

A woman with long dark hair, wearing a white t-shirt, stands in a vast, arid desert landscape. She is holding a large, unfolded map in front of her face, completely obscuring it. The map shows a complex network of roads and geographical features. The background features a long, straight road that stretches into the distance under a bright, hazy sky with scattered clouds. The overall color palette is warm and golden, suggesting a sunrise or sunset.

The Mind of the Chinese Traveller

FUTURE
Research-
based
foresight

STRATEGY
Future-
based
strategy

ACTION
Strategy
enforcement



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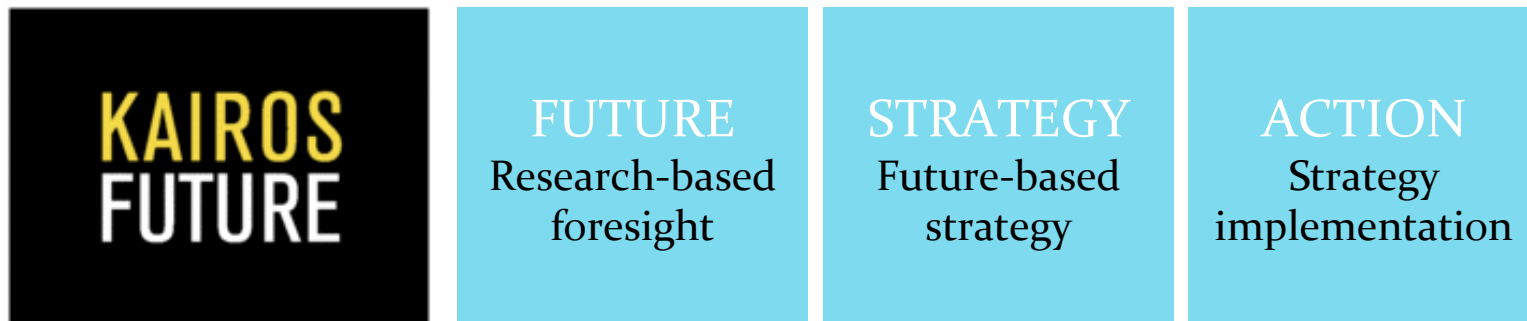
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We assist organizations and leaders in understanding and shaping their futures



Kairos (καιρός)
is an ancient Greek word meaning
"the right time" or "time for change"

Two reports

- **The Chinese Outbound Travel Market** (update)
 - Plus: Update of Market Insight – China
- **NEW: The Mind of the Chinese Traveller** (social media analysis)

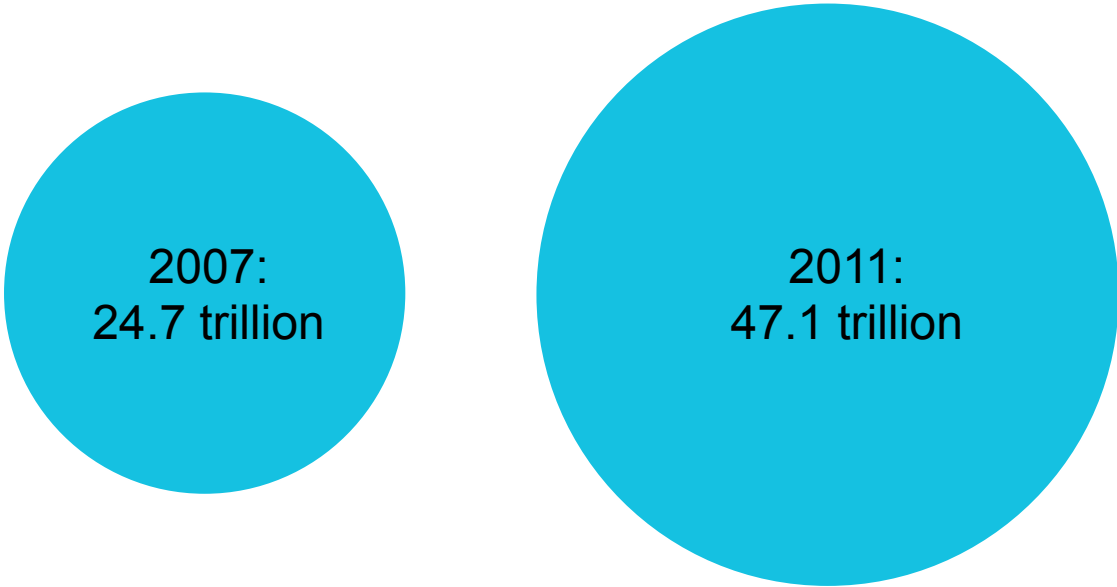


The Chinese Outbound Travel Market

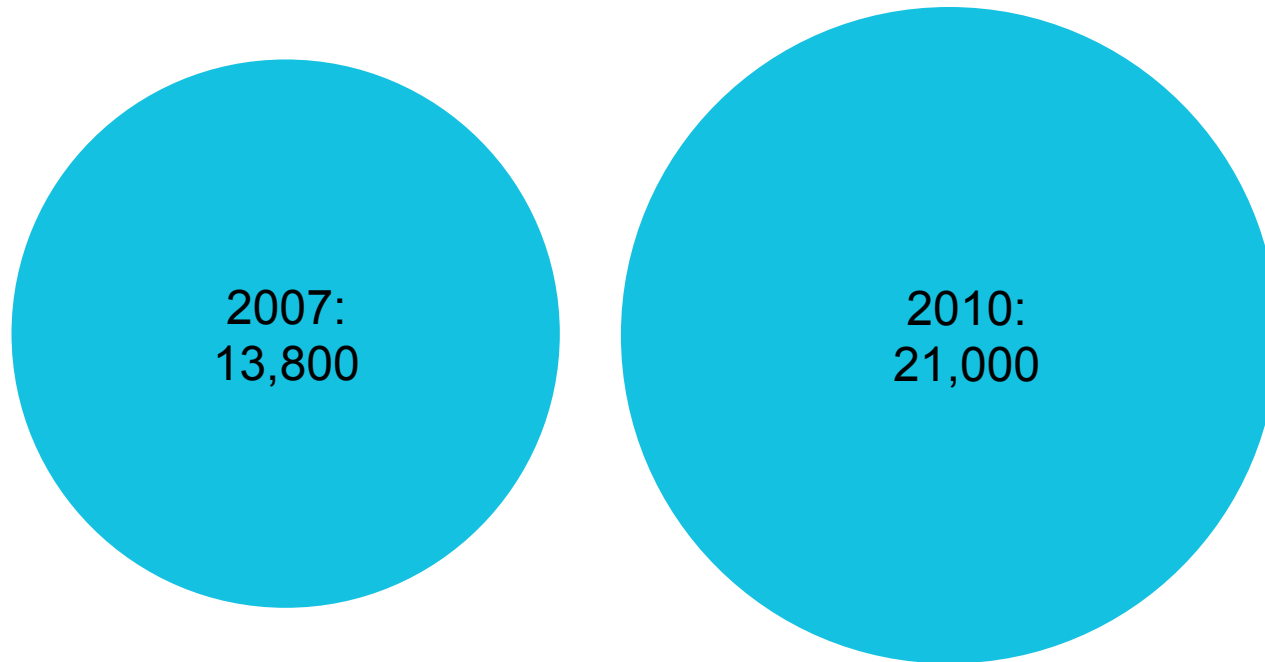
Consultants for Strategic Futures.



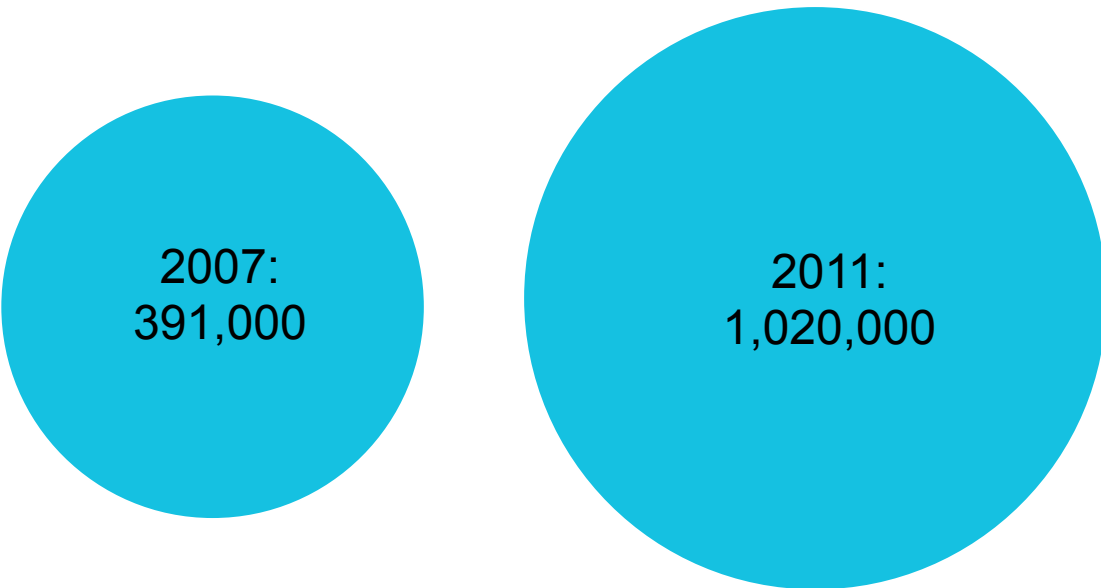
China's GDP (RMB)



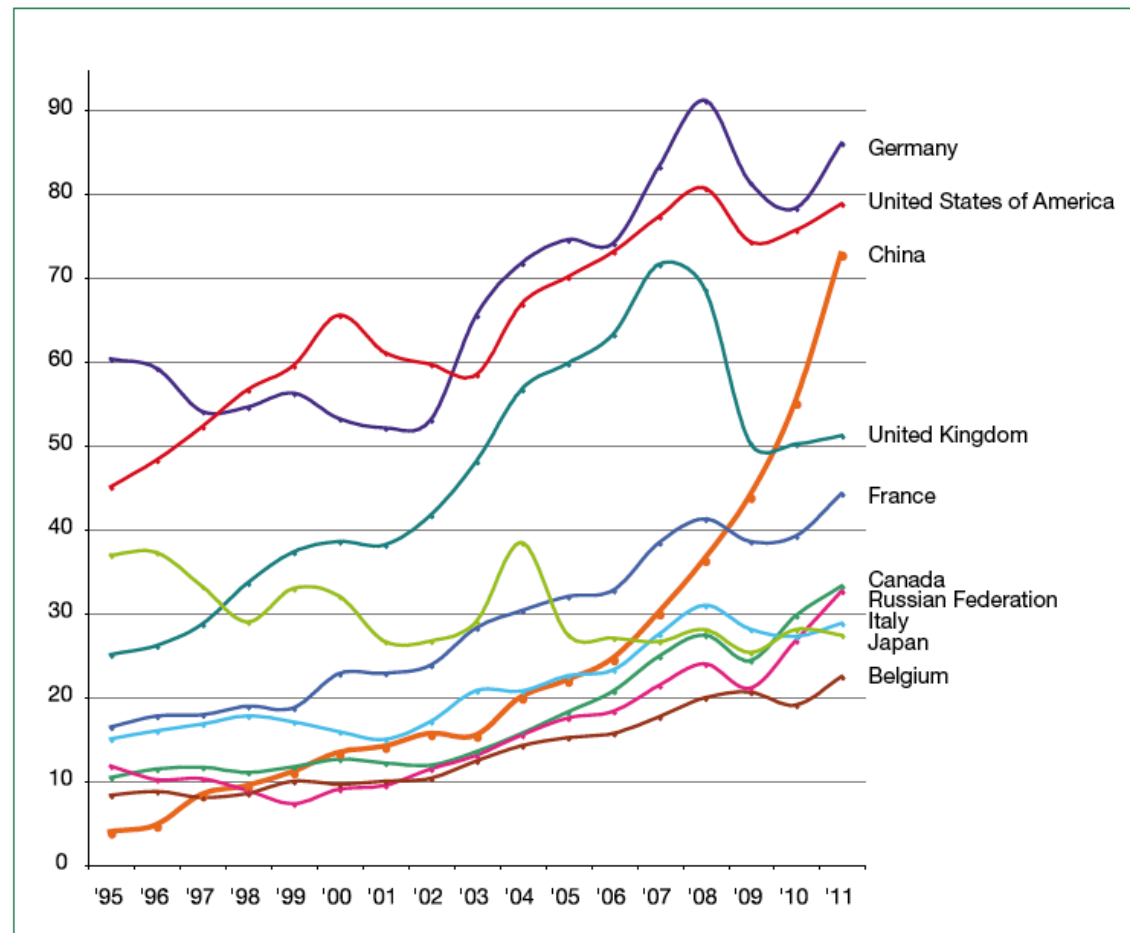
Urban per capita income (RMB)



Number of dollar millionaire households



International tourism expenditure (US\$ bn)



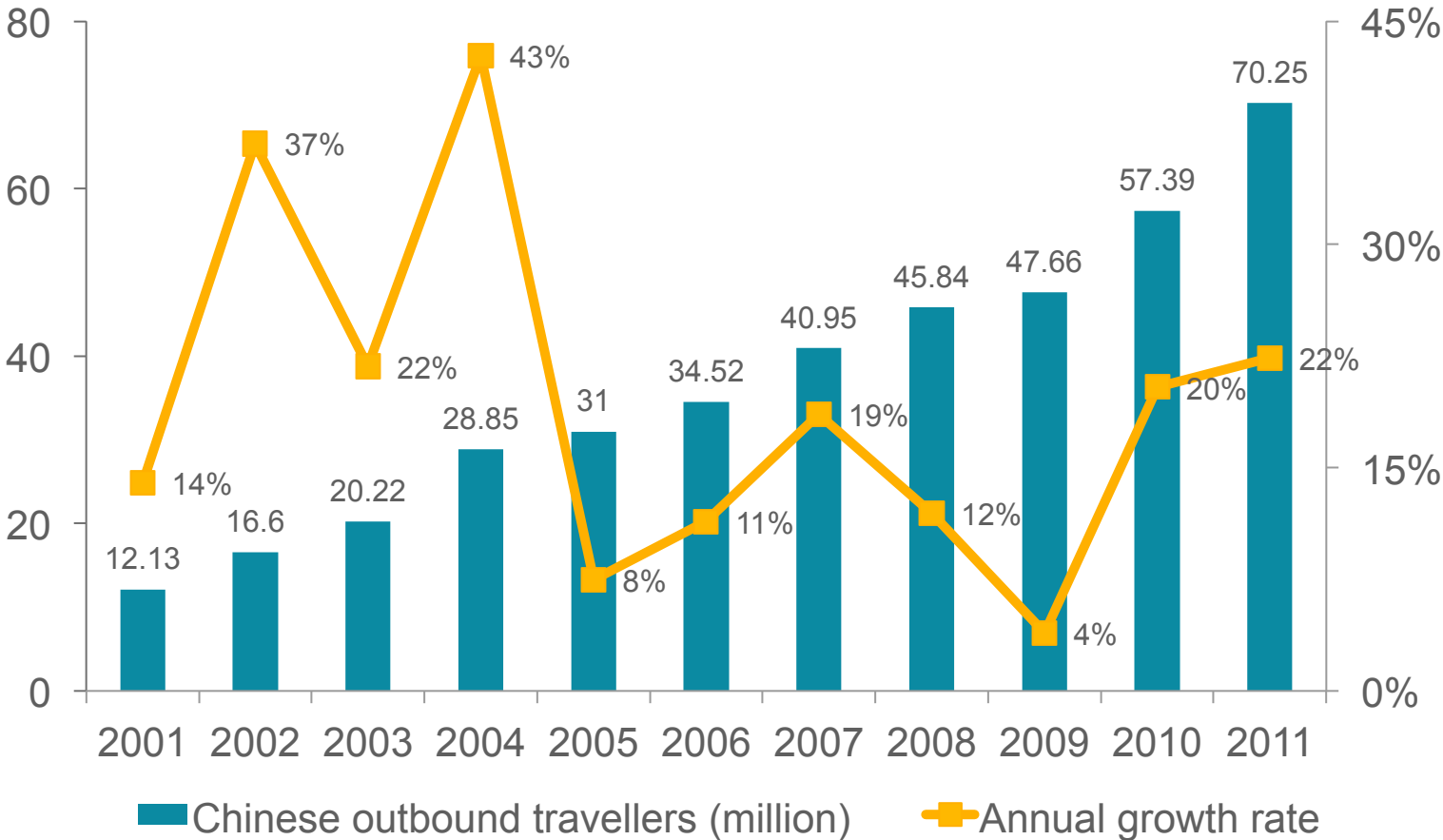
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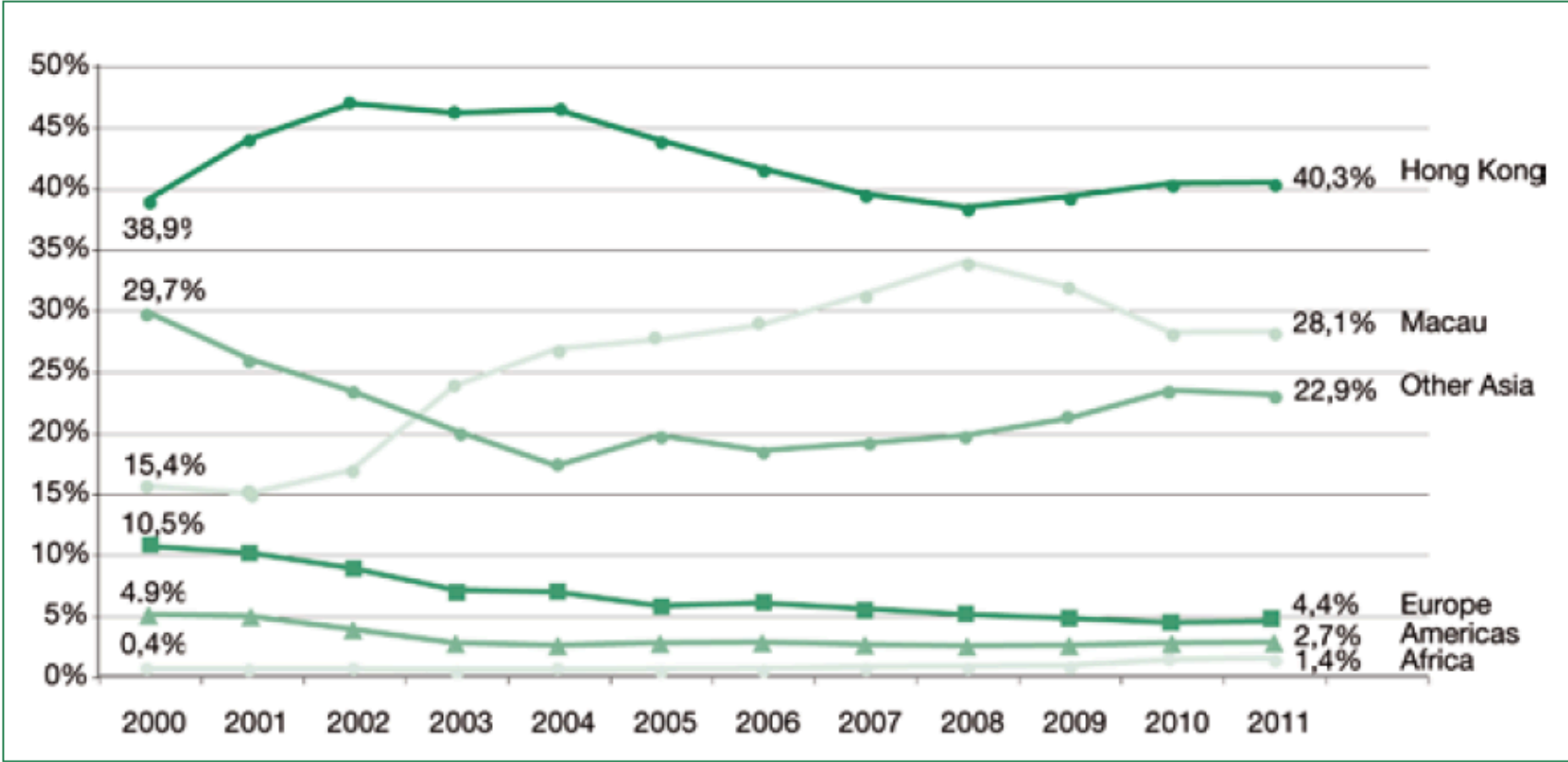
Source: UNWTO



Number of Chinese outbound trips



Share of world regions in Chinese outbound travel



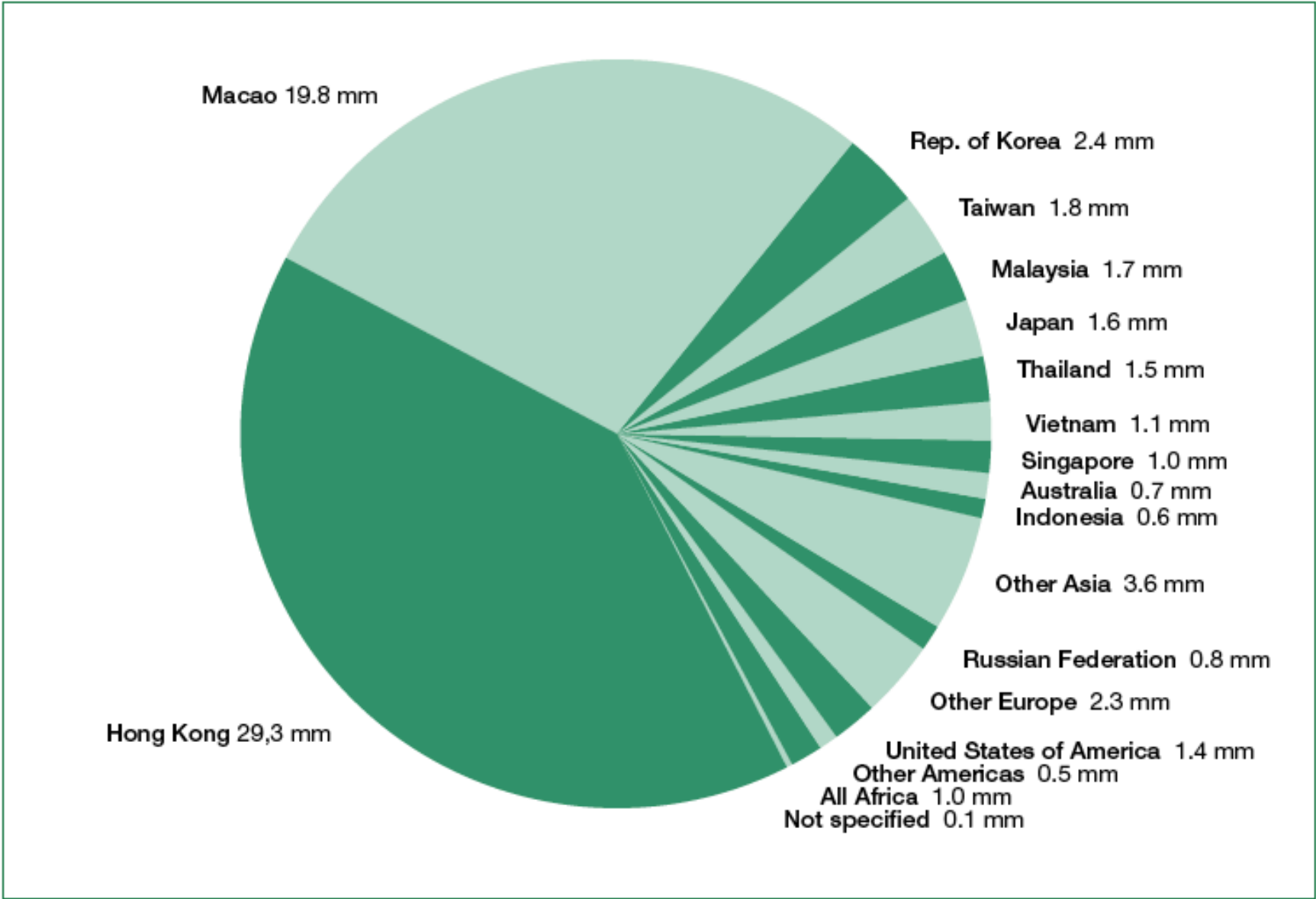
Source: World Tourism Organization (2012), based on national sources.

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Source: UNWTO

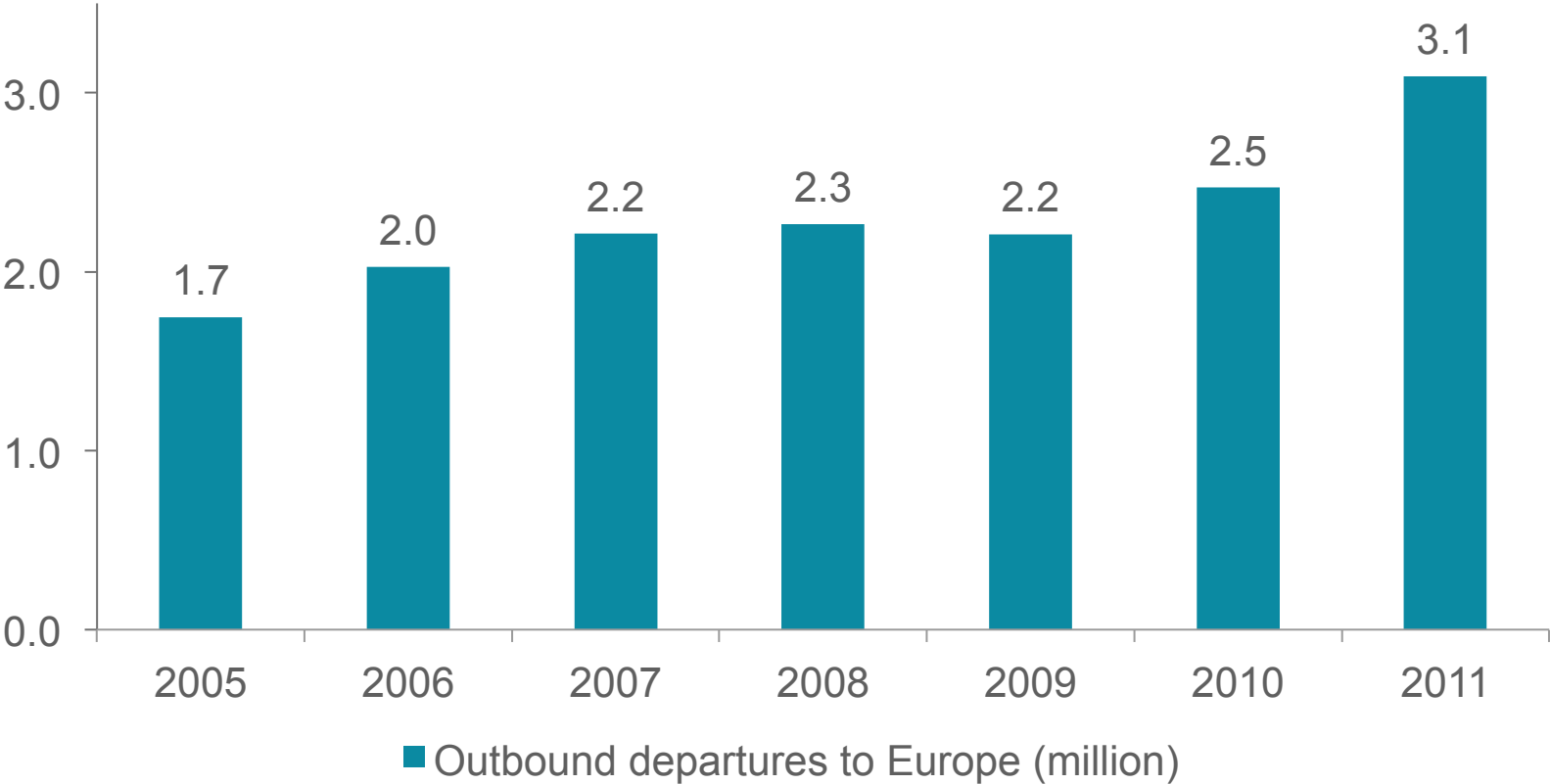




Source: World Tourism Organization (2012), based on national sources.



Chinese trips to Europe



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Source: UNWTO

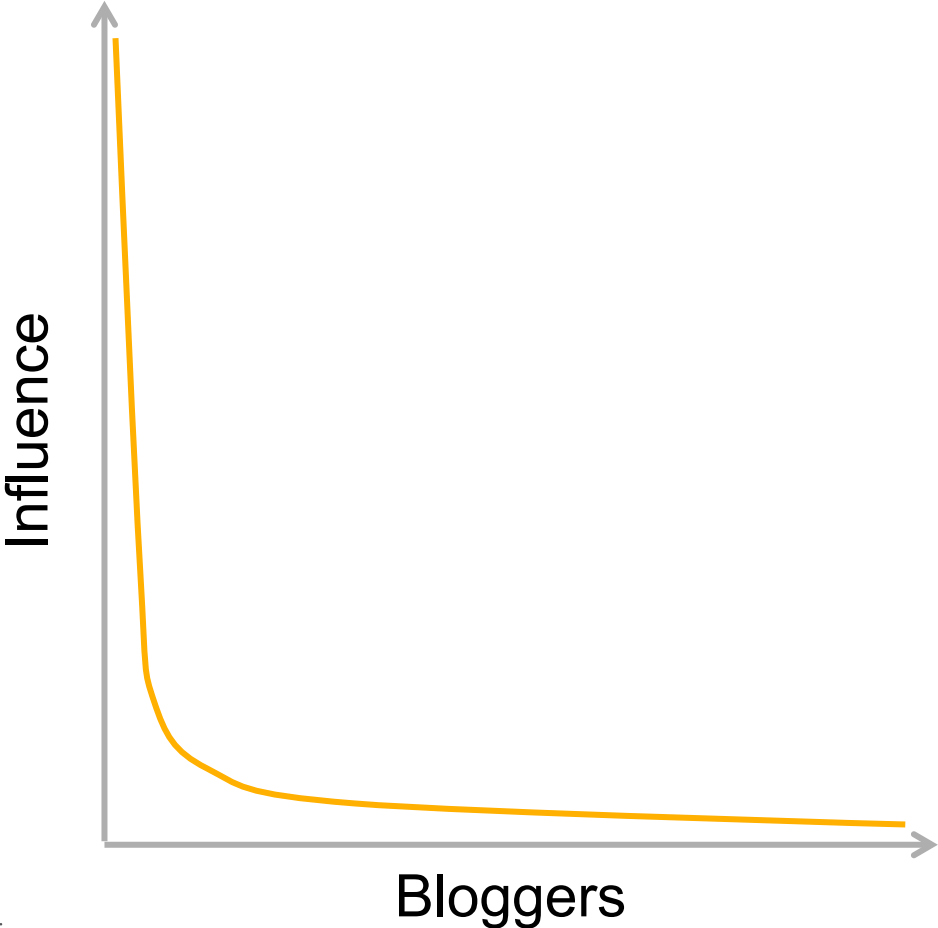


Netnographic study

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The long tail of bloggers



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70 million stories

Qualitative netnography

- In-depth reading of individual blogs, microblogs, forum posts, and other online content
- Analysis of over 1,000 photographs taken by travellers and shared online
- A qualitative analysis of travel types, motivations, and behaviour

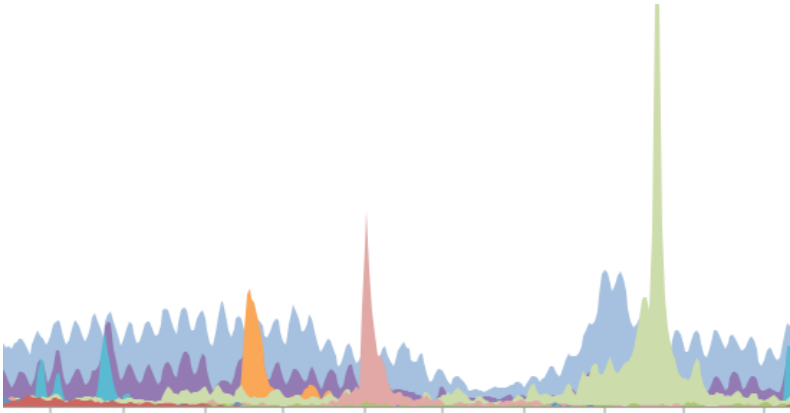
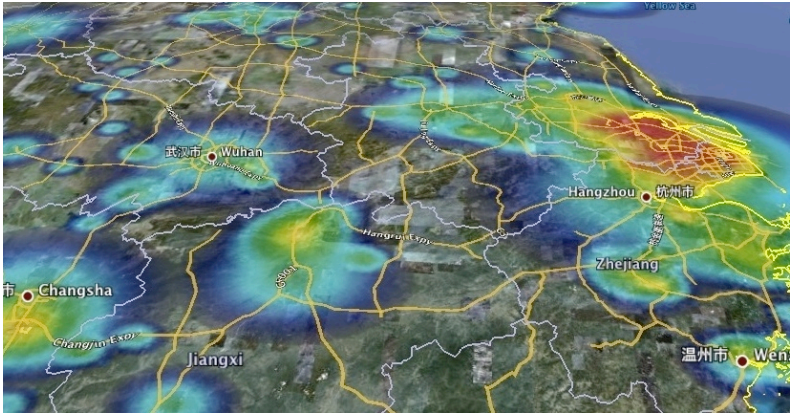
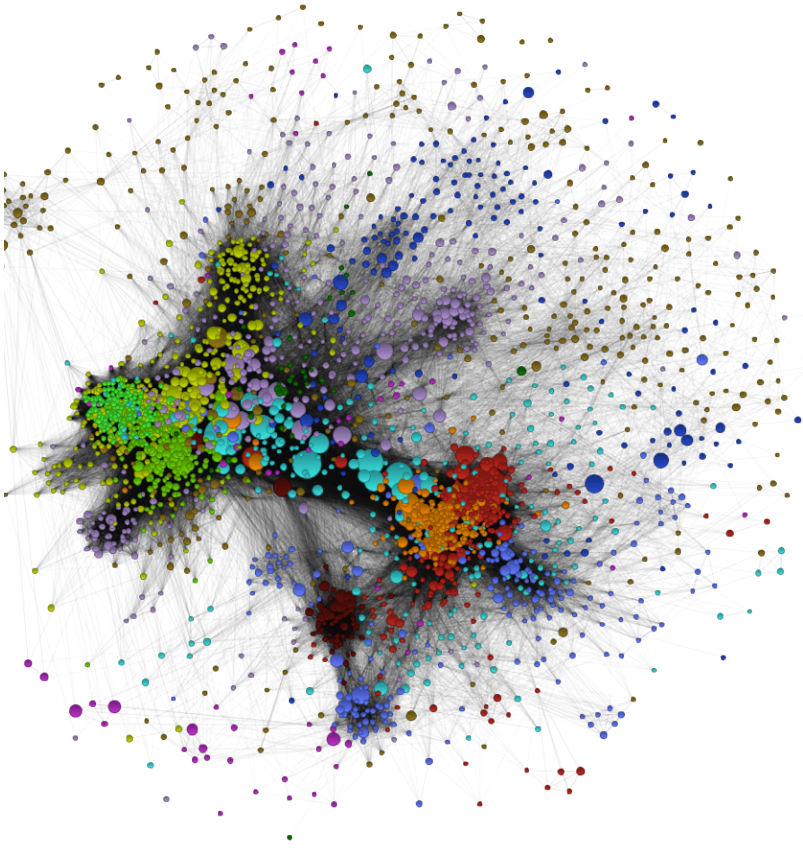


Quantitative text analysis

- Over 50 million microblog posts
- Over 20 million blogposts
- Search statistics from Internet search engines Baidu and Google
- Clustering of bloggers into travel groups and extraction of themes and trends related to travel and Europe



Finding the signal in the noise



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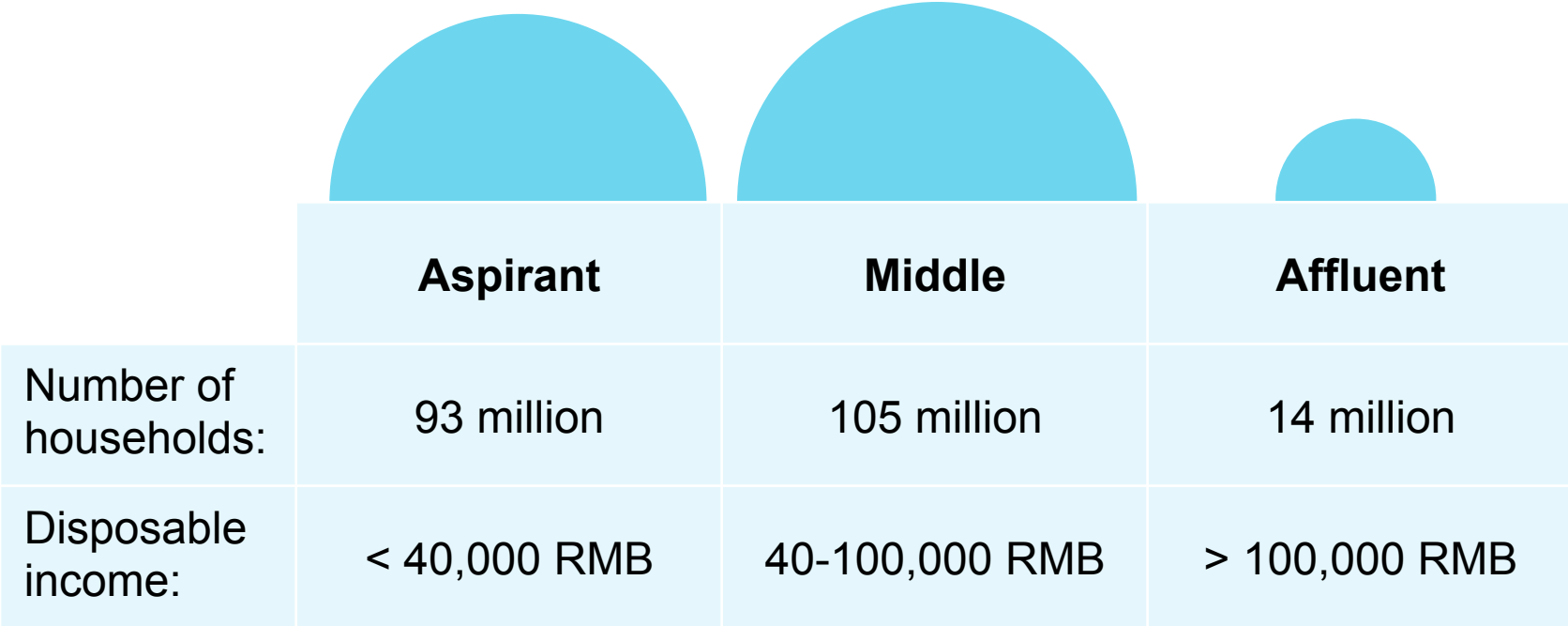


The netizens

- 538 million Internet users
- 96% of Chinese with higher educational degree
- 70.3% of people in Beijing – 11.9% of those in Guizhou
- 3 times as active in social media as American Internet users



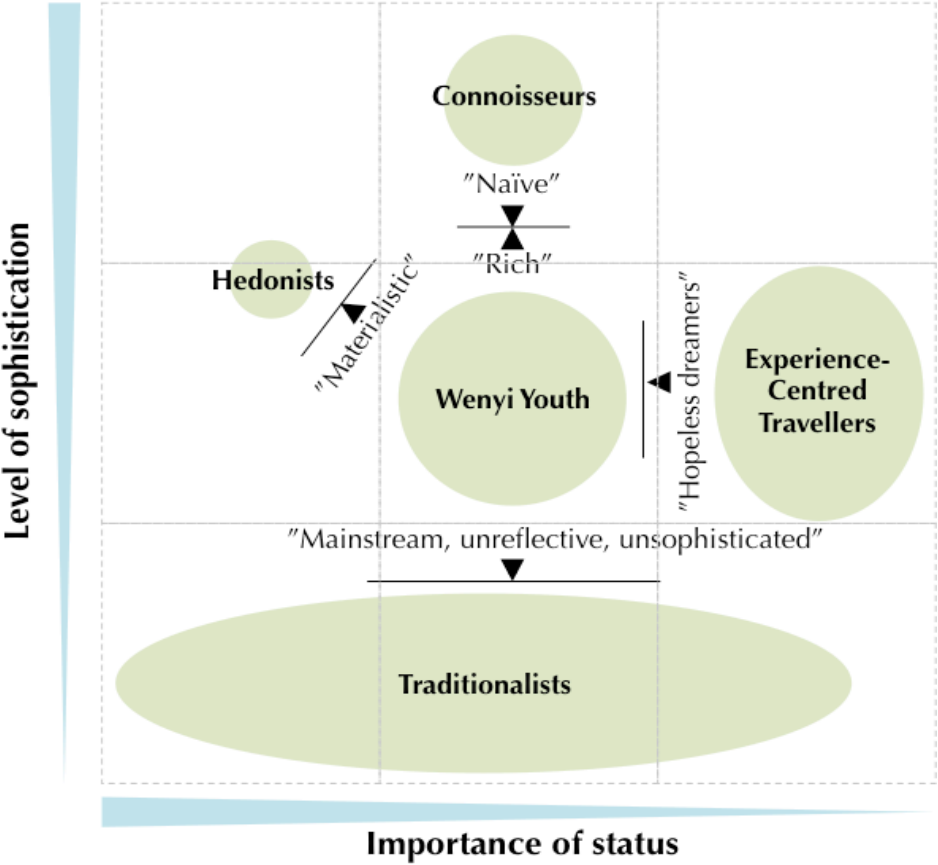
Traditional segmentation of urban Chinese households



Source: Boston Consulting Group



Five major travel tribes



Themes

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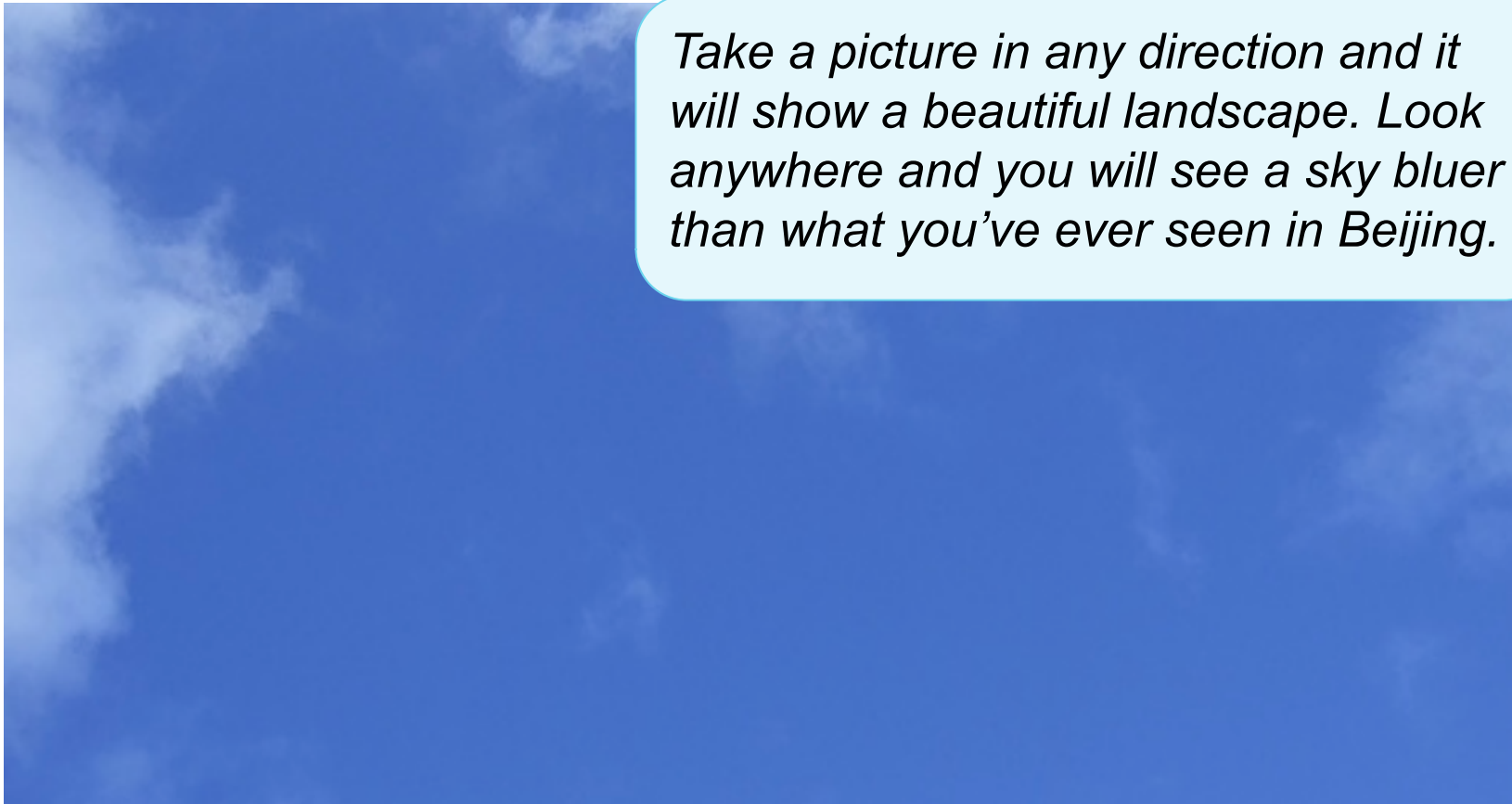


Major themes

- Yearning for simplicity and authenticity
- Increasing demand for in-depth travel
- Shopping and luxury
- Remaining price sensitivity
- High potential in lower-tier cities
- Honeymoon boom
- Travel goes mobile
- Fringe phenomena spreading to the mainstream
- The visa hurdle
- A complex information landscape
- Time – a major concern



Blue skies – an underestimated advantage



Take a picture in any direction and it will show a beautiful landscape. Look anywhere and you will see a sky bluer than what you've ever seen in Beijing.



Honeymoon travel



The tenth wedding anniversary is a very special day, so I asked my wife where she would like to go for a make-up honeymoon.

I and my beloved wife travelled to amazing Greece. We experienced the sweetness and romance of the myriad Greek islands, embraced the serendipitous blue sky at the Aegean Sea, kissed in front of temple ruins, and felt the warm breeze on a passionate boat trip. We will forever live happily together.



Wedding photo travel

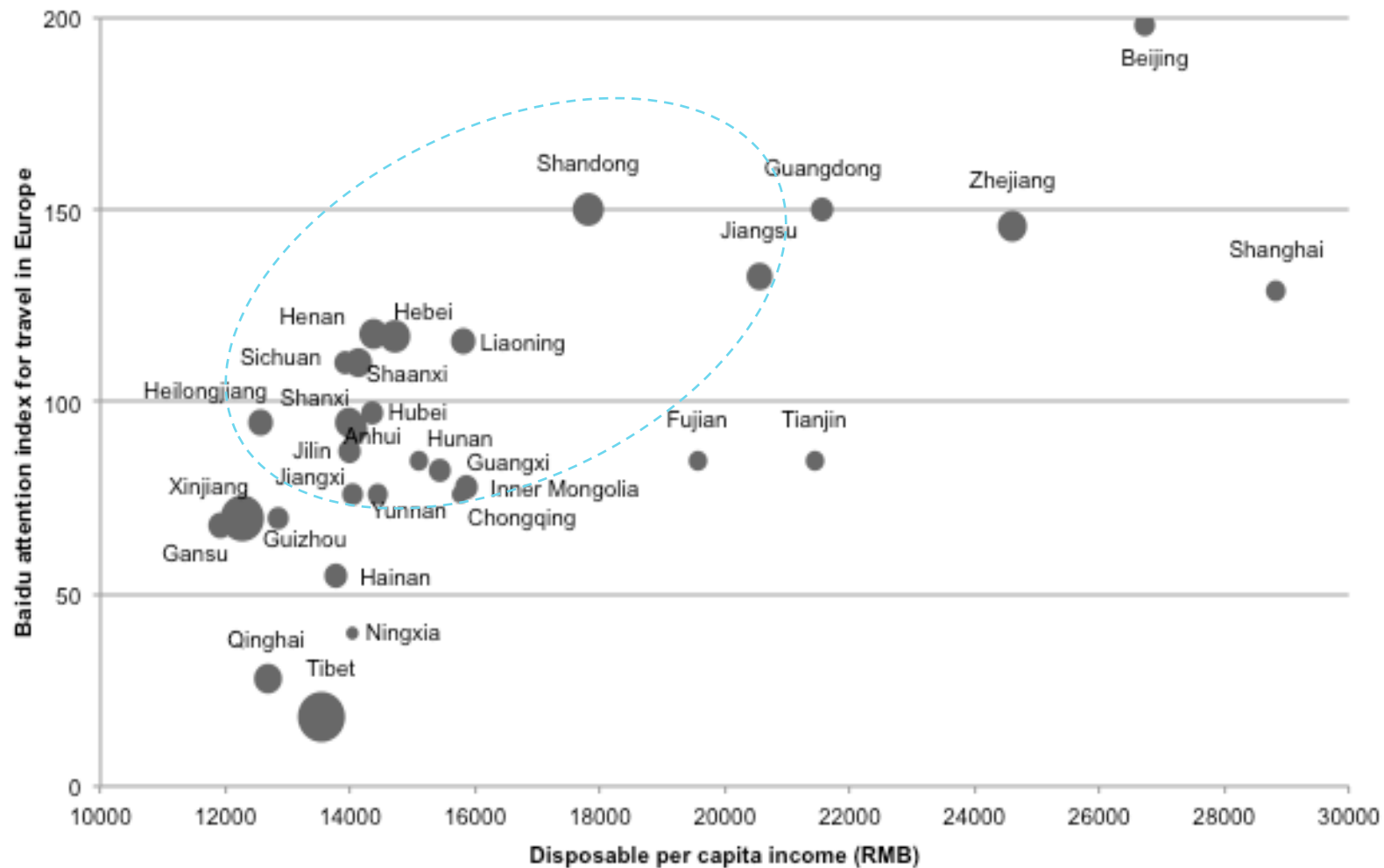


Courtesy of Chai Ran and Amina Xu.

My plan is to travel to Hungary, Austria and Italy next year. I will have a wedding veil made and bring it with me to take photos.



High potential in lower-tier cities



The planning phase

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The planning process

- Relying on *emotional connection and images*
- Research on *prices* (destinations and modes of travel)
- Decision on *where and how* – fixing the budget

- Independent travellers:
 - Research on *visa requirements* and processes
 - Research and decision on *routes and modes of transportation*
 - *Booking* of hotels and hostels
 - *Visa application*



The visa hurdle

- 26% of potential visitors to Europe cancelled their trips due to visa hurdles (ETOA)
- Entire online forums dedicated to the topic of visa application advice
- Efficient visa procedures a competitive advantage

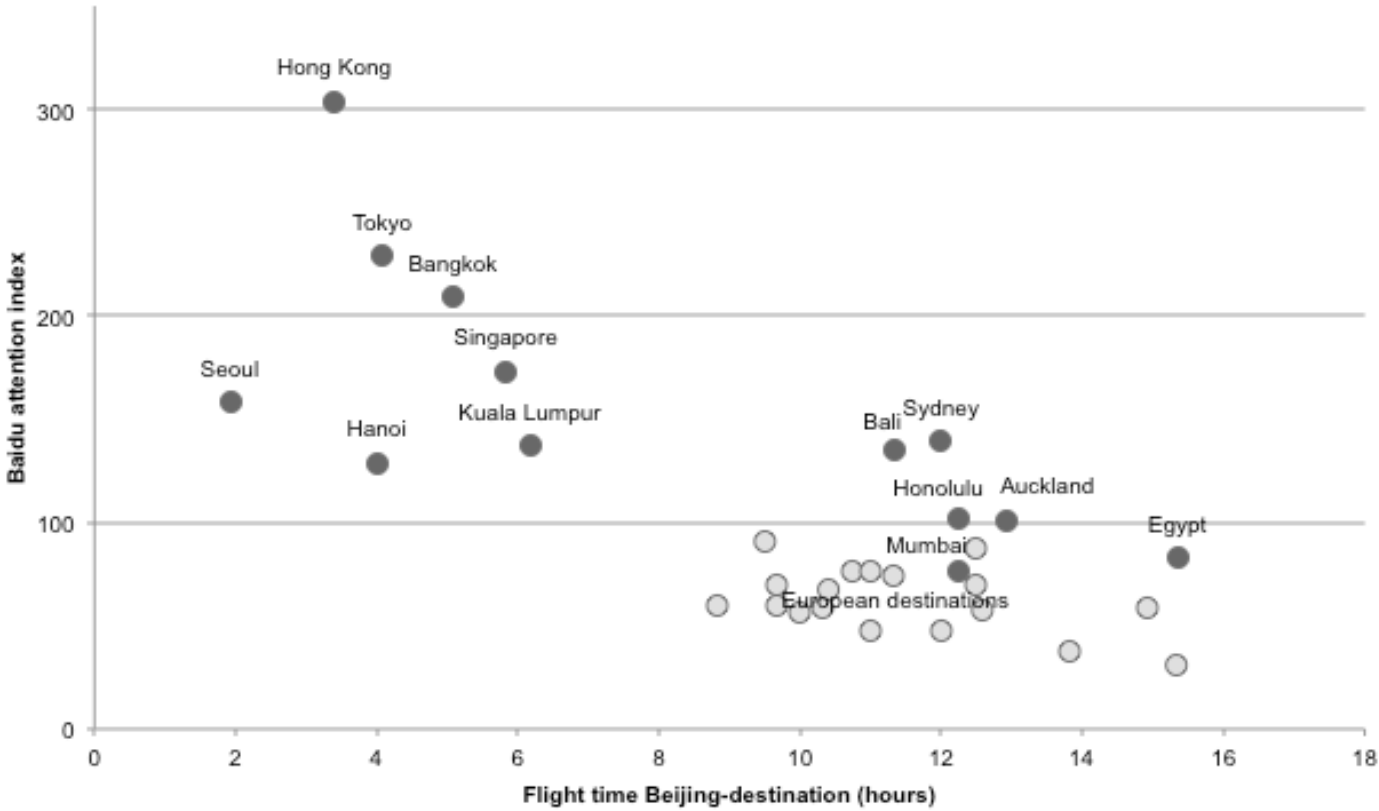


Time – a major consideration

- Time is a scarce resource
- Maximization of the number of destinations
- Small countries
- Countries within countries
- Infrastructure important



Time – a major consideration



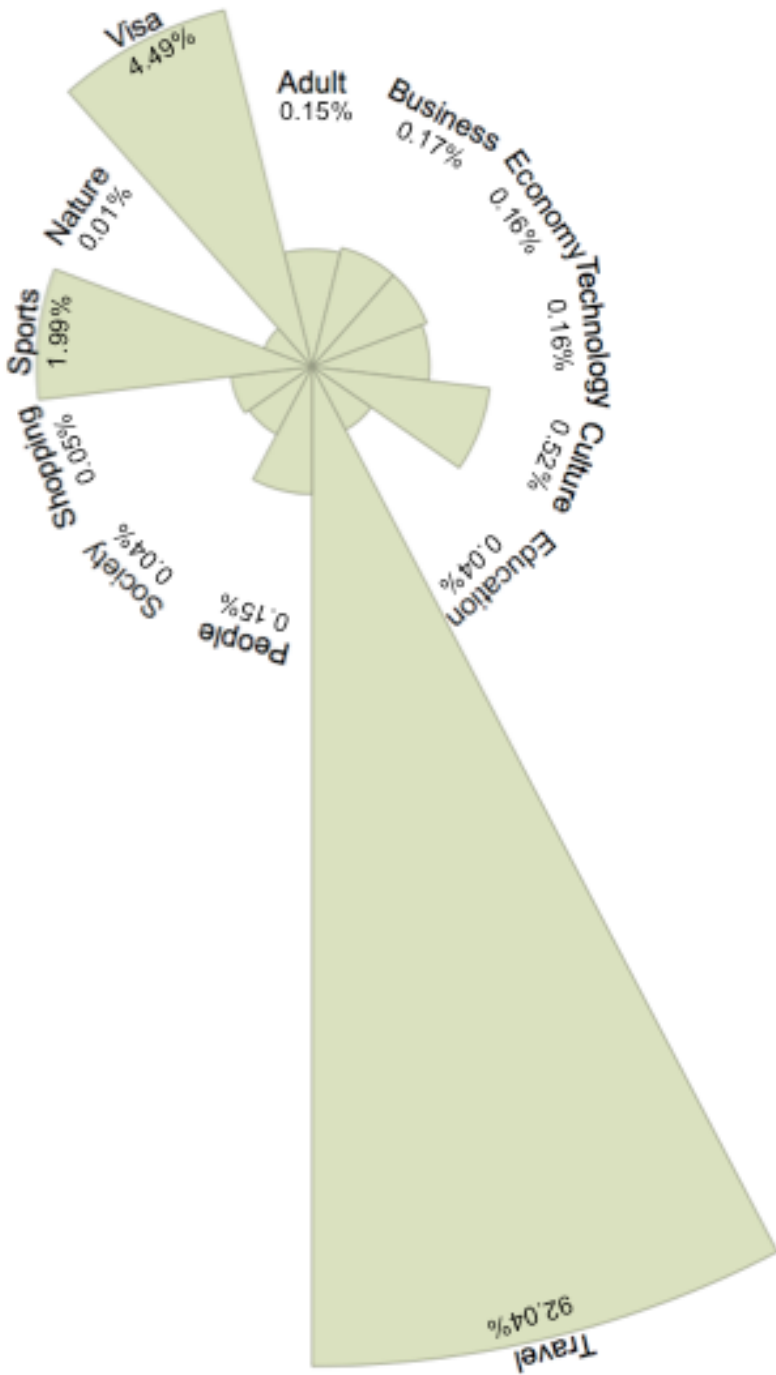
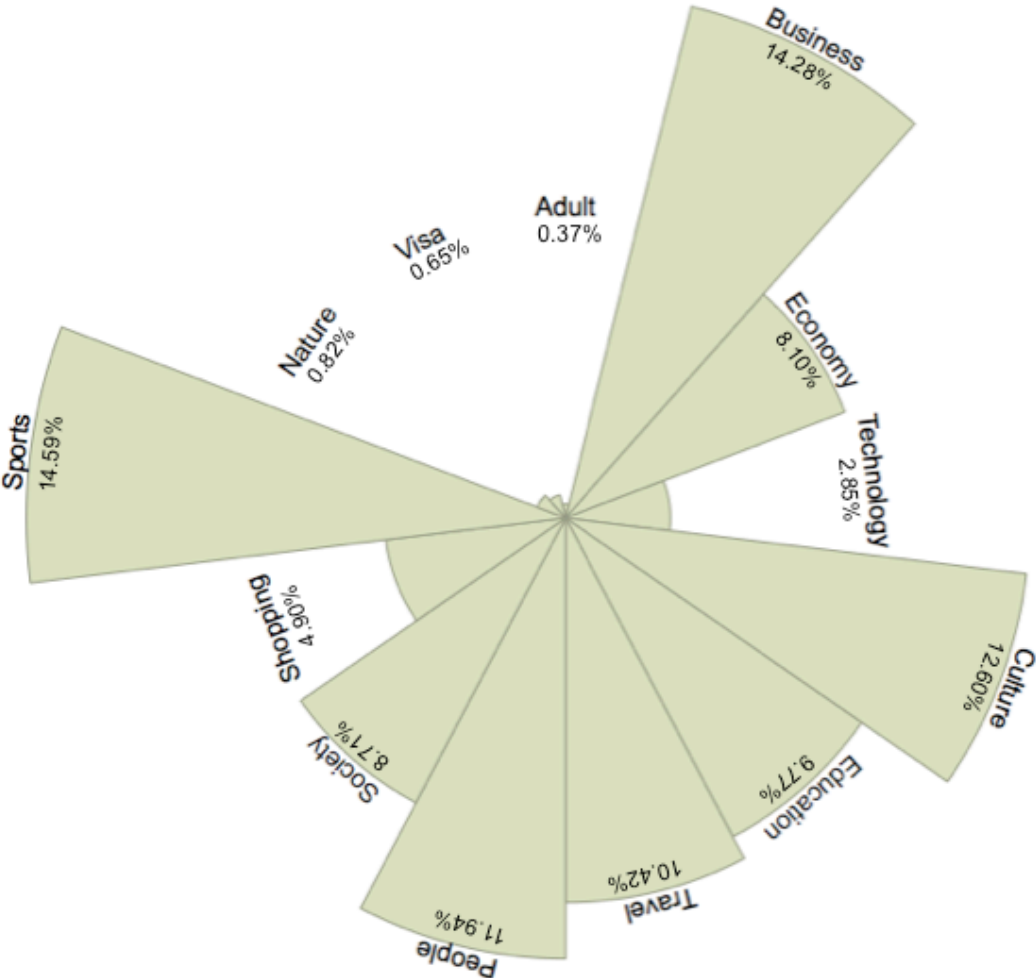
Europe in the mind of the Chinese traveller

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KAIROS
FUTURE

The image of Europe



Major themes on Europe in social media

- *Authenticity* only in certain doses
- The importance of *safety and stability*
- The role of *culture*
- *Language barriers* lead to observation rather than participation
- *Delights*: What Chinese travellers like with Europe
- *Frustrations and annoyances*: What Chinese travellers complain about when they blog about Europe



Authenticity only in certain doses

- Food: Testing the local, but preferences remain for Chinese food
- Chinese-owned hotels/hostels draw more visits
- "China outside China" – fascination with anything Chinese



The importance of safety and stability

- Sensitivity to security and political considerations
- Any event indicating lack of safety or security are likely to be thoroughly discussed in Chinese social media:
 - Political actions
 - Natural disasters
 - Epidemics
 - Protests and strikes
 - Kidnappings
 - Theft and Robberies



The role of culture

- Arts and culture of great importance
- Emotional ties and curiosity spurred by movies, music, literature and historical figures



Language barriers

- Major obstacle, especially for older generations
- Body language, dictionaries, phrase books and tour groups
- Observation rather than participation
- Chinese-speaking staff an obvious competitive advantage



Delights



- Cities are peaceful and clean and skies are blue
- Not crowded
- Good preservation of historic attractions
- Environmental protection, clean and beautiful environment
- Rich cultural past, high level of cultural sophistication
- Friendly, helpful people
- Convenient public transport
- Busses leave on time
- Advanced train system
- Delicious and safe food
- Good roads for driving



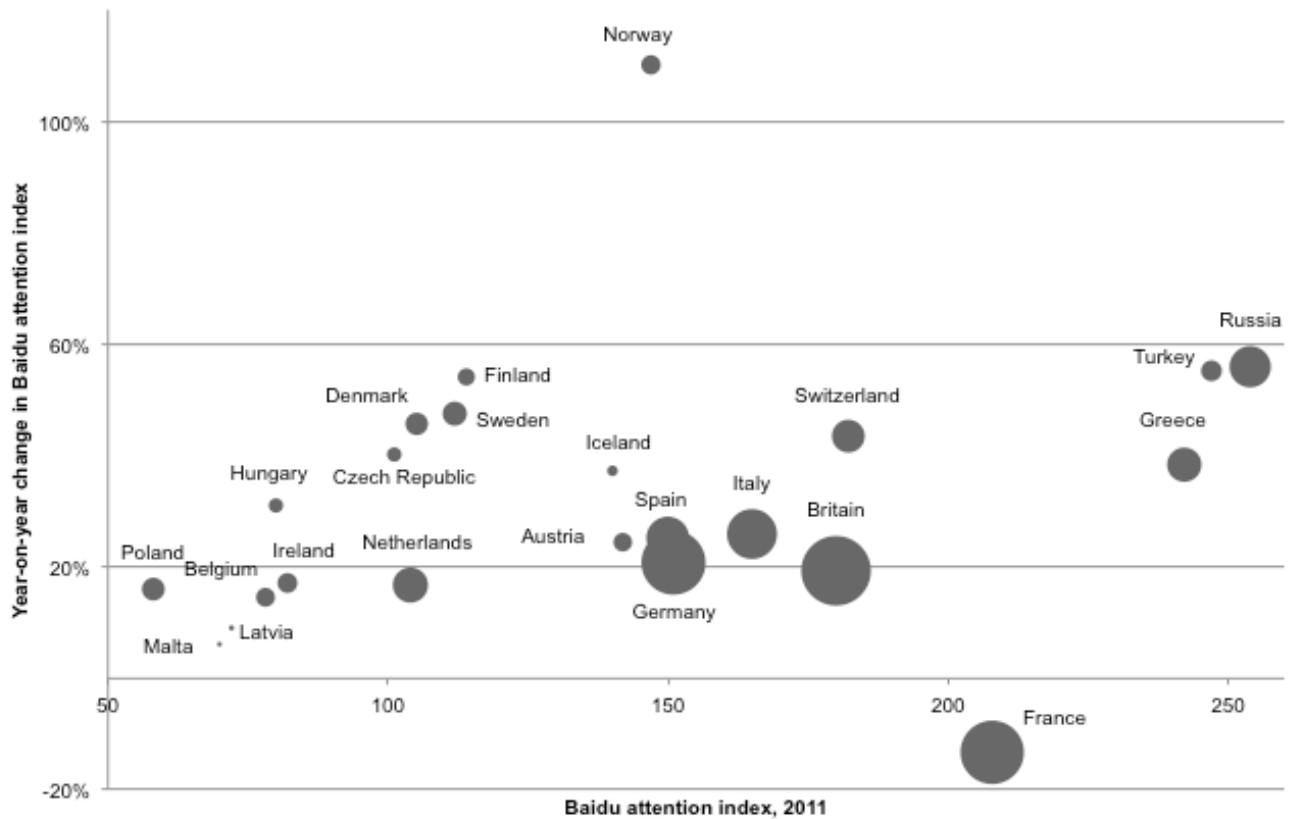
Frustrations and Annoyances



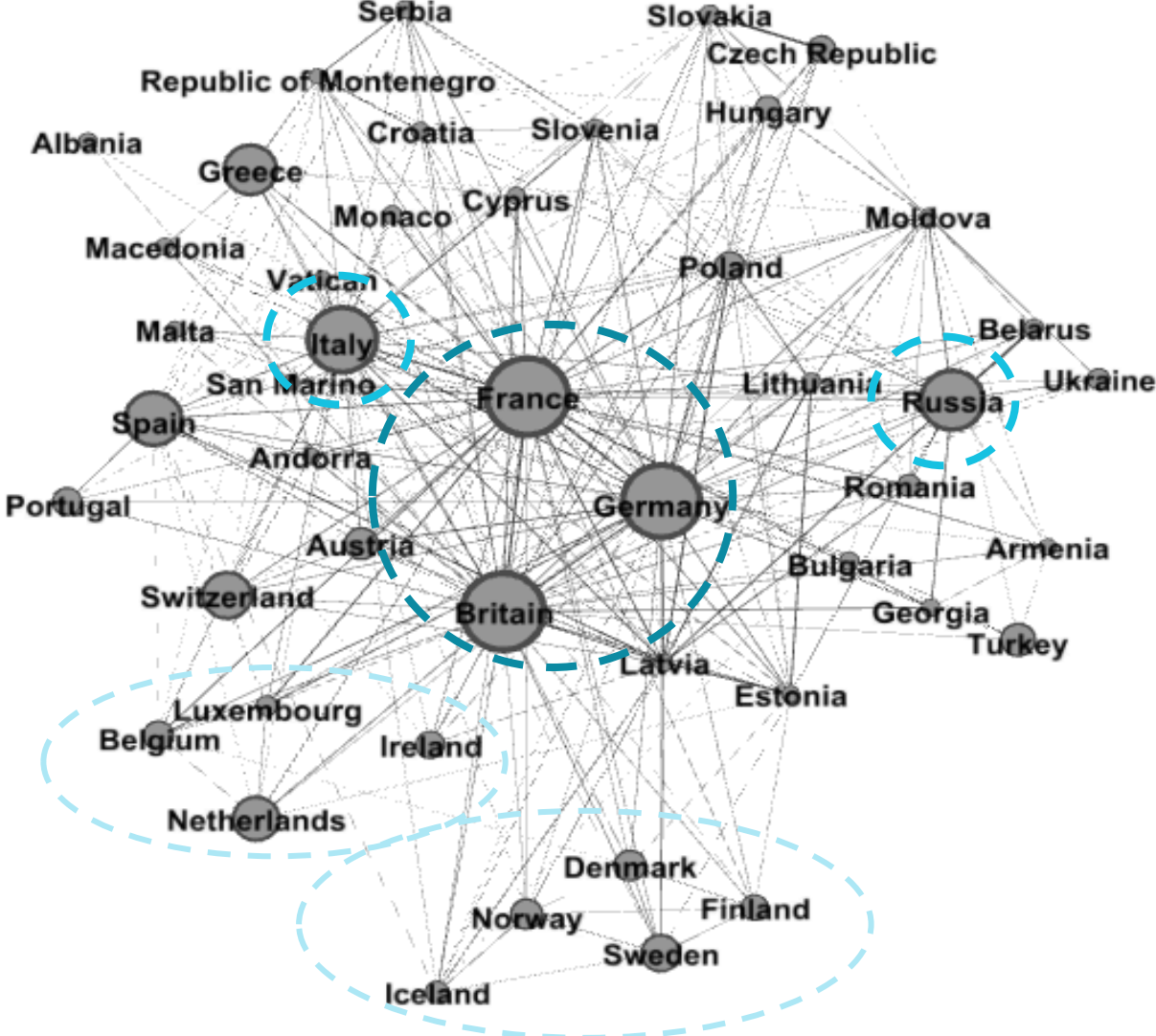
- High prices
- Tedious visa application process
- Lack of Chinese language information and material
- Unable to use Chinese debit cards in most places
- Bad food in general and bad Chinese food in particular
- Need to pay to use toilets
- Different currencies
- Lacking public transportation at some destinations
- Shops close early
- Bad service
- Low work efficiency and lack of service staff
- Worse service and facilities in European hotels than in Chinese ones
- Expensive highway fees in some countries
- Rude and rigid customs
- Graffiti pollute city appearance



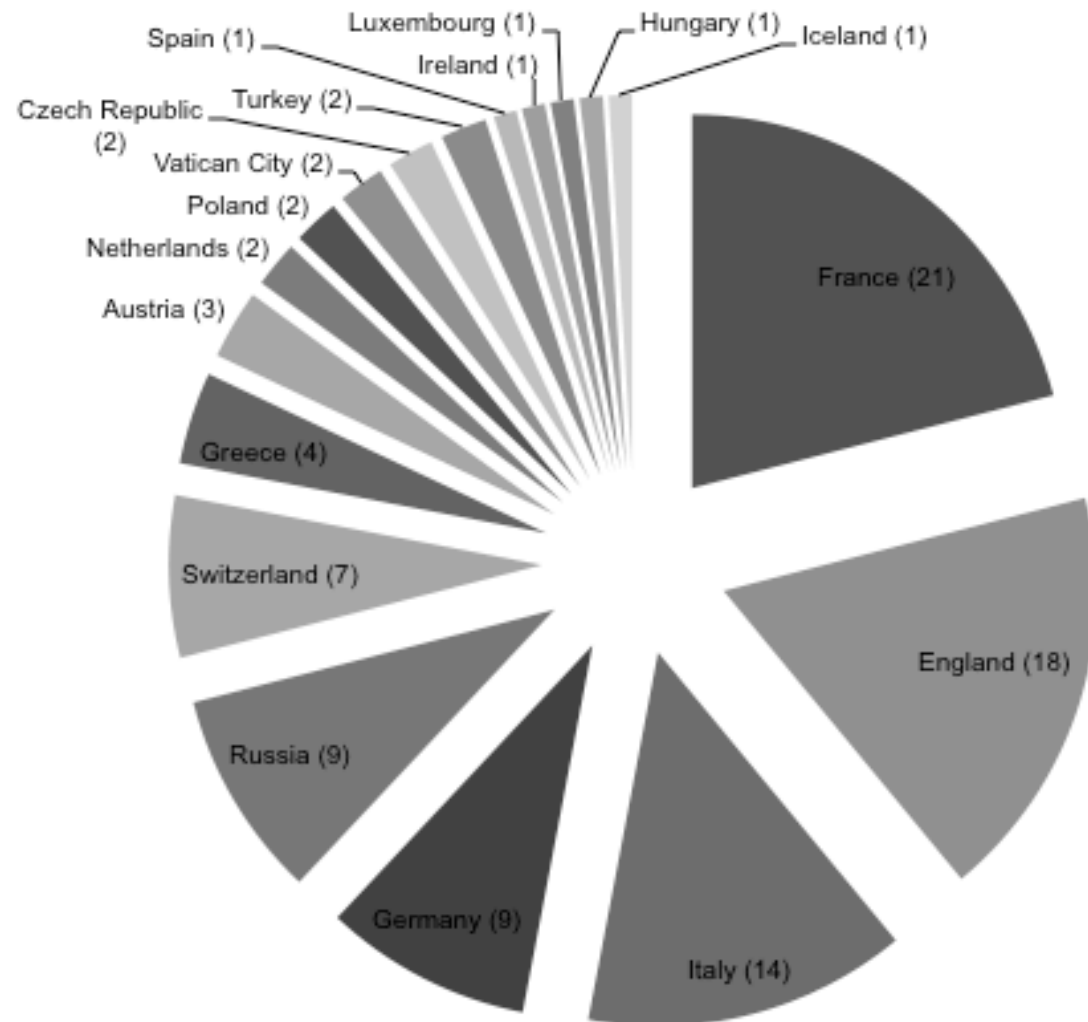
General interest



Mental travel routes



Location of top-100 attractions



Conclusions

- Don't overlook the traditionalists...
- ... but focus on quality
- Know your tribe
- Start with the planning phase
- Storify your destination
- "China-friendly" your authentic offer
- Assist the shoppers
- Consider your value-for-time proposition
- Set the stage for interaction

