

Outbound Chinese Travelers Research

Italy

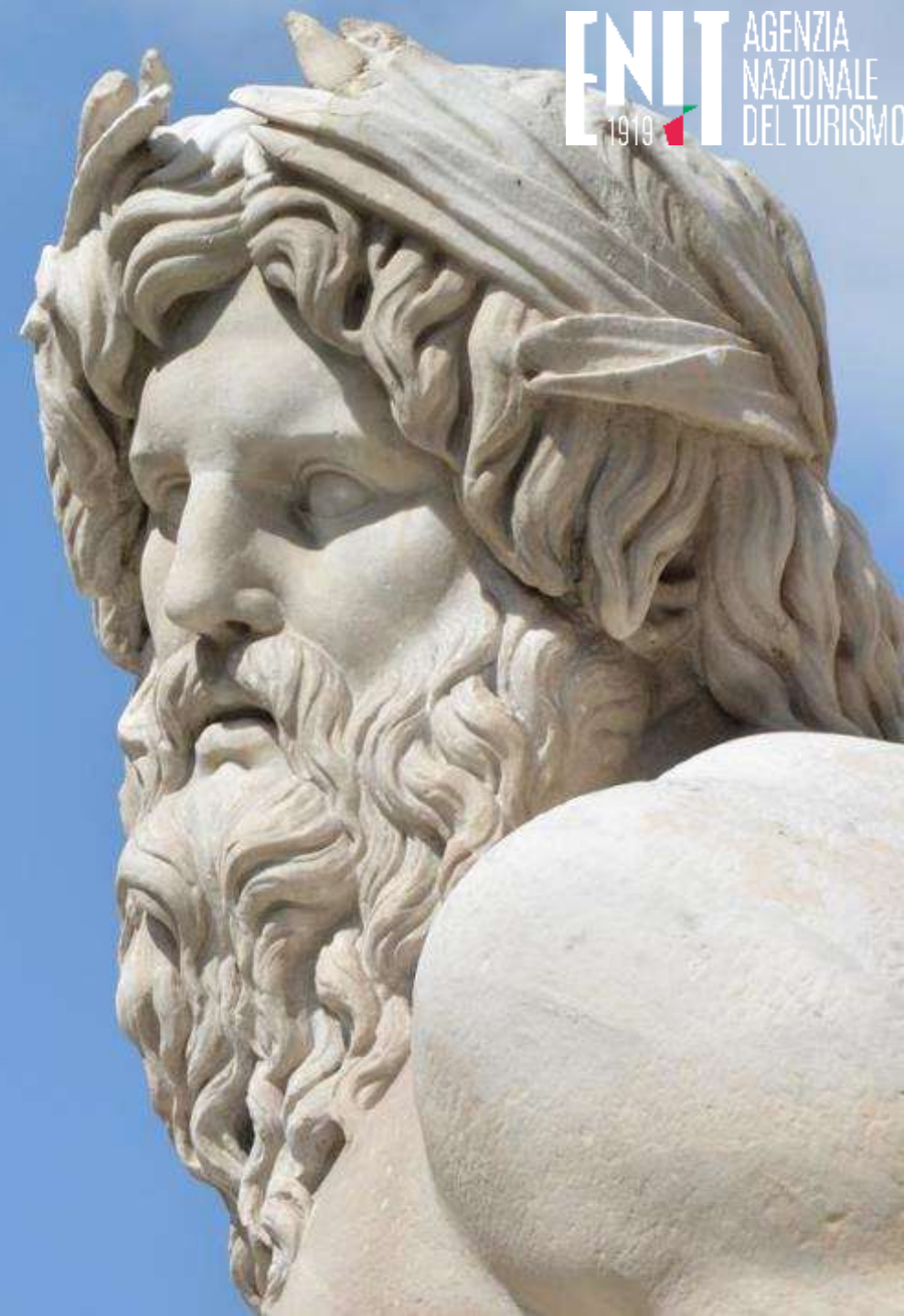
2023.04



Part 1 Traveler Behavior and Competitive Environment

KEY QUESTION:

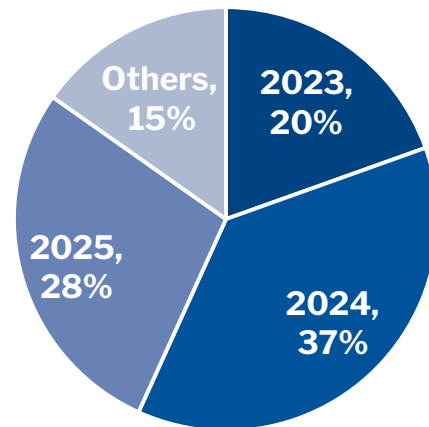
- *When would Chinese travelers consider starting to travel to Europe since the restrictions have been lifted?*
- *How is Italy's performance compared to other competitive European destinations?*
- *What's more important for Chinese travelers when choosing a destination?*



Most travelers are willing to go but need buffer time to travel to Europe. **20%** of respondents who have outbound experience since 2018 are ready to head off to Europe **in 2023**. Besides, **more than half** of total (**57%**) will start their Europe journey **within 2 years** and **85% within 3 years**.

When?

Since the restrictions have been lifted, when would you consider starting to travel to Europe?



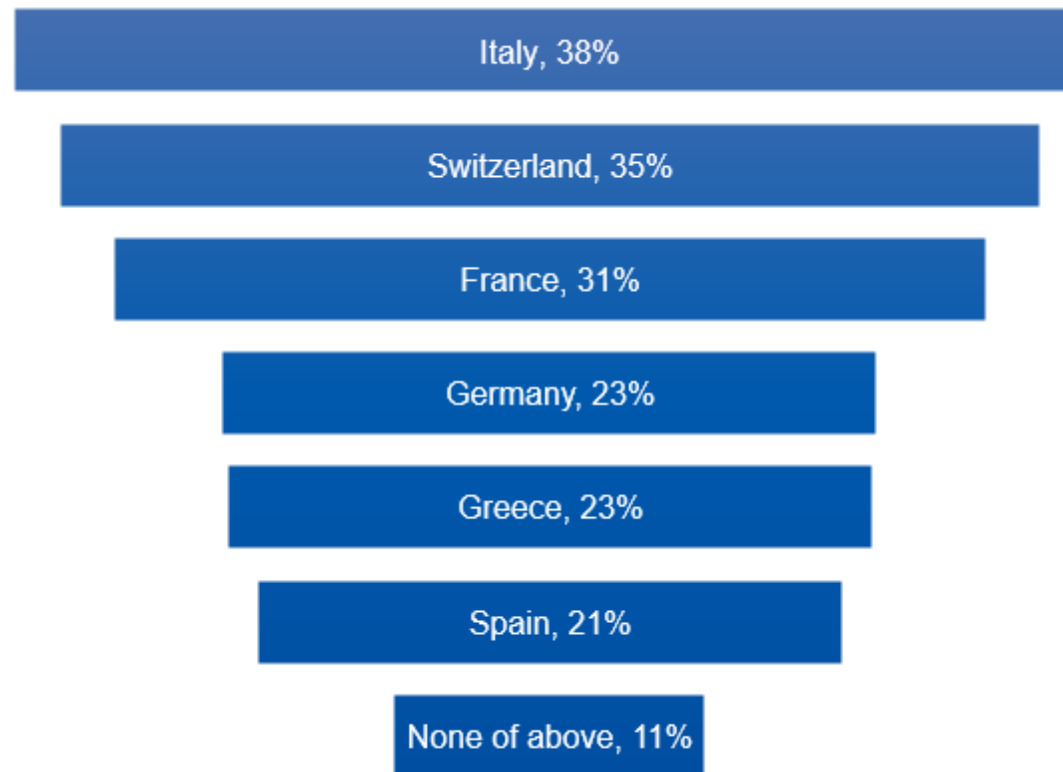


Italy is the most attractive destination (**38%**) among the main competitors in Europe. Following with **Switzerland** (**35%**) and **France** (**31%**). Ranking in the back, around 20% choose to travel to Germany. Greece and Spain.



Where?

Of the following destinations, which one would you prefer to visit when travel restrictions are lifted? [Multiple Choice]



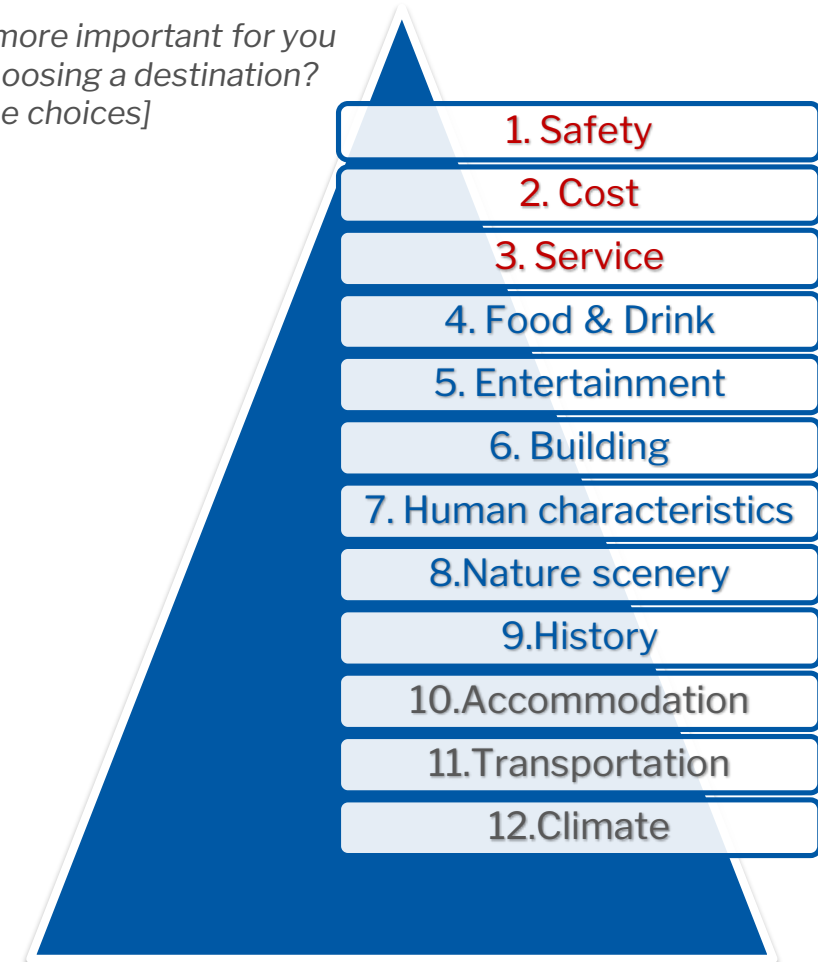
Stage 1- **Safety, cost and service** are the most vital considerations for respondents when deciding the outbound destinations.

Stage 2- The tourism activities in destinations including **cuisine, entertainment, culture and history, scenery** are the second important group of criteria to consider. What to eat, visit and experience in destination are vital to travelers.

Stage 3- Essential criteria include **accommodation, transportation, and climate** will then be considered.

What to consider?

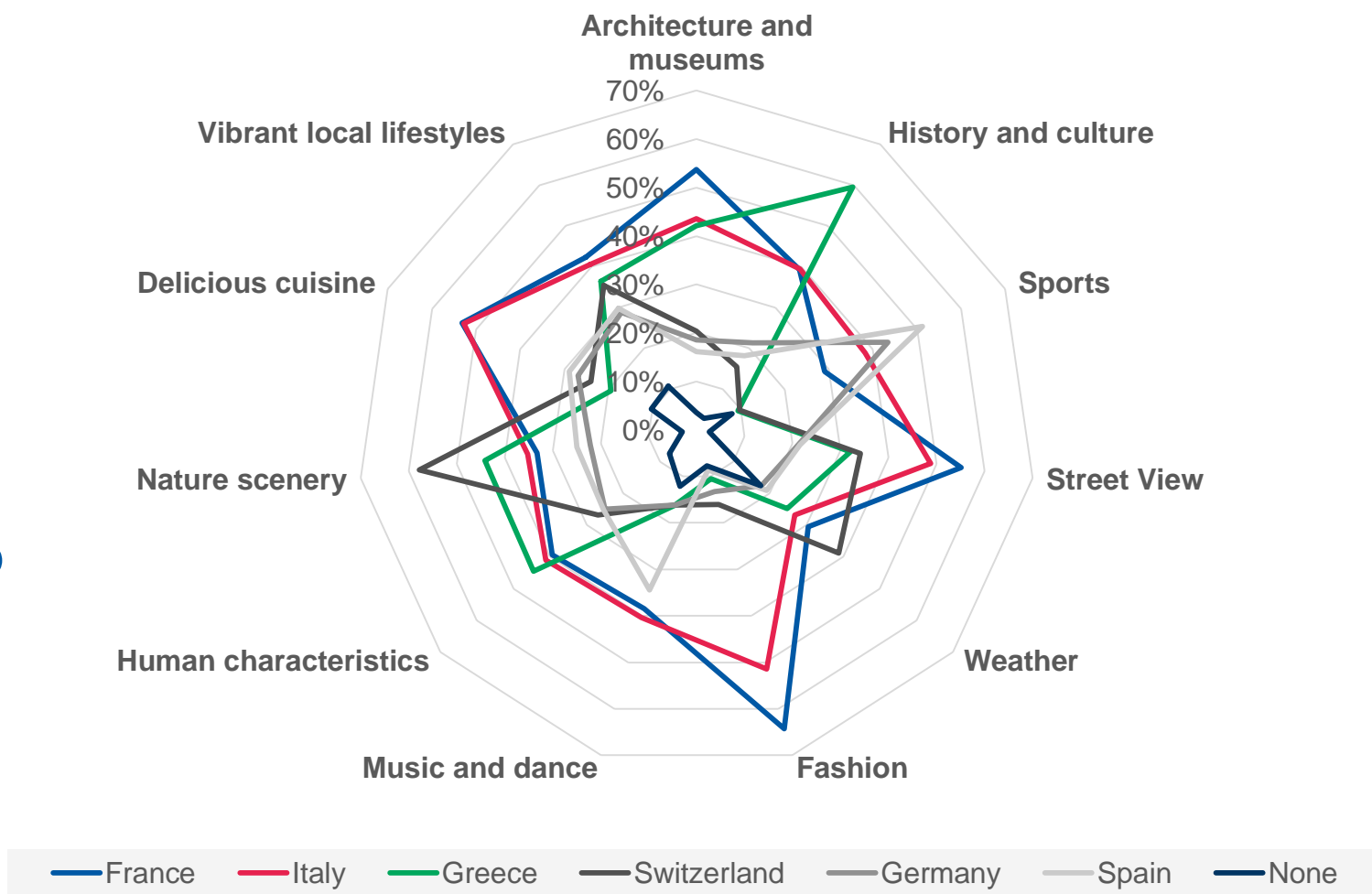
What's more important for you when choosing a destination?
[Rank the choices]



Italy, as an outbound destination, performs quite well among Chinese travelers. The country is renowned from its **delicious cuisine, fashion brands, and beautiful scenery.**

Architecture, history, and sports are also important reasons to consider coming to Italy.

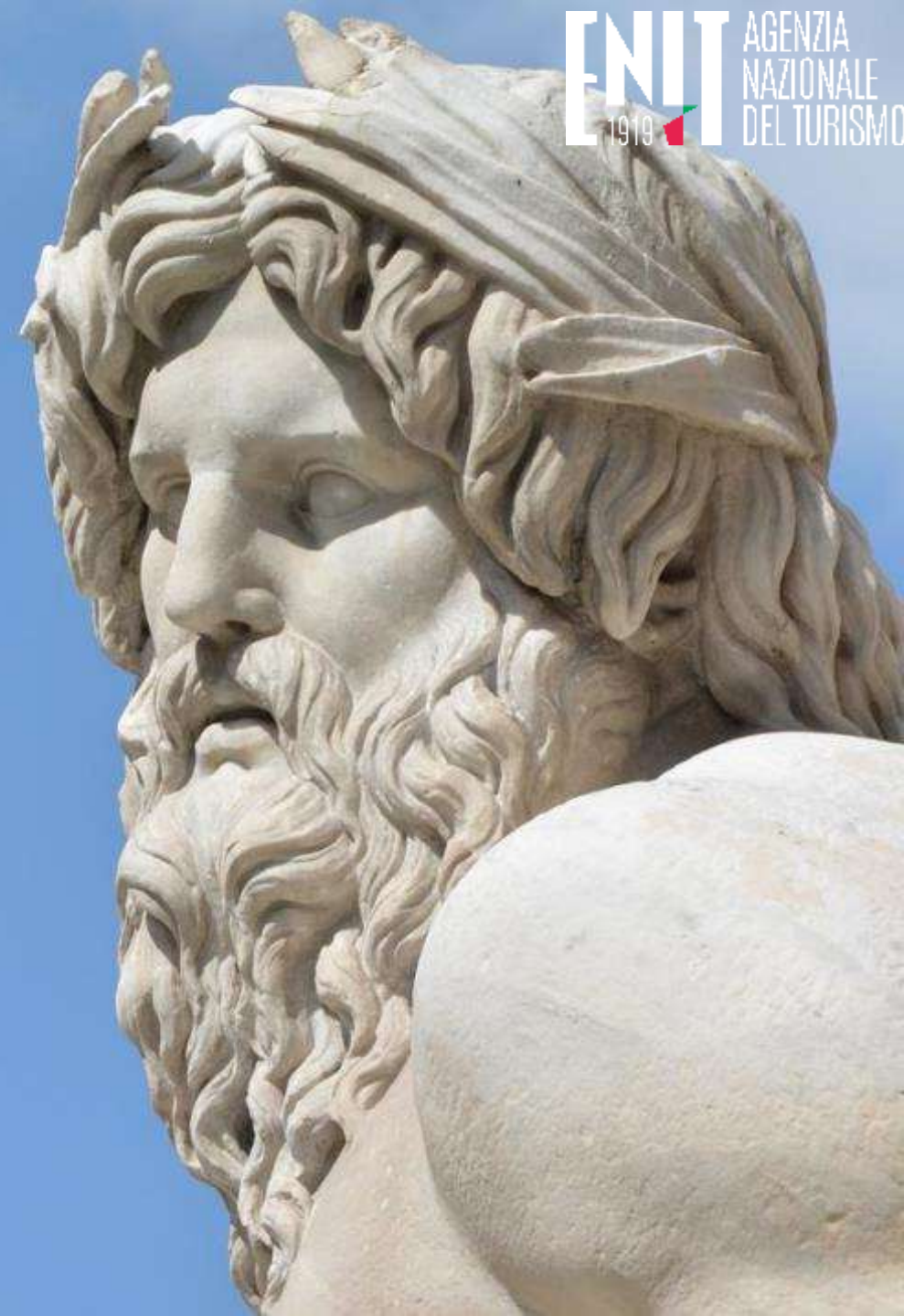
Which destination is best for the following travel aspects? [Matrix]



Part 2 General knowledge and image of Italy

KEY QUESTION:

- *Aspects that comes to your mind when thinking about Italy?*
- *Recognize the attractions located in Italy.*



When mentioning Italy, the most famous cities of **Rome and Venice** together with **food icons** (pizza and pasta) **are top of mind**, while among **popular attractions stands out the Leaning Tower of Pisa and the Colosseum**. Italy is also a synonym of **fashion, luxury brands**, a vibrant art scene – **opera, Michelangelo**, and also **sports (football)**, history and culture (**Renaissance**) will come to peoples' mind. Among Chinese travelers, Italy is a diverse country with many classic features known by many.

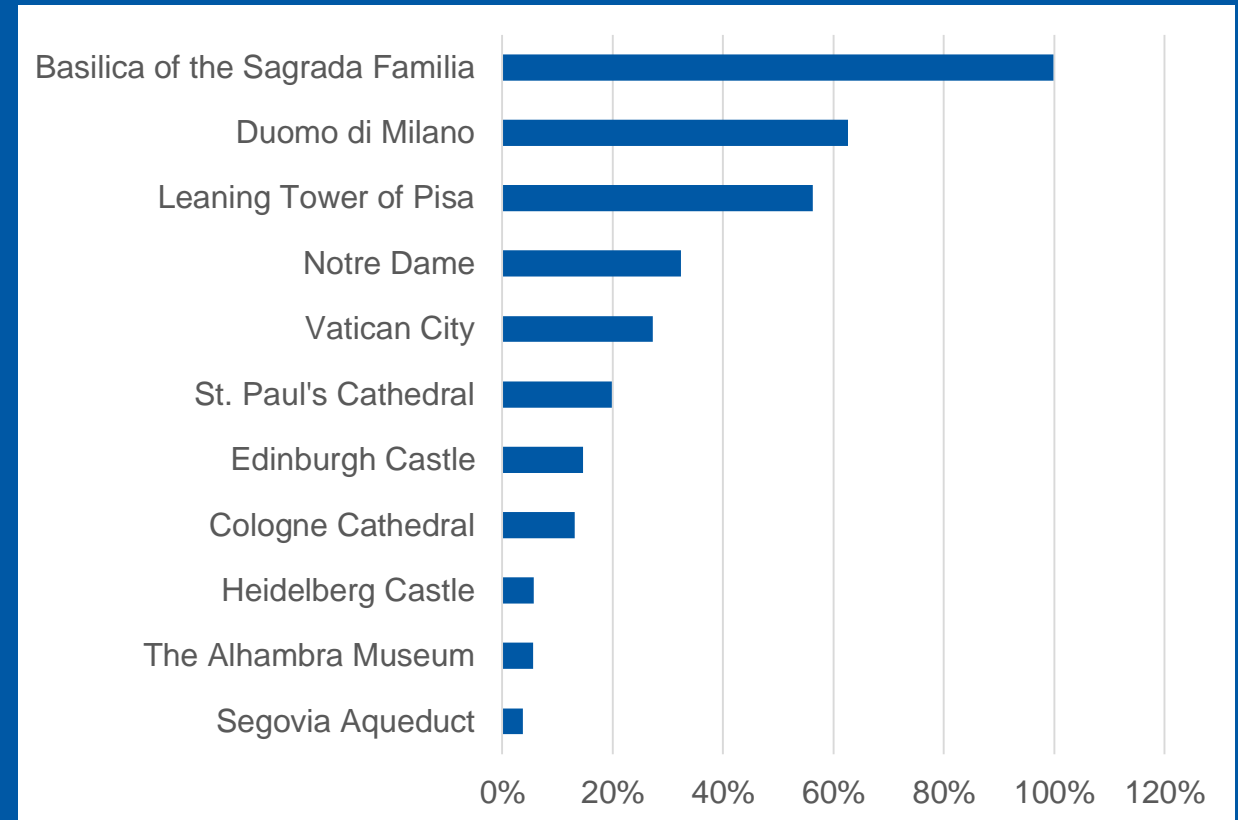


We have listed a group of European attractions and let the respondents to recognize those that belong to Italy.

According to the survey, Chinese travelers are not so familiar with the most famous Italian spots.

Pretty much all respondents (100%) have misidentified other country's attractions (such as Basilica of the Sagrada Familia) as Italy's.

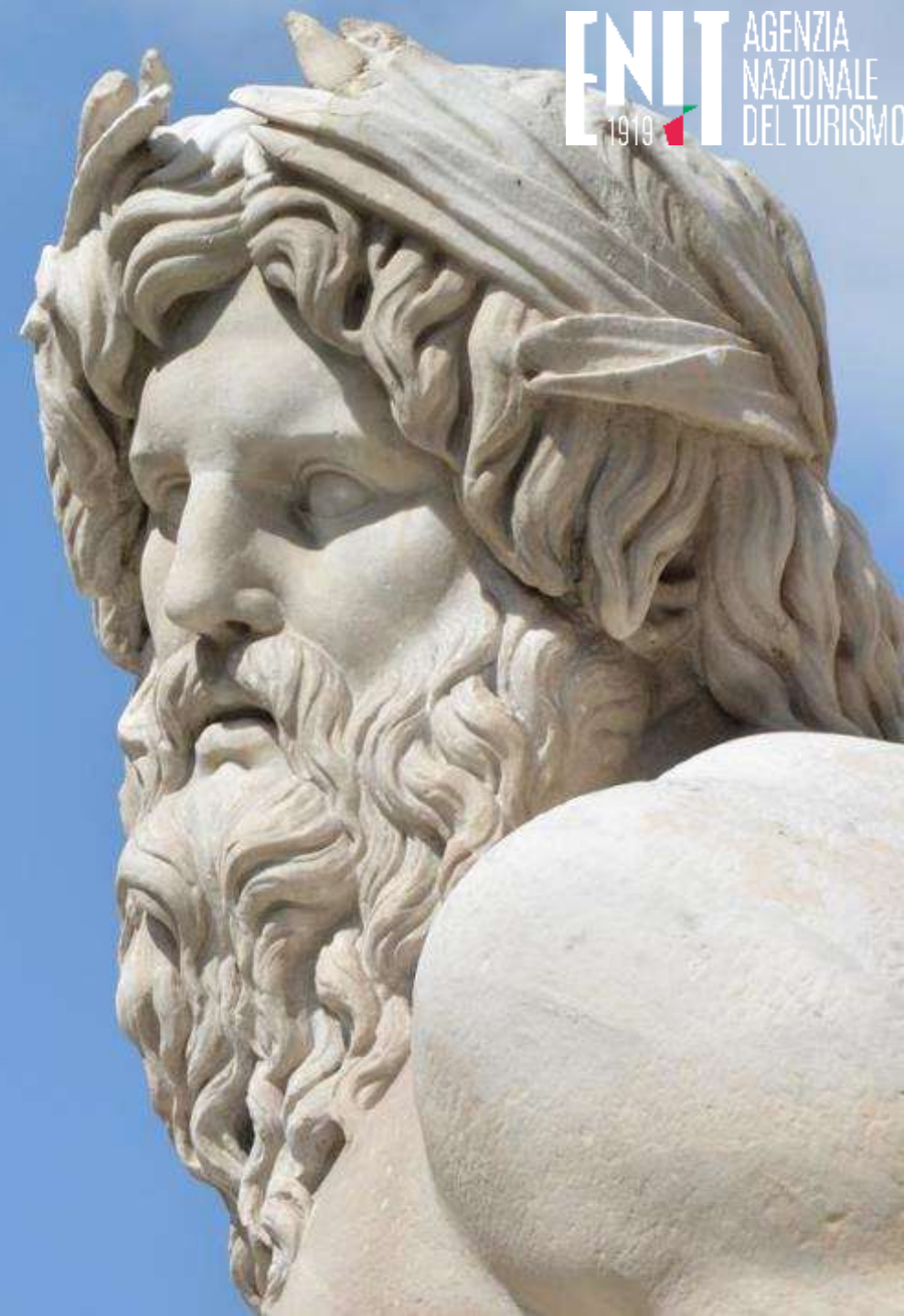
Please select the attractions located in Italy. [Multiple choices]



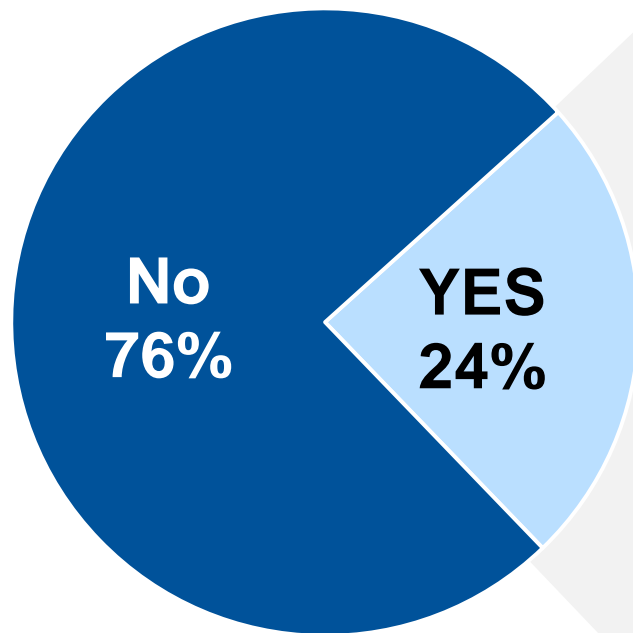
Part 4 Italy as a destination

KEY QUESTION:

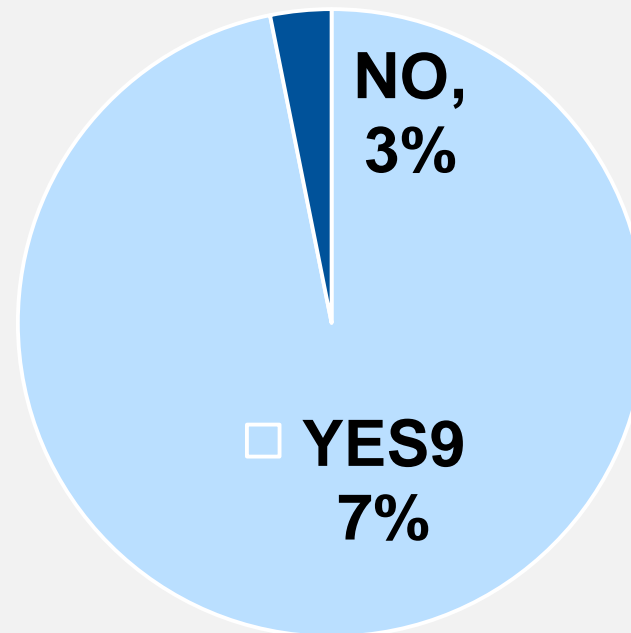
- *What would inspire you to visit Italy?*
- *What would stop you from visiting Italy?*
- *Please select up to 3 top attractions that you find most appealing located in Italy.*
- *What kinds of experiences would you like to try the most in Italy?*



There are **24%** of respondents from this survey have been to Italy before. Almost all of them (**97%**) say they will visit Italy again which reflects the good reputation Italy enjoys among first timers



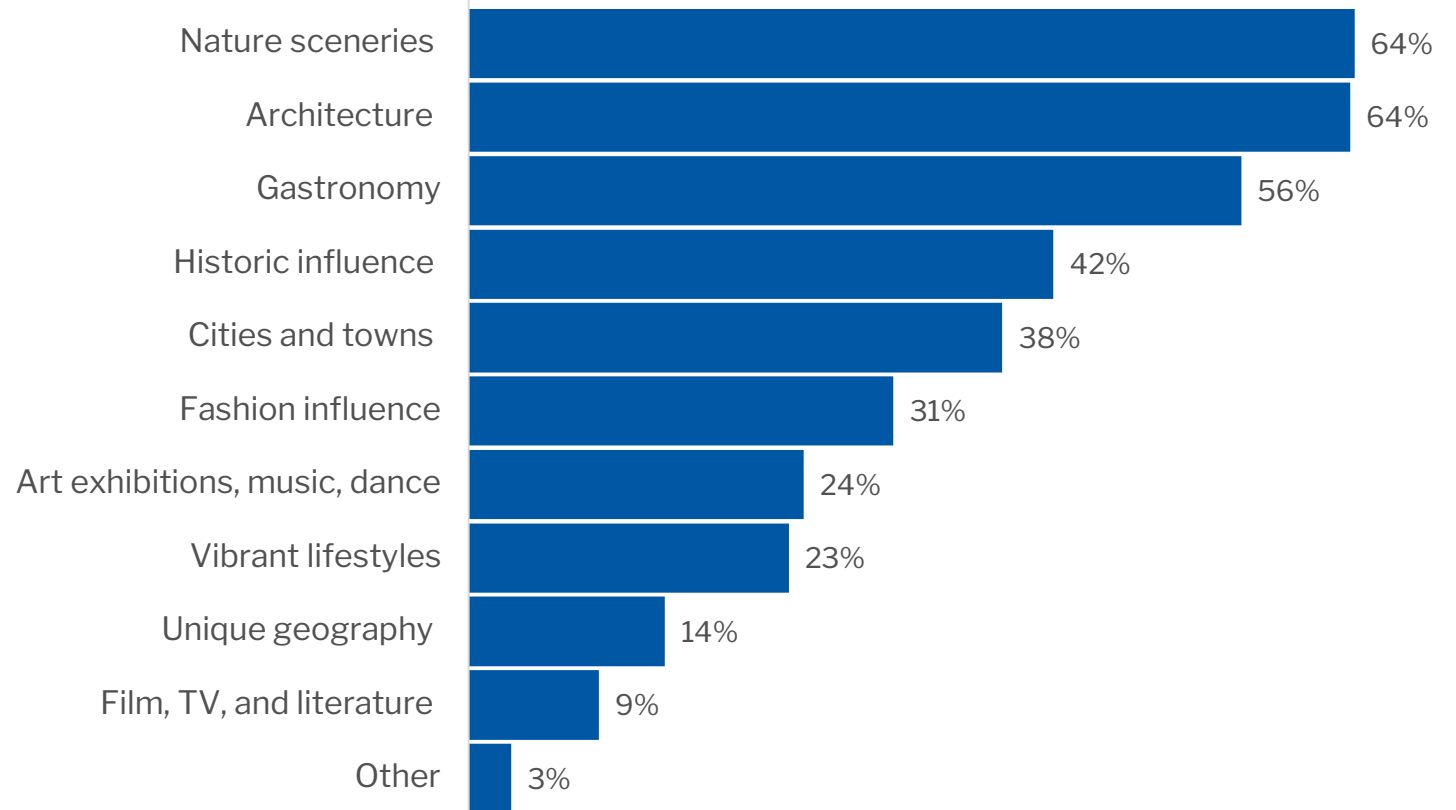
Have you visited Italy before ?



Will you visit Italy again ?



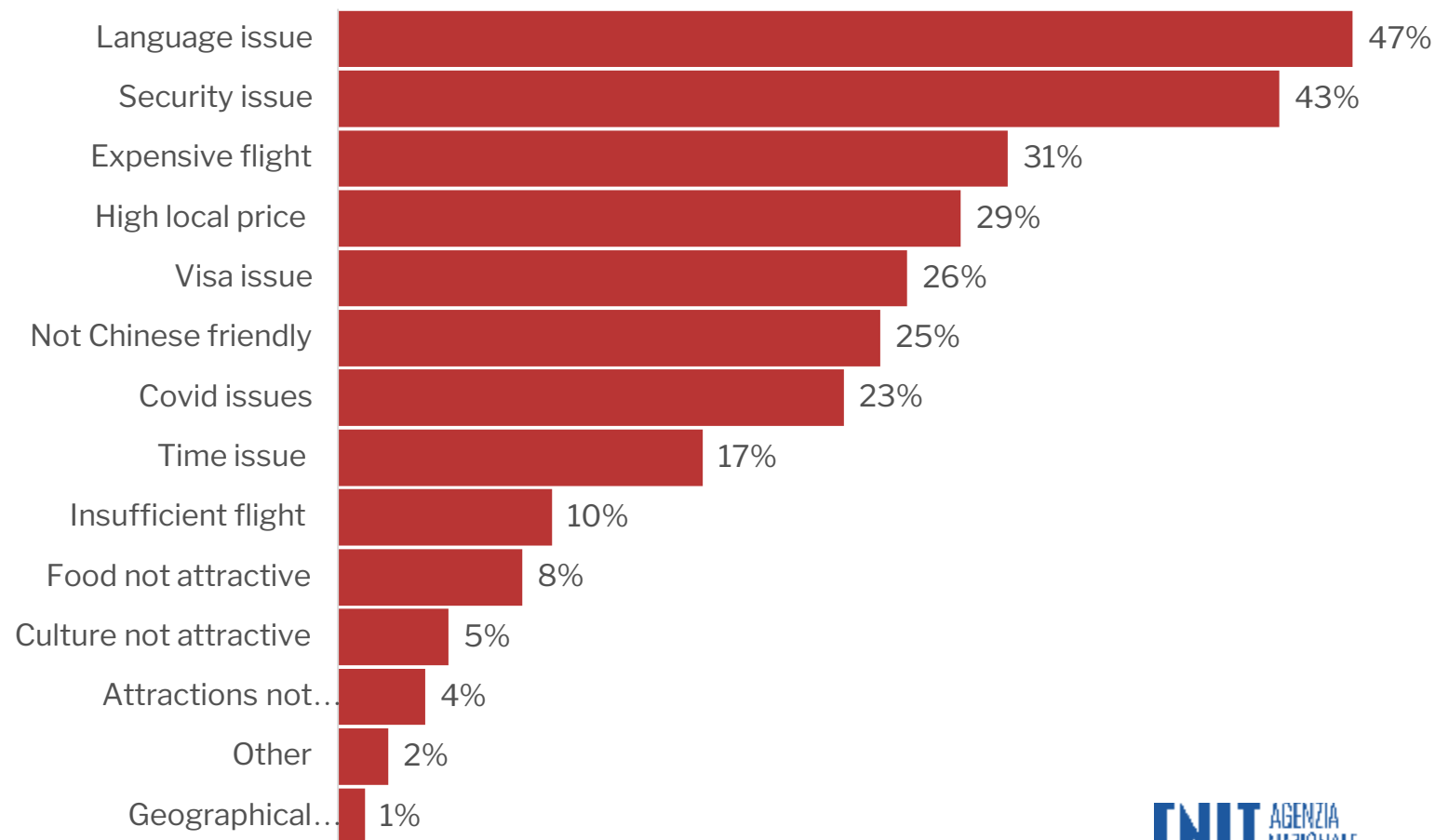
Nature sceneries (64%) and architecture (64%) are the main two reasons that inspire Chinese travelers to visit Italy. **Fashion influence** inspire the **31%**, the **lifestyles** the **23%**. **1 Chinese on 10** is inspired by **film and literature**.



What would inspire you to visit Italy? [Select all that apply]

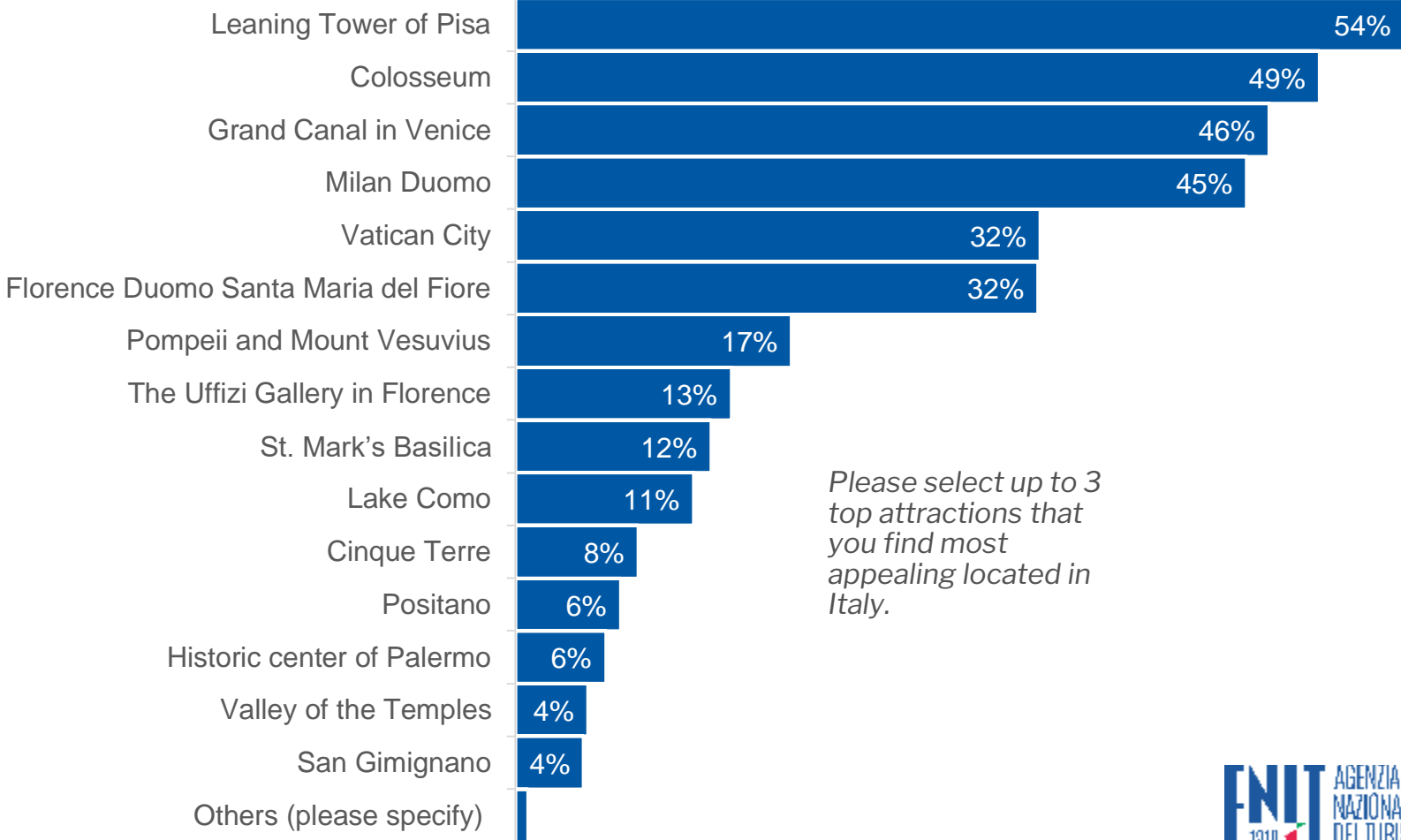


The **language barrier** is the biggest concern among Chinese travelers (**47%**). **Security concerns (43%)** is the 2° reason that stop travelers from visiting Italy. At the 3° place the cost of flights can brake tourists.



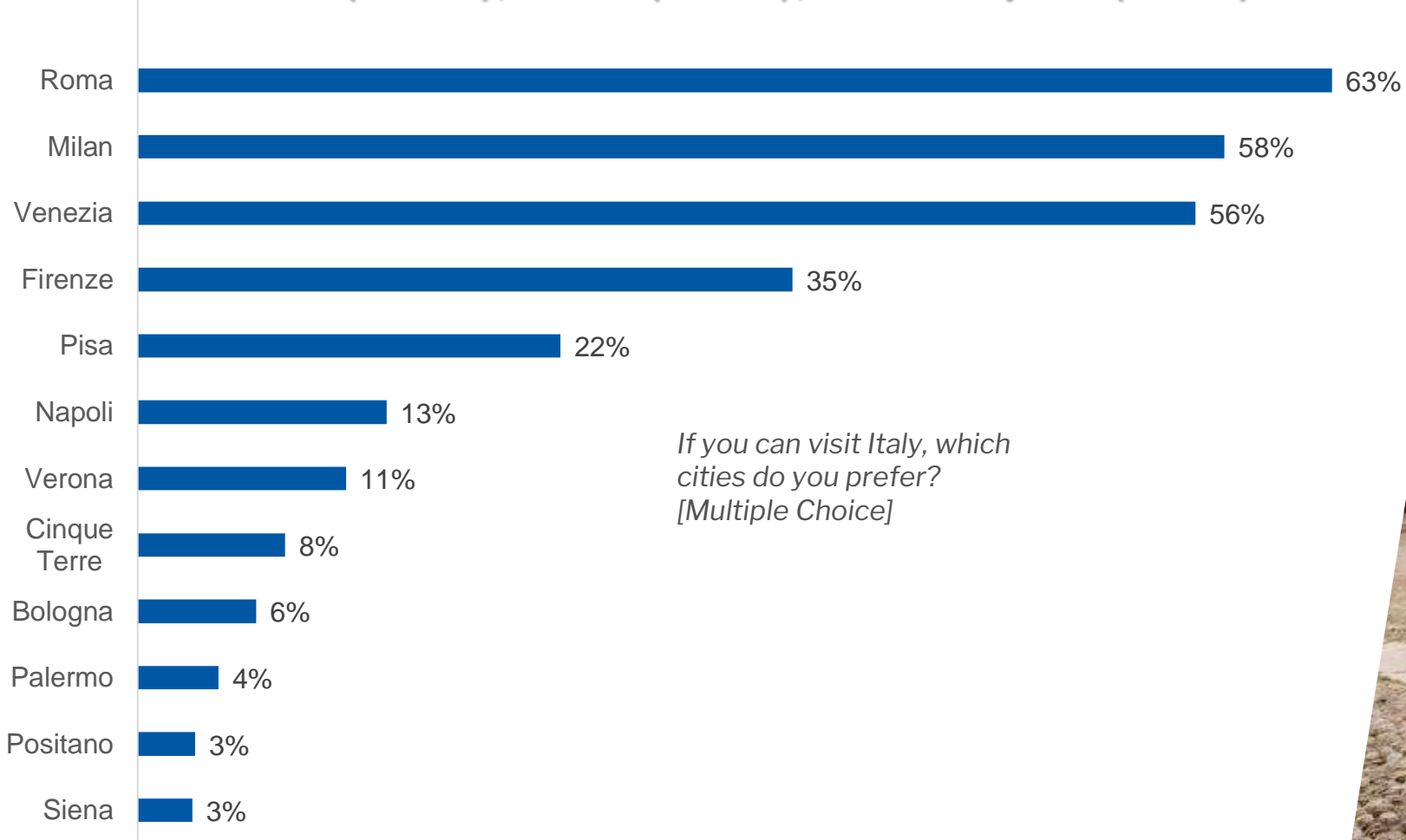
What would stop you from visiting Italy? [Select all that apply]

Leaning Tower of Pisa is the most popular attraction among the Chinese travelers, with more than half (54%) of the respondents willing to visit it. The **Colosseum** was picked by almost half of the interviewees (49%), while **Grand Canal** (46%) and **Duomo di Milano** (45%) followed the ranking.



Please select up to 3 top attractions that you find most appealing located in Italy.

Roma is the top choice with **63%**, followed by **Milano** with **58%** of respondents picking the fashion capital of the world as the most popular city in Italy. **Venezia** (**56%**) is third in the ranking, with a significantly higher percentage than **Firenze** (**35%**), **Pisa** (**22%**), and **Napoli** (**13%**).



*If you can visit Italy, which cities do you prefer?
[Multiple Choice]*





1. Shopping



2. Wine tasting



3. Fine dining



4. Visit landmarks



5. Nature scenery



6. Fashion activity



7. Sports

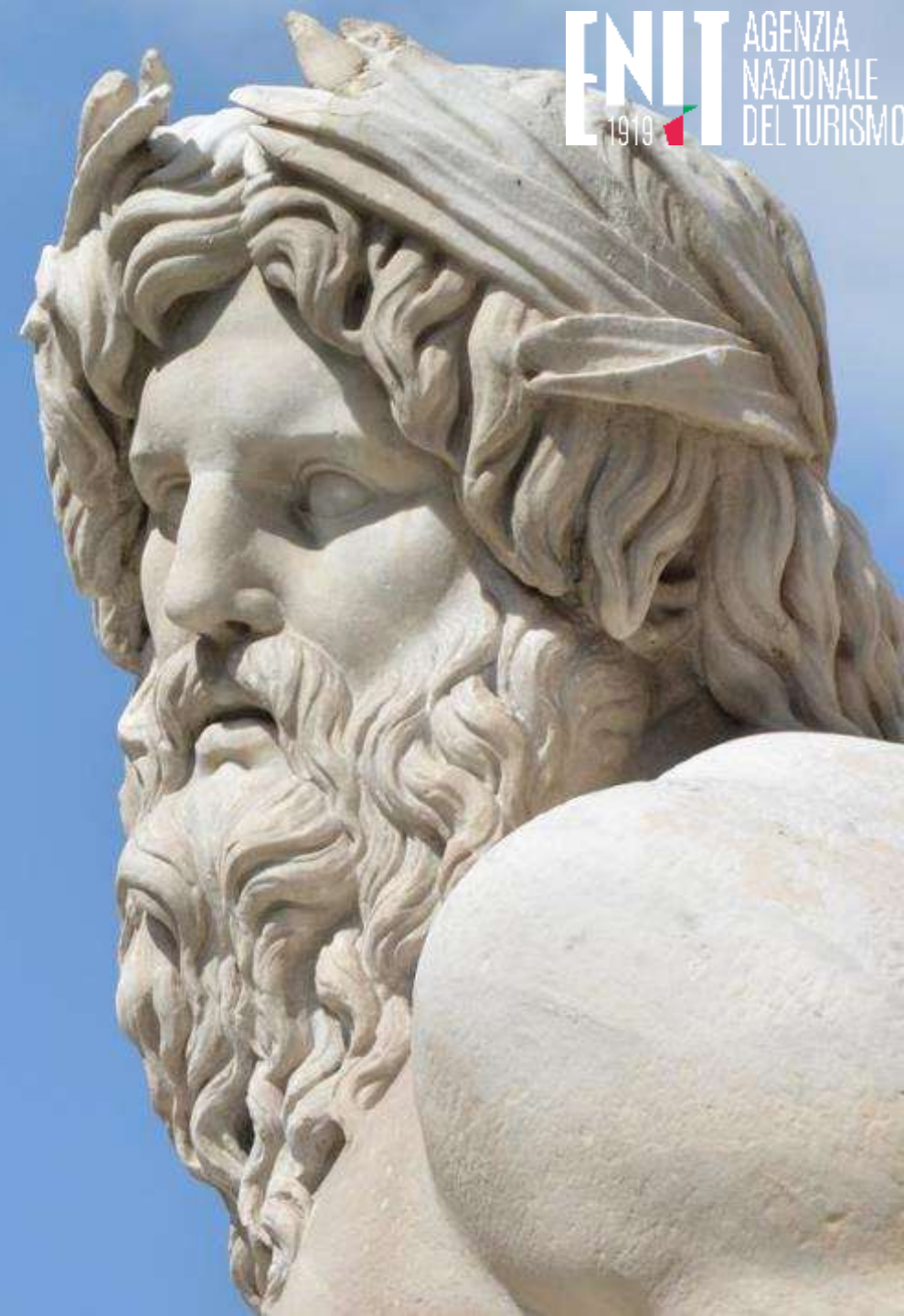
What kinds of experiences would you like to try the most in Italy? [Rank the choices]

Shopping is the number 1 experience to try for Chinese travelers, following with fine wine and food tasting, and then visiting the landmarks and natural sceneries. For some travelers, fashion and sports (football in particular) are important activities to try in Italy.

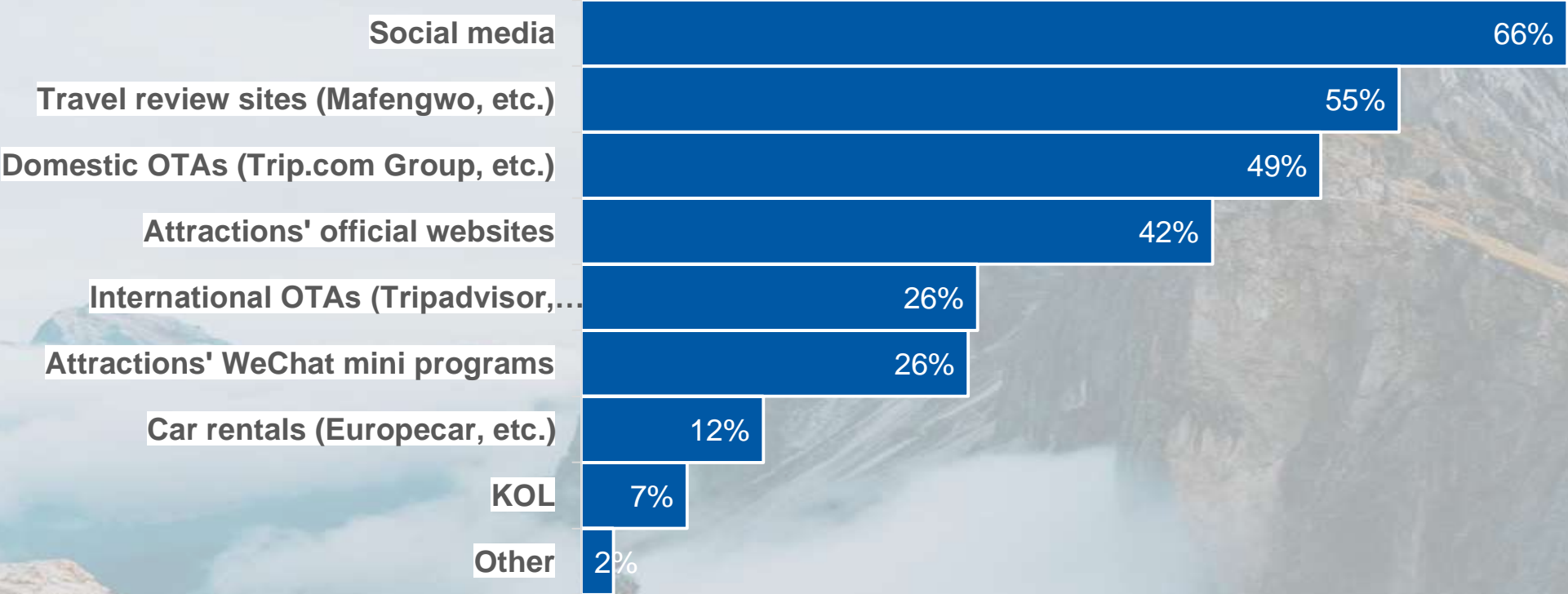
Part 5 Information source and key messages

KEY QUESTION:

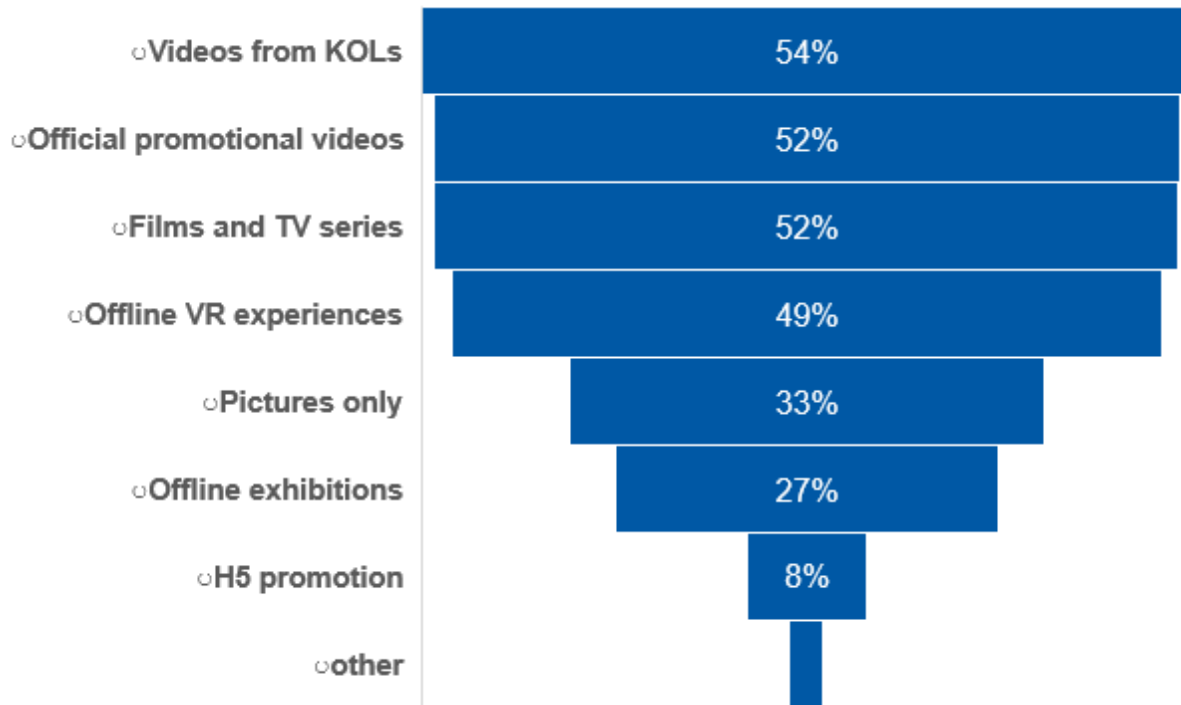
- *Information channels*



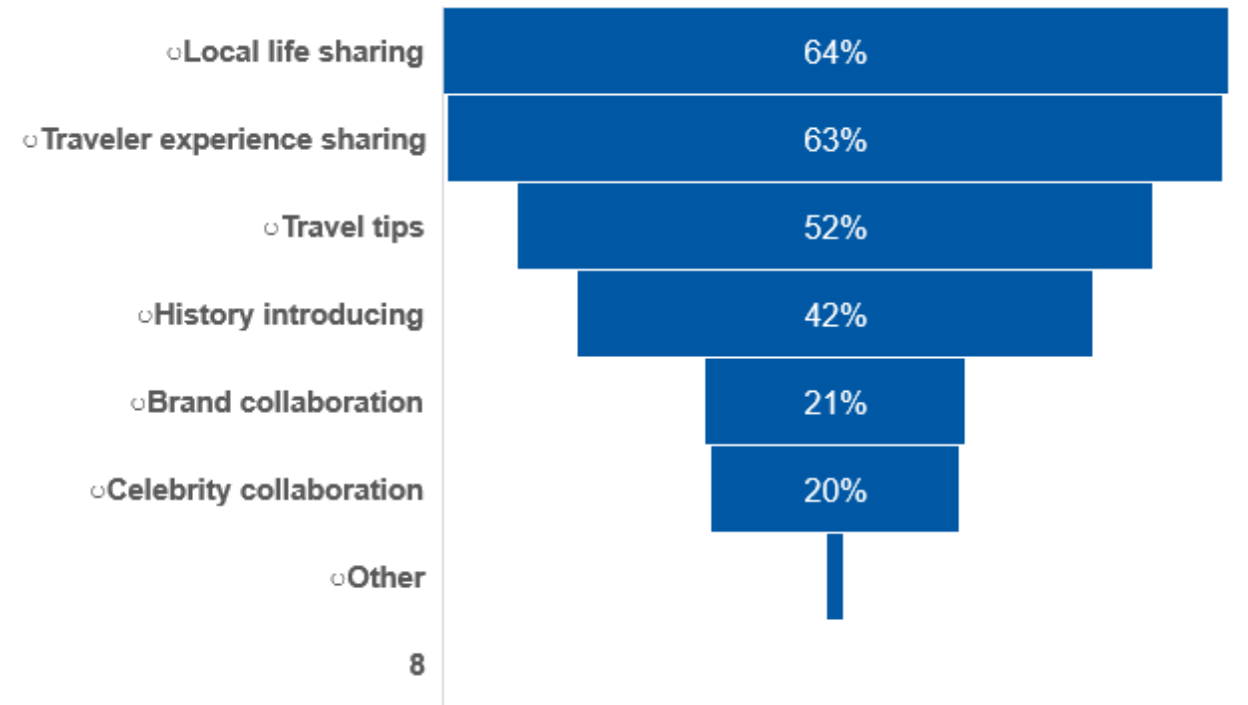
Social media is still the most important channel to gather information for Chinese travelers. Around 66% travelers use social media such as Little Red Book, Tiktok, and Weibo and so on to search about destination. Besides, travel review sites (55%), domestic OTAs (49%) and destination official websites are also reliable channel regarding travel products, trip planning.



Chinese travelers prefer real content to acknowledge the actual situation in the destination and travel trips. Thus they prefer video format or offline VR to better understand. Also, they would like to receive travel tips and local life to know what the journey will be and what kind of culture is waiting for them.



Which format of information do you want to see more of Italy? [Multiple Choice]

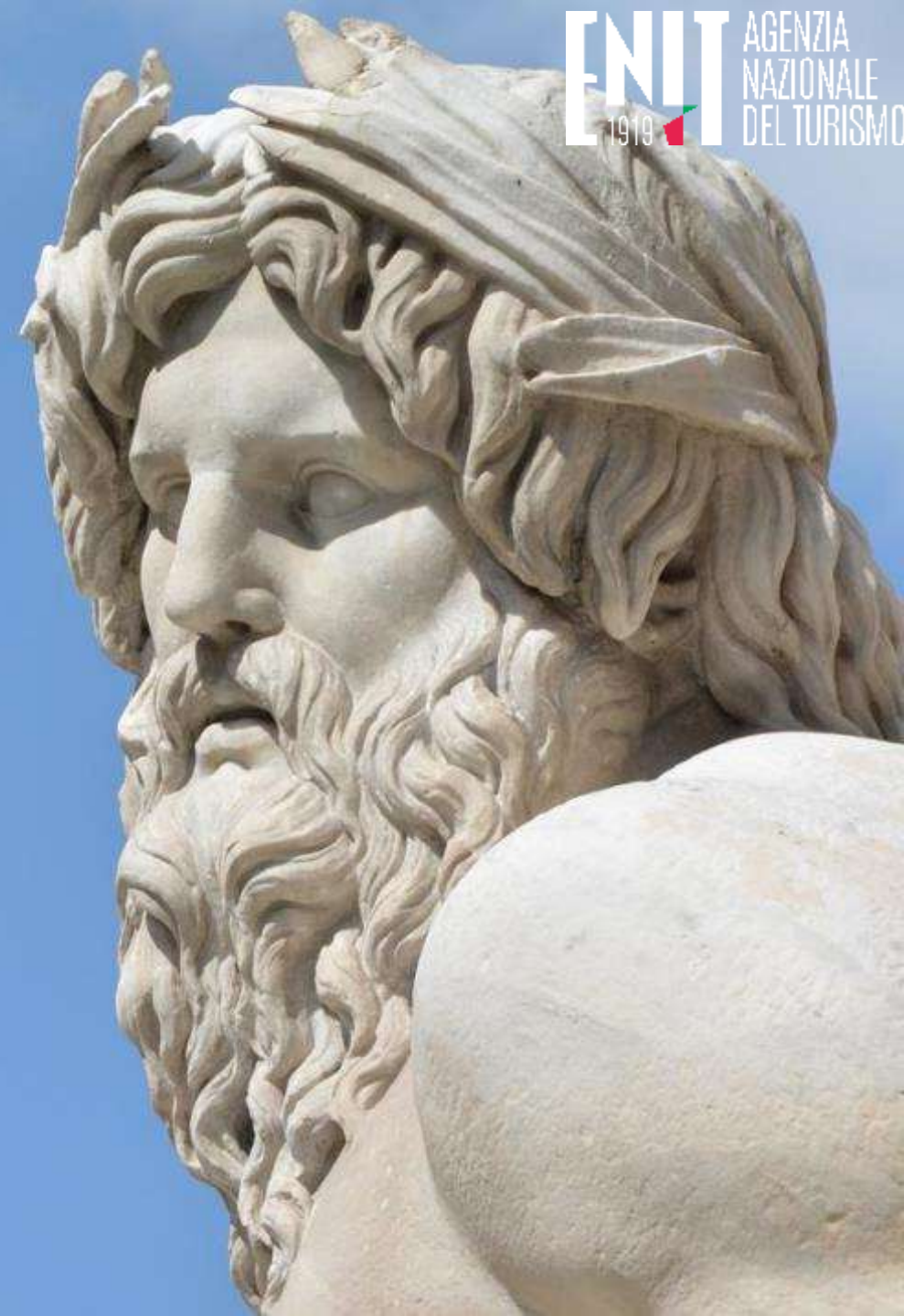


What online marketing content of Italy do you think is most attractive? [Multiple Choice]

Part 6 Traveler behavior

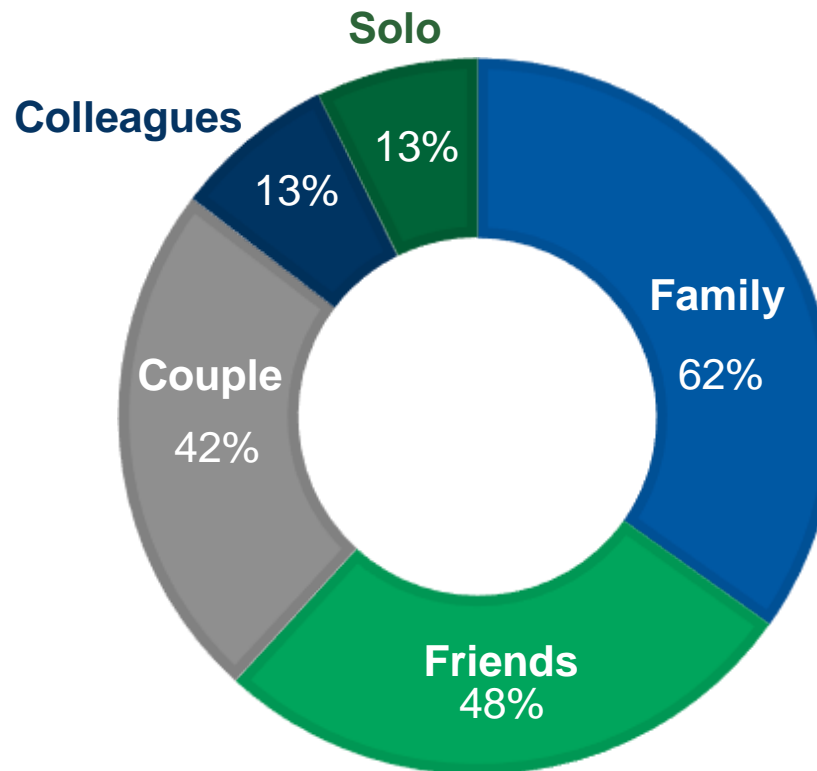
KEY QUESTION:

- *Travel groups*
- *Length of travel, budget*
- *Booking and products*



Nearly two thirds (62%) of survey respondents who plan to travel to Italy want to do so with family – including spouses, children, and/or parents. Travel with friends (48%) and their better half (42%) were also popular choices.

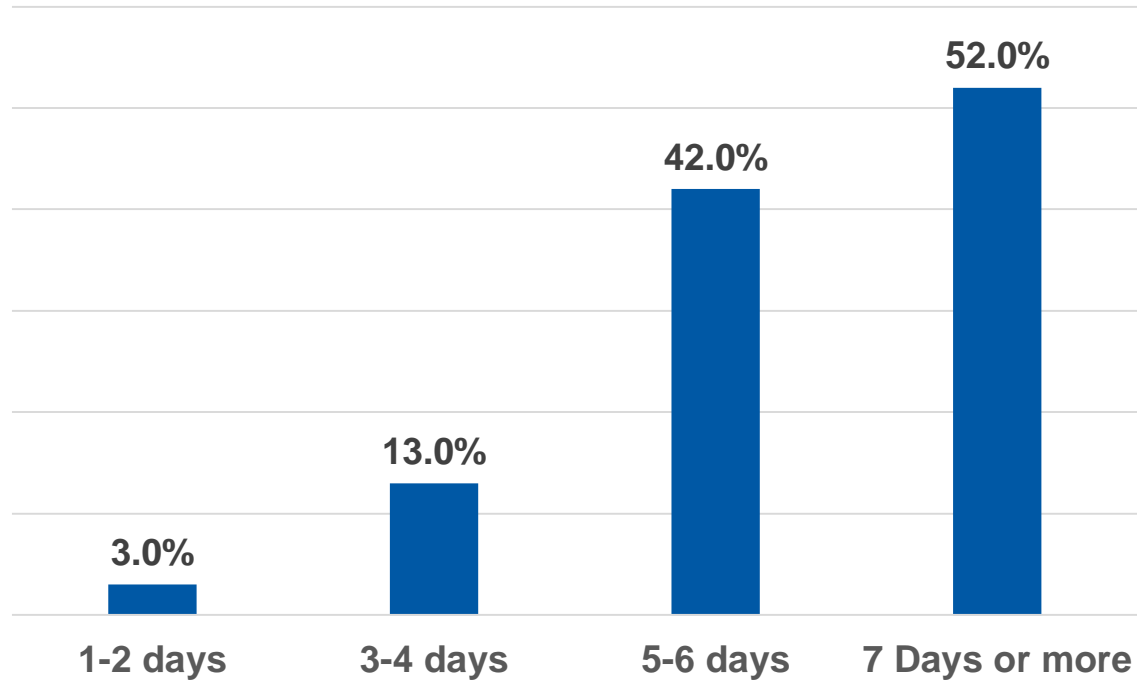
WHO WILL YOU TRAVEL WITH?



What type of holiday do you prefer when traveling to Italy? [Multiple Choice]

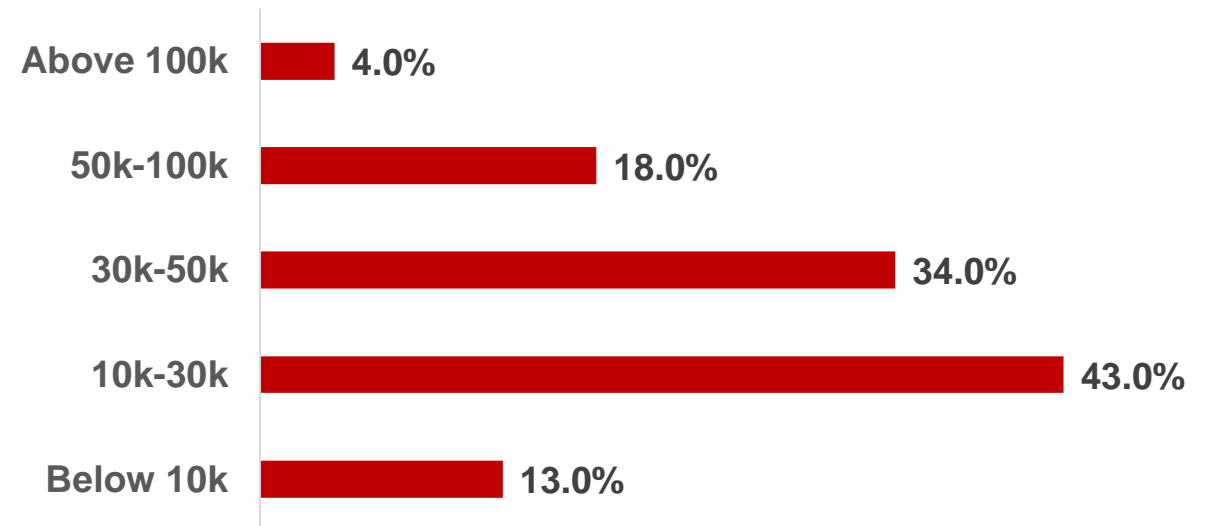
More than half (52%) plan to travel to Italy for at least one week, while 22% say they will allocate a minimum budget (flights excluded) of ¥ CNY 50K (around €6,650), demonstrating that mostly affluent Chinese travelers would visit Italy.

Trip Length



What is the ideal trip length when traveling to Italy? [Multiple Choice]

Trip Budget (YUAN)



How much (in ¥ CNY) would you like to spend when traveling to Italy (flight excluded)?

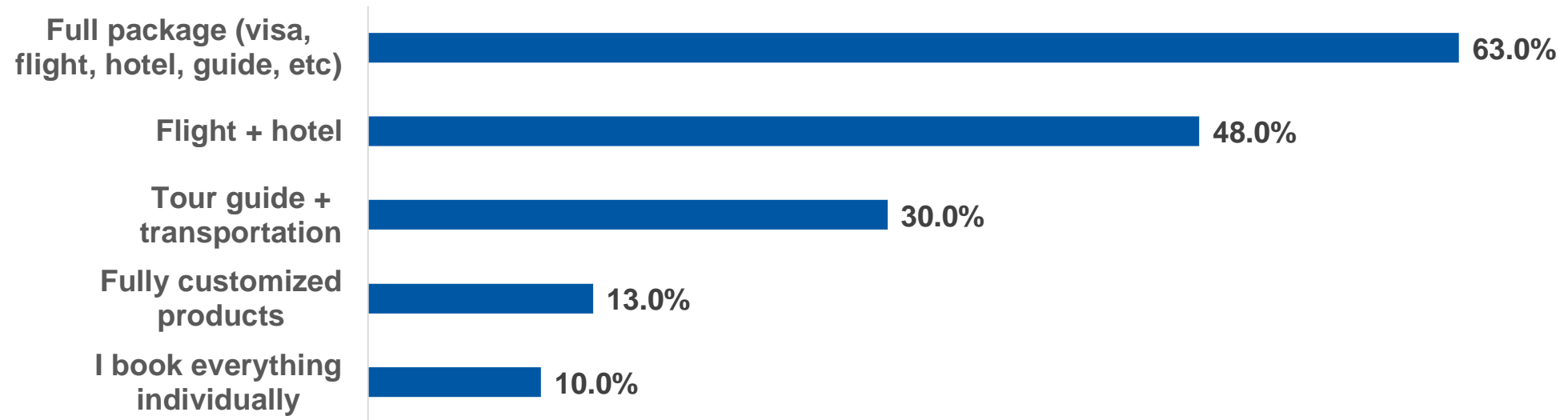
Chinese travelers are most familiar (76%) with using local booking platforms to plan a trip to Italy – platforms like Ctrip offer both reliable information and good deals. Next, international platforms were used by 35% of respondents.

How do you book your trip to Italy?
[Multiple Choice]



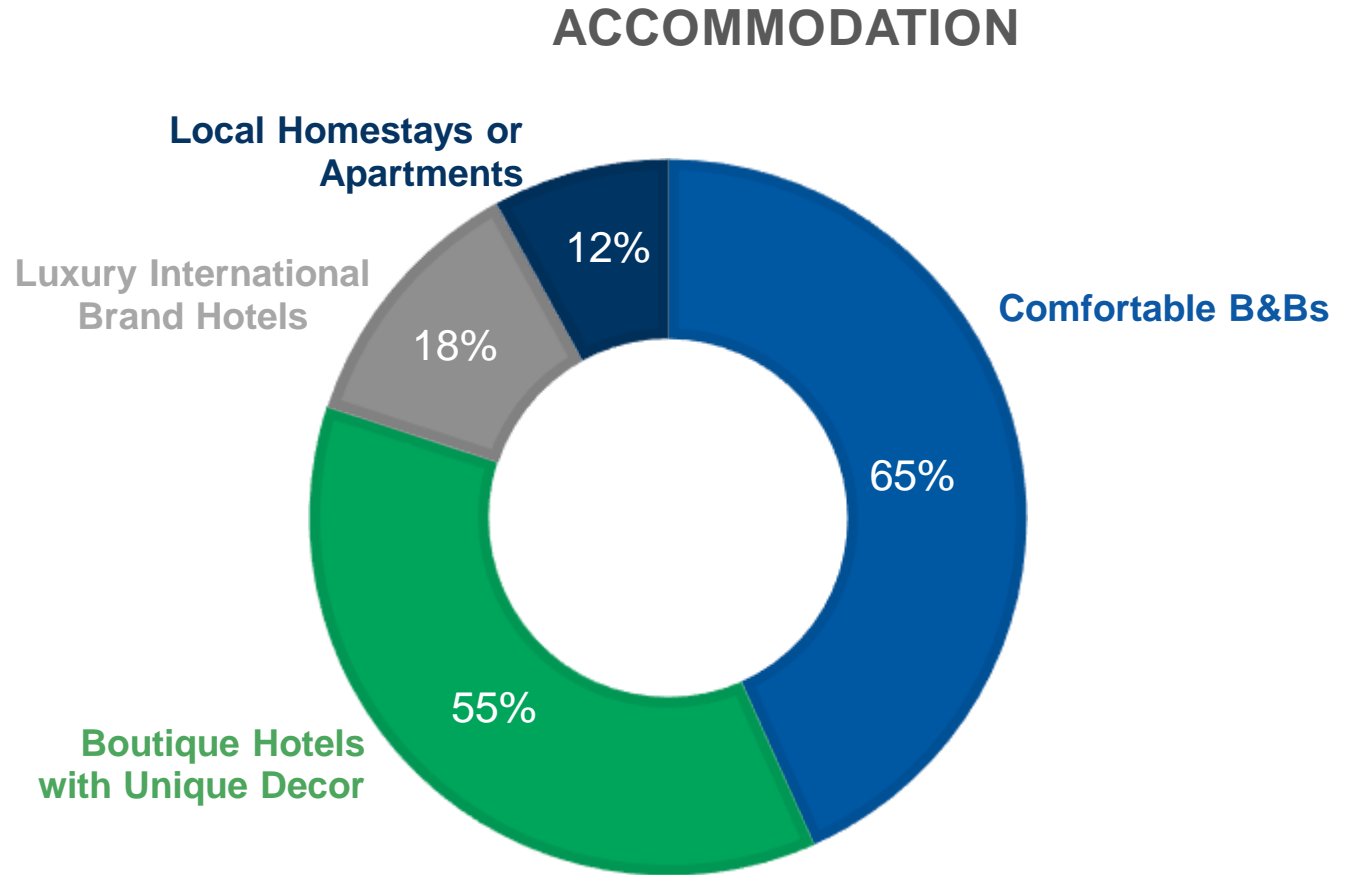
Although full package trips where everything is included is the top choice for two thirds of respondents, there is also a good percentage that only book parts of the trip in advance, leaving room for unplanned activities and last minute bookings.

Preferred Travel Product



What type of travel product would you book before traveling? [Multiple Choice]

Bed and Breakfast (65%) and Boutique Hotels (55%) are the most popular choices for accommodation, followed by international luxury hotels, and local homestays with a much lower percentage.



What type of accommodation do you prefer when traveling to Italy? [Multiple Choice]

Thank you !

