

ITB CHINA 2019 TRAVEL TRENDS REPORT



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PREPARED BY KAIROS FUTURE ON BEHALF OF ITB CHINA

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Dear reader,

I am pleased to present to you our first ITB China Travel Trends Report, which is a yearly publication commissioned by ITB China and conducted by Kairos Future.

The ITB China Travel Trends Report 2019/2020 covers the main upcoming trends in Chinese outbound travel demand and will illustrate what experiences Chinese travellers are looking for when embarking on trips.

More than 300 Chinese outbound travel agents from ITB China Buyers Circle, a nationwide buyers’ community for all professional Chinese travel buyers, have been surveyed and interviewed to describe the most important current travel trends.

Customisation was by far the most frequently mentioned trend. All over the world tailored products and experiences are valued, a trend that increasingly applies to Chinese travellers, especially to those with a comparatively high level of

travel maturity. As China’s outbound tourism continues to rise, the demand for customized travel will not only bring huge opportunities, but also the inherent necessity for the industry to adapt to the changing demands from the Chinese travellers.

In order to better understand the new demands of travellers from China, ITB China and Kairos Future have defined of-the-moment topics that will significantly impact the Chinese travel and tourism industry. The four themes in focus of the report are: Island travel, Adventure travel, Sports travel and Culture travel.

The following pages will share insights and numbers about the report to gain a nuanced understanding of what is important from a traveller’s point of view for each of the four themes.

I wish you happy reading!

David Axiotis
General Manager ITB China

Prepared by

KAIROS
FUTURE

Island Travel Partner



Adventure Travel Partner



Culture Travel Partner



Sports Travel Partner



ITB China Buyers Circle Founding Partners



ITB China Buyers Circle MICE and Corporate Travel Partners



ITB China Buyers Circle Customized and Themed Travel Partners



ITB China Group Buyer Partners

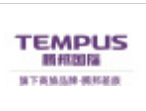


TABLE OF CONTENTS

INTRODUCTION	2
METHODOLOGY	3
ISLAND TRAVEL	4
TRAVELLERS CONTINUE TO BE INFLUENCED BY THE SILVER SCREEN	5
A MOVE AWAY FROM LOW-COST ISLAND TOURS	5
CUSTOMIZATION KEY TO ADDRESSING MARKET SEGMENTATION AND DIVERSE EXPERIENCE PREFERENCES	6
ADVENTURE TRAVEL	8
FROM ‘GOING ABROAD’ TO ‘CLIMBING MT. KILIMANJARO’ – DIFFERING CHINESE NOTIONS OF ‘ADVENTURE’	8
CHALLENGE YOURSELF – THE ENTREPRENEURIAL SPIRIT	8
OUTDOOR ADVENTURE AS PART OF A HEALTHY LIFESTYLE	9
DIFFERENT LEVELS OF DIFFICULTY, COMFORT, AND REMOTENESS	9
INEXPERIENCED ADVENTURERS HAVE WORRIES – HOLD THEIR HANDS!	10
SPORTS TRAVEL	13
GROWING DEMAND – BUT STILL DIFFICULT TO BUY EVENTS TICKETS	13
A LA CARTE PACKAGES INTEGRATING A VARIETY OF EXPERIENCES	14
GETTING CLOSER TO GLOBAL STARS	14
NBA AND EUROPEAN FOOTBALL	14
CULTURE TRAVEL	16
SELL A DESTINATION THROUGH ITS STORIES	17
FROM HISTORIC SIGHTS TO HOMESTAYS	17
EXPERTS AS GUIDES AND PRODUCT DEVELOPERS	17
EVENTS THAT EMBODY LOCAL CULTURE	18
KEY TAKE-AWAYS	20

INTRODUCTION

The Chinese travel market is close to becoming the largest in the world, with China expected to be the dominating home of long-haul travellers globally by 2020. The figures are pointing up not only for the number of leisure travellers, but also for the amount of money spent by each traveller; by 2023, the average outbound traveller is expected to spend 75% more per trip compared to in 2018. ¹

Two major trends on this rapidly growing market point clearly towards increased **diversification** and towards a stronger **experience focus**. As Figure 1 below shows, diversification – and, more specifically, customisation – is the most frequently mentioned trend when **more than 300 Chinese outbound travel agents**, which have been surveyed by ITB China Buyers Circle for this ITB China Travel Trends Report, describe the most important current travel trends.

Figure 1. Prominent words used in survey responses by 300+ travel agents to the question 'What are the most important travel trends in 2019?'

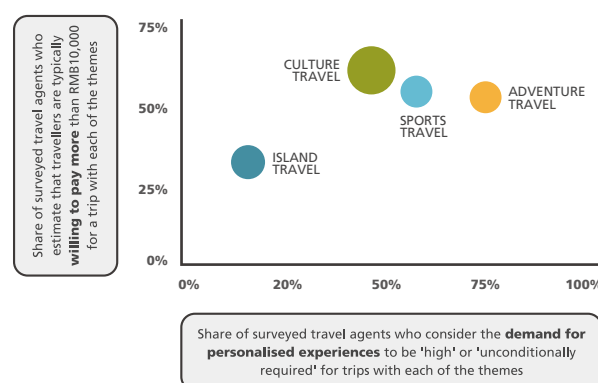


A growing market for **customised tours tailored to individual travellers** is a key implication of the increasing demand for diversification. The demand for diversification also translates into increased importance of niche travel products. In a market that saw 149.7 million outbound travellers during 2018² – and where 2.8 billion domestic trips were taken during the first half of 2018 alone³ – **even small niches are large** in absolute terms. This means that providers of highly specialised travel products ought to look to the Chinese markets to expand their customer base.

While some travel themes are highly niche, others are more prominent. The ITB China Travel Trends Report 2019-2020 takes a look at four such prominent themes, in which Chinese buyers of travel products are seeing a growing demand for from travellers:

- Island travel
- Adventure travel
- Sports travel
- Culture travel

Figure 2. The four travel themes in focus of this report by shares of surveyed travel agencies that estimate a high importance of customisation (X axis), willingness to pay (Y axis), and growth rate (size). (Circle sizes represent the share of surveyed travel businesses that estimate the growth rate of a them to be 30% or higher over the next three years.)



The experience focus, which has been seen for a number of years, is also becoming more diverse with different travellers demanding experiences of different kinds. One key trend is that of travellers not wanting to merely see the attractions of a destination, but to *experience* the destination through **immersion**: living like the locals and feeling the local culture by having it all around you, or connecting to your favourite sports team by experiencing the place where it's from and attending its games in person. The latter – attending sports games – is not only about immersion, but also about **thrills and excitement**.

Figure 3. The four travel themes according to their profiles along the dimensions of 'connecting'–'disconnecting' and 'chilling'–'thrilling', as assessed based on the insights sourced through expert interviews among leading travel businesses in the ITB China Buyers Circle.

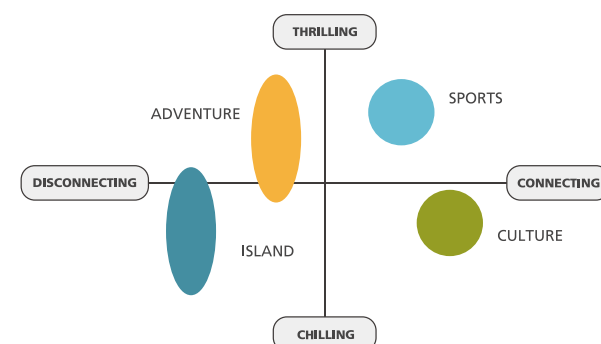
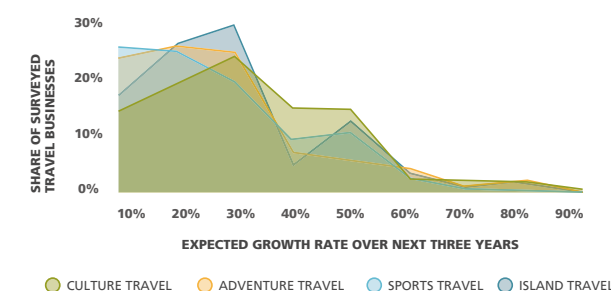
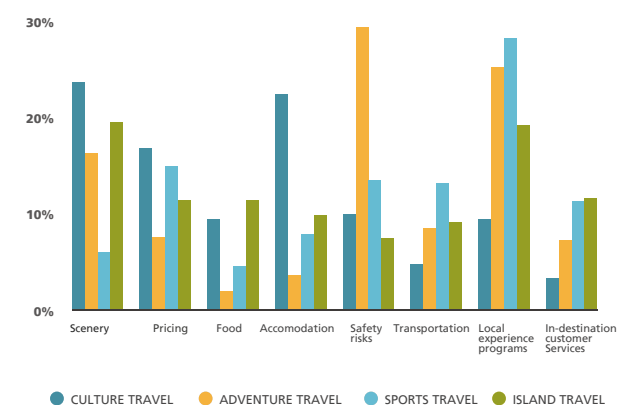


Figure 4. Expected growth of travel themes over the next three years according to 300+ surveyed travel agents.



In contrast to the immersive and exciting travel experiences, some travellers are drawn to the opposite: a **relaxing** trip that lets you **disconnect** from your everyday life and the world around you. This is what many travellers opting to spend their vacation on a secluded island are looking for. A wish to disconnect from modern city life is something island travellers share with travellers going on a nature adventure – which is, however, typically centred around activities that are more thrilling than relaxing. Figure 3 above shows the four travel themes in focus along the dimensions of ‘connection’–‘disconnecting’ and ‘chilling’–‘thrilling’.

Figure 5. What Chinese travellers care most about for trips with each theme, based on which aspects are top-ranked by the highest shares of surveyed travel agencies.



METHODOLOGY

The ITB China Travel Trends Report is built on the foundation of market insights sourced through industry insiders who are experts on the Chinese travel market and the report's selected four travel themes. Two methods have been used to collect insights from these experts:

- Structured **interviews** have been conducted with **17 senior experts** from travel agents and organisations that are members of the ITB China Buyers Circle.
- A **survey** conducted among **300+ travel agents** who have a focus on the Chinese source market.

The interviews, as well as the survey, have focused both on trends in terms of market growth and trends in terms of what experiences Chinese travellers are looking for when embarking on island, adventure, sports, and culture trips.

To add a more direct traveller perspective to the report, the interviews and survey have been complemented by an analysis of **233,122 travel-related online social media posts** in Chinese related to each of the four themes. The social media posts have been structured according to patterns in the text using text analysis methods developed by Kairos Future to allow topics connected to each theme to be identified. In-depth reading of posts closely related to relevant topics have been used for gaining a nuanced understanding of what is important from a traveller's point of view for island trips, adventure trips, sports trips, and culture trips.

1 / Annual Report of China Outbound Tourism Development 2018 [Book] China Tourism Academy (2018)

2 / 2018 年旅游市场基本情况 [Internet] Ministry of Culture and Tourism (2019) / Available: http://zwqk.mct.gov.cn/auto255/201902/t20190212_837271.html

3 / 2018 年上半年旅游经济主要数据报告 [Internet] Ministry of Culture and Tourism [cited by the State Council] (2018) / Available: http://www.gov.cn/shuju/2018-08/22/content_5315811.htm

ISLAND TRAVEL

As China experiences rapid urbanization, Chinese consumers continue to hone their conception of leisure. While China has one of the longest coastlines in the world, beaches are relatively few and far between, and packed with crowds during holiday seasons. In contrast, the vision of escaping to an island oasis is **serenity**. Islands have especially captured the attention of younger generations of travellers, with young couples and young families with children two key market segments.⁴ While seclusion is a key factor in attracting Chinese travellers to island trips, travellers might also opt for an island destination for the possibility of doing water sports – with **diving** the activity most frequently mentioned when the 300+ travel agents surveyed for this report are asked to mention trending island activities. Distinctive local activities – such as interacting with the swimming pigs on the Bahamas’ Big Major Cay⁵ – are also as important.

Demand for island vacations is strong, and appears to be unwavering: travel companies interviewed for this article are reporting an expected annual growth of around 30-35% in the next two to three years for island travel products.⁶

From the perspective of Chinese travellers, islands are synonymous with romance, adventure, and escapism. When looking at topics in online discussion around island travel in Chinese social media, **privacy** is a key topic in island-related conversations, correlating closely with the notion of **romance**. One segment that stands out among island travellers includes soon-to-be wed couples engaging in destination wedding photoshoots and newlywed couples on their **honeymoons**⁷. The most discussed island destinations are Bali, Phuket, and the Maldives – the latter of which is closely connected to the honeymoon topic.

Figure 6. Top destinations that stand out among island trips according to an open question in the survey of 300+ travel agents.



Figure 7. Share of the 300+ surveyed travel agents that say Chinese customers typically prefer to travel with their partners when going on trips within each of the theme categories.

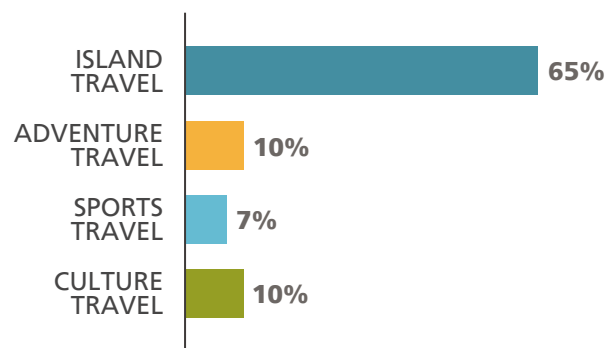


Figure 8. The relative interest in a number of common topics as discussed in analysed posts related to island travel on Chinese social media platforms.

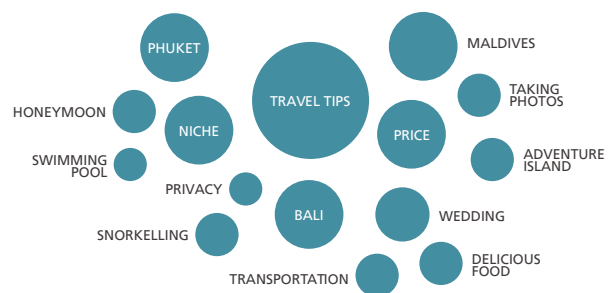


Figure 9. Words used to describe island-related activities that have gained most interest during the last 12 months according to an open question in the survey of 300+ travel agents.



Other online discussions centre on exchange of specific 'travel tips' regarding destinations, transportation, food and money-saving. Another topic – which the online conversations indicate that travellers care a lot about – relates to the quality of the swimming pools of the islands' hotels. Other travellers focus on the sea for water activities, as can be seen in discussions on where to find the best snorkelling.

To facilitate a smooth, carefree, and relaxed journey, a range of governments have instituted **visa-free** policies for island destinations, such as South Korea's Jeju Island, Manado in Indonesia, and for some travellers, Phu Quoc island in Vietnam. This is mentioned as one of the drivers behind the growing interest in island travel by industry experts interviewed for this article.⁸

An increasingly diverse range of Chinese travellers with differing interests and preferences are giving rise to greater market segmentation – and a desire for **personalized and customized** options. Communicating island travel offerings to new customers, and offering new choices to experienced travellers, means an opportunity to explore new marketing platforms. Australia’s Hamilton Island is mentioned by one interviewee as the best example of a destination offering clearly-communicated customized travel packages.⁹

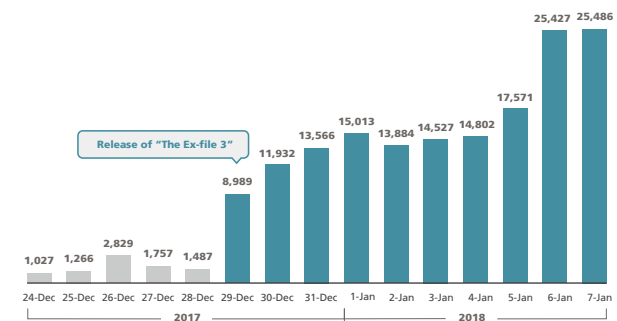
Multi-island tours can be a way to cater to preferences within a travel group, with some archipelagos offering island experiences that feel like separate worlds while being located next to each other. This means that travellers might combine a few days on a tranquil island with pristine beaches, with a few days on a neighbouring island with casinos and a vibrant nightlife.¹⁰

TRAVELLERS CONTINUE TO BE INFLUENCED BY THE SILVER SCREEN

Media is changing the way consumers learn about new islands: **films, TV, and social media imbue previously-unknown oases with different aspirational associations.**¹¹ These appeal to a range of demographics, allowing for more specialized market segmentation.

With a total box office gross of RMB 1.9 billion in China, 2017's film **'The Ex-File 3'** brought its location, **Manado**, Indonesia, into focus on the nation's big screens. In December 2017, within a couple of hours, millions of Chinese consumers were streaming out of theatres around the country with Manado in mind. While Bali and Phuket are familiar holiday destinations in the Chinese consumer landscape, the provincial capital of North Sulawesi was previously little-known.

Figure 10. Number of searches on Baidu for ‘Manado’ before and after the release of the movie ‘The Ex-File 3’. On December 28, 2017, the day before ‘The Ex-File 3’ was released the key term ‘Manado’ yielded 1,487 searches on China’s dominating online search engine. By the first week of January 2018, by contrast, a peak of 25,468 daily searches was conducted – a 1,713% increase of interest within days of the film’s general release.



Similarly to how Thailand's Phi Phi Islands were forever immortalized as a backpacker's dream in the 2000 Leonard DiCaprio vehicle, 'The Beach,' Manado is now inextricably synonymous with 'The Ex-File 3's' subject matter: **'niche,' 'less developed with fewer travellers,' 'beautiful scenery,' and 'slow pace of life,'** were some of the island destination's top associations in social media.

The example of Manado showcases how powerful exposure through film can be for raising awareness of a destination among travellers. Other island destinations, such as the Bahamas, are moving towards working with popular Chinese films and TV shows to generate interest in a similar way among Chinese travellers.¹²

A MOVE AWAY FROM LOW-COST ISLAND TOURS

In response to China's breakneck pace of urbanization, consumers have increasingly been drawn to the allure of simple island life. Over the years, a number of operators have taken advantage of this, and attracted travellers with low-cost tours, sometimes priced as low as RMB 999 for an all-inclusive trip to Bali.¹³ However, the reality of these

4 / Chen Hua, Product Director of Australia and New Zealand region of CTS [Interview] (2018, December); Susie Sun, Di-rector of Island Division, Tsongcheng Travel Co., Ltd. [Interview] (2018, December); Zhu Wenbo, Vice President and General Manager of Business, China Kanghui Tourism Group [Interview] (2018, December); Bamboo Jizhong Zhou, CEO, 8 Continents Travel [Interview] (2018, December)

5 / Paul Strachan, Senior Director, Canada, Bahamas Ministry of Tourism and Aviation

4

[Interview] (2019, March)

6 / Chen Hua, Product Director of Australia and New Zealand region of CTS [Interview] (2018, December); Bamboo Jizhong Zhou, CEO, 8 Continents Travel [Interview] (2018, December); Zhu Wenbo, Vice President and General Manager of Business, China Kanghui Tourism Group (2018, December)

7 / Susie Sun, Director of Island Division, Tsongcheng Travel Co., Ltd. [Interview] (2018, December)

8 / Chen Hua, Product Director of Australia and New Zealand region of CTS [Interview] (2018, December)

9 / Bamboo Jizhong Zhou, CEO, 8 Continents Travel [Interview] (2018, December)

10 / Paul Strachan, Senior Director, Canada, Bahamas Ministry of Tourism and Aviation [Interview] (2019, March)

11 / Susie Sun, Director of Island Division, Tongcheng Travel Co., Ltd. (2018,

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12 / Paul Strachan, Senior Director, Canada, Bahamas Ministry of Tourism and Aviation [Interview] (2019, March)

13 / Susie Sun, Director of Island Division, Tongcheng Travel Co., Ltd. [Interview] (2018, December)

‘island getaways’ stands in stark contrast to the original conception of a retreat from urban life: also known as ‘zero dollar tourism,’ low-cost tours degrade the travel experience by surprising travellers with mandatory shopping trips. An analysis of Chinese social media posts on ‘cheap island tours’ reveal testimonies from travellers complaining about low quality food options, sales-oriented tour guides, and shopping stops rendering them unable to enjoy their island experience. One consequence is a lowered standing of the destination in the consumer’s mind, and eradication of their trust in travel agencies.

The ‘zero-dollar tourism’ trend might now be coming to an end, following shifting consumer values as well as increased regulatory oversight by destination government authorities. According to Baidu’s search index, the key search term ‘cheap island trip/tour’ yields an average of a mere five daily searches, indicating very low interest from prospective travellers. Destination governments are working to address the perceived threat of ‘zero-dollar’ products to their tourism brands: in 2018, the Indonesian Tourism Association began to intensively regulate low-cost tours, and Bali, one of China’s top island destinations, has seen all tour-related shopping sites close. Since 2016, Thailand has also taken drastic action to eliminate zero-dollar tourism.

In line with the move away from low-cost island trips, there is a growing demand for trips at the other end of the scale: premium and luxury trips. Tahiti and the Seychelles are two examples of high-end destinations seeing increased interest which were mentioned by travel experts interviewed for this article.¹⁴ The Seychelles, with its 115 different islands, has been described as providing everything from ultimate relaxation to snorkelling, scuba diving, and other adventures, with magnificent tropical landscape as well as luxurious accommodations on the islands.¹⁵

CUSTOMIZATION KEY TO ADDRESSING MARKET SEGMENTATION AND DIVERSE EXPERIENCE PREFERENCES

More than 70% of island tourists are expected to opt for tailored or self-guided tours.¹⁶ As the purchasing power and travel knowledge of Chinese consumers continues to grow, vendors are seeing an increasing number of tourists choosing customized tours to meet their specific travel needs.

‘Travel tips’ is one of the largest themes in the analysed travel – related social media posts. By exploring destinations through social media, and developing preferences for activities on their itinerary, consumers are

prepared to make informed decisions about their travel plans. On top of beaches, more diversified, **niche activity** offerings – including hiking active **volcanos**, **whale** watching, and jungle adventures – reflect the present shift towards experiential tourism.¹⁷ Island destinations mentioned by interviewees for the unique experiences they offer include Madagascar, with its rain forest in Andasibe-Mantadia National Park and the sacred cave in Ankarana, as well as the Greek island of Kos, where the architectural sights of Castle Neratzia and the Casa Romana from the third century – famous for its extravagant mosaics – attract a lot of interest.¹⁸ More than 70% of island tourists are expected to opt for tailored or self-guided tours.¹⁹

COMPANIES INTERVIEWED FOR THIS CHAPTER

8 CONTINENTS TRAVEL

Founded in January 2012, 8 Continents Travel is headquartered in Shanghai, with branches in Beijing and Chengdu. With destinations all over the world, 8 Continents Travel mainly offers honeymoon and family vacation packages, as well as private customized travel services. 8 Continents Travel is well known for its high-quality tailor-made services and the ability of taking good care of their guests. Through ensuring high-quality services with its series of criteria and standards, such as Hotel/Resorts Selection Criteria, Flight Selection Criteria, Visa Application Standards, Customized Services Standards and Emergency Procedure Standards, and retaining a “friend-to-friend” relationship with the customers, 8 Continents Travel acts unique in luxury travel industry of China.

BAHAMAS MINISTRY OF TOURISM AND AVIATION

The Bahamas is sprinkled over 100,000 square miles of ocean, starting just 50 miles off the coast of Florida. It comprises 700 breathtaking islands, over 2,000 rocks and cays, and boasts the clearest water on the planet with a visibility of over 200 feet. Travelers can see their toes as easily as they can the world’s third largest fringing barrier reef.

CHINA KANGHUI TOURISM GROUP

China Kanghui Tourism Group Co., Ltd. ("Kanghui") was founded in 1984 and its pre-decessor was based in Beijing and affiliated to China Disabled Persons Welfare Foundation. After more than 30 years of development, Kanghui has grown into one of the largest tourism corporations in China. Its operations cover a wide range of outbound travel, inbound travel, domestic travel, travel to Taiwan, cruises, visa services, air ticket agency, customized travel, travel services and exhibition business. While actively promoting the “Internet +” and improving online quality services to form a tourism industry chain that integrates online and offline services, it is also committed to building “the most powerful and comprehensive operator of tourism industry chain resources in China”. Meet Kanghui with the mindset of “re-entrepreneurship!

China Travel Service Head Office Co.,Ltd.

China Travel Service Head Office Co.,Ltd. is one of the largest state-owned travel agencies in China, with presence in all cities in the country as well as 15 countries across the world. The annual turnover of CTS Travel Division exceeds RMB15 billion. The company’s product line of 70 offerings served 500 travellers in 2018, generating revenue of RMB15 million.

TONGCHENG

In 2015, Tongcheng integrated all overseas trips and established its Island Division to further explore this segment. It has served 600,000 outbound trips over the years. Tongcheng Tourism launched the brand of “Tongcheng Special Line”, which has won the recognition of a wide range of users with good reputation, high quality and differentiated and excellent services. On this basis, the upgraded version of “Extraordinary Collection” further improves user experience with eight updated services. The “Extraordinary Collection” of Tongcheng’s Island Division have served over 10,000 trips with 100% satisfaction. Its pursuit for service quality and high standards in terms of transportation, accommodation, itinerary and local services has been highly recognized by tourists.

¹⁴ / Chen Hua, Product Director of Australia and New Zealand region of CTS [Interview] (2018, December)

¹⁵ / Zhu Wenbo, Vice President and General Manager of Business, China Kanghui Tourism Group [In-terview] (2018, December)

¹⁶ / Zhu Wenbo, Vice President and General Manager of Business, China Kanghui Tourism Group [In-terview] (2018, December)

¹⁷ / Susie Sun, Director of Island Division, Tongcheng Travel Co., Ltd. [Interview] (2018, December)

¹⁸ / Zhu Wenbo, Vice President and General Manager of Business, China Kanghui Tourism Group [In-terview] (2018, December)

¹⁹ / Zhu Wenbo, Vice President and General Manager of Business, China Kanghui Tourism Group [In-terview] (2018, December)

ADVENTURE TRAVEL

Adventure

travel means **challenging yourself** and trying something new – either something that no one has done before, or something that is new to you as an individual. It typically takes the form of outdoor activities in nature, sometimes in remote areas, and often leads to some form of personal transformation. Adventure travel is still at an early stage in the Chinese market – but with a rapidly growing interest within both the advanced and the casual segment, **China is expected to become a driving force within the adventure travel sector internationally.**²⁰

Figure 11. Relative sizes of the discussions of different activities related to adventure travel in the analysed posts from Chinese social media.

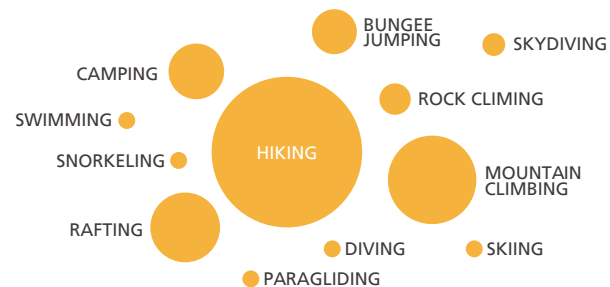


Figure 12. The activities related to adventure travel that have gained most interest during the last 12 months according to an open question in the survey of 300+ travel agents.



FROM 'GOING ABROAD' TO 'CLIMBING MT. KILIMANJARO' – DIFFERING CHINESE NOTIONS OF 'ADVENTURE'

What is an adventure differs widely from person to person. For some people, going abroad is an adventure in itself. At the other end of the scale, adventure means dangerous and physically highly demanding challenges. An extreme example is '7/2' – climbing the highest peaks of seven continents plus skiing to the north and south poles.²¹ There is a wide range of adventure travel forms in between, with different adventure travel segments that the industry can cater to the needs of.

For some travellers, the ultimate adventure can be found in high **adrenaline** activities such as skydiving or paragliding. For others, adventure requires embarking on an expedition into the **wilderness**. Taking your children to visit the rainforests of Bali can constitute a family adventure, **and there is a growing 'soft adventure' segment of travellers who want to experience an adventure without giving up the comforts of sleeping in a hotel bed and eating high quality food.**

Providers of adventure travel products targeting the outbound Chinese market need to **tailor products to traveller segments with different expectations on difficulty and comfort**. Less experienced adventurers may also need a certain level of coaching and encouragement, as is argued in this chapter's final section.

CHALLENGE YOURSELF – THE ENTREPRENEURIAL SPIRIT

What the above instances of 'adventure' have in common is that they let travellers challenge themselves and step out of their comfort zones. This means exploring something that is unknown to them, whether it is the feeling of free-falling during a skydive or the sensation of being far away from everything while sleeping in a tent under the stars.

The interest in adventure among Chinese travellers runs parallel to the strong entrepreneurial ideals present in today's Chinese society. 'Expedition and entrepreneurship have similarities, such as extraordinary **courage and dedication**, not being afraid of difficulties, challenging yourself and constantly surpassing yourself', explains one of the travel

industry experts interviewed for this article, who adds that **many entrepreneurs and company leaders love adventure.**²²

Figure 13. Words frequently mentioned in online discussions of the challenge involved in adventure travel.



OUTDOOR ADVENTURE AS PART OF A HEALTHY LIFESTYLE

In the form of outdoor activities, adventure travel is in line not only with entrepreneurship, but – as a way of **getting close to nature** – also with a widespread ideal of living a healthy and active life.²³ Compared to many other ingredients in a healthy lifestyle, outdoor adventure is also **particularly suitable for sharing in social media**: posts and photos; photos of yourself rock climbing surrounded by scenic mountain peaks, for example, make you stand out.

Figure 14. Words frequently mentioned together with 'nature' and 'landscape' in online discussions of adventure travel.



For many Chinese city-dwellers, the great outdoors can be an exotic space that feels really **far from home**. To some, there is also a **romantic** component, visible for example in social media descriptions like those of the starry sky that you can experience when staying overnight in remote areas:

'Camping is really tiring. Apart from the fact that I can't take a bath, what's most uncomfortable is the toilet situation. But the whole experience with the scenery and the contact with the nature makes it very worthwhile nonetheless. We stayed near a lake, listened to the sound of the water, and watched the sunrise and sunset. In the evening, we watched the stars from the tent and I fell asleep to my husband's lullaby.'

DIFFERENT LEVELS OF DIFFICULTY, COMFORT, AND REMOTENESS

Adventure travellers can be segmented along several lines:

1. **Different difficulty levels.** More experienced adventurers, naturally, demand a tougher challenge than others in order to feel that an activity is an adventure. Conversely, those who are new to an activity require something less demanding and may also need coaching and encouragement. (See the chapter's final section below.) Difficulty can also mean exclusivity; if an activity is difficult to experience because of the attached cost, skills, or time needed to get to the venue, then the uniqueness of the activity can make it more attractive to those who can achieve it.
2. **Differing comfort requirements.** The core adventure travellers do not care about comfort, as their whole focus is the challenge.²⁴ Other travellers are discouraged by low comfort levels, as illustrated by the social media post quoted in the previous section mentioning the lack of showers and toilets when hiking and camping.
3. **Standalone activities versus longer expeditions.** For some travellers, the adventure lies in venturing into the woods or mountains far away from home, which typically means being away for a longer period of time. Others want to do a challenging, high-adrenaline, short-term activity as part of a city-break or a holiday that does not have an

20 / Finifrock, Jake, Regional Director, Asia, ATTA [Interview] (2019, January)

21 / Finfrook, Jake, Regional Director, Asia, ATTA [Interview] (2019, January); Forrest Lynn, Founder, Diadema International Travel Agency [Interview] (2019, January)

22 / Forrest Lynn, Founder, Diadema International Travel Agency [Interview] (2019,

23 / Chen Yao, Deputy General Manager, Sparkle Tour, CYTS [Interview] (2019, January)

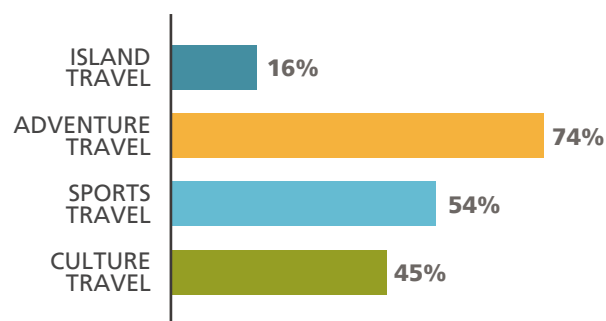
24 / Zhang Jun, General Manager, China International Travel Service (Shenzhen) Co., Ltd. [Interview] (2019, January) January)

overall adventure theme. The latter can, for example, mean doing a bungy-jump as part of a visit to Queenstown, New Zealand, or Macau, China

A segment to keep an eye on is one that can be described as one of comfortable, soft adventure. This category of travellers, which might include families with children, want to challenge themselves in a controlled and *not too challenging way*, and *without giving up comfort*. For this group, the adventure might be just part of a holiday trip that is otherwise about relaxation.²⁵ In the words of one interviewee, 'adventure activities that are suitable for the average Chinese traveller [are] appropriately stimulating, with *just the right amount of challenge and reward*'.²⁶

Outside of the tightly controlled high adrenaline activities themselves – which leave little room for customisation – customisation has an important role as the uniqueness is part of what makes adventure travel attractive.²⁷ Among the surveyed travel agencies, almost three quarters consider customised and personalized travel experiences to be in high demand or absolutely necessary when it comes to adventure trips – a much higher share than for the other travel themes covered in the ITB China Travel Trends Report.

Figure 15. Share of surveyed travel agencies who consider the demand for customized and personalized travel experiences to be 'high' or 'unconditionally required' in trips with four different themes.



INEXPERIENCED ADVENTURERS HAVE WORRIES – HOLD THEIR HANDS!

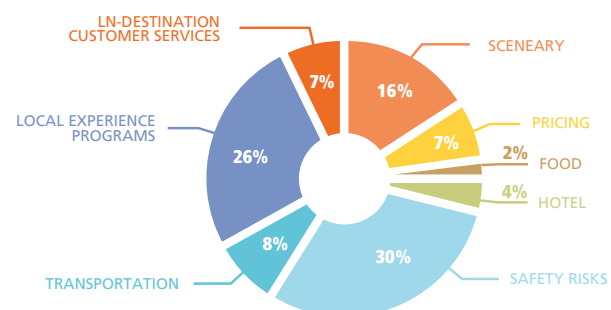
While challenging oneself is a main driver behind adventure travel, the prospect of stepping out of your comfort zone to do something you have never done before nonetheless gives rise to worry. Safety concerns are more common in China than internationally, as travellers are – so far – less experienced in adventure travel.²⁸ This is reflected in the analysed online discussions about adventure trips, in which safety concerns and feelings of worry constitute a noteworthy theme. Topics include safety risks of activities such as bungy jumping as well as the risk of **getting lost in the wilderness**, and the dangers stemming from **not carrying the right equipment**. Parts of the discussions on preparedness and correct equipment relate to what **clothing** to wear for specific outdoor adventure activities in order not to get **wet** or **cold**:

'Many climbers get wet from the rain in the rain forest, which makes them catch a cold and lose their physical strength. Therefore, please make sure to wear waterproof clothes'.

On the topic of risks, there is also a discussion about whether it is dangerous to go adventuring as a solo female traveller.

In line with the safety concerns seen in online discussions, the survey shows that safety is also what the surveyed Chinese travel agencies see that Chinese travellers care most about.

Figure 16. Shares of surveyed travel agencies that find certain aspects to be the most important for Chinese travellers when it comes to adventure trips.



In order to prevent getting lost or forgetting an important piece of equipment, a recurring suggestion from travellers online is to either hire a guide or join a tour group, indicating **a market for local knowledge in the form of guiding services**. It also points to the importance for providers of adventure travel products – at least when targeting segments other than extreme adventurers – in stressing the safety and robustness of their activities, in order to **make prospective travellers feel confident that everything is under control**. The worries expressed about equipment also suggests that there might be a market for tour packages, catering to entry-level adventure travellers, that include more equipment than what is typically provided.

Figure 17. Words frequently mentioned in online discussions of worries and risks related to adventure travel.



The right balance between adventurousness and confidence needs to be found for each adventure traveller segment. One travel industry expert interviewed for this report points to the importance of letting travellers choose between tougher and more comfortable offerings, and to include 'safe and moderately difficult' in the description of products targeting amateurs. For travellers worried about a low comfort level, 'clean and relatively comfortable accommodation' and 'simple yet unique meals' are also selling points.²⁹

25 / Zhang Jun, General Manager, China International Travel Service (Shenzhen) Co., Ltd. [Interview] (2019, January)

26 / Finifrock, Jake, Regional Director, Asia, ATTA [Interview] (2019, January)

27 / Chen Yao, Deputy General Manager, Sparkle Tour, CYTS [Interview] (2019, January)

28 / Finifrock, Jake, Regional Director, Asia, ATTA [Interview] (2019, January)

29 / Zhang Jun, General Manager, China International Travel Service (Shenzhen) Co., Ltd. [Interview] (2019, January)

COMPANIES INTERVIEWED FOR THIS CHAPTER

Adventure Travel Trade Association (ATTA)

**China International Travel
Service (Shenzhen) Co., Ltd.**

Diadema International Travel Agency

Sparkle Tour

SPORTS TRAVEL

A component in both of the two previously covered travel themes – island travel and adventure travel – is that of physical activity in different forms, from leisurely snorkelling at a beach to engaging in extreme sports such as parachuting. For a third travel category with a growing interest on the Chinese market, the sports are at the very centre. Such trips are typically built around big sports events and, as such, **exclusive in power of the irreproducible nature of every event** – for a football fan who, for example, wants to experience the 2020 UEFA European Football Championship on-site, there will not be any second chance to do so once the games have taken place or the tickets are sold out.³⁰

The events at the centre of the sports tours are of two main kinds: sports events that the travellers themselves participate in – such as **marathons** – and events of which the traveller is a spectator.³¹ While **health-consciousness** and **self-cultivation** – two key concerns of younger generations of Chinese – are driving forces behind the former, the latter is **'all about indulgence'**, in the words of one of the interviewed travel companies.³² The excitement of watching important games live is keys here, with the opportunity to watch **global sports** stars perform live in important games a main attraction. With exciting experiences at the very core of a sports trip, no matter if a traveller is there to participate or to watch, it is no surprise that of a survey ITB China conducted among more than 300 travel agencies, **sports travellers care most about on-site experiences**.

Figure 18. Words frequently used when sports trips are discussed in Chinese social media.



Figure 19. The activities related to sports travel that have gained most interest during the last 12 months according to an open question in the survey of 300+ travel agents.



GROWING DEMAND – BUT STILL DIFFICULT TO BUY EVENTS TICKETS

Sports travel is a travel form seeing increasing interest among Chinese travellers. An aggregation of estimations by the three hundred surveyed travel agentes points towards a **market increase by 25-30% over the coming three years**. The travel form, which can carry with it significant costs for travellers when participating in big games, is becoming increasingly accessible through rising income levels. The market size of the broader sports consumption category, of which sports travel forms part of, is expected to reach **RMB 1.5 trillion** by 2020.³³

Despite growing interest and purchase power, the difficulty that is often involved in getting tickets – especially for individual travellers – means there are still barriers. The difficulty is partly due to the scarcity of tickets, but also because it can be overly difficult for the inexperienced to navigate the channels through which tickets are distributed.³⁴ The hassle involved in securing tickets – for example seen in a large number of Chinese social media posts asking for advice on the topic – means travel agencies and package providers have a critical role to fill.

30 / Chen Xiaobing, Founder of Caissa China and President of Caissa Travel [Interview]
(2019, February)

31 / Yasuhiro Tsuboi, Director, Member of the Board and Head of Japan Inbound Business, JTB [Interview] (2019, April)

32 / Zhao Wenzhi, Executive Vice President, GZL International Travel Service Ltd. [Interview] (2019, February)

34 / Zhang Jie, Head of Ctrip Theme Travel Platform, Ctrip [Interview] (2019, February)

A LA CARTE PACKAGES
INTEGRATING A VARIETY OF
EXPERIENCES

A recurring topic in the interviews with travel industry experts from the ITB China Buyers Circle is the crucial importance of customization and tailoring of sports travel products. One interviewee describes how sports travel products are evolving into ‘a la carte menus’ with a variety of options that a traveller can choose to include or leave out. While an experienced traveller might be contempt with only including events tickets and accommodation in a package, components such as international and local transportation, food, and various local experiences can be critical for others.³⁵

For sports trips in which the traveller is actively playing sports, interviewees see – in the same way as for adventure trips – a growing demand for products that facilitate the participation. This can, for example, include renting gear and clothing as part of a travel package. This is mentioned by one interviewee as especially important for winter sports – a segment expected to see a rapid market growth – for which bringing your own gear can be particularly troublesome.³⁶

For some travellers, choosing between a trip for playing or watching sports is not enough. For those travellers, what can be better than a travel package that includes both? As one of the interviewees points out, travellers attending a winter sports event as spectators might also want to hit the slopes themselves at a nearby ski resort. Despite the demand, however, there are **few packages on the market today that in this way combine watching with playing.**³⁷

GETTING CLOSER TO GLOBAL
STARS

Other components that travel product providers should consider including in sports packages are activities related to **famous sports clubs and stars.** Several interviewees point out that stars are a key factor attracting travellers to attend sports events. Some travel to cheer for Chinese athletes competing in international competitions or, while others watch global icons such as top European football players – several of which are immensely popular in China.³⁸ With many sports travellers opting to attend overseas events to watch stars or teams they are fans of in action in important championships, there is a significant market also for **side experiences that bring travellers closer to the teams and**

35 / Zhao Wenzhi, Executive Vice President, GZL International Travel Service Ltd. [Interview] (2019, February)
36 / Yasuhiro Tsuboi, Director, Member of the Board and Head of Japan Inbound Business, JTB [Interview] (2019, April)
37 / Zhao Wenzhi, Executive Vice President, GZL International Travel Service Ltd. [Interview] (2019, February)
38 / Chen Xiaobing, Founder of Caissa China and President of Caissa Travel [Interview] (2019, February); Zhang Jie, Head of Ctrip Theme Travel Platform, Ctrip [Interview] (2019, February)

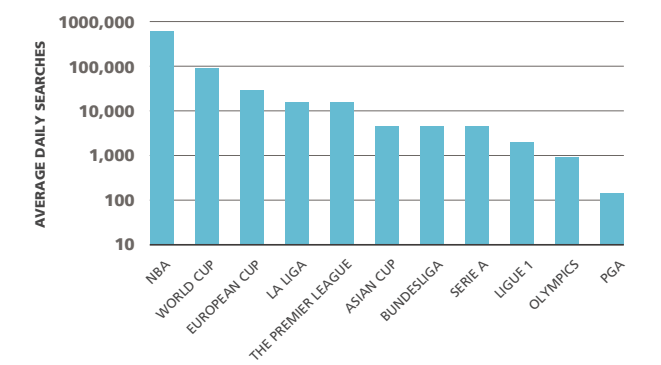
the stars. An example of such a successful product is offered by Caissa, in the form of a meal at a restaurant located inside Real Madrid’s home stadium which is frequently visited by the club’s players – with a main selling point being the **increased chance of encountering one of the stars.**³⁹

‘Local activities’ is what travellers care most about when going on sports trips according to the surveyed travel agencies. The demand for local activities includes a demand for experiences that are not sports-related as components in sports travel packages. That way of **increasing the diversity** of a tour will appeal to those in a travel group who are not as big sports fans as others. Culinary experiences, photography tours, and all kinds of activities for experiencing the local culture are mentioned by the interviewed travel companies.⁴⁰ **Families with children** are a traveller segment on the rise⁴¹, meaning an increasing demand for child-friendly activities as part of sports trips. 72% of the surveyed travel agencies, however, agree that most sports travel groups are **groups of friends.**

NBA AND EUROPEAN
FOOTBALL

NBA, the American basketball league, and **World Cup** football are immensely popular championships among Chinese sports fans, as reflected by the online search statistics in Figure 20 below. Among Chinese sports travellers, however, **the European football leagues** in England, France, Germany, Italy, and Spain are the most popular to attend. Apart from these, the **2019 AFC Asian Cup** and the **2020 UEFA European Football Championship** are expected to be the top events among Chinese sports travellers over the next couple of years.⁴²

Figure 20. Online search interest in major sports championships on China’s dominating online search engine Baidu. (March 2015 – March 2019.) Note that the scale is logarithmic: if a bar is twice as high as another, the search interest it refers to is ten times as big. (Source: Baidu)



39 / Chen Xiaobing, Founder of Caissa China and President of Caissa Travel [Interview] (2019, February)
40 / Chen Xiaobing, Founder of Caissa China and President of Caissa Travel [Interview] (2019, February); Zhang Jie, Head of Ctrip Theme Travel Platform, Ctrip [Interview] (2019, February); Yasuhiro Tsuboi, Director, Member of the Board and Head of Japan Inbound Business, JTB [Interview] (2019, April)
41 / Chen Xiaobing, Founder of Caissa China and President of Caissa Travel [Interview] (2019, February)
42 / Zhang Jie, Head of Ctrip Theme Travel Platform, Ctrip [Interview] (2019, February)

COMPANIES INTERVIEWED
FOR THIS CHAPTER

Caissa

Founded in 1993, Caissa Travel focuses on the core business of tourism and rapidly expands in the global market, creating a unique business model covering the whole industry chain, which integrates channels, products, destination resources and operations. It has set up its offices in 7 major offshore cities, including Hamburg, Paris, London and Los Angeles, completed by its options in nearly 50 coastal and core commercial cities in China. It has introduced more than 20,000 high-end travel products serving more than 120 countries and regions around the world. Caissa has been authorized as the exclusive ticketing agent for the Chinese Olympic Committee in the Olympic Games Tokyo 2020 and will serve the Olympics family for the fifth time.

Ctrip

Founded in 1999, Ctrip currently has nearly 32,000 employees. Headquartered in Shanghai, it has offices in 23 cities in the world. It follows a business model that combines Internet with traditional tourism.

It provides a full range of business and leisure travel services to nearly 300 million members. Ctrip was listed on NASDAQ in 2003.

GZL

Founded on December 5th, 1980, Guangzhou GZL International Travel Service Ltd. is the only diversified travel agency in China that has won ‘China User Satisfaction Tripod’, the highest honor of quality management in China’s tourism industry and has been recognized by former AQSIQ and former National Tourism Administration as the ‘national tourism service quality benchmark’. In the first industry ranking published by China Travel Service Association in 2018, GZL won six awards, including ‘Top 20 Travel Service Brands in China in 2018’, ‘Excellent Outbound Travel Agency in 2018’ and ‘Excellent Domestic Travel Agency in 2018’.

JTB

Over 100 years of trust, professionalism and expertise. The JTB Group was founded in 1912 as the Japan Tourist Bureau, with the objective of contributing to the Japanese economy by bringing foreign visitors to Japan. During the subsequent 100 years, the JTB Group served as a leader of growth in Japan’s tourism industry and one of the main creators of Japan’s travel culture, while setting itself apart through its contribution to society, a defining common mission for all its businesses. Today, JTB’s DNA is defined by the commitment to the customer, and the bond of trust developed as a result of each employee’s effort, travel expertise, and professionalism.

CULTURE TRAVEL

Of the four travel themes the ITB China Travel Trend Report focuses on, culture travel is the theme where the surveyed Chinese travel agencies see **the fastest growth** rate. 62% of respondents report an **expected growth of 30% or more** over the next three years and some interviewed companies report expected growth rates up to **200%**.⁴³ Culture travel is also the theme which travellers, according to the surveyed travel agencies, have the **highest willingness to pay for**. At the core of this theme is a wish to experience the local culture of a destination, and to understand it better by learning more about its history and its customs. This can be either through cultural institutions (such as museums), through immersion in the local culture, or through attending cultural events. Text analysis of Chinese social media posts related to culture travel shows a number of topics, such as visiting museums, that stand out among culture travellers, as illustrated below.

Figure 21. Relative sizes of keywords related to culture travel in the analysed posts from Chinese social media.

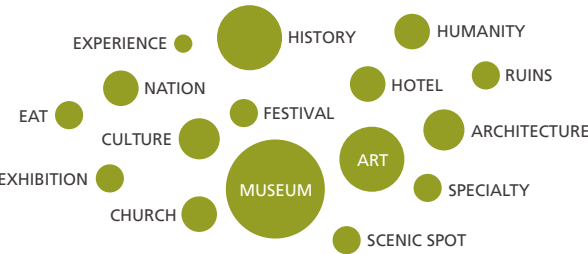


Figure 22. The activities related to culture travel that have gained most interest during the last 12 months, according to survey responses of 300+ travel agents.



Figure 23. Share of surveyed travel agencies who agree that the growth rate will reach 30% or more over the next three years in four theme trip categories.

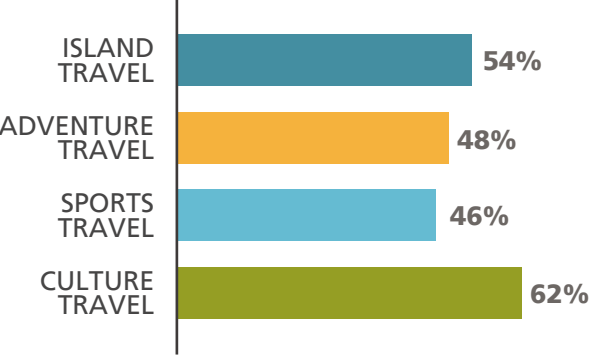
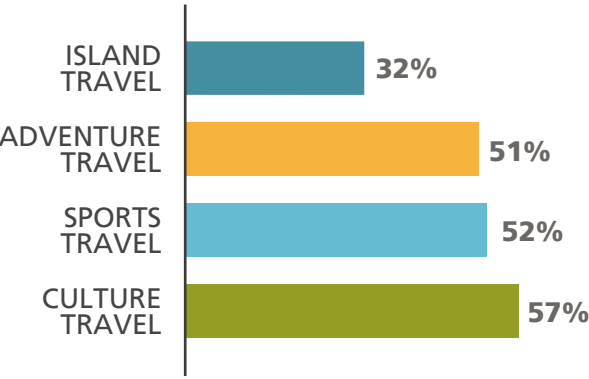


Figure 24. Share of surveyed travel agencies who think travellers are willing to pay more than RMB10,000 for trips within four different theme categories.



SELL A DESTINATION THROUGH ITS STORIES

Even more than the previously covered sports travellers, for many of whom a key component is to connect with a sports team and experience the local culture around it, culture travellers – as the label suggests – focus on the cultural aspects of a destination. One of the interviewed travel industry experts, who states that culture travel is driven by **curiosity** and a willingness to explore, suggests that China's own long history makes Chinese travellers especially inclined to also appreciate other countries that offer unforgettable culture experiences.⁴⁴

While there is a general trend of travellers moving from a desire to see a destination to *experiencing* it, culture travellers go one step further by also aiming to *understand* a destination. Many of these knowledge-seeking travellers are **experienced outbound travellers**.⁴⁵ Some of them read up on a destination and its history before going, as one traveller describes in a social media update:

'Before the trip, I spent two months reading "What is Renaissance" by Nanami Shiono [...] I chose Italy because of my love for these histories and the culture. I am so interested in the stories behind every piece of architecture, every painting, and every sculpture. I want to find out about these before travelling.'

The stories of a place are important to inspire these travellers to visit a destination. Apart from factual stories in history books, as in the above quote, travellers may also be inspired through films, food, or some other experience that connects them culturally to a destination.⁴⁶

FROM HISTORIC SIGHTS TO HOMESTAYS

In some respects, culture travel is traditional: this is the travel theme in which traditional tourism sights, in particular museums and spots with historic significance, are of greatest importance. When discussed in Chinese social media, museum visits during trips are described as a good way to better understand different nations and cultures, as well as the local people, as in the following example:

'If you want to really understand that country, you must not miss the museum [...] located in Koror, Palau's capital. [It contains] a large number of collections on anthropology with historical objects, with very good preservation of history and culture, which is the best place to learn about the local history.'

However, other travel products that let visitors better understand local culture – many of them more immersive compared to the traditional sights – are also becoming popular and the demand is getting increasingly diverse. Many of today's Chinese travellers visiting Europe, for example, are keen to experience local **wine culture** through visiting wineries, and to sample and learn about the local cuisine. Overall, the experience offered through a culture travel product is increasingly targeting **more specific demands**.⁴⁷

Accommodation can also have a key role in helping travellers understand and experience the local culture of a destination. **Homestays** – an immersive form of accommodation that lets you **live like the locals, with the locals** – are expected to keep rising in popularity among Chinese travellers. The demand is, at the same time, also **increasingly diverse** for accommodation, translating to a need for a wide range of accommodation options. A general trend is towards a preference for **higher-quality accommodation**.⁴⁸

EXPERTS AS GUIDES AND PRODUCT DEVELOPERS

While interviewed industry experts point out that cultural trips typically take the form of individual and self-guided tours, guided group tours – although less immersive – are a way of packaging a variety of cultural experiences that is also expected to stay in demand.⁴⁹ According to the interviewed experts, the **main audience** of cultural travel are mainly **middle-aged and older tourists**.⁵⁰ (The surveyed travel agencies provide slightly different estimations, with a clear majority [68%] indicating that the typical culture traveller is born in the 1960s or 1970s.) With many outbound Chinese travellers (not least among the older generation) facing a language barrier when travelling abroad, Chinese-speaking guides will stay in demand and are described as an upgraded service for Chinese travellers.

One of the interviewed industry experts explains how culture travellers

43 / Chen Zhuo, General Manager, Europe Division & Cultural Travel Division, CTS Shanghai [Interview] (2019, March)

44 / Bora Shnitman, Israel Tourism Attache in China, Israel Ministry of Tourism [Interview] (2019, April)

45 / Mengran Li, UTour [Interview] (2019, March)

46 / Mengran Li, UTour [Interview] (2019, March)

47 / Mengran Li, UTour [Interview] (2019, March)

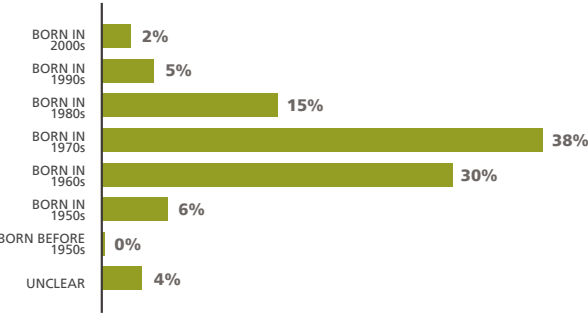
48 / Maria Yi Xin, Chief Financial Officer, Tuniu Corp. [Interview] (2019, March); Mengran Li, UTour [Interview] (2019, March)

49 / Chen Zhuo, General Manager, Europe Division & Cultural Travel Division, CTS Shanghai [Interview] (2019, March); Maria Yi Xin, Chief Financial Officer, Tuniu Corp. [Interview] (2019, March)

50 / Mengran Li, UTour [Interview] (2019, March)

are – more than others – **expecting guidance from experts and ‘opinion leaders’**. This is an argument for recruiting guides who have lived at the destination for a longer time and are experts on their topics, and also for designing new culture travel products together with experts in a wide range of fields. The involvement by such experts can serve as a selling point towards increasingly quality-aware travellers.⁵¹ Guides with a deep understanding of the local culture is especially important here, because of how important **authenticity** is for culture-related tours.⁵²

Figure 25. Share of surveyed travel agencies saying that culture travel primarily attracts travellers in each age group.



EVENTS THAT EMBODY LOCAL CULTURE

Just like for sports trips, events are also important for culture travel. Three types of seasonal events are mentioned by the interviewed experts. One is **art and music festivals**, such as Mozart Week in Salzburg or the Festival of Lights in Jerusalem.⁵³ Another type is **food-and-drinks-related**, with Munich’s Oktoberfest a prime example. Finally, local festivals connected to local or national **holidays** – such as the Running of the Bulls during the San Fermín festival in Pamplona, Spain, the Songkran festival in Thailand, or the Day of the Dead in Mexico – are mentioned for their attractiveness towards Chinese travellers. A common feature for the events held forth by the interviewed experts is that they all, in different ways, let travellers connect to and get immersed in some part of the local culture. In the words of one interviewee, ‘festivals are the most powerful embodiment of local cultures’.⁵⁴

51 / Mengran Li, UTour [Interview] (2019, March)
52 / Bora Shnitman, Israel Tourism Attache in China, Israel Ministry of Tourism [Interview] (2019, April)
53 / Maria Yi Xin, Chief Financial Officer, Tuniu Corp. [Interview] (2019, March); Bora Shnitman, Israel Tourism Attache in China, Israel Ministry of Tourism [Interview] (2019, April)

Figure 26. Words frequently mentioned in online Chinese travel-related discussions of festivals.



54 / Mengran Li, UTour [Interview] (2019, March)

COMPANIES INTERVIEWED FOR THIS CHAPTER

China Travel Service Head Office Co.,Ltd.

China Travel Service Head Office Co.,Ltd. is one of the largest state-owned travel agencies in China, with presence in all cities in the country as well as 15 countries across the world. The annual turnover of CTS Travel Division exceeds RMB15 billion. The company’s product line of 70 offerings served 500 travellers in 2018, generating revenue of RMB15 million.

Israel Ministry of Tourism

Israel combines modernity and innovation with thousands of years’ old tradition and history. One may enjoy great variety of attraction, enjoy comfortable Mediterranean weather, historic and cultural attractions of ancient cities, young and vibrant atmosphere of Tel Aviv, serenity of Negev desert and the uniqueness of the Dead Sea. IGTO China welcomes our Chinese friends to visit Israel for tourism, education and endless business opportunities.

UTour Group Co., Ltd.

As one of the leading outbound travel operators in China, Utour is mainly engaged in outbound tourism wholesale, outbound tourism retail and integrated marketing service. It has strong competitive advantages in long-haul outbound tourism in Europe, Oceania, Africa and America, and short-haul outbound tourism in Asia. The company has expanded from outbound travel to domestic travel, “tourism+” outbound services and further to a wide range of travel and general services including domestic tours, high-end tourism, study tours, immigration, real estate, tourism finance and healthcare.

Tuniu

Tuniu (Nasdaq:TOUR) is a leading online leisure travel company in China that offers a large selection of packaged tours, including organized and self-guided tours, as well as travel-related services for leisure travelers through its website tuniu.com and mobile platform. Tuniu has over 2,200,000 stock keeping units (SKUs) of packaged tours, covering over 420 departing cities throughout China and all popular destinations worldwide.

KEY TAKE-AWAYS

- Travel industry experts agree that there is a higher demand for trip **personalisation** from Chinese travellers, in the forms of both **diversification** (more niche and themed travel products) and **customization** (tailoring to individual preferences).
- Travelling in 2019-2020 is all about experiences, but **not the same experiences attract all travellers**. Two key scales on which the covered travel themes differ are 'chilling' (relaxing) to 'thrilling' (high-adrenaline) activities and feeling 'connected' (immersed in the local culture) to 'disconnect-ed' (e.g. on a secluded island).
- **Experiences related to local culture** are highly sought after by travellers, not only for culture-themed trips. **Framing of an activity as a way to immerse oneself** in the local culture can be a selling point for many kinds of activities.
- The survey by ITB China Buyers Circle indicates that of all travel theme categories, travellers are **most willing to pay for culture** travel, which also happens to be the **fastest-growing** theme.
- The survey also indicates that **adventure travel** is the theme for which the demand for **trip customisation** is highest.
- A **strengthened quality focus** is seen in all covered themes, from a demand for higher-comfort hotels on island destinations to more authentic local experiences during culture trips.
- **Chinese-speaking guides** and other language services continue to be in high demand, not least for culture travellers who are typically older than others. This is seen as a form of upgraded services of high-quality tours.
- **The stories of a place** are an asset that can be leveraged for attracting travellers looking to connect to the local culture.
- Many travellers looking for highly **challenging activities** – not least during 'thrilling' adventure trips – at the same time feel insecure due to **safety concerns** or **lack of experience**. This translates into a market for education and guiding services, as well as for tour packages that include a large share of the equipment needed for an activity.
- **Events** are important, especially for sports and culture trips. Interviewed industry experts emphasize that events should ideally be combined with other activities at, or around, the destination to create a richer travel experience. This means opportunities for providers of all sorts of travel products that can be connected to a nearby event in the fields of culture, sports, or something else.
- **Media exposure** is key for raising awareness of new destinations among travellers, no matter whether it's through film, TV, or social media. The case of the Indonesian destination Manado, which became famous among Chinese travellers after being featured in the film 'The Ex-File 3', is an illuminating example.
- **Global stars** are key to attracting Chinese travellers to sports tours. In a somewhat similar way, the involvement of **experts and 'opinion leaders'** in product development can also help sell culture trips.