

中国出境旅游市场分析

——市场结构与趋势

China Outbound Tourism Analysis

----Market Structure and Trend

王新军 博士

Xinjun WANG Ph.D

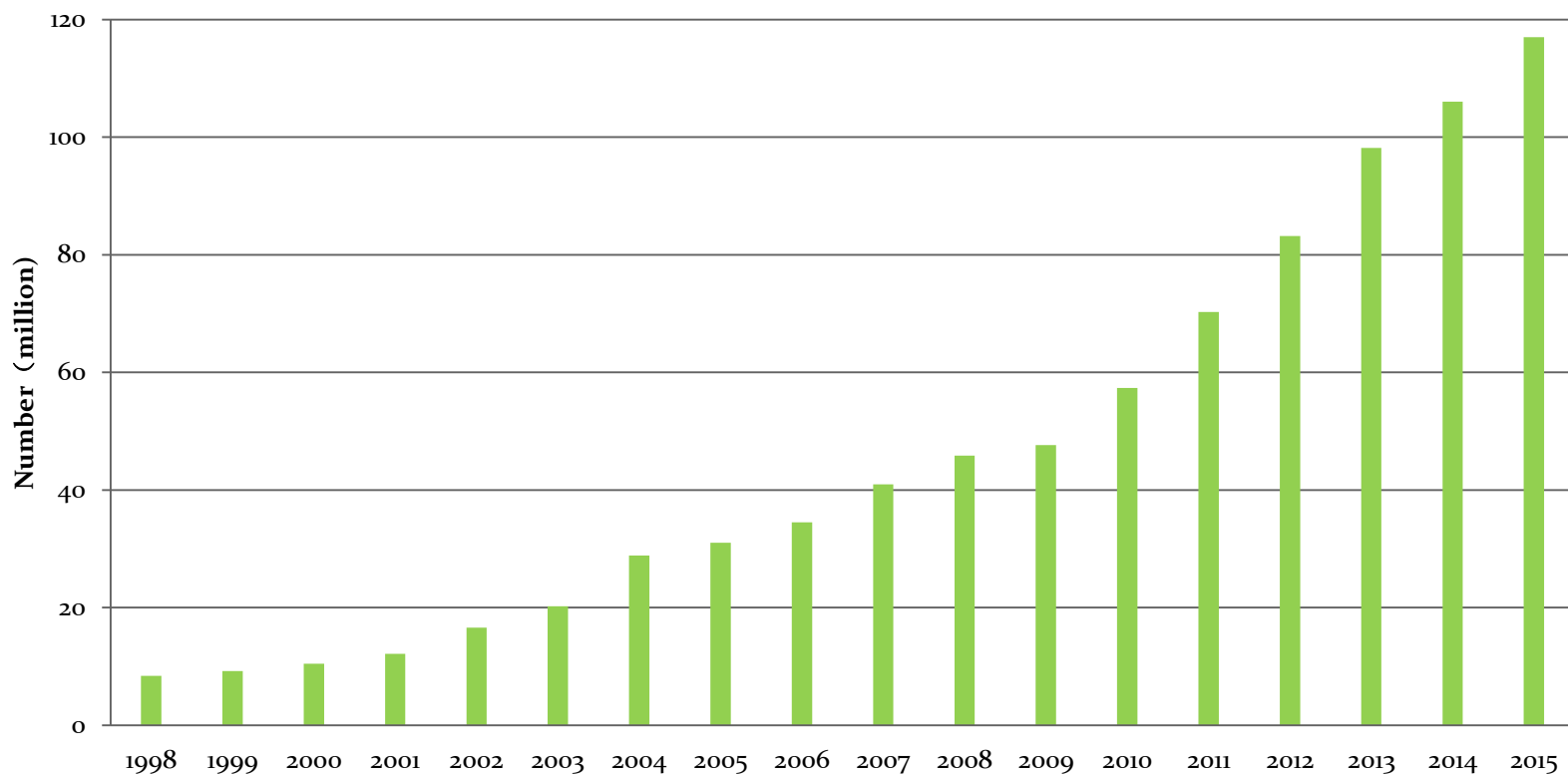
艾威联合旅游顾问机构

CEO/Ivy Alliance Tourism Consulting

Nov.03, 2016 Beijing

中国出境旅行市场发展

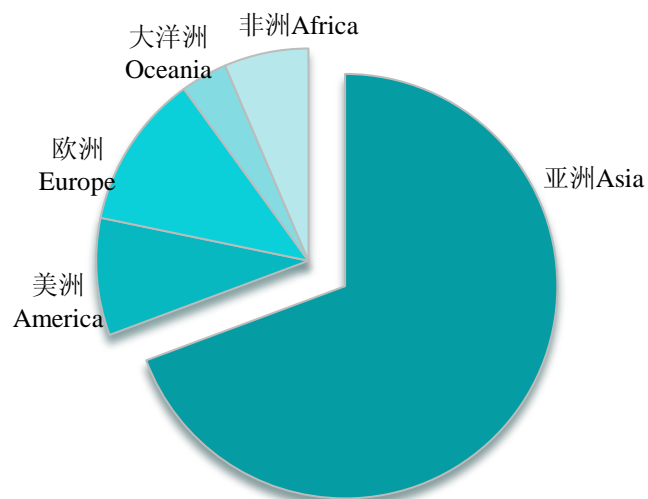
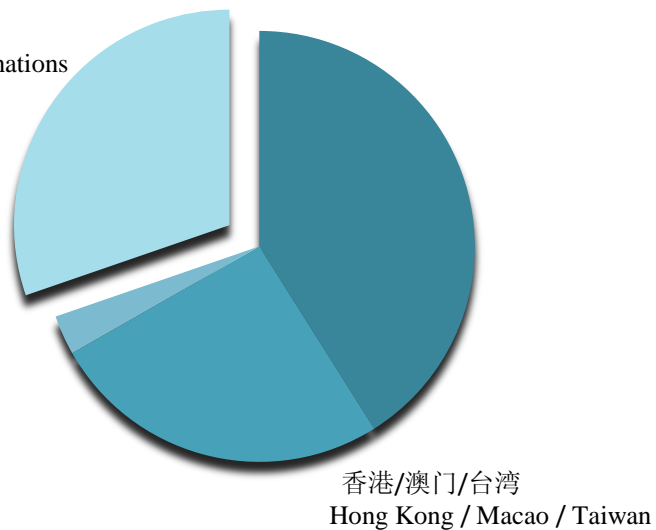
Chinese Outbound Travel – Booming Market



中国公民出境客流结构

Structure of Chinese Outbound Traveler Flow

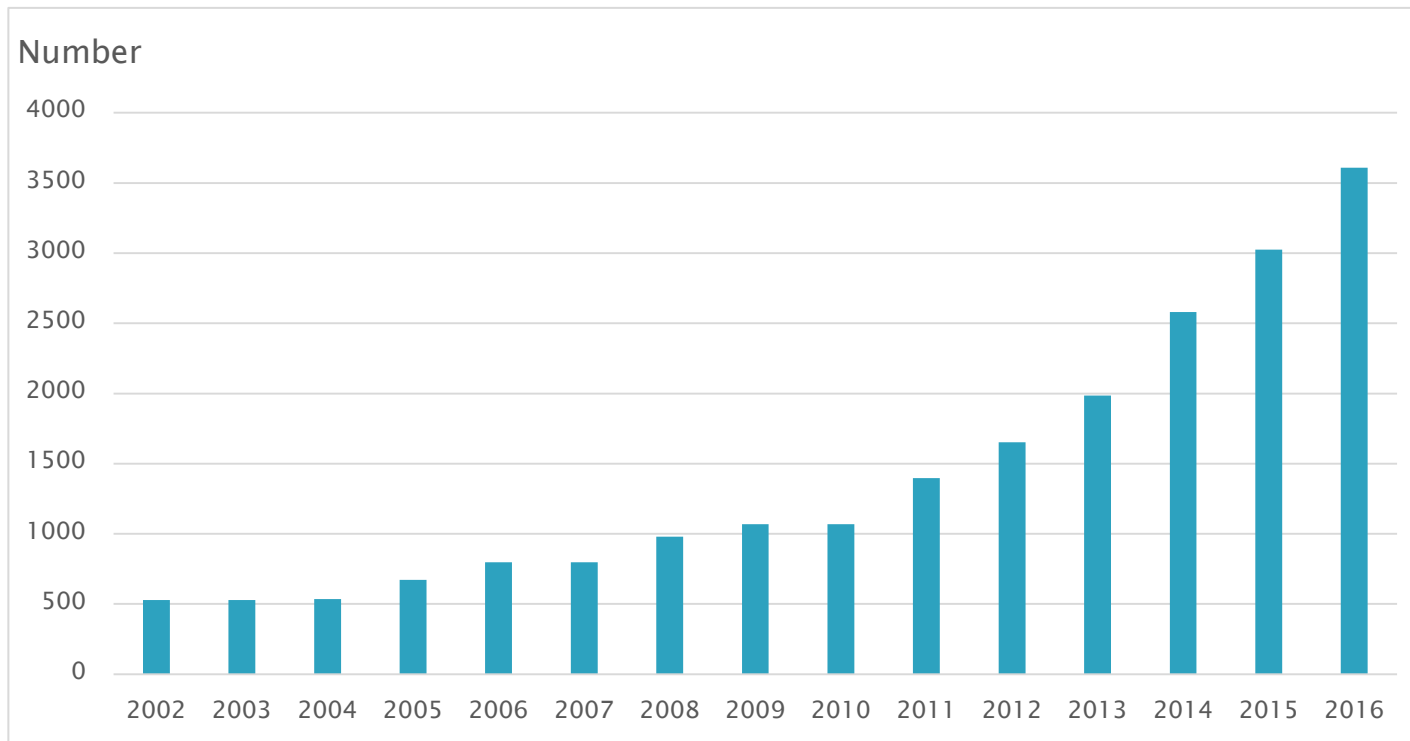
第三国目的地
The Third Destinations



(Note: Excluding the number of Chinese travelers to Hong Kong, Macao & Taiwan).

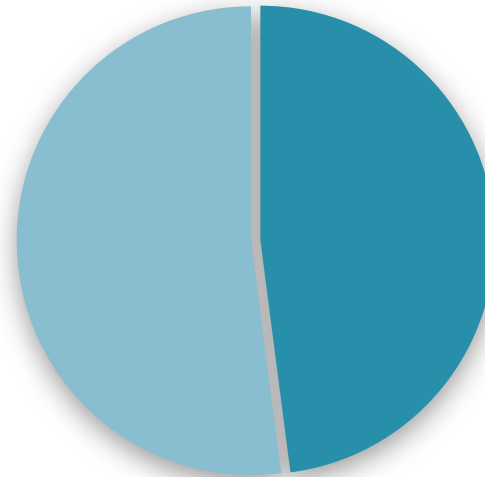
经营出境旅游旅行社数量

The Number of China Outbound Travel Agencies



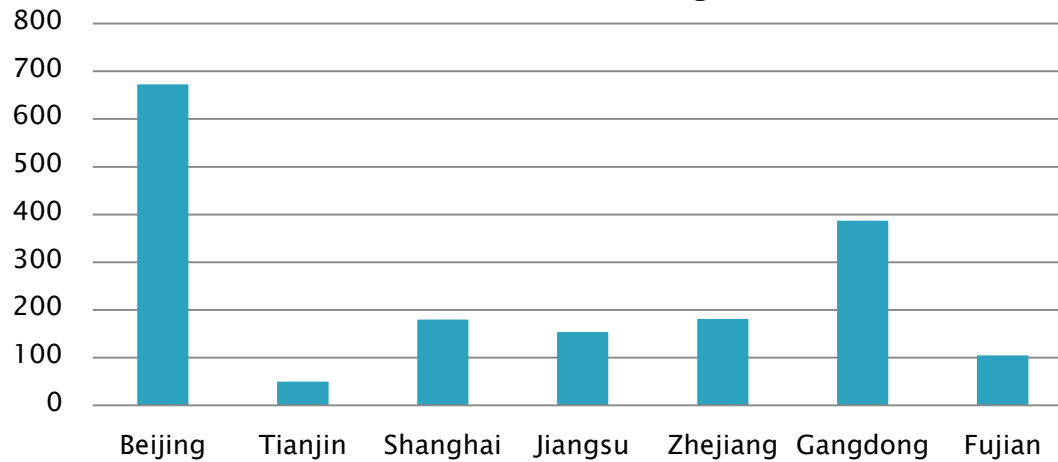
一线客源地市场

The First-tier Tourist Generating Regions



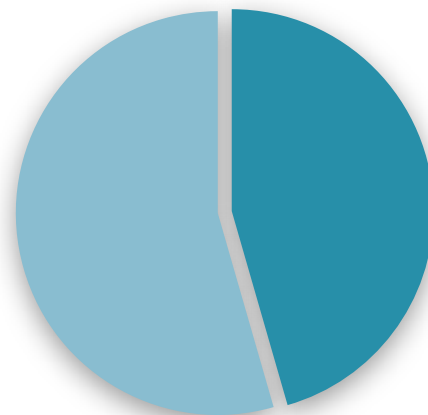
■ The First-tier Tourist Generating Regions

The number of outbound travel agencies



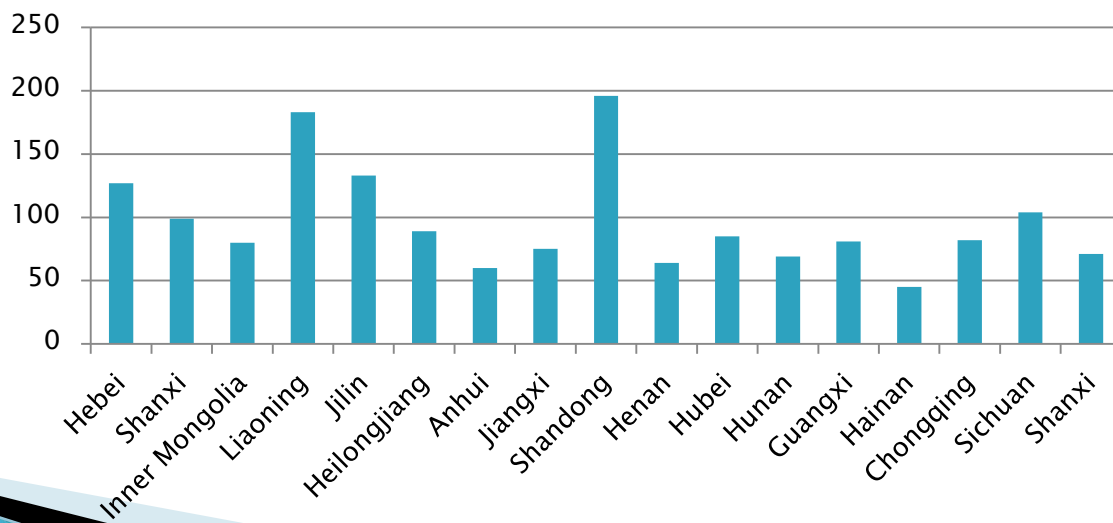
二线客源地市场

The Second-tier Tourist Generating Regions



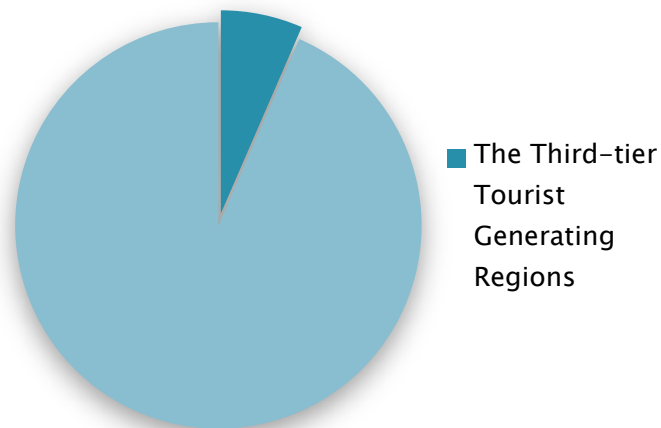
■ The Second-tier Tourist Generating Regions

The number of outbound travel agencies

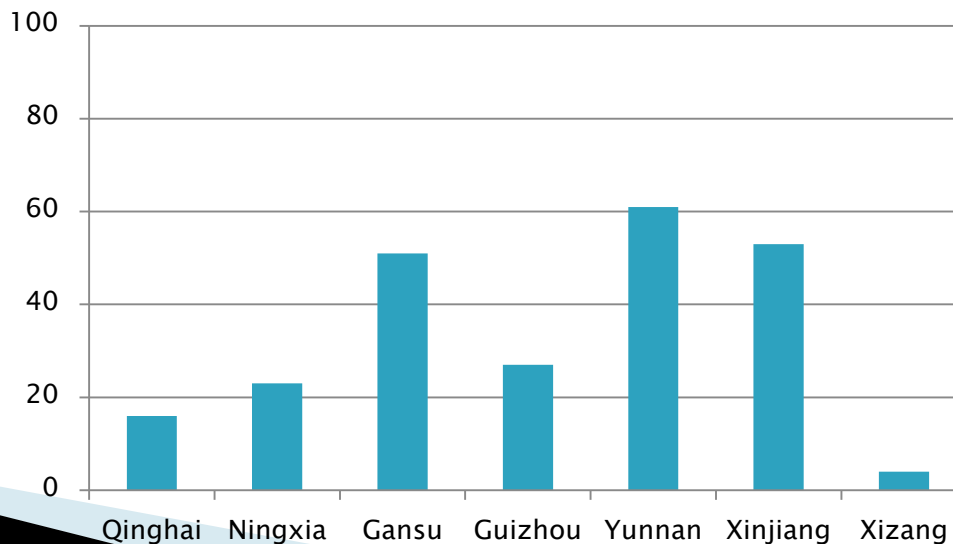


三线客源地市场

The Third-tier Tourist Generating Regions



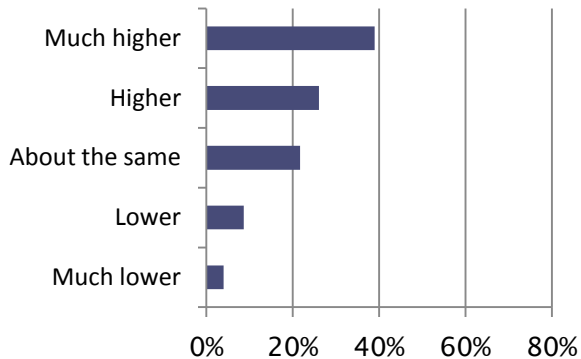
The number of outbound travel agencies



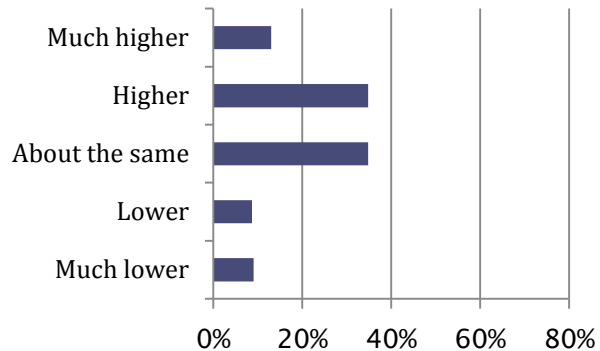
旅行社2016年第一季度出境旅游业务情况

Business Situation by Tour Operators 2016Q1

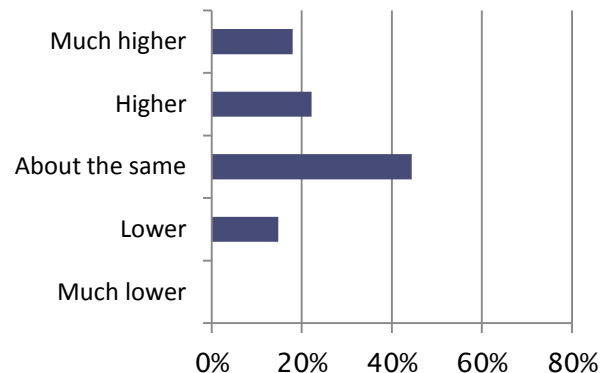
亚洲游市场
Asia



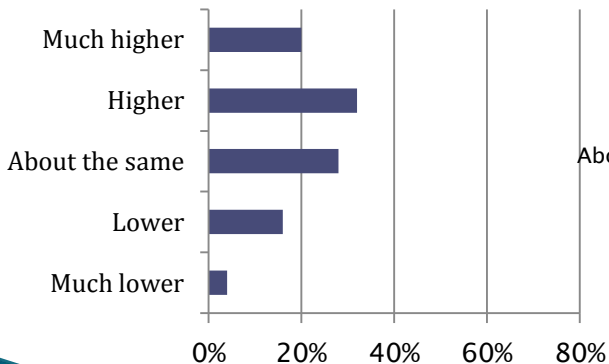
欧洲游市场
Europe



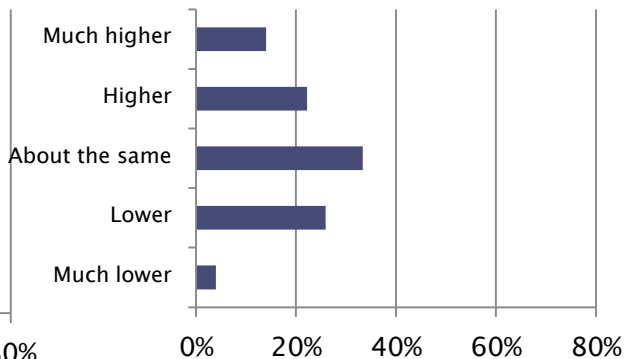
美洲游市场
America



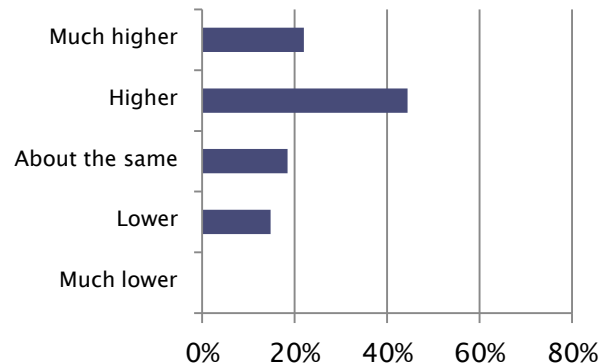
大洋洲游市场
Oceania



非洲游市场
Africa



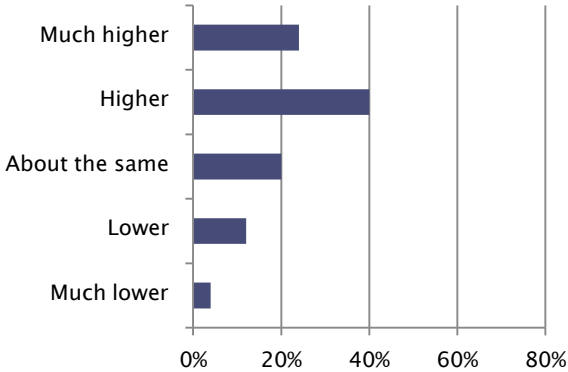
海岛游市场
Sea Island



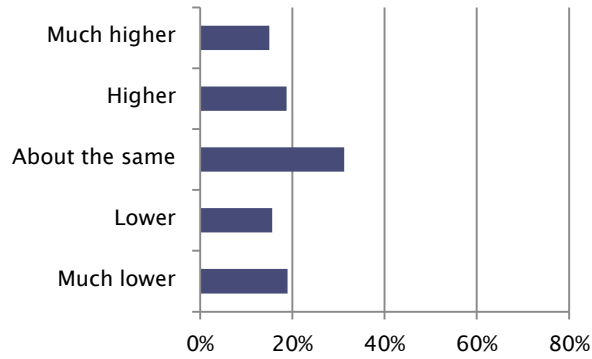
旅行社2016年第二季度出境旅游业务情况

Business Situation by Tour Operators 2016Q2

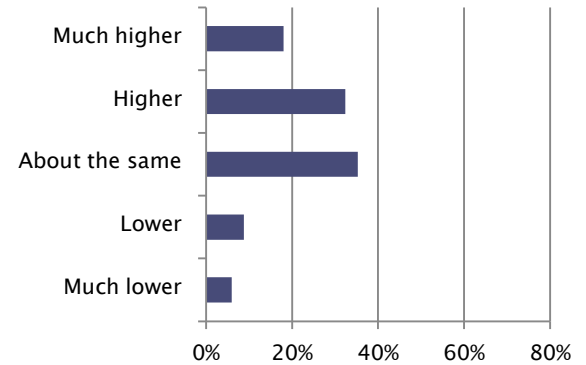
亚洲游市场
Asia



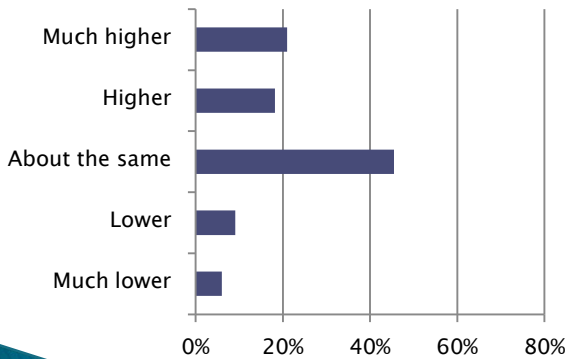
欧洲游市场
Europe



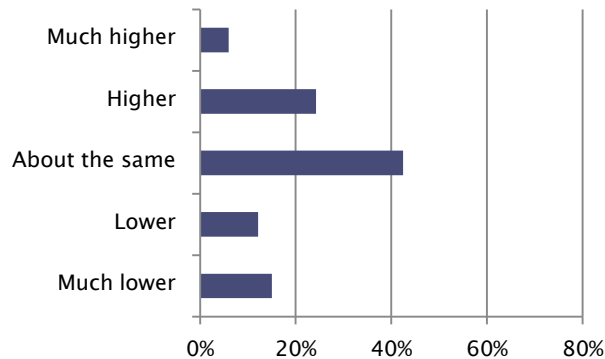
美洲游市场
America



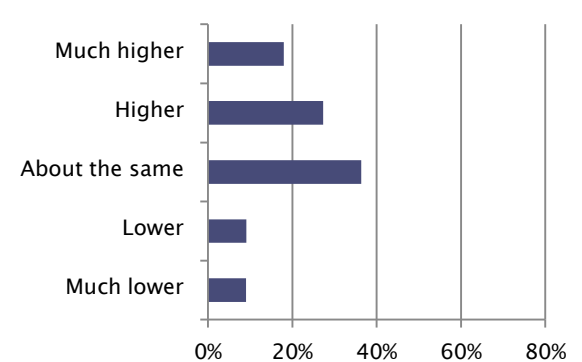
大洋洲游市场
Oceania



非洲游市场
Africa



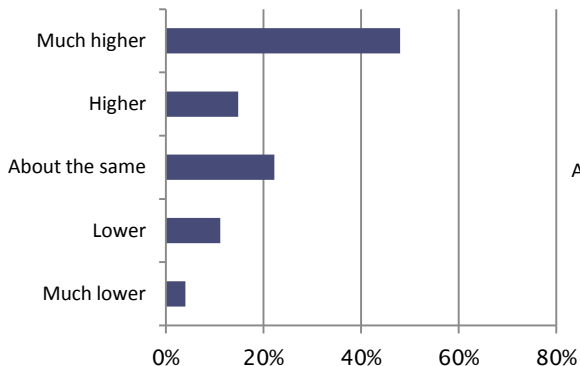
海岛游市场
Sea Island



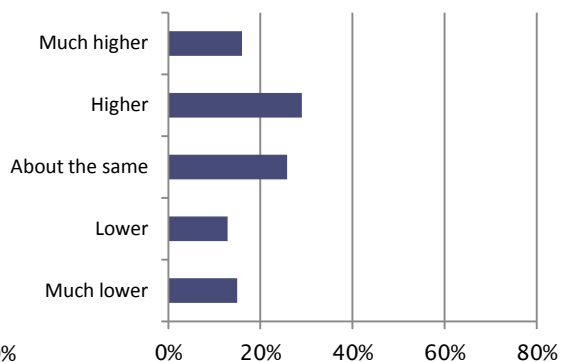
旅行社2016年第三季度出境旅游业务情况

Business Situation by Tour Operators 2016Q3

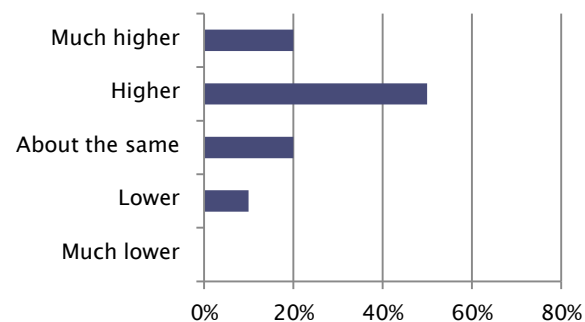
亚洲游市场
Asia



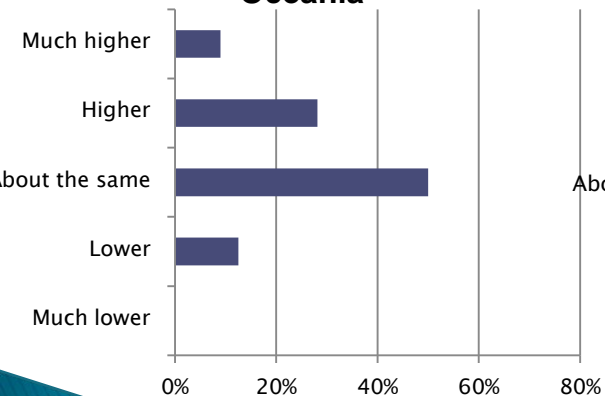
欧洲游市场
Europe



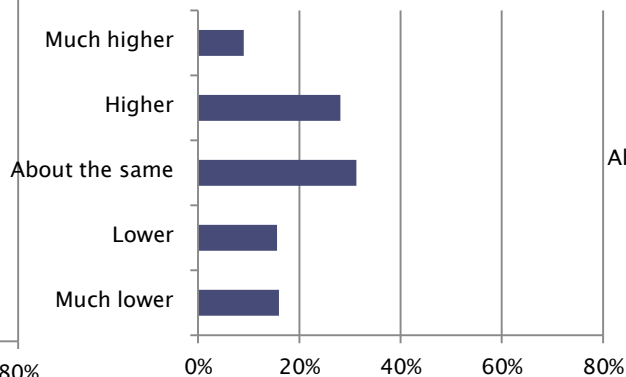
美洲游市场
America



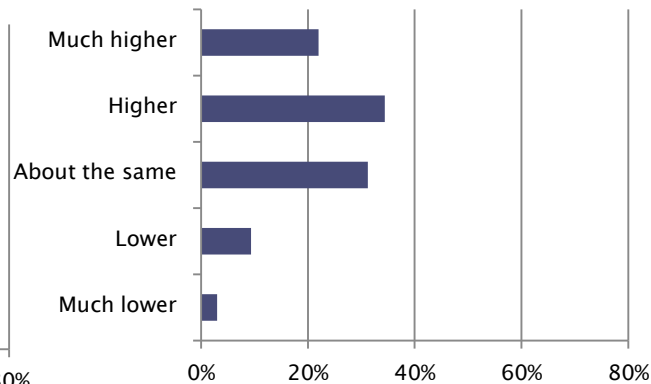
大洋洲游市场
Oceania



非洲游市场
Africa

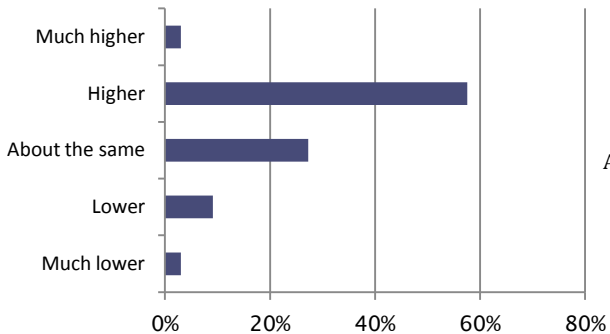


海岛游市场
Sea Island

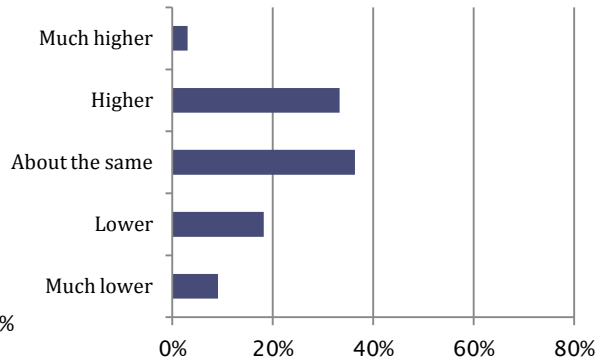


旅行社2016年第四季度市场预期 Market Forecast by Tour Operators 2016Q4

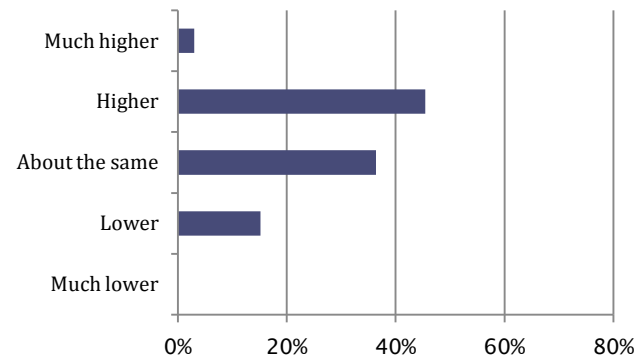
亚洲游市场
Asia



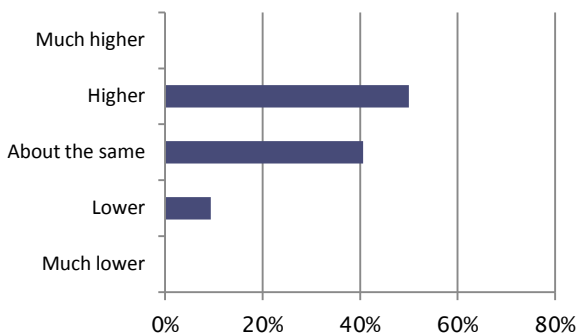
欧洲游市场
Europe



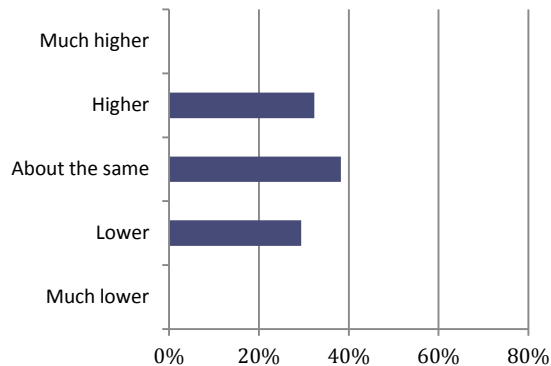
美洲游市场
America



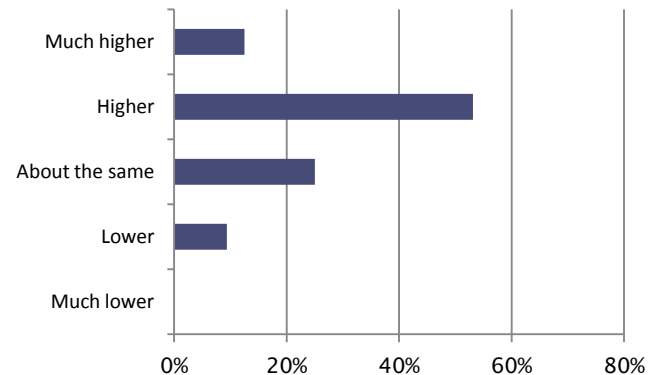
大洋洲游市场
Oceania



非洲游市场
Africa



海岛游市场
Sea Island



出境旅游价格指数（OPI）

CHINA OUTBOUND-TOURISM PRICE INDEX

支持机构  中国旅行社协会

出境旅游价格指数报告

CHINA OUTBOUND-TOURISM PRICE INDEX

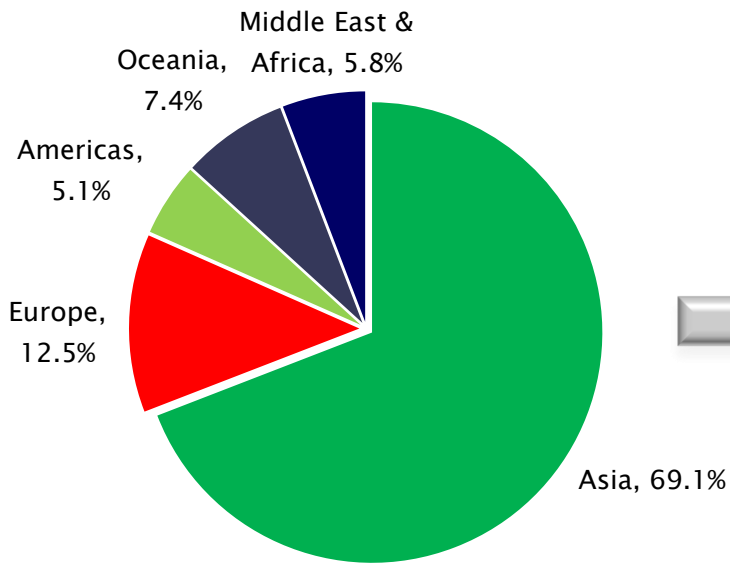
2016年10月



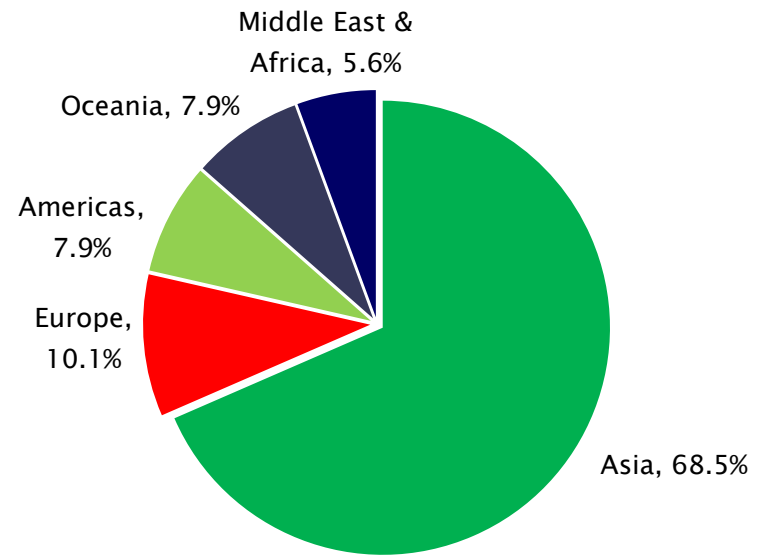
- 出境旅游价格综合指数（OPI）是反映中国公民赴全球各目的地旅游产品及其价格变化的指标体系。
- 通过对全国主要客源城市的众多有代表性的出境旅游运营商及其旅游产品进行月度检测，以大数据采集和分析为基础，按照出境旅游客流的目的地空间流向、产品类型和客源地进行分类比较研究，通过研发和设计反映市场变化的数学模型，以抽象化的指数系统反映出境旅游市场价格的总体情况。
- OPI指数的发布对适时了解和把握出境旅游市场总体情况和产品价格结构具有重要意义。

出境旅游产品数量结构

Outbound Tourism Product Structure



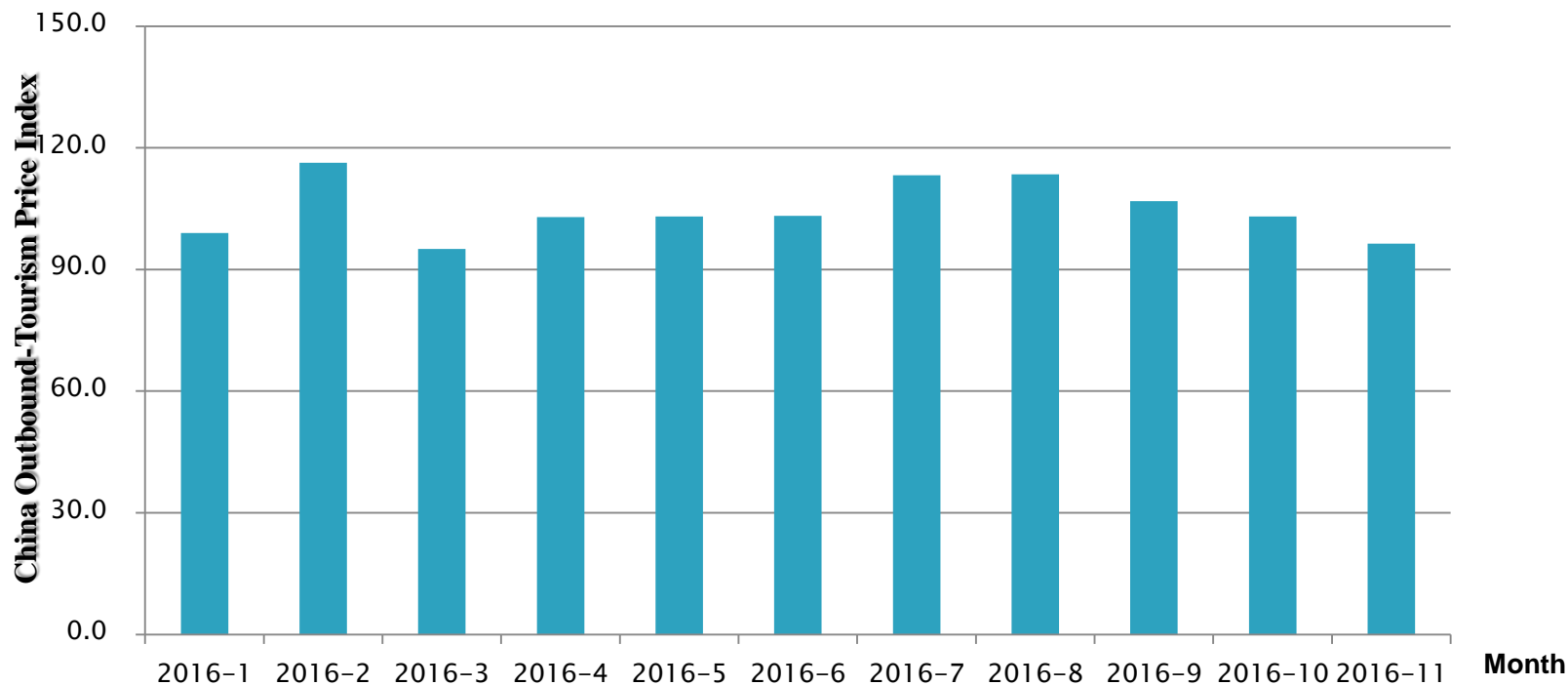
2016年8月



2016年11月

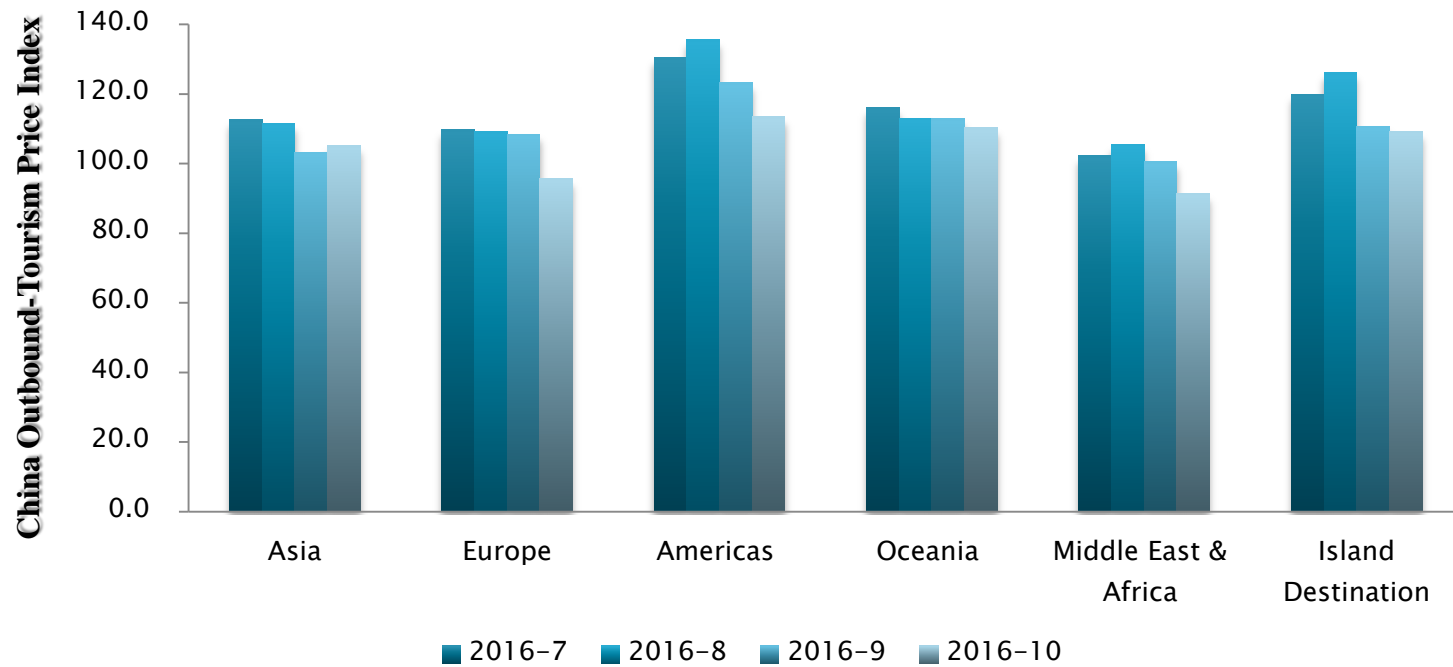
2016年1-11月出境旅游价格指数

China Outbound-Tourism Price Index (Jan. 2016-Nov. 2016)

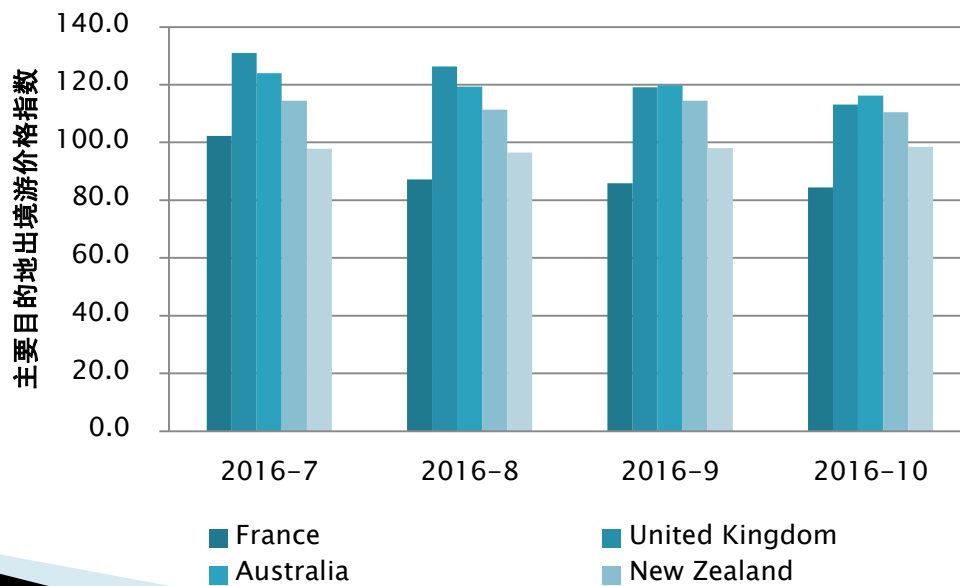
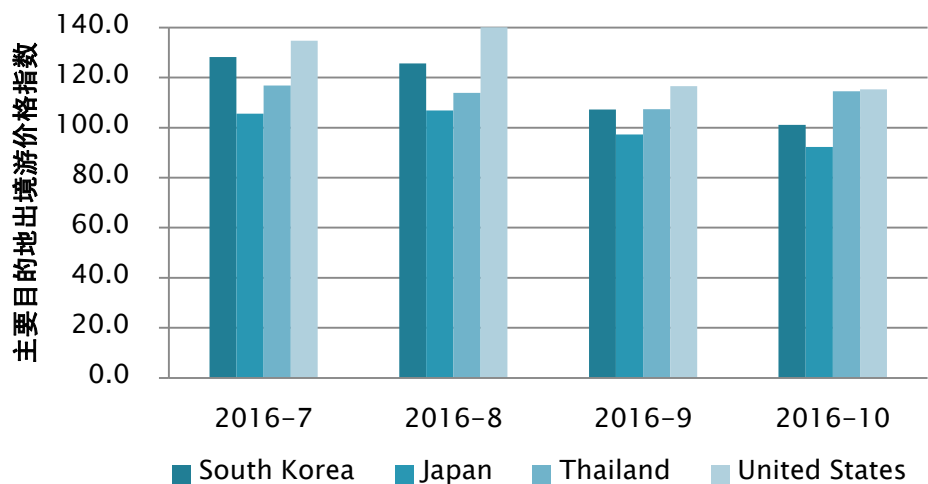


各大洲及海岛出境旅游价格指数

China Outbound-Tourism Price Index by Regions

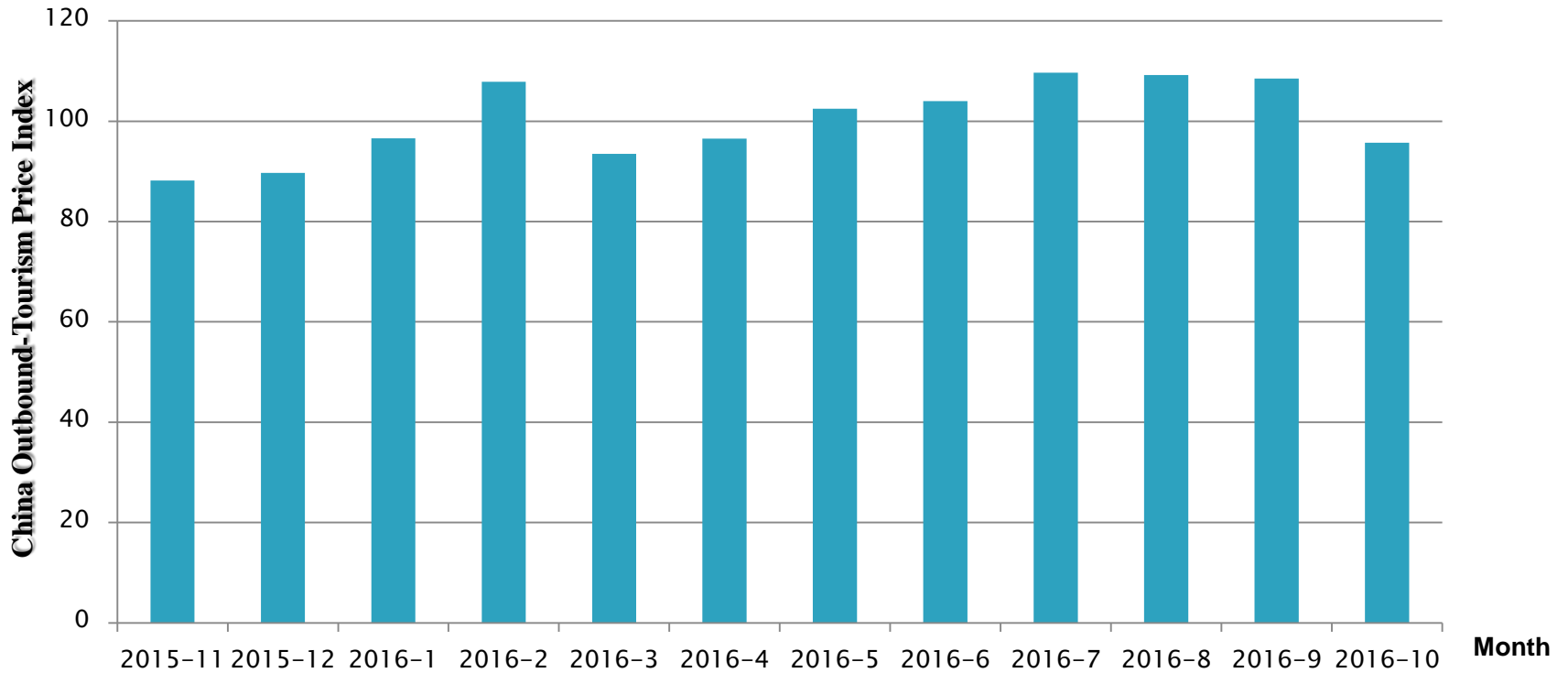


主要目的地出境旅游价格指数 China Outbound Travel Price Index of Main Destination



中国出境旅游价格指数(欧洲目的地)

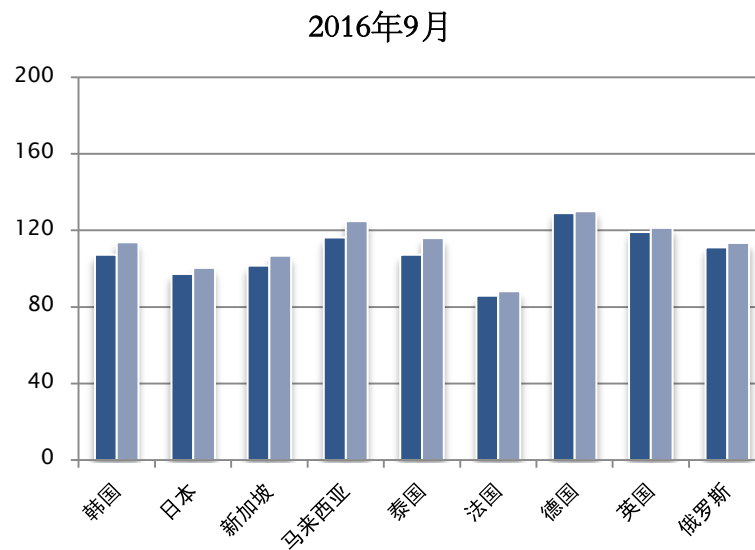
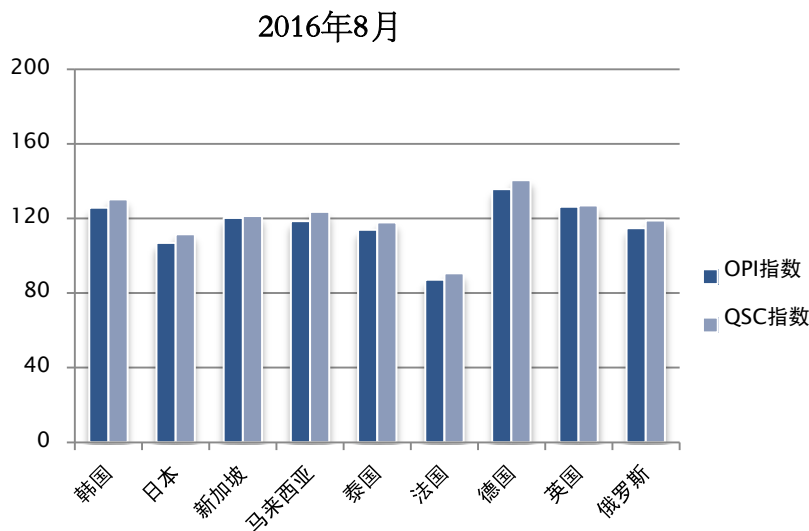
China Outbound Travel Price Index by Europe Destination



QSC优质出境旅游指数

QSC Outbound-Tourism Price Index

- 出境旅游价格综合指数（OPI）的升级；
Upgrade and Enrichment of OPI System
- 基于优质出境旅游产品的指标体系，面向旅游业界和旅游者发布。
An index system based on quality tourism products and released monthly to travel trade and tourists



转型中的中国出境旅游市场

China Outbound Tourism in Transformation

- ▶ 出境客流量继续增加,二线客源地区的增长潜力大;
Outbound Tourist continues to increase. The second-tier tourist generating regions have great potential to grow.
- ▶ 游客需求多元化、个性化和碎片化;
Tourists demands are increasingly diversified, personalized and fragmented.
- ▶ 出境旅游运营商和境外供应商的业务定位出现分化,优质供应商将越发受到买家和旅游者的关注和认可;
Quality tourism suppliers will be more and more welcomed and recognized by Chinese buyers and tourists.
- ▶ 中国游客境外消费继续增长,但开始趋于理性和实用;
Chinese outbound tourists spending overseas continues to grow, but will become rational.
- ▶ 自由行市场发展迅速,将从近程周边目的地扩展到中远程目的地;
The rapid development of FIT market has expanded from the short-haul neighboring destinations to mid/long-haul destinations;
- ▶ OTA快速发展,出境旅游业态呈现多元化。
OTAs develop fast. Outbound travel industry has growing trend of diversification.

中国出境旅游年报 CHINA OUTBOUND TOURISM YEARBOOK 2014-2015

中国旅行社协会
艾威联合旅游顾问有限公司



More Information: ivy@outbound-tourism.cn

出境旅游优质服务供应商计划 (QSC Program) China Outbound Tourism Quality Service Certification Program

Chinese tourism industry's most recognized quality certification on outbound tourism services.

- Non-profit Program Promoting Tourism Service Quality
- Authoritative Certification China Outbound Tourism Industry
- Win the Trust of Chinese Travelers and Buyers
- Highway to China Tourism Market



Supported by



World Tourism Cities
Federation



United Nations World
Tourism Organization



China Association of
Travel Services



Pacific Asia Travel
Association



World Federation of
Chinese Catering
Industry



Skal International

Supporting & Cooperated Organization



More...

工作目标Objectives

1. **Recognize overseas tourism suppliers, who can provide quality services according to QSC Criteria, and promote to Chinese travelers and travel agencies;**
2. **Help Chinese travelers to attain a trusted, comfortable and quality travel experience;**
3. **Help Chinese tour operators and travel agencies to provide high quality, diversified and personalized tourism products.**

中国旅游行业权威认证

APPROVED BY QUALITY SERVICE CERTIFICATION
CRITERIA OF CHINA OUTBOUND TOURISM



Benefits



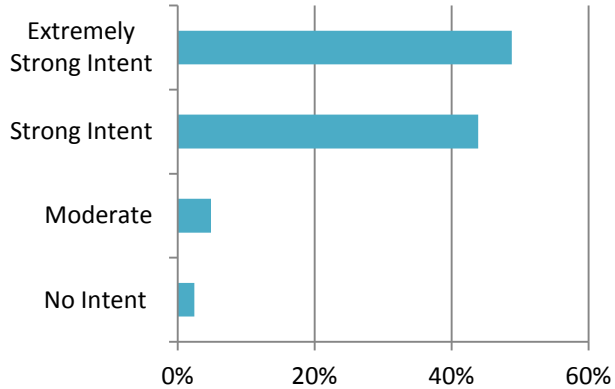
Media Reports on QSC Program



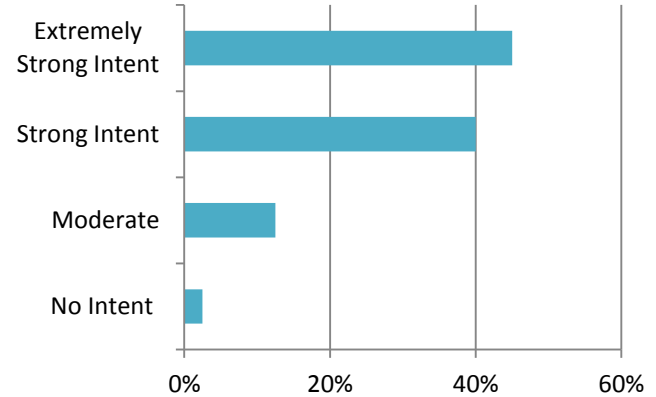
旅行社与QSC优质供应商的合作意愿

Cooperation Intent of Tour Operators with QSC Quality Suppliers

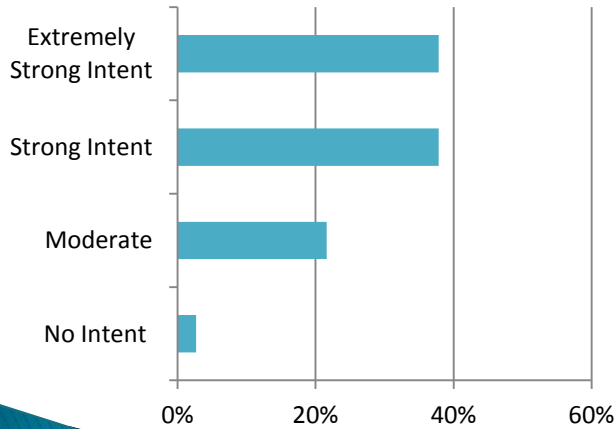
地接旅行社类供应商
Travel Service-type Suppliers



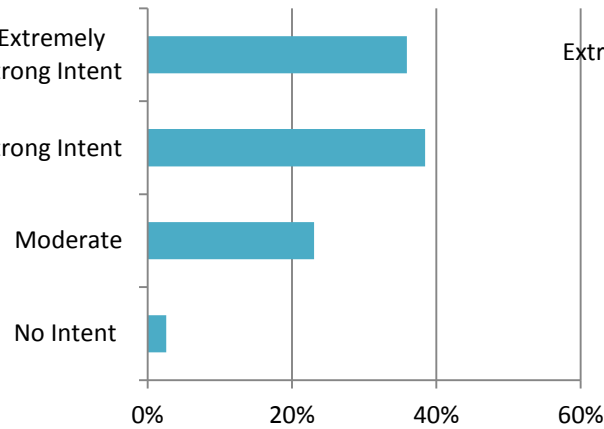
酒店住宿类供应商
Hotel Accommodation-type Suppliers



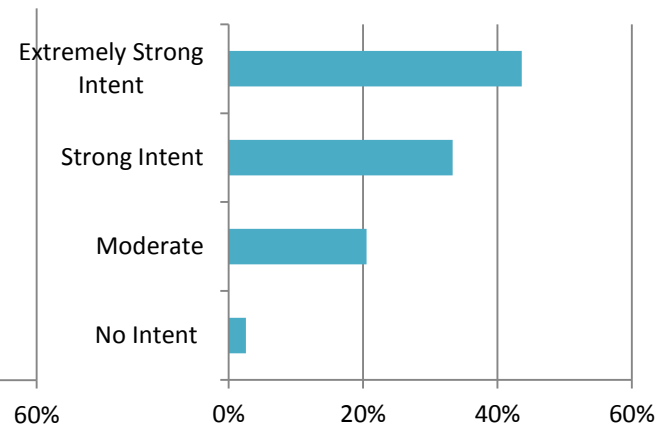
购物商店类供应商
Shopping Store-type Suppliers



餐饮服务类供应商
Restaurant-type Suppliers



旅游吸引物类供应商
Tourist Attraction-type Suppliers



Highlights

Who can join QSC	Recommendation Letter	Services
<ul style="list-style-type: none">• Travel Agencies• Hotels & Accommodations• Shopping Stores• Tourist Attractions• Restaurants & Catering Services• Transportation Services• Travel Financial Services• Other Suppliers with multiple service types	<ul style="list-style-type: none">• Regional / city level (Convention &) Visitors Bureau• QSC cooperated Chinese outbound tour operators• Other cooperated organizations of QSC Program	<ul style="list-style-type: none">• Start from Registration online or submit Registration Form• Assessments can be done in about 2 weeks after the complete submission of application materials• QSC Certification : Free of Charge• QSC value-added promotion services : Optional, only if needed by applicants.



出境旅游优质服务供应商计划执行机构
Executing Organization of QSC Program
Tel: +86-10-62279624, 63486575
Fax: +86-10-62279624, 62237479
Email: certification@qualitytourism.cn
Official Website: www.qualitytourism.cn



Since 2003

中国出境旅游国际论坛

International Forum on Chinese Outbound Tourism

中国出境旅游
Chinese Outbound Tourism
北京国际旅游博览会 2011年6月15-17日
June 15, 2011 • INTERCONTINENTAL Beijing Beichen
多样化需求与品质旅游
Diversified Demands and Quality Tourism



中国出境旅游国际论坛

Introduction of International Forum on Chinese Outbound Tourism

International Forum on Chinese Outbound Tourism (IFCOT) is a high-end travel industry summit supported by China National Tourism Administration, China Tourism Association, China Association of Travel Services, World Tourism Organization and Pacific Asia Travel Association. First launched in 2003, IFCOT has been successfully held for over 10 times with a total of more than 4,000 participants, including industry elites, senior officials of destinations tourism departments, experts and media that come from over 50 countries. As a professional, high-standard and authoritative event, IFCOT is highly recognized by Chinese outbound travel trade and has attracted a great deal of media spotlight. IFCOT has significant impact on the Chinese outbound travel industry.



Mr. Du Jiang, Vice
Chairman of CNTA
IFCOT 2003/2010



Mr. Xu Jing, Regional
Representative for Asia
and the Pacific, UNWTO
IFCOT 2003



Ms. Phomsiri Manoham
Governor, Tourism
Authority of Thailand
IFCOT 2008



Dato' Sri Dr. Ng Yen Yen,
Minister of Tourism Malaysia
IFCOT 2009



Mr. Murat Salim Esenli,
Turkish Ambassador
IFCOT 2013



Ambassador of Malaysia
Welcome Speech
IFCOT 2012



Hon. Obediah Hercules
Wilchcombe, Minister of
Bahamas Ministry of Tourism
Welcome Speech
IFCOT 2014



Approaching
Asia-Pacific
IFCOT 2008



Chinese Short-haul and
Medium-haul Outbound Tour
IFCOT 2010



Tourism boards officials, industry
elites, professionals and media
attending IFCOT

专业交流和推广平台

Professional Platform for Promotion and High-end Networking

First launched in 2003, IFCOT has been successfully held for over 10 times. Many organizations including different overseas tourism boards made excellent promotion through IFCOT platform.

Destination Theme Sessions



Approaching Destination –
Focus on Thailand



North America Tourism:
Opportunities, Trends and
Challenges



Approaching Destination –
Focus on Guam



Approaching Destination –
New Island Destination and
Bahamas



Destination Theme Session –
Samoa Tourism and Holiday
Products



Destination Theme Session –
Vanuatu Tourism and Holiday
Products

Theme Luncheon & Awards Ceremony



Malaysia Theme Luncheon



Guam Night & Awards
Ceremony



Turkey Theme
Luncheon



China Comfort Travel
Welcome Luncheon



China Comfort Travel
Signing Ceremony with IFC
of World Bank Group



IFCOT Awards Ceremony

IFCOT consolidates abundant industry resources and has earned its reputation as:

- Wind vane of the Chinese outbound travel industry;
- The most valuable B2B business promotion and marketing platform;
- Best occasion of high-end networking with Chinese government officials and business leaders.

一对一业务洽谈

One to One Business Exchange



One on One Business Exchange between Exhibitors and Local Buyers



Business Exchange between Foreign Tourism Bureau Rep. and Top Chinese Tour Operators



Bahamas Tourism Supplier Business Exchange with Chinese Travel Agencies



One on One Business Exchange between Vanuatu Tourism Office Delegates and Chinese Travel Trade



Business Networking during Coffee Break



Business Exchange during Coffee Break between Exhibitors and Local Buyers



One on One Business Exchange between Samoa Tourism Authority Delegates and Chinese Travel Agencies



One on One Business Exchange between Foreign Destination Tourism Supplier and Chinese Travel Agencies



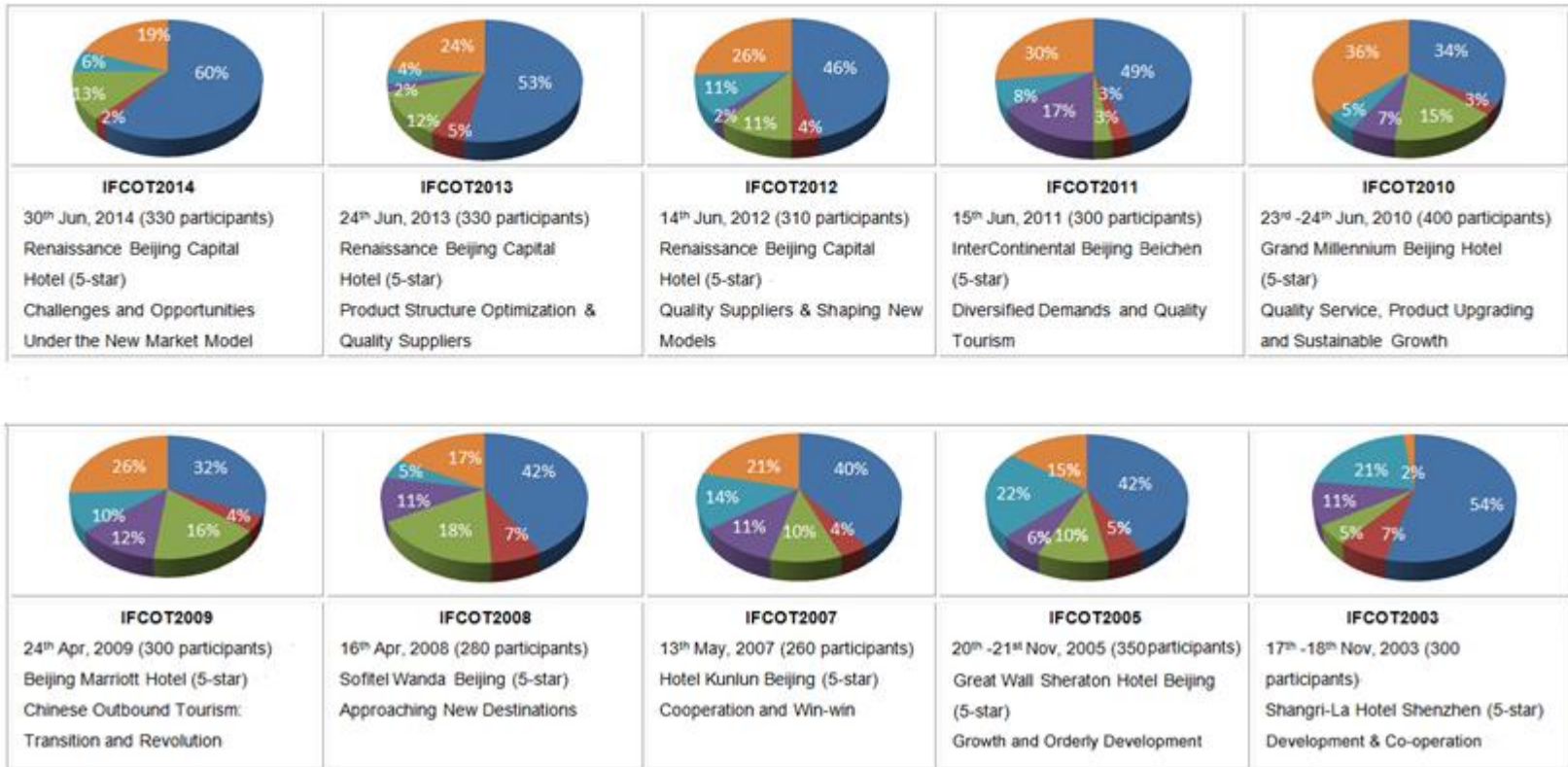
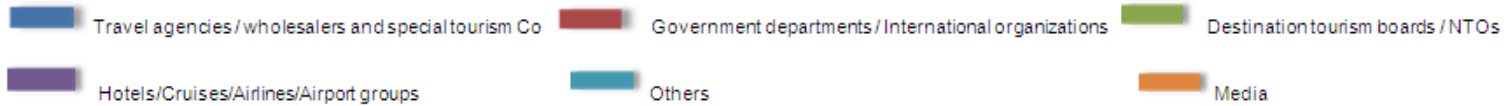
One on One Business Exchange between Exhibitor and Travel Trade Buyer



Chinese Media Interview with Delegates of Bahamas Ministry of Tourism

往届论坛参会人员结构

Participant Structure of Past IFCOT



合作旅行社

Part of IFCOT Travel Trade Partners

IFCOT has close partnerships with hundreds of outbound travel agencies all over China, including (listed in no particular order) :

Major travel groups and leading outbound tour operators:

CITS (China International Travel Service), GZL (GuangZhi Lv International Travel Service), CTS (China Travel Service Head Office),

Jinjiang International Travel, BTG(BTG International Travel & Tours), CYTS (China Youth Travel Service), U-tour, Hua Yuan International Travel CO., LTD, CCT (China Comfort Travel), etc.

Leading MICE operators:

CHINA CYTS M.I.C.E. SERVICE CO., LTD., CITS (China International Travel Service),

CCT (China Comfort Travel), CTS (China Travel Service Head Office)

More....



合作媒体 IFCOT Media Partners

IFCOT has established close cooperation with dozens of mainstream industry and public media, who gave a great amount of reports on IFCOT event. Some of the media were invited to interview IFCOT VIP delegates. Following are part of the media partners:



Print Media:



Television & Radio:



Internet Media:



Each IFCOT attracted over 50 media. These mainstream media have released extra-large reports and live broadcasting, which made the forum well-known and high-profile.

谢谢！
Thanks!



wxj@ivyalliance.cn