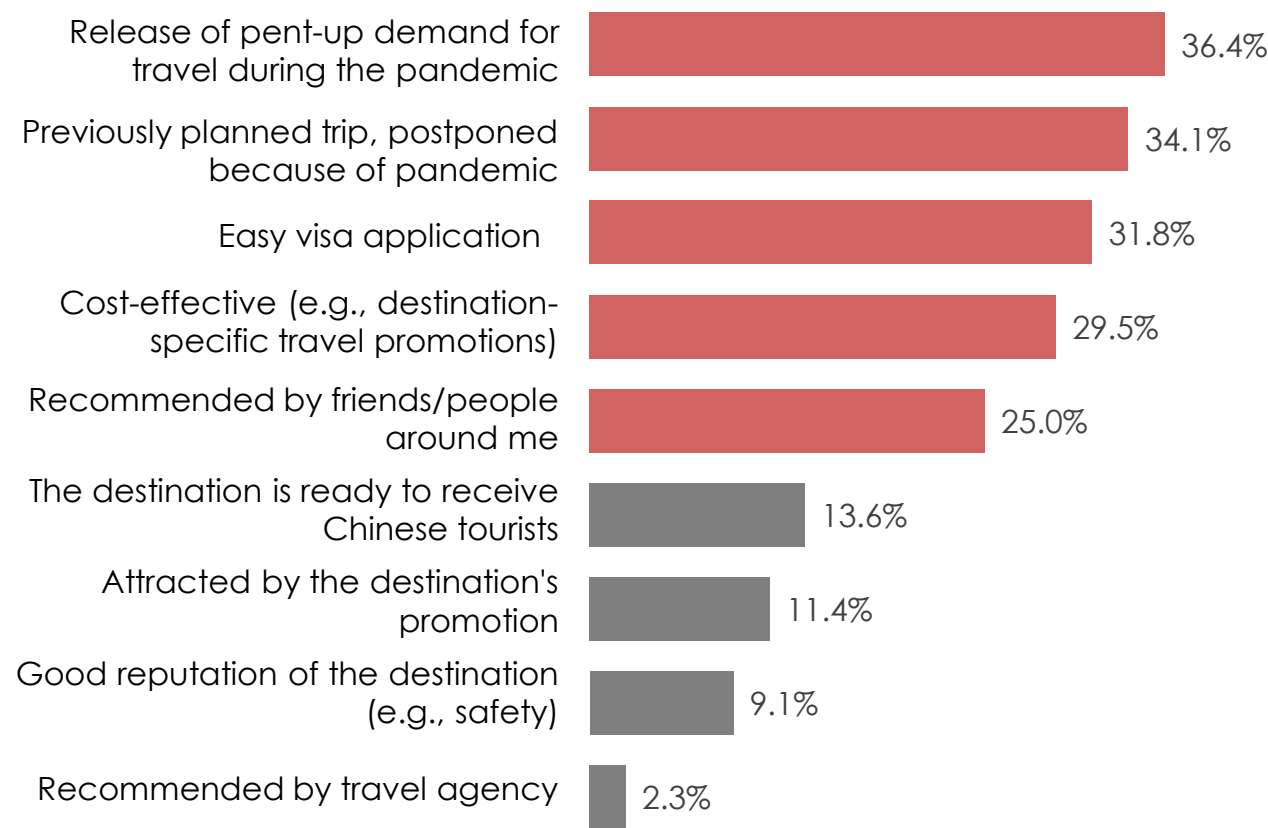
Respondents had also visited: Argentina, Cambodia, Finland, France, Germany, Iceland, Indonesia, Italy, Malaysia, the Maldives, Russia, Spain, and the UK

For the first post-COVID Chinese tourists, pent-up demand and postponed trips drive travel

What's motivating the destination choices of the first Chinese outbound travelers in 2023? The top reasons are the release of pent-up demand for outbound travel after the pandemic (36.4%), and finally taking long-awaited and postponed trips (34.1%). Other important factors behind destination choice in 2023 include easy visa application processes (31.8%) and cost-effective travel (29.5%).

For your most recent outbound trip, what motivated your destination choice?

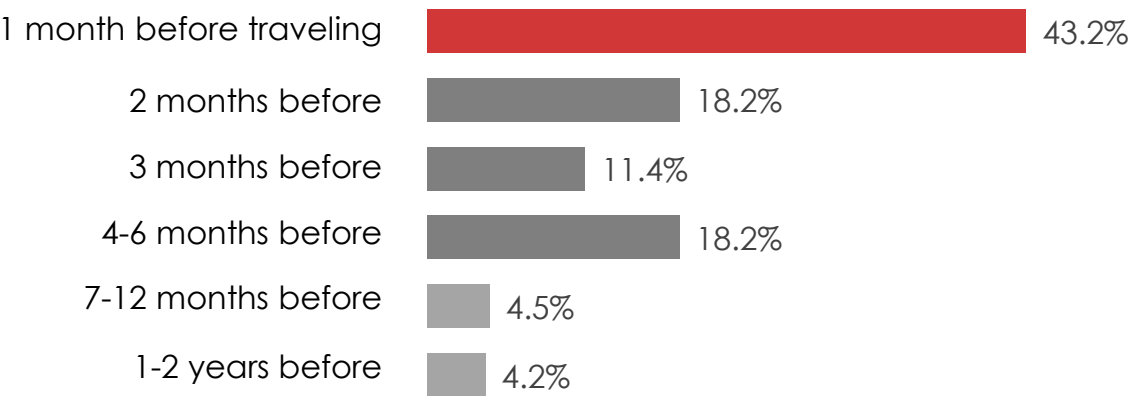
N=44



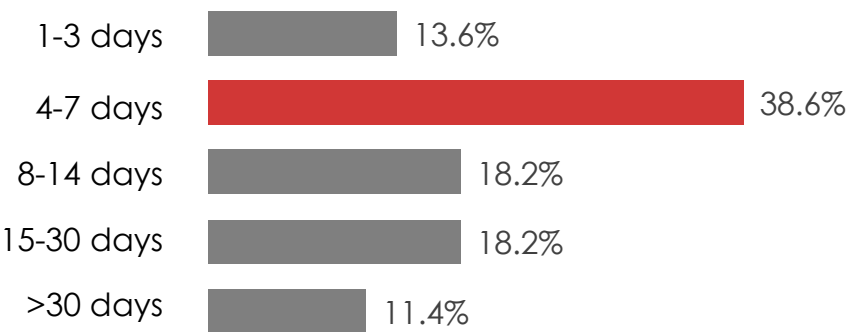
Chinese outbound travelers in 2023 tend to plan one month in advance, with trips averaging 4-7 days

The small number of survey respondents who had traveled abroad already in 2023 usually planned their trips just one month or less before traveling (43.2%), with trips averaging 4-7 days (38.6%).

How far in advance did you start planning your most recent 2023 outbound trip? N=44



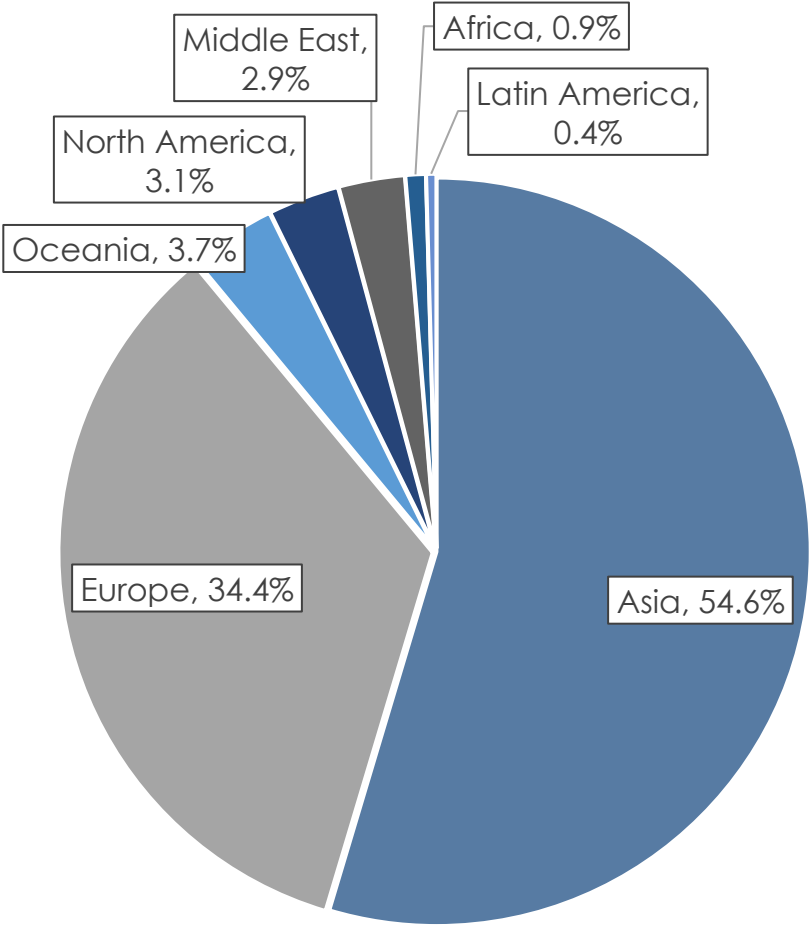
How long did your outbound trip last? N=44



Europe stands out as the most coveted long-haul destination for Chinese tourists in 2023

We asked survey respondents who either had future 2023 trips booked or who said they hoped to travel outbound this year, where they intended to go. 54.6% said they planned to stay within Asia, followed by 34.4% who wanted to visit Europe – by far the most popular long-haul destination. Oceania, North America, and the Middle East followed at 3.7%, 3.1%, and 2.9%, respectively. Africa and Latin America were niche choices for 2023 trips, with each chosen by less than 1% of respondents.











Which region outside mainland China do you plan to visit in 2023?
N=454



Northeast Asian countries top the list for 2023 travel, while Iceland emerges as a dark horse

Compared to Dragon Trail’s April 2023 Chinese Traveler Sentiment Report, South Korea has gained significantly in popularity. It moved up from 5th place to 1st on the list of travel destinations for 2023, chosen by 10.4% of respondents in August 2023, compared to 4.4% in April. Just before this survey was concluded, South Korea rejoined the list of countries to which Chinese travel agencies can sell group tours, for the first time since 2017. In 5th place, Iceland has never featured on top destination lists in previous Dragon Trail surveys, but it’s enjoying sudden popularity in 2023 thanks to viral photos and videos on Chinese social media of active volcanos.

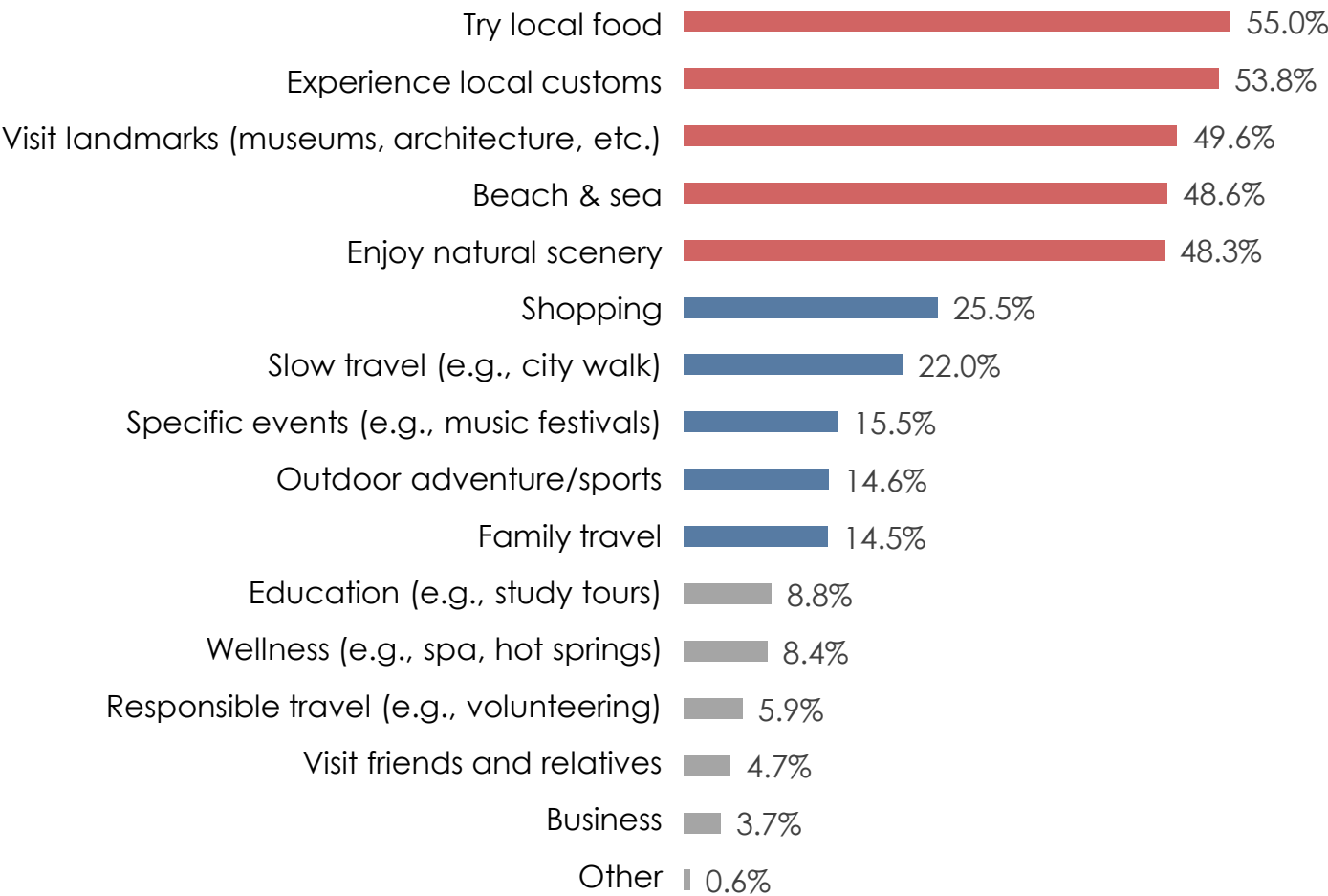
Which outbound destination do you plan to visit in 2023? N=454

Destination		Repeat vs. 1st Time
#1	 South Korea (10.4%)	6% vs. 94%
#2*	 Japan (10.1%)	15% vs. 85%
#3	 Thailand (6.4%)	17% vs. 83%
#4	 Hong Kong (6.2%)	25% vs. 75%
#5	 Iceland (5.3%)	0% vs. 100%
#6	 Macau (4.8%)	18% vs. 82%
#7	 Maldives (4.2%)	11% vs. 89%
= #8	 France (4.0%)	11% vs. 89%
= #8	 Singapore (4.0%)	17% vs. 83%
#10	 UK (3.1%)	7% vs. 93%

Local experiences, landmarks, and natural scenery continue to drive outbound travel

Responses to our question about outbound trip purpose have remained remarkably consistent over the past several years, with trying local food and experiencing local culture at the top of the list, followed by visiting landmarks such as museums, and enjoying natural scenery including beaches and mountains. While the pandemic certainly increased attention towards personal health, wellness travel remains niche for outbound trips.

What is the purpose of your next outbound trip? N=999

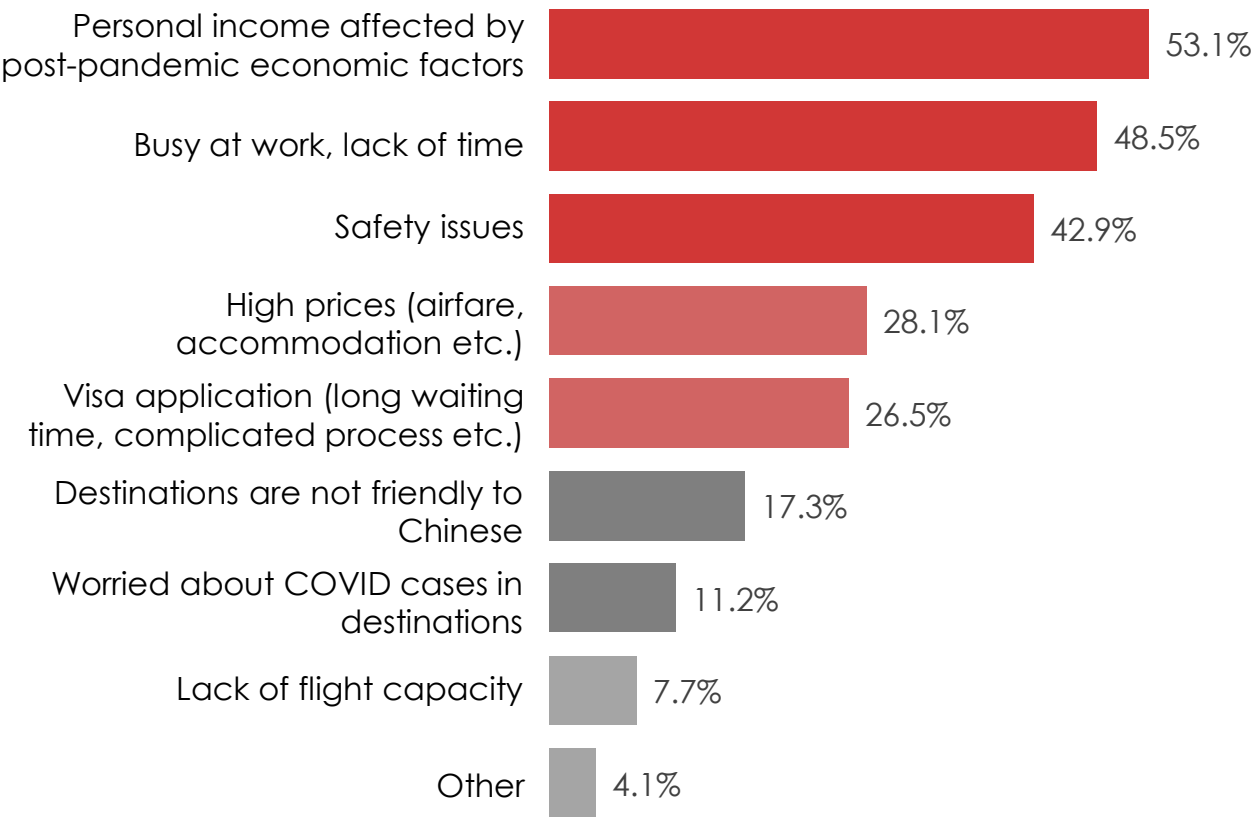


Risk of COVID infection is no longer a top factor dissuading Chinese outbound travel

The most significant change in reasons for not traveling outside of mainland China that we've observed this year is the drop in worries about COVID-19. In January 2023, the potential impacts of COVID infection on travelers and their families were the biggest reasons after salary constraints for staying at home, chosen by 52-54.2%. Eight months later, COVID has dropped to the bottom of the list, chosen by only 11.2% of respondents. At the same time, limited personal income has remained the biggest reason for not traveling, while lack of time and safety issues also top the list.

What are your reasons for not planning to travel abroad in 2023?

N=196

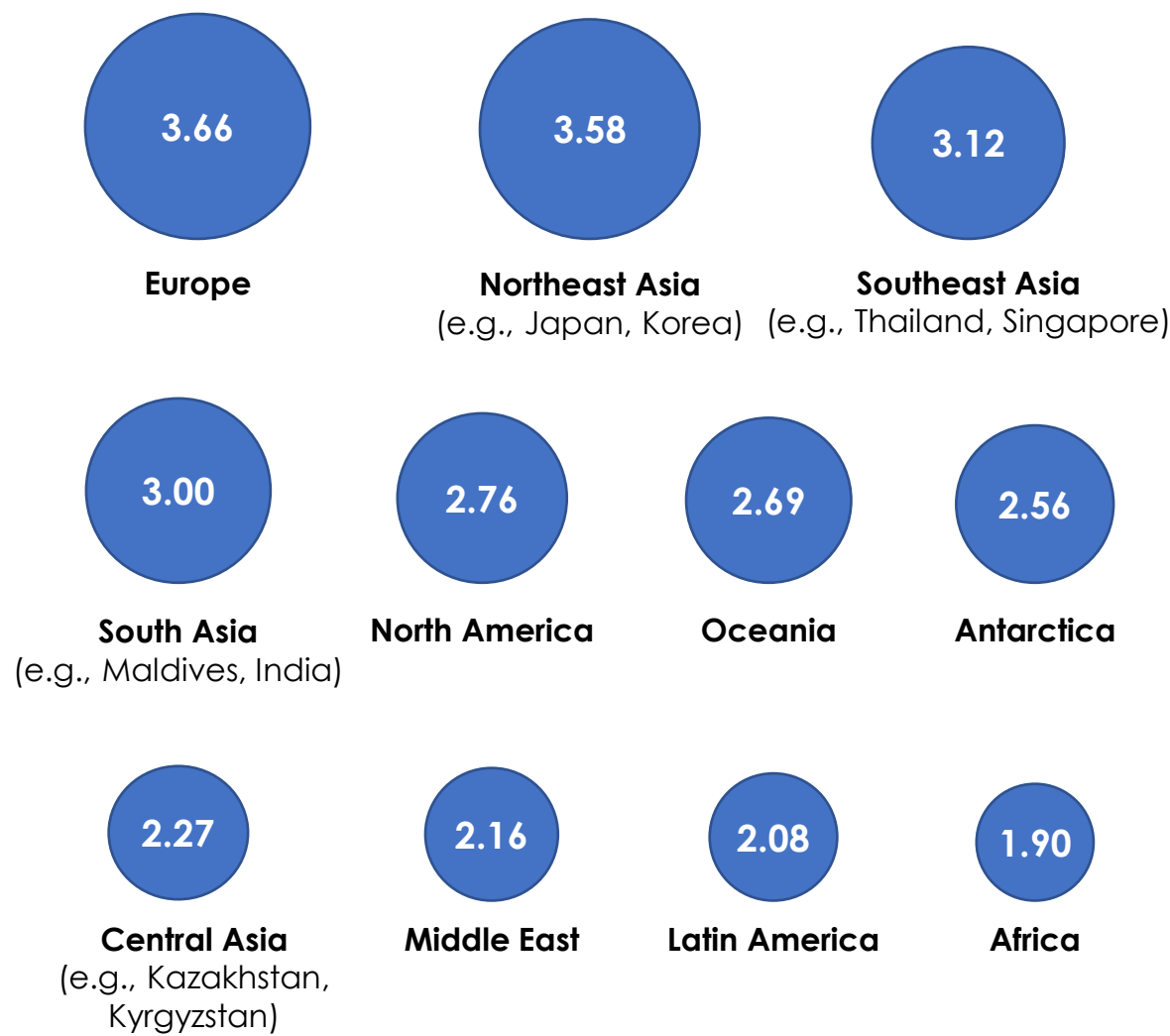


Europe and Northeast Asia are the regions Chinese travelers are most interested to visit

We asked survey respondents to rank world regions on a scale of 0 to 5, with 5 being “extremely interested” in visiting and 0 “not likely at all”. Europe received the top score, with Northeast Asia following closely. Interest in Southeast Asia – ever popular with Chinese tourists – and South Asia was also comparatively high.

How interested are you in traveling to these areas of the world?

N=999



Regional spotlight: In Africa, Egypt stands out, while nature and wildlife add to the appeal

We asked survey respondents who said they were interested in Africa to elaborate on what they would most like to see when traveling to this continent. The pyramids and Egypt stand out as the top attraction and destination for Chinese tourists. They also have great interest in nature and wildlife. The African savannah, Great Rift Valley, Great Migration, deserts, wildlife, forests, and other natural attractions were frequently mentioned. Apart from Egypt, the other two countries mentioned were South Africa and Kenya. Chinese travelers are also interested in local culture and experiences in Africa, such as tribes and gastronomy.

What destinations/attractions/activities
in Africa are you interested in?
N=249



Regional spotlight: Dubai is the top Middle Eastern destination for Chinese tourists

For Chinese travelers interested in visiting the Middle East, Dubai is by far and away the most popular destination that comes to mind. Next, survey respondents also listed Egypt and the pyramids. It is noteworthy that Egypt is regarded as an important destination in two regions – both the Middle East and Africa.

Other top countries and cities in the Middle East include Qatar, Jerusalem, United Arab Emirates, Saudi Arabia, and Turkey. Meanwhile, travelers are also interested in natural scenery, such as the desert and the Dead Sea, and landmark architecture such as Burj Al Arab and the Burj Al Khalifa.

What destinations/attractions/activities in the Middle East are you interested in? N=367



Regional spotlight: When it comes to Europe, Chinese travelers have Paris in mind

In Europe, the top three countries mentioned by Chinese travelers are France, Italy and the UK. Among them, France attracts the most attention. Chinese travelers are interested in Paris and the Eiffel Tower, the Louvre Museum and Notre-Dame. But while Paris stands out as a focus point, survey respondents showed interest in diverse array of European countries, including Germany, Switzerland, Norway, Iceland, Greece, and Spain. Cities mentioned included Rome, London, Venice, and Berlin, and attractions encompassed both traditional architecture and natural beauty.

What destinations/attractions/activities in Europe are you interested in?

N=844



Regional spotlight: In Oceania, tourism centers on the sea, with Australia the top destination

For Oceania, Australia and New Zealand are the top two countries Chinese travelers want to visit, followed by Fiji. Australia's appeal for Chinese tourists is particularly apparent, with Sydney, the Sydney Opera House, and kangaroos all frequently mentioned. The ocean is also a major draw in this part of the world, with survey respondents attracted to the Great Barrier Reef, Gold Coast, diving, islands, coral reefs, and seaside.

What destinations/attractions/activities in Oceania are you interested in?

N=547



Regional spotlight: North America is a destination for national parks and modern cities

The United States is the primary destination Chinese tourists are interested in visiting in North America, followed by Canada. Among more specific destinations and attractions mentioned, only one – the shared destination of Niagara Falls – is in Canada. In the United States, New York, Hawaii, California, and Florida stand out as the states mentioned explicitly or by their cities and attractions.

Chinese tourists to North America are interested both in nature and cities. They are especially interested in visiting national parks such as Yellowstone and the Grand Canyon. Meanwhile, they also want to visit modern cities such as San Francisco and city-related tourist attractions like Hollywood.

What destinations/attractions/activities in North America are you interested in? N=567



Regional spotlight: Natural scenic spots and local culture attract tourists to Latin America

Brazil, Mexico, Argentina, and Peru are the four most popular countries in Latin America among Chinese tourists. Iguazu Falls, Salar de Uyuni and the Amazon Rainforest are the most frequently mentioned tourist attractions, which are all natural scenic spots. Survey respondents are also interested in unique local cultural experiences such as visiting ancient ruins, experiencing football/soccer culture, and trying local cuisine.

What destinations/attractions/activities in Latin America are you interested in?

N=328

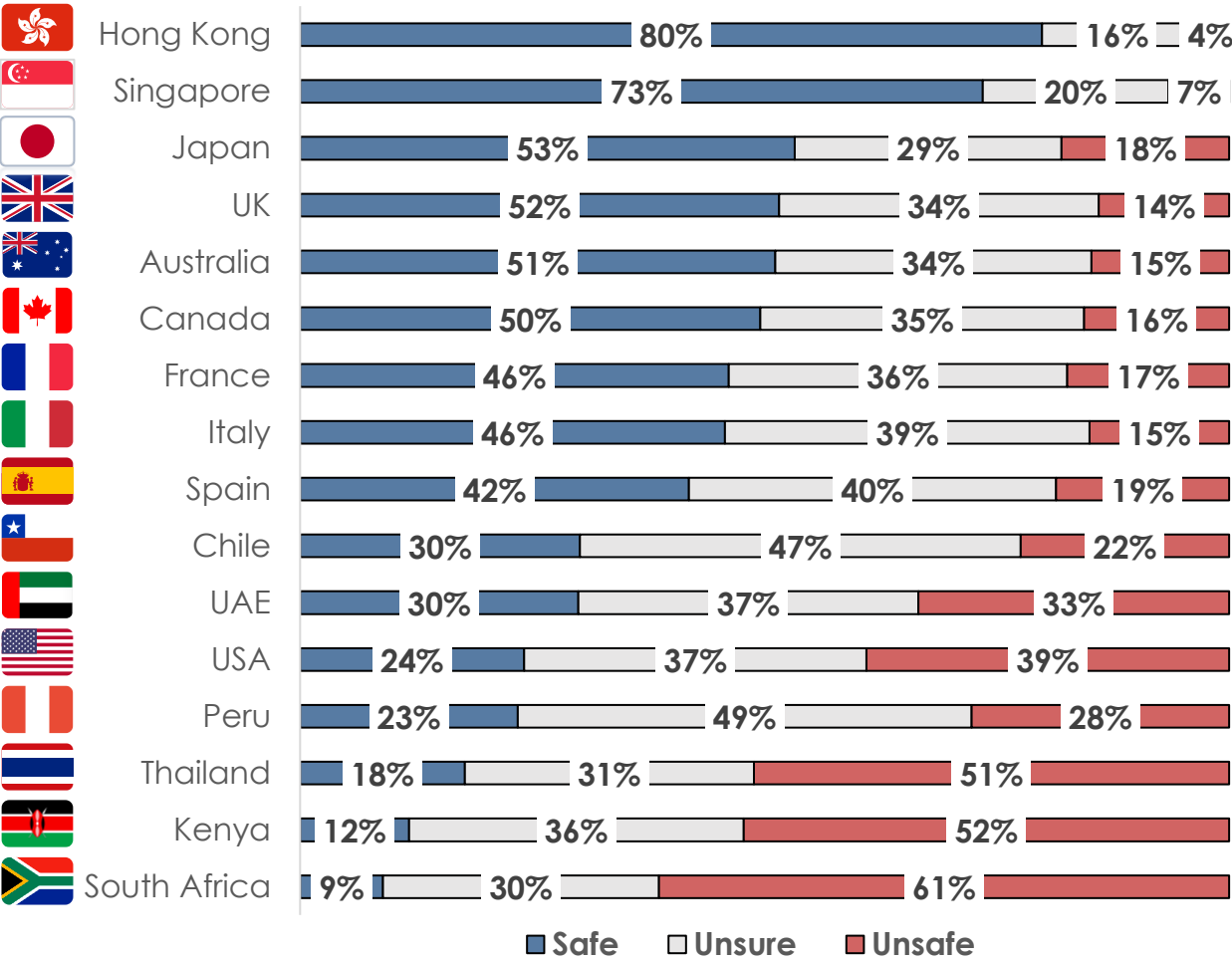


Safety perceptions have radically improved for nearly all destinations since 2022

Overall, there has been a significant increase in the perceived safety of all 13 destinations included in our 2021-2022 surveys. This goes for destinations at both ends of the spectrum. Always identified as one of the safest destinations, Singapore went from a 38% “safe” ranking in November 2022 to 73% “safe” in August 2023. Meanwhile, only 39% of respondents see the US as “unsafe” now, compared to 67% in November 2022, and 87% in September 2021.

Respondents' perception of safety in France does not seem to have been affected by the riots in 2023, in which a Chinese tour bus was attacked, and the perceived safety of European countries is generally good. On the other hand, stories of robberies and human trafficking in Southeast Asia are impacting the safety perception of Thailand, the only country on our list to be seen as more “unsafe” (51%) now than in November 2022 (28%).

How safe is it to travel to the following destinations?

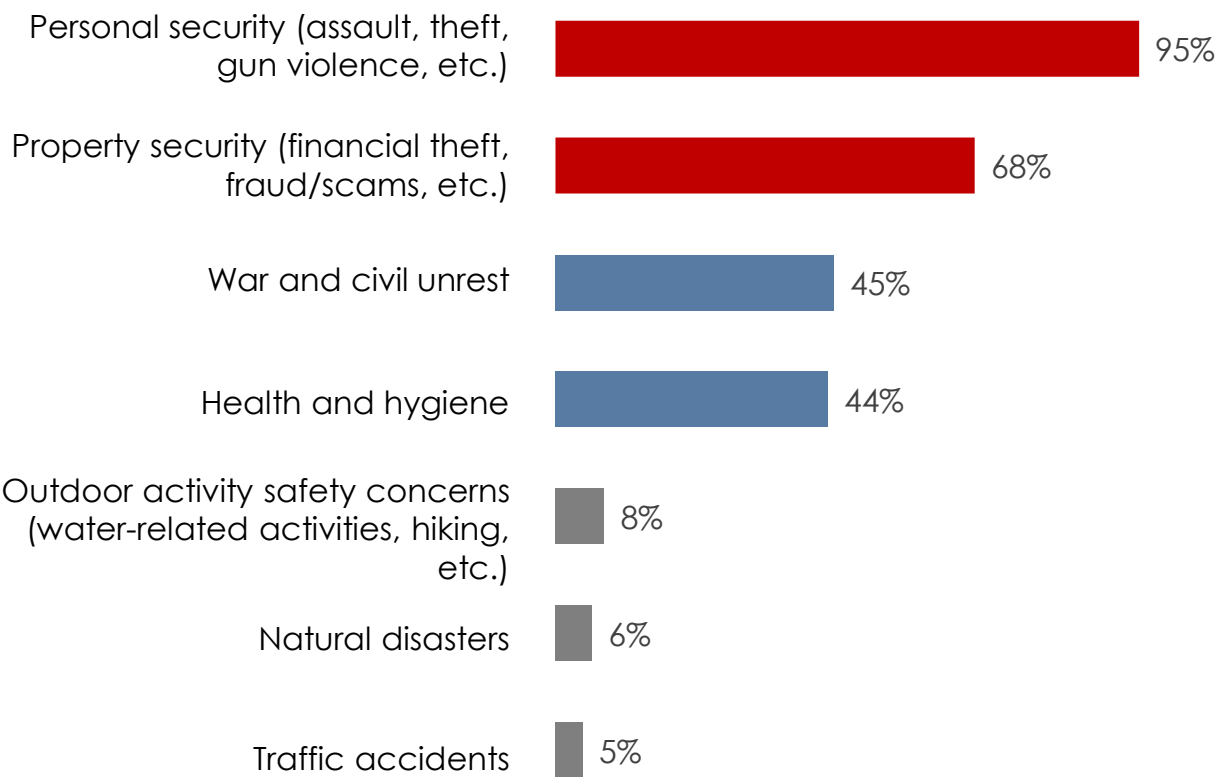


Personal security is by far the most pressing safety concern for Chinese tourists

Safety issues have always been a concern for Chinese tourists, but what exactly does “safety” mean for an outbound trip? We asked respondents to define their top concerns.

Almost all respondents (95%) selected concerns about local security, which destination countries need to pay special attention to. In addition, property security, war and civil unrest, and health and hygiene are also key safety concerns for tourists.

What are the safety concerns that worry you the most when traveling abroad?



Chinese tourists join group tours and purchase travel insurance to alleviate safety concerns, while looking to embassies for added protection

Chinese travelers listed personal actions they could take to alleviate safety concerns, with joining group tours one proactive solution, as well as purchasing travel insurance. Some also mentioned having a bodyguard or security. Regarding external support, travelers said they wanted Chinese embassy protection and good local public security measures.

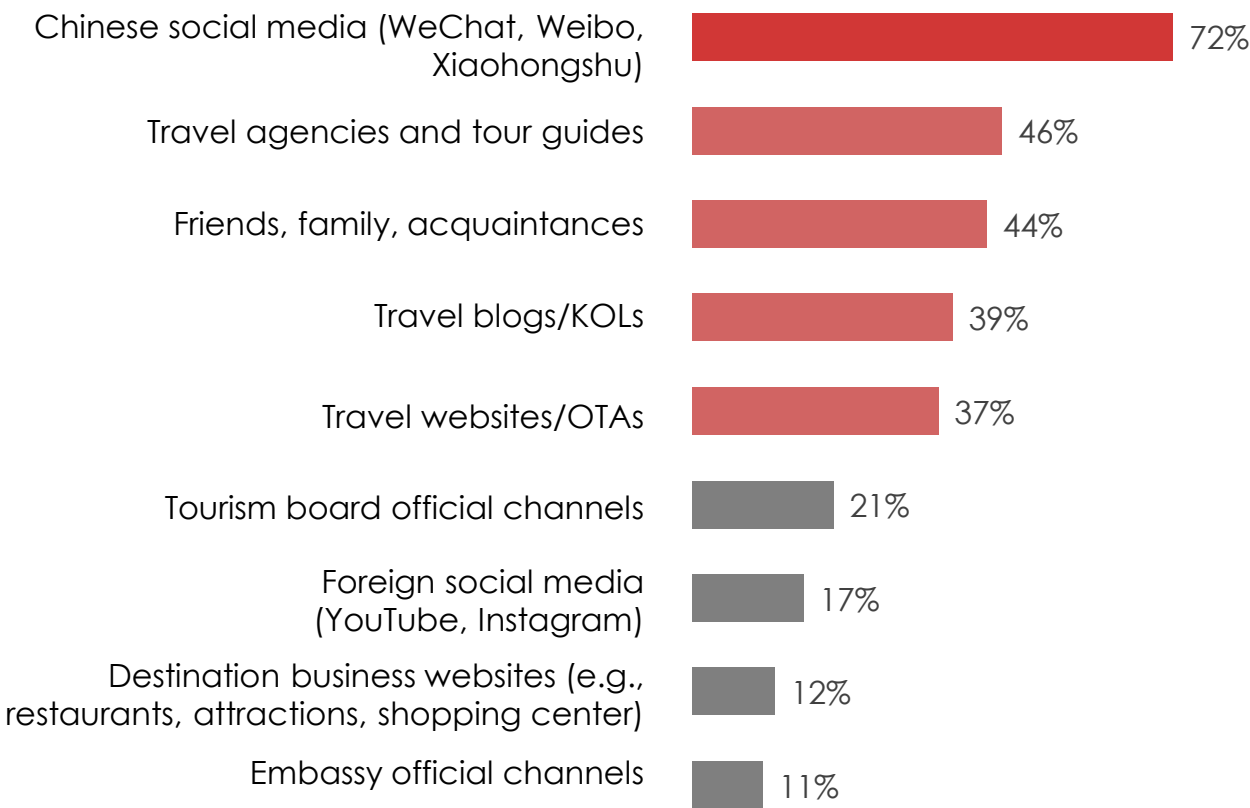
Chinese travelers: Which measures would alleviate concerns about safety issues abroad?



Chinese social media remain the most important sources of destination information, followed by trusted contacts

Chinese social media platforms such as WeChat, Weibo, and Xiaohongshu are the most commonly used channels for Chinese tourists to find information about travel destinations, used by 72% of survey respondents. Next are travel agencies and tour guides (46%), indicating that traditional travel agency channels are still important in 2023. Close behind are friends, family, and acquaintances (44%) – another trusted word-of-mouth source. Travel blogs/KOLs (39%) and travel websites/OTAs (37%) also continue to rank relatively high, as they have in previous surveys.

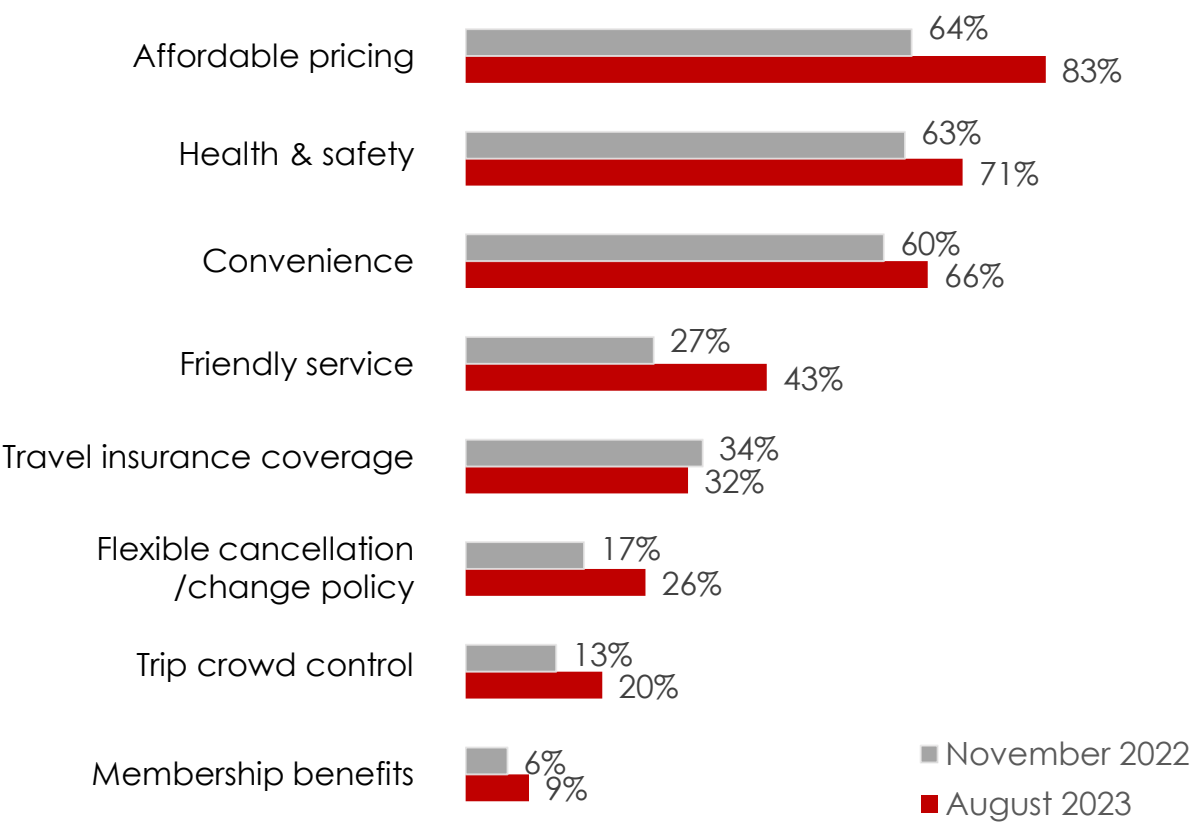
Chinese travelers: Channels used for destination information



Pricing, safety, and convenience remain key product preferences, while service has become more important

When it comes to travel products, pricing, safety and convenience are still the top three factors for Chinese travelers. Since our survey last November, we've seen a significant increase in respondents who are concerned about whether the travel product provides friendly service, indicating growing consumer expectations and demands in 2023.

Product preferences for Chinese travelers

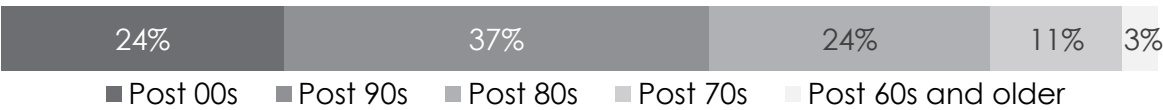


Methodology

From 4-11 August 2023, Dragon Trail Research conducted a 39-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 999 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



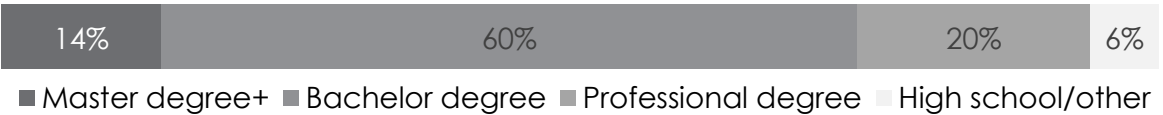
Gender



City of residence



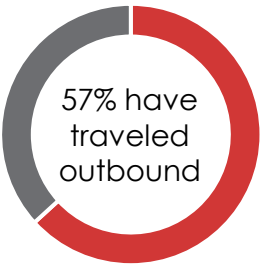
Education



Monthly salary (RMB)

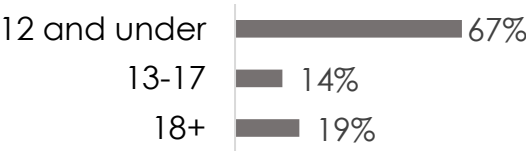


Family



All survey respondents had interest in outbound travel. 57% had previously traveled outbound.

Age of Children





Dragon Trail
INTERNATIONAL



Copyright @ Dragon Trail Research



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

To discuss cooperation and partnerships, contact:

info@dragontrail.com

www.dragontrail.com/resources

Dragon Trail Research | Dragon Trail International

