STUDY ON CHINESE MEDIA CONSUMPTION PATTERNS
STUDY ON CHINESE MEDIA CONSUMPTION PATTERNS AND THEIR INFLUENCE ON THE PURCHASING BEHAVIOUR OF TRAVEL PRODUCTS

by Kairos Future

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### Table of content

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executive summary</td>
<td>5</td>
</tr>
<tr>
<td>Introduction</td>
<td>16</td>
</tr>
<tr>
<td><strong>Chapter 1</strong></td>
<td>17</td>
</tr>
<tr>
<td>Introductory overview of the current and future role of online and offline media for Chinese travellers</td>
<td>17</td>
</tr>
<tr>
<td>1.1 Introductory background</td>
<td>17</td>
</tr>
<tr>
<td>1.2 Digitalisation is changing the face of the Chinese media</td>
<td>19</td>
</tr>
<tr>
<td>1.2.1 Printed media struggling to reinvent itself</td>
<td>20</td>
</tr>
<tr>
<td>1.2.2 TV and radio in search of new formats and audiences</td>
<td>22</td>
</tr>
<tr>
<td>1.2.3 Mobile channels and formats dominate the new media landscape</td>
<td>23</td>
</tr>
<tr>
<td>1.2.4 WeChat a ‘Swiss army knife’ of Chinese digital media</td>
<td>24</td>
</tr>
<tr>
<td>1.2.5 Video gaining a larger share of online content</td>
<td>25</td>
</tr>
<tr>
<td>1.2.6 Crowdsourced content powers platforms for news</td>
<td>25</td>
</tr>
<tr>
<td>1.3 Media’s roles in travel</td>
<td>26</td>
</tr>
<tr>
<td>1.3.1 Traditional travel media remain relevant and inspire travel ideas</td>
<td>26</td>
</tr>
<tr>
<td>1.3.2 Social media has expanded its role in the inspiration and research stages of travel</td>
<td>26</td>
</tr>
<tr>
<td>1.3.3 Tourism businesses increasingly skilled at engaging audiences through social media</td>
<td>27</td>
</tr>
<tr>
<td>1.3.4 Influencers in the online travel media arena have found a successful formula</td>
<td>27</td>
</tr>
<tr>
<td>1.3.5 Chinese OTAs are more integrated than their western counterparts</td>
<td>28</td>
</tr>
<tr>
<td>1.3.6 Growing demand for channels offering customisation of travel experiences</td>
<td>31</td>
</tr>
<tr>
<td>1.3.7 OTAs and start-ups experiment with data mining and machine learning techniques</td>
<td>31</td>
</tr>
<tr>
<td>1.3.8 Virtual reality used for immersive travel storytelling</td>
<td>31</td>
</tr>
<tr>
<td>1.3.9 Planning in the new media landscape</td>
<td>32</td>
</tr>
<tr>
<td>1.3.10 Digital channels influence Chinese travellers’ shopping abroad</td>
<td>33</td>
</tr>
<tr>
<td>1.3.11 Traditional channels remain important for booking</td>
<td>33</td>
</tr>
<tr>
<td>1.3.12 The online footprint of Chinese travellers influences others</td>
<td>34</td>
</tr>
<tr>
<td>1.3.13 Chinese travellers more likely than western travellers to write reviews</td>
<td>35</td>
</tr>
<tr>
<td>1.4 The future role of online and offline media for Chinese travellers</td>
<td>35</td>
</tr>
<tr>
<td><strong>Chapter 2</strong></td>
<td>37</td>
</tr>
<tr>
<td>Online and offline media usage in the planning stage of a trip – based on a survey of Chinese outbound travellers</td>
<td>37</td>
</tr>
<tr>
<td>2.1 Media usage and booking behaviour at a glance</td>
<td>37</td>
</tr>
<tr>
<td>2.1.1 Plugging into the evolving online travel ecosystem</td>
<td>37</td>
</tr>
<tr>
<td>2.1.2 Where to inspire</td>
<td>37</td>
</tr>
<tr>
<td>2.1.3 Where to inform</td>
<td>38</td>
</tr>
<tr>
<td>2.1.4 Where to sell</td>
<td>39</td>
</tr>
<tr>
<td>2.1.5 Whom to target</td>
<td>40</td>
</tr>
<tr>
<td>2.2 The survey</td>
<td>40</td>
</tr>
<tr>
<td>2.3 General media consumption patterns</td>
<td>40</td>
</tr>
<tr>
<td>2.3.1 From offline to online and from desktop to mobile</td>
<td>41</td>
</tr>
<tr>
<td>2.3.2 News consumption has moved from batches to streams</td>
<td>41</td>
</tr>
<tr>
<td>2.3.3 Mobile phones are used for everything but calling</td>
<td>42</td>
</tr>
<tr>
<td>2.3.4 A separate Chinese media landscape</td>
<td>42</td>
</tr>
<tr>
<td>2.3.5 Three media consumption styles</td>
<td>42</td>
</tr>
<tr>
<td>2.4 Differences in travel attitudes and behaviour between travellers</td>
<td>44</td>
</tr>
</tbody>
</table>
Chapter 3

Interaction points for connecting with Chinese travellers at different stages of their customer journey

3.1 The Chinese outbound traveller’s customer journey and associated touchpoints
   3.1.1 Illustrative case: the customer journey of a budget-constrained outbound traveller
   3.1.2 The generalised customer journey

3.2 Channels and touchpoints

3.3 The inspiration phase
   3.3.1 Inspiration is an incubation stage, generating ideas that feed into the planning process
   3.3.2 Narrowing down the idea pool
   3.3.3 Touchpoints and triggers in the inspiration phase

3.4 Decision to go on a trip – the starting point of the active preparation process

3.5 The seed stage: exploring possible trips
   3.5.1 Channels, touchpoints, and triggers in the seed stage

3.6 Gradual concretisation phase
   3.6.1 Building a backbone for the trip
   3.6.2 Adding more layers of detail to the plan
   3.6.3 Channels, touchpoints, and triggers in the concretisation stage

3.7 Detailed planning and booking
   3.7.1 Channels, touchpoints and triggers in the detailed planning and booking stage

3.8 The travel phase

Chapter 4

Recommendations

4.1 General advice
   4.1.1 Reaching potential Chinese travellers, despite a low budget
   4.1.2 Next steps for destinations and product providers with more resources
   4.1.3 A strong online presence is more important than ever
   4.1.4 Four ways to connect through social media
   4.1.5 Use OTAs to show your existence in the concretisation stage, and your USPs in the booking stage
   4.1.6 Use Baidu to be visible where travellers first turn to check out a destination
   4.1.7 Ensure your website works well in China and on mobile
   4.1.8 Encourage travellers to share
   4.1.9 Work with KOLs

4.2 Don’t underestimate triggers in offline channels

4.3 Trigger inspiration through beautiful and honest photos
   4.3.1 Signal honesty
4.4 Tailor marketing to fit with destination’s ‘standard configuration’ ................................................................. 82
  4.4.1 Listen to Chinese visitors to learn what the standard configuration looks like ........................................... 83
  4.4.2 Attach products to an existing configuration if possible ............................................................................. 83
  4.4.3 Connect in the inspiration phase to construct a new configuration............................................................. 84
4.5 Connect in spaces where a niche audience is present ....................................................................................... 84
4.6 Leverage repetition of triggers by connecting at multiple touchpoints ......................................................... 84

Appendix ................................................................................................................................................................. 86
Method ...................................................................................................................................................................... 86
References ................................................................................................................................................................. 85
Executive summary
Chapter 1: Introductory overview of the current and future role of online and offline media for Chinese travellers

China’s evolving media landscape

- **The Chinese media landscape is largely isolated from that of the rest of the world.** Though most western media channels have a Chinese equivalent, the Chinese media ecosystem features many distinctly Chinese manifestations of global trends and business models, and has invented elements not seen elsewhere. (1.1, 1.2)

- In some cases, global trends have come further in China than elsewhere. Most eye-catching, **the mobile internet has been embraced to a greater extent in China** than in Europe and most other parts of the world. Chinese adults spend two hours and 26 minutes per day on mobile devices, almost half an hour more than Germans. (1.2, 1.2.3)

- **A mature mobile payments infrastructure** has propelled the Chinese mobile payment volume to 50 times that of the United States. This has **helped Chinese digital media companies to monetise users** through a variety of revenue streams without relying too heavily on advertising revenue. Micro payment-based business models, for example, have proved more useful than western alternatives in monetising peer-to-peer Q&A, user-generated news, live video-streaming, and a range of sharing economy (or ‘rental economy’, as it is commonly known in China) concepts. (1.2)

- **A shift toward online and mobile channels** – Chinese now spend seven times as much time online than with print media and more than 50% more time on mobile devices than computers – has **fundamentally reconfigured the Chinese media landscape**. Characteristic features of the Chinese online ecosystem include large integration of functions within platforms, dominance of a small number of internet powerhouses, rapid evolution due to fierce competition and demanding consumers, and a large impact of government policy and pressure. (1.2)

- **Despite the digital shift, traditional media are not rendered obsolete.** **Print media** is in steep decline, but the average Chinese still spends 13 minutes per day reading newspapers and seven minutes per day reading magazines. Despite an overall decline in **TV watching**, some channels have found new formats that connect with young audiences and begun to distribute their content online. While radio has lost popularity to new media overall, in about 40% of large cities **radio listening** has gone up as middle-class consumers spend more time in cars. (1.2.1, 1.2.2)

- **Offline advertising formats** commonly used for advertisement in Chinese cities include metro train advertisement, billboards and displays, and videos displayed in taxis.

- **The balance between public discussions in open online environments**, such as microblogs, and private discussions in closed mobile platforms, such as instant messaging, has shifted toward the latter, making targeted sponsored content a more important form of marketing. (1.2)

- **With 850 million active monthly users, WeChat is China’s largest social media platform**, offering functions ranging from instant messaging, sharing of posts and images, and access to a wide range of services. Businesses use WeChat to reach consumers through sponsored posts in users’ feeds, content marketing through their own official accounts, collaboration with popular influencers, and in-app stores and member clubs. (1.2.3, 1.2.4)

- **Video is gradually growing its share of online content and consumers’ attention.** Professionally produced content is increasingly distributed online, and an explosion in user-generated content has occurred, partly driven by the successful introduction by Chinese video platforms of mechanisms for contributors to monetise their content. (1.2.5)

- **Crowdsourcing and artificial intelligence are coming together to provide personalised news** on a vast number of topics. Jinri Toutiao, the biggest platform in the space, provides its 260 million monthly users with a personalised selection of its 50 million articles and bit-sized stories, livestreaming shows, cartoons, and interactive Q&A channels.
contributed by users, contracted professionals, partners sites and, increasingly, generated through automated journalism. (1.2.6)

Media’s roles in travel

- **Traditional media, such as travel magazines and TV, have remained a strong source of travel inspiration.** One in seven magazines sold in China are travel magazines, testifying to the enduring role of print media in conveying travel experiences and dreams. There are many examples of popular TV series and documentaries triggering a wave of tourism to a destination featured. (1.3.1)

- **Social media has expanded its role, both in the inspiration and research stages of travel.** Popular sources include review sites, travel communities, and photos and posts shared by professional as well as ‘hobby’ travellers. The ecosystem includes both general-purpose platforms such as WeChat and Weibo, specialised travel communities such as Qiongyou, and ‘social’ sections of online travel agencies (OTAs) such as Ctrip. Compared to western travellers, Chinese travellers have a higher tendency of writing reviews after their trips. (1.3.2)

- **Destinations and tourism businesses are becoming more skilled at engaging audiences through social media,** for example through gamified travel experiences that rewards online sharing, live-streaming that enables immediate purchases, and video content that is broadcast through popular online platforms. (1.3.3)

- **The biggest travel influencers in Chinese social media include Tamaxingzhe, an individual working in the travel industry with 3 million followers on Weibo; Azinan, a former travel columnist with 1.4 million followers on WeChat; and the official account of travel platform Mafengwo, with 44,000 followers on WeChat. Success factors of these influencers include sharing of authentic travel experiences, for example related to local lifestyle and food; photos and information about local fashion, styles, and stores; information about new, cool destinations and ‘fresh’ experiences; and practical and useful advice on what to do and avoid at different destinations.** (1.3.4)

- **The internet search engine Baidu commonly used by Chinese outbound travellers to find more information when researching a trip.** The most common travel related searches on Baidu include ‘recommendations’, ‘hotel booking’, ‘flight booking’, ‘discounted tickets’, ‘travel websites’, and ‘independent travel guide’. These searches highlight the importance of recommendations by other travellers in the planning stage, but also point to the demand for travel guides independent of the large online platforms. (1.3.9)

- **Chinese OTAs integrate more services than their western counterparts,** and have extended their reach throughout the inspiration, planning, booking, and experience stages of travel. They offer extensive customer support through web, apps, and phone, and are setting up help centres at popular destinations. Their ambition of catering to travellers’ every need has led them to branch out into industries such as aviation and cruises. (1.3.5)

- **The boundaries between OTAs, travel information platforms, and metasearch providers have blurred,** as most travel related online platforms in China are moving towards both providing community-created content and advice and selling products directly to travellers. (1.3.5)

- **Among travel-focused platforms in China, Ctrip has the largest user base** (ranked 232 among all websites in China based on number of visitors) as well as the highest time spent per daily user (almost 7 minutes). It is followed by Qiongyou (travel community with OTA aspirations; ranked 279), travel community Mafengwo (another travel community-turned-OTA; ranked 282), and Fliggy (travel e-commerce platform; ranked 425). (1.3.5)

- **Platforms for professional, peer-to-peer, or automated personalisation of trip design have attracted a growing segment of consumers with an urge to travel independently and gaining experiences tailored to their individual tastes, but without the time or knowledge to plan the trip themselves.** (1.3.6)
- **Data mining and machine learning techniques** are used by Chinese OTAs for automated trip planning and customer service, personal recommendations, targeted advertising, forecasting, and dynamic pricing. More particular to China, Alibaba is mining its users’ transaction history to give them a credit rating that can allow them to rent cars and book hotels without deposit. (1.3.7)

- Posting **360-degree photos** was recently enabled on Weibo, and several travel agencies and online platforms are experimenting with **VR as a format for conveying travel experiences in a more immersive way**. Such formats are seen by Chinese consumers as providing a more honest picture of a destination or products, since they make it more difficult to hide negative aspects. (1.3.8, 1.4)

- In contrast to most other common travel related activities, **shopping during overseas trips has its own set of popular online channels**. Travellers tend to investigate popular products for a destination on Xiaohongshu and Taobao. One reason for doing so is to identify items to purchase for oneself or bring back as gifts. Another reason is the so-called *daigou* phenomenon, where travellers purchase items that are better-priced outside China and sell them after returning to China, **turning travel into business for many young Chinese**. Indeed, Chinese born in the 1990s are sometimes called the ‘slash generation’, referring to their tendency to turn hobbies into commercial projects; they may introduce themselves as an ‘accountant slash professional shopper’ or a ‘designer slash live-streamer’. (1.3.10)

- The **future role of online and offline media in China** is likely to be influenced by trends in values and lifestyles as well as technology, including those outlined below. Global trends, such as the growing utilisation of VR and machine learning technologies, could well happen faster in China than elsewhere, following the pattern in other areas such as mobile internet use. (1.4)

  - The growing **individualisation of travel** is likely to enable tourism businesses to **target the ‘long tail’ of more specialised and niche market opportunities** through smaller and less crowded channels.

  - As growing use of **artificial intelligence** is likely to reinforce existing preferences and travel patterns, unless models are specifically designed to recommend novel and less explored options.

  - With technologies such as **augmented reality and image recognition**, **print media is likely to move from inspirational trigger closer to the planning and purchase stages of travel**. Blurring the boundaries between offline and online touchpoints could, for example, take the form of letting the user watch a video from a destination by pointing a smartphone toward a photograph in a travel magazine, or booking a trip by scanning a QR code next to an article.

  - As travellers increasingly share **VR and 360-degree photos** in their social media channels, as Weibo has already enabled, **the need for immersive travel storytelling will grow**.

  - As a more **self-expressive and individualistic generation grows up**, individualised experiences and marketing approaches will become more important.
Chapter 2: Online and offline media usage in the planning stage of a trip – based on a survey of Chinese outbound travellers

- **The survey confirms the largely separate nature of the Chinese media landscape**, applying to news media and social media as well as to channels used to plan and book trips. Domestic Chinese channels are preferred for all of these – European tourism organisations and providers of travel products therefore need to establish themselves in the Chinese channels. (2.3.4)

- **The evolving nature of the online media landscape and the on-going shift from offline to online channels can both be seen in the survey results.** Respondents commonly say they have abandoned printed newspapers, and to a smaller extent, magazines, during the last two years. The once dominant social media platform QQ is also being left by many, as are blogs. WeChat, on the other hand, is a channel which many respondents have started using during the last two years. So is the micro-blogging site Weibo, which has seen a downward trend but is now doing a comeback. Ctrip, Tuniu, and Fliggy are travel-oriented platforms that many have started using. (2.3.1)

- **The smartphone has become the new infrastructure for the online ecosystem, and this applies to media channels in general as well as to those specifically used for getting travel inspiration and to plan and book trips.** During trips, a majority of respondents use smartphones for finding attractions, chatting, taking photos, and finding restaurants. (2.1.1, 2.3.3)

- **A trend ‘from batches to streams’ can be seen in which channels are preferred among news media as well as social media.** News sites and news apps (two formats through which news are delivered in a constant stream) are more popular than newspapers (that deliver news packaged as one batch at a time). Instant messaging channels and micro-blogs (both stream-style) are likewise the most popular among social media channels (used several times per day by 74% and 38% respectively). (2.3.2)

- **Differences in media consumption habits exist between individuals.** Statistical analysis of survey responses reveals that one category of media consumers hold on to a traditional style of media consumption, with a preference for (printed and digital) newspapers and magazines, radio, and TV. Two separate styles can be seen among media consumers preferring online channels. One segment holds a mainstream online style, preferring news apps, news sites, and instant messaging. (This is where the ‘news in streams’ trend can be seen most clearly.) Others show a community style, preferring Q&A platforms, social community sites, and video sharing. This is where many of the more tech-savvy youth can be found. (2.3.5)

- **The different styles of general media consumption influence what channels travellers use to find travel information.** Among all respondents, the leading OTAs (especially Ctrip, [35%]) dominate as main source of travel information. OTAs are also overrepresented among travellers with a mainstream online media consumption style. Those with a traditional media consumption style tend to prefer traditional channels such as guidebooks, offline agencies, and official websites, while those with a community style have a preference for travel community platforms such as Qiongyou. (2.4.3)

- **Travellers with different media consumption styles in several ways differ when it comes to travel attitudes and behaviour in the pre-travel phase.** One difference is that **those with a community style media consumption show more interest than the others in travelling to Europe**, while those with a mainstream online style show less interest. (2.4)

- **The typical survey respondent settles on a destination one month ahead of departure, and a large majority (87%) chooses a destination before choosing activities.** A majority (55%) is always on the lookout for travel inspiration, regardless of whether they have decided to go on a trip or not – stressing the importance for product providers of being present in travellers’ inspiration phase. The habit of always looking for travel inspiration is especially strong among travellers with a traditional media consumption style. (2.4.1)
• ‘Beautiful scenery’ is the main factor that respondents say attract them to a destination (67%). Respondents with a traditional media consumption style tend to prioritise ‘rich culture and history’, while a ‘fascinating local lifestyle’ is more important to those with a community style media consumption. ‘Risk of terrorism’ is the main factor making travellers avoid a destination (87%). (2.4.2)

• Respondents typically spent 2-3 hours (39%) actively searching for online information ahead of their most recent outbound trip. Only 19% spent more than eight hours, and 15% spent about one hour. Those with a community media style tend to use more time than others. (2.5.3)

• 66% prefer to use smart devices for planning and booking trips (55% prefer a smartphone; 11% prefer a tablet). They are twice as many as those preferring to use a computer (29%). Only 6% prefer speaking with a person face-to-face or over the phone. The preference for smartphones is especially strong among respondents with a community media style, while those with a mainstream online style are more likely than others to prefer computers. Respondents with a traditional media style are the most likely to prefer using tablets. (2.5.3)

• Travellers with a traditional media consumption style tend to book less travel products before departure, and are more likely than others to book products such as rental cars and accommodation after arriving to the destination. Those with a community style pre-book portable Wi-Fi considerably more often than others. (2.5.4)

• OTAs and official homepages dominate among the channels respondents use for booking travel products. Just as with the media consumption styles, however, different booking styles emerge from a statistical analysis clustering respondents using different booking channels. (2.5.2)

  ■ **Direct bookers** book directly with product providers, through their homepages or by calling or visiting establishments on-site. Selling to this group requires visibility in key channels used for travel research, and keeping an official website on which booking is easy.

  ■ **OTA bookers** book through OTAs, so selling to this group involves establishing a presence on the largest OTA platforms including Ctrip and Qunar. This booking style can to some degree be linked to the mainstream online media consumption style.

  ■ **Social bookers** book through channels with social elements such as Mafengwo, Dianping, and official accounts on WeChat. Selling to this group requires a presence and visibility in key social channels. There is a connection between this booking style and the community media consumption style.

  ■ **Traditional agency bookers** book by visiting the physical office of an offline travel agency or by using the website or app of a traditional agency such as CYTS or U-tour, so selling to this group requires working with travel agencies. This booking style can be strongly linked to the traditional media consumption style.

• **Good value for money (51%), good location (37%), cleanliness (34%), and safety (32%)** are the overall most important factors when choosing accommodation. Respondents with a traditional media style find good breakfasts, Chinese-speaking staff, and Chinese payment methods more important than others do, while those with a community style tend to prioritise comfortable beds and Wi-Fi. (2.5.5)

• **Shopping at the destination is generally planned before departure (85%), but also done spontaneously at the destination (89%).** E-commerce sites (56%) and recommendations from family and friends (52%) are the overall most important channels for shopping preparations. Virtually everyone (98%) buys products to bring back for others. Travellers with a community media style also use social media for preparing their shopping, while those with a traditional style more often than others use printed media such as guidebooks. (2.6)
Chapter 3: Interaction points for connecting with Chinese travellers at different stages of their customer journey

The inspiration stage

- During the **inspiration phase**, which could be seen more as a permanent state activated when travellers are not actively planning a specific trip, approximately half of travellers keep their ears and eyes open for new travel ideas (the remaining half claims to think about travel only when a specific trip needs to be planned). Ideas incubated during the inspiration phase become input into the planning stage once a decision to travel has been made, if they fit with the practical circumstances of the trip. (3.3, 3.3.1)

- Most interviewees in this study mention **WeChat as a primary source of travel inspiration**. Triggers in this channel comes in the form of content posted by friends (posts, photos, videos, and article links); posts by influencers and official accounts of tourism businesses and destinations; and sponsored content. (3.3.3)

- In terms of formats, **photos are mentioned as the most common inspirational trigger**, present in a variety of channels, including WeChat moments, social media posts, and travel magazines. Interviewees prefer photos that convey beauty, tranquillity, and simplicity; avoid pretentiousness and unnecessary use of people; and are authentic and honest. (3.3.3)

- **Video is also perceived as an attractive format**, whether in the form of user-generated short videos or live-streaming, or professionally produced content such as documentaries or special interest shows. (3.3.3)

- **The effect is most powerful when a travel idea is triggered through several different touchpoints.** Travel decisions among some of the interviewees were sequentially triggered through different channels, such as a documentary, a product label in a shop, a WeChat post, a video on a screen in a taxi, and a billboard in the metro system. Combining several online and offline touchpoints for marketing, and timing campaigns with spontaneously occurring news and viral messages about a destination or tourism product, can increase the likelihood of a travel idea catching on. (3.3.3)

- After a travel idea is triggered, several interviewees do initial research, typically by searching for a destination or travel concept on Baidu. The motivation for this is to find out if the travel idea is as attractive as it seems, and whether it is viable. (3.3.2)

- The interviews reveal the occurrence of strong local and intra-group travel preferences (‘All my friends are suddenly going to New Zealand’, for example), indicating that **viral logics can be leveraged by targeting specific communities, consumer tribes, and special interest groups.** (3.3.3)

The seed stage

- At the beginning of the planning stage, various ideas that have been incubated during the inspiration stage, as well as recommendations from others, become **seeds for further investigation and planning.** Seeds can take various forms (a hotel type, theme or experience type, budget range, distance from current location) and be more or less specific (‘travelling around Europe’ vs. ‘seeing Montmartre with my own eyes’). (3.5)

- **Rather than any clear triggers, the seed stage involves what could be called ‘anti-triggers’**: information that leads to the rejection of preliminary travel ideas, eventually resulting in one single idea that can be translated into an actual trip. Destinations and tourism businesses can attempt to avoid anti-triggers through search engine optimisation of official websites and honest communication to avoid gaps between expectations and the actual experience, which is likely to find its way to the attention of prospective travellers. (3.5.1)
The concretisation stage

- **Some take planning more seriously than others**: Approximately 15% of the outbound travellers surveyed in this study avoid planning altogether by tagging along family or friends; 45% outsource some or most of the planning to travel companions or online trip design assistance; 25% adopt large parts of itineraries suggested by others or focus on top-rated attractions on review sites; 15% meticulously plan themselves and tailor every part of their itineraries to their own personal tastes. (3.5)

- During a process of gradual concretisation, the traveller first builds a backbone for the trip with the most important components – in some cases the airfare, in others a key activity or a hotel. When this backbone is settled, and preferably booked, additional layers of detail are added to the trip. (3.6.1)

- **Designing a personalised travel experience for oneself is typically done by modifying tried and tested configurations.** The interviewees typically adopt most attractions and activities they are interested in from crowd-rated top lists. They then add specific components that they find in other sources and that fit their interests. **Marketing thus needs to relate and connect to these collectively established itineraries.** (3.6.2, 3.6.3)

- While building a backbone for the trip, consumers use a number of sources to gain a preliminary understanding of what a possible trip or destination has to offer: they browse top lists of activities and attractions at a destination, based on ratings on leading travel community websites such as Qiongyou; compare flight and hotel prices and features through OTAs and meta-search engines; search images from a destination or activity through Baidu; visit the official websites of national and regional tourism organisations; and consult special interest websites. (3.6.1, 3.6.3)

- In the stage of detailed planning and booking, more concrete sources are used: OTAs for customer reviews, prices, detailed information, and real photos posted by customers; travel community platforms for user-contributed ratings and reviews, and travellers’ opinions about specific activities and attractions (some of the interviewees pay particular attention to negative reviews); product providers’ websites for specific information; e-commerce platforms for information about products and shopping places; and guidebooks for curated travel insights and recommendations. (3.7, 3.7.1)

- **Some booking and purchase decisions are triggered after the traveller has arrived at the destination.** Such decisions typically include choice of restaurants, cafés, shops, and less important attractions and activities. While only a few of the interviewees prefer to do take a majority of decisions at the destination, most have some room for impulsive purchase decisions. The interviewees keep using their Chinese apps for planning and booking during the trip. They also frequently share photos in their social networks while travelling, making lack of Wi-Fi problematic. (3.8)
Chapter 4: Recommendations

- **Strategies for reaching potential travellers despite a low budget** include providing photo-friendly spaces that encourage visitors to share their experience online; working with ‘budget influencers’ by making a deal with local Chinese students; and coordinating with other local tourism businesses to pool resources. A presence on the largest OTAs and in free channels such as platforms built on user-generated content, as well as basic Baidu search engine optimisation, should also be considered. (4.1.1)

- With a larger budget, advertising in social media and Baidu becomes viable. An active presence can be built in selected online channels, and the footprint can get bigger by becoming visible in more channels at once. An online+offline strategy can be applied to efficiently reach potential travellers through multiple touchpoints, and collaborations with ‘medium influencers’ can be used for content marketing. Websites can be optimised for the Chinese market and the particular challenges associated with the Chinese internet. (4.1.2)

- Four ways to connect with potential travellers through social media are buying sponsored posts which appear in users’ feeds, setting up one’s own official accounts to actively interact with the audience, collaborating with key opinion leaders (KOLs) for promoting products, and connecting indirectly through encouraging today’s visitors to share their experience with friends. (4.1.4)

- OTAs are important channels for showing one’s existence to travellers who are in the concretisation stage, and to sell using available features to travellers in the planning and booking stages. However, low-price-strategies by OTAs mean that the margins for product providers are generally low. (4.1.5)

- Baidu is an important place to be visible, as most travellers pass through this channel multiple times when doing research ahead of trips. Measures that increase the chance of being seen are making sure a site is indexed, applying search engine optimisation, and advertising. (4.1.6)

- Official websites are important to travellers for both information and booking. To keep travellers’ interest once they find your site, make sure it loads quickly by removing any components relying on services that are blocked in China. Use Chinese language, and adapt to Chinese conceptions about the destination. If the site allows direct booking, it should accept Chinese payment methods. Make sure the site looks good on mobile. Stronger web platforms can be built by collaborating with other businesses and tourism organisations. (4.1.7)

- Recommendations and stories from friends and family (online or offline) is the kind of trigger most likely to evoke inspiration. Online sharing can be encouraged by providing photo-friendly spaces and Wi-Fi, to facilitate uploading posts immediately. Letting visitors ‘check in’ at a physical destination on WeChat also increases the likelihood that they will share experiences online. (4.1.8)

- Working with online KOLs can be an efficient way of connecting with a wide audience and trigger inspiration. Large players such as national tourism organisations can maximise the influence through collaborating with actors and other stars, while smaller businesses and organisations can apply the same logic at a smaller scale by working with niche influencers such as bloggers. (4.1.9)

- Offline media such as travel magazines and advertising in public spaces can be used for efficient triggers in the inspiration phase, despite the general trend from offline to online channels. (4.2)

- Beautiful photos are the most important triggers for evoking an initial interest. They should signal that visiting the destination will be highly different from the everyday life in a big Chinese city. Tranquil nature and traditional architecture have potential to catch on, while photos showing people should be avoided. As with any marketing targeting Chinese travellers, signalling honesty is key when composing photos. Photos that look arranged or have excessive post-processing should therefore be avoided. (4.3)
Travellers’ ideas about a destination are heavily influenced by the itineraries of those who have been there before. ‘Standard configurations’ exist for all well-known destinations, and might be different from corresponding local conceptions of what should be seen and experienced at a destination. Product providers need to understand the degree to which their product fits into a standard configuration, and adapt marketing to that. This can be learnt from interviews and surveys at the destination, or from studying online travel media. If a product can easily be attached to a standard configuration, it should be made visible where the destination is already visible and marketing should relate to widespread perceptions of it. Products that cannot be attached to existing configurations should be marketed as alternative and unique, and potential travellers should be reached in the inspiration phase rather than the concretisation phase. (4.4)

Repetition of a trigger from several sources increases the chance that it will catch on. This can be leveraged by focusing on a limited target group, and connecting to this through multiple online and offline channels at once. Since reinforcing triggers from friends can be especially strong, visitors should be encouraged to share their experience online. Repetition can also be leveraged by hooking onto films, TV series, and other media formats that are exposing a destination. (4.6)
Introduction

The purpose of this study has been to investigate Chinese online and offline media consumption patterns and their influence on purchasing behaviour of travel products in the pre-travel phase. This includes measurement of the connection between media consumption patterns and actual consumption of specific travel products.

The results of the research is intended to help European tourism businesses to tailor targeted marketing and promotion activities in China. It pays particular attention to how to leverage and optimise marketing strategies, digital technologies, and audio-visual tools to connect to Chinese consumers.

The study has taken a mixed methods approach (described in further detail in Appendix):

1. Qualitative as well as quantitative information was gathered from existing published research and synthesised into an overview of the current and future role of online and offline media for Chinese travellers. The research was complemented with interviews with five travel experts in China.

2. A survey was conducted with outbound travellers in five Chinese cities and used for an analysis of Chinese online and offline media usage in the planning stage of a trip.

3. An in-depth qualitative analysis, including a focus group and 20 semi-structured interviews with Chinese outbound travellers, was carried out to map interaction points and viable approaches for connecting with the Chinese consumer at different stages of the traveller’s customer journey.

The report is structured as follows. Chapter 1 provides an introduction to the rapidly changing Chinese media landscape, and media’s role in travelling according to previous research. Chapter 2 presents the results of an analysis of Chinese online and offline media usage in the planning stage of a trip based on primary research. Chapter 3 maps the Chinese outbound traveller’s customer journey and the interaction points that product providers can utilise at its different stages. Chapter 4 offers conclusions and a set of strategic recommendations based on the outcomes of the research, targeting European destinations and tourism businesses.
Chapter 1

Introductory overview of the current and future role of online and offline media for Chinese travellers

1.1 Introductory background

The Chinese media landscape is going through a dramatic shift from offline to online – especially mobile – channels. Traditional news media are fighting to survive, with many newspapers having shut down for economic reasons in the last few years. At the same time, social media is gaining increased importance in the everyday lives of Chinese people, and new online platforms for crowdsourced news and live video streaming are emerging. China’s online media landscape is largely separated from the rest of the world, and dominated by a few big domestic companies.

For travel, social media is used for inspiration and planning as well as for sharing experiences with friends. Online travel agencies (OTAs) are popular for booking as well as for writing reviews. Reviewing of destinations and attractions is also done on travel platforms with user generated content. Reviews and social media updates have a great influence on the travel decisions of potential future travellers.

The purpose of this chapter is to provide an introduction to the rapidly changing Chinese media landscape and media’s role for Chinese travellers. Readers who are already familiar with Chinese media may want to skip to Section 1.4 for a discussion on the future role of online and offline media for Chinese travellers, Chapter 2 for an overview of how different media channels are used by individual travellers in the pre-travel phase, or to Chapter 3 for an analysis of interaction points along the traveller’s customer journey.

The trends and phenomena presented in this chapter can be divided into four types based on the degree to which they display unique characteristics:

- **Global phenomena in a Chinese setting**, for example the use of artificial intelligence mainly for recommendations and tailoring of trips.

- **Local manifestations of global phenomena**, for example OTA’s tendency to use a different blend of business model elements compared to their western counterparts, particularly relying more on integration of a range of different services.

- **Global trends that have come further in China**, for example the shift toward mobile formats, channels, and payments, as well as crowdsourced news.

- **Distinctly Chinese phenomena and trends**, for example micro payment-based business models such as those utilised by the Q&A platform Zhihu and the peer-to-peer entertainment channel YY.
Figure 1. Overview of China’s media ecosystem and media landscape, including media’s roles in travel

- Domination by a few internet powerhouses
- Mature mobile payment infrastructure
- Established mechanisms for non-advertising user monetisation
- Business models that allow user-contributors to earn money
- 'One-stop shop' rather than 'core competencies' management focus
- Censorship and high degree of government influence

- Struggling traditional media trying to reinvent themselves
- Rapidly evolving online ecosystem
- High degree of integration of functions in leading digital platforms
- Popularity of user-generated and crowd-curated content
- Emergence and growth of new formats such as live-streaming
- Interest in 'honest' formats such as 360-degree video and virtual reality

- An experience-focused and self-expressive young generation
- High adoption and usage of mobile devices
- Growing wealth and income levels
- Large-enough niche markets to sustain special interest media
- Lack of trust in unknown brands and individuals
- Entrepreneurial ideals and interest in turning hobbies into revenue streams

- Traditional media strong in the inspiration stage
- Social media and OTAs extending throughout the planning process
- Sprawling OTAs integrate a wide range of services and combine online and offline touchpoints
- 'OTAification' of leading online travel platforms
- Successful online travel influencers convey authentic, stylish, and 'fresh' experiences
- Experimentation with data mining, machine learning, and virtual reality
1.2 Digitalisation is changing the face of the Chinese media

China’s media landscape, hitherto a narrow sphere dominated by state-controlled television and print publishing, started changing in the late 1990s, with the establishment of a new breed of media companies taking advantage of the opportunities provided by the advent of internet in China and the country’s growing population of ‘netizens’. China underwent a digital transition that was far more compressed than in most western countries. The internet penetration surpassed 1% of the population in 2000, passed 10% in 2006, and reached 50% in 2016, with 731 internet users in December 2016. By contrast, the internet penetration in the European Union grew from 28% to 86% during the same time period. This is symptomatic: most technology-, consumer-, and value-driven shifts are faster in China than in the West.

With the online Chinese market blocked for outside services such as Google Search, Facebook, Twitter, YouTube, and Instagram, as well as publishers such as Deutsche Welle, Le Monde, The New York Times, and Reuters, China has seen the emergence of a separate online ecosystem. NetEase, which was founded in 1997, pioneered internet services such as e-mail and online games in China. Sina and Sohu, both remaining among the largest internet companies in China, were established the following year. Tencent, one of today’s internet giants, released its instant messaging service QQ in 1999. In the 2000s, these were followed by Baidu (internet search) in 2000; Taobao (peer-to-peer e-commerce) in 2003; Youku and Tudou (video sharing) as well as Renren (social networking) and Douban (a culture-oriented online community) in 2005; Sina Weibo (microblogging) in 2009; Zhihu (questions and answers) and Tencent’s WeChat (instant messaging) in 2011; and Jinri Toutiao (personalised news) in 2012.

While at first sight, the Chinese online media landscape shares many aspects of its international counterpart, it has several characteristic features and drivers:

- **High degree of integration.** In search of new revenue streams, Chinese internet companies have tended to leap into areas outside their core competencies, as internet giant Alibaba did when it transitioned from business-to-business to business-to-consumers e-commerce, as well as build alliances to cater to a variety of consumer needs. This had led to the creation of more diverse media platforms than is common in the West. The Alipay and WeChat platforms, for example, seamlessly integrate functions such as mobile payment, ticket purchase, access to credit, investment opportunities, and medical advice.

- **Relatively low reliance on advertising revenue.** The Chinese advertising market has traditionally been significantly smaller than its western counterpart, which has forced Chinese internet companies to develop other revenue streams. While Facebook generates more than 90% of its revenue from advertising, WeChat’s parent Tencent derives a similar share from non-advertising sources, including mobile payments, e-commerce, and sales of virtual items.

- **Mature mobile formats and mobile payment infrastructure.** China has come further in the transition to mobile internet than most countries. Chinese adults spend two hours and 26 minutes per day on mobile devices, almost half an hour more than Germans. The mobile internet penetration reached 95% of all internet users in 2017, up from 24% in 2007. Mobile payments were reportedly 50 times greater in China than in the United States, enabled by infrastructure and integration of mobile wallets into dominant digital platforms. The importance of the mobile internet market has forced Chinese internet companies to optimise their content to consumption through mobile devices. The topic is discussed further under Section 1.2.3. The widespread use of mobile wallets lowers the barriers for purchases, making it possible to swiftly pay by simply scanning a QR code and enables micropayments, such as 1 RMB for a bike ride.

- **Constrained by censorship and government policy.** The Chinese authorities have developed sophisticated censorship mechanisms efficiently restricting what information is possible to share and take part of online. Internet users are met by error messages if trying to search for sensitive keywords, social media posts deemed inappropriate, or blocked media sites. A large share of the responsibility is placed on the online media companies, who are responsible for...
keeping sensitive content off their platforms. Despite being private companies, they also need to relate to a range of other government pressures and demands, such as enforcement of real-name registration of users, limiting anonymity online.  

- **Innovation is both a mind set and a state policy.** Recent years has seen the rise of an aspirational entrepreneurial ideals among young Chinese, fuelled by the success of entrepreneurs such as Jack Ma (Alibaba), Lei Jun (Xiaomi), and Ma Huateng (Tencent). The preference among young Chinese for more creative and flexible work forms can be seen in the proliferation of incubators and co-working spaces, currently standing at more than 4,000. The authorities are promoting ‘mass entrepreneurship’ in a variety of ways, while investing heavily in new technologies, ranging from artificial intelligence to quantum computing, through different levels of government.  

- **Domination by a small group of ‘backbone companies’.** Collectively, Baidu, Alibaba, Tencent and Sina control eight social and e-commerce networks with over 2 billion active users (not accounting for the overlap in user bases), as well as a host of smaller platforms. These players are pumping money into the innovation ecosystem, supporting promising start-ups in the digital and online-to-offline economy – whether in food delivery, travel booking, bike-sharing or ride-hailing. Through gradual consolidation, over time they tend to end up with stakes in the same eventual winners. In recent years, these internet powerhouses have invested in or acquired internet companies in East Asia and South-East Asia, where they compete head-on with global players such as Amazon and Facebook.  

- **Fierce competition accelerates the pace of change.** It is not uncommon that once a business model shows potential, hundreds of companies join the fray. This forces the competing companies, not least the market leader, to iteratively adjust and refine their business models under immense competitive pressure. As withdrawals and consolidation reduces the number of competing businesses, the winners tend to come out strong, often with models for monetisation that are better than those of similar companies in the West.  

**Consumer class characteristics make ‘crossing the chasm’ easier.** The Chinese consumer class is large enough to sustain even small niches. The manicure market, for example, is larger than the entire GDP of Greece. While the growing Chinese middle-class has also, in a short time period, become among the most discerning in the world, it is also hungry for new things, experience-seeking, and high-spending. The young generation is adopting ‘indie’ and ‘hipster’ tendencies with growing confidence, increasingly seeking uniqueness and identifying with specific consumer tribes rather than the mainstream. As one interviewee in this study put it: ‘If someone doesn’t like my taste, it just means they have bad taste’. These characteristics accelerate the adoption of new trends and make the classical difficulty of ‘crossing the chasm’, between the visionary early adopters and the pragmatic early majority, easier than in most other places. China’s fast-changing society, with a lack of strong consumption legacies, meanwhile makes it easier for consumers to adopt new habits. At the heart of China’s new media landscape is online social media. A 2016 survey by China Internet Network Information Center identified nine reasons people tend to use social media. The most important reason was communicating and staying connected with friends, which was cited by 72% of respondents. Over half of the respondents also said they use social media for following news events in real time, focusing on their personal interests, searching information on work- or study related topics, and sharing their own knowledge with others. Other common responses included using social media to make new friends, to comment on news stories and to find potential clients for their businesses. About a fourth of respondents also said they use social media to ‘find a sense of belonging’. Like elsewhere in the world, using social media has clearly become a central aspect of life for many Chinese, who are utilising it for both material and emotional purposes.  

**1.2.1 Printed media struggling to reinvent itself**  

As in other parts of the world, traditional media channels are strongly challenged by digital ones. Chinese now spend considerably more time on mobile phones than reading print newspapers and magazines. According to a 2016 report published by the Chinese Academy of Press and Publication, people spent an average of 13 minutes per day reading printed newspapers, while daily mobile phone usage averaged 74 minutes.
According to the Report on Development of China’s Media Industry 2016, the nation-wide retail sales volume of newspapers of all categories fell by 41% from 2014 to 2015, with the largest decline registered for city newspapers. In early 2017, two major print publications, Beijing Times and East Morning Post in Shanghai, ceased publication. Beijing Times had previously been the leader of the Beijing local newspapers market, with a readership averaging 1.6 million people. These closures are far from the only ones; the year 2014 saw the discontinuation of more than 20 print newspapers and magazines only in Shanghai, a trend that is likely to continue in the future, not least due to the growing adoption of personalised online news channels (further discussed in Section 1.4). The same downward trend, but of less severe magnitude, is indicated by data on printed (as opposed to sold through retail channels, as above) volume of newspaper, shown in Figure 2.

**Figure 2. Printed volume of newspaper (2010-2015) and growth rate.**

![Graph showing the printed volume of newspapers from 2010 to 2015 with growth rates indicated.]

Source: National Bureau of Statistics of China

The mindset shift underlying the decline in printed newspapers is summarised by one of the focus group participants of this study: ‘Printed newspapers is the last place where I would be looking for news’, he said, adding that news tend to have already been spread through news apps and other online channels when they appear in printed newspapers.

This is not an isolated preference; according to a report by China Internet Network Information Center, 61.9% of Chinese internet users read news online everyday, with 47% of them reading full articles. Users’ social network has a significant impact on the news stories they choose to read, leading to media outlets increasingly evaluating news stories by their shareability.

The news industry has responded through a combination of consolidation and digitalisation. In 2013, for example, the government-led media company The Shanghai United Media Group was established as a response to the changing media landscape. While the company discontinued or merged several print newspapers in Shanghai, it also launched online projects and employed journalists and editors who had previously worked for the print media. The Shanghai United Media Group has launched highly successful news websites and mobile applications including Jiemian and The Paper. The group also utilises social media, such as Weibo and Wechat, to widen its outreach. Furthermore, The Paper has established an English-language sister website, Sixth Tone, seeking an international audience. A 2016 report released by the China Internet Network Information Center (CNNIC) concludes that traditional and new media are now being increasingly integrated, with most traditional publishers opting for a combination of online and offline formats, or moving online
Despite the downward trend of printed media, the format is far from obsolete. In 2015, 1,906 newspapers were still being published, with a total revenue of 62.6 billion CNY. The same year, 10,014 magazines were published, with a revenue of 20.1 billion CNY. Physical media formats which have not seen the downward trend phasing printed newspapers and magazines include formats used for advertising in public spaces, including public transportation. Formats commonly used for advertising in Chinese cities include billboards on metro train platforms and videos in metro trains as well as taxis.

1.2.2 TV and radio in search of new formats and audiences

Similarly to print media, TV and radio are also struggling to stay relevant in the new media landscape. As shown in Figure 3, the average time of TV per day has declined in every cohort except for 65-and-above. Importantly, this does not mean that young Chinese are watching less than they used to, only the content and channels have shifted from television to online and mobile. Additionally, the decline in TV watching is less dramatic than that of print news, discussed above.

![Figure 3. Average time of TV watching per day (2011-2015)](image)

While CCTV (China Central TV) and most provincial TV channels have been losing market shares, there are also winners: Hunan TV and Zhejiang TV are examples of channels that have successfully connected with younger audiences through social media and successful program formats such as ‘Where Are We Going, Dad?’ (Hunan TV) and ‘Hurry Up, Brother’ (Zhejiang TV). Radio has, like TV, lost popularity to new media. However, there is one place where the Chinese are tuning in more than before: the car. As personal car ownership is increasing, radio audiences have grown in certain cities. Since the radio is a regional media channel, the statistics vary across areas. According to a 2015 study, radio audiences were growing in 43% of the 35 cities observed. On average, Chinese spend 8 minutes listening to the radio.
1.2.3 Mobile channels and formats dominate the new media landscape

The global shift in how content is consumed, from desktop computers to mobile devices, has gone further in China than most other places (see Section 1.2 for supporting statistics). The country also stands out internationally with high mobile usage rates amongst older generations. Figure 4 gives an overview of the usage rates of different media and highlights the prominent position of mobile devices.

![Figure 4. Daily usage of different media (2015-2016)](image)

Though mobile-first social media platforms have proliferated, the largest ones are WeChat and Sina Weibo:

- **WeChat**, released by Tencent in 2011 as a mobile successor of its highly successful desktop-based messaging software QQ, has become the pinnacle of Chinese social media society. The platform connects over 846 million monthly users. It is discussed in further detail in Section 1.2.4.

- **Sina Weibo**, previously the dominant social media channel and microblogging network, has maintain a large user base of 360 million monthly users, despite having become overshadowed by WeChat. While WeChat has preliminary been the place for communication in smaller circles, Weibo has been the preferred platform for public discussions and sharing. As one of this study’s interviewees put it: ‘I connect with my friend over WeChat, but if I want to know what everyone is talking about at the moment, I go to Weibo’. Most news sources and brands have an official Weibo account. The network is often referred to as the ‘Chinese Twitter’, but its multi-faceted platform is more complex than its Silicon Valley relative. There are easy trend tracking pages, a medal rewards system, and personalised style templates for users to stay engaged with. Though Sina Weibo started as a web service, 91% of its active users prefer to use it through their mobile phones.

These and other mobile channels are becoming the go-to places for news consumption. A 2016 study by China Internet Network Information Center reported that three-fourths of respondents were using WeChat for the latest news, half read on mobile sites through their phone’s web browser, and a little over a third used Weibo and news apps such as Jinri Toutiao or Daily Express. (See Figure 5 below.)
1.2.4 WeChat a ‘Swiss army knife’ of Chinese digital media

As noted above, one distinct feature of the Chinese digital media landscape is the dominant position of one ‘super-integrator’, the all-purpose application WeChat. WeChat differs from western social media in its degree of integration; users can do virtually everything without leaving the application. Three central features of WeChat are instant messaging, ‘official accounts’, which are similar to blogs or newsfeeds, and ‘moments’, which are similar to Facebook or Instagram posts. In addition to these features, WeChat has many other functions. Noteworthy developments related to WeChat include:

- **Users’ social circles are growing.** In 2016, almost half of WeChat users had more than 200 contacts on the application, when in 2014 this had been the case for less than 15% of users. The change indicates that the small social circles that WeChat initially offered as an improvement over Sina Weibo’s more public and often chaotic discussions, have grown.

- **Work-related communication in increasing.** According to the WeChat User & Business Ecosystem Report 2017, 80% of WeChat users are now using the app for work purposes. Over half of users claim that their new contacts are mostly related to work – probably because they have already established a network of friend contacts. **31** Despite the growing work-related use, WeChat’s ‘moments’ feature remains a private sphere for most users. **32** More than 60% of respondents in a 2017 report said they preferred to see personal posts by their friends rather than work-related posts among moments.

- **Companies are reaching WeChat users through official accounts.** In contrast to the communication within an individual’s WeChat friends circle, the platform’s ‘official accounts’ can be followed by anyone. These accounts can, despite the name, be used by individuals as well as by companies or organisations to publish articles and other content. 79.3% of WeChat users have subscribed to at least one official account, and the average user reads 6 articles posted on such accounts each day. The way to attract new readers to an official account is through likes and sharing by current followers; as much as 80% of reading traffic comes through what friends are sharing. **33**

- **Sponsored posts have become a fine-grained approach to reaching consumers.** In January 2015, ads in the form of sponsored posts were introduced among moments. Users are targeted with these ads based on their own and their friends’ profiles, including which sponsored posts friends’ have interacted with. **34**

- **WeChat is struggling to break into western markets.** The success of WeChat has raised speculation in the West about similar multi-purpose applications becoming the future norm. While some of its features and central ideas are adopted in western digital media **35**, however, WeChat has been struggling to break into markets outside China, and has met international concerns on censorship and the centralised and ‘all-in-one’ nature of the platform.

- **Continuous government pressure.** While WeChat is operated by a private company, Tencent, the Chinese government exerts considerable influence over it. For example, Tencent was in 2013 put under pressure to impose a fee for each
instant message sent, as the state-owned mobile operators faced a plummeting market for SMS text messages. The idea strongly upset WeChat’s users, and was never implemented.\textsuperscript{36}

- **Growing concerns with fake news and filter bubbles.** The popularity of using WeChat’s ‘moments’ feature for distributing information has led to some concerns on the social impact this may have, such as the increased spread of ‘false news’ and the ‘grouping effect’ of users becoming too focused on validation from others\textsuperscript{37} – similar to discussions that can be observed in the West.

### 1.2.5 Video gaining a larger share of online content

Professionally produced, as well as the growing amount of user generated, video has expanded its share of users’ attention.\textsuperscript{38} Netizens can access legal versions of local and other TV shows through sites such as Youku and iQiyi. Smartphones have made the process of recording and editing videos simple, and sites such as Meipai and Miaopai allow users to upload and interact around short video clips. Miaopai alone saw an increase in views of its content of 233% in one year, reaching 1.7 billion views in 2016.\textsuperscript{39}

While the growing importance of video is a global trend, a phenomenon that stands out in the Chinese context is streaming of live-video. Live streaming reached 186 million users by the end of Q1 2016. The highest percent of users were aged 25-30, at 30%. Users under 24 years old accounted for 24% of live streamers while those aged 31-35 accounted for 22%. A large majority of users, 65%, were male and 45% of users reported spending one to two hours per day on live streams.\textsuperscript{40}

An entire ecosystem of players and services has sprung up around the phenomenon, with individuals as well as professional crews providing information and entertainment through platforms such as 9158 and YY, the latter of which had 122 million monthly active users in July 2015.\textsuperscript{41} What makes the format so sticky is the constant and live interaction among viewers, and between hosts and viewers. Viewers can buy ‘virtual gifts’, such as virtual flowers, which they can send to hosts that they like, who in turn can exchange them for money.\textsuperscript{42} Thus the virtual gift giving provides the foundation for an economy around live streaming, allowing viewers to pay even very small amounts for content and providing the means for content creators to earn money.

Live streaming has also become a popular format for product placement and content marketing. As an example, immediately after a live-streaming session on Meipai, run by the Chinese celebrity Angelbaby and featuring a Maybelline lipstick, the company sold over 10,000 units in two hours.\textsuperscript{43}

### 1.2.6 Crowdsourced content powers platforms for news

Jinri Toutiao, meaning ‘Today’s headlines’, is a mobile app which provides personalised news feeds for Chinese users. The app relies on an artificial intelligence-based algorithms to analyse users’ in-app habits and curate crowdsourced content relatable to the viewers. In 2016, Jinri Toutiao’s experienced explosive growth as monthly active users reached 261 million from 176 million year-on-year in the first quarter. The total number of articles on the site reached 45.98 million, four times the amount of the year prior. Total page views reached 334 billion, three times the years prior and total time users spent on the app tripled in the same time frame.\textsuperscript{44}

The company offers financial incentives for users who submit content.\textsuperscript{45} Their business model allows writers to earn revenue from ads published next to their text. Recently, the company introduced contracts to select writers guaranteeing them monthly payments of 10,000 CNY per person, or 20,000 CNY per team.\textsuperscript{46} Internet powerhouse Tencent followed with its own open media platform in 2017. Jinri Toutiao in 2016 introduced its ‘Xiaomingbot’, an artificial intelligence-driven tool generating automatically written text and selecting accompanying images, through a combination of machine learning and techniques for natural language processing and visual image processing. ‘Xiaomingbot’ was developed jointly by Jinri Toutiao and Peking University, and was
showcased during the Rio Olympics during which it produced 450 articles. Other Chinese companies engaged in automatic journalism include Tencent with its robot ‘Dreamwriter’, and Xinhua News with its ‘Kuaibi Xiaoxin’, both of which are used primarily for covering finance and sports.

1.3 Media’s roles in travel

The following sections discuss the roles of various Chinese media channels in the inspiration, planning, booking, and experience phases of travel.

1.3.1 Traditional travel media remain relevant and inspire travel ideas

Offline media continue to influence travel decisions, especially at the inspiration stage. One example is glossy travel magazines, which stood for 14.7% of total Chinese magazines sales in the first half of 2016. The most popular travel magazines include Chinese editions of international titles such as Condé Nast Traveler and Travel + Leisure, as well as domestic titles such as China National Travel.

TV series constitute another example of offline media with the potential to influence travel decisions among Chinese audiences. There have been observable examples of TV series increasing the attractiveness of certain destinations. For example, the popularity of Game of Thrones in China has led to Northern Ireland, used as a filming location, becoming a highly desired destination. Similarly, the Chinese reality TV show Sisters Over Flowers boosted Chinese tourism to Turkey significantly. It should be noted that, despite the fact that TV as a channel is on its way down, TV series as a format retains high popularity. This includes TV series distributed over online streaming services, as well as downloaded illegally.

1.3.2 Social media has expanded its role in the inspiration and research stages of travel

Social media has a significant impact on travel-related decision-making, especially in the demographic of young people. According to a 2015 survey, social media platforms are considered useful or very useful for trip planning by 90% of respondents; fewer than 2%consider social media not useful. In another study, 74.6% young people said that social media is a strong source for travel inspiration. A third study, by the market research company TNS, concluded that two out of three get inspired to travel by the experiences shared by people they know on social media.

Such inspiration does not only come through consumers’ WeChat and Weibo friends circles; one study found that over half of young Chinese actively search for other travellers’ experiences and reviews on social media before planning a trip. Only 8% of young people would not seek out any information on social media beforehand.

Social media is used in all stages of travelling. Before a trip, users seek information in form of reviews and experiences shared by others on platforms like WeChat and Weibo. They also buy tickets and products through travel agencies and other websites selling travel-related products. During the trip, social media is used to obtain real-time travel information online, to share pictures and experiences on social media, and to search for travel-related products. After the trip, social media is utilised to share travel experiences and provide other prospective travellers with useful tips. Users also write reviews about attractions and hotels on social media, thus influencing future travellers in their choice of destination.

Travel-related social media use is no exception to WeChat’s dominance of the Chinese digital media landscape. Its multi-purpose platform enables users to find travel products, services and content shared by other individuals. The application can be used for booking hotels, checking the weather, buying tickets for trains and flights, and many other travel-related functions. It is main travel related use, however, is the gathering of inspiration through word of mouth, for example by looking at photos shared by friends that are travelling.

Qilv is WeChat’s first travel magazine. Its official account had 1.21 million followers with an average read volume of 80,895
as of March 2016. Its articles focus on travel planning recommendations and travel products for tourists. For example, an article introducing attractions in the Jiangsu province gained more than 100,000 page views.

The popular microblogging platform Sina Weibo also hosts a significant amount of travel-related content. More than 80% of the users posting travel-related content on Sina Weibo belong to the age group of 19 to 35.57

1.3.3 Tourism businesses increasingly skilled at engaging audiences through social media

Appearing in a popular TV drama can make a travel destination become fashionable virtually overnight. Increasingly, destinations and tourism businesses are producing their own shows and disseminating them through social media to attract tourists. For example, Beijing’s Forbidden City achieved online celebrity status after launching a popular documentary called Masters in the Forbidden City. The promoters also designed an emoji package using images of the emperor in hopes of connecting with young social media users.

Destinations and businesses are also increasingly seeking to engaging their audiences rather than simply communicating with them. Jiangsu Tourism Institute, for example, used gamification in a travel campaign on WeChat, rewarding travellers who shared photos of different local dishes described in articles posted on the WeChat account. The campaign achieved over 140 million page views58.

The live-streaming trend described in Section 1.2.5 has become popular in travel too, leading to a phenomenon commonly referred to as ‘live video streaming plus travel’. Travel agents and individuals have taken to life-streaming to showcase destination in real-time, attempting to influence users’ buying decisions. Travel agency Qunar teamed up with livestreaming platform Douyu to develop a travel program for Chinese viewers in May 2016. The partnership released 16 live three-hour broadcasts promoting Qunar’s brand with an average viewership of 100,000.59 Tuniu, Sina and other Chinese travel companies have taken to this successful model for tourism promotion.

Travel platforms who utilise live stream video typically advertise through celebrities and digital influencers. For example, an online celebrity streamed live during the opening day of Shanghai Disneyland. People tuned in to see the opening scene real-time and were able to buy tickets direct through a link on the screen.60 As one user of a live stream platform commented, ‘it’s easy to know if it’s worth trying to travel to a place by watching the live stream. I like it’.61

1.3.4 Online travel influencers share experiences and practical advice

According Weixiaobao, a third-party platform ranking official accounts on WeChat, the official account Azinan was the top travel influencer throughout the network as of March 2017.62 The account has 1.42 million followers with an average read volume per post of 73,209. Posts focus on authentic travel experiences, for example related to local lifestyle and food. She also posts photos and information about local fashion, styles, and stores. One article about travel to Japan and Orlando, Florida, was read by over 100,000 WeChat users. The second-ranked influencer is the official account of the domestic travel platform Mafengwo, which has 440,000 followers with an average read volume of 36,949. It posts information about new, cool destinations and ‘fresh’ experiences, as well as advice on where to travel without having to apply for a visa beforehand. An article about travel to Sertar county in western Sichuan was seen over 90,000 times. The article boasted beautiful scenery and Buddhist culture.

According to a report on the top 100 travel-related influencers on the WeChat platform, based on the amount of readers and the volume of articles, 62% were social media accounts of individuals, while OTAs accounted for 10%.63 Other influencers, such as traditional travel agencies, had shares below 10%.

Based on reader volumes per article in March 2017, the most important travel influencer on Weibo was Tamaxingzhe, an individual user working in the travel industry. He has over 3 million followers, and his travel-related posts are reposted
thousands of times. His popularity rests on the fact that he posts practical and useful advice on what to do and avoid at different destinations. The second- and third-largest influencers were also individuals whose posts on topics such as food and wedding travel garnered thousands of thumbs ups and reposts.

1.3.5 Chinese OTAs are more integrated than their western counterparts

While vertical platforms focusing on one particular travel service dominate in the West, OTAs integrating a wide range of services are popular in China. Online travel resources are concentrated in OTA platforms such as Ctrip and Qunar, which can be used to do everything from itinerary planning to hotel booking.\(^64\) When the executives of these companies speak of their strategies, they tend to use formulations such as ‘one-stop solution for the total needs of the travel industry’ and ‘catering to travellers’ every need’. Qunar is even diversifying into the aviation industry, while Ctrip is investing in cruise ships.\(^65\)

Chinese OTAs do not rely solely on an online business model. Particularly Ctrip has a huge team of customer service personnel that helps with bookings and assists customers in changing or refunding bookings if needed. Furthermore, some OTAs have started to set up physical help centres that can be visited by travellers at overseas destinations, testifying to the need for offline touchpoints in addition to the online ones.

The other important type of travel related online channel in China is social media channels centred on user-generated content, such as reviews, travel notes, and photos. Many of these sites are, however, also attempting to transition themselves to become OTAs.

The largest Chinese OTAs include Ctrip, Qunar, Elong, Tuniu, Lūmama and Tongcheng Travel. The most popular travel-related social media platforms include Qiongyou, Mafengwo and Tripadvisor (now known as Maotuying in Chinese). It should be noted that there is some overlap between OTAs and user-generated content platforms, as OTAs are commonly used to share reviews and other content. Additionally, the OTA market is less diverse than it might appear, due to high ownership concentration – Ctrip, and to a lesser extent Baidu, own large shares of competing OTAs. This phenomenon has become even stronger in recent years, with Ctrip acquiring a 37.6% share in Elong in May 2015. Ctrip also obtained 45% interest in Qunar in October the same year, following a share swap through which Baidu simultaneously obtained a 25% share in Baidu.\(^66\) Ctrip by then already owned shares in Tuniu, and has also invested in LY.com, Tujia, and U-tour.\(^67\) Several of the top players in the online travel media market are thus have major stakes in each other; that the leading OTA Ctrip is a dominating shareholder in what is supposed to be its closest competitor – Qunar – is one of the most remarkable examples of this.

Below is an introduction to the platforms and services of the most popular platforms:

- **Ctrip** is one of the largest and most comprehensive online travel agencies in China. It had 18.2 million monthly active users in 2016\(^68\), and its website is ranked 232 among Chinese websites by the online metrics service Alexa.\(^69\) Ctrip, owned by Shanghai Ctrip International Travel Service, offers a variety of travel-related services including domestic booking services for hotels, flights and tour packages. It also operates internationally, providing travel services for Chinese citizens abroad and foreign citizens seeking to visit China. In 2016 Ctrip acquired the European travel search engine Skyscanner, which accounts for 5-10% of Ctrip’s revenue as of Q4 2016.\(^70\)

- **Qunar** is another popular online travel agency. It is known for providing low prices and discount deals on flights and hotels. Qunar had 24 million monthly active users in 2016.\(^71\)

- **Elong** is a hotel and flight booking platform, for domestic as well as international travel services. It ranks 779 among Chinese websites.\(^72\)

- **Tuniu** is an online travel agency providing a wide variety of travel-related products and services. These include travel services for groups and companies, independent travel packages, hotel bookings and visa services.
Lümama (sometimes referred to as Lvmama) is a travel website geared towards those who want to travel independently. It is catering to the increasing number of Chinese people who do not want to travel in tour groups. The website provides travel guides for independent domestic travel. They also offer booking services for tourist attractions.

Tongcheng Travel is another leading OTA, offering a variety of services from train ticket bookings to custom-made travel packages.

Qiongyou is a travel website and application focused on user-generated content, ranking 279 among Chinese websites and with a predominantly female userbase in the age-group 25-34. Users can search for reviews and travel guides produced by other users and create itineraries based on their interests. Qiongyou is used to review and research destinations and to customise itineraries for independent travel. The customisation function automatically comes up with complete travel plans based on requirements indicated by the user (and, behind the scenes, based on big data analysis of the large number of travel reviews on the site).

Mafengwo is another website geared towards independent travellers, containing destination guides, travel advice and other information. It is aimed towards ‘local’ travel tips and advice, with destinations including more remote places ‘off the beaten path’. A similar attitude has long been common in the Western travel industry, with businesses like Lonely Planet making their fortunes by offering ‘authentic’ experiences. Mafengwo reflects the increasing interest among Chinese travellers to reject the traditional tour-group travel for more customised itineraries. The website ranks 282 among websites in China.

Tripadvisor adopted a new Chinese brand in 2015: Maotuying. The new name combines the characters for ‘journey’ and ‘owl’, the latter of which is seen in TripAdvisor’s logo. The brand Daodao, which had previously been used for the Chinese version of Tripadvisor, was subsequently scrapped.
### Table 1. Ranking of online travel platforms by Alexa (Amazon)

<table>
<thead>
<tr>
<th>Travel sites</th>
<th>Rank among all websites in China</th>
<th>Share visitors from China</th>
<th>Daily time users spend on site</th>
</tr>
</thead>
<tbody>
<tr>
<td>ctrip.com</td>
<td>232</td>
<td>87%</td>
<td>6:53</td>
</tr>
<tr>
<td>qyer.com</td>
<td>279</td>
<td>76%</td>
<td>4:13</td>
</tr>
<tr>
<td>mafengwo.cn</td>
<td>282</td>
<td>88%</td>
<td>5:14</td>
</tr>
<tr>
<td>alitrip.com</td>
<td>415</td>
<td>96%</td>
<td>4:39</td>
</tr>
<tr>
<td>tuniu.com</td>
<td>527</td>
<td>93%</td>
<td>2:45</td>
</tr>
<tr>
<td>8264.com</td>
<td>643</td>
<td>98%</td>
<td>2:47</td>
</tr>
<tr>
<td>qunar.com</td>
<td>682</td>
<td>93%</td>
<td>8:02</td>
</tr>
<tr>
<td>elong.com</td>
<td>779</td>
<td>92%</td>
<td>4:56</td>
</tr>
<tr>
<td>tripadvisor.cn</td>
<td>1,085</td>
<td>94%</td>
<td>3:42</td>
</tr>
<tr>
<td>lvmama.com</td>
<td>1,317</td>
<td>95%</td>
<td>4:06</td>
</tr>
<tr>
<td>jpyoo.com</td>
<td>1,619</td>
<td>100%</td>
<td>4:58</td>
</tr>
<tr>
<td>cncn.com</td>
<td>2,016</td>
<td>95%</td>
<td>2:08</td>
</tr>
<tr>
<td>travel.news.cn</td>
<td>2,249</td>
<td>76%</td>
<td>1:43</td>
</tr>
<tr>
<td>3487.com</td>
<td>2,343</td>
<td>100%</td>
<td>4:12</td>
</tr>
<tr>
<td>beiii.com</td>
<td>2,630</td>
<td>100%</td>
<td>4:09</td>
</tr>
<tr>
<td>doyouhike.net</td>
<td>3,447</td>
<td>91%</td>
<td>5:12</td>
</tr>
<tr>
<td>16fan.com</td>
<td>4,085</td>
<td>81%</td>
<td>2:24</td>
</tr>
<tr>
<td>bytravel.cn</td>
<td>4,395</td>
<td>95%</td>
<td>2:00</td>
</tr>
<tr>
<td>nettvl.com</td>
<td>5,117</td>
<td>98%</td>
<td>1:45</td>
</tr>
<tr>
<td>xialv.com</td>
<td>5,225</td>
<td>98%</td>
<td>2:10</td>
</tr>
<tr>
<td>shanghaidisneyresort.com</td>
<td>8,963</td>
<td>73%</td>
<td>5:16</td>
</tr>
</tbody>
</table>
1.3.6 Growing demand for channels offering customisation of travel experiences

The way Chinese consumers think about travel is changing. The old stereotype of Chinese people travelling in large tour groups is being challenged by the emergence of an increasing number of independent travellers seeking unique experiences. According to the Independent Travel Report 2016, the growth rate of the Chinese independent travel market reached 16.7% in 2016. This has given rise to the emergence and growth of channels that help consumers tailor experiences to their personal tastes.

The current trends of personalised travel design and customised itineraries are focused on the growing Chinese middle class, which is expected to reach 360 million in 2020. According to the CEO of one ‘tailor-made travel’ platform, Liurenyou, members of the Chinese middle class travel twice a year and spend up to 100,000 CNY on travel.\(^77\) This growth is already reflected in the growth of new services catering towards middle class travellers: the aforementioned Liurenyou reported a 500% increase in their tailored travel business in 2015. Other big OTAs have also recently started offering tailor-made travel services. For example, Ctrip launched a tailor-made travel platform in 2016 and reported that their orders during the Spring Festival increased fourfold as a result.

1.3.7 OTAs and start-ups experiment with data mining and machine learning techniques

As in other parts of the world, ‘big data’ mining and machine learning, including artificial intelligence, have become a growing force in the online tourism services industry. Companies such as Ctrip, eLong and Qunar harness such technologies to improve their offering for Chinese travellers.\(^78\)

Applications include an advanced trip planning tool provided by Qiongyou.\(^79\) Starting from a few basic selections made by the traveller, including trip length and one or a few attractions the traveller wants to visit, the planning tool suggests a detailed trip itinerary that fits the requirements. Several Chinese start-ups have introduced similar online tools. Other applications of analytics and machine learning include improved and automated customer service, forecasting, personalised recommendations, and dynamic pricing.

Although such experimentation is not unique to China, it is worth noting that very large public and private investments, as well as preferential policies, are directed toward the sector. The State Council, the executive branch of the Chinese central government, issued guidelines where it formulated the goal of building a domestic industry in artificial intelligence worth almost US$ 150 billion by 2030. Possible future implications of the ‘AI:ification’ of the Chinese travel industry are discussed under Section 1.4.

One application of analytics and machine learning that appears to be unique to the Chinese context is that of ‘social credit’. The concept was introduced as a government initiative aimed at giving every Chinese citizen a credit score based on their activities on platforms of eight tech companies, including Alibaba and Tencent. Those who pay bills on time and consume responsibly would get a higher score, and these consumers would be able to access credit even without collateral or financial history. It has been speculated that the scheme could also be used for social engineering purposes and political control. Although it was reported in July 2017 that the initiative has been put on hold, a similar scoring system is used by individual companies, particularly Alibaba, to extend credit and allow customers to, for example, rent cars without a deposit.\(^80\)

Using other new technologies to enhance travellers’ experience is also gaining momentum in China. One example is smartphone apps which can be used as augmented reality (AR) guides, providing travellers with information about buildings and other sights they point their smartphone camera at.\(^81\) Another application helping travellers is instant speech translation, in the form of smartphone apps or portable devices; the relatively weak language skills, even among young Chinese, drive the application’s popularity.\(^82\) Some Chinese hotels have introduced robots to replace staff, or voice control systems in rooms.\(^83\)

1.3.8 Virtual reality used for immersive travel storytelling
Virtual reality (VR) technology has made an impact on the tourism industry for its first-hand interactive experience. VR puts the potential tourist in the heart of the action—whether a roller coaster ride at a theme park or a thrilling sporting event. While the application is still in its earlier stages, the concept of sensual stimulation for destination marketing is powerful.

January 2013 to March 2016 displayed a 8.6% increase in VR investment across the travel industry. VR allows tourism organisations the opportunity to give potential tourists an immersive viewing of their destination. Viewers learn about the location visually and aurally. Eliminating uncertainty by giving viewers realistic expectations supported by ‘tangible’ information. Studies show that the more sensory stimulation provoked by promotional material, the higher the chance of a sale.84

Shangri-La launched a VR project in 2010, leading to the first integrated virtual reality experience for hotel sales.85 Marriott also released its own in-room virtual reality experience, called ‘VRoom Service’ and designed for the next generation of travellers. Young, tech-savvy travellers are attracted to booking platform Kongkong for its VR hotel promotional experience.

In December 2015, travel agency Zanadu launched Travel VR, the first immersive domestic travel app. Travellers can ‘visit’ hotels and tourist destinations within the app before making a purchase decision. Travel VR amassed over 7,000 downloads within the first three months of its release.86 Zanadu continued to open a showroom in Shanghai offering in-house VR travel experiences.

1.3.9 Planning in the new media landscape

Figure 6 provides an illustration of the search volume of words frequently used in travel-related searches on Baidu, the dominating search engine among Chinese internet users. It can be seen that searches for recommendations of attractions dominate, and are followed by booking-related search phrases. The relatively big search volume for “discounted tickets” suggests the importance of making a good deal.

On average, it takes Chinese travellers 11 days to plan their travel.87 They tend to use their spare time for planning in a fragmented way rather than deciding everything at once. According to one study, 57% of Chinese travellers plan their travels at least two months in advance.88 During the planning stage, travellers seek information on five aspects: prices, travel tips, food, traffic, and internet word of mouth, as in reviews and evaluations of different service providers.89

Chinese travellers commonly use two or three different channels to seek information prior to the trip.90 The main information sources for people planning their travels are online accommodation websites and recommendations from friends or colleagues. Tour guides, reviews, and comments on social media are also important in the planning stage. According to the Chinese International Travel Monitor 201691, the preferred payment method for outbound tourists is UnionPay, with 66% of outbound tourists stating they like using it. UnionPay is followed by cash payments, liked by 41% of respondents, and Alipay, liked by 31%.
1.3.10 Digital channels influence Chinese travellers’ shopping abroad

Shopping continues to be a favourite activity for Chinese travellers abroad. Many travellers do online research of what they should shop at the destination before they leave home. E-commerce sites therefore have an important role in the planning stage. Travellers tend to do product and price comparisons on platforms such as Xiaohongshu to get a better idea of how much items cost in each country. They also look toward highly-regarded fashion bloggers like Maimaijun for shopping and fashion advice prior to their trip.

Chinese travellers don’t just shop for themselves; ‘daigou’, or professional shopping for others, has become a big phenomenon. These professional shoppers travel or live abroad and buy products which have been ordered by others back home. Goods bought through daigou are typically luxury items which are heavily taxed in China and hence less expensive to obtain abroad. These foreign goods are a status item in China and a source of profit for the professional shopper. Popular platforms for daigou include Xiaohongshu and Taobao.

As Chinese travellers shop they share reviews and images of their purchases to impress friends back at home. The captivating posts motivates views and influences them to choose the same destination as the sharing traveller. The power of this social influence has been recognised by advertising companies on Weibo. Currently, over 400,000 businesses on Weibo target potential travellers in order to impact their purchasing decisions.

1.3.11 Traditional channels remain important for booking

Although Chinese travellers are increasingly using mobile devices to book their trips, the market is still dominated by websites rather than smartphone applications. Most Chinese travellers use the websites of online travel agencies for booking. A 2016 Ipsos survey found that 74% of respondents used OTAs for hotel bookings. 69% of respondents accessed the travel agency websites on either mobile devices or computers to make their bookings, while only 10% made bookings via mobile applications of travel agencies.

The trend toward booking through mobile apps is clear, however, the use of mobile devices in travel booking has been increasing rapidly, with the online travel agency Tongcheng Travel reporting that 80% of bookings during the 2015 New Year’s holidays were made on mobiles. According to one report, China’s level of smartphone use for travel booking is the second-highest in the world, after Indonesia.

Offline travel agencies still have a presence in China, although they are increasingly losing out to online options. 25% of the Chinese outbound tourists responding to the Canadean Consumer Survey in Q4 2015 said they still use offline travel agents for booking. The offline travel agencies are mainly sustained by the older generations, who continue to use them. However, with the majority of the population now having access to the Internet, the Canadean report concludes that the future of the travel booking market is online.
A 2014 report concludes that frequent travellers, who fly three to five times a year, most commonly used the websites Ctrip and Qunar to book their flight tickets. In hotel bookings, most travellers went for budget options, with economy hotels accounting for 83% of bookings. The most commonly used online platforms for searching travel-related products were Ctrip (66.1%), Qunar (50.8%) and Tuniu (38.1%).

1.3.12 The online footprint of Chinese travellers influences others

Sharing travel experiences through mobile devices has become common practice for Chinese travellers. Almost 80% of travellers do so through WeChat, while one tenth as many share travel experiences on Weibo. Such digital footprints are used by prospective travellers to get an idea of what a trip might look like.

A study that investigated 29.6 million travel posts by more than 10,000 Chinese travellers categorised travellers into five groups based on the content they posted:

- Business travellers were sharing more than others about hotels, traffic, service, and aircraft punctuality rates.
- Self-driving travellers placed emphasis in their social med posts on car club activities, making new friends and enjoying the freedom of travel.
- Package tour group travellers were more likely to share information about travel attractions and destinations.
- Luxury Shoppers held a strong social media presence discussing topics such as leather goods and latest fashion trends.
- Backpackers focused in their social media posts on sharing travel experiences, explorations of local cultures, and natural scenery.

The most common photo categories shared online are natural scenery, historic attractions, selfies, and culinary experiences. Chinese travellers are more inclined than their western counterparts to snap photos from their smartphones while travelling.
Analysis revealed that travellers visiting distant destinations such as Europe or North America posted more often than others, 6 times per day on average.\textsuperscript{106}

1.3.13 Chinese travellers more likely than western travellers to write reviews

Writing reviews after travelling is more common among Chinese than among western travellers; according to a report from Ctrip, about half of the site’s users write reviews after a trip. Naturally, reading reviews written by other users is even more common than writing them, as over 90\% of Ctrip users said they go through travel reviews before making decisions. In addition to online travel agencies like Ctrip, reviews are also shared on platforms for user-generated content, such as Qiongyou. More than 60\% of Ctrip reviewers submit their reviews on a mobile device. 20\% of users both write reviews and post pictures during their trip\textsuperscript{107}.

1.4 The future role of online and offline media for Chinese travellers

- **The growing individualisation of travel will enable 'long tail' media strategies.** As more and more Chinese travellers are seeking unique experiences in accordance with their own individual tastes, the demand curve extends into a ‘long tail’ of smaller and more specialised travel products. This provides opportunities for individual tourism product suppliers, who can find sufficient markets by focusing on specific niches and less crowded media channels.

- **Crowdsourcing and artificial intelligence risk reinforcing existing preferences.** The reliance among many Chinese travellers on recommendations and the ‘wisdom of the crowd’ rewards those attractions or products that are already doing well. When artificial intelligence is used to make recommendations, it is usually based on information extracted from reviews or preferences of other, ‘similar’ travellers, or a combination of the two. In each case, previous preferences are reinforced. There is therefore a strong possibility that alternative media sources will become increasingly important for smaller tourism businesses to reach out.

- **The distinction between online and offline channels will blur.** While it is likely that print media will always be seen as a channel of diminishing importance for travel planning, it is also possible that the distinction between online and offline will matter less and less. Electronic papers could, for example, combine the best of both formats. Technologies such as augmented reality and image recognition could increase print media’s role beyond the inspiration phase by enabling business models that combine the physical reading experience with online information gathering and booking experiences. A prospective traveller could, for example, hold up her smartphone over a photo in a travel magazine to see a video of the destination, or to immediately book a ticket. In such a scenario, tourism businesses will need not only to work with multiple touchpoints, online and offline, but to exploit touchpoints that combine the two. Experimenting with such possibilities early on could also be a good way for tourism businesses to generate buzz.

- **Immersive formats will increasingly be used for travel storytelling.** As Weibo is already allowing users to upload 360-degree photos, and the adoption of VR equipment is rapidly growing, it is not a big leap to imagine travellers sharing entire VR-based experiences from their trips over WeChat and Weibo. Together with the trend of using VR to market travel products, this means that tourism businesses should start contemplating what a VR-optimised experience looks like.

- **A more discerning and individualistic generation will grow up.** In China’s recent history, each generation Chinese has been better-educated, more urban, more experience-oriented, had a higher disposable income while saving less, and put greater emphasis on the individual expression of personality than the previous. If this tendency continues, it can be expected that tourism product providers will need to connect with individual consumers, live up to higher standards, and distinguish their value proposition more clearly from those of competitors.

- **Flexibility and coping strategies for uncertainty is necessary in an environment of rapid change.** Several of the trends and phenomena described in this chapter were unheard of, and could hardly be guessed, only five to ten years
ago. In the next five to ten years, some of today’s key channels may decline in importance, while others may rise to prominence. The uncertainty induced by China’s rapid change is exacerbated by the uncertainty and lack of transparency of China’s macro and policy environments. The dominance of a few big players in the digital media landscape additionally means that sudden changes in pricing, rules, or formats can have large consequences for individual tourism businesses. The best strategy in working through the Chinese media landscape is therefore to adopt a test-and-improve approach, with the flexibility to adapt to a changing environment. Connecting with Chinese consumers will never be a one-time thing; continuous tweaking and improvement in formats and communication will be needed.
Chapter 2
Online and offline media usage in the planning stage of a trip – based on a survey of Chinese outbound travellers

2.1 Media usage and booking behaviour at a glance

2.1.1 Plugging into the evolving online travel ecosystem

As described in chapter 1, the Chinese online travel information and booking ecosystem is to a very high degree separated from its non-Chinese equivalents. Among the 20 most commonly used channels for travel booking mentioned by the respondents in the survey conducted as part of this study, not a single channel is non-Chinese. Chinese travellers use Chinese online and mobile platforms for gathering inspiration, planning, booking, making shopping lists, as well as staying in touch with friends and making payments during the trip. In order to attract Chinese customers, therefore, European travel product providers need to plug into this distinct ecosystem of social media, payment methods, and booking channels throughout the travel planning process and during the trip. Among booking channels, Booking.com constitutes an international exception; it has been mentioned by several travellers interviewed for this study, and it has a collaboration with Qiongyou which links to its site for hotel bookings.

That the smartphone has, during the last few years, become the infrastructure for much of this online ecosystem can also be seen in the survey results. For example, 55% of respondents prefer to plan and book trips using a smartphone – to be compared with the mere 5.6% who prefer to speak with a person when making a booking. In comparison, only 20% and 24% of online bookings will be transacted through mobile in another two key markets, France and Germany, respectively. During trips, 62% of respondents use their smartphone for finding attractions. A majority also use their smartphone while travelling for chatting, taking photos, finding restaurants, and making payments. Consequently, marketing to prospective travellers in China needs to be optimised for mobile formats.

2.1.2 Where to inspire

A minority of Chinese independent travellers, 45%, decide where to travel only after deciding to travel. The rest, 55%, are always on the lookout for travel inspiration to determine the destinations and activities for their next trip. Being present not only in the planning stage, but also in the inspiration phase, is therefore essential for destinations and travel product providers.
Before deciding on the activities of the trip, 87% of the respondents in this study settle on a destination. The choice of destination, in turn, has a number of influencing factors. While beautiful scenery, good food, and rich culture and history are considered by the respondents the most important determinants overall, there are marked differences between consumer types. The statistic analysis reveals that consumers with a preference for traditional media, such as newspapers and magazines, tend to also have more traditional travel preferences and look for destinations with historic attractions and China-adapted hotels. Those who mostly consume news through mainstream online media channels, such as instant messaging apps, more than others prioritise destination features that are also among the most popular overall: good weather, beautiful scenery, good food, and beaches. Consumers relying more heavily on online communities for information – typically younger and attuned to the latest trends – tend to be attracted to destinations with fascinating local lifestyles. These three media consumption styles also influence attitudes and behaviour in the pre-travel phase in several ways, and are introduced in more detail in Section 2.4. Sections 2.4-2.6 provide comparisons between them in different aspects.

Overall, two types of channels are by far the most important in the inspiration phase. Instant messaging platforms are considered an important channel for information by 71% of respondents, while 67% of respondents consider microblogs to be important sources of information. More specifically, WeChat (instant messaging) and Weibo (microblogging) are considered by the respondents the most important channels for news and information. Both channels are available for marketing.

The shift in news consumption from traditional sources, such as newspapers, to mobile-optimised channels, such as instant messaging and microblogs, means that most people are now consuming information in streams rather than batches. This poses challenges for marketing. As users are able to consume only a small fraction of the information that passes by, the needs to stand out, strike a chord, and communicating the right message in the right channel are greater than ever.

### 2.1.3 Where to inform

When a travel decision has been made and consumers move into the travel planning stage, an entirely different set of sources becomes important. When asked in an open survey question which website they generally get travel information from, a majority of respondents identifies on of the largest OTAs – Ctrip (35% of respondents), Tuniu (16% of respondents), and Qunar (9% of respondents). (See Table 3.)

Only 16% say China’s main online search engine Baidu is the website they generally get travel information from, suggesting that the chance of finding the website of a local tourism organisation of product provider is rather low. Interviews conducted as part of this study (see chapter 3), however, reveal that Baidu is commonly used by travellers when doing research
throughout the pre-travel phase. The reason why only 16% of survey respondents list it as their main source of travel information might be that the search engine is seen as a tool for finding sites with valuable information, rather than as a source of information itself.

The platforms that dominate the respondents’ list of travel information sources – Mafengwo, Fliggy, Qiongyou, and Lümama in addition to the aforementioned OTAs – tend to function as databases of crowdsourced information about destinations and products. Travellers upload reviews, photos, and travel logs for others to view. Achieving a positive image in these channels is therefore a matter not so much of marketing or communication as of a relentless effort to satisfy customer needs. While the importance of monitoring online reviews is not particular to China, doing so in China can be particularly important since many European providers are likely less attuned to Chinese preferences than to preferences of travellers from source markets with a longer history of travelling to Europe.

A majority of the respondents (53%) spend only a few hours doing focused travel research, and a majority also prefers doing the research on their smartphones (55% of respondents). Products that do not stand out get little attention.

The information channel landscape is not static. When asked what platforms they have started to use in the last two years, many respondents mention Zhihu, a question-and-answer platform where travel and tourism are among the topics with a strong activity. Purely travel-oriented platforms mentioned by respondents include Ctrip, Tuniu and Fliggy. Figures 8 and 9 below illustrate rising and declining media channels, respectively.

**Figure 9. Rising media channels**

![Rising media channels](Figure.png)

**Figure 10. Declining media channels**

![Declining media channels](Figure.png)

### 2.1.4 Where to sell

The channels used for booking vary by product type. Going through the home page of the product provider is particularly common when booking entry tickets (46% of respondents), renting a car (44% of respondents), and reserving seats at a restaurant (37% of respondents, with 32% calling the restaurant). OTAs are used across the board, while offline travel agencies are used by between 12% (for accommodation) and 21% (for car rental) of respondents. Meituan/Dianping, which
frequently offers discounts, is popular for booking restaurants (30% of respondents) and entry tickets (22% of respondents). Each of these channels presents product providers with a specific set of challenges.

More broadly, the independent Chinese travellers surveyed fall into four travel booking types. *Traditional agency bookers* prefer to book through traditional travel agencies, either by visiting their physical offices or through their websites or apps. *OTA bookers* rely on platforms such as Ctrip, Elong, Fliggy(Alitrip)/Taobao, Lüma, Huma, Tongcheng Travel, Qunar, and Tuniu. *Direct bookers* contact hotels, airlines, restaurants, car rental companies, and other product providers directly, either through phone or official websites. *Social bookers* use channels with social elements for booking, for example Mafengwo, Meituan and Dianping, Qiongyou, TripAdvisor, and WeChat official accounts. More information about the characteristics of the four booking types can be found in Section 2.5.2.

2.1.5 Whom to target

Differences in travel behaviour and preferences can be indentified on different grounds. Two typologies or segmentations of travellers are presented in this chapter: three different media consumption styles are presented in Section 2.3.5, and four different booking styles are presented in Section 2.5.2. In both cases, the styles depend on underlying variables and have been identified using a statistical method known as multidimensional scaling (explained in Section 2.3.5) of survey responses. The two sets of styles can to some degree be linked to each other (see Section 2.5.6). Different approaches need to be taken when targeting each of the segments, as outlined in Table 2 and Section 2.3.5.

2.2 The survey

As has been noted in the previous chapter, the Chinese media landscape is changing very fast. This is a trend which can be seen all over the world, but is especially noticeable in China. In order to get a deeper understanding of today’s media habits, and how these influence booking behaviour and purchase of travel products, a survey was conducted with 1,853 respondents (after a strict process of filtering out respondents with an response pattern that put into question the credibility of their answers) aged 18-45 in the Chinese cities of Beijing (378), Chengdu (351), Guangzhou (413), Shanghai (355), and Wuhan (356). The respondents have all travelled independently and internationally in the last 24 months and have an interest in Europe as a destination. 53% of respondents are female, and 61% hold a bachelor’s degree.

2.3 General media consumption patterns

Several shifts are seen in media consumption patterns:

- From offline to online
- From desktop to mobile
- From batches to streams

The third shift refers to media – especially printed media – traditionally having been consumed one newspaper or magazine at a time whereas media consumers today are constantly receiving new pieces of information in streams from online channels such as social media and news apps. While these trends define the overall change, media consumers are different and several media consumption styles co-exist. The three main media consumption styles are presented in Section 2.3.5: a traditional style, a mainstream online style, and an online community style. It should also be noted that the Chinese media landscape is to a great extent distinct from the international media landscape, with a separate set of media channels being used. This applies to news channels as well as social media channels and channels for travel information. Especially for social media, this can to a great extent be explained by the government having restricted the access to internationally leading channels early on, which allowed a domestic social media landscape – and a few huge dominating players – to emerge without competition from outside. (More information on the Chinese media landscape can be found in chapter 1.)
2.3.1 From offline to online and from desktop to mobile

Two main concurrent shifts discussed in chapter 1 – a shift from offline to online media and a shift from desktop-first to mobile-first digital media – can be observed in the survey results. When asked which information channels they have stopped using during the last two years, respondents commonly mention *printed newspapers* and *printed magazines*. Many respondents also report that they have left traditional and formerly dominant social media channels such as the microblogging channel *Weibo*, the messaging platform *QQ*, the forum *Baidu Tieba*, social networking site *Renren*, and blogs. Several of these are designed to be used through a desktop computer.

The instant messaging app *WeChat* – the largest social media channel in China – is still on the rise; WeChat is the channel most frequently mentioned when respondents are asked which channels they have started to use during the last two years. The microblogging site *Weibo*, which used to be the dominating social media platform is now making a comeback and is also among the most frequently mentioned channels. The Q&A site *Zhihu* has made a breakthrough in the last few years, offering answers to questions posed by users, including about travel and tourism. Purely travel-oriented platforms among the rising channels include *Ctrip*, *Tuniu* and *Fliggy*.

One clear finding from the survey is that digital, mobile, and social channels dominate over traditional ones as sources of information. For example, 71% of the respondents rate *instant messaging* as an important source of information, while only 28% say the same of *printed newspapers*. The domination of social channels can furthermore be illustrated by the fact that digital channels such as *video sharing services* and *Q&A sites* are found to be more important as sources of information compared to both *newspapers* and *TV*. (See Figure 21 below.)

**Figure 11. Importance of media channels as sources of information. Question: ‘How important are the following channels for you as sources for information?’ (Percentage of users selecting 4 or 5 on a 1-5 scale)**

![Graph showing media channels importance](image)

2.3.2 News consumption has moved from batches to streams

Among channels for news in text form, we can see from the survey that two channels distributing news in ‘streams’ – news sites and news apps – are seen as more important than digital as well as printed newspapers, through which news is delivered in a traditional ‘batch’ form. This is in line with international news consumption trends. Channels with a ‘stream’ style dominate among social media too, where instant messaging is used more frequently than any other channel (used several times per day by 74% of respondents), followed by micro-blogging (used several times per day by 38% of respondents).
2.3.3 Mobile phones are used for everything but calling

The survey results underline the importance, discussed in the previous chapter, of smartphones. For example, 55% of respondents prefer to plan and book trips using a smartphone – something which can be compared to only 5.6% preferring to speak with a person when making a booking. During trips, 62% of respondents use their smartphone for finding attractions. A majority also use their smartphone while travelling for chatting, taking photos, finding restaurants, and making payments. However, only 13% of the respondents use their smartphone for making local calls at the destination.

2.3.4 A separate Chinese media landscape

The Chinese media landscape is largely separated and distinct from that outside China. This applies to both news media and social media. It also applies to channels used for getting travel information as well as for planning and booking trips. In all these areas, specific Chinese channels are preferred over corresponding international channels. This is clearly seen when survey respondents list their main online sources of travel information: all of the 20 most frequently mentioned channels are Chinese. (See Section 2.4.3 below.) A lesson from this for European destinations and travel companies is that they need to learn how to build a presence in the Chinese media landscape.

2.3.5 Three media consumption styles

Not all media consumers are alike. As noted above, there is a general trend away from both offline media and ‘batch’ style online media. However, there is still a segment among media consumers within which traditional channels and formats are preferred. Using a statistical technique known as multidimensional scaling to analyse the survey responses, channels have been clustered based on how frequently they are rated as important sources for information by the same respondents. This clustering reveals that, apart from the segment holding on to traditional formats, two different clusters of new online formats tend to appeal to different individual media consumers. All in all, three different media consumption styles can be identified through the analysis:

- A traditional style, with a preference for (printed and digital) newspapers and magazines, radio, and TV.
- A mainstream online style. This is where the ‘news in streams’ trend can be seen most clearly, in a preference for news apps, news sites, and instant messaging.
- A community style prevalent among the more tech-savvy youth, with a preference for Q&A platforms, social community sites, and video sharing.

When looking at respondents displaying the different styles, we can see that respondents with a traditional media consumption style are typically male, while respondents with the other two styles are more often female. The differences in media consumption styles are to some extent age-related, and respondents born in the 1990s are more likely than those who are older to have a community style media consumption. A possible explanation for these differences could be that women are generally heavier social media users than men, and that the youngest segment who has grown up with the new channels are more likely to embrace them. As will be seen in the following sections, differences in travel planning and booking behaviour can also be seen between respondents with different media consumption styles. Table 2 below provides an overview of media and travel preferences of travellers with the three media consumption styles, as well as their behaviour in the pre-travel phase and how they can be reached.
Table 2. Overview of the preferences and behaviours of travellers with the three media consumption styles

<table>
<thead>
<tr>
<th>Media style</th>
<th>Traditional</th>
<th>Mainstream online</th>
<th>Community</th>
</tr>
</thead>
<tbody>
<tr>
<td>Travel style</td>
<td>Traditionalists looking for historic attractions and China-adapted hotels</td>
<td>Seeking beautiful scenery with good value for money</td>
<td>Connected explorers travelling in comfort</td>
</tr>
</tbody>
</table>
| Preferred media channels | • Printed and digital newspapers and magazines  
• TV and radio | • News apps  
• News sites  
• Instant messaging apps | • Q&A platforms  
• Social community sites  
• Video sharing platforms |
| Travel preferences and behaviour | • Look for destinations with rich **culture** and **history**  
• Avoid destinations that are not **child-friendly**  
• Say good trips are characterised by either **stillness** or **adventure**  
• Prioritise **Chinese-speaking** staff, **Chinese payment** methods, and good **breakfast** when choosing accommodation  
• Spend **2-3 hours** searching for information ahead of trips  
• Purchase more travel products directly **at the destination**  
• Book through **offline agencies** | • Look for destinations with good **weather**, beautiful **scenery**, good **food**, and good **beaches**  
• Avoid destinations with high risk of **crime**, or where locals are **unfriendly** to Chinese tourists  
• Say good trips are characterised by **fresh air** and **beautiful environments**  
• Prioritise **value for money**, **cleanliness**, and **safety** when choosing accommodation  
• Spend **2-3 hours** searching for information ahead of trips  
• Book through **OTAs** | • Look for destinations with a **fascinating local lifestyle** and **convenient transport**  
• Avoid destinations with too many **tourists**  
• Say good trips have let them **escape from everyday life**  
• Prioritise **Wi-Fi** and **comfortable beds** when choosing accommodation  
• Spend >8h searching for information ahead of trips  
• Pre-book **portable Wi-Fi** and tickets to **concerts, events**  
• Book through **channels with social elements**, or through **OTAs** and **official homepages** |
| How to reach them? | • Put inspiring ads in traditional media channels: **TV**, **radio**, **newspapers**  
• Advertise or get covered by **travel magazines**  
• Get featured in **guidebooks**  
• Make sure it is easy to contact you directly by phone, email, and social channels – and that questions quickly get replies | • Ensure you have a presence at the leading **OTAs** such as Ctrip  
• Advertise on the main **search engine** Baidu, so potential travellers see your product or destination when doing travel-related searches  
• **Encourage visitors to share posts and photos** in social media, so that potential travellers get aware of you through their online friends  
• Advertise in mobile **news apps** | • Get visible in online travel communities and on **travel planning platforms**, either through advertising or by encouraging travellers to include your product or destination in suggested itineraries  
• Encourage Chinese visitors to share **videos** and other posts from your destination online  
• Advertise on sites/apps of **online forums**  
• Be visible through the leading **OTAs**, and on the search engine Baidu |
| Connection to booking styles | • Strongly connected to **traditional agency bookers**, who also prefer traditional channels | • Somewhat connected to **OTA bookers**, with whom they share ‘mainstream preferences’ | • Overlapping with **social bookers** (but the social booking channels are still small) |
| Share having a European destination at the top of their mind* | 31% | 20% | 35% |

* The figures for the ‘shares having a European destination at the top of their mind’ are the shares of respondents within each segment giving the name of a destination in Europe in response to the open survey question ‘Is/are there any travel destination(s) outside China that you have recently become
interested in visiting?"

2.4 Differences in travel attitudes and behaviour between travellers

When comparing the survey responses of respondents falling into the different media consumption styles, as described above, several tendencies can be identified. Most travellers – and especially those with a traditional or community style media consumption – say they are always looking for travel inspiration, no matter whether they are about to go on a trip or not. When choosing a destination, the typical traveller is looking for somewhere beautiful – but differences can be seen between travellers with different media consumption styles. Three Chinese OTAs (Ctrip, Qunar, and Tuniu) dominate as sources of travel information together with one Chinese search provider (Baidu), something suggesting that providers of travel products should make sure that they are visible through these.

Although all surveyed travellers have an interest in travelling to Europe, this interest varies between travellers with different media consumption styles. Based on an open survey question about what destinations respondents have recently become interested in travelling to, Figure 22 shows the shares of each segment who mention destinations in Europe, other long-haul destinations, and short-haul destinations. The interest in European destinations turns out to be biggest among respondents with a community style media consumption, who are the ones who most want to explore different local lifestyles. The interest is smallest among respondents with a mainstream online style media consumption, likely since their preferences (for things such as nice weather and good beaches) tend to be of the kind that can easily be satisfied on destinations geographically closer to China.

*Figure 12. Share of travellers with different media consumption styles who mention European destinations, other long-haul destinations, and short-haul destinations in response to the open question ‘Is/are there any travel destination(s) outside China that you have recently become interested in visiting?’*
2.4.1 Inspiration and planning styles

The typical respondent from the survey settles on a destination one month ahead of departure, and chooses a destination before choosing activities. The approach to looking for inspiration and information varies between media consumption styles.

Most respondents (55%) claim to be always looking for travel inspiration, whereas the other 45% only start to look for travel information after having decided to go on a trip. The habit of always looking for travel inspiration is especially common among respondents with a traditional media consumption style. It also dominates, albeit to a lesser extent, among those with a community style. Respondents with a mainstream online media consumption style, on the other hand, tend to start looking for travel information only after having decided to go on a trip.

In terms of the sources used for inspiration or trip planning, travellers who went to Europe for their most recent outbound trip to a higher degree than others got information from family or friends. A possible explanation for this is that trusted sources are especially important for travellers going to far-away destinations perceived as being very different from home. Travel brochures and digital travel guidebook are also used more by travellers going to Europe. OTAs and online search engines – though still the most important information sources – were used to a lesser extent by travellers visiting Europe than by those going to short-haul destinations. These differences are in line with findings from the interviews conducted as part of this study (see chapter 3), showing that travellers do more extensive research ahead of trips to Europe – while more often doing only basic research through OTAs and Baidu for trips to neighbouring countries, which are commonly perceived as being similar to home.
When deciding where to go and what to do on a trip, only 13% let the activity they want to do inform their choice of destination – 87% make a decision about destination first, and choose activities based on what is available at that destination.

The typical planning horizon is one month – 32% settle on a destination this long in advance of an outbound trip. 3% plan more than a year ahead, while 7% plan less than one week ahead.
2.4.2 Destinations resonate differently across media consumption styles

When asked about what factors are most likely to make them choose to travel to a destination, ‘beautiful scenery’ is by far selected by most respondents (67%). ‘Beautiful environment’ is similarly the description that most respondents (43%) say has characterised the outbound trip that they have been most satisfied with. ‘Risk of terrorism’ is the factor which would make most avoid a destination (82%).

Some differences can be noted between respondents with different media consumption styles (see Section 2.3.5):

● Those with a traditional style tend to care more about whether a potential destination has a ‘rich culture and history’ and ‘good shopping’. They more often say their best trip included ‘meeting new people’ and was characterised by ‘stillness’, although a more adventurous subgroup say their best trip was characterised by ‘adventure’ and ‘adrenaline’. Factors which tend to make respondents with a traditional media consumption style avoid a destination include ‘not being able to use Chinese payment methods’ and the destination ‘not being child-friendly’.

● ‘Good beaches’, ‘beautiful scenery’, ‘good food’, and ‘warm and sunny weather’ are more important for those with a mainstream online style. Their best trip was more often than for others characterised by ‘beautiful environment’, ‘fresh air’, ‘blue sky’, and ‘relaxation’. More than others, they tend to stay away from destinations where there is a ‘risk of terrorism’, dangers such as ‘theft and violence’, or local people who are said to be ‘unfriendly to Chinese tourists’.

● Respondents with a community style tend to give more weight to a ‘fascinating local lifestyle’ and ‘good accommodation’. Their best trips tend to have been characterised by ‘escape from everyday life’. They tend to avoid destinations where there are ‘too many tourists’ or that are ‘too expensive’. The latter can perhaps be explained by respondents within this segment typically being younger than others.
Differences in destination preferences between travellers with different styles for booking can be found in Section 2.5.2.

### 2.4.3 A few domestic giants dominate as online sources of travel information

When asked in an open question which website they generally get travel information from, 3 of 4 respondents identified one of three leading OTAs – Ctrip (35%), Tuniu (16%), or Qunar (9%) – or China’s main online search engine Baidu (16%). Table 3 shows the 20 most frequently mentioned online sources. Not one of them is non-Chinese, something which highlights the fact that the Chinese online media landscape is to a great extent separate from that in other countries.
Table 3. Main online sources of travel information. Open question: ‘From what website do you generally get travel information? Please fill in a specific website’s name.’ (Share of respondents mentioning specific websites.)

<table>
<thead>
<tr>
<th>Channel</th>
<th>% of resp.</th>
<th>Channel</th>
<th>% of resp.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ctrip</td>
<td>34.6%</td>
<td>Lümama</td>
<td>1.3%</td>
</tr>
<tr>
<td>Tuniu</td>
<td>16.1%</td>
<td>Dianping</td>
<td>0.6%</td>
</tr>
<tr>
<td>Baidu</td>
<td>15.8%</td>
<td>Zhihu</td>
<td>0.6%</td>
</tr>
<tr>
<td>Qunar</td>
<td>9.3%</td>
<td>Taobao</td>
<td>0.5%</td>
</tr>
<tr>
<td>Mafengwo</td>
<td>4.4%</td>
<td>WeChat</td>
<td>0.4%</td>
</tr>
<tr>
<td>Fliggy</td>
<td>2.8%</td>
<td>China Travel Web</td>
<td>0.4%</td>
</tr>
<tr>
<td>Meituan</td>
<td>1.9%</td>
<td>Tongcheng (同城)</td>
<td>0.4%</td>
</tr>
<tr>
<td>Weibo</td>
<td>1.8%</td>
<td>Maotuying</td>
<td>0.2%</td>
</tr>
<tr>
<td>Tongcheng (同程)</td>
<td>1.6%</td>
<td>eLong</td>
<td>0.2%</td>
</tr>
<tr>
<td>Qiongyou</td>
<td>1.6%</td>
<td>Douban</td>
<td>0.2%</td>
</tr>
</tbody>
</table>

The above is in line with the types of sources respondents used for getting inspiration or planning their most recent trip, for which ‘online search engines’ (41%) and ‘websites of OTAs’ (40%) are most frequently selected. The figures can be compared to the shares of respondents selecting ‘recommendations from friends and family’ (26%), or digital (15%) and printed (8%) guidebooks.

When looking at how the main sources of travel information (ranked in table 3) differ between respondents with different media consumption styles, the following tendencies can be seen:

- Respondents with a traditional media consumption style tend to also use traditional channels for travel inspiration and planning: guidebooks (paper and digital), offline travel agencies, official websites, TV/radio, as well as direct contact with hotels and other product providers.

- Online search engines and OTAs – the two channels that are most important for the average respondent – are even more important for respondents with a mainstream online media consumption style. Family and friends are also especially important for them than for the other segments.

- Social and community channels are used most for inspiration and planning by respondents with a community media consumption style. These include online forums and social media channels such as Weibo, as well as travel community platforms such as Qiongyou. Group buying sites such as Meituan are also used for inspiration and planning more than within other segments.
2.5 Planning and booking

Travellers typically use just a few hours to search for travel information, and a smartphone is the preferred device for booking. Among booking channels, Ctrip and official homepages dominate for every type of travel product. Based on which booking channels travellers use, four booking styles are presented in Section 2.5.2: Traditional agency bookers, OTA bookers, direct bookers, and social bookers.
2.5.1 Ctrip and official homepages dominate among booking channels

Presented with five different travel product categories, and with lists of channels which can be used for booking, respondents were asked which channels they used for booking products within each category for their most recent outbound trip. The top two channels for every category turned out to be Ctrip (number one for accommodation, air tickets, and entry tickets) and official homepages (number one for rental cars and restaurants). This underscores Ctrip’s dominance. The second most used booking channel across categories – the competing OTA Qunar – is used by only about half as many respondents as Ctrip. The five most widely used channels for each product category can be seen in Table 4.

Table 4. Percentage of respondents who use specific channels for booking specific travel products. Questions: ‘Through which channels did you book…?’ (Share of respondents.)

<table>
<thead>
<tr>
<th>Travel products</th>
<th>Top booking channels</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Accommodation</strong></td>
<td>Ctrip</td>
<td>28.4%</td>
</tr>
<tr>
<td></td>
<td>Home page of hotel</td>
<td>26.5%</td>
</tr>
<tr>
<td></td>
<td>Call hotel</td>
<td>15.9%</td>
</tr>
<tr>
<td></td>
<td>Qunar</td>
<td>15.5%</td>
</tr>
<tr>
<td></td>
<td>Offline travel agency (visiting its physical office)</td>
<td>11.7%</td>
</tr>
<tr>
<td><strong>Air tickets</strong></td>
<td>Ctrip</td>
<td>36.8%</td>
</tr>
<tr>
<td></td>
<td>Home page of airline</td>
<td>34.3%</td>
</tr>
<tr>
<td></td>
<td>Qunar</td>
<td>18.7%</td>
</tr>
<tr>
<td></td>
<td>Offline travel agency (visiting its physical office)</td>
<td>14.5%</td>
</tr>
<tr>
<td></td>
<td>Tuniu</td>
<td>13.8%</td>
</tr>
<tr>
<td><strong>Entry tickets</strong></td>
<td>Ctrip</td>
<td>53.2%</td>
</tr>
<tr>
<td></td>
<td>Home page of attraction or events</td>
<td>45.7%</td>
</tr>
<tr>
<td></td>
<td>Qunar</td>
<td>29.3%</td>
</tr>
<tr>
<td></td>
<td>Tuniu</td>
<td>23.5%</td>
</tr>
<tr>
<td></td>
<td>Meituan/Dianping</td>
<td>22.0%</td>
</tr>
<tr>
<td><strong>Rental car</strong></td>
<td>Home page car rental company</td>
<td>44.3%</td>
</tr>
<tr>
<td></td>
<td>Ctrip</td>
<td>40.2%</td>
</tr>
<tr>
<td></td>
<td>Qunar</td>
<td>24.8%</td>
</tr>
<tr>
<td></td>
<td>Offline travel agency (visiting its physical office)</td>
<td>21.4%</td>
</tr>
<tr>
<td></td>
<td>Tuniu</td>
<td>20.4%</td>
</tr>
<tr>
<td><strong>Restaurants</strong></td>
<td>Home page of restaurant</td>
<td>37.0%</td>
</tr>
<tr>
<td></td>
<td>Ctrip</td>
<td>35.2%</td>
</tr>
<tr>
<td></td>
<td>Call restaurant</td>
<td>31.7%</td>
</tr>
<tr>
<td></td>
<td>Meituan/Dianping</td>
<td>30.3%</td>
</tr>
<tr>
<td></td>
<td>Offline travel agency (visiting its physical office)</td>
<td>18.2%</td>
</tr>
</tbody>
</table>
2.5.2 Travel booking styles

In the same way that we can see different styles in media consumption (see Section 2.3.5), this can also be done based on which channels are preferred for booking travel products. Again using multidimensional scaling (see Section 2.3.5), four consumer segments with different booking styles can be identified:

- **Direct bookers.** Travellers booking directly with product providers. (Booking through the homepages of hotels, airlines, attractions, restaurants, and car rental companies, as well as calling hotels, airlines, or restaurants.) They are overrepresented within the lowest income group, and are the most likely to travel by themselves. They are most likely to choose destinations with ‘beautiful scenery’ and worry about ‘theft and violence’. Selling to this group requires visibility in the key channels that prospective travellers use for research, and an official website that makes booking easy.

- **OTA bookers.** Travellers booking through OTAs (including Ctrip, Elong, Fliggy(Alitrip)/Taobao, Lümama, Tongcheng Travel, Qunar, and Tuniu). They are typically male, more likely then others to claim that their level of English is below average. They travel with their partners more often than others, but are less likely to travel with their parents or with children. They are more likely than others to choose destinations with ‘good beaches’ and ‘good food’ and constitute a price-sensitive and convenience-seeking group. Selling to this group involves establishing a presence on the largest OTA platforms.

- **Social bookers.** Travellers booking through channels with social elements (including Mafengwo, Meituan and Dianping, Qiongyou, TripAdvisor, and WeChat official accounts). They are typically female, and are overrepresented in the highest income group. They are the most likely to be travelling with friends and choose destinations that receive ‘positive reviews online’. Selling to this group requires a presence and visibility in key social channels.

- **Traditional agency bookers.** Travellers booking through traditional travel agencies (visiting the physical office of an offline travel agencies, as well as booking through the website or app of a traditional travel agency such as CYTS or U-tour). They are likely to be travelling with children and are more likely than others to reconsider a destination if it is not child-friendly. They are more likely than others to prefer destinations that are ‘not too crowded’. Selling to this group requires working with travel agencies.

Further recommendation for how to reach consumers through different kinds of channels can be found in chapter 4.

Similar to the media consumption styles from Section 2.3.5, respondents with different booking styles also tend to behave and think in different ways about travelling. The following can be seen about destination preferences:

- **OTA bookers** are more likely than others to choose destinations with ‘good beaches’ or ‘good food’. They are slightly more likely to reconsider a destination because it is ‘too expensive’ or because of ‘inconvenient transportation’.

- Travellers booking directly with providers are the most likely to choose destinations with ‘beautiful scenery’. They are slightly more likely to reconsider a destination because of dangers such as ‘theft and violence’.

- **Social bookers** tend to choose destinations that receive ‘positive reviews online’. They are slightly more likely to reconsider a destination because of ‘risk of terrorism’ or ‘health risks’.

- **Traditional agency bookers** are slightly more likely than others to prefer destinations that are ‘not too crowded’. They are slightly more likely than others to reconsider a destination because it is not child-friendly. (This is the segment most commonly travelling with children.) However, they tend to find the factors which generally make travellers stay away – ‘terrorism’, ‘theft and violence’, ‘health risks’, and people being ‘unfriendly to Chinese’ – to be less important than others do.
There are also differences in media behaviour between respondents with different booking styles. For example, we can see that social bookers tend to be heavier smartphone users while travelling – except for reading news and writing reviews, which is more common among OTA bookers. Travellers using traditional travel agencies are less likely than others to be using a smartphone during trips. (See Figure 27.)

Figure 17. Smartphone usage during trips. Question: ‘During [your last trip outside China], what things did you use a smartphone for?’ (Share of respondents.)
2.5.3 Trips are typically planned during a few hours using a smartphone

Only 19% of the respondents say they spent more than eight hours searching for online information before going on their most recent outbound trip, while as many as 39% spent 2-3 hours and 15% only spent about 1 hour. The figures remain similar when only looking at respondents who say they were the one who did most of the planning for the trip.

- The survey indicates that travellers in the community style media segment use more time than the others to search for information online ahead of a trip, with the typical respondent saying he/she used more than eight hours ahead of the most recent trip.
- Travellers in the traditional style segment and the mainstream online style segment both typically use only 2-3 hours to search for online information. Comparing these two segments, we can see that higher shares of travellers with a mainstream online style are overrepresented at both ends of the scale (using either very little time or a lot of time), while a higher share of those with a traditional style are found in the range 2-8 hours.

**Figure 18. Approximately how many hours did you spend searching for online information before the trip?**

![Bar chart showing the distribution of hours spent searching for online information by media consumption style.](chart)

A majority of the respondents (66%) prefer to plan and book a trip using either a smartphone (55%) or tablet (11%) – more than double as many as those preferring to use a computer (29%). This is a reminder of the strong dominance of mobile devices. Just 6% prefer speaking to a person (face to face or over the phone). The following differences between travellers with different media consumption styles can be seen:

- Smartphones are the preferred device for booking among all media consumption segments, but especially so for travellers in the community style segment.
- Travellers in the mainstream segment more often than others prefer using computers.
- Those in the traditional media segment are more likely than others to prefer booking through tablets. This can be explained by the popularity of tablets for reading digital newspapers (the preference for which is one of the indicators of the traditional media consumption style).
Between the booking segments, the differences in device preferences are the following:

- **Direct bookers** are more likely to prefer using a computer to book travel products. This might be explained by product providers’ homepages often being designed for computer screens rather than mobile devices.

- **Social bookers** are especially likely to prefer using smartphones for booking.

- **OTA bookers** are also overrepresented among those preferring to book using a smartphone, albeit to a lesser extent compared to social bookers.

### 2.5.4 Booking before and during the trip

In general, ‘flight tickets’, ‘accommodation’, and ‘travel packages’ are generally booked *before* the trip, while ‘restaurants’, ‘entry tickets’, and ‘rental cars’ are booked *during* the trip. This is not surprising, but more nuances can be seen by looking at differences between travellers with different media consumption and booking styles.
The following differences can be seen between travellers in the different media consumption segments:

- Travellers in the *traditional* media segment tend to book less travel products before departure, and more often than the other segments book products such as rental cars and accommodation after arriving to the destination. Restaurants is an exception, with restaurant reservations more often being made before departure in this segment.

- *Community style* media consumers in the survey pre-book portable Wi-Fi considerably more often than others, and they are also more likely to buy tickets to concerts, events, etc. ahead of trips.

- Respondents with a *mainstream online media style* do not stand out much when it comes to which products are booked before or after departure, but they book rental cars before departure slightly more often than others, and slightly more often purchase entry tickets and activities/excursions after arriving to the destination.

Key differences between travellers with different media consumption styles can be seen in Figure 31 below.
Looking at the booking segments, social bookers tend to book ‘activities’ before departure. OTA bookers are the most likely to book ‘entry tickets’ before the trip. Direct bookers are, perhaps not surprisingly, those who are most likely to wait with booking accommodation until they have arrived at their destination.

2.5.5 Accommodation

The factors that on average are most important for travellers when choosing accommodation are that it has ‘good value for money’ (51%) and a ‘good location’ (37%), together with the accommodation being ‘clean’ (34%) and ‘safe’ (32%). There are, however, differences between travellers with different media consumption styles and different booking styles.

Comparing travellers with different booking styles, we can see that traditional agency bookers find ‘Chinese-speaking staff’ more important than others do. OTA bookers are the most likely to choose accommodation with ‘good breakfast’ or where ‘Chinese payment methods’ are accepted.

A comparison of travellers with different media consumption styles reveals the following:

- Those with a traditional style tend to find ‘good breakfast’, ‘Chinese payment methods’, and ‘Chinese-speaking staff’ more important than others.

- The attitude of those with a mainstream online style is in line with that of the average respondent — they find ‘good value for money’, ‘cleanliness’, and ‘safety’ to be even more important than others do.

  Respondents with a community style, on the other hand, tend to show preference for a ‘comfortable bed’ and ‘Wi-Fi’.

Figure 22. Accommodation preferences of travellers with different media consumption styles
2.5.6 Connections between media consumption styles and booking styles

There is a strong connection between the *traditional media style* and the *traditional agency bookers*. These may therefore be treated as one and the same market segment, consisting of travellers and media consumers who are holding on to the traditional ways of doing things: reading the news one newspaper at a time, planning trips using guidebooks, and making bookings through traditional agencies to a larger extent than other travellers. Their travel priorities can also be interpreted as traditional, with a preference for rich culture and history (a classic theme of Chinese tours, not least to Europe), shopping, and hotels adapted to Chinese travellers.

Travellers with a *community media style* more often than others book through channels with social elements such as Qiongyou or Dianping, revealing an overlap with the *social bookers*. Most travellers with a community media style can nonetheless be found among those who book through dominating channels such as OTAs and official homepages, however, since the social booking channels are so far very small for most travel products. Booking restaurants is an area where social channels in the form of Meituan and Dianping do dominate. The community style media consumers to some extent show opposite behaviours in comparison with the traditional segment: with a focus on experiences, they want to immerse themselves in a fascinating local lifestyle while also staying connected with friends back home through their smartphones, in contrast to the traditional ones who care less about lifestyles and are also less connected.

The tendency among travellers with a *mainstream online media style* to book most travel products through the leading OTAs suggests a connection to the *OTA bookers*. Both show behaviours and preferences in line with what can be considered mainstream, including a preference for destinations with good food and good beaches.
Figure 23. Top booking channels for different travel products, and shares within each media consumption segment using them

- **Air tickets**
  - Ctrip
  - Home page of airline
  - Qunar
  - Offline travel agency (visiting its physical office)

- **Accommodation**
  - Ctrip
  - Home page of hotel
  - Call hotel
  - Qunar

- **Tickets (concert, theatre, museum, event, attraction)**
  - Ctrip
  - Home page of attraction or events
  - Qunar
  - Offline travel agency (visiting its physical office)

- **Restaurants**
  - Ctrip
  - Meituan/Dianping
  - Home page of restaurant
  - Call restaurant

- **Rental car**
  - Home page car rental company
  - Ctrip
  - Qunar
  - Offline travel agency (visiting its physical office)
2.6 Shopping of consumer goods at the destination

Shopping is generally planned for beforehand, but also done spontaneously at the destination. Different booking styles are associated with different channels for shopping planning.

Planning what, or at least where, to shop during a trip is a part of the travel preparations for a clear majority (85%) of respondents. The two most common sources used for these preparations are ‘e-commerce sites’ (56%) and ‘recommendations from friends and family’ (52%). 89% of respondents also do spontaneous shopping at the destination, and virtually everyone (98%) buys products to bring back for others.

Respondents with a traditional media consumption style to a higher extent than others say they use printed media when planning the shopping they will do during the trip. They also mention online advertising, and to some extent family and friends, more often. E-commerce sites, on the other hand, are used more for shopping planning among both those with a mainstream online style and those with a community style. Recommendations from social media are most important within the community style segment.

Comparing travellers with different booking styles, we can see that social bookers are more likely than others to turn to recommendations from friends and family, and to social media when planning their shopping. Together with travellers booking directly with providers of travel products, they are also the most likely to buy souvenirs for friends and family. Traditional agency bookers are more likely than others to engage in ‘daigou’ trading – the practice of buying products overseas, with the purpose of selling them to people in China whom they don’t know personally.

Figure 24. Information channels for shopping planning. Question: ‘Which sources did you use when planning your shopping?’ (Share of respondents.)
Chapter 3

Interaction points for connecting with Chinese travellers at different stages of their customer journey

Building on the results of the previous parts of this study, this chapter seeks a detailed understanding of what marketing strategies and digital technologies can be utilised to connect with Chinese consumers under different conditions. Twenty semi-structured interviews were conducted and a focus group was held with consumers in the target group, with the purpose of mapping consumer journeys and the touch points and triggers associated with each part of these journeys. Implication for marketing strategies and the use of digital technologies follow from these insights, and are discussed under the different sections of this chapter.

3.1 The Chinese outbound traveller’s customer journey and associated touchpoints

Travel purchase decisions can be triggered at different stages of customer journeys. Models attempting to capture various stages of the tourism customer journey typically include inspiration, planning, booking, travelling, and sharing/reviewing. (See e.g. Tourism in Focus [2016]109, which also includes staying, sightseeing, technology, and likes & dislikes in the traveller’s journey.)

The interviews of 20 Chinese outbound travellers conducted in this study, however, suggest that in a Chinese context, the outbound traveller’s customer journey is less linear and features several parallel tracks. Such deviations from the classic model have implications for how to reach and connect to Chinese consumers. The subsequent sections therefore sketch the Chinese outbound traveller’s customer journey, with its associated triggers, touch points, and possible actions that can be taken by European tourism product providers.

This chapter makes no claim that the features discussed here are unique to the Chinese context. The purpose is to present a framework that enables an understanding of touchpoints and triggers of Chinese tourism purchase decisions at different stages of the tourism customer journey.

3.1.1 Illustrative case: the customer journey of a budget-constrained outbound traveller

The customer journey of one of the interviewees, a 20-year-old student in Shanghai, illustrates some of the features not present in the classic model. With enough savings and a holiday coming up four months later, he felt that the time had come to travel abroad for the first time. A friend of his was happy to come along for a five-day trip, but stayed out of most of the planning. Though destinations in Europe had been on his mind, he did not even consider them for the trip due to the strong budget restrictions. (No longer a student at the time of the interview, he has now travelled to Great Britain and is about to visit the United States.)

Instead, the decision was between different short-haul destinations. He considered Japan, but after discussions with friends, and a browsing of flights and accommodation option online, he quickly concluded that such a trip would be too expensive. Destinations in Southeast Asia that he could reach through low-cost flights were options that he could have afforded, but after another round of discussions with friends and browsing activities online, he felt that they were not interesting enough. He had long been attracted to South Korea’s vibrant pop culture, a fascination fuelled by a constant stream of TV series, pop star photos and gossip, and Korean-styled fashion and haircuts. Besides, Seoul would be a cool place to be seen on photos posted in his WeChat Moments stream.
After finding a cheap flight on the travel app Tuniu, he immediately bought tickets for himself and his friend, using his membership in Tuniu to get a discount. He felt confident enough that he would be able to find reasonably priced accommodation; the good transportation in Seoul meant that they could always settle for a place in a suburb and take the metro to the city centre. After that, he started doing research about accommodation options, first looking at AirBnB but eventually opting for a cheap hotel he found through Booking.com, close to but outside the centre of the city.

With flights and accommodation booked, he moved into the details of the trip. Having internet access throughout the trip was crucial since that would make him feel more secure while allowing him to use maps for guidance and do further travel research when needed. He thus rented mobile Wi-Fi for the destination in advance at Tuniu. He also downloaded Kakao, a Korean social app, in case he would meet new friends during the trip.

Since he did not have any specific activities or attractions in mind, he went to the top lists on Qiongyou to find out what one ought to do in Seoul. Rather than making a detailed schedule, he collected a set of recommendations from the top lists. This left plenty of room during the trip for unexpected discoveries, resulting in the two friends exploring a number of small boutiques that were not recommended online.

3.1.2 The generalised customer journey

The narrative outlined above contains several features that are not emphasised in the classic model, each with implications for touch points, triggers, and the effectiveness of different marketing approaches. Supported by the other interviews and the focus group conducted within this study, the following features can be noted:

- **Inspiration is a state, not a stage.** Rather than being the first stage in a process of planning a specific trip, our interviewees describe inspiration as a continuous and ongoing activity. Inspiration received actively and passively from a number of sources trigger more or less concrete travel ideas. These ideas are stored, though not always consciously, in what can be called an idea pool at the back of the traveller’s mind. Some of the interviewees, those with travel as a strong interest, research and concretise the ideas in the idea pool even in the absence of a clear travel prospect. When a decision to travel is triggered, the idea pool provides inputs into the active travel planning process. For many of the interviewees, inspiration informed tourism product purchases years later. For reasons that are discussed in further detail in subsequent sections, triggers and touch points in the inspiration stage are important keys for connecting with Chinese consumers.

- **Planning and booking are iterative rather than linear processes.** For the interviewees of this study, booking is not a module that follows after decisions made during a separate planning stage. Rather, they tend to keep several travel ideas alive in parallel, treating them as preliminary while concretising them to a point where they can either reject or select each one of them. This involves frequent backtracking to an earlier planning stage before everything is settled.

- **Planning is done in layers rather than in sequence.** For most of the interviewees, what can be described as the backbone of a trip emerges at an early stage of planning. This often involves deciding on the timing of specific destinations to be visited, developing a general sense of what activities and product types to include, as well as booking of flights and accommodation. When the backbone is set, the interviewees tend to move on to the next layer of planning and booking, researching specific travel products and settling the detailed components of the itinerary. This often involves careful comparison between options. Depending on the traveller’s disposition, categories such as transportation and restaurants are often researched or discovered at the destination. The interest of the traveller determines the order in which product categories are booked; foodies tend to book restaurants earlier on, for example, while those travelling with a specific activity in mind settle on the activity before making other arrangements.

- **Reaching a purchase decision is as much a process of removal as of selection.** With a large number of travel products to choose from, our interviewees describe filtering out the options, at each stage of planning, that do not fit well enough into the plan or look weaker than other options. Such reduction can be based on factors such as weather...
conditions, price, convenience factors, and security warnings. While the reduction stages provide few touch points through which consumers can be influenced, there are actions that travel product providers can take to decrease the risk of being filtered out.

- **Tailoring a trip according to one’s taste is achieved by introducing personal elements into pre-existing configurations.** None of the interviewees constructed a trip from scratch. Most relied almost entirely on tourism products that had been recommended by others, especially those that were ranked highly on online travel planning or booking platforms. Some adopted entire itineraries or combinations of tourism products that had received positive feedback. To better fit their personal tastes, most interviewees adjusted proven itineraries by introducing specific tourism products and other elements to their liking. This stage offers important touch points for tourism product providers to trigger purchase decisions.
Figure 25. The tourism consumer journey, generalised from the focus group and 20 interviews in this study.

**IN INSPIRATION**

- INSPIRATIONAL TRIGGER
  - "Wow!"
- SHARPENING THE IDEA
  - "Is it really that good?"
- IDEA POOL
  - "Maybe some day..."

**TRIGGERS**

- EXTRINSIC
  - "A holiday is coming up in October"
- INTRINSIC
  - "I need a get-away to relax"

**ACTIVE INPUTS**

- "Where do you think I should go?"

**DECISION TO TRAVEL**

**SEED STAGE**

- "Which of my travel ideas make most sense right now?"

**CONCRETISATION STAGE**

- "How many days should I stay?"
- "Are there reasonably priced flights for my dates?"
- "Which of the hotel options is the best?"
- "What tour should I join for this activity?"
- "Where is the best place to book this?"

- BUILDING A BACKBONE
  - "Should I stay in one place or travel around?"
  - "What should be the main activities during my trip?"

- DETAIL PLANNING
  - "Where should I eat?"
  - "How do I make sure I can access internet?"

- BOOKING
  - "Can I get a discount?"
3.2 Channels and touchpoints

The traveller’s customer journey includes a range of touchpoints through which product providers and destinations can reach the prospective traveller. Different channels are used by travellers at different stages of the customer journey, with implications for how best to trigger travel ideas and purchase decisions. Based on the interviews, Table 5 provides a list of channels that are important at different stages of the customer journey. The precise touchpoints in relation to these channels are discussed under the respective section below.

Table 5. Touchpoints and customer journey stages they are relevant in, based on interviews.

<table>
<thead>
<tr>
<th>Channel (Importance indicated by number of ‘+’ signs)</th>
<th>Inspiration</th>
<th>Seed stage</th>
<th>Concretisation stage</th>
<th>Detailed planning &amp; booking</th>
</tr>
</thead>
<tbody>
<tr>
<td>Friends &amp; family</td>
<td>+++</td>
<td>+++</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Online stars and influencers</td>
<td>++</td>
<td>+</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Physical shops</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Themed/niche media</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Travel magazines</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Video and other advertising in metro and taxis</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>WeChat official accounts run by travellers</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>Baidu ads and search results</td>
<td>+</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guidebooks</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>+</td>
</tr>
<tr>
<td>Online travel communities</td>
<td>++</td>
<td>++</td>
<td>+++</td>
<td>+++</td>
</tr>
<tr>
<td>Official travel industry WeChat accounts</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td></td>
</tr>
<tr>
<td>E-commerce platforms</td>
<td>+</td>
<td></td>
<td></td>
<td>+</td>
</tr>
<tr>
<td>Offline agencies</td>
<td>+</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>OTAs</td>
<td>+</td>
<td>++</td>
<td>+++</td>
<td>+++</td>
</tr>
<tr>
<td>Websites of tourism product providers</td>
<td>+</td>
<td>+</td>
<td>+</td>
<td>++</td>
</tr>
</tbody>
</table>

3.3 The inspiration phase

Some travellers constantly look for travel inspiration, others are uninterested. One dividing line between interviewees and survey respondents stands out in particular from the interviews and survey, giving rise to two types of Chinese outbound travellers with regards to receptiveness toward travel inspiration:

- **Travellers who are constantly open for travel inspiration.** While not necessarily searching for them actively, they tend to keep their eyes and minds open to new travel ideas, even if they have no trip planned. According to the survey results, this group makes up 55% of outbound travellers. For some, actively looking for travel inspiration is a hobby. ‘I enjoy browsing for trip info online’, one interviewee says.

- **Travellers who think about travel only when a trip needs to be planned.** These travellers do not click to read travel stories appearing in their social media streams, and do not actively consume travel magazines and other travel related information. According to the survey, this group makes up 45% of outbound travellers. Probing deeper through the interviews in this study, it is clear that this does not mean that the inspiration phase is entirely absent for these travellers; only that they are less conscious of it. Asked how they in the first place came to be interested in the different destinations and tourism products that they were choosing between ahead of their recent trips, they mentioned...
triggers and events that had played out long before the decision to travel. This indicates that sources which were not part of any active planning were still important for inspiration.

**Half of the target group receptive during the inspiration phase.** For destinations and providers of travel products, this means that around half of potential Chinese customers are consciously receptive to travel ideas at any time, while the other half is most easily reached when they are actively planning a trip. Peak travel times are in July-August and around major holidays (especially Chinese New Year in January or February and the National Day in October). Since 63% of the survey respondents decide on a travel destination 1-3 months before departing, the months prior to the peak times constitute a window for reaching more travellers.

3.3.1 Inspiration is an incubation stage, generating ideas that feed into the planning process

**The travel decision is not the start of the customer journey.** When asked how they started to think about and plan for a specific trip, almost all interviewees said that it started with an upcoming vacation or some other external factor allowing them to travel, and also that they already had an interest in the destination or tourism product in question. When asked follow-up questions about how and when that interest came about, however, most can identify some previous moment or set of events which initially sparked this interest, often several years back in time. For one interviewee, who was a student at the time, an opportunity to go to Japan came when he was accepted for exchange studies there, which he could combine with one month’s travelling around the country. After taking some time to think, he says his interest in Japan started growing 2-3 years earlier as he watched a Japanese film with beautiful scenery. The outcome of the inspiration phase is that consumers have a new trip idea at the back of their mind, or that a new interest means they will thereafter be more dispositioned to plan a trip to the destination they have become interested in.

**Travel ideas are incubated in an idea pool.** All but two of the travellers interviewed for this study say they are keeping a range of travel ideas in the back of their head. When they decide to go on a trip, they will not start to look for information from scratch, but instead turn to their pool of ideas collected during the continuously ongoing inspiration phase. This means that someone who has been thinking about trips to California, Scandinavia, and Japan’s Hokkaido (as was the case for some of the interviewees) will be less open to suggestions of going to other places at the time he or she starts planning for an actual trip. Consequently, destinations need to connect earlier (in the inspiration phase) to attract them. While most people tend to have some trip ideas, the character of these can be anywhere on a spectrum from loose non-articulated ideas about interesting destinations or travel activities – or the kind of ‘feel’ they want the trip to have – to very concrete and specific itineraries.

**Travel spawns more travel ideas.** One interviewee told how he got inspired to go on a road-trip in the U.S. after having done several long self-driving trips around China, and how he got inspired to take his wife and children to New Zealand after having had a great trip with his mother to the country. As all destinations and providers of travel products know, making sure visitors are having a good time influences both the visitors’ own future travel choices and those of their family and friends.

3.3.2 Narrowing down the idea pool

**Travel ideas are continuously triggered, refined, concretised, and rejected.** For several of the interviewees, the interest in a destination or travel product was sparked through an inspirational photo or video in their social media feeds. For others, the interest was awakened by travel stories told by friends or family members, by articles posted on WeChat or in a travel magazine, or by a TV series set in an exotic environment. Once their interest was sparked, some of the interviewees turned to a range of online and offline sources for research, even if no opportunity to turn the ideas into reality had yet presented itself. This was typically done through the Baidu searches (often for more photos), OTA sites like Ctrip, and by asking friends who have experienced the travel product in question. One interviewee mentioned that she always tries to find the official
website of the national or regional tourism organisation, as well as of the tourism product providers. Thus, research is often used unrelated to the decision to travel in order to refine and concretise travel ideas in one’s pool of travel ideas, sometimes with the result that they are rejected and forgotten.

The interviews in this study reveal two sets of filters that are applied as travel ideas are incubated in the idea pool:

- The primary filter answering the question ‘Do I want?’. The destination featured in that inspiring video might turn out to be much less interesting following some basic research, upon which the idea is abandoned.
- The other important filter relates to the question ‘Can I?’. If the costs appear unreasonable, or if either visa procedure or transportation is too complicated, then that will make the trip idea seem unfeasible.

**Filters are individual and based on personal tastes.** Two interviewees affirmed that they get put off and immediately discard a travel idea if a destination or tourism product turns out to be popular in China, because of the risk of coming across Chinese tour groups. ‘I want places with beautiful nature, good food, clean environments, no rain – and no Chinese tour groups!’, one of them said. Another interviewee mentioned that destinations appearing to be too commercialised will make him drop the idea of going there. While preferences are individual, there are also trends among independent Chinese travellers in what is likely to catch on. One clear such trend, which has been noted elsewhere, is the appetite for immersive experiences: ‘everyone wants to be a part of local life, and have real and unique experiences’, as one interviewee put it.

### 3.3.3 Touchpoints and triggers in the inspiration phase

**WeChat: One channel, many touchpoints.** The shift from offline to online media can be clearly seen in the interviewees’ habits. One interviewee, for example, identified two main sources of travel inspiration, both with social media as channel, but with different authors: one being posts from friends on WeChat and Weibo, the other being ‘online stars’ using the same channels. He did not find printed media important for inspiration at all, and had to think for a while before realising that he actually used to read printed newspapers and magazines up until a few years ago. ‘Now that mobile phones are common, they have replaced the role of printed media’, he said. Another interviewee said that ‘WeChat groups can be super inspiring. WeChat has become a very central channel for travel info, much more important than for example travel magazines.’

**Photos: One touchpoint, many channels.** Most interviewees mentioning photos as a trigger said that inspirational travel photos tend to pop up in social media feeds, typically among WeChat moments or among other social media posts from travelling friends. One interviewee remembered inspirational photo and video as she comes across in taxis and in the metro system, and noted that she likes reading travel magazines for inspiration, partly for the photos. Other interviewees did not see printed media of any kind as a source of travel inspiration, apart from occasionally flipping through in-flight magazines, or those available in Chinese high-speed trains. Several themes emerged from the interviews and focus groups in relation to photos as a source of inspiration:

- **Photos are the most common trigger.** The single most commonly mentioned trigger, almost universally brought up by interviewees as something evoking travel inspiration, is photos.

- **Photos should convey beauty.** A common description of inspiring photos is that they are beautiful, with several interviewees specifically mentioning either ‘beautiful nature’ or ‘beautiful architecture’. *Tranquility* and *simplicity* also give the interviewees positive associations. A speculation is that the contrast to the stressed and chaotic routines of the megacities, where most of the target group lives, makes these themes powerful triggers of both the push and pull motivations for travel.

- **Authenticity and honesty are demanded.** The focus group participants agreed that wide-angle and 360 degree photos are good because they make it more difficult for the photographer to ‘cheat’ by capturing only the most beautiful part of a scenery. If there is an ugly building next to the pretty hotel, consumers want to know. One of the interviewees
said he uses Google Street view, which is only accessible using a proxy to get around the internet censorship, to get a better idea of what a place looks like in reality. Another interviewee said she likes livestreaming from destinations because that makes it more difficult to edit and enhance the footage. These preferences should be seen in the context of China’s multi-billion yuan industry for enhancing photos through instant filters, and the huge problem, pointed out by several interviewees, with fake reviews and reviewers, fake rankings, fake news, fake photos, and even fake blue skies. Relatatedly, one interviewee considers travel magazines and other offline sources more credible than online sources.

- **but real, average humans are not appreciated.** Even when explicitly asked about people in photos, for example to convey social situations, travellers’ experiences, or the vibe of a destination or tourism product, few of the interviewees showed any interest. Only when shown a photo of a beach, an interviewee commented that emptiness is a bad sign as far as beaches go. Another interviewee felt strongly that if humans should be involved, it should be in the form of celebrities.

- **Flourishing of ‘de-motivational’ and ‘anti-pretentious’ tendencies.** In the focus group with Chinese travellers, the consensus was that photos with happy people jumping, posing, and in other ways looking pretentious, as is common in promotional photos, does more harm than good to the image of a destination or brand. The view is related to a growing tendency among young Chinese to distance themselves from pretentiousness and the ideal of positivity that has permeated social media and branding. New brands have even been launched that position themselves as negative opposites of well-known brands that convey positivity – such as the brand *Sad tea*, challenging the popular *Happy tea*.

- **Colours are perceived differently by Chinese.** As reminded by one of the interviewees, studies have shown that Chinese perceive colours differently than Westerners. Most notably, red is perceived by Chinese as calming.

**Video is a format on the rise.** Several interviewees mentioned video as an attractive format for inspiring travel ideas. The tendency can also be seen in other areas. More than 5000 video producers have been signed up by Alibaba to make commercial videos for stores on Taobao, its online retail marketplace. The platform enables producers to charge stores based on the number of sales that are directly generated by a video in addition to video production costs. Many other online shopping services, including Mogujie, XiaoHongShu, Dianping, and JD.com are also investing in short video production.

**When a tourism product reaches consumers through multiple touchpoints, the effect is most powerful.** The interviews in this study suggest that from the many signals that consumers are exposed to, only some are translated into travel ideas that are concrete enough to trigger active research. One factor that appears to increase the likelihood of this happening is exposure through multiple touch points. One of the interviewees, who has an interest in tea, told the story of how she formed the idea of travelling to Uji in Japan. It started with the Japanese tea district being featured in a documentary on Chinese TV. A few days after this, she heard a friend talk about the area as tourism destination, which made her think it might be an interesting place to visit. When, a couple of weeks later, she again saw the name Uji, this time in a tea shop, it got back in her mind. This time she started thinking about it more seriously as a trip idea, which triggered her to look for Uji travel information through Baidu when she got back home. This observation is in line with research that has shown that repetition of a message from several diverse sources makes it much more likely to catch on.

**Viral logics make focused marketing effective.** One focus group participant expressed the feeling that everyone is suddenly going to New Zealand, as evinced by the many photos posted from there on WeChat. This had triggered his interest in visiting the destination too. Since the perception was not shared by the other focus group participants, the group concluded that the particular travel idea must have been especially strong within his group of friends. Indeed, the principle of multiple touchpoints having a disproportionally strong trigger effect, discussed above, means that targetting specific communities, consumer tribes, or limited geographic areas may be more effective than targetting broader groups. Doing so increases the chances of an individual to be exposed to an idea from different sources, which in turn increases the chances that the individual will itself directly or indirectly pass the idea on to others.

68
Travel ads are more likely to trigger a travel idea than an immediate purchase decision. Depending on various circumstances – including time, and how many other travel ideas an individual has – the idea will stay there for a shorter or longer period of time (until it is realised, forgotten, or removed). This means that the primary results of a travel ad or story catching a potential traveller’s attention will likely be the planting of an idea, rather than a booked travel product. Because of the limited number of paid leave days, Chinese can be expected to be even less likely than others to make spontaneous travel decisions.

Discounts reduce the time from idea trigger to purchase trigger. For one of the interviewees, who has a flexible work situation, the delay between the trigger of a travel idea and the trigger of a purchase decision is gone at an instance when she finds a heavy discount on a flight or an attractive tour package. Most of the time, however, she will be more likely to purchase discounted product if she has already had it in mind.

Examples of channels for the first inspirational triggers:

- WeChat and other social media (friends or online stars)
- Friends & family
- Film & TV
- Travel magazines
- Niche media
- Physical touchpoints with connection to a theme (e.g. shops)

3.4 Decision to go on a trip – the starting point of the active preparation process

A traveller will start planning for a trip when a combination of triggers is present, typically including both intrinsic and extrinsic ones.

Intrinsic triggers. The internal drivers can be in the form of push factors and pull factors:

- Push factors highlighted in the interviews include the urge to get a break from a stressful work situation or to get away from a big, chaotic city. One interviewee, for example, told about a troublesome situation at work as the reason of why she wanted to go on a trip, and how she started planning for it as an upcoming vacation came close. The common denominator for all push factors is that they make travellers want to leave their everyday life for some time.

- Pull factors can take the form of an interest in a place, theme, or activity, or a wish to spend time with friends or family – anything which attracts a traveller to go on a certain kind of trip. It can also, as one interviewee explains, be a wish to become a more interesting and ‘cool person’ through travelling, and get more experiences and stories to share with old and new friends. Another interviewee said he had been thinking for a long time about taking his children to Australia, where he had previously been living, to let them see the ‘different lifestyle’ there – and how this became possible as the children had an upcoming holiday.
Extrinsic triggers depend on circumstances that are less personal than the above intrinsic triggers, typically being outside of the traveller’s own control. The most common extrinsic trigger is an upcoming travel opportunity, most commonly a public holiday.

After the decision to travel, consumers turn to trusted sources and pre-existing ideas. If triggers such as an upcoming public holiday defines when a customer journey starts, the individual’s travel profile determines what it starts with. Those who are always open to travel ideas will turn to their idea pool, and select a travel option among the ideas they have previously been collecting. Those who start looking for ideas after making a travel decision might instead turn to friends and family for ideas at this stage. For one interviewee, preparations for a recent domestic trip started with a friend showing her inspiring photos from a national park ahead of an upcoming holiday, upon which they decided to travel there together. Another interviewee, who was going on an outbound trip with a group of friends, did not have any trip ideas at all, and was glad that her companions had. ‘I want you to surprise me’, she recalls telling them. Yet another interviewee mentioned having had loose ideas about trips to one out of a small number of destinations – and turned to her travel-savvy cousin to let him choose among them for her. Many travellers are in this way not open to completely new travel ideas at the point of deciding to go on a trip – especially not to ideas coming from outside the circle of family, friends, and a small number of trusted online influencers. One interviewee thinks initiatives from friends are the most important trigger for making a decision. ‘People have ideas about a lot of destinations’, he says, ‘but are waiting for someone to say, “let’s go!”’.

Trust and credibility are needed to trigger new ideas at this stage. It might be expected that someone who just made a decision to travel should be especially receptive to new travel ideas, which could be promoted by a tourism product provider. The interviews do not, however, lend any support for this assumption. The more knowledgeable appear to be choosing among travel ideas they have already picked up, while the more insecure turn to people they trust for advice. It thus appears difficult for someone from the outside to plant totally new ideas at this stage – although pre-existing ideas can be amplified. The influence of family and friends, who might be recommending destinations and products they have experienced themselves, also highlights the importance of engaging happy travellers in spreading the word.

3.5 The seed stage: exploring possible trips

As the planning stage begins, the various ideas that have been incubated in the idea pool and the recommendations from others become ‘seeds’ for further investigation and planning. The interviews indicate that such seeds can take many different forms, depending on interests, travel partners, and practical circumstances. One of the trips discussed had ‘travelling around Europe’ as a starting point, another ‘seeing Montmartre with my own eyes’. One was centred around a famous restaurant in Tokyo, while a few had gastronomic experiences in general as a point of departure. One trip started with an idea about the type of hotel to stay in, since activities were of less importance. Several other trips took an activity as a point of departure, such as skiing, diving, and watching basketball. The type of seed also determines which channels and touchpoints are most important at this stage.

Although different customer journeys research and book products in different orders, the interviews and survey allow for an outline of the approximate average booking order (see Figure 36).
Seeds can be more or less specific. A choice of destination can be made on different geographic levels. In some cases the destination one has in mind might be a city (‘Paris’), whereas in other cases it might be a country (‘France’), or even a continent (‘Europe’). The idea might even be more specific, such as visiting a specific Parisian neighbourhood one has seen photos from in one’s WeChat feed. This is to some extent related to the choice of whether to stay at one place throughout the trip or travelling around, as a trip to a larger area allows for more moving around. When asked an open question in survey about destinations they have recently become interested in visiting, 3% of respondents mention a continent or other large area (such as Western Europe), while 69% mention a country, and 28% mention a city or other low-level location (such as an island).

The level of planning effort and detail varies between travellers. Travellers surveyed in this study can be placed on a scale of how much effort they are willing to spend on planning:

- At one end of the spectrum, some travellers surveyed in this study avoid travel planning altogether by tagging along with family or friends, who are responsible for the planning (ca 15% of the surveyed travellers).
Next on the scale are those who **outsource some or most of the planning** by purchasing tour packages for components of the trip, using online services for personalised planning, or travelling together with companions who do most of the planning (ca 45% of the surveyed travellers).

A third group **adopts large parts of itineraries suggested by others**, adding a smaller number of elements themselves, and do all the booking themselves (ca 25% of the surveyed travellers).

At the other end of the spectrum are those who want to do **detailed planning themselves** and meticulously plan and search information from various source for every detail of the trip (ca 15% of the surveyed travellers).

Figure 38 shows the shares of travellers with different levels of planning effort and detail, as estimated based on the survey.

**Figure 28. Estimation of shares of travellers with different level of planning effort and detail**

An iterative process. Starting from a seed, the consumer sets out to construct a more concrete plan, layer by layer; first settling on the most important components, then adding those that are more peripheral. In some cases, insights coming up during the planning stage led the interviewees to reconsider the whole trip idea. This was, for example, because the hotels an interviewee could afford turned out not to be good enough. In a different case, it happened after the interviewee realised that the activities she wanted to do could not easily be combined. This led them to go back to examine a new travel idea. The interviewees told of researching different ideas in parallel, sometimes dismissing them almost immediately, other times settling on a concrete itinerary before deciding to switch to a different idea.

From feelings to facts. The seed stage exists to assess the feasibility of more or less vague travel ideas by starting the process of translating them into concrete plans. In doing so, the interviews show that different types of filters are applied to reduce the number of options:

- **Risk factors.** One important filter among the interviewees is related to the degree to which an idea involves **risks**. The most obvious category of risks are physical dangers at the destination, such as a risk for violence or theft. A recent wave of terrorism attacks in a number of European cities constitutes such a risk mentioned by several interviewees. ‘If I would find out about a terrorist attack at the destination, then of course I would cancel the trip’, as one interviewee says. Others mention risks of crimes such as theft, and one mentions a health concern: he once reconsidered going to a high-altitude destination in Western China due to the risk of altitude sickness. Another kind of risks has to do with limited information; the less one knows about a destination, the higher the risk that a trip will not live up to one’s expectations. A high level of knowledge – or the research needed to get that – will be especially important for far-away overseas destinations such as Europe, both because the differences from home will be bigger and because the usually more complicated travel preparations mean that stakes are higher. The distance in itself also makes long-haul trip feel different: ‘In England, I felt mentally I’m so far away from my home country’, one interviewee recalls from a previous trip. ‘Getting injured there, I might not have been able to get back to China very soon’, he adds. Something which
radically decreases the perceived distance and feeling of risk is knowing someone who has previously visited a destination, making word-of-mouth information sharing important.

**Practical factors.** Other filters are related to practical, limiting factors. The time of travel, for example, is pointed out as an important filter by some of the interviewees; perhaps it is a rainy season at a destination. One’s current personal situation can also be a limiting factor; one interviewee had long had an idea about an advanced mountain hiking trip in mind, but once the opportunity presented itself, he was just yearning for relaxation. Or, as one interviewee told us, the appetite for travelling to an area known for its high temperature might disappear during a heat wave at home. The same filters as in the inspiration phase can also apply here, such as those relating to budget and convenience. One interviewee, for instance, had given up plans for a trip to western China after finding out how complicated the transportation was to the destination she had in mind. ‘I would be exhausted, and travelling should be for relaxation’, another interviewee says about the thought of having to change transport more than two or three times in order to reach a destination. Preferences among co-travellers who are not involved in the planning also get relevant at the filtering stage. One interviewee says she went with her friends to Thailand on a trip that her friends planned, but that she demanded that the hotel must be comfortable and that there should be a beach at the destination.

3.5.1 Channels, touchpoints, and triggers in the seed stage

**Questions typically asked during the seed stage include:**
- Is the destination/activities/tourism products on offer interesting enough?
- Is the trip a good fit with my schedule, travel partners, budget, and the occasion for the trip?
- Are there any dangers and difficulties associated with the trip?

‘Anti-triggers’ play an important role in the seed stage. As discussed above, getting to the point where only one travel idea is selected out of many is a process of reduction. With several parallel ideas, much of the information in this stage serves the purpose of rejecting travel ideas. Bad weather, security and health risks, lack of convenience, time-consuming transportation, and signs of a place being too crowded are types of factors that can lead to an elimination of a travel idea. Such information is accessed through a number of channels, including Baidu search results, weather sites, and online travel communities.

Tourism product providers can attempt to avoid the ‘anti-triggers’. Most of the factors discussed above are difficult to change, even with strong coordination within the local tourism industry. For tourism product suppliers, the most concrete action point is to make sure the information and photos provided are as honest and clear as possible, avoiding gaps between expectations and the actual situation. The actual experiences of previous visitors are likely to effect prospective travellers. Additionally, the interviews show that negative sources that are high up in the list of results when searching for a trip idea on Baidu often influence the decision. Such negative publicity could be countered through appropriate search engine optimisation of official websites of destinations and product providers.
3.6 Gradual concretisation phase

3.6.1 Building a backbone for the trip

The first step is to set the frames by building a backbone for the trip. Following the seed stage, prospective travellers actively do research to build a complete itinerary around an initial travel idea. This starts with building a backbone for the trip, containing the elements that the traveller considers most crucial. Though the backbone can take many different forms, it often consists of flights and accommodation, which most of the interviewees book before moving on to plan and make arrangements for specific activities. This is a way of ‘setting the frames’ for the trip, making more detailed planning easier. Early decisions thus typically include how long to be away on the trip, whether to stay in one place for the whole trip or travel around, how long to stay at each place if travelling around, and the key things to do and see in each place.

Long-haul destinations require more detailed research. Several interviewees said they do minimal research ahead of domestic trips within China, but make sure to find as much information as they possibly can for overseas destination, which are perceived as very different. ‘I’m still in China!’ one interviewee exclaimed in response to a question of why he does less research about domestic destinations, despite the country being very diverse. Interviewees mentioned practical things such as what payment methods are accepted and where Chinese diplomatic missions are located, but also cultural differences and taboos that one should be aware of. Two interviewees say it is important to read up on the laws of the countries they will visit, since they are worried of otherwise unconsciously doing something illegal. For trips to neighbouring countries such as Japan, South Korea, or countries in Southeast Asia, more limited research is done, as these destinations are perceived as both similar to China and well-adapted to Chinese tourists. One interviewee said there is also one reason for doing less research when going to developed countries, for example in Europe, compared to when going to Southeast Asia: mobile networks and internet connections are better, meaning one can rely on these for doing additional research during trips.

Channels that provide concrete information preferred. The research during this stage is done using Baidu, OTAs such as Ctrip (attractive because it is comprehensive and contains detailed information), travel community sites such as Qiongyou (attractive because it shows what other travellers recommend and top lists of attractions and activities), official destination websites, and guidebooks.

3.6.2 Adding more layers of detail to the plan

Special interest travellers use a wider range of channels. Most of the interviewees, for example, do make research about what they can shop at the destination prior to the trip. A popular channel for shopping-related research is Xiaohongshu. Primarily a social media style e-commerce platform, Xiaohongshu also has a travel section containing shopping recommendations for various destinations as well as information about attractions there. One interviewee, for whom shopping is the main reason to go travelling, says she did almost all of the research before her most recent overseas trip through Xiaohongshu. The channel is attractive because of its social curation, meaning that some interviewees consider it a more credible source.

Proven activity combinations are adopted as a starting point for planning. Just like when choosing among trip ideas, few travellers begin from scratch when starting to plan. Instead, there are established conceptions of what one should do at a specific destination. These are especially strong for well-known destinations, and can be described as more or less fixed ‘configurations’. As an example, one interviewee told that ‘everybody knows that in Paris everyone visits the Louvre and go shopping’. Another interviewee said she always starts planning by looking the top list of attractions and activities on travel site Qiongyou. These ready-made mental configurations include not only attractions that one should visit, but also how long one should stay at a certain spot, what one should try eating there, and which other places a destination should be combined with, in many cases what should be shopped at the destination, and in some cases which accommodation one should choose.

Uniqueness is achieved through modification of established configurations. In order to create a trip suits their own tastes,
rather than do exactly what everyone else is doing, the interviewees tend to introduce new components into well-known itineraries. They do most of the things that top the top list for a given destination on their favourite online travel platform, but they also look for experiences that are not widely known, such as small design shops or a local cultural event.

**Easier to sell something that fits into an existing configuration.** The configurations that dominate in Chinese travellers’ minds are not always the same as European travellers, or European travel providers, would think. As a provider of travel products, it is therefore worth studying what tends to be included in trips to the area in question. It is easier to attach one’s offering into an existing configuration than to try to create an entirely new configuration.

**Marketing can utilise unexpected associations.** Due to the long-haul nature of Chinese travellers’ trips to Europe, places that locals may think are far away can still be associated with a destination. One interviewee, for example, said he would like to see Provence if he would make a trip to Paris. Similarly, the emotional associations Chinese travellers have to specific destinations – is it thought of as a romantic place, for example? – can be used to connect to these associations when marketing travel products. ‘Paris is super romantic and beautiful’, one interviewee summarises his idea of the French capital.

### 3.6.3 Channels, touchpoints, and triggers in the concretisation stage

**Questions typically asked at the concretisation stage include:**

- How many days should I stay?
- Are there reasonably priced flights for my dates?
- Are there good-enough hotels for reasonable prices?
- What other places should I visit?
- What should be the main activities during my trip?

**Key channels and touchpoints include:**

- Top lists of attractions and activities on travel communities and recommendation sites, such as Qiongyou, are used to find existing combinations of products and activities.
- Flight and hotel comparisons through OTAs, such as Ctrip, are performed to make sure good-enough and reasonably-priced options are available for the relevant dates.
- Baidu searches, photo browsing, and reading of travel accounts in social media are media behaviours that help prospective travellers identify broad themes as well as interesting tourism products.
- Official websites of national and regional tourism organisations are visited to get an overview of recommended attractions and activities.
- Guidebooks are consulted for expert advice on key components of the trip.
- Special interest websites are used by travellers interested in specific topics. Xiaohongshu, for example, is used by travellers interested in shopping to get a feel for the products and shopping places at the destination.

### 3.7 Detailed planning and booking

**The booking stage tends to be intertwined with the planning stage.** Travel products are usually booked one at a time, after which the planning stage is revisited to configure more parts of the trip. Most interviewees said they have booked flight
tickets first for their outbound trips, before starting to plan other trip aspects. Local Chinese booking channels – especially the major OTAs – have a big dominance over international competitors (see also the discussion on this in Section 2.3). Several interviewees describe the domestic OTAs (especially Ctrip) as very convenient, and not only for booking but also for the whole research and planning process. The integrated nature of these OTAs, which include a lot of travel information, means that many travellers visit their platforms at earlier stages of the consumer journey – and it then becomes very easy for the traveller to also do the booking there.

There are exceptions from the preference for Chinese booking platforms: two interviewees said they prefer using Booking.com, one of them saying that this is a way to increase the chance of getting away from Chinese crowds. Another interviewee mentions having used Priceline for a trip to the U.S., and three interviewees say they like booking rooms through Airbnb when going abroad. As seen in the survey, there is also a segment of travellers still preferring to use offline travel agencies.

Most Chinese outbound travellers will settle on both flight and accommodation before departure, and several interviewees also said they booked local transportation such as taxi from the airport in advance. Booking flight and accommodation in advance was something all but one of the interviewees did when going overseas, although several of them express they book nothing but flight or train tickets when going on domestic trips.

This difference in behaviour can be attributed partly to a bigger need to plan for reducing risks when travelling far, partly to detailed plans in many cases being required for getting a visa. An interviewee who had travelled to Hawaii explicitly said that she booked everything in advance in order to feel secure when being far away from home. Two interviewees mentioned that they always book accommodation for outbound trips more than a month before departure, and that the reason for this is that they want to have more choices to choose between. When asked if they do the same when travelling domestically, however, they admitted that they do not, indicating that their real reason for planning ahead for outbound trips is more likely to be avoiding risks than getting more choices.

3.7.1 Channels, touchpoints and triggers in the detailed planning and booking stage

Questions asked during the detailed planning and booking stage include:
- Which of the hotel options is the best?
- How do I arrange different activities timewise?
- How do I get around between activities?
- What tour should I join for an activity I want to experience?
- How do I make sure I can access internet?
- Where should I eat?
- Can I get discounts or use special channels for a better price on the tourism products I am interested in?

Channels and touchpoints during the detailed planning and booking stage include:
- In the detailed research phase, many of the sources used in the concretisation phase (discussed above) are used, but in order to answer a set of more detailed questions.
- OTAs, meta search providers, and peer-to-peer rental platforms (such as Airbnb) are used to compare the details of specific tourism products. Rating, location, price, and atmosphere conveyed through photos are primary selection criteria. Among the remaining option, the interviewees in this study look at the detailed list of facilities and read individual reviews, paying special attention to the negative ones.
Product providers’ websites and offline travel agencies. Though the survey of this study has shown that travellers preferring to plan and book through product providers’ websites are in a minority in most product categories, they are by no means a small group. Keeping one’s website up-to-date and adapted to the preferences of Chinese internet users – having a Chinese language version, speedy loading from China, and a mobile-friendly format – are key for tourism product providers.

E-commerce platforms, such as Xiaohongshu, are used to research the specific products and shopping places that should be purchased during the trip.

### 3.8 The travel phase

**Many booking and purchase decisions are triggered after the traveller has arrived at the destination.** Decisions that are typically left for travel stage include what restaurants to eat in, shops to visit spontaneously, and attractions to visit some afternoon one hasn’t planned anything for. For some interviewees, leaving as much as possible open is important for making a trip feel relaxed, which means they will do a larger share of decisions while travelling. This was the case for the interviewee who travelled to New Zealand with his family, who only booked the first two nights’ accommodation before departing, and solved the rest locally. For the European Schengen area, however, being able to show a detailed itinerary is a requirement for getting a visa, which leaves less room for spontaneity.

**Chinese touchpoints important even at the destination.** One interviewee said he mainly makes plans along the way using Qiongyou, while others mention making bookings through Ctrip on their phones when they are at the destination. This means that Chinese travel-related online channels remain a touchpoint for reaching travellers also after they have arrived at the destination. None of the interviewees mentioned using Chinese restaurant recommendation apps such as Dianping during long-haul trip, but if more overseas restaurants would market themselves through these channels it is likely they might become important touchpoints. One interviewee said he uses TripAdvisor for local recommendations during trips.

**Still some room for impulsive purchase decisions.** While some planning is made at the destination, there are also decisions which are made spontaneously, by impulse. Local marketing, such as flyers at a hotel, targeting Chinese travellers who already are at the destination therefore remain relevant.

**Media habits during the trip vary.** Apart from using mobile apps for trip planning, media habits during trips differ widely between travellers. One 20-year-old interviewee pre-booked portable Wi-Fi for a trip he did to South Korea, to be totally sure that he and his accompanying friend would be able to access Chinese social media at all times. ‘It’s really necessary for us’, he says, ‘since we need it for sharing pictures’. For him, being able to share cool travel photos and stories with friends back home is one of the basic reasons for travelling. Another interviewee, who is in his 40s, has a very different approach to online media: ‘I have no time for my smartphone when travelling’, he says. ‘The idea of travelling is to relax.’ He admits sometimes using his phone to book accommodation through Airbnb or use Google’s and Baidu’s navigation apps, but that is it. Such differences can in part be explained by different lifestyles being common in different age groups. For product providers wishing to become visible through social sharing, conversion rates might be higher when promoting this to travellers in younger age groups. Another young traveller, aged 23, also said he adapts his media usage while travelling, for example by avoiding following the news – ‘I want to focus on travelling’, he says. This does not affect his usage of social media, however: he still admits posting a lot of WeChat moments during his trips.
Chapter 4

Recommendations

4.1 General advice

To make travel-related marketing targeting Chinese consumers as efficient as possible, Chinese media consumption habits and the traveller’s customer journey (described in previous chapters) need to be considered. A key step is to identify where in the customer journey the traveller would be most open to triggers, and what action or decision it is one wants to trigger. This depends on several factors, a central factor being whether one is selling a whole travel idea or a specific trip component. Selling a whole travel idea can mean either representing a destination, or providing an individual product which cannot easily be fitted into the standard itineraries that Chinese people have in mind when thinking about the destination in question.

General trends in the Chinese media landscape also need to be taken into account, such as the fast shifts towards online and mobile channels. Popular new mobile formats are typically characterised by communication in the form of streams instead of batches – contributing to an overload of information, and also meaning that each piece of information can catch people’s attention only for a very limited time. Signaling values such as quality, credibility, honesty, and authenticity has thereby become crucial for anyone wishing to constantly remain at the top of people’s mind. Constantly being top of mind is not a necessity for connecting with Chinese media consumers and potential travellers, however – the interviews conducted as part of this study show that a combination of many small triggers might be just as effective for planting a seed in the form of a trip idea.

In the important social channels, users are grouped together by shared interest, personal relation, and other factors. Crowd logics and ‘virality’, and also the AI algorithms applied by the social platforms, reinforce this – leading to different pieces of information being shared within different circles. It is therefore difficult to reach a broad audience through the online channels, except through costly campaigns. Instead, the best option for most advertisers is to choose a target group by choosing channel, and by carefully targetting the right people within those channels. This gives a potential to specifically reach potential travellers who either might be willing to spend more than others for a travel product, or have some other desired characteristic.

4.1.1 Reaching potential Chinese travellers, despite a low budget

The below list shows marketing strategies which can give good value for money even if the budget is tight.

- **Let today’s visitors do the job** by spreading the word. This can be encouraged by providing photo-friendly spaces attracting travellers to take selfies or other photos, and Wi-Fi connection to facilitate instant sharing in social media. (See Section 4.1.8.)

- **Work with ‘budget influencers’**, for example by making a deal with blogging students or other Chinese living at the destination. Collaboration with influencers doesn’t have to mean working with the biggest KOLs; smaller influencers who interact a lot with their followers will also have an impact among their audiences. (See Section 4.1.9.)

- **Coordinate with other local travel product providers** to pool resources and promote a travel concept together, and make sure to be featured on the destination’s website. If there is no website for the destination: build one together with other product providers and/or tourism organisations. (See Section 4.1.7.)

- **Become visible through the largest OTAs.** (See Section 4.1.5.)

- **Make sure the website is indexed by Baidu**, and work with basic search engine optimisation. (See Section 4.1.6.)
● Be visible in channels built on user generated content, such as review sites, community travel planning platforms, and other online channels where having a presence is free of charge.

4.1.2 Next steps for destinations and product providers with more resources

With a larger budget, more options become available:

● Advertise through WeChat and other social media, targeting a carefully selected audience. (See Section 4.1.4.)

● Build an active presence in selected online channels, and allocate the resources needed to interact and take part in discussions through official accounts on WeChat, Weibo, Douban, Zhihu, or other social and community platforms. (See Section 4.1.4.)

● Get a bigger footprint by being present through more channels at once.

● Apply an offline+online strategy, to leverage repetition by connecting with the same potential travellers through multiple touchpoints. For example, coordinate campaigns on billboards and in social media. (See Section 4.6.)

● Collaborate with ‘medium influencers’ who have a strong following within a certain segment or a certain theme, and let them share texts, photos or videos created at the destination with a topic or theme they have credibility in. For example, food influencers can do content marketing by recording a cooking video exploring the local cuisine. (See Section 4.1.9.)

● Optimise the website for China, by adapting the content, making the format mobile-friendly, ensuring it loads instantly, etc. (See Section 4.1.7.)

● Advertise on Baidu, to become visible next to search results related to the destination or travel product theme. (See Section 4.1.6.)

● Work with VR platforms to convey the product to early adopters of this immersive technology.

4.1.3 A strong online presence is more important than ever

Due to the fast shift from offline to online, being visible in online channels is more important than ever. Social media are the most important at the inspiration phase. For marketing specific travel products to travellers who are already in the stage of planning and booking, OTAs such as Ctrip and Tuniu are the most important channels, together with the dominating search engine Baidu. OTAs are most important when the traveller is concretising the trip and booking, although some travellers use them throughout their customer journey. The search engine Baidu is important at all stages where the traveller is searching for information, which can be for checking how interesting the destination featured in an inspiring photo really is as well as for finding detailed information about what to do there. This is also the case for official websites, which are additionally used for booking.

4.1.4 Four ways to connect through social media

For inspiring would-be travellers to get a new idea of visiting a destination, or doing a kind of trip they have never done before, social media such as Weibo – and especially WeChat – are most important. Potential travellers can be reached through these channels in four ways:

● Buying sponsored posts which appear in users’ feeds (WeChat moments). This is a way to reach a large audience, though the high costs for campaigns targeting Beijing and Shanghai make it most attractive for targeting travellers from up-and-coming second-tier cities. An example of a sponsored moment campaign is an ad posted by Tourism New Zealand, which featured a photo from one of the shooting locations from the film The Hobbit. The ad got 5.6 million
views and increased the tourism bureau’s WeChat followers with 5,200.\textsuperscript{113}

- **Setting up one’s own official account**, to share materials with followers and build a stronger connection with potential travellers following the account. This becomes especially important for larger players, such as destinations and national tourism organisations. Having an active presence takes a lot of work, and the reach will be limited for companies who have not already attracted a large audience. Official accounts can be used as a booking channel, so travellers can purchase one’s product without turning to a different channel.

- **Collaborating with key opinion leaders (KOLs)**, who can promote a travel product or destination to their followers through their official accounts. (See Section 4.1.9.)

- Connecting indirectly through **encouraging today’s visitors to share their experience** with their friends. (See Section 4.1.8.) This takes longest time, but trust-issues with other channels make social sharing a particularly strong way of connecting.

4.1.5 Use OTAs to show your existence in the concretisation stage, and your USPs in the booking stage

Most independent outbound travellers will visit OTAs’ sites at least at some point, and some do all of their travel preparations there. Due to low-price strategies applied by the OTAs, the margins from selling through these are lower than in other channels, but they are also a way to be visible. In the seed and concretisation stages, travellers mainly want to see that there are good options for hotels etc., while in the detailed planning and booking stage it becomes important to show available features.

4.1.6 Use Baidu to be visible where travellers first turn to check out a destination

The most basic measure that must be taken is to make sure one’s website is indexed by Baidu, so that it has a chance of showing up among search results. There are several ways to make Baidu index a websites – the most straightforward being manually submitting the site’s URL (uniform resource locator) to Baidu.\textsuperscript{114} The next step is to apply search engine optimisation (SEO) to the site. This is done in different ways from SEO for Google, and many guides for it can be found online.\textsuperscript{115}

Placing ads among search results can be an efficient way to get traffic to one’s official website. This is especially relevant for organisations at a destination level, since Baidu is where people typically turn to make initial research about destinations after seeing an inspirational trigger. One should be prepared for a complex setup procedure.

4.1.7 Ensure your website works well in China and on mobile

Official websites are the second most popular channel (after OTAs) for booking most individual travel products – the most popular for booking restaurants and rental cars – according to the survey. Having a website that allows convenient booking, and targeting users who prefer direct booking, can be one way of escaping the small margins offered by OTAs. To keep travellers interested once they have reached one’s official website:

- Make sure that it loads quickly. Chinese internet-users are easily distracted, and might quickly turn elsewhere if a site takes time to load. Unfortunately, the nature of the Chinese internet (including filters and limited cross-border bandwidth) means that sites located outside China tend to load particularly slowly, and a page loading instantly in Europe can sometimes take half a minute or more to open in China. One way of reducing this problem is to ensure that no parts of the site, including third-party analytic tools, are using services that are blocked in China. Connections to blocked media such as Facebook and Google can slow a site down considerably. The most efficient way of making a site load faster is to use a server located within Mainland China; but restrictions for foreign companies mean that the
viability of this approach needs to be analysed for each case.

- If the site includes a booking function, it should accept Chinese payment methods such as UnionPay, Alipay, or WeChat Pay. This will make booking much more convenient for travellers, who might otherwise turn to OTAs or other sales channels which offer convenient payment options, but where margins are lower.

- Use the Chinese language. Preferably, don’t just translate the site, but also adapt it to Chinese conceptions about the destination and country by taking common configurations and associations into account. (See Section 4.4.)

- Spend most effort on perfecting the quality of the site’s mobile version. The ‘mobile first’ attitude has come further in China than in Europe.

One way of building a stronger web platform is to coordinate and collaborate with other travel product providers at the destination, and/or with local or national tourism organisations. An example of how joint online marketing and sales channels can be built can be seen in the Icelandic tourism trade’s online platform ‘Guide to Iceland’. The site integrates information about a wide range of travel products, and lets travellers make reservations. The site also includes general travel information about Iceland. Taken together, these features mean travellers can use the site throughout all stages of their customer journey. It is also possible for visitors to the site to contact local residents and frequent visitors to the country, increasing the feeling of authenticity. A presence in other online channels including Weibo and Ctrip is used as a complement to attract visitors to the site.116

4.1.8 Encourage travellers to share

Hearing travel stories and recommendations from friends and family members is one of the most important inspirational triggers. This can happen offline in conversation, but more typically through status updates in social media, such as WeChat moments. Although these channels can be used as a direct touchpoint through advertising, the role it has as an indirect touchpoint through which travellers show their experiences to their peers is more important. The basic requirement for getting into this channel is to make sure visitors are having a good time. But there are more ways to encourage travellers to share: one method commonly used by establishments within China is to provide photo-friendly spaces, increasing the chance that visitors will be inspired to share photos from a particular place. Providing free Wi-Fi means more visitors (including those who have not arranged internet connection through mobile phones or portable Wi-Fi) will be able to post updates instantly. The chance of visitors sharing their experience online also increases by letting WeChat users ‘check in’ to a location such as a hotel, shop, or restaurant, using a WeChat function similar to that on Facebook.

4.1.9 Work with KOLs

Working with KOLs (key opinion leaders) or ‘online stars’ is a way of getting noticed among a wide audience, and especially for connecting at the inspiration phase. Having KOLs mentioning a destination or travel product has the potential to plant a trigger among a wider audience compared to posts shared among circles of friends, while being perceived as more credible compared to ads. Switzerland Tourism has engaged in one such collaboration, through appointing the Chinese actor Huang Xuan as its national tourism ambassador.117 Tourism New Zealand did a similar measure a few years earlier through a collaboration with actress Yao Chen in 2012 – whose Weibo posts from New Zealand are believed to have contributed to the 30% increase of Chinese travellers to the country in the following year.118

While famous actors and other superstars can be highly influential, collaborating with those might be viable only for national tourism organisations and very big players in the tourism industry. This does, however, not mean that the logic of working with KOLs can not be applied by product providers destination organisations with smaller budgets. After defining a target group, such as people interested in a certain theme, more ‘budget’ online influencers – such as bloggers – can be identified who are KOLs within this group without being as high-profile as the famous actors.
4.2 Don’t underestimate triggers in offline channels

As discussed in Chapter 1, there is an ongoing shift from offline to online media, and this shift is most apparent among the younger parts of the Chinese population. But even though printed media is used less and less, this does not mean that printed media has become irrelevant. Some printed publications retain relevance as sources for travel inspiration – a good example being travel magazines, which are read by people for whom looking for travel inspiration is a hobby. There is also a segment among media consumer in which traditional media formats, including printed newspaper and magazines, are preferred. For some media consumers the shift away from offline channels is thus slower than for others.

Offline channels that can be used to reach a wide general audience include advertising in public transportation such as metro trains and taxis. Interest in a destination, and the action of actively searching for information about it can be triggered for example through an ad with an inspiring photo. (See Section 4.3.)

4.3 Trigger inspiration through beautiful and honest photos

Photos are the single most important trigger when it comes to evoking an initial interest in a travel idea, no matter if they are seen among WeChat moments, in travel magazines or in large ads in publich transportation. Any photo needs to be beautiful in order to be inspiring, according to the Chinese travellers who have provided input to this study. The main point that needs to be conveyed through the photo is that the experience of visiting a destination (or engaging in a travel activity, etc.) is different from the everyday life in a big Chinese city. This can be achieved through showing either beautiful nature or beautiful traditional architecture – but not people. ‘Tranquility’ is a word frequently used when Chinese travellers describe photos they find inspiring.

Visit Finland and Finnair jointly targeted China and four other countries with its campaign '100 Days of Polar Night Magic'. Launched in 2015 and designed as a recruitment campaign for a three-month 'adventure marathon', it featured images of wild winter landscapes, starry skies, and northern lights. The campaign got a lot of attention, and constitutes a good example of how photos can be used to evoke an emotional reaction through natural themes.119

4.3.1 Signal honesty

One key aspects when deciding what photo to use is that Chinese who see it do not suspect it is in any way ‘fake’:

- Avoid photos that look arranged.
- Avoid excessive post-processing of photos. Unnatural colours or the slightest ‘Photoshop feel’ can make Chinese consumers feel someone is trying to trick them.
- Use wide-angle photos where possible, so people can see that there is no ugly factory next to that picturesque small house.

360 degree photos are a trend seen as honest and real by some consumers, since they let viewers see ‘everything’ in all directions. This kind of photos can be shared from Weibo accounts, and can for example be shot by cheap cameras from the Chinese electronics manufacturer Xiaomi. Livestreamed video, which as well as other video formats is on its way up, also has an honesty connotation. It can be a good format to use in a collaboration with a travel influencer. One format increasing in importance thanks to tech innovation is video shot from so-called ‘selfi-drones’, which travellers can bring with them on trips.

4.4 Tailor marketing to fit with destination’s ‘standard configuration’

The best way of connecting to Chinese travellers depend on how well a product fits into a destination’s ‘standard
configuration’ – the travel idea that most people will start from after settling on a destination. It is a set of conceptions about what should be seen and done at the destination, and can have different levels of detail. Standard configurations are reinforced as travellers share travel experiences in social media and online travel communities, or tell travel stories to friends and family back home. **New travellers’ ideas about a destination are thereby heavily influenced by the itineraries of previous travellers**, who are in turn influenced by travellers before them. The separate nature of Chinese social media and travel channels contribute to the formation of standard travel configurations among Chinese that are not necessarily the same as what people at the destination assume.

### 4.4.1 Listen to Chinese visitors to learn what the standard configuration looks like

Where, and to what extent, a certain travel product fits into a standard configuration affects which stage of the consumer journey travellers should be reached at. It therefore becomes important to **understand the standard configuration for the specific destination**. Chinese travellers themselves are the best source for understanding this, either through direct interaction or through studying online communities:

- **Chinese visitors who are already at the destination can be interviewed**, as a way to let travellers freely describe their view on what the destination is all about.

- Hotels and other establishments using review surveys can add questions about travellers’ general ideas about the destination. In addition to traditional questions regarding how visitors find the hotel, these surveys can capture visitors’ ideas of what should be seen at the destination and their general associations connected to it. To get more respondents, surveys can be done through channels which are convenient for Chinese respondents to use, such as WeChat. Respondents can also be offered a small reward.

- Another way is to look at **Chinese online travel media** such as Qiongyou, an online community whose members review destinations, attractions, and travel products, and also recommend itineraries to each other. A command of the Chinese language is helpful for navigating Qiongyou’s site, but a glimpse of what is important can be had by opening the URL ‘place.qyer.com/’ followed by the English name of the location. (E.g. ‘place.qyer.com/brussels’. ) For some destinations top recommendations are the same as in international channels; in other cases they are different. As an example, a look at the destination page for London reveals that locations with a connection to Harry Potter has a notably central position for visitors to the city.

### 4.4.2 Attach products to an existing configuration if possible

If the travel product one wants to sell is easy to fit into a standard configuration – for example a hotel in which travellers can stay while doing the ‘must-dos’:

- **Make the product visible in standard channels where the destination is already visible**, such as booking sites.

- **Let marketing attach to widespread associations** with and perceptions of the destination, as long as they are positive.

A similar strategy can be applied when marketing an attraction which is not included in a standard configuration, but that some component from the standard configuration can easily be switched for by the traveller (e.g. by being located nearby).
4.4.3 Connect in the inspiration phase to construct a new configuration

The further away from the standard configuration your product is, the more difficult it becomes to convince travellers to stretch their idea of what to do at the destination enough to deviate from the beaten track to come to you. This can for example be the case if more time that what is considered ‘normal’ would be needed, for instance if travellers need to go out of their way geographically. Especially travellers visiting more than one destination during one trip tend to settle on a travel route – allocating time at each destination according to what is needed by the destination’s standard configuration – before planning what to do at each destination. This makes time a limiting factor for products that do not fit in.

One opportunity for products that do not fit into any standard configuration lies in a tendency within an emerging segment of outbound travellers to aspire to get away from the crowds, and especially from the Chinese crowds. For attracting this segment, products should be marketed as alternative and unique.

The remaining option is to connect to the traveller earlier in the consumer journey, already at the inspiration phase:

- Formulate an idea for a new travel configuration, built around the product.
- Choose a form of ad that is inspirational, for example a beautiful photo. (See Section 4.3.)
- Actively encourage visitors to promote the product and destination to friends and in social media – this will contribute to the construction of a new configuration that includes the product. (See Section 4.1.8.)
- Consider cooperating with other product providers at the location in constructing new configurations through joint promotion.

4.5 Connect in spaces where a niche audience is present

For products or destinations with a niche theme, one should connect with potential travellers in channels and spaces related to the theme in question. For example, one traveller interviewed for this study tells a story of how she became interested in travelling to the Japanese town Uji – famous for its tea – after having first seen a TV documentary about the town, and then seen its name in a tea shop. In this case, the name of the town was likely not present neither on TV nor in the shop because of any advertising campaign, but the same logic can be leveraged by providers as part of a marketing effort. The logic lies in building a presence in either media channels or physical spaces where people with an interest in the theme can be found.

Which spaces should be chosen depends on the theme in question. If there is a sports theme, one can consider cooperating with local clubs or sport associations in China. If the theme is related to food and drinks, working with a store or restaurant chain might be an option. If the product one wants to sell is a tour of vineyards or a stay in a European wine castle, this could for example be marketed through one of China’s wine store chains.

4.6 Leverage repetition of triggers by connecting at multiple touchpoints

A trigger is more likely to catch on with a potential traveller if it is both repeated, and comes from different sources. Apart from actively communicating through more than one channel simultaneously, channels where a destination or product is already exposed should be hooked on to. For example, TV series and films are commonly mentioned as initial triggers of an interest in destinations, and marketing of the same destinations can reinforce those triggers either by actively promoting travel products with the cultural phenomenon as a theme, or just by reminding individuals or the existence of the destination they had become interested in. Reinforcing triggers that come from friends can be especially strong; encouraging visitors to share their experience can therefore be an important component in a multi-touchpoint strategy. An option is to identify a limited target group for one’s product and focus on reaching them, to reach a momentum within a community in which a higher degree of repetition can be reached than if marketing and resources are spread among a wider group. To some
extent this will automatically be the case for promotion done by previous visitors, who will spread the word among their own circles of friends.
Appendix

Methodology

The study has taken a mixed methods approach:

- Qualitative as well as quantitative information was gathered from existing published research and synthesised into an overview of the current and future role of online and offline media for Chinese travellers. The research was complemented with interviews with five travel experts in China.

- In order to get a deeper understanding of today’s media habits, and how these influence booking behaviour and purchase of travel products, a survey was conducted with 1,853 respondents (after a strict process of filtering out respondents with a response pattern that put into question the credibility of their answers) aged 18-45 in the Chinese cities of Beijing (378), Chengdu (351), Guangzhou (413), Shanghai (355), and Wuhan (356). The respondents have all travelled independently and internationally in the last 24 months and have an interest in Europe as a destination. 53% of respondents are female, and 61% hold a bachelor’s degree. Using a statistical technique known as multidimensional scaling to analyse the survey responses, information and booking channels were clustered based on how frequently they are used or rated as important by the same respondents, revealing different styles in media consumption and booking. Cross-tabulation was used to compare attitudes and behaviours between respondents adhering to different booking and media consumption styles.

- To gain a detailed understanding of what marketing strategies and digital technologies can be utilised to connect with Chinese consumers under different conditions, an in-depth qualitative analysis was carried out. Twenty semi-structured interviews were conducted and a focus group was held with consumers in the target group. Based on the interview and focus group data, travellers’ consumer journeys were identified. Touch points and triggers, with implications for marketing strategies and the use of digital technologies, were mapped and associated with each part of these journeys.

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