



Impact of COVID-19 on Travel - China - October 2020

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This report looks at the following areas:

- Market overview so far and recovery outlook
- Future demand for various types of travel, including both domestic and outbound
- Consumers' future travel preferences, such as ways to travel (eg customised tours, group tours) and destinations
- Attitudes towards travel budget and how to control travel spending
- Key travel trends to watch in the post-COVID market

Overall, the travel market recovery is mainly powered by domestic local trips such as city tours and suburb tours at the time of writing. As consumers show high willingness to adopt various types of travel, including both domestic and outbound, the market will see robust demand once the outbreak is fully under control and all restrictions are relaxed.

Recovery of key sub-markets and individual players is mainly determined by how they balance between the domestic and outbound segment. Accommodation, which mainly sources consumers from domestic travel, recovered faster than the other sectors (eg airlines, offline travel agencies, cruises).

The travel market after COVID-19 will become more consumer-driven. Several key holiday trends will shape how people take part in travel in the future: Consumers will increasingly appreciate quality travel experiences. Even if the budget is tight, consumers will not compromise the quality standards of travel experiences. Although available in the market for a while, this is the right moment to promote customised products. Wellness will also become more persuasive as a motivation for holidays. Travelling for emotional wellbeing (eg relaxation, energy restoration) will offer new ways to interpret wellness. Particularly, addressing issues of loneliness will help capture GenZ consumers, who are more vulnerable to the feeling of loneliness.



"Market recovery has been supported by domestic local travel so far. The strong willingness to adopt various types of travel, including domestic and outbound, in the near future suggests robust demand for further recovery. The travel market will become more consumer-driven after COVID-19. People want to experience quality travel. "

- Saskia Zhao, Senior Research Analyst

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Table of Contents

OVERVIEW

- **What you need to know**
- **Key issues covered in this Report**
- **Report scope**

EXECUTIVE SUMMARY

- **The market**
Figure 1: Total travel volume in China, 2015-20 (est)
- **Significant drop of travellers in 2020 even though market is recovering**
Figure 2: Travellers' volume at key holiday time, 2019 vs 2020
- **Recovery backed by domestic local travel so far**
Figure 3: Summary of impact of COVID-19 on travel, domestic and outbound segments, Oct 2020
- **Demand stays robust to support further recovery**
- **Better personal finance motivates travel participation**
- **Strong association with a healthy lifestyle makes traveling a priority**
- **Supply-side adopts various actions to inject confidence**
- **Future outlook**
Figure 4: Past and future travel participation, August 2020
- **The consumer**
- **Strong willingness to travel in the future powers market recovery**
Figure 5: Desired ways of travel in the future, August 2020
- **More personalised travelling wanted**
Figure 6: Anticipated domestic travel destination, word cloud and ranking, August 2020
- **Top cited domestic destinations remain unchanged**
Figure 7: Desired travel activities for future trips, August 2020
- **Shopping more preferred in outbound travel than domestic**
Figure 8: Ways to control travel budget, August 2020
- **Consumers want travel of good quality**
- **Travel is closely associated with healthy lifestyle**
Figure 9: Attitudes towards Travel, August 2020
- **What we think**

ISSUES AND INSIGHTS

- **Emerging travel trends after COVID-19: quality, personalisation and emotional well-being**
- **The facts**
- **The implications**

What's included

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- **Lifting travel spend via addressing multi-dimensional needs under “emotional wellbeing”**
- **The facts**
- **The implications**
- **Recovery outlook for key sub-markets**
- **The facts**
- **The implications**

THE MARKET – WHAT YOU NEED TO KNOW

- **Big drop in travel volume in 2020**
- **Robust consumer enthusiasm towards travelling will support further recovery**
- **Improved personal finance makes people more confident to spend on travel**
- **Market players adopt various measures to encourage travel**

MARKET OVERVIEW

- **Sharp drop in travel volume**

Figure 10: Total travel volume in China, in million, 2015-20 (est)

- **Recovery fuelled by domestic local leisure trips**

Figure 11: Domestic travel volume during key national holiday times in China, 2019-20

- **Recovery outlook**

- **Domestic and outbound segments**

Figure 12: Summary of impact of COVID-19 on travel, domestic and outbound segments, Oct 2020

IMPACT ON KEY SUB-MARKETS

- **Domestic leisure travel drives accommodation recovery**

Figure 13: Occupancy rate of selected hotels, first quarter, 2020

- **Air passenger volume slowly recovers**

Figure 14: Percentage share of air passengers in domestic and outbound segments, 2019

Figure 15: Domestic air passenger volume, by month, 2019-20

- **Travel agencies hit by group tours being deprioritised**

- **Outbound cruises still have market opportunities once sailing again**

DRIVERS FOR RECOVERY

- **High willingness to travel**

Figure 16: Top five things consumers desire to do when the current social distancing measures are relaxed, May and September 2020

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- **Personal finance rebounds**

Figure 17: Changes of personal finance, March, June and September 2020

- **Relaxed travel restrictions**

- **Enhanced hygiene practice injects confidence to the market**

Figure 18: Reasons not to travel, May and August 2020

Figure 19: hygiene measures adopted by leading hospitality groups

- **Promotional offerings encourage travelling**

Figure 20: Flight pass products, 2020

Figure 21: Promotional campaigns launched by leading hotel brands in China, 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

Previous editions

THE CONSUMER – WHAT YOU NEED TO KNOW

- **Domestic segment recovery till now driven by local leisure trips**
- **Strong willingness to resume longer-distance travel supporting future recovery**
- **Higher quality expectation after COVID-19**
- **Personalisation appreciated after COVID-19**
- **Wellness motivates travelling**
- **Gaining knowledge more desired than luxurious experiences**

TRAVEL PARTICIPATION

- **Future recovery needs to promote domestic short-haul and long-haul leisure travel**

Figure 22: Past and future travel participation, August 2020

- **Local leisure trips enjoyed by all generations**

Figure 23: Participation of domestic local leisure trips during Feb-Aug 2020, by age, August 2020

- **Families with children will further drive the recovery of domestic short-haul leisure travel**

Figure 24: Participation of domestic leisure short-haul trips* during Feb-Aug 2020, by age, August 2020

Figure 25: Participation of domestic leisure short-haul trips*, by family structure, August 2020

- **Young people lead domestic long-haul's recovery, whilst families with children remain important**

Figure 26: Participation of domestic leisure long-haul trips* during Feb-Aug 2020, by demographic, August 2020

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Figure 27: Intended participation of domestic leisure long-haul trips* in the next 12 months, by demographic, August 2020

- **Experienced outbound travellers are key for future recovery**

Figure 28: Intention to travel outbound in the next 12 months, by past travel experiences, August 2020

Figure 29: Mentions for participation in different types of outbound travel in the next 12 months – only participate in one type, August 2020

DESIRED WAYS OF TRAVEL IN FUTURE

- **More personalisation appreciated for future travelling**

Figure 30: Desired ways of travel in the future, August 2020

- **Group tours get smaller in scale**

Figure 31: Comparison of ways to travel among consumers aged 20-49, April 2019 and August 2020

Figure 32: Comparison of ways to travel among seniors aged 50-59, December 2019 and August 2020

- **Use RV-car tours to engage young people**

Figure 33: Interest in travelling with RV-car tours, by demographic, August 2020

Figure 34: Attitude toward new experiences, Dec 2019 and Jul 2020

DOMESTIC DESTINATIONS

- **Most preferred destinations remain the same**

Figure 35: Anticipated domestic travel destination, word cloud and ranking, August 2020

Figure 36: Choose to visit Hainan island for domestic travel, before vs after COVID-19, November 2017 (left) and August 2020 (right)

- **Northwest region is the emerging star**

Figure 37: Livestreaming by Dunhuang Museum during International Museum Day, May 2020

DESIRED TRAVEL ACTIVITIES

- **Domestic segment driven more by attractions than shopping, whilst outbound travel needs both**

Figure 38: Desired travel activities for future trips, August 2020

- **Museum and art galleries target young generations**

Figure 39: Interests in visiting museum or art galleries for future trips, by demographic, August 2020

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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Figure 40: Young people's attitude toward paid knowledge explanation services at tourism attractions, by interests in visiting museum or art galleries for future trips, August 2020

WAYS TO CONTROL TRAVEL BUDGET

- Quality of travel is appreciated**

Figure 41: Ways to control travel budget, August 2020

Figure 42: Ways to control travel budget among specific consumer groups, August 2020

- Income does not significantly impact the pursuit for quality travel**

Figure 43: Ways to control travel budget, by monthly household income, August 2020

- More challenges for paid shows to recover**

Figure 44: Top five actions for travel budget control, by attitudes towards whether it's worth watching paid shows (a) at tourism attractions, August 2020

ATTITUDES TOWARDS TRAVEL

- Position travel as part of healthy lifestyle to reach broader audience**

Figure 45: Attitudes towards travel – positioning, August 2020

Figure 46: Attitude toward travel – positioning, by financial confidence, August 2020

- Gaining knowledge drives future travel experiences**

Figure 47: Attitudes towards travel – experiences, August 2020

- Luxurious travel services need a more specific targeting strategy**

Figure 48: Agree with luxurious experiences being indispensable during leisure travel, by demographic, august 2020

Figure 49: Past travel experiences, by attitudes towards luxurious experiences during leisure travel, August 2020

Figure 50: Preferred domestic travel activities, by attitude toward luxurious experiences during leisure travel, August 2020

- Hygiene protection could evolve into competitive advantage**

Figure 51: Attitudes toward travels – travel operators, August 2020

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Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

Interactive Databook

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Figure 52: Attitudes towards travel – hygiene measures of hotels vs guesthouses/vacation rentals, by monthly household income, August 2020

- **Overseas islands will face competition from domestic islands**

Figure 53: Attitude towards travel – island trips, August 2020

Figure 54: Attitudes towards travel – island trips, by past outbound island travel experiences, August 2020

Figure 55: Willingness to take part in outbound island travel in the next 12 months, by past outbound island travel experiences, August 2020

- **Live streaming attracts female aged 25-39**

Figure 56: Attitude toward travel – live streaming as influencer, August 2020

Figure 57: Attitudes towards travel – live streaming as influence, by age and gender, August 2020

MEET THE MINTROPOLITANS

- **MinTs are active travellers who drive leisure travel recovery**

Figure 58: Past travel participation, by consumer classification, August 2020

Figure 59: Intended travel in the next 12 months, by consumer classification, August 2020

- **MinTs want more personalised and novel ways to travel**

Figure 60: Desired ways of travel in the future, by consumer classification, August 2020

- **MinTs will control travel budget by wisely choosing the tourism activities**

Figure 61: Ways to control travel budget, by consumer classification, August 2020

- **MinTs are potential consumers for travel retail**

Figure 62: Desired travel activities, by consumer classification, August 2020

APPENDIX – METHODOLOGY AND ABBREVIATIONS

- **Methodology**
- **Abbreviations**

What's included

Executive Summary

Full Report PDF

Infographic Overview

Powerpoint Presentation

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