

出境旅游价格指数与客源市场分析

China Outbound Tourism Price Index & Analysis of Tourist Source Market

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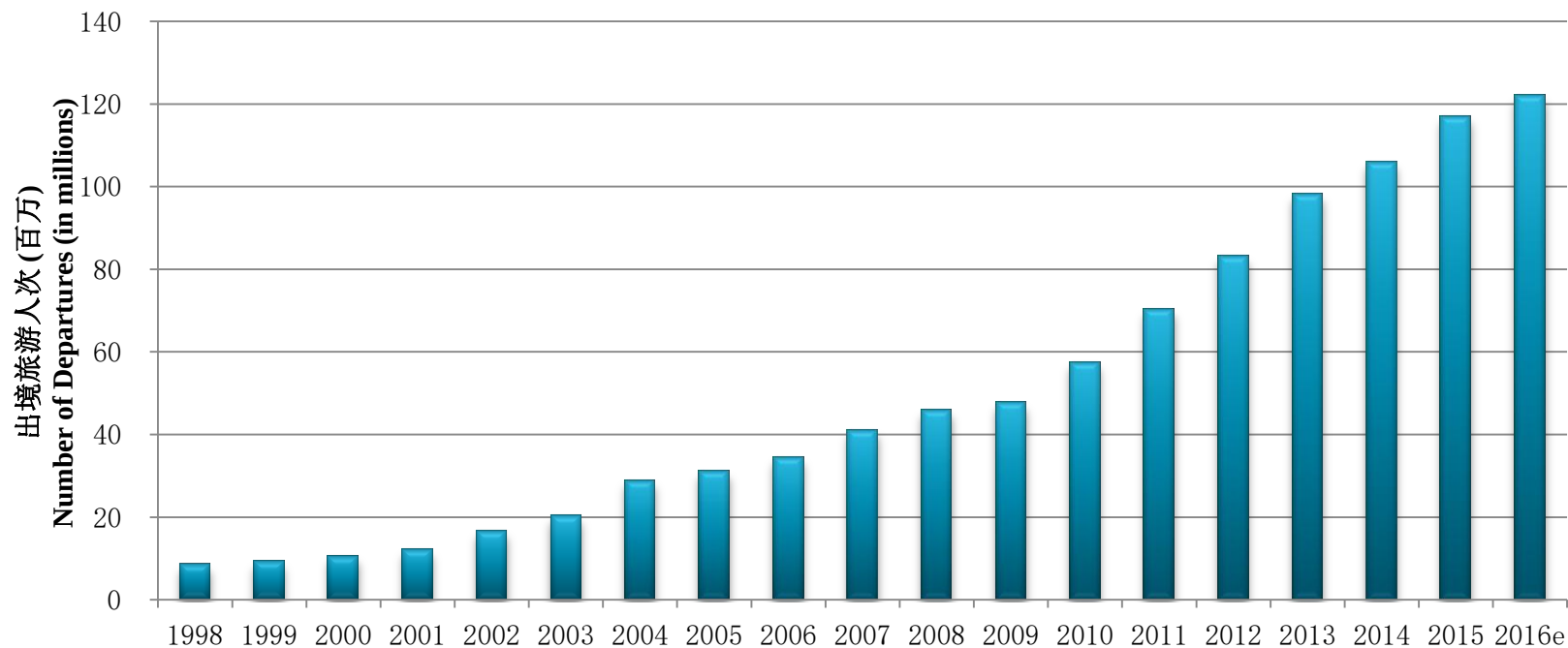
艾威联合旅游顾问机构

Ivy Alliance Tourism Consulting

Jan 9, 2017 Beijing

中国出境旅行市场发展

Chinese Outbound Travel – Booming Market



中国出境旅游价格指数（OPI）

CHINA OUTBOUND-TOURISM PRICE INDEX (OPI)

出境旅游价格指数报告 CHINA OUTBOUND-TOURISM PRICE INDEX

2016



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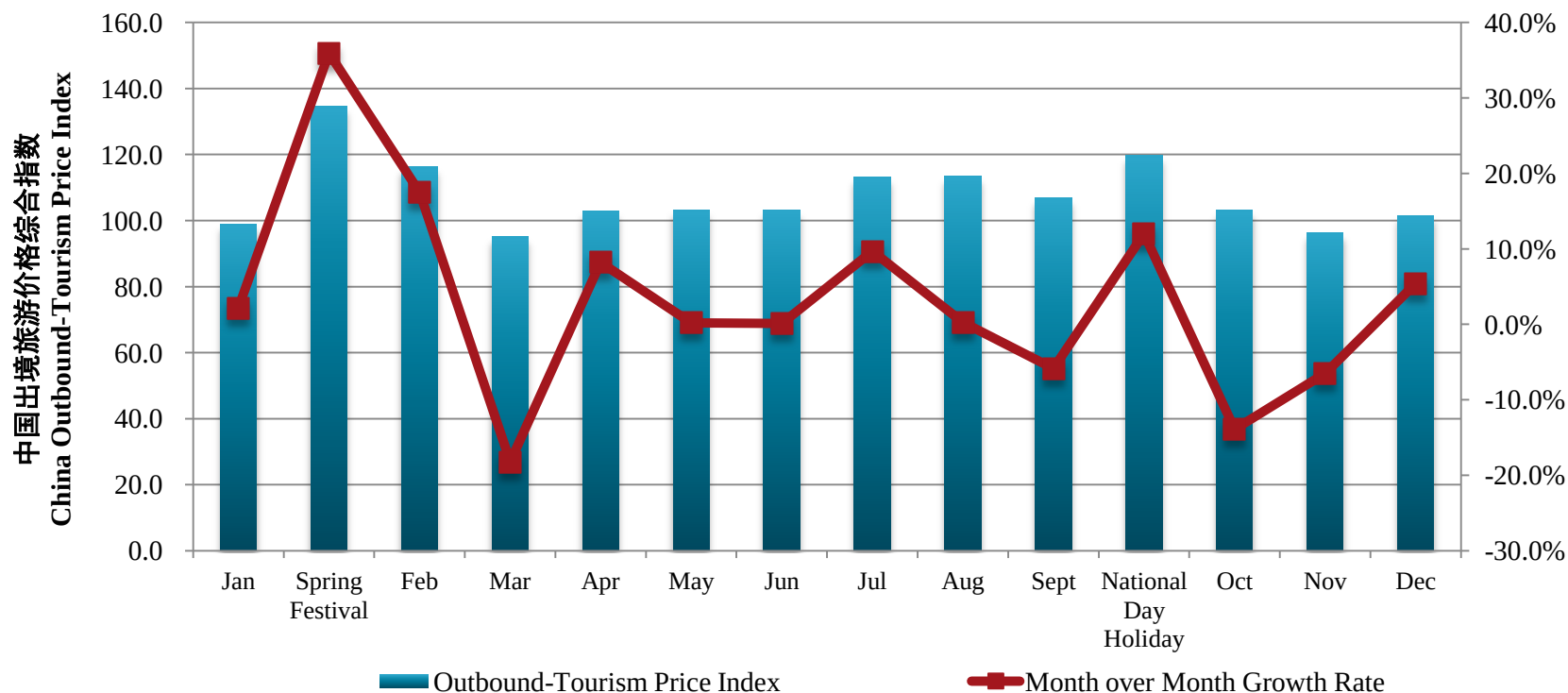
- 出境旅游价格综合指数（OPI）是反映中国公民赴全球各目的地旅游产品及其价格变化的指标体系。
- 通过对全国主要客源城市的众多有代表性的出境旅游运营商及其旅游产品进行月度检测，以大数据采集和分析为基础，按照出境旅游客流的目的地空间流向、产品类型和客源地进行分类比较研究，通过研发和设计反映市场变化的数学模型，以抽象化的指数系统反映出境旅游市场价格的总体情况。
- OPI指数的发布对适时了解和把握中国出境旅游市场总体情况和产品价格结构变化具有重要意义。



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2016年1-12月出境旅游价格综合指数

China Outbound-Tourism Price Index (Jan. 2016-Dec. 2016)

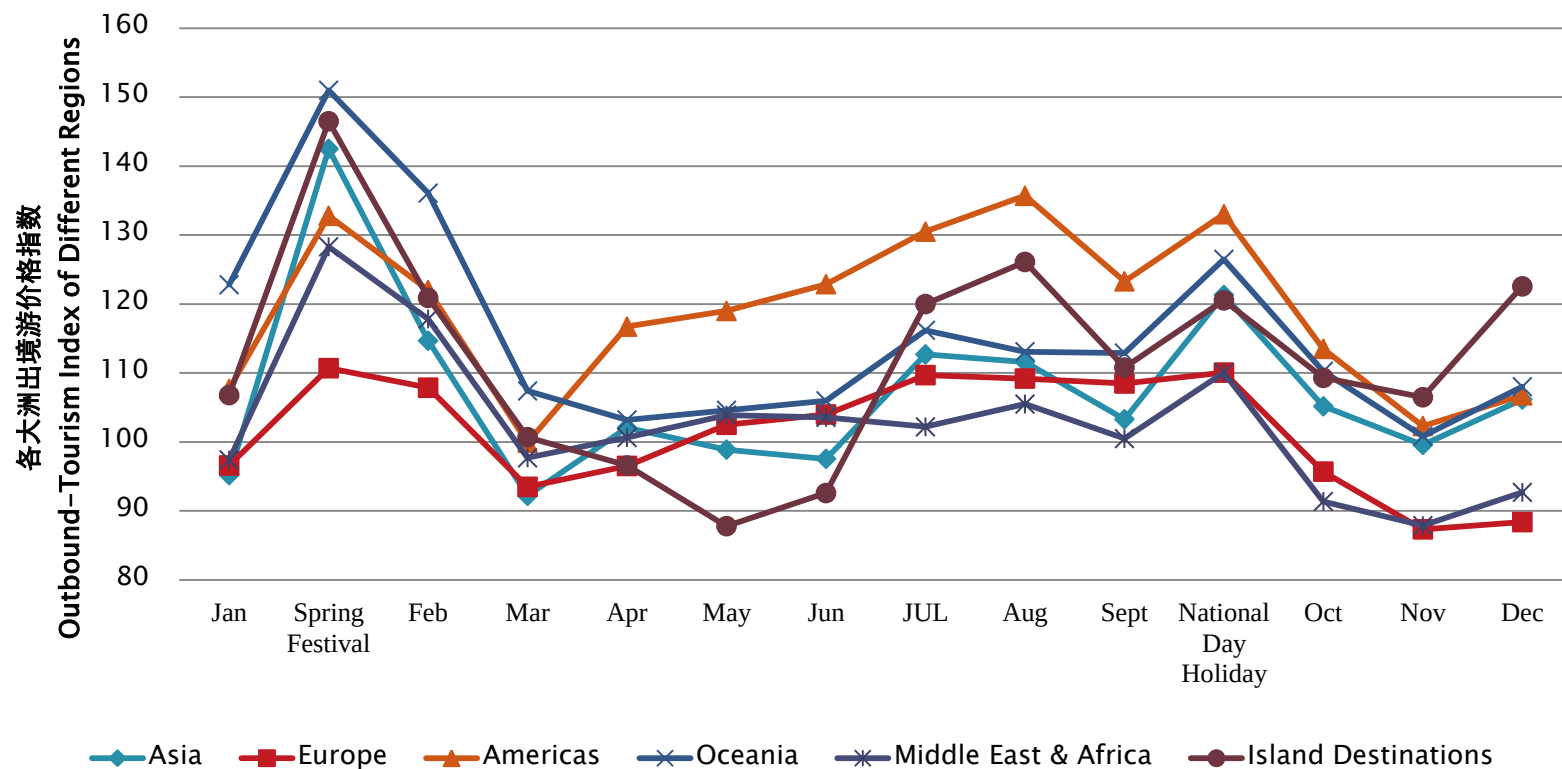


Chinese outbound tourism seasonality: Peaks during two Golden week holidays and summer months;

The greatly increased demands pushed up the outbound tour prices during Chinese New Year

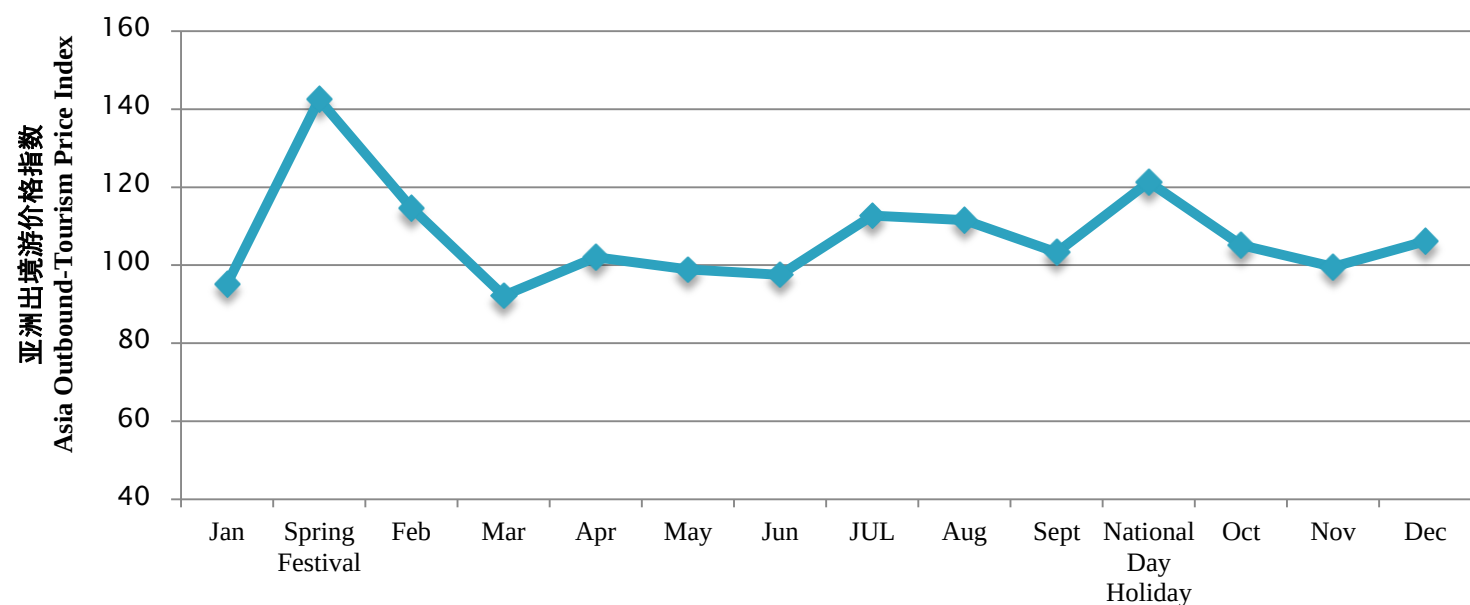
各大洲目的地旅游价格指数2016

China Outbound-Tourism Price Index of Different Regions 2016



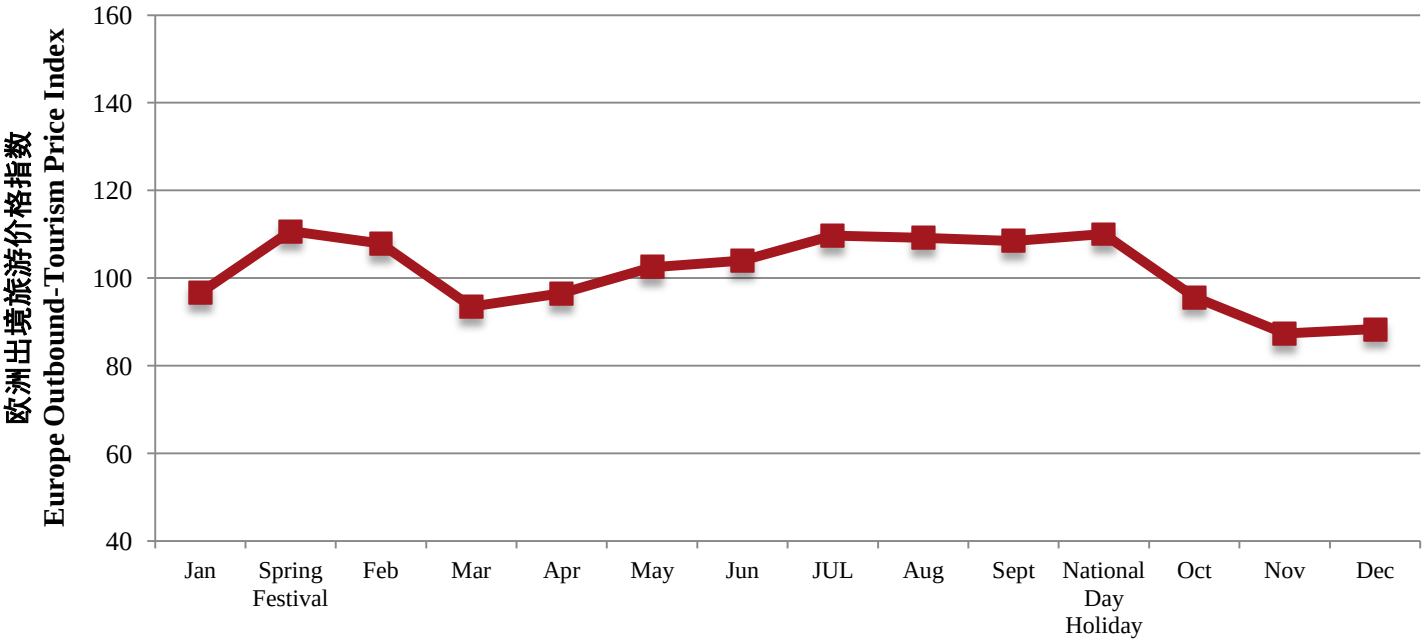
亚洲目的地旅游价格指数 (2016)

China Outbound-Tourism Price Index of Asian Destinations



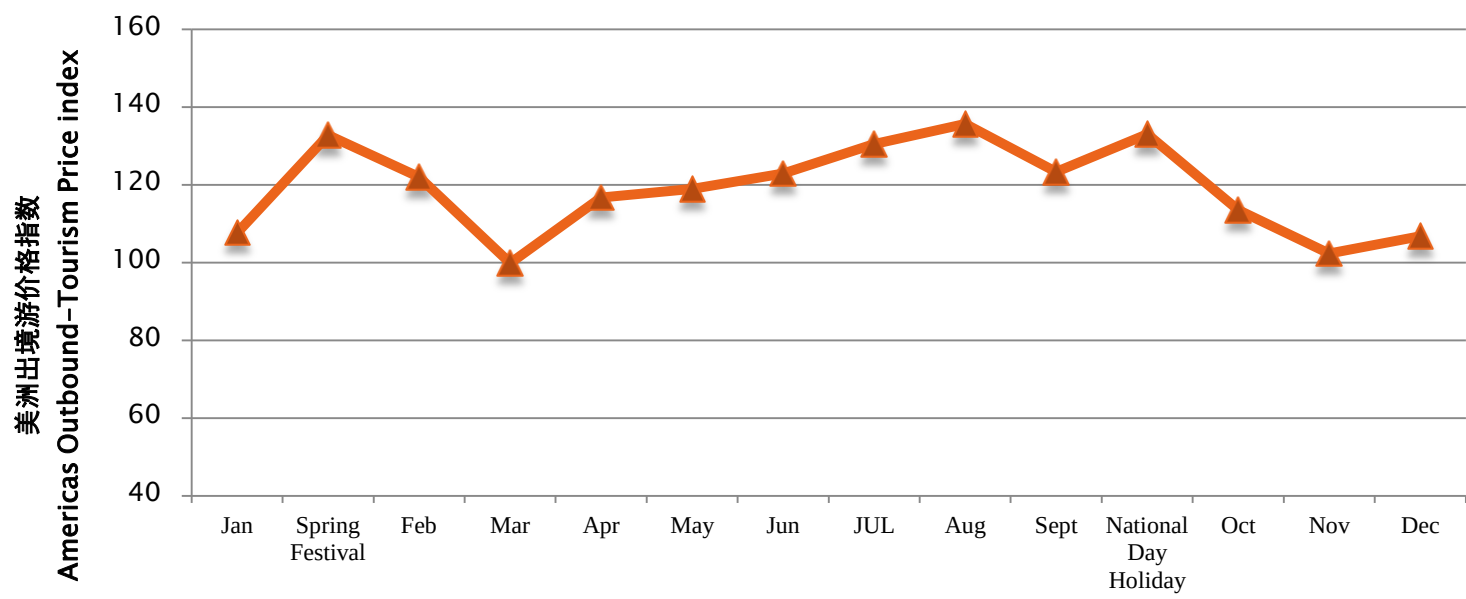
欧洲目的地旅游价格指数 (2016)

China Outbound Travel Price Index of European Destinations 2016



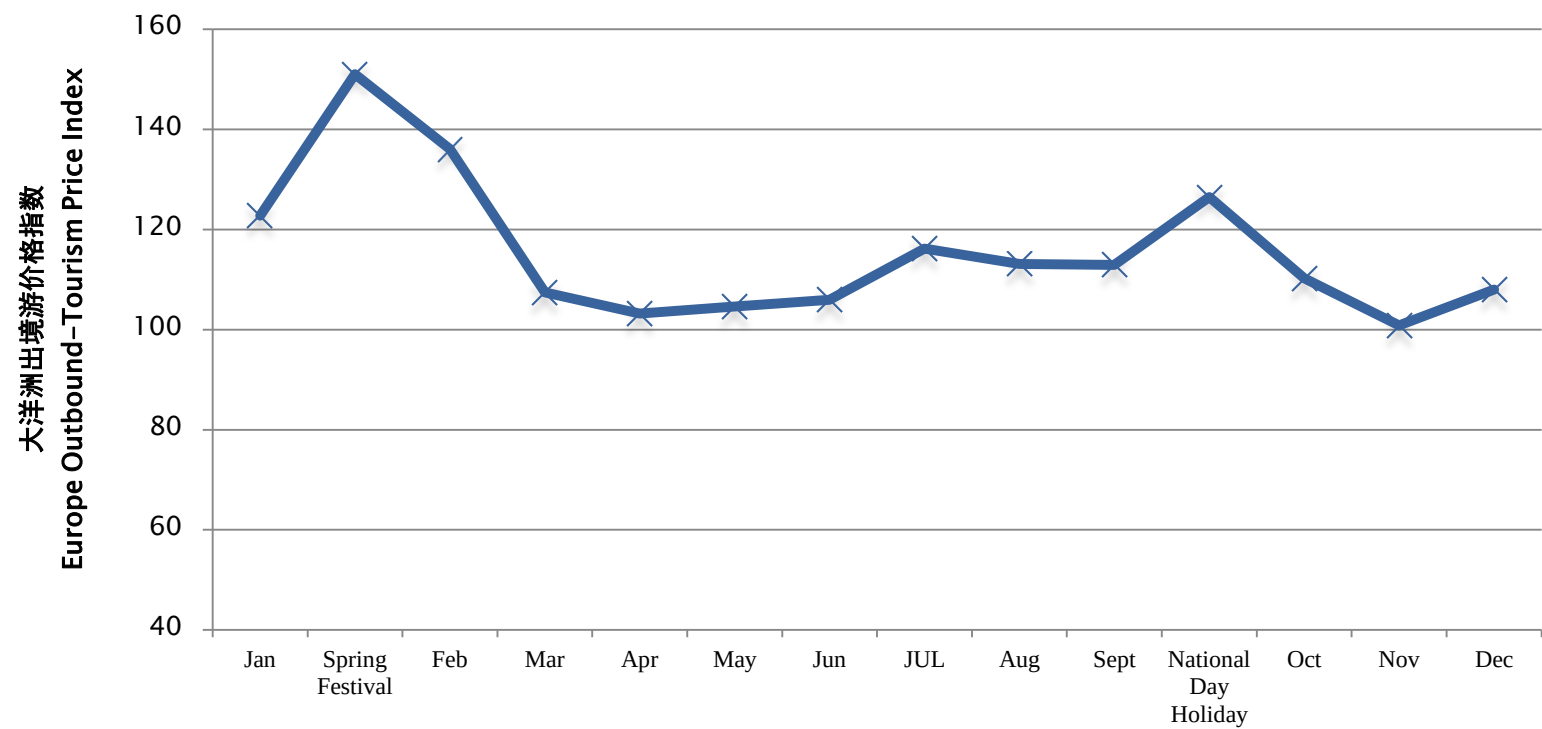
美洲目的地旅游价格指数 (2016)

China Outbound Travel Price Index of Americas Destinations



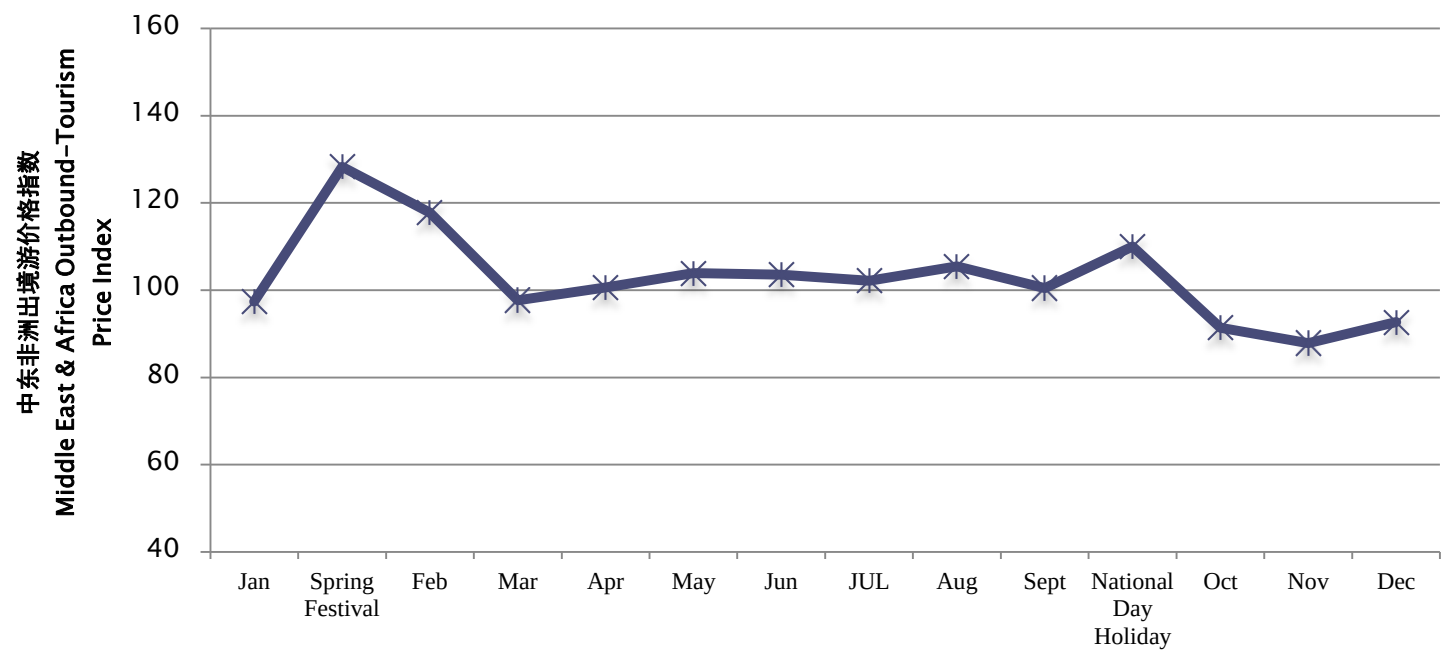
大洋洲目的地旅游价格指数 (2016)

China Outbound Travel Price Index of Oceania Destinations 2016



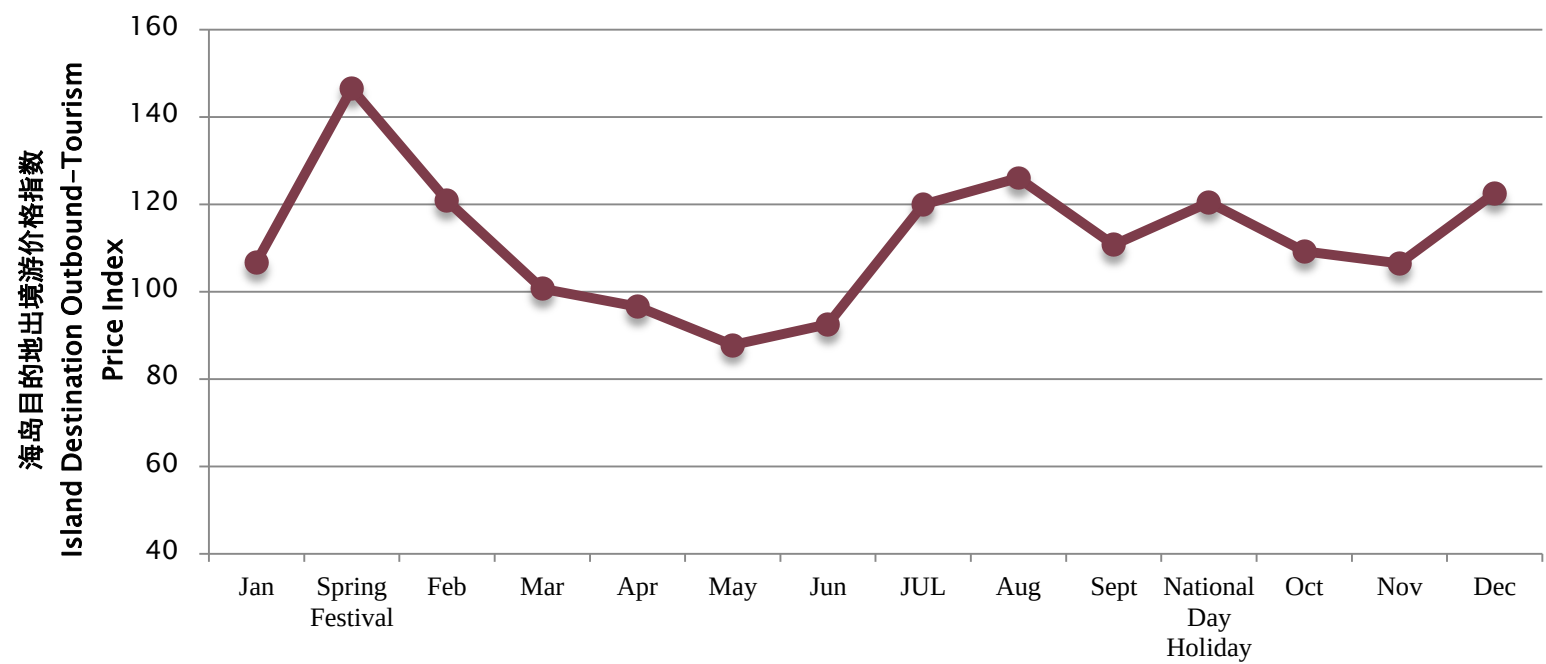
中东非洲目的地旅游价格指数 (2016)

China Outbound Travel Price Index of Middle East & Africa Destinations



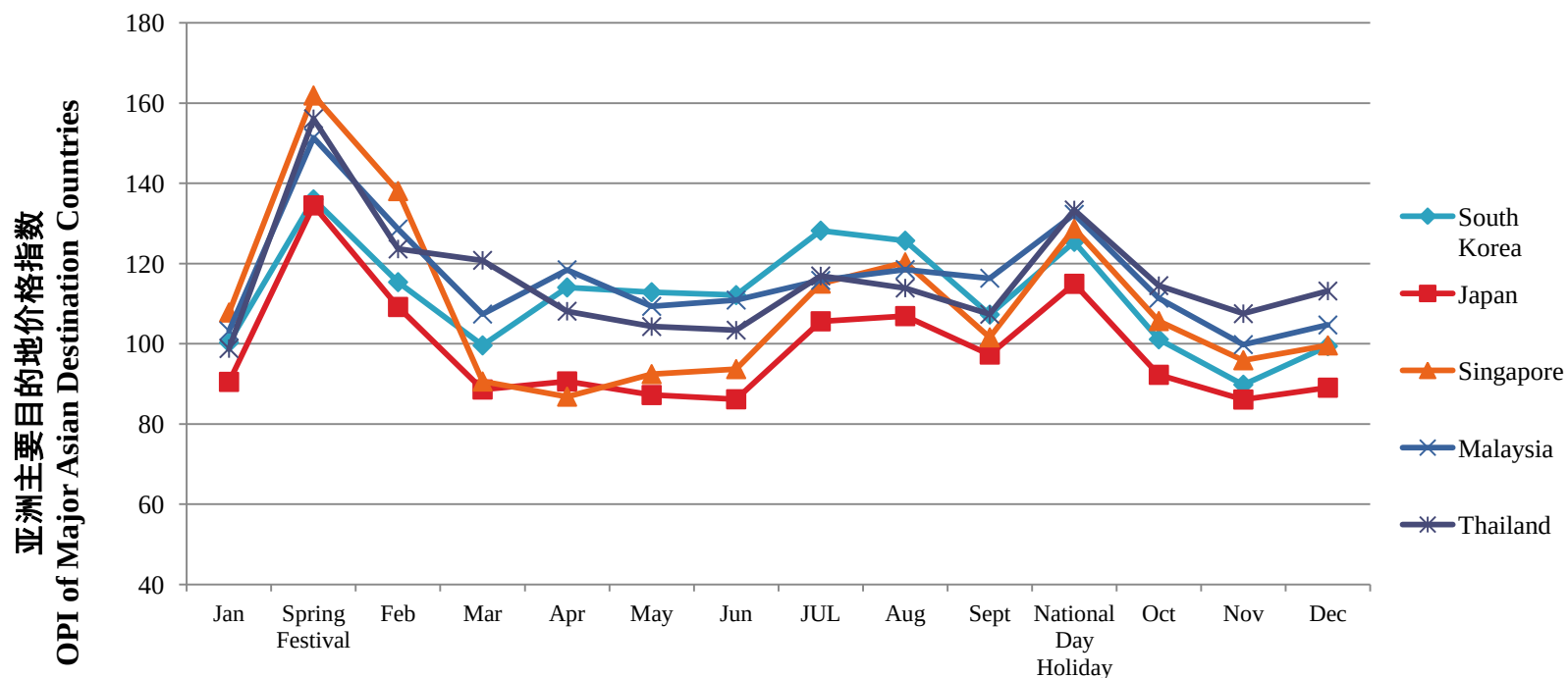
海岛目的地旅游价格指数 2016

China Outbound Travel Price Index of Island Destinations 2016



亚洲目的地国家旅游价格指数 2016

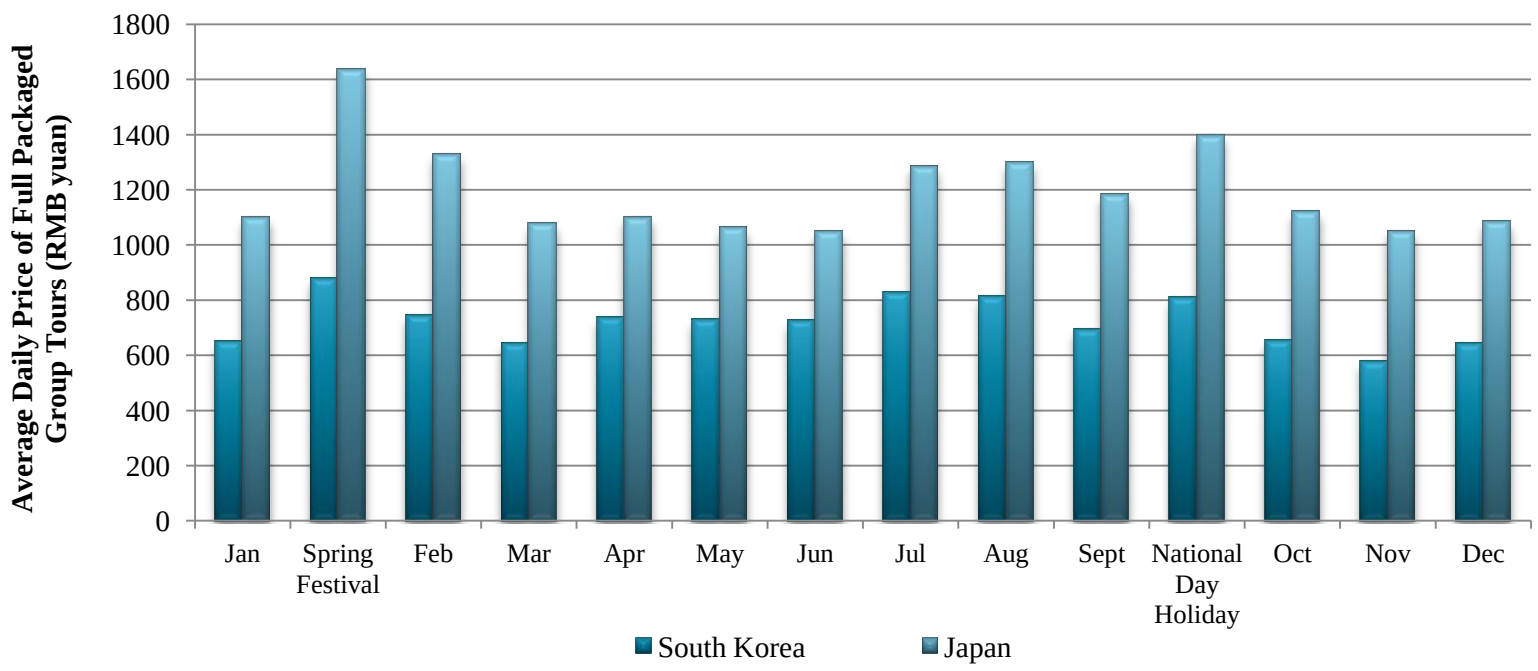
China Outbound -Tourism Price Index of Major Asian Countries



亚洲目的地国家旅游产品日均价格 2016

Average Daily Price of Outbound Tour Products to Major Asian Countries

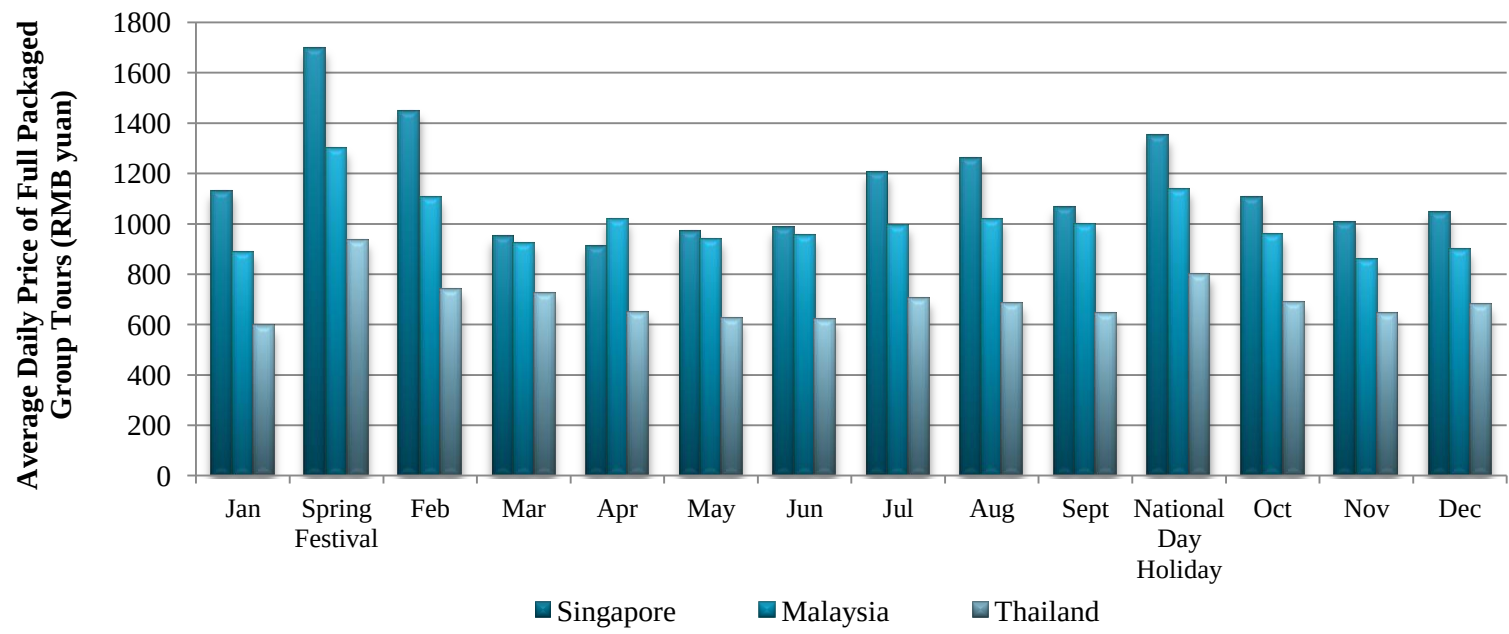
东亚国家 East Asian Countries



亚洲目的地国家旅游产品日均价格 2016

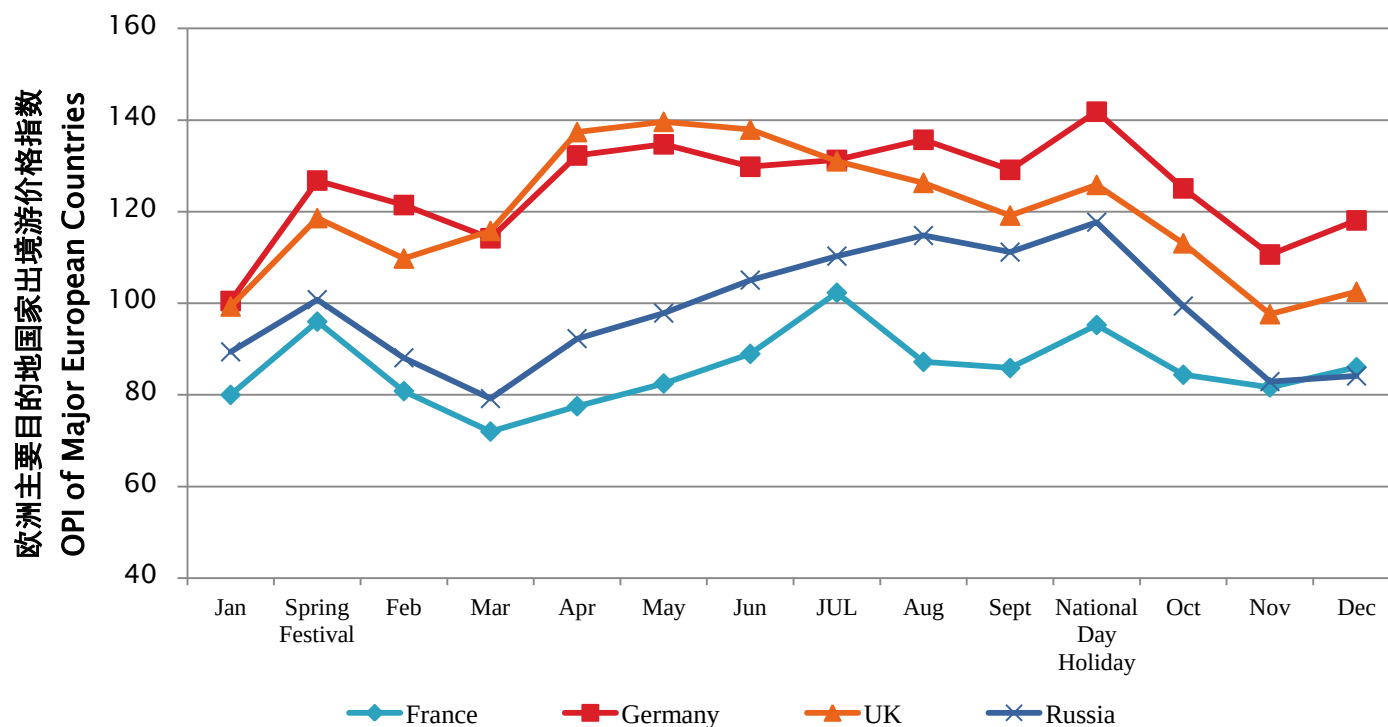
Average Daily Price of Outbound Tour Products to Major Asian Countries

东南亚国家 Southeast Asian Countries



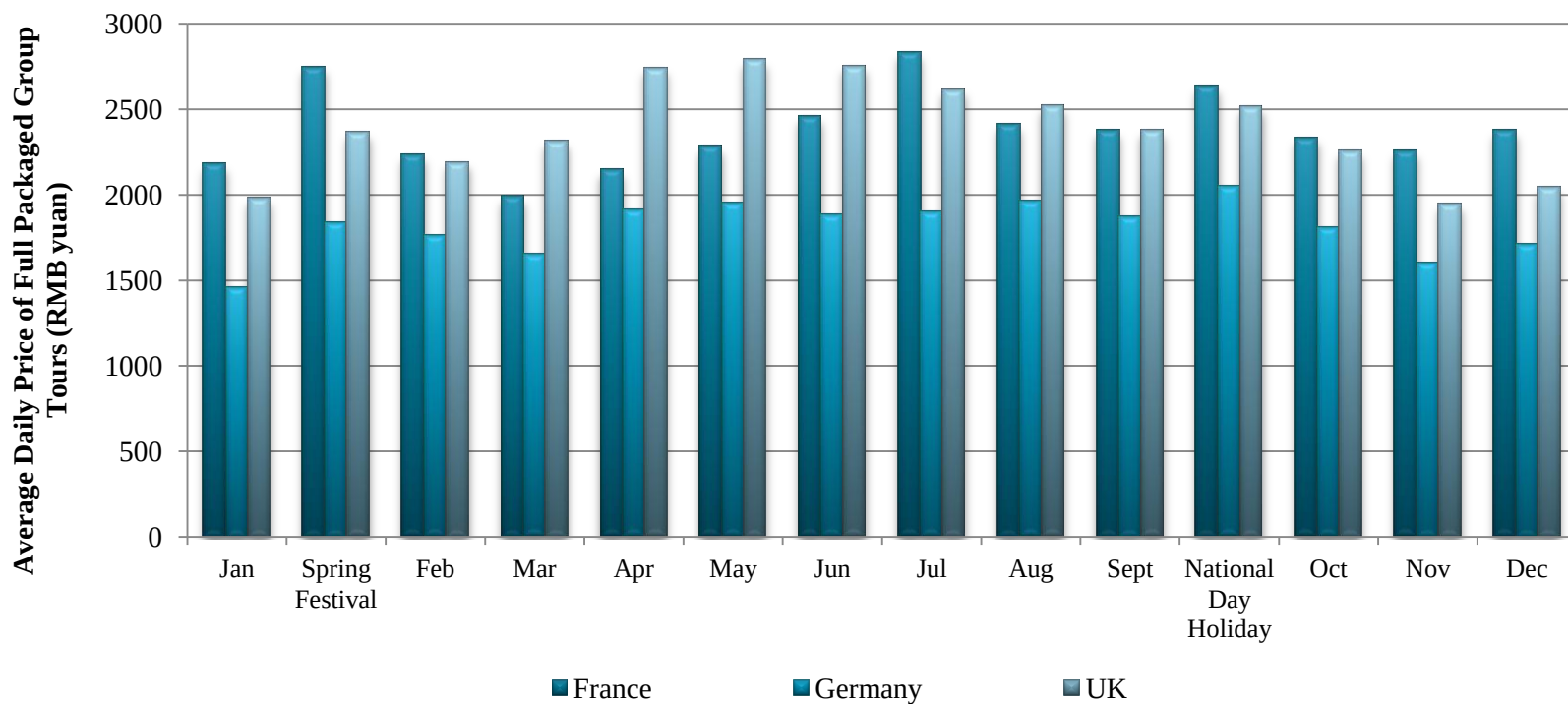
欧洲部分目的地国家旅游价格指数 2016

China Outbound -Tourism Price Index of Some European Countries



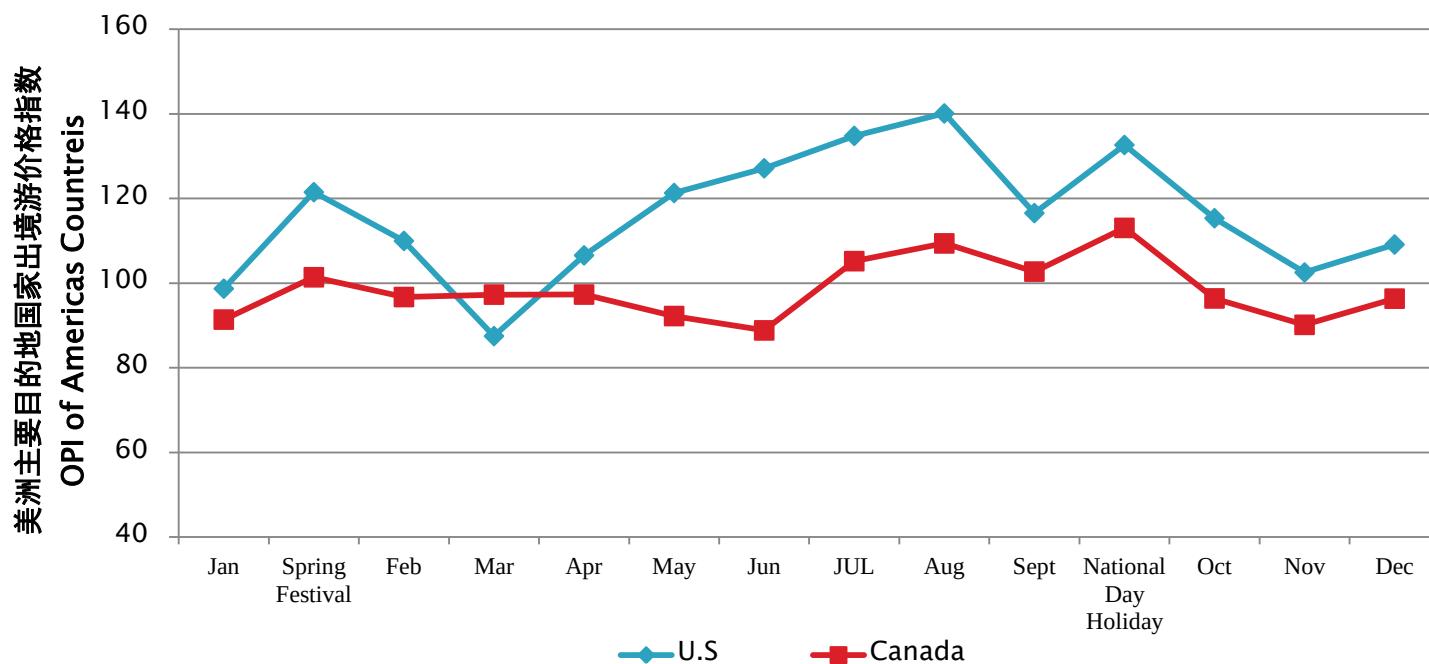
欧洲部分目的地国家旅游产品日均价格 2016

Average Daily Price of Outbound Tour Products to Some European Countries



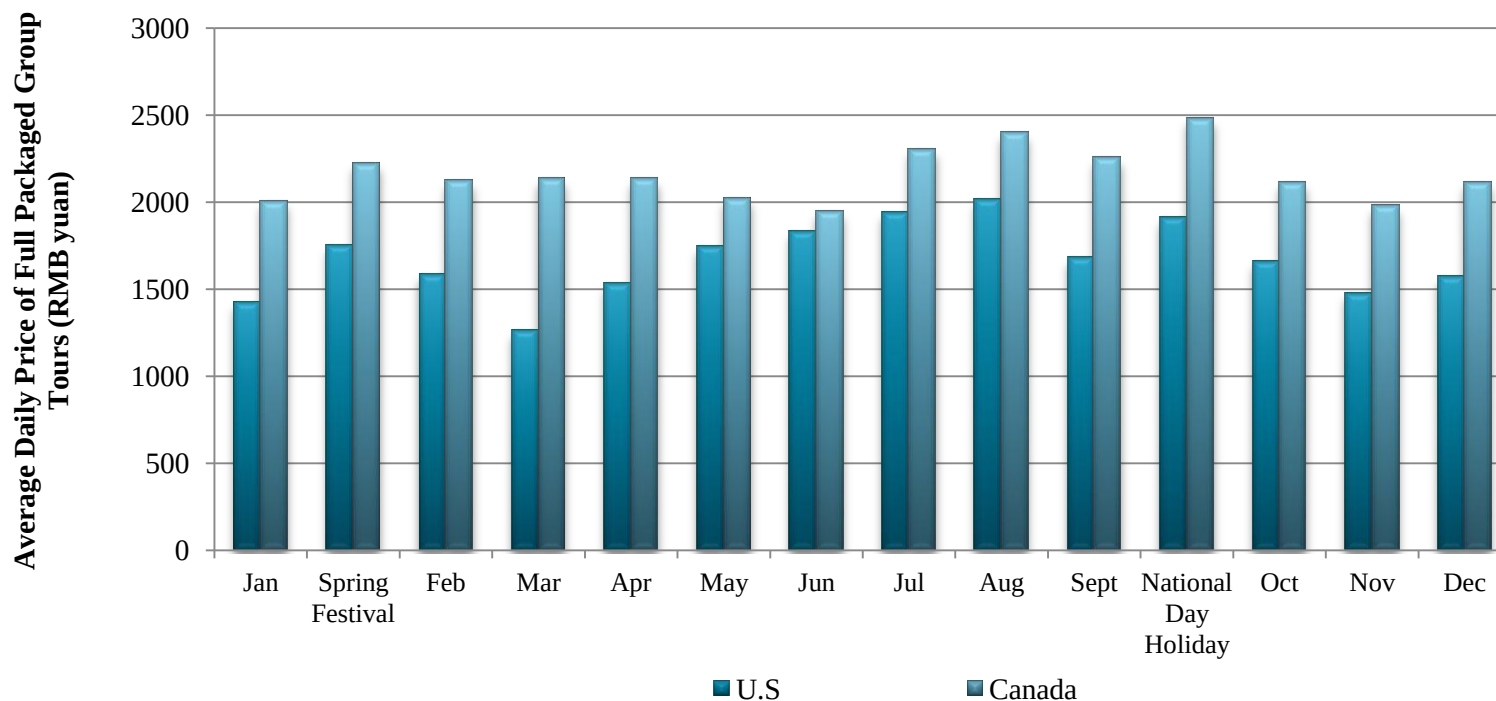
美洲主要目的地国家旅游价格指数 2016

China Outbound -Tourism Price Index of Major Americas Countries



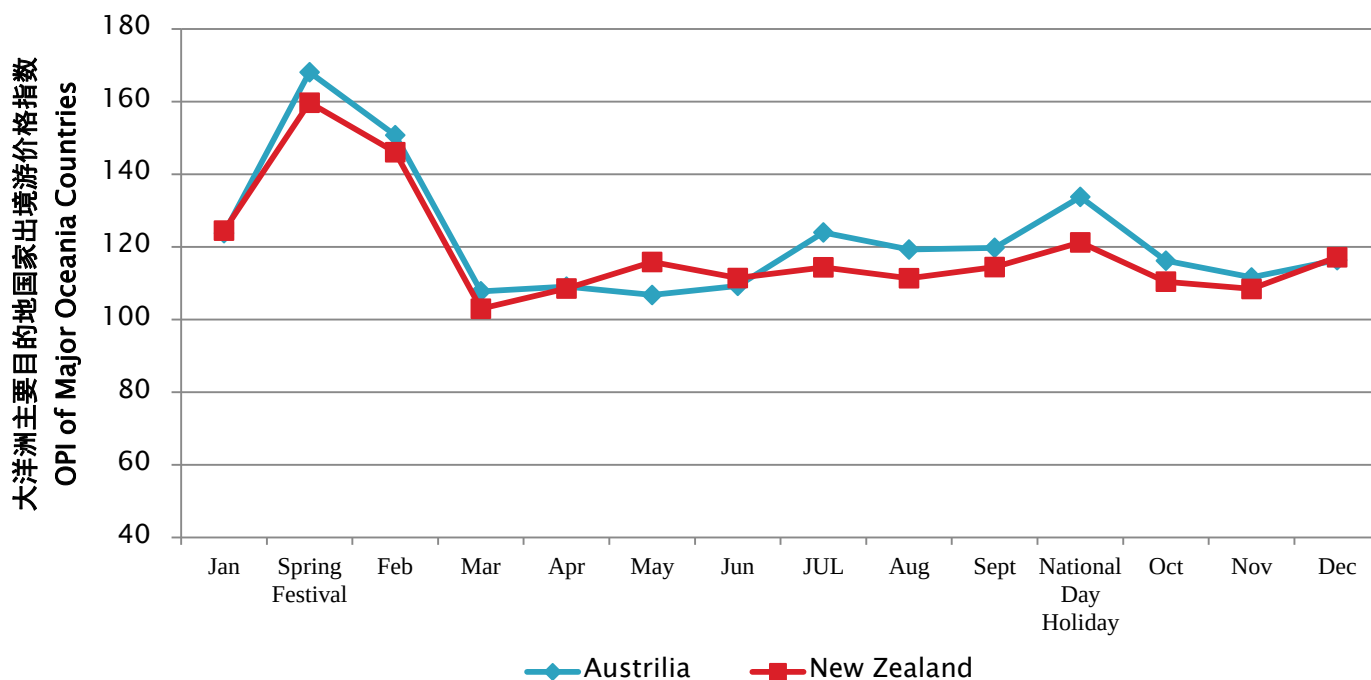
美洲主要目的地国家出境旅游产品日均价格 2016

Average Daily Price of Outbound Tour Products to Major American Countries



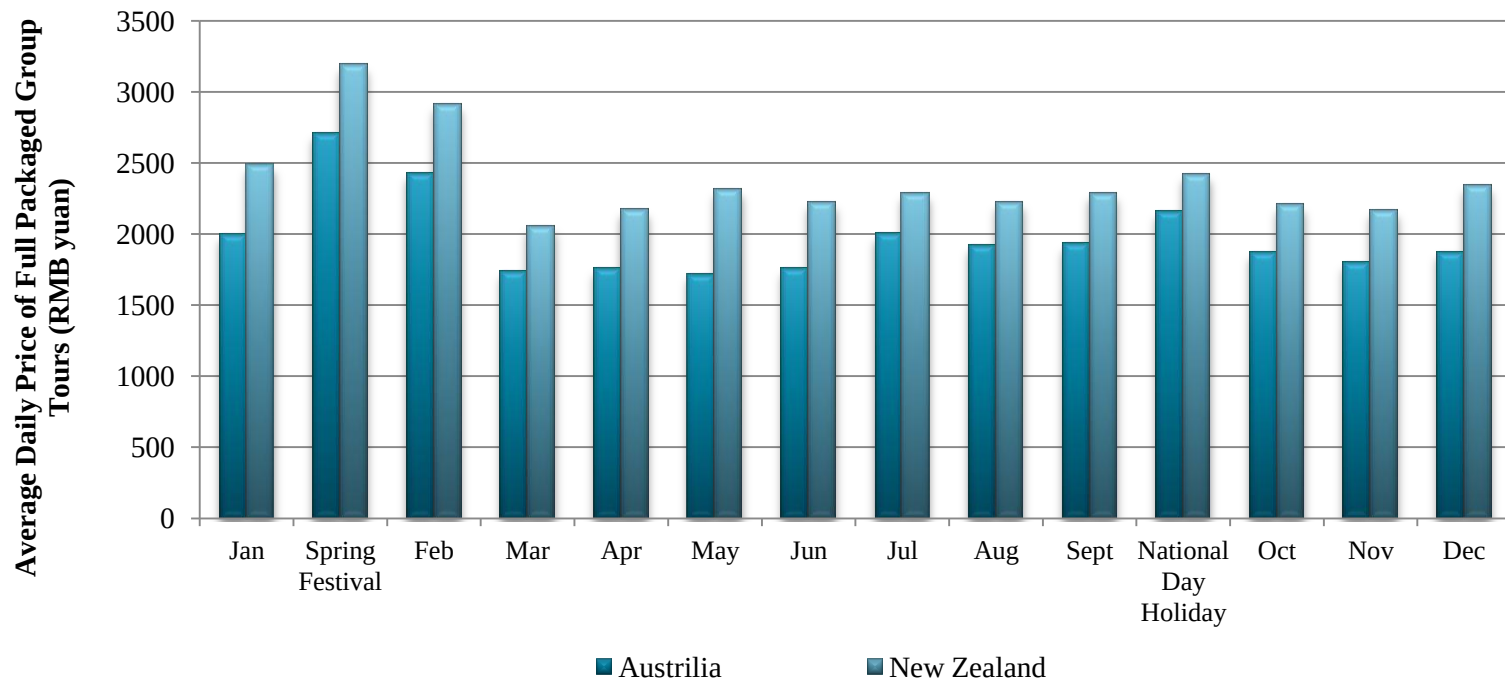
大洋洲主要目的地国家旅游价格指数 2016

China Outbound -Tourism Price Index of Major Oceania Countries



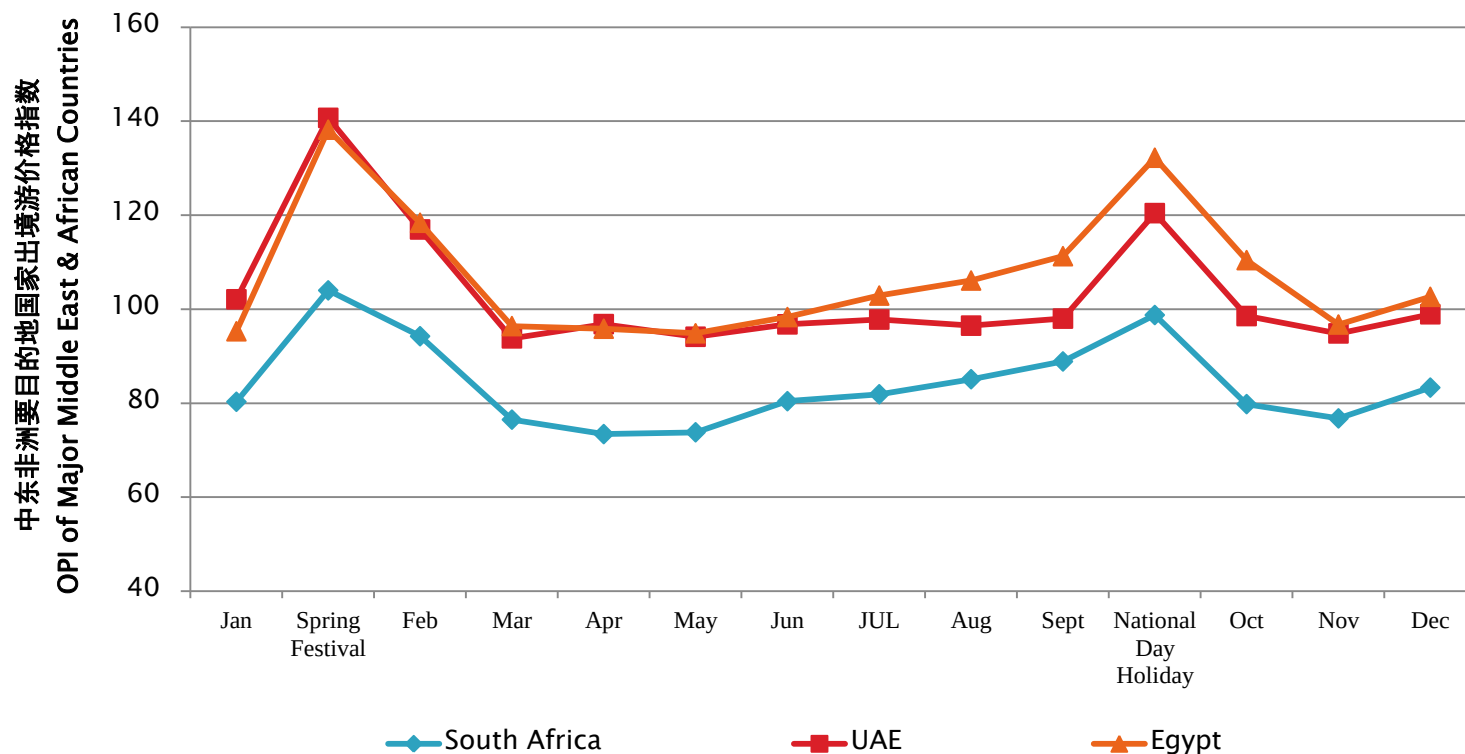
大洋洲主要目的地国家旅游产品日均价格 2016

Average Daily Price of Outbound Tour Products to Major Oceania Countries



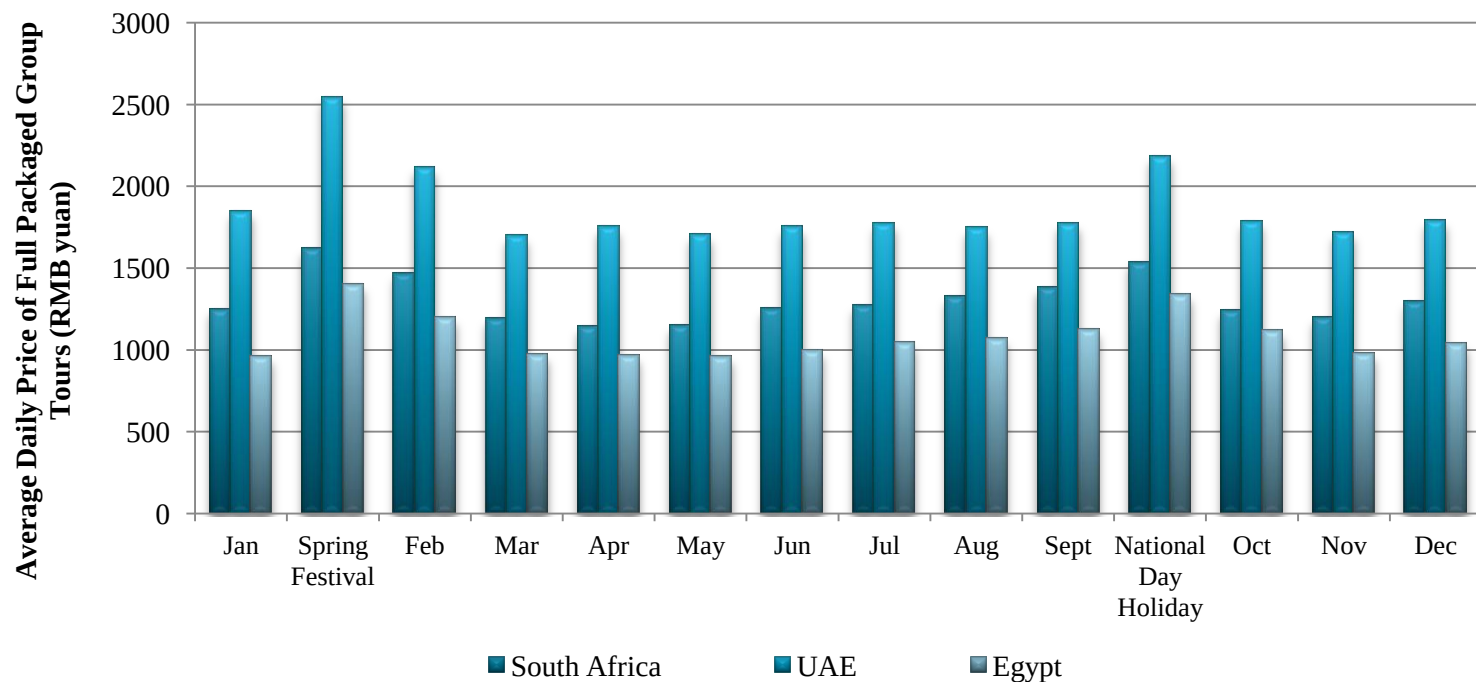
中东非洲主要目的地国家旅游价格指数 2016

China Outbound -Tourism Price Index of Major Middle East & African Countries



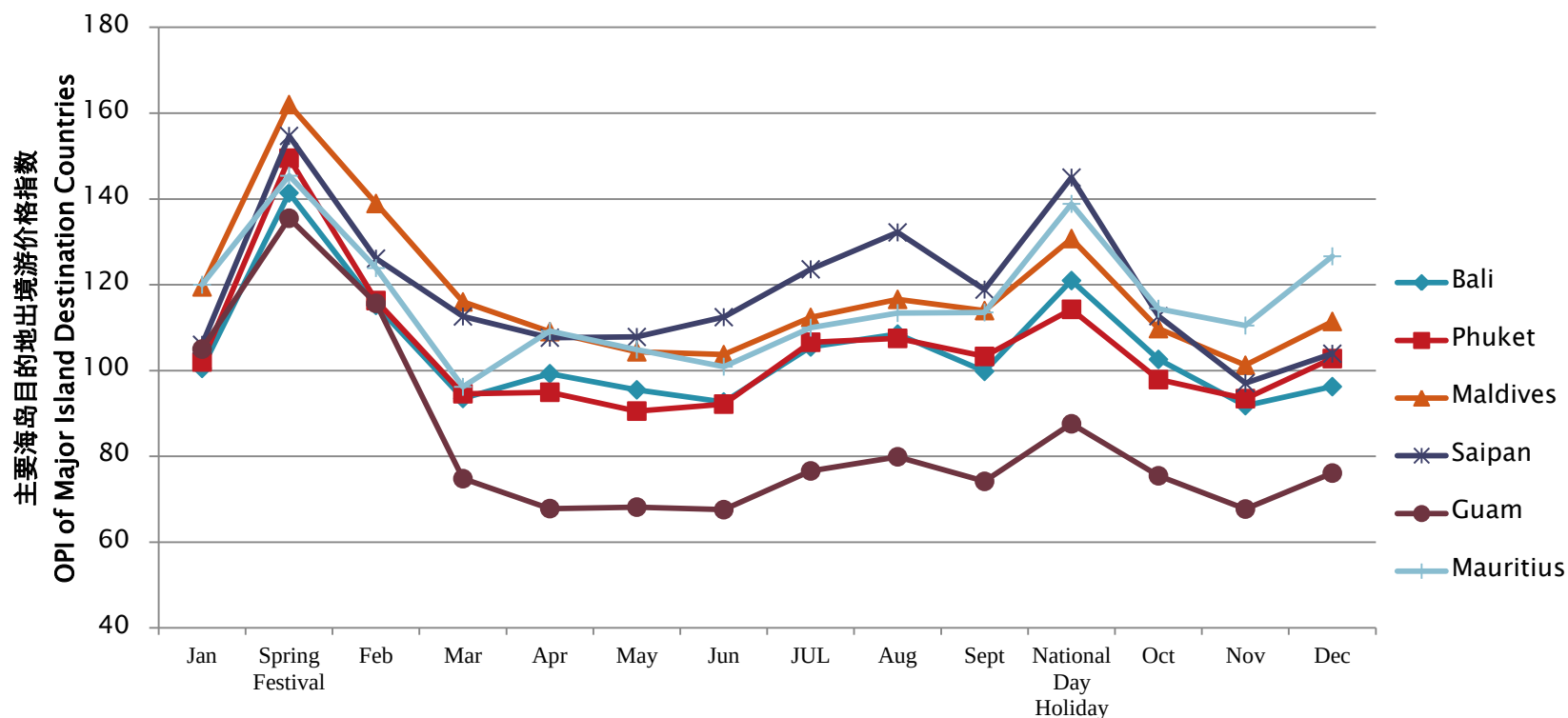
中东非洲主要目的地国家出境旅游产品日均价格 2016

Average Daily Price of Outbound Tour Products to Major Middle East & African Countries



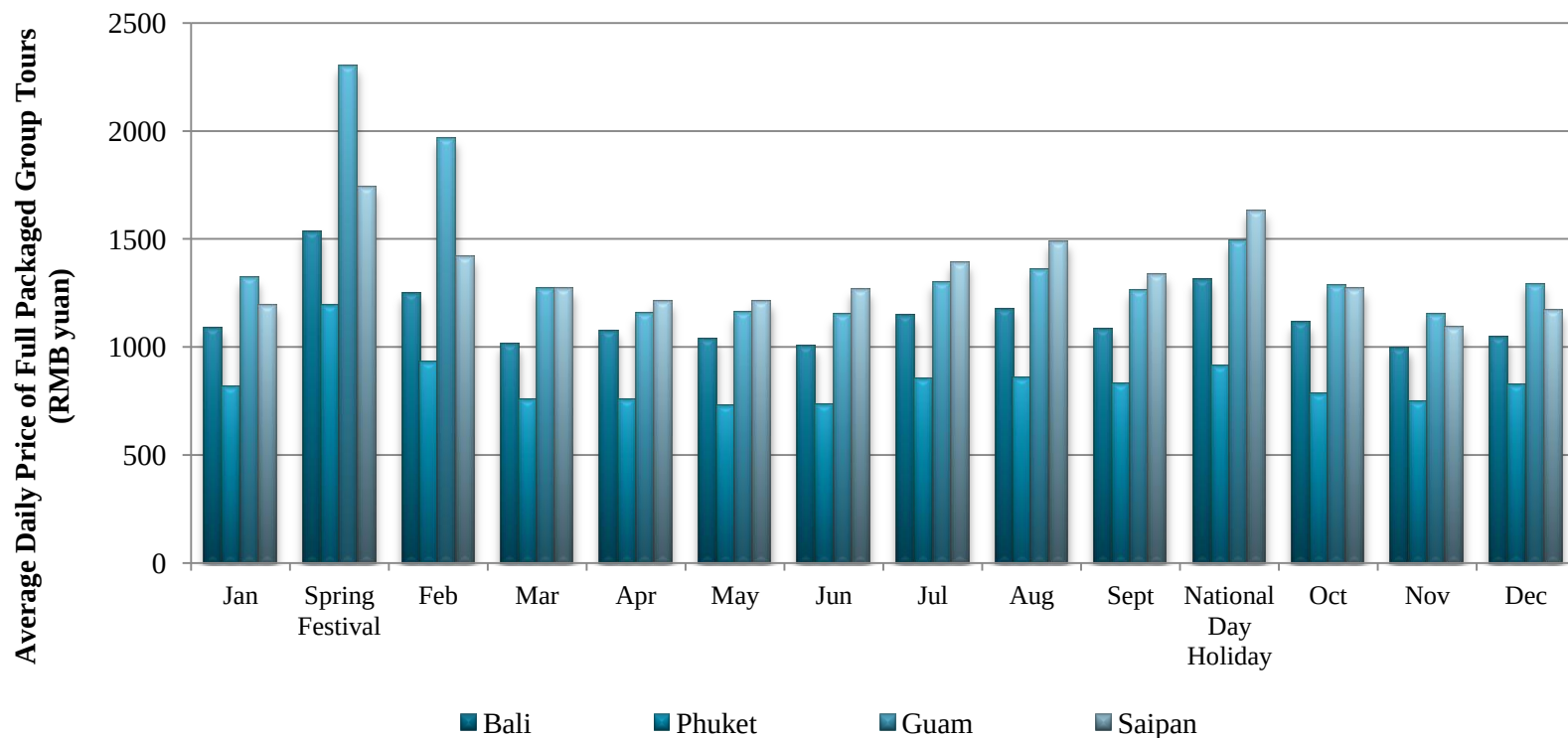
部分海岛目的地旅游价格指数 2016

China Outbound -Tourism Price Index of Major Island Destinations



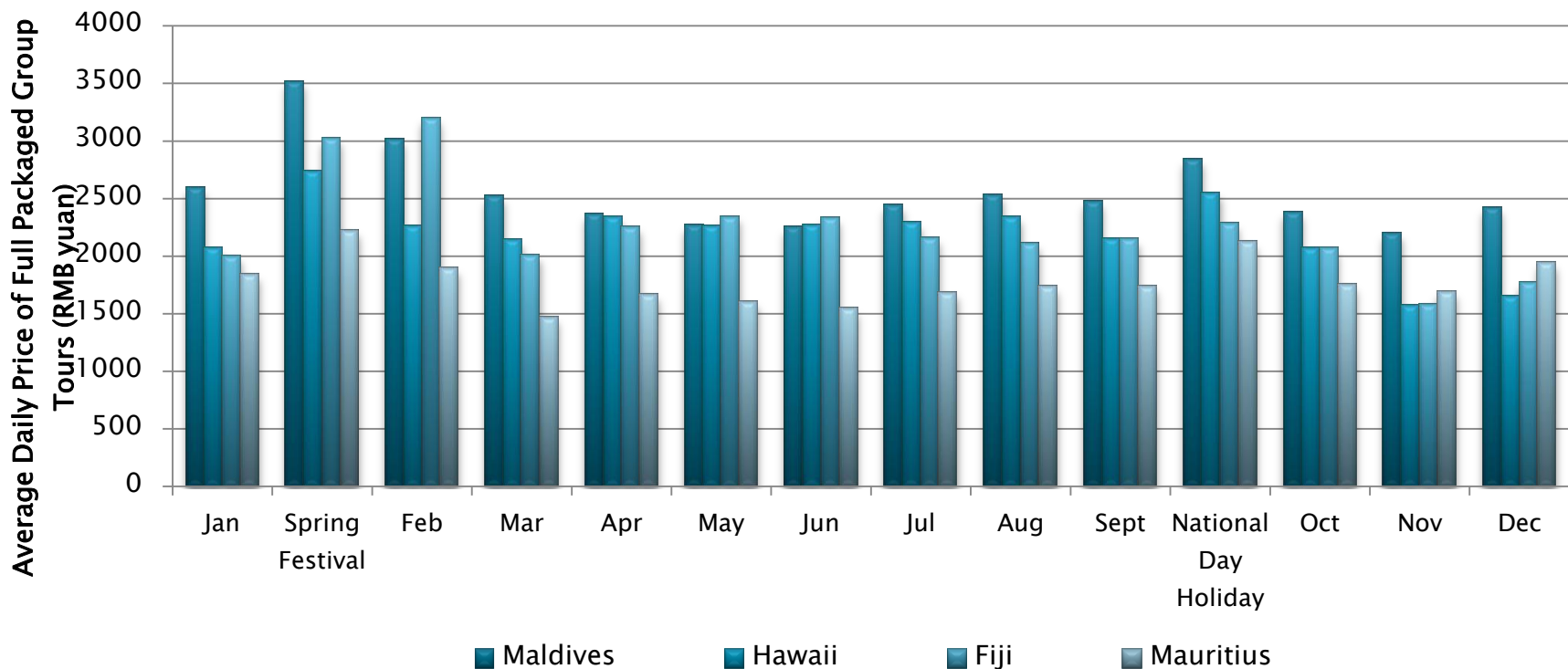
部分近程海岛目的地旅游产品日均价格

Average Daily Price of Outbound Tour Products to Major Short-haul Island Destinations



部分中远程海岛目的地旅游产品日均价格 2016

Average Daily Price of Outbound Tour Products to Major Mid to Long-haul Island Destinations



出境旅游价格指数报告 - 2017年春节黄金周专辑

OPI of 2017 Spring Festival Golden Week Holiday

出境旅游价格指数报告

CHINA OUTBOUND-TOURISM PRICE INDEX

2017年春节黄金周专辑

2017 Spring Festival Holiday Special Report



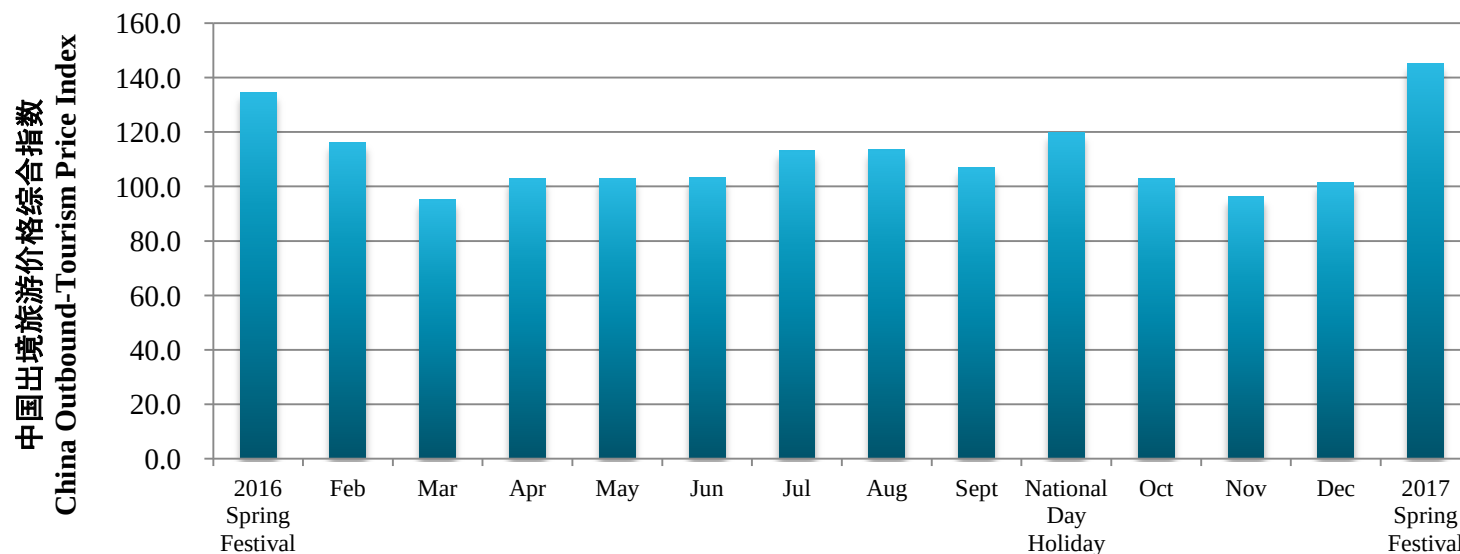
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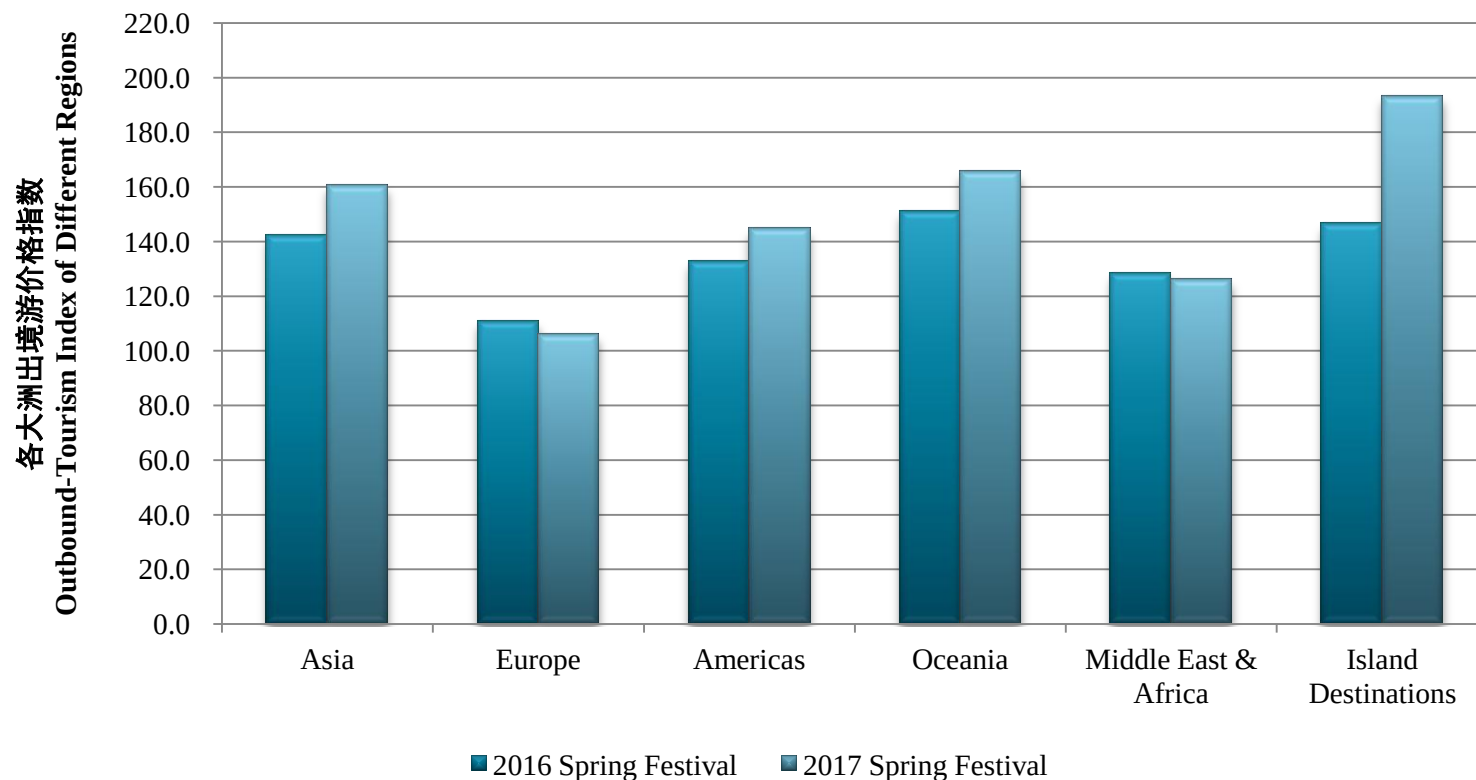
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2017春节黄金周各大洲旅游价格指数

OPI of Different Regions during Spring Festival Golden Week 2017



2017春节黄金周部分亚洲目的地国家旅游价格指数

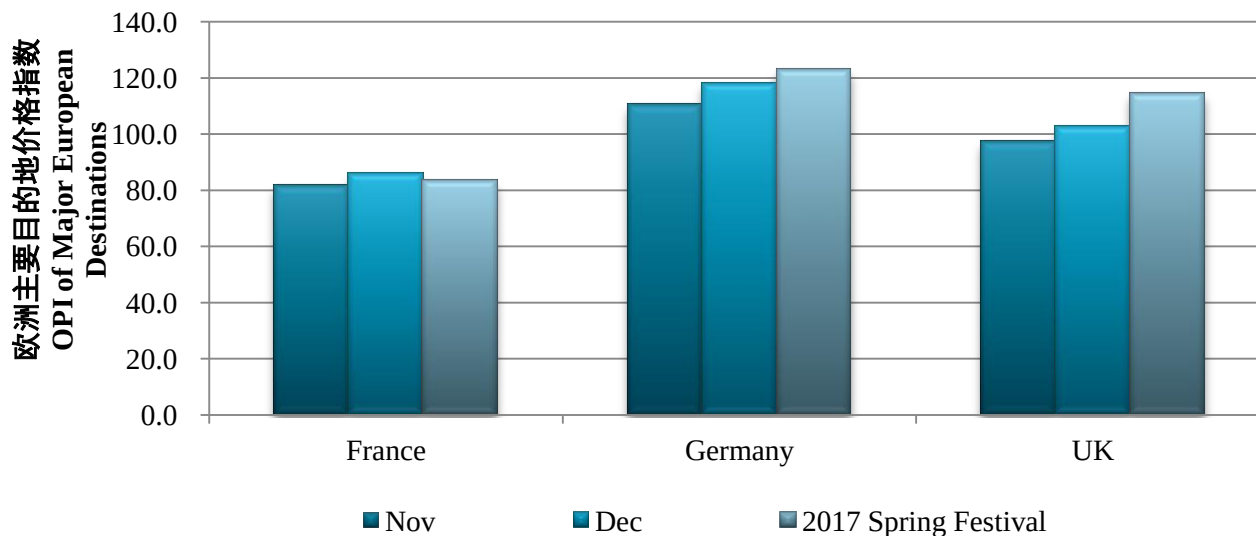
OPI of Major Asian Destination Countries during Spring Festival Golden Week Holiday 2017



Countries	Outbound Tourism Price Index of Full Packaged Group Tours to Asian Destinations		
	Price Index	Month over Month Growth Rate	Growth over Same Period of 2016
South Korea	134.6	35.4%	-1.1%
Japan	125.2	40.6%	-6.9%
Singapore	157.8	58.5%	-2.5%
Malaysia	164.6	57.3%	8.8%
Thailand	182.8	61.5%	17.1%

2017春节黄金周部分欧洲目的地国家旅游价格指数

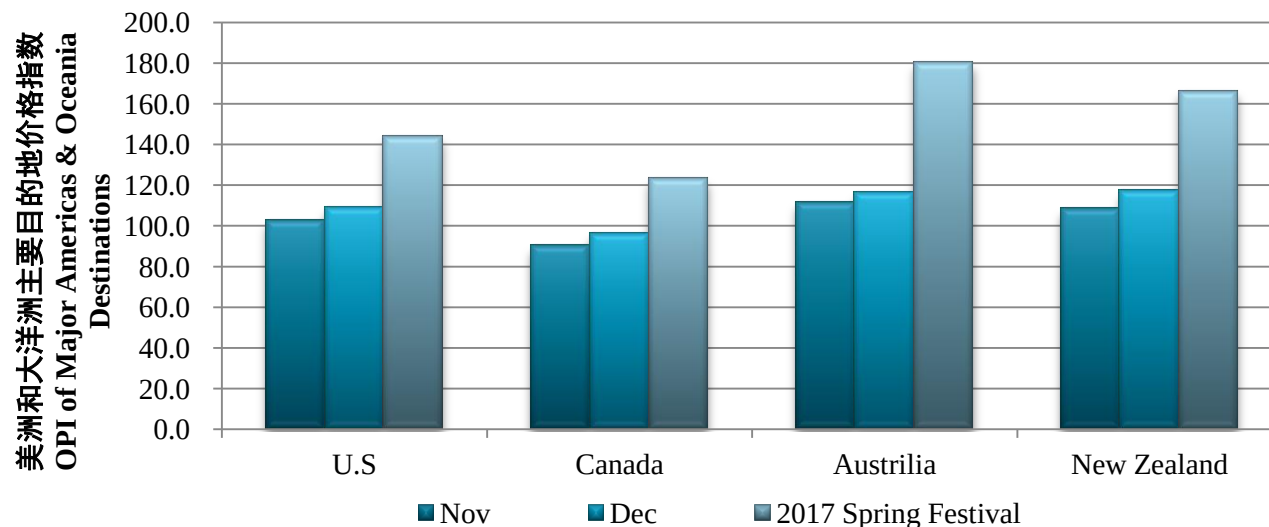
OPI of Major European Destination Countries during Spring Festival Golden Week Holiday 2017



Countries	Outbound Tourism Price Index of Full Packaged Group Tours to European Destinations		
	Price Index	Month over Month Growth Rate	Growth over Same Period of 2016
France	83.4	-3.0%	10.9%
Germany	123.1	4.3%	-2.9%
UK	114.6	11.8%	-3.4%

2017春节黄金周部分美洲和大洋洲目的地国家旅游价格指数

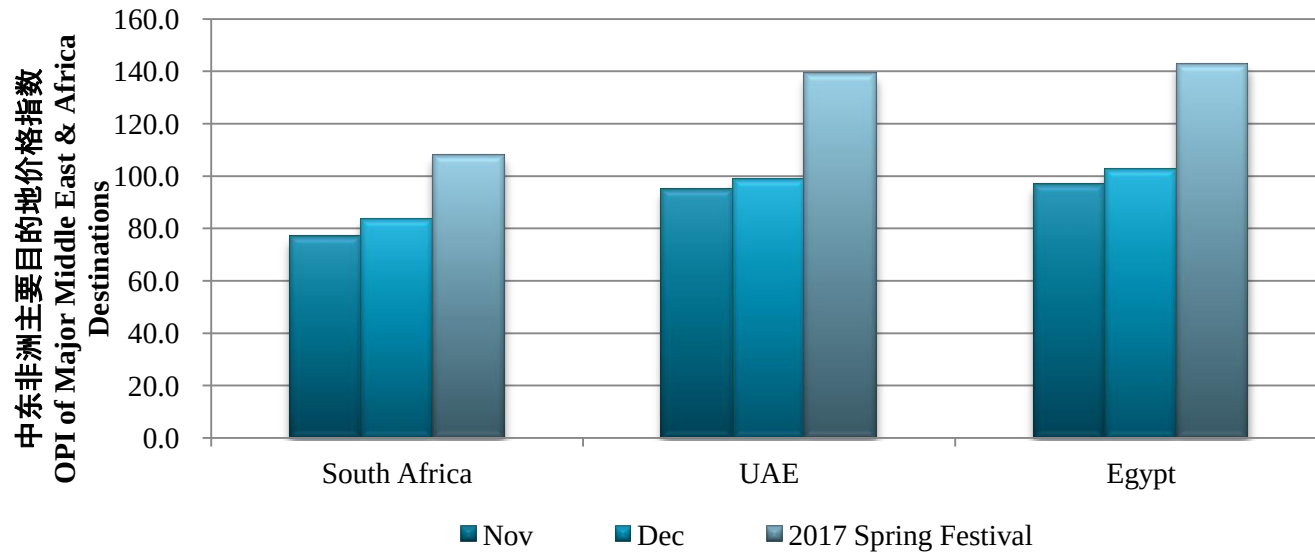
OPI of Major Americas & Oceania Destinations during Spring Festival Golden Week Holiday 2017



Countries	Outbound Tourism Price Index of Full Packaged Group Tours to Americas & Oceania Destinations		
	Price Index	Month over Month Growth Rate	Growth over Same Period of 2016
U.S.	144.3	32.2%	18.8%
Canada	123.5	28.2%	21.8%
Australia	180.3	55.0%	7.3%
New Zealand	166.4	42.0%	4.2%

2017春节黄金周部分中东非洲目的地国家旅游价格指数

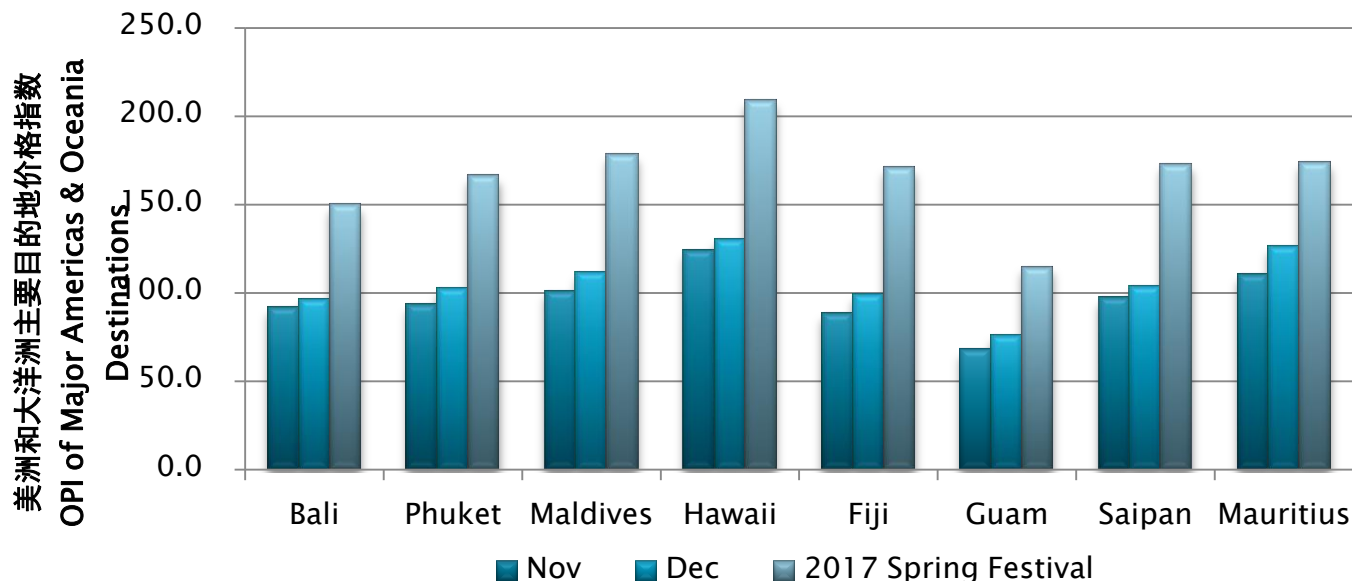
OPI of Major Africa & Middle East Destinations during Spring Festival Golden Week Holiday 2017



Countries	Outbound Tourism Price Index of Full Packaged Group Tours to Middle East & African Destinations		
	Price Index	Month over Month Growth Rate	Growth over Same Period of 2016
South Africa	108.0	29.6%	3.8%
UAE	139.1	40.6%	-1.1%
Egypt	142.8	39.1%	3.3%

2017春节黄金周部分海岛目的旅游价格指数

OPI of Major Island Destinations during Spring Festival Golden Week Holiday 2017

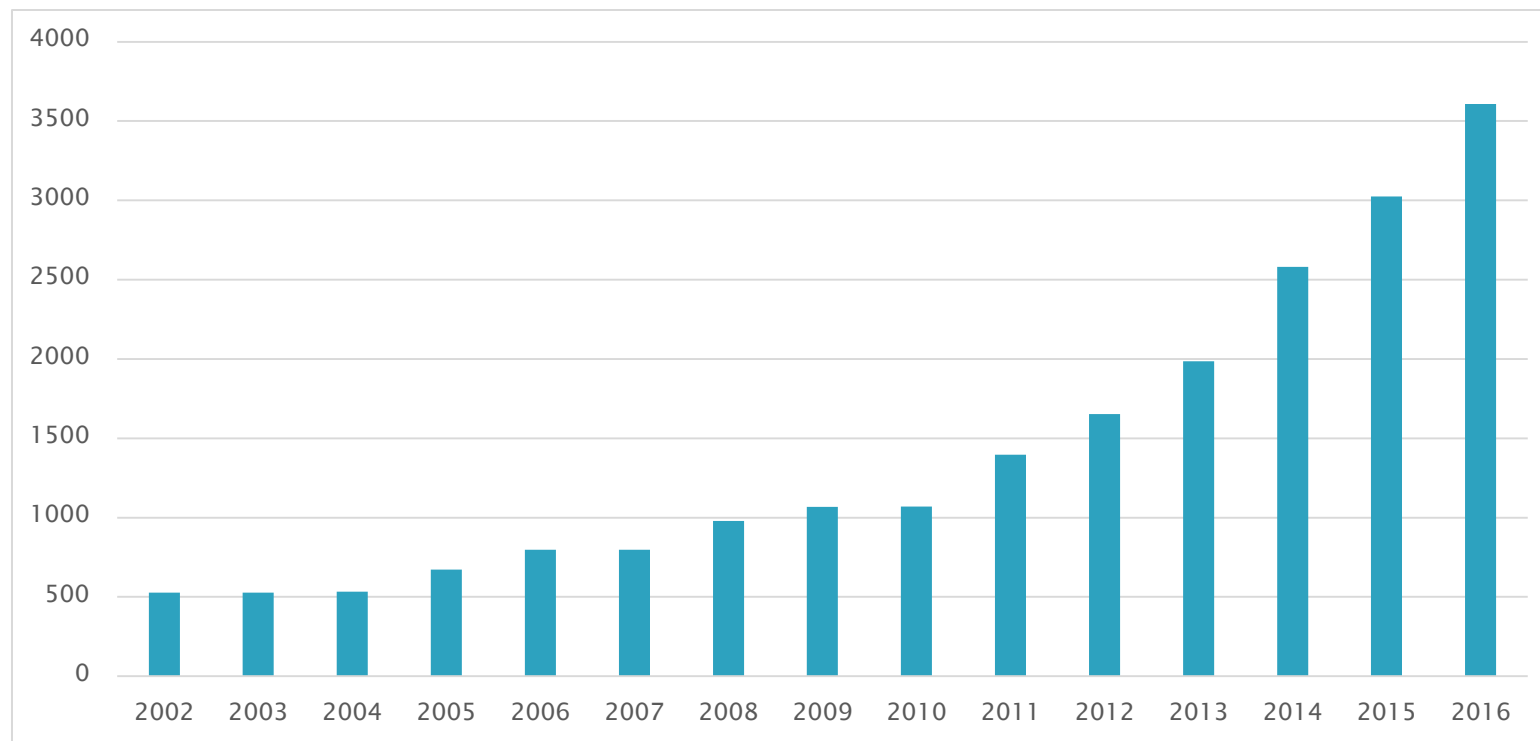


Island Destinations	Outbound Tourism Price Index of Full Packaged Group Tours to Island Destinations		
	Price Index	Month over Month Growth Rate	Growth over Same Period of 2016
Bali	149.9	55.7%	6.0%
Phuket	166.1	61.6%	11.1%
Guam	114.8	50.8%	-15.3%
Saipan	172.9	66.4%	11.8%

Island Destinations	Outbound Tourism Price Index of Full Packaged Group Tours to Island Destinations		
	Price Index	Month over Month Growth Rate	Growth over Same Period of 2016
Maldives	178.4	60.1%	10.2%
Hawaii	209.1	60.5%	-3.2%
Fiji	171.4	72.8%	1.4%
Mauritius	173.8	37.2%	19.5%

经营出境旅游旅行社数量

The Number of China Outbound Travel Agencies



中国出境旅游区域客源市场结构

Regional Structure of Outbound Tourist-generating Markets



2016-2017中国出境旅游市场

China Outbound Tourism 2016-2017

- ▶ 出境客流量高位平稳增长;

Chinese outbound travel will continue to grow steadily at current level;

- ▶ 游客消费需求升级, 优质供应商受青睐;

With the upgrade of Chinese tourist consumption, overseas quality tourism suppliers will be more and more welcomed;

- ▶ 出境旅游产品结构更趋多元化;

Outbound tour product structures are increasingly diversified with more personalized, customized, in-depth and theme tours;

- ▶ 出境旅游运营商业务重塑;

Outbound tour operators including OTA s are restructuring /remodeling business and product focuses;

2016-2017中国出境旅游市场

China Outbound Tourism 2016-2017

- ▶ 游客境外购物消费趋理性;

Chinese tourists overseas spending will continue to grow, but will become rational;

- ▶ 旅游目的地竞争愈加明显;

Competition among tourism destinations is becoming more and more fierce;

- ▶ 自由行市场进一步深度发展和不断外延;

FIT market will continue to grow rapidly and expand from the short-haul neighboring destinations to mid/long-haul destinations;

- ▶ 出境旅游业态更显多元化。

Chinese outbound tourism industry has become more diversified.

谢谢！
Thanks！



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