

# 《中国公民出境(城市)旅游消费市场调查报告(2014-2015)》分析

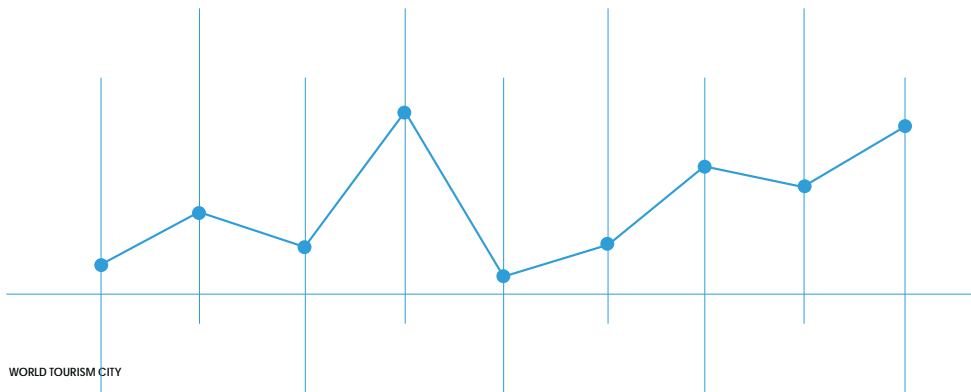
文 / 世界旅游城市联合会 益普索 图 / 全景 益普索

继2014年9月北京香山旅游峰会成功发布《2014年度中国公民出境(城市)旅游消费市场调查报告》后,2015年,世界旅游城市联合会再次委托世界三大市场研究机构之一的益普索,历时半年在中国全国范围内开展了此项调研和社会问卷调查,最终完成了《中国公民出境(城市)旅游消费市场调查报告2014-2015》。

## Market Research Report on Chinese Outbound Tourist (City) Consumption (2014-2015)

Words / World Tourism Cities Federation Ipsos Diagrams & Photos / Ipsos Quanjing

Following The Market Research Report on Chinese Outbound Tourist (City) Consumption in 2014 successfully released at Beijing Fragrant Mt. Tourism Summit 2014, the World Tourism Cities Federation (WTCF) decided to design a comprehensive new research with more items and questionnaire. It once again, entrusted Ipsos, one of the world's top three market research firms to conduct the research and questionnaire survey across China independently. Finally with the help from all parties, The Market Research Report on Chinese Outbound Tourist (City) Consumption in 2015 is successfully completed.



本次调查通过各种合作渠道途径以及互联网和微博、微信等手段,实施了对中国出境游客的定量问卷调查,经过完整性、有效性的筛选,最终确定7,813份有效问卷。

### 本次调查与2014年调查相比突出了以下特点:

一、关注情感因素对中国出境游客旅游决策和行为的影响。调查显示,情感因素越来越影响着旅游消费者的行为和态度,这种情感影响来自“他人传播”和“自身体验”。

二、增加对地中海旅游和非洲旅游等新兴旅游目的地的专项调查。

为更好地体现市场类别和地域特色,为当地旅游城市和机构更好地了解中国游客,在调查问卷中增加对地中海旅游和非洲旅游市场的关注。

三、增添中国游客在出境旅游时对相关旅游机构和品牌品质的关注。除了了解中国出境游客在境外旅游城市的旅游特点和消费行为外,还了解游客在旅游过程中对旅游供应商的意愿及偏好。

四、增添对文明旅游、理性旅游消费的关注。本次调查中增加了相关的栏

目,对尊重各国文化传统和资源、尊重服务、赢取友谊、互相敬重,对加深认识中国颁布的《旅游法》,如何采取合理和友善态度对待不满意等,进行了必要的关注。

世界旅游城市联合会希望本次调查能够及时帮助会员城市和机构会员把握这种动态化的新常态,发扬“旅游让城市生活更美好”的宗旨,满足会员对联会的期待,打造联合会的国际影响力而更好服务于全球旅游业的繁荣与发展。

### 一、中国出境游客群体特征 他们来自哪里

作为中国出境游客的传统输出大省(市),北京、上海和广东依然是2014至2015年期间输出出境游客最多的省(市)。其次为天津、江苏、浙江和辽宁等沿海省(市),四川也为较大的出境游客输出省份。

#### 他们最想去哪里

调查显示,2014至2015年期间,中国出境游客的足迹遍布世界各个角落。亚洲城市依然是中国出境游客选择最多的旅游目的地(77.67%),其次为欧洲城市(32.07%)和美洲城市(20.29%)。

短线旅游中,日韩和东南亚城市最热门。过去一年,中国出境游客短线旅游中选择最多的10个城市为:首尔、曼谷、东京、大阪、名古屋、济州岛、新加坡、仁川、神户和奈良。

长线旅游中,欧洲、美国、澳大利亚“三分天下”。过去一年,中国出境游客长线旅游中选择最多的10个城市为:巴黎、伦敦、悉尼、洛杉矶、罗马、纽约、华盛顿、旧金山、墨尔本和威尼斯。中国出境游客再次境外旅游时,短线旅游中,首尔、东京和马尔代夫最为热门;长线旅游中,伦敦、巴黎和悉尼最为热门。

#### 他们具有哪些人文特征

80后和70后已经成为中国出境游客的主体,占比达到70.61%。这部分人群学历较高,多数已婚并有未成年孩子,带领未成年孩子出境旅游以开拓视野、陪同父母出境旅游以享天伦之乐的特征相较于2013至2014年更为明显。

50后、60后,占比达到18.01%,作为财力和闲暇时间均较为充裕的人群,同样值得关注。以60岁以上中国出境游客为例,每年安排多次出境旅游的比例达到48.83%,远高于其他年龄段游客。

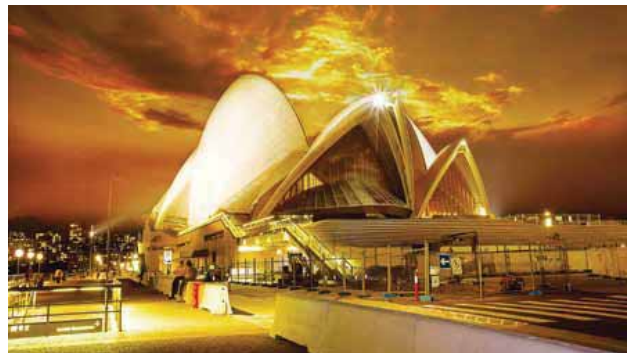
从性别上看,女性游客多于男性游客。

中国出境游客普遍为收入较高群体。个人平均月收入约为12,224元,家庭平均月收入约为21,615元。个人月收入是2014年城镇居民人均每月可支配收入(2,417元)的5倍。

#### 他们具有哪些旅游特征

调查显示,中国游客一旦踏出国门前往境外旅游,脚步便不会停止。中国游客境外旅游经历丰富,平均有4.8次境外旅游经历。其中37.17%的中国游客每年至少安排一次出境旅游,每年安排多次出境旅游的比例达到36.86%。

春节假期、国庆假期、暑假是中国出





境游客选择最多的出行时间，在上述时间出行人数约占全年出境人数的 65.57%。随着带薪休假的日益普及，选择非假期时间出行的游客也将越来越多。这部分游客，相较于选择假期出游的游客，80 后更多，单身或已婚没有小孩更多，收入低于整体（家庭平均月收入为 18,375 元，个人平均月收入为 10,155 元）。

各类旅游形式满足不同游客的需求，参团游与自由行是中国出境游客选择最多的两种旅游形式，相较于 2013 至 2014 年，选择参团游的比例下降较为明显（下降 3.5 个百分点）。

随着境外旅游经历的增加，中国出境游客对旅游的个性化与差异化的要求逐步提高。2014 至 2015 年，1.57% 的游客选择“定制旅游”，由旅游机构依据其特定需求量身打造旅游行程和节目安排。相对而言，选择长线旅游的游客这一需求更为明显。中国游客在境外旅游时，不包含往返路程，行程多在 6 天左右。选择短线旅游的游客行程多在 3 至 5 天，选择长线旅游的游客行程多在 8 至 10 天或 10 天以上。

包括旅行团其他团员，中国游客境外旅游的同行人数平均约为 10 人。中

国出境游客喜欢与家人（67.14%）同行，其次为朋友（44.08%）。特别是 60 岁以上的中国游客，与家人出游的比例达到 80.56%。

包含各种花费，选择参团游的中国出境游客人均花费约为 17,402 元，其中短线旅游游客人均花费约为 11,864 元、长线旅游游客人均花费约为 22,691 元。选择自由行的游客人均花费约为 25,103 元。

境外花费主要用于购物。65.31% 的游客表示在境外花费最多的方面为购物，这一比例相较于 2013 至 2014 年增加 7.55 个百分点。

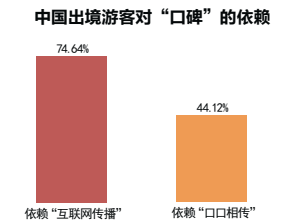
## 二、情感因素对中国出境游客旅游决策及行为的影响

情感因素与市场营销有着密切的联系，为此本次调查增加了相应调查内容。调查显示，情感因素影响中国出境游客的旅游决策和旅游行为，这种情感影响一方面来自“他人”，另一方面来自“自身”。“他人”的影响体现在“传播”，而自身的影响则体现在“体验”。良好的体验和旅游归来后的意犹未尽是中国游客再次出境旅游的最大推动力，也是他们

互相推荐传播和建立口碑的原动力。

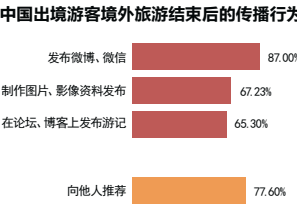
### 来自他人的传播

“口碑”在中国出境游客选择境外旅游城市过程中起着十分重要的作用。他们在境外旅游前，74.64% 的会加入相关微信群、QQ 群和论坛获取相关旅游信息，44.12% 的会向亲朋好友咨询。



“传播”已成为中国出境游客结束境外旅游后的常态行为，随着互联网、特别是移动互联网在中国出境游客中的极大普及（分别有 90.52% 和 84.40% 的游客通过电脑、移动设备使用互联网），传播形式也愈加多样。

微信、微博等移动互联网媒体已成为中国游客传播旅游信息的最主要途径，其次为向他人的“口头推荐”。游记和博客也是推荐、传播旅游目的地必不可少的方式。



### 来自自身的体验

旅游体验的满意与否决定着中国出境游客对境外旅游城市的重游意愿，也决定着其传播的调性和力度。好的体验会带来较高的重游，也会产生正面积极

的传播，反之则会产生负面消极的传播。

据调查，愉悦游客中（满意度评价为 9 至 10 分），重游意愿为“肯定会”的比例是 68.55%，满意游客中（满意度评价为 8 分）这一比例下降至 43.12%，而不满意游客中（满意度评价为 1 至 7 分）这一比例仅为 26.52%。

愉悦游客中，推荐意愿为“肯定会”的比例是 83.02%，满意游客中这一比例下降至 58.22%，而不满意游客中这一比例仅为 41.80%。

## 三、境外旅游城市如何吸引中国出境游客

境外旅游城市可通过以下举措吸引中国出境游客：

### 改善签证政策

降低签证门槛、简化签证程序、缩短签证审批时间，依然是中国出境游客最为

期望的签证政策改善方式。随着中国各省、区、市游客的出境旅游需求与日俱增，所在省市没有使领馆的中国游客希望可以提供邮寄或委托代办签证服务。

### 开辟特色旅游线路

在特色旅游线路开辟上，中国出境游客希望开辟专门的购物旅游线路、美食旅游线路和具有当地文化特色的深度探秘旅游线路。随着中国境外旅游真人秀节目的风行，除依托热门影视剧外，也可根据真人秀节目开辟特色旅游线路。

### 开展针对性的营销活动

借助在中国的国际旅展、旅交会，开展旅游讲座和大规模公众化的宣传推广活动，是最能吸引中国游客的营销活动。其次为开展季节性的优惠促销活动。

### 开通直飞航班、邮轮、包机或火车

46.14% 的中国出境游客表示开通直飞航班、邮轮、包机或火车会吸引他

们出境旅游。

### 提高商品退税比例或折扣比例

43.99% 的中国出境游客表示提高商品退税比例或折扣比例会吸引他们出境旅游。

## 四、境外旅游城市如何提升中国出境游客体验

### 信息查询

超过一半的中国出境游客在出发前会查询与境外旅游城市相关的景点、餐饮、住宿和购物信息。在查询时，多以城市名称和景点名称为搜索关键词。提高可查询信息的丰富性，依然是中国出境游客在信息查询体验上的最大期望。

### 签证办理

十年内或五年内可多次往返的长期有效签证是中国出境游客的最大期望，可以促成中国游客有计划地再次前往旅





游目的地深度旅游。

餐饮

具有境外旅游城市当地特色的风味餐饮是中国出境游客选择最多的餐饮类型，特别是在日韩城市、东南亚城市和非洲城市。在欧美城市则更多选择西餐。提供中文菜单是中国出境游客在餐饮体验上的最大期望，其次是提高中餐馆的口味和提供中文服务协助。

住宿

中国出境游客对高档酒店的消费意愿首次超越中档酒店，高档酒店成为 2014 至 2015 年中国出境游客选择最多的酒店类型。酒店增加中文标识（或国际通用的图形标识）、提供中文服务协助，是中国出境游客在住宿体验上的最大期望。

交通出行

大巴是中国出境游客、特别是选择参团游客的最主要交通出行方式。其他旅游形式的游客更多选择出租车、地铁和公交车出行。选择私人定制的游客，更多选择租车。公共交通工具增加中文标识（或国际通用的图形标识）依然是中国出境游客在交通出行体验上的最大期望。



游览

自然风光是中国出境游客游览时选择最多的景点类型，其次为历史遗迹。增加中文标识（或国际通用的图形标识）依然是中国出境游客在游览体验上的最大期望。

购物

购物已是中国游客在境外旅游时的必选“项目”。免税品店是中国出境游客选择最多的购物场所，其次为大型百货商场和购物中心。特色纪念品是中国出境游客购买最多的商品，其次为化妆品。此外，日用品、奢侈品和服饰购买也较多。中国出境游客用于购物的花费平均为 10,130 元。

相较于 2013 至 2014 年，增加中文标识（或国际通用的图形标识）和配置中文导购依然是中国出境游客在购物体验上的最大期望。缺少中文标识的情况下，中文导购对于协助中国游客购物、提升购物体验作用十分明显。

娱乐

超过 80% 的中国游客在境外旅游时会选择娱乐项目，特别是男性游客、年龄在 45 岁以下的游客、月收入在



15,000 元以上的游客。晚会 / 风情园是中国出境游客选择最多的娱乐场所，其次为酒吧 / 夜店、剧场 / 剧院。增加娱乐场所的中文标识（或国际通用的图形标识）和提供中文服务协助，是中国出境游客在娱乐体验上的最大期望。

五、中国出境游客对旅游供应商的选择习惯

保险公司

调查显示，绝大多数（88.90%）中国出境游客认同并接受旅游保险产品，主要出于防范旅游过程中的各类风险。中国出境游客多通过旅行社或旅游网站购买中资保险公司承保的保险产品，产品类型多为旅行社责任险。

旅行社

2014 至 2015 年期间，86.10% 的中国游客在出境旅游时会选择旅行社提供的参团游、自由行等各类产品。旅行社官网是中国游客选择最多的旅行团预订渠道，其次为营业部门市。超过 85% 的中国游客未来出境旅游时，仍会选择旅行社提供的各类旅游产品。其中，自由行（含半自由行）类产品需求最大，



其次为参团游产品。

超过 64% 的中国游客在境外旅游时会选择自费项目，旅行社可根据游客类型提供差异化的自费项目选择。

旅游网站

越来越多的中国出境游客，特别是选择自由行和自助游的游客，在出境旅游过程中借助于旅游网站。通过旅游网站查询相关信息、预订住宿和机票的比例均超过 50%。

支付机构

Visa 信用卡、现金、银联卡和万事达卡是中国游客在境外支付时选择最多的方式。调查显示，银联卡是中国游客国内日常消费时最常使用的银行卡，也是在境外消费时最愿意选择的支付方式，但受限于境外部分场所不支持银联卡刷卡结算，在一定程度上抑制了中国游客的消费。

邮轮公司

调查显示，东南亚和东北亚等中国周边邮轮游是中国出境游客在过去一年选择最多的邮轮旅游类型。远距离邮轮游中，中国游客选择地中海邮轮航线和加勒比海邮轮航线逐渐增多。未来，中

地区旅游经历，这部分游客一般多在 4 次或第 5 次境外旅游时选择前往地中海地区。多数中国出境游客前往地中海地区旅游，会优先选择中部地区，即意大利、希腊、爱琴海等南欧地区。

旅游观光是中国出境游客选择地中海地区旅游的首要目的，其次为休闲度假。人文特色和自然景观最吸引他们。改善签证办理政策和开辟特色旅游线路最能吸引中国出境游客前往地中海旅游。

非洲旅游

调查显示，在 2014 至 2015 年期间，仅有 4.37% 的受访者前往非洲城市旅游，在各大洲中吸引中国游客数量最少。旅游观光是中国出境游客选择非洲城市旅游的首要目的，其次为休闲度假。相较于整体，因为特殊兴趣前往非洲的游客更多。自然景观和人文特色最吸引他们。改善签证办理政策、开展专门宣传推广活动和开通直飞航班最能吸引中国出境游客前往非洲城市旅游。

六、专项调查

地中海旅游

42.79% 的中国出境游客有地中海



The scope of the research has been increased in terms of width ever, and even through various ways and channels of cooperation, the Internet and microblogging, WeChat and other means. The quantitative questionnaire survey is carried out through Chinese outbound tourists, and by means of the integrity and effectiveness screening, ultimately 7,813 valid questionnaires are determined.

#### Compared with the research in 2014, this research specially highlights the following characteristics:

I. Focus on impact of emotional factors to the Chinese outbound tourists in terms of travel decisions. The research shows that emotional factors are influenced by "communication" and "personal experience".

II. It adds the new researches on the Mediterranean, African and other emerging tourist destinations.

In order to better reflect the market segments and geographical characteristics and to better help the tourist cities and operators to understand Chinese tourists, the survey adds new researches on the Mediterranean and African tourist destinations.



III. It investigates the concern of Chinese tourists to the relevant of travel agencies and brands for their travel abroad. It also investigates the preferences of Chinese tourists regarding to tourism service providers.

IV. It adds the researches on the customer civilization. The relevant items shows that the sense of respect to the tourism resources, the friendly behaviors, in-depth understanding of laws and appreciation attitudes have received general recognition.

WTCF hopes the research by the all efforts will be able to boost the sound development of Chinese outbound tourism and carry forward further its core concept "Better City Life Through Tourism". The outstanding orientation of WTCF is to promote the exchange and cooperation between member cities for the effective operation and business prosperity.

#### I. Group Characteristics of Chinese Outbound Tourists

##### Where are they from?

As the traditional larger tourist source provinces (municipalities) of Chinese outbound tourists, Beijing, Shanghai and Guangdong generated the biggest

number of Chinese outbound tourists in the year 2014–2015. Following them are the coastal provinces (municipalities), such as Tianjin, Jiangsu, Zhejiang and Liaoning, and Sichuan is also a province having the larger number of outbound tourists at home.

##### What are their desired destinations?

According to the survey, Chinese outbound tourists reached every corner of the world in the year 2014–2015. Asian cities are still the destinations chosen by the largest number of Chinese outbound tourists (77.67%), followed by European cities (32.07%) and then American cities (20.29%).

In terms of short-distance travel, the cities in Japan, South Korea and Southeast Asia are most popular with Chinese tourists. Over the past year in short-range travel, Chinese outbound tourists have chosen the top 10 target cities are: Seoul, Bangkok, Tokyo, Osaka, Nagoya, Jeju Island, Singapore, Incheon, Kobe and Nara.

The most popular three regions of long-distance travel are Europe, the United States, and Australia. Over the past year in long-range travel, Chinese outbound tourists have chosen the top 10 target cities: Paris, London, Sydney, Los Angeles, Rome, New York, Washington, San Francisco, Melbourne and Venice.

As for Chinese outbound tourists, when they travel abroad again, Seoul, Tokyo and the Maldives are the most popular in the short-range tourism; while London, Paris and Sydney are the most popular in long-range travel.

##### What are their humanistic characteristics?

Those born in 1980s and 1970s have become the main part of China's outbound tourists, accounting for 70.61% of the total. They receive higher education, and most of them are married and have minor children. In terms of outbound tourism, they go out with their minor children to broaden their horizons, and travel with their parents to enjoy their family union happiness. These characteristics are more apparent



compared with those in 2013–2014.

Those people born in 1950s and 1960s account for 18.01%, and as a group of the people with good financial resources and abundant leisure time, they deserve the attention. For example, of Chinese outbound tourists aged over 60, those making several outbound travel arrangements each year account for 48.83%, far higher than any other age groups of tourists.

From a gender perspective, female tourists are outnumbered than males.

Chinese outbound tourists are generally higher income groups of people. The average monthly income is about 12,224 yuan for each person and about 21,615 yuan for each household. The personal average monthly income is five times the monthly disposable income of urban residents per capita of 2014 (2,417 yuan).

##### What are their travel characteristics?

The survey shows that Chinese tourists won't stop once they set foot in a foreign land for the travel purpose. Chinese tourists have a rich experience in traveling abroad, with 4.8 overseas trips on average. Chinese tourists traveling abroad at least once a year account for 37.17% while those traveling abroad several times a year make up 36.86%.

In most cases, Chinese outbound tourists choose to travel abroad during the Chinese Spring Festival holiday, the National Day holiday and summer holiday, accounting for 65.57% of the total annual Chinese outbound tourists.

With the increasing popularity of paid vacations, more and more tourists will choose non-holiday days to travel abroad. Compared to the tourists choosing to travel abroad in holidays, a large part of these tourists are born in 1980s, single or married with no children, and their income is below the overall income level (the household average monthly income is 18,375 yuan while the personal average monthly income is 10,155 yuan).

Different forms of tourism meet the needs of various tourists, and group travel and independent travel are the most popular two forms of tourism with Chinese outbound tourists. However, compared with that of the year 2013–2014, there is a more significant decline (3.5%) in the proportion of the tourists selecting guided group travel.

With the increase in overseas travel experiences, Chinese outbound tourists call for a gradual increase in travel personalization and differentiation. In

2014–2015, 1.57% of the tourists chose "customized travel" which is a tourism itinerary and program arrangement tailored by a travel agency according to tourists' specific needs. Relatively speaking, there is a more apparent demand for this on the part of long-distance tourists.

Chinese tourists often take about six days to travel abroad, excluding the days for round trips. Most short-distance outbound tourists travel 3–5 days while long-distance tourists travel 8–10 days or more than 10 days.

With other members of tour groups calculated in the survey, the average number of Chinese outbound tourists traveling together is about 10 people. Chinese outbound tourists prefer to travel together with family members (67.14%) and then with friends (44.08%). Especially Chinese tourists over the age of 60 tend to travel with their families, accounting for 80.56%.

A variety of travel expenses are calculated in this survey. For Chinese outbound tourists who select package travel, their average spending is about 17,402 yuan, of which short-distance travelers' average spending is about 11,864 yuan while long-distance tourists' average spending is about 22,691 yuan. For Chinese outbound tourists who select independent travel, their average spending is about 25,103 yuan.

Overseas spending is mainly used for shopping. 65.31% of the tourists express that their biggest overseas spending is used for shopping, which increased 7.55% comparing to the year 2013–2014.

#### II. Impact of Emotional Factors on Chinese outbound tourists in terms of Travel Decisions and Behaviors

Emotional Factors and marketing are closely linked, and for this reason the corresponding survey items are added to the survey. The survey reveals that emotional factors influence travel decisions and behaviors of Chinese outbound tourists, and on the one hand

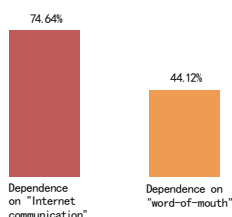


the emotional impact comes from the “others,” and on the other hand it also derives from “self.” The influence of “others” is embodied in the “communication,” while the influence of “self” is reflected in the “experience.” Nice experience and longing for another travel after returning are the biggest drivers of Chinese outbound tourists traveling abroad again, but are also the prime power for their mutual recommendations and building word-of-mouth referrals.

#### From others' communication

“Word-of-mouth” plays an important role in helping Chinese tourists choose overseas tourism cities. Before they travel abroad, 74.64% of them tend to obtain relevant travel information by joining in relevant WeChat groups, QQ group and BBS while 44.12% seek advice from friends and relatives.

Figure 2 Reliance of Chinese Outbound Tourists on “Word-of-Mouth”

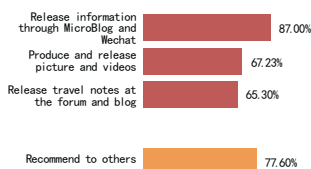


“Communication” has become the norm behavior of Chinese outbound tourists after returning from traveling abroad, and with the great popularity of the Internet, especially the mobile Internet among Chinese outbound tourists (90.52% and 84.40% of the tourists surf the internet through computers or mobile devices respectively) the forms of communication have become even more diverse.

WeChat, MicroBlog and other mobile Internet media have become the main channels for Chinese tourists to disseminate travel information,

followed by “oral recommendation” to others. Travel notes and blogs are also necessary approaches to recommend and spread the information of tourism destinations.

Figure 3 Communication Behaviors of Chinese Outbound Tourists after Returning Home from Traveling Abroad



#### From their own experience

Whether Chinese outbound tourists are satisfied with travel experience determines their revisit willingness and the attitude and intensity of their communication. Good experience will bring higher revisit ratio, and will generate positive and active communication, otherwise it will produce negative and passive communication.

In terms of revisit willingness, the tourists with “definite” revisit willingness account for 68.55% of pleasant tourists (satisfaction rating of 9–10

scores), 43.12% of satisfactory tourists (satisfaction rating of 8 scores) and just 26.52% of dissatisfactory tourists (satisfaction rating of 1–7 scores).

In terms of recommendation willingness, the tourists with “definite” recommendation willingness account for 83.02% of pleasant tourists, 58.22% of satisfactory tourists and just 41.80% of dissatisfactory tourists.

### III. Methods used by Foreign Tourist Cities to Attract Chinese Outbound Tourists

Overseas tourism cities may attract Chinese outbound tourists by taking the following measures:

#### Improve the visa policy.

In terms of improvement of visa policy, what Chinese outbound tourists expect most is to reduce visa barriers, simplify visa procedures and shorten the visa processing days.

With the increasing demand for outbound tourism in Chinese provinces, autonomous regions and municipalities, Chinese tourists hope that visa processing services can be provided on a commission or by mail at those cities where there is no embassy or consulate.

#### Break special tourism routes.

In terms of exploring special tourism routes, Chinese outbound tourists hope

that special shopping tourism routes, nice food tourism routes and in-depth exploration tourism routes with local cultural characteristics can be opened up.

Due to the popularity of Chinese outbound travel reality shows, they are also utilized to open up special tourism routes, in addition to the popular movies and TV plays.

#### Carry out targeted marketing campaign.

Travel lectures and large-scale public-oriented promotion activities carried out at international travel shows and travel fairs in China, are the best marketing campaigns to attract Chinese tourists. Following them are seasonal promotion activities.

#### Open up non-stop flights, passenger liners, chartered planes or trains.

46.14% of Chinese outbound tourists said that Opening non-stop flights, passenger liners, chartered planes or trains will attract them.

#### Increase the tax refund ratio or discount ratio of goods.

43.99% of Chinese outbound tourists express that an increase in the Tax rebate proportion or discount ratio of goods will attract them to travel abroad.

### IV. Methods used by Foreign Tourist Cities to Improve the Experience of Chinese Outbound Tourists

#### The whole overseas travel process —— Information inquiry

More than half of Chinese outbound tourists tend to inquire the information on attractions, restaurants, lodging and shopping in related tourism cities prior to their departure. In time of such query, they often use the names of such cities or attractions as search keywords.

Improving the richness of available information is still the biggest expectation of Chinese outbound tourists in terms of the information inquiry experience.

#### The whole overseas travel process —— Visa Handling

What Chinese outbound tourists expect most in terms of visa processing is that there is a valid long-term multiple-



entry visa within ten years or five years, which can contribute to planned in-depth travels of Chinese tourists to tourist destinations for several times.

#### The whole overseas travel process —— Catering

Most Chinese tourists prefer foods and beverages with local characteristics and styles in overseas tourism cities, especially when they travel to tourism cities in Japan, South Korea, Southeast Asia and Africa. And, most Chinese tourists prefer Western-style food when they travel to tourism cities in Europe and America.

What Chinese outbound tourists expect most in terms of dining experience is that Chinese-version menus can be offered at restaurants in such tourism cities; secondly, the tastes of Chinese restaurants can be improved and some services or help can be provided in Chinese.

#### The whole overseas travel process —— Lodging

Chinese outbound tourists willing to spend a night at high-end hotels are more than the counterparts willing to stay at mid-range hotels for a night for the first time. Thus high-end hotels have become the most hotel type chosen by Chinese tourists in 2014–2015.

What Chinese outbound tourists expect most in terms of lodging experience is that hotels can increase Chinese-using signs (or internationally-used graphic logos) and provide assistance in Chinese.

#### The whole overseas travel process —— Transportation

The coach is the main transportation for China outbound tourists, especially those tourists choosing group travels. For tourists choosing other travel forms, they prefer to take taxis, subway and buses. Tourists choosing customized travel tend to travel by taxi more often.

What Chinese outbound tourists expect most in terms of transportation experience is that Chinese-using signs (or internationally-used graphic logos) can be provided in public transportation vehicles.

#### The whole overseas travel process —— Sightseeing

Natural landscape is the most attractive category selected by Chinese outbound tourists while traveling abroad, which is followed by historical sites.

What Chinese outbound tourists expect most in terms of travel experience is that Chinese-using signs (or internationally-used graphic logos) can be increased at tourism attractions.



### The whole overseas travel process —— Shopping

Shopping is a necessary “plan” for Chinese tourists while traveling abroad.

Duty-free shops are the most popular shopping spots for Chinese tourists while traveling abroad, followed by large department stores and shopping centers.

Special souvenirs are the largest goods purchased by Chinese outbound tourists, followed by cosmetics. In addition, Chinese tourists also purchase larger quantities of daily necessities, luxury goods and clothes.

On average, Chinese outbound tourists spend 10,130 yuan on goods.

What Chinese outbound tourists expect most in terms of shopping experience is that Chinese-using signs (or internationally-used graphic logos) can

be increased and Chinese-speaking shopping guides can be provided at shopping places, compared with 2013–2014. In absence of Chinese signs, Chinese-speaking shopping guides are very important in assisting Chinese tourists to go shopping and enhancing their shopping experience.

### The whole overseas travel process —— Entertainment

More than 80% of Chinese tourists tend to choose entertainment when traveling abroad, especially male tourists aged below 45 with the monthly income of more than 15,000 yuan.

Evening parties/flavor gardens are the most entertainment places chosen by Chinese outbound tourists, followed by bars/nightclubs, theaters/cinemas.

What Chinese outbound tourists expect most in terms of entertainment

experience is that Chinese-using signs (or internationally-used graphic logos) and assistance provided in Chinese at entertainment places.

### V. Travel Service Providers Selected by Chinese Outbound Tourists

#### Insurance Company

The survey shows that the vast majorities (88.90%) of Chinese outbound tourists agree to and accept travel insurance products, mainly for the aim of preventing various risks during travel.

Chinese outbound tourists often buy travel insurance through travel agencies or travel websites underwritten by Chinese State-owned insurance companies.

#### Travel Agency

In 2014–2015, 86.10% of Chinese tourists tending to travel abroad choose group travel, independent travel and other travel

products offered by travel agencies.

Official websites of travel agencies is the most welcomed reservation channel selected by Chinese tourists, followed by tourism stores.

More than 85% of Chinese tourists when traveling abroad in the future still continue to select the types of travel products offered by travel agencies, of which independent travel (including half-independent travel) is most demanded, followed by group travel products.

More than 64% of Chinese tourists traveling abroad tend to choose self-funded items, and therefore travel agencies can provide differentiated self-funded items according to the types of tourists.

#### Travel Website

More and more Chinese outbound tourists, especially those choosing independent travel and self-guided travel tend to rely on travel websites while traveling abroad.

Chinese outbound tourists querying relevant information or booking accommodations and air tickets through travel websites account for over 50% respectively.

#### Paying Agency

Visa credit cards, cash, Master Card and UnionPay cards are the most popular payment patterns for Chinese tourists while traveling abroad.

The survey shows that UnionPay card is the most frequently-used bank card by Chinese tourists for daily consumption at home, and is also the most common payment method selected by Chinese tourists while traveling abroad. However, UnionPay card is still limited to some business places in a foreign land which do not accept the payment by UnionPay card. This inhibits the spending of Chinese tourists to a certain extent.

#### Cruise Company

The survey indicates that the cruise tour in Southeast Asia and Northeast Asia and other countries around China

is the most welcomed cruise travel type selected by Chinese outbound tourists in the past year. In terms of long-range cruise tour, there is the gradually increasing number of Chinese tourists choosing the Mediterranean cruise routes and Caribbean Cruise routes.

In the future, Chinese outbound tourists will prefer an ocean liner, and in particular those tourists repeatedly choosing cruise travel will tend to travel to the Mediterranean and the Caribbean by Cruise.

### VI. Special Survey

#### Mediterranean Tourism

42.70% of Chinese outbound tourists have toured the Mediterranean region, most of them choose to travel to the Mediterranean region during the 4th or 5th overseas travel.

Most Chinese outbound tourists traveling to the Mediterranean region will give priority to the central region, namely: Italy, Greece, the Aegean Sea and other southern European regions.

Sightseeing is the primary purpose for Chinese outbound tourists choosing to tour the Mediterranean region, followed

by going on holidays. Humanistic characteristics and the natural landscape are most attractive to them.

Improving the visa policy and opening up the special tourism routes are the best approaches to attract the Chinese outbound tourists to travel to the Mediterranean.

#### Africa Travel

The survey shows that in the year 2014–2015 only 4.37% of the respondents traveled to Africa, which attracts the smallest number of Chinese outbound tourists in all the continents.

Sightseeing is the primary purpose of Chinese outbound tourists choosing to tour the African cities, followed by going on a holiday. Compared to all other tourists in China, more tourists travel to Africa because of special interests. Natural attractions and humanistic characteristics are most attractive to them.

Improving the visa policy, conducting special promotion activities and opening non-stop flights, are the best methods to attract Chinese outbound tourists to the African cities.

