



**Dragon Trail**  
INTERACTIVE



# Winning China's Young Travelers

**Dragon Trail Interactive**

Sienna Parulis-Cook | STAY WYSE Amsterdam

# Dragon Trail Interactive

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Dragon Trail Interactive is an award-winning digital marketing and solutions agency **helping travel and tourism organizations to reach and connect with China's affluent consumers online.**

We combine our deep market knowledge, extensive industry relations and the diverse skill set of our multi-cultural and multi-lingual team to deliver innovative solutions and excellent service.

Founded in 2009, the company has offices in Beijing, Shanghai, Xi'an, London, and Lexington.

We are proud to work with major international brands, such as Los Angeles Tourism and Convention Board, PromPeru, Visit Sweden, Air France, Small Luxury Hotels of the World, Leading Hotels of the World, and Riu Hotels & Resorts.



100% China



100% Travel



100% Digital





## Agenda

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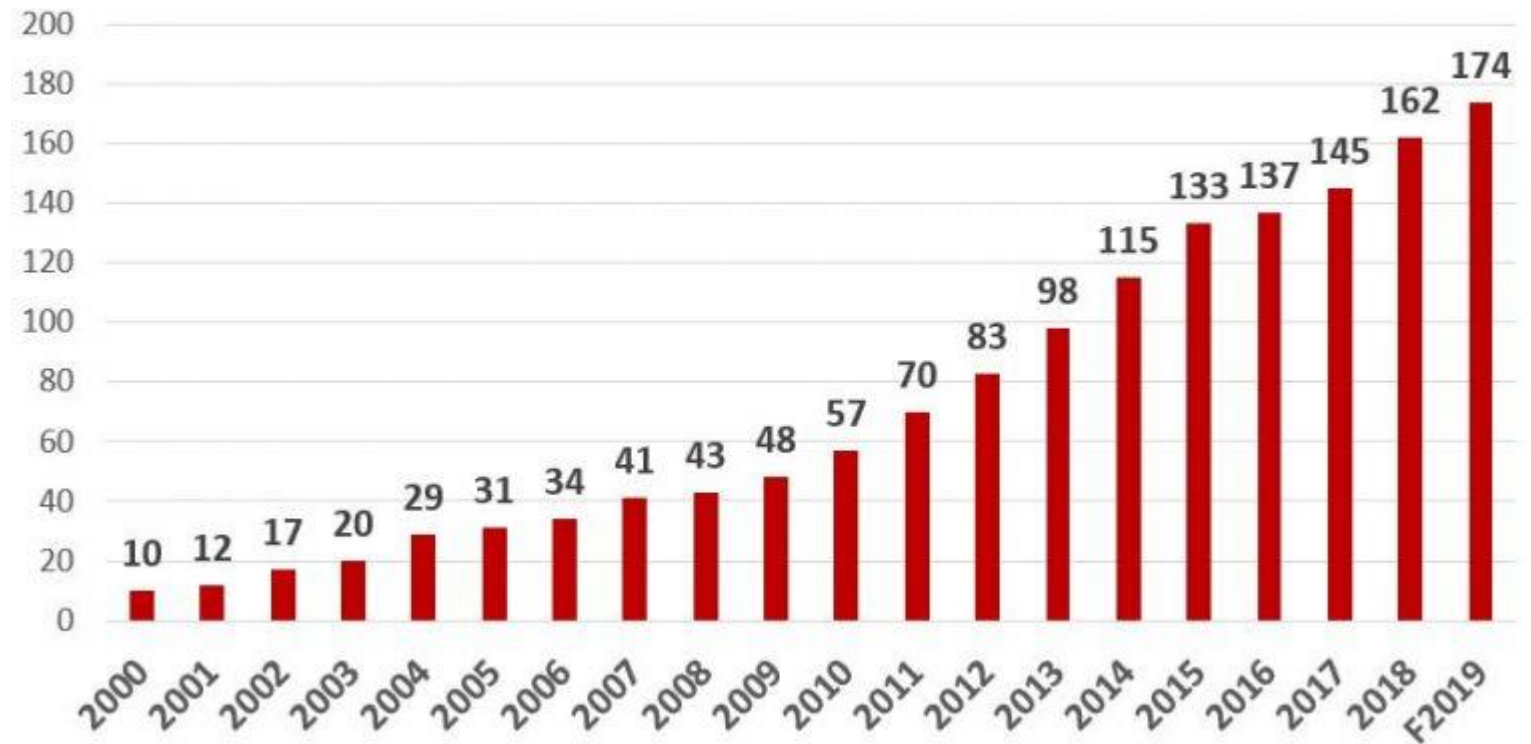
- Chinese outbound tourism: Why is it important?
- What's different about young Chinese travelers?
- Top digital platforms for young Chinese
- Accommodation preferences for China's young travelers

# Chinese Outbound Tourism: Overview

China has been **the world's largest outbound tourism market** by number of trips since 2016, and by spending since 2012.

The China Tourism Academy forecasted **168 million trips in 2019** – a 12% growth from 2018. As of H1 2019, outbound trips had reached 81.3 million.

### Border Crossings from Mainland China in Millions

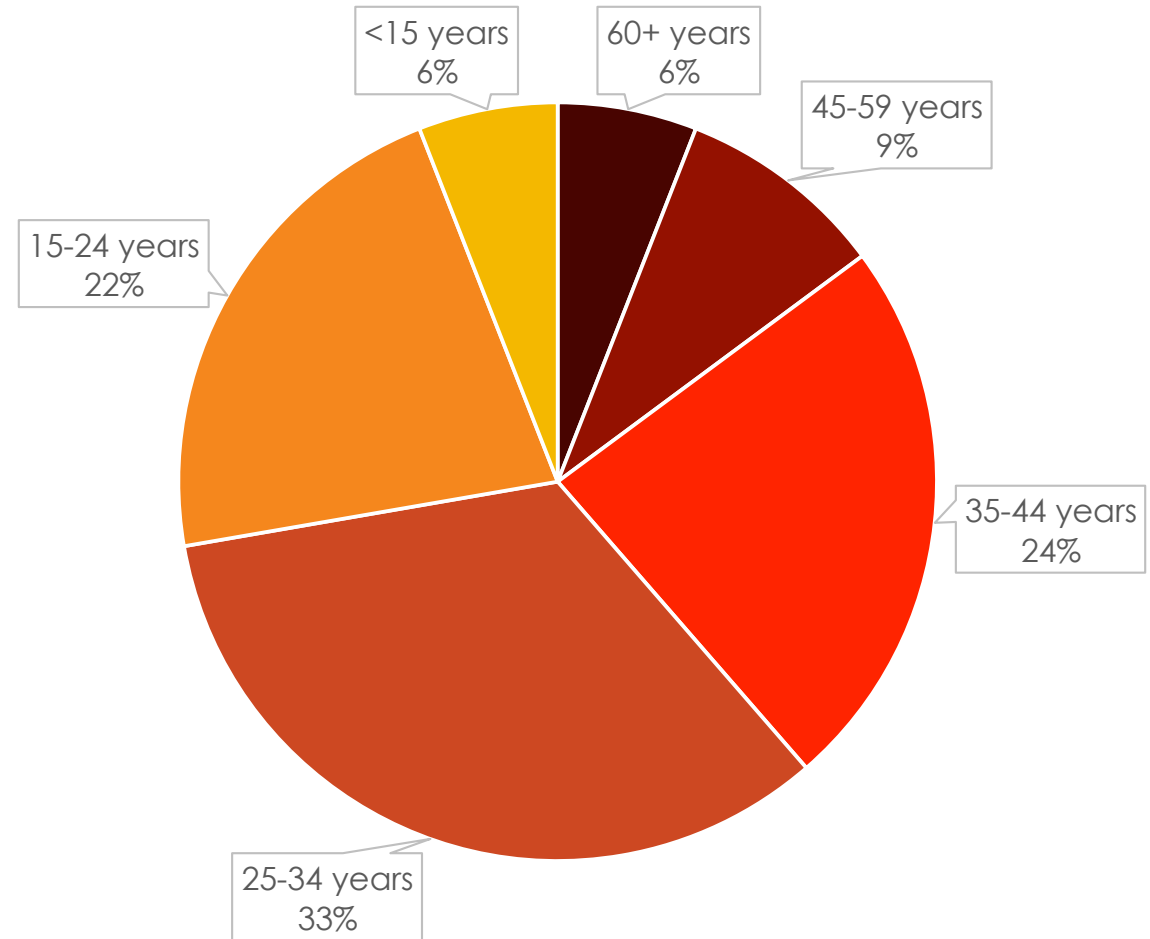


Source: COTRI

# Chinese Outbound Tourism: Age Demographics

- According to Chinese travel website Mafengwo, 60% of outbound travelers in 2019 were under the age of 35 (born after 1985).
- 67% of all Chinese OTA users were born in the 1980s and 1990s. They travel abroad an average of 3.8 times per year. (Fastdata)
- China Tourism Academy data shows that 55% of Chinese outbound travelers in 2018 were aged between 15-34 years.

Chinese Outbound Tourists by Age



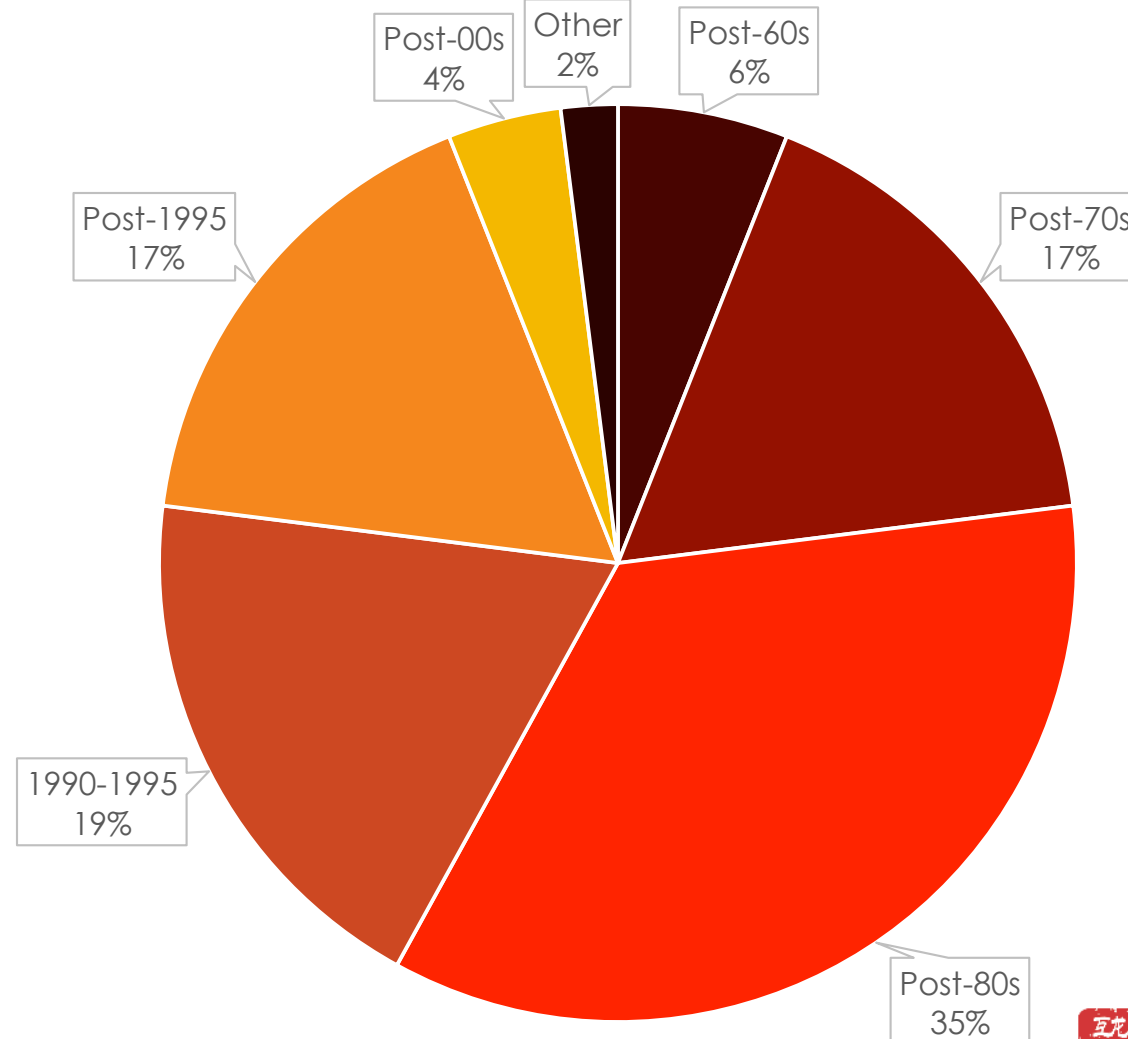
Source: China Tourism Academy/Data Center of Ministry of Culture and Tourism, 2019

# Chinese Outbound Tourism: Age Demographics

Data up until 2018 shows that Chinese travelers born in the 1980s make up the largest generational segment, and biggest spenders. But 2019 marked the first year when post-90s surpassed post-80s on OTA Ctrip, making up 36% of total users compared to 35% post-80s.

- Post-00s: 10-20
- Post-95s: 21-25
- Post-90s: 26-30
- Post-80s: 31-40
- Post-70s: 41-50
- Post-60s: 51-60

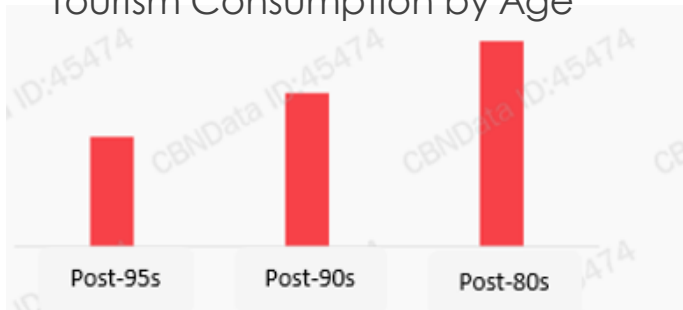
### Chinese Outbound Travelers in 2019: Ctrip



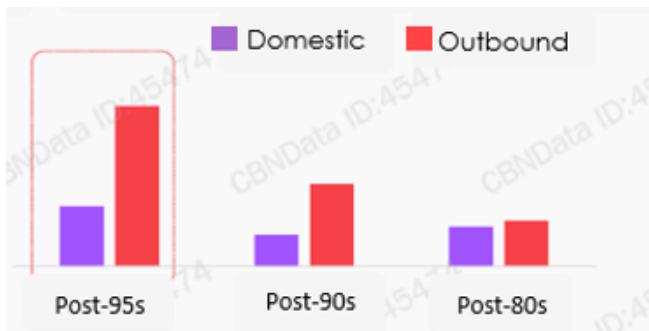
# Chinese Youth Tourism: Growth Rate

China's youngest travelers are the fastest-growing group by age.

### 2018 Per Capital Outbound Tourism Consumption by Age

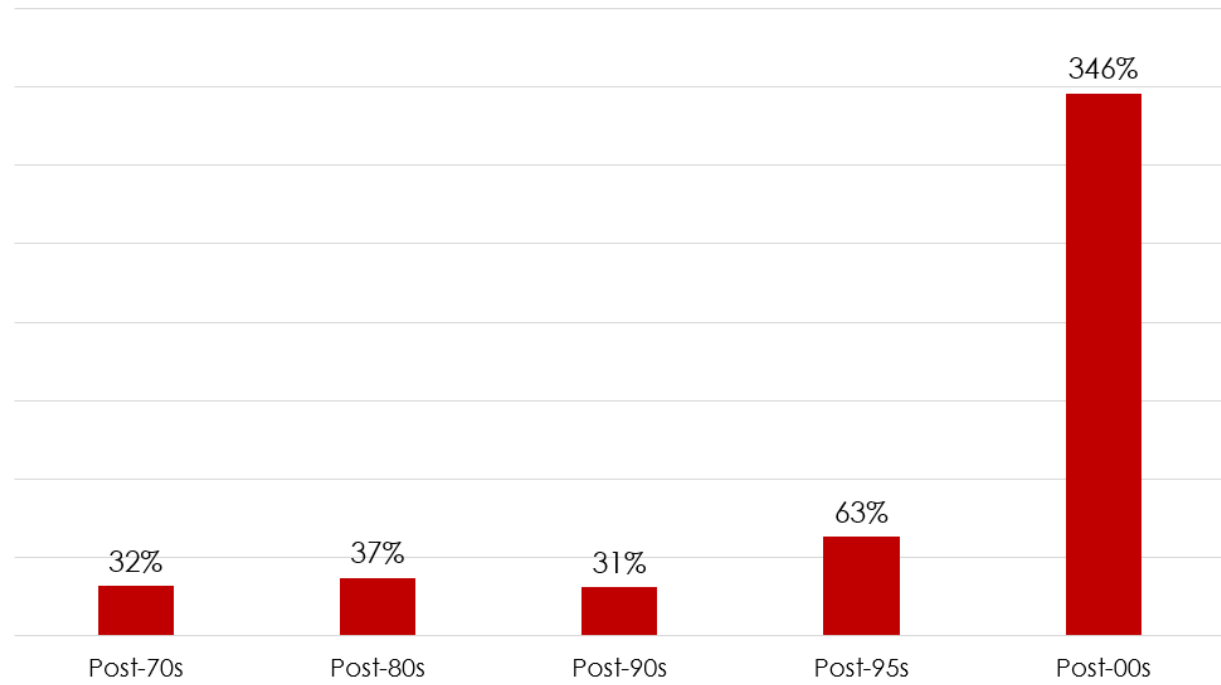


### 2018 Tourists' Growth Rate by Age



Source: CBNDData and Fliggy, 2018

### Y-o-Y Growth Rate of Outbound Tourists from China Summer 2019



Source: Fliggy and Alibaba, 2019



# Chinese Students Abroad

- **UK:** 120,000+ Chinese students, 26% of total foreign students, no. 1 source country
- **USA:** 360,000+ Chinese students in 2018, 30% of total foreign students, no. 1 source country
- **Canada:** 143,000 Chinese students in 2018, 25% of total foreign students, no. 2 source country

## Why are Chinese students important for tourism?

- Regional travel
- Travel with visiting friends and relatives
- Long-term ambassadors

**Edinburgh:** Europe's no. 1 regional or municipal tourism board account on WeChat in 2019; no. 10 in the world

爱丁堡旅游

Zoe :  
2017年毕业 | 上海 | UX

“在当时毕业时未来有点困惑，在工作赚钱和继续深造（花钱）之间犹豫。最开心的回忆是抱着一瓶热好的红酒，夜晚爬到卡尔顿山上看海看灯火。

一直存钱想要回去呢，也一直和爱宝的当地朋友邮件联系。如果有机会回来，肯定先顺着 Royal Mile 一路走到朋友的旧书店，再经过 castle，一路走进 ECA 的 studio，找我们的导师 Arno 聊天，看看他的胡子现在有多长了。”



© iamAllison\_

Hayae :  
2018年毕业 | 北京 | 交互设计

“很妙的是当我想起爱宝，除了想念这座迷人城市、想念曾经和朋友们学习生活过的时光、想念每一个我有交集或曾擦肩而过的人们，突然发现机场竟也是承载我无数美好回忆与期待的地方。”

爱丁堡旅游



© UoEArtColl/ 一颗火柴

其实我也很想念。

那家下课后我们常去吃的中餐厅换了新的装潢，也换了新的菜单，但我还是最喜欢那个窗边我们一起坐过的狭窄的小桌子。一起去看海时我们蹦跳着拍照的样子，现在想起来也很好笑。

还有，最近也有很好看的彩虹出现过哦。



# What's Different About Young Chinese Travelers?

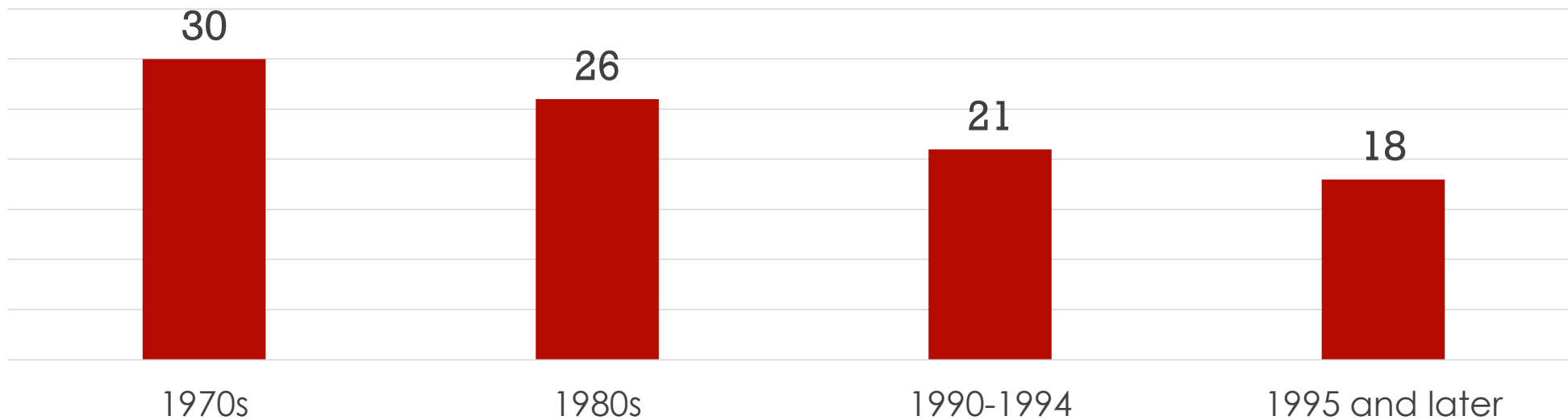


# Traveling Younger

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The younger the generation, the earlier they travel abroad.

## Average Age of First Trip Abroad, by Generation

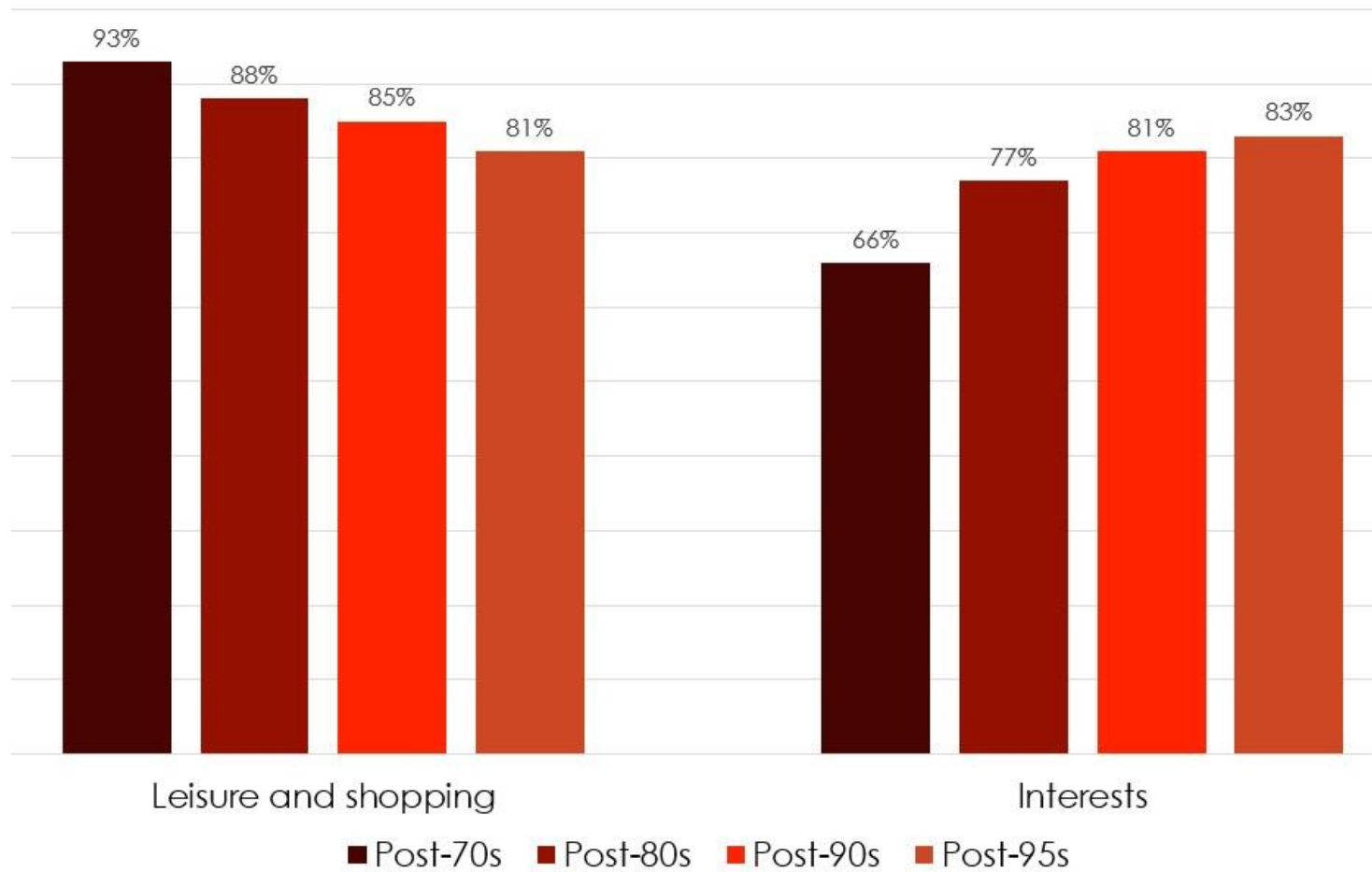


(Source: Mafengwo)



# Travel Goals

## Chinese Tourists: Purpose of Outbound Travel by Age Group

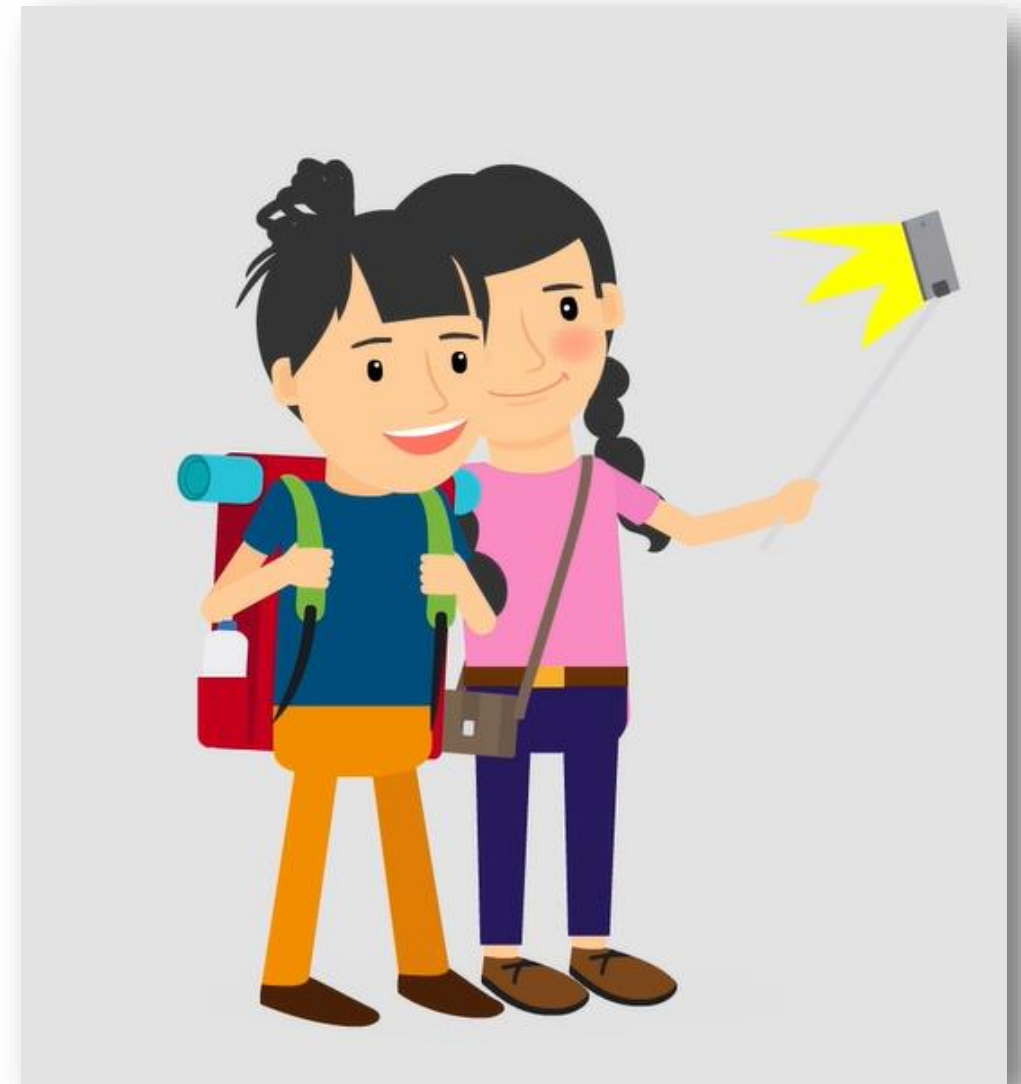


Source: CBNData and Fliggy, 2018

## Why Do They Travel?

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- Unlike for older generations, outbound **travel is seen as a necessity** and important part of their lifestyle, rather than a luxury.
- Young travelers **express their individualism** through visiting niche travel destinations and making unique local purchases.
- The purpose of travel is to **learn about the world and themselves**, and express themselves, but they are also **strongly influenced** by KOLs (key opinion leaders) and trends.
- Sharing experiences on **social media** while traveling abroad helps them to define their identities.

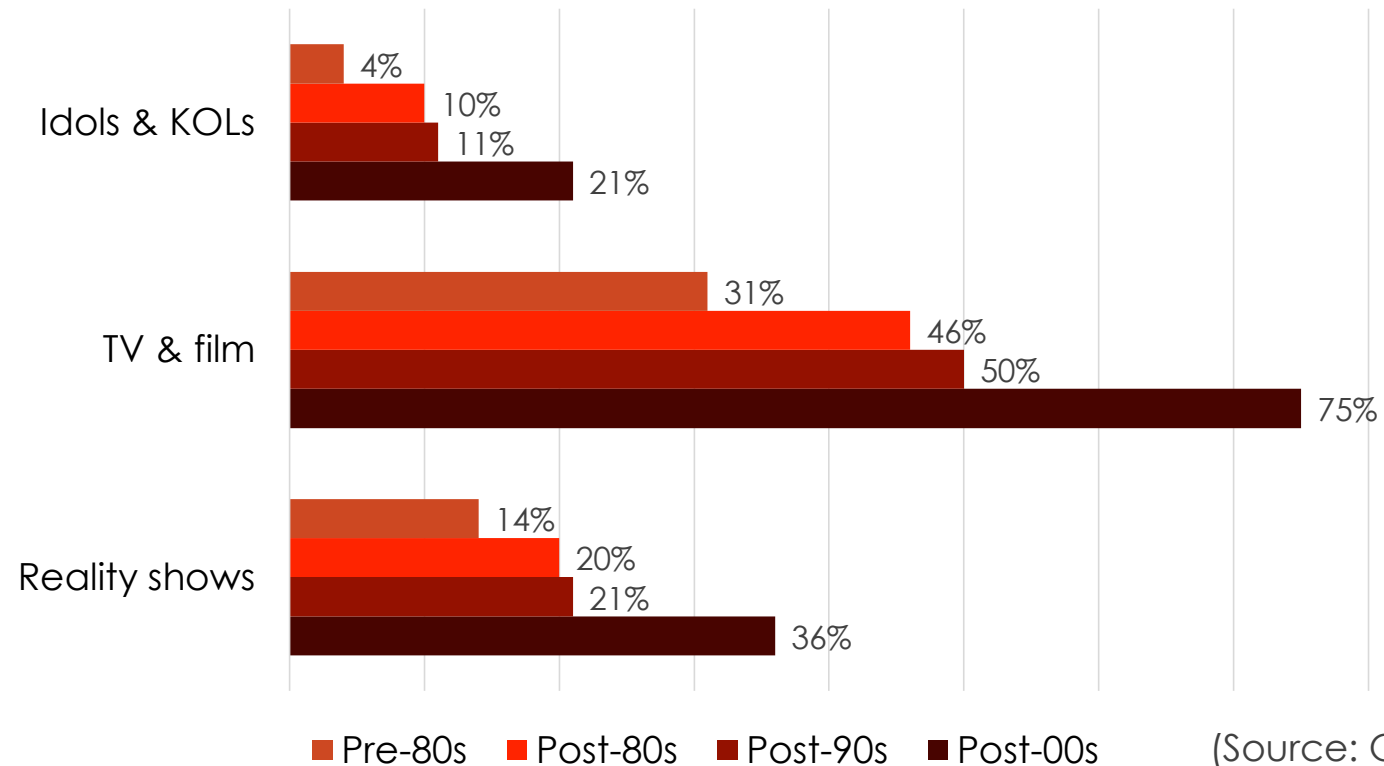




# Travel Inspiration and Influences: Chinese Travelers

Post-90s Chinese are more likely to be influenced by social media than online travel websites, compared to other generations. They are also more likely to travel based on interests related to celebrities and film. (CBNData+Fliggy, 2018)

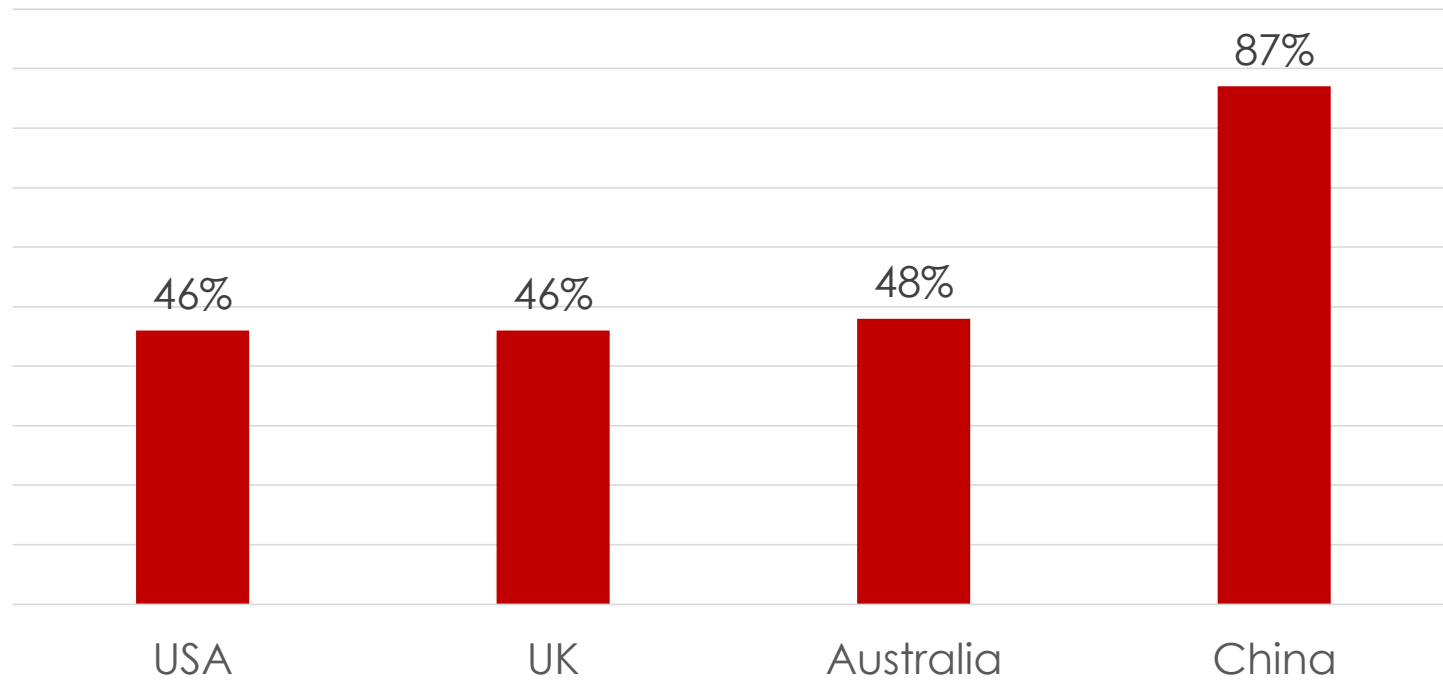
### Sources of Travel Inspiration by Age Group



(Source: Qyer, 2018)

# Travel Inspiration and Influences: Chinese vs. Westerners

Do you follow any travel-related accounts or influencers on social media? (% Yes)



(Source: Skift, 2019)

Top 3 Platforms for Millennials/Gen-Z to Follow Travel-Related Accounts or Influencers	
USA	Instagram: 72% Facebook: 49% YouTube: 35%
UK	Instagram: 67% Facebook: 44% YouTube: 32%
Australia	Instagram: 80% Facebook: 51% YouTube: 33%
China	Weibo: 65% WeChat: 63% Douyin: 49%

# How Do They Travel?

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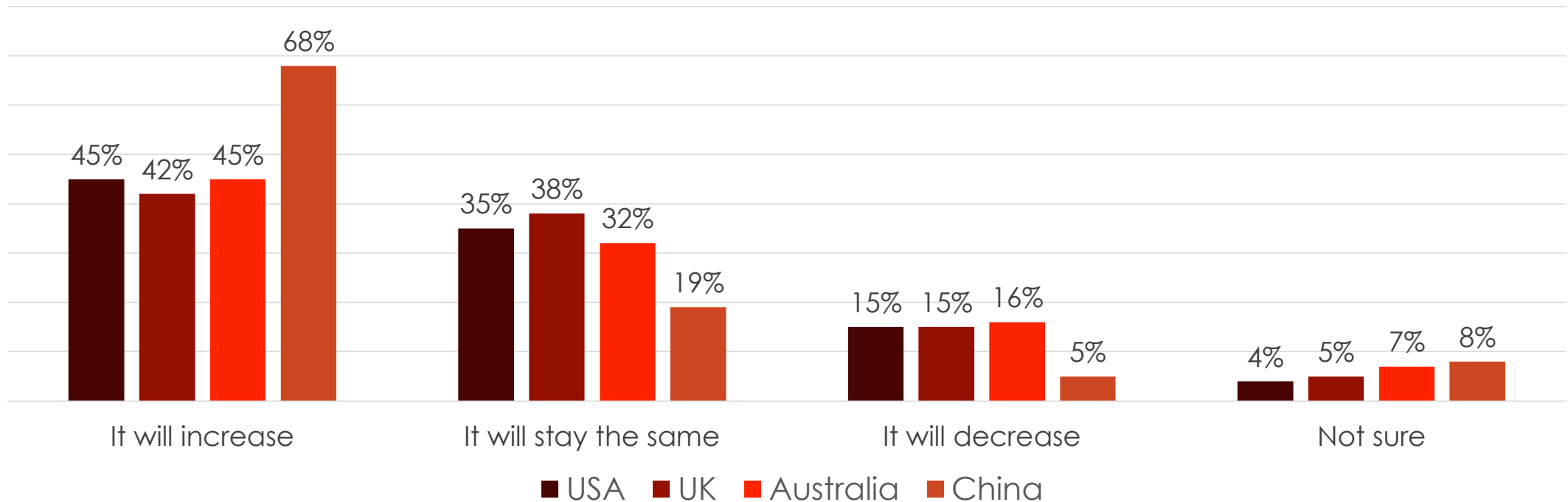
- Post-90s and 95s are more likely to visit **niche destinations** than other generations. For outbound trips, post-95s in particular are more likely to visit **surrounding towns and cities**. (CBNData+Fliggy, 2018)
- While Europe is traditionally an older market, COTRI Analytics found that in 2018, 32% of the Chinese travelers to both **France and Italy** were under 30.
- Post-80s are more likely to be married and prefer to book package tours through travel websites. With less financial pressure and more time for travel, post-90s opt for **personalized tours and self-guided tours**. They prefer smaller tour groups with friends, classmates and colleagues. (WTCF+Ipsos, 2018)



# Travel Consumption: China vs. Westerners

Thanks to more family financial support and no student debt, Chinese in their 20s tend to have more disposable income.

How do you think your spending on travel will change in the next year, compared to the previous year?



(Source: Skift, 2019)



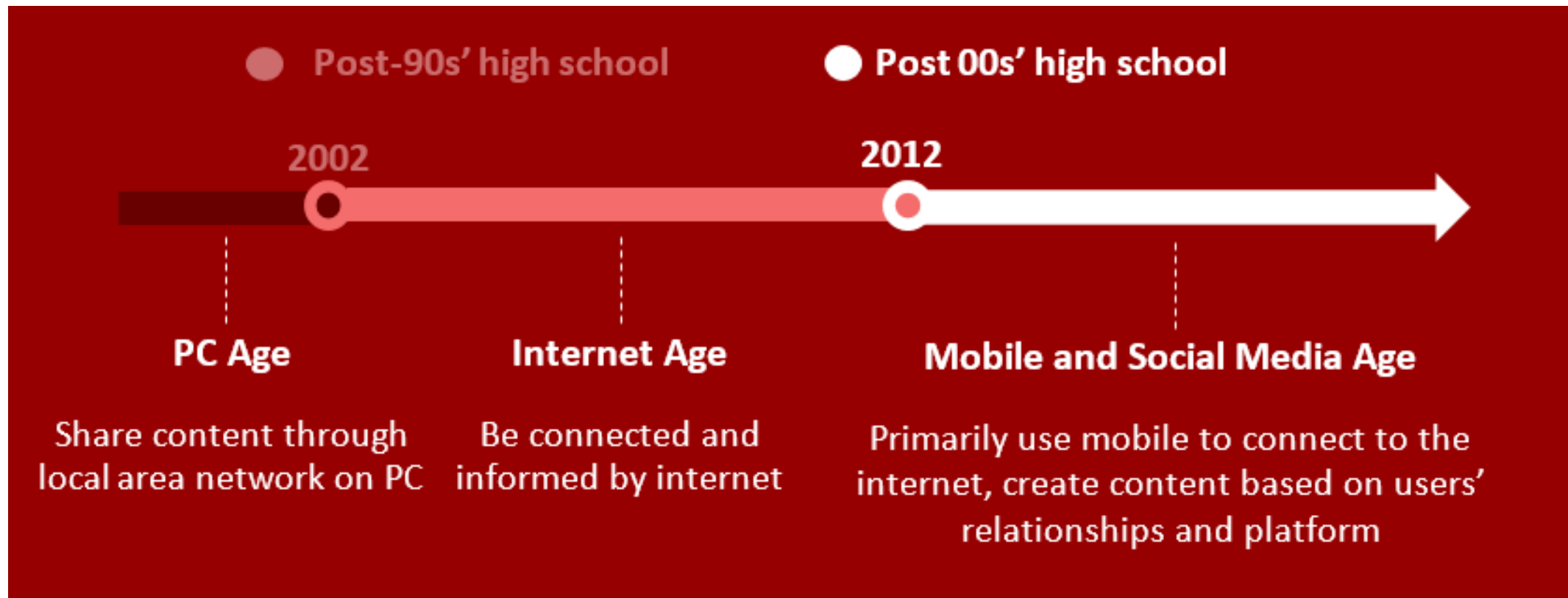


## Top Digital Platforms for Young Chinese

# Digital Natives, Mobile First

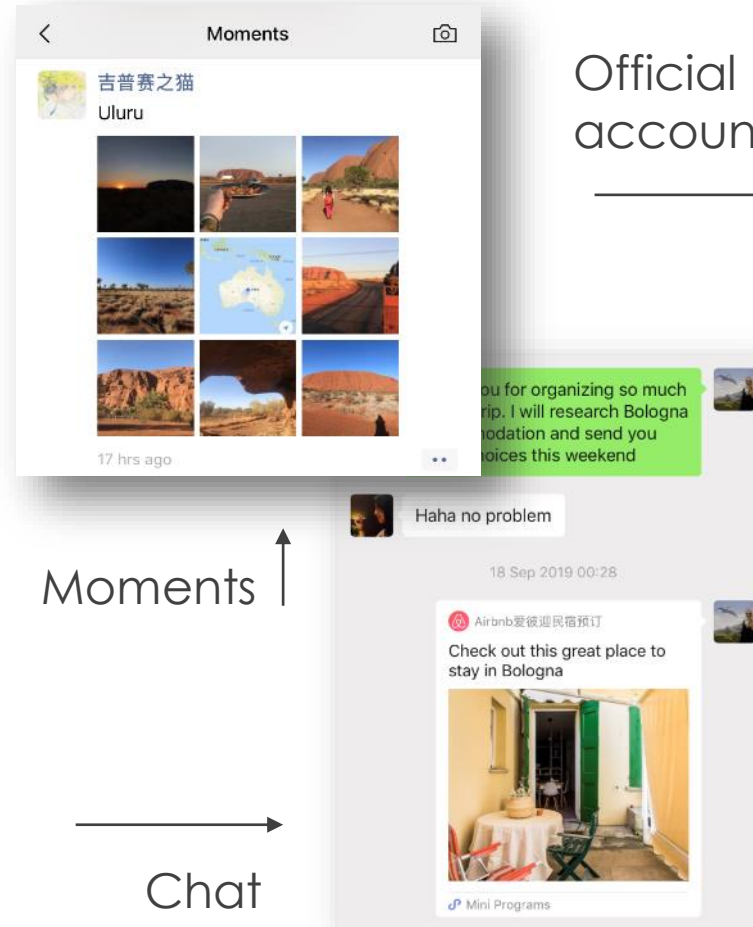
The younger the traveler, the more comfortable they will be using digital resources.

As of June 2019, 99.1% of Chinese internet users get online through a mobile device.



# WeChat

- WeChat is China's most-used social media platform, with 1.15 billion monthly active users.
- In 2015, 86.2% of WeChat users were between 18-35.
- While WeChat – like Facebook – is not as cool anymore for the youngest web users, it's an essential communication tool and still a must-have platform for travel marketing.



Official accounts

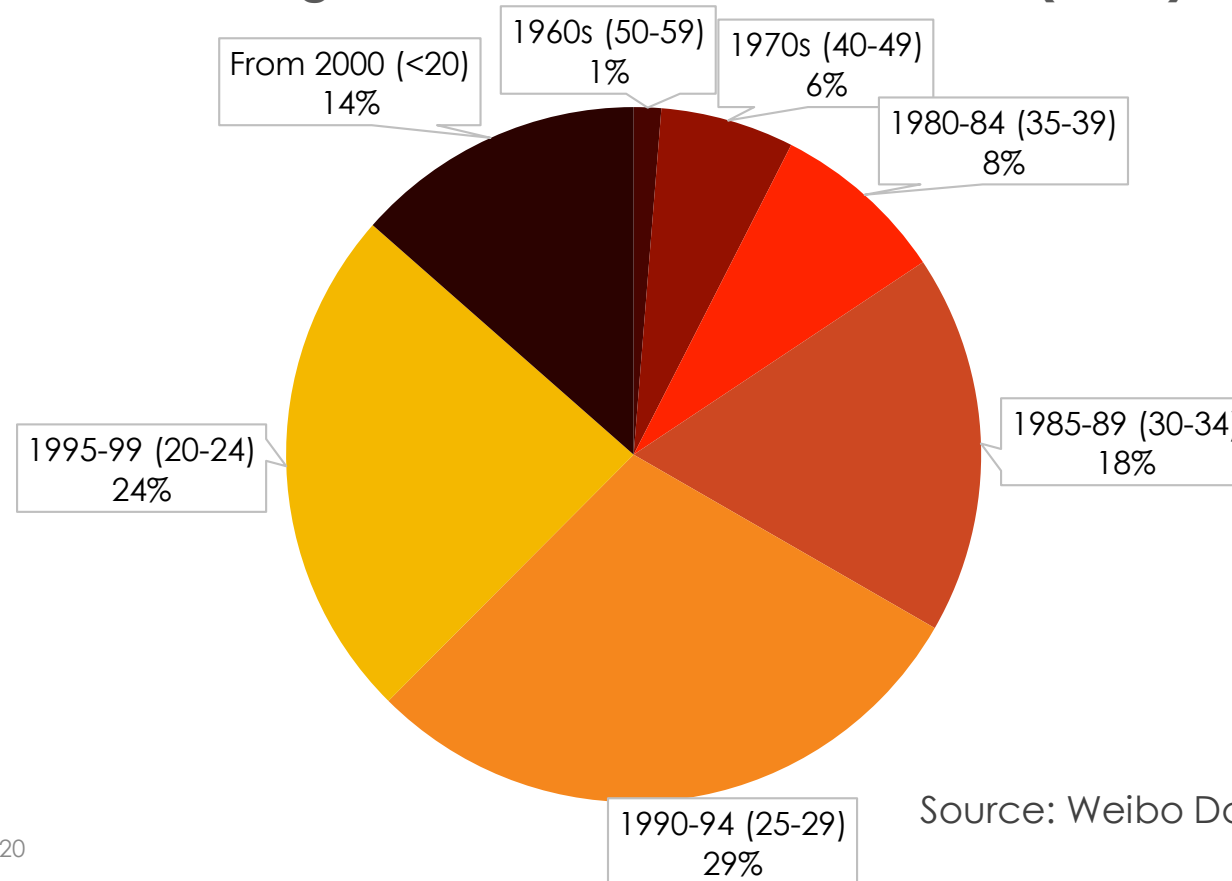


# Sina Weibo

Micro-blogging platform Weibo has made a comeback in recent years, in part because of its popularity with younger users.

In 2018, 67% of Weibo users interested in travel were under the age of 30.

**Weibo: Age of Users Interested in Travel (2018)**



Source: Weibo Data Center



# Sina Weibo

## What works well:

- Celebrity/KOL collaborations
- Short videos
- Encouraging UCG
- Giveaways
- Questions
- Hashtags
- Emojis
- Visually engaging imagery/layouts



# Short Video: Douyin and More

- As of November 2018, 72% of post-95s open Douyin every day, and 32% spend more than an hour a day on the platform
- In Q3 2019, short video had a 70% penetration rate for all Chinese internet users.
- Popular short platforms include: Douyin, Weibo/Miaopai, WeChat, Bilibili, and Kuaishou. A multi-channel approach is encouraged for marketing, as short videos can be shared on all leading Chinese social media.



WeChat



Weibo



Douyin



# Xiaohongshu and Oasis: Aspirational Lifestyle Apps



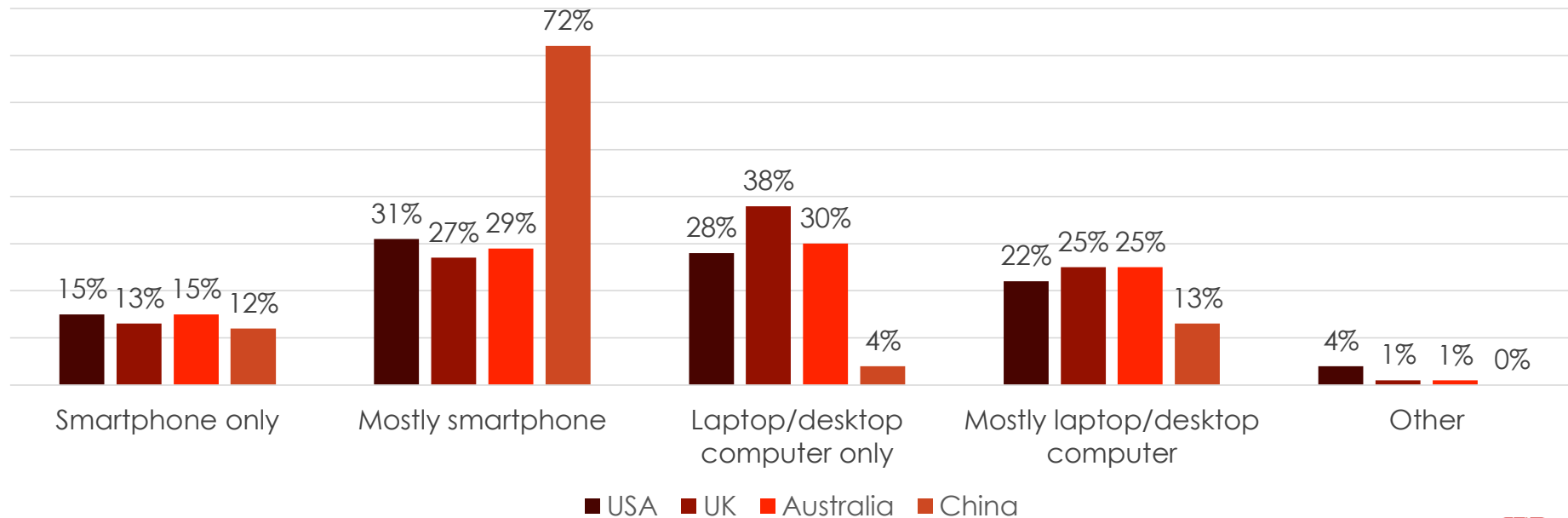
Xiaohongshu/Little Red Book/RED

Oasis/Lüzhōu

# Booking

- Younger travelers are more tech-savvy and willing to do independent booking – this also shows off their individuality and capabilities.
- Both post-80s and post-90s prefer to use OTAs to search for travel information. These generations are also most likely to use WeChat mini-programs and apps for travel. (WTCF+Ipsos, 2018)

What device do you most often use when booking air travel online?



(Source: Skift, 2019)





## Accommodation Preferences for China's Young Travelers

## Local Variety

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Percentage of millennials who say the following is an important driver in their choice of accommodation when they travel:

	US	UK	China
Good selection of locations/variety of areas	90%	87%	94%
Offers opportunities to experience local culture	85%	86%	92%
Provides opportunities to meet people from the area	73%	71%	86%
Makes me feel part of the local community	78%	69%	86%

Source: Airbnb, 2016

# Photo-Friendly Spaces

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- According to a 2018 report by CBNDData and Airbnb, millennials (post-80s and 90s) favor Airbnb properties that are internet-famous (*wanghong zhusu*, “网红住宿”).
- From 2017 to 2019, bookings for Airbnbs with keywords such as “Douyin” and “INS” (Instagram) increased over 10-fold.



The Mushroom Dome, USA



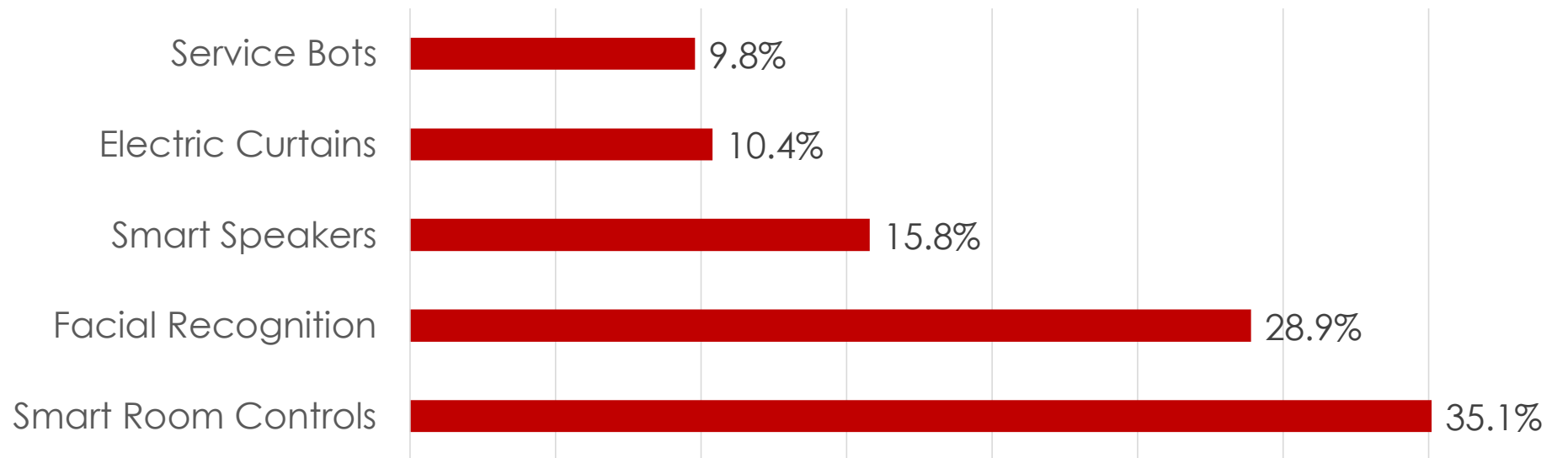
The Spice Bus, UK

## Low-Tech Experiences

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Chinese millennials may be tech savvy, but in-room technology is not important for them. According to a 2019 survey, Gen X Chinese travelers were more interested in smart room controls and facial recognition than millennials. Millennials showed a higher preference for smart speakers than older generations, but less than 16% were interested in this technology.

### Hotel Technology: Interest Among Chinese Millennials



(Source: Shimao Star Group, 2019)



## Amenities and Extras

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Millennials, particularly post-80s, like to indulge themselves while on vacation. They are willing to pay for comfort, as well as local specialty products.

- Post-90s spend the most on in-house hotel services, followed by post-80s.
- Millennials are more willing to pay for specialty products and experiences than Gen X, including beverages (coffee, local craft beers etc.) and cosmetics (face masks and makeup remover).
- Airbnbs with specialty amenities, like projectors, bathtubs, pets, and game consoles, generate increased interest from millennials.

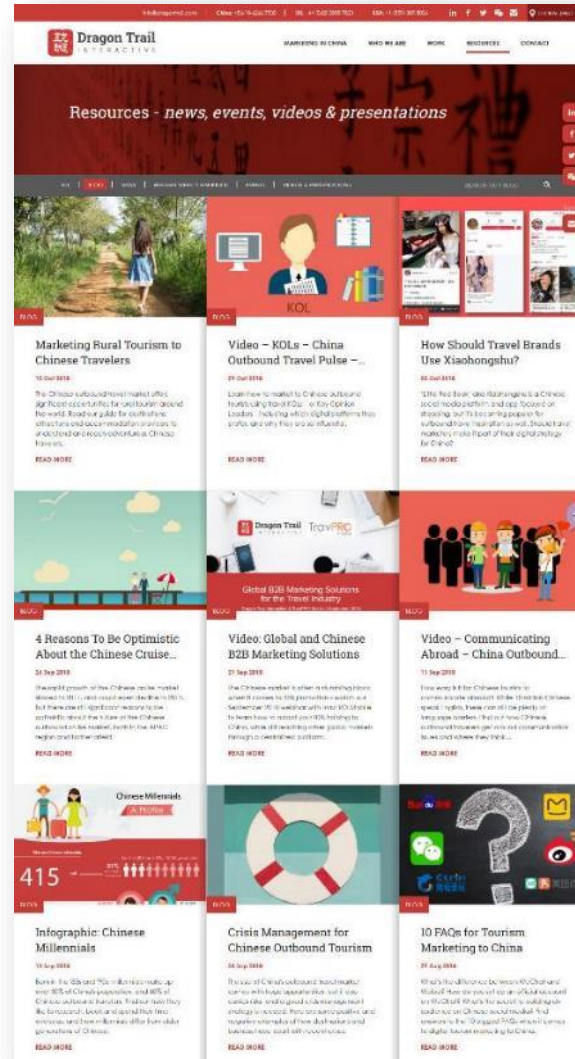




# Learn More

Visit [www.dragontrail.com](http://www.dragontrail.com) for information on the latest trends in Chinese outbound travel and digital marketing, watch the China Outbound Travel Pulse video series, sign up for our monthly webinar and newsletter, follow our weekly WeChat and Weibo rankings, and more.

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