SURVEY REPORT ON CHINESE TOURISTS’ TRAVEL INTENT AFTER THE END OF COVID-19 EPIDEMIC

2020-03-25
The outbreak of a new coronavirus pneumonia epidemic (COVID-19) has suddenly pressed the pause button on the tourism industry in 2020. On January 24, the Ministry of Culture and Tourism of China released “Urgent Notice on Making Every Effort to Prevent and Control the Pneumonia Epidemic of New Coronavirus Infection, and Suspension of Operation Activities of Tourism Enterprises” . Domestic and outbound tourism have been suspended, domestic scenic spots have been closed, and many countries have imposed entry restrictions on Chinese citizens. The demand for tourism disappeared instantly, making the traditional Spring Festival tourism season fall into the “cold winter”. After more than a month of strict prevention and control, China’s epidemic response measures have begun to show positive results. Many provinces and cities have lowered emergency response levels for major public health emergencies and carried out orderly resumption of work and production. Some tourist attractions in China are gradually opening up while putting in place surveillance and control mechanism. With strong preventive and control measures, the epidemic is expected to pass soon, and socioeconomic activities and residents’ lives in China will return to normal.

After the end of the Covid-19 epidemic, will the repressed travel demand surge instantly?
How is the tourist's intention to travel?
Where do tourists choose to travel for relax?
What are the concerns about traveling?

To find answers to questions like above, Ivy Alliance Tourism Consulting, China Comfort Travel Group and Pacific Asia Travel Association cooperated to carry out a market survey, aiming at understanding Chinese tourists’ intent and needs to travel after the end of the epidemic, helping destinations’ tourism departments and tourism enterprises to grasp the market situation in a timely manner so as to prepare in advance for the recovery of the tourist market after the epidemic, and provide tourists with better and more thoughtful travel services and travel products.
1. Structure of Survey Samples

The questionnaire surveyed tourism consumer groups across the country to understand their willingness to travel and travel plans after the epidemic. Tourists surveyed come from 30 Chinese provinces, autonomous regions, and municipalities including Beijing, Shanghai, Tianjin, Chongqing, Guangdong, Hunan, Jiangsu, Sichuan, Henan, Xinjiang, and Inner Mongolia. A total of 1,252 valid questionnaires were collected.

1.1 Gender Structure

Among the tourists who participated in the survey, there are more female tourists than male tourists, accounting for 72% of the respondents. In recent years, with the continuous improvement of women’s social and economic status, and their increasingly strong consumer demand and spending power, women are leading a series of new consumption trends and become new growth points and new momentum for economic development. Women have also become important decision-makers in tourism consumption of many families, and their dominant role in tourism consumption has become increasingly prominent.

1.2 Age Structure

Of the Chinese tourists surveyed, 32% were aged 26-35; 25% were aged 36-45. Young people have become the most important consumer group in China’s tourism market, and they also represent the trend of China’s tourism consumption demand.
1.3 Occupations
Most survey respondents are company employees, accounting for 41%; followed by retirees, accounting for 15%.

2. Travel Intent after the end of the Epidemic

2.1 Travel Intent in 2020
After the epidemic, will people who have stayed at home for months consider going out to travel? 60% of tourists surveyed indicated that they would consider travelling this year if the epidemic of COVID-19 has been effectively controlled at the end of March or in April. Another 27% of the tourists surveyed were on the sidelines and have not decided whether they would travel. 13% of the tourists surveyed expressed that they would have no intention to travel in 2020.

2.2 Factors Deterring the Travel Intent
According to the survey, among various types of concerns that may hinder tourists’ desire of travel after the epidemic is over, worries about travel safety and health ranked the first.
2.3 Potential Travel Plan
Due to the uncertain time of the end of the epidemic, and especially the outbreak and spreading in some foreign countries, many tourists are prudent about the specific travel schedule after the epidemic. 41% of tourists surveyed said they would travel after the epidemic but the exact time was still uncertain. 32% of the tourists surveyed indicated that they have plan to travel during the summer in July and August. Only 12% of the tourists surveyed are going to travel during Labors Day Holiday period. According to the feedback, if the epidemic situation is effectively controlled in April, travel demand in the summer of July and August is expected to be relatively strong.

2.4 Preference on Destinations
After the epidemic, some tourists will also choose to make multiple trips in different forms. In terms of destination selection, 56% of tourists surveyed will choose to travel to other cities or scenic places in the country, and 45% indicate that they will travel abroad.

3. Domestic Travel
3.1 Preferred Ways of Domestic Travel
After the end of the epidemic, if traveling in China, 36% of tourists surveyed would choose to travel independently, 24% of tourists would choose to travel with a tour group, 18% of tourists would choose to travel by car, and 22% choose to travel with friends.

3.2 Preference for Domestic Travel Product
What kind of tourism products would people prefer after the epidemic is over? The survey shows that leisure travel and relaxation products are the first choice for domestic travel. From the perspective of the selection of various tourism products, the number of tourists who tend to have relax tour to the seaside is the most, accounting for 54%; at the same time, 42% of tourists surveyed plan to find a homestay for leisure, and 36% will be interested in mountain sightseeing. Food is always an important part of travelling, and 31% of tourists surveyed prefer tour products with good food experience.

3.3 Most Wanted-to-go Domestic Destinations
With the effective control of the epidemic in China, domestic tourism may be restored first. Which tourist destinations are the most wanted places for tourists? The survey report shows that the top 10 provinces, autonomous regions, and municipalities are Yunnan, Hainan, Tibet, Sichuan, Xinjiang, Chongqing, Beijing, Fujian, Zhejiang, and Shanxi. These tourist destinations have rich natural and cultural tourism resources, beautiful nature scenery, unique ethnic customs, and dynamic and elegant urban charm, making these places good choices for tourists to relax.
From the perspective of the most wanted tourist cities, top 10 cities are Sanya, Chongqing, Chengdu, Beijing, Xiamen, Shanghai, Xi’an, Hangzhou, Qingdao and Nanjing.

4. Travel Abroad

4.1 Top Overseas Destinations
At present, the restrictions on international travel and international flights have not returned to normal due to the continuous spreading of infections in some countries. The recovery of overseas travel will lag behind, but tourists still have obvious needs for overseas travel after the epidemic. The survey report shows that Asian destinations are the first choice of many tourists for travel abroad after the epidemic. Japan (18%) and Thailand (14%) are the two most preferred choices of travel destinations. European countries also remain as favorable destinations (14%), followed by Maldives, Singapore, New Zealand, Australia, South Korea, Sri Lanka and Malaysia.

4.2 Preferred Ways of Overseas Travel
For those who are planning to travel abroad after the epidemic, 48% said they would choose to travel with a group, 34% would choose to travel independently, and 18% said they would commission a travel agency to customize the tour. According to the survey results, the demand for travel agency’s services for traveling abroad is much higher than those for domestic travel. Compared with tourists from other areas, tourists from the first-tier cities (Beijing, Shanghai, Guangzhou and Shenzhen) also have some obvious differences in the way they travel abroad. With relatively more experiences of overseas tours, tourists from first-tier cities are more likely to travel abroad independently (46%, higher than the average level of the nation), rather than in a group (40%, lower than the average level of the nation).

4.3 Length of Overseas Travel
44% of tourists surveyed may arrange 6-8 days for outbound tour, 21% of tourists may arrange 3-5 days, 17% may arrange 9-10 days, and 16% may schedule more than 10 days.
4.4 Preference for Overseas Travel Product

After the epidemic has passed, going to tropical islands to enjoy the sun, the sea and the beach is the first choice for many tourists who want to travel abroad. Among those who intend to travel abroad, 58% of the tourists indicated that they would prefer tropical island vacation products, which accounted for the highest proportion of various tourism products. Cultural themed tourism products that enjoy exotic cultural flavors are also popular, as chosen by 33% of tourists. Regardless of domestic or overseas travel, Chinese people always have a passion for food. 30% of tourists said they would prefer travel products that include food experience.

4.5 Factors Affecting Decisions on Overseas Travel

Needless to say, the epidemic of new coronavirus pneumonia has a great impact on people’s normal work and life. Even after the domestic epidemic is over, various factors still affect people’s willingness to travel and travel arrangements. 61% of the tourists surveyed said that the work situation after resuming work and production, and whether the vacation time in 2020 will be shortened, will have an impact on their travel arrangements and choice of travel destinations. More than 50% of the tourists believe that the cost of traveling abroad and the epidemic situation in overseas countries will affect their willingness to travel abroad and the choice of destinations. Meanwhile, effective epidemic precaution measures by travel agencies and hotels, full refund when canceling trips, the friendly countries that support China during this epidemic, the status of issuing entry permit for Chinese tourists and recovery of international flights, are also concerned factors by tourists, and may have impact on their overseas travel arrangements.

4.6 Cruise Travel

The spreading of the coronavirus epidemic on several International cruises ships has clearly led to negative impacts to many tourists. 52% of tourists said that it is uncertain whether they will choose cruise travel later; 36% of tourists said that cruise travel will not be considered in 2020, and may be considered next year; Only 13% of tourists surveyed may consider appropriate cruise travel product for the 2nd half of 2020.
worry-free of epidemic risks, 16% are very much interested in such products while 26% won’t consider it for a while.

5.2 Promotions affecting decisions on travel

Among the tourists who participated in the survey, 54% of the tourists said that recommendations from relatives and friends would affect their choice of travel destinations and arrangements of travel plans. This shows that word of mouth and personal “private domain traffic” used in travel promotion play an important role. 41% of tourists believe that the recommendations of travel experts or Internet celebrities and the advertising of travel destinations will affect their travel plans.

5.3 Suggestions to Services of Travel Agencies and Destinations

The outbreak of the epidemic and strict prevention and control measures in the past two months have also had a greater impact on people’s consumption philosophy, consumption behavior, and consumer demand. After the epidemic, people have higher requirements for travel products and services from travel agencies and destinations. From the survey results, the health and safety assurance during travel is the main concern. Tourists surveyed generally hope that travel agencies and destinations can do a good job of health and safety protection, take necessary measures to ensure the health and safety of tourists during travel, and provide information such as destination country or region’s epidemic risk situation and hotel sanitary conditions. Some tourists suggest that travel agencies can further
improve the quality of tourism products, such as raising the standard of food and accommodation, reducing the shopping arrangements, less tight itineraries, and increasing small group boutique tours. In addition, some tourists suggest that travel agencies can provide more diversified tourism products, especially private customized tours, F.I.T. and in-depth experience tours.

6. Preparing for Recovery

6.1 Get Ready for the Recovery of Market
As the domestic epidemic situation is effectively controlled, many scenic spots have begun to resume operations, and domestic tourism will gradually recover from the state of shutdown. In response to tourists’ travel intents and demand characteristics, destination tourism departments and enterprises must prepare for the market recovery and rebound in advance. Timely and effective marketing, provision of tourism product and tourism experience that cater to the needs of tourists after the epidemic, are the keys to the success of destination tourism companies in the market recovery.

The outbreak of the new coronavirus pneumonia not only has a great impact on China’s tourism industry, but also has a profound impact on the global tourism industry, especially the popular destination countries for Chinese citizens traveling abroad. At present, the epidemic is still spreading in some countries. Although many overseas tourist destinations are attractive to Chinese tourists, who have a stronger willingness to travel, there are still many uncertainties in the final choice of tourism destinations before the epidemic situation in the relevant countries is effectively controlled. But based on the needs and preferences of tourists, it is necessary for tourism companies to prepare in advance for market recovery.

6.2 Tourism to be Part of Recovery Plans
On March 6, 2020, UNWTO calls on governments, international organizations and donor agencies to include tourism as a priority in recovery plans and actions. All economies affected by the COVID-19 epidemic shall include support for the tourism sector in the wider recovery plans and actions. As a cross-cutting economic activity, tourism can lead wider economic and social recovery, as proven in past disruptions on the back of the highly resilient nature of the sector and its ability to bounce back strongly. Tourism will play a key role in future recovery efforts.
Organization Introduction

Ivy Alliance Tourism Consulting

A leading international tourism think tank established in 2001 in Beijing, China. It has rich experience in the fields of Chinese outbound tourism market research, tourism service quality certification, tourism project planning, investment and financing consulting, tourism event and exhibition planning and implementation, and marketing solutions offering. It is the project cooperation agency of international organizations such as UNWTO, PATA, and World Bank Group.

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China Comfort Travel Group

A large state-owned tourism group under the Beijing Tourism Group. Its business covers outbound tours, inbound tours, domestic tours, cruise vacations, convention and exhibition business, visas etc. It has 350 subsidiaries, and nearly 4,000 store outlets across the country.

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Pacific Asia Travel Association

Founded in 1951 and it is one of the most influential and non-profit international tourism organizations in the world. PATA is committed to the responsible development of the region’s travel and tourism industry. Through partnerships with public and private tourism agencies, PATA continuously promotes the sustainable growth of the travel and tourism industry in the Asia Pacific region, as well as the improvement of value and quality.

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