Preferences and Attitudes of Chinese Outbound Travelers: The Hotel Industry Welcomes a Growing Market Segment

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Abstract
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Keywords
hotels, Chinese travelers, hotel amenities, tourism marketing

Disciplines
Business | Hospitality Administration and Management

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Preferences and Attitudes of Chinese Outbound Travelers: The Hotel Industry Welcomes a Growing Market Segment

by Peng Liu, Ph.D., Qingqing Lin, Lingqiang Zhou, Ph.D., and Raj Chandnani
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EXECUTIVE SUMMARY

Numbering more than 70 million, the market of outbound Chinese travelers is already large and continues to grow. A survey of Chinese travel operators paints a picture of their clients as a focused group of travelers who seek to experience diverse aspects of the world’s cultures on trips while also making the best possible use of the time available. To that end, China’s travelers prefer such hotel room amenities as a pot to make hot water for tea, and a double sink with a separate vanity. A buffet breakfast is also high on the list, as another time saver. Most travel organizers book their clients in full-service urban hotels, because the travelers want to be close to shopping, attractions, and activities, while resorts are less popular. Although China’s outbound tourists have primarily been visiting nearby Pacific-region destinations, their target destinations are expanding to Europe and the United States, among other locations. While tour package price is always a consideration in deciding where to go, a particular problem for the Chinese travelers is the difficulty of obtaining U.S. visas. While China’s travelers would prefer planning their own independent trips, the reality is that package tours are the most practical for the foreseeable future. The world’s hotel chains have taken notice of this important market, and have developed concepts and amenities specifically intended to improve the guest experience for Chinese travelers.
**Peng Liu**, Ph.D., is an assistant professor at the Cornell University School of Hotel Administration. His primary research focuses on real estate finance, financial management, and hospitality and tourism research. Liu’s research has been published in the *Review of Financial Studies, Management Science, Journal of Real Estate Finance and Economics*, and *Cornell Hospitality Quarterly* among others. Prior to his academics, Liu worked in various industries, including engineering, advertising, consulting, and hedge funds (Peng.Liu@cornell.edu) or write to him at Statler Hall, Cornell University, Ithaca, NY 14853.

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The confluence of a booming economy, appreciation of the yuan, the rise of personal wealth, and a rapidly expanding middle class have encouraged the Chinese to expand their travel horizons. (The Chinese middle class is already larger than the entire population of the U.S.) In 2012, an estimated 80 million Chinese tourists will travel overseas, spending US$80 billion in the process, according to the China National Tourism Agency (CNTA). By 2020, there will be 100 million outbound travelers from China, according to the United Nations World Tourism Organization (UNWTO). The China Outbound Tourism Research Institute (COTRI) confirms that this means that China will be the largest source market for global tourism before 2020.
Although the outbound Chinese market is growing exponentially, it is still evolving and remains relatively young. COTRI notes that approximately 70 percent of all outbound trips from mainland China only happened within the past six years. To further underscore the magnitude of this still emerging market, Dragon Trail articulates “there will be an average of 25 million first-time Chinese travelers every year, or 70,000 every day, for the next 10 years.”

Hong Kong, Macau, Japan, and South Korea have been the chief beneficiaries of Chinese outbound travel in recent years, accounting for around 75 percent of arrivals from Mainland China in 2010, according to CNTA, but as we see in this report Chinese travelers are interested in destinations in Europe and North America. The study presented here outlines Chinese travelers’ preferences, and documents the efforts being made by hotel to meet the wants and needs of this market.

Multifaceted Consumers

Not surprisingly, the preferences of China’s travelers stem from their culture. China is a Confucian society, a mercurial combination of top-down patriarchy and bottom-up social mobility. Its citizens are driven by an ever-present conflict between standing out and fitting in and between ambition and regimentation. The collectivist themes of family and nation are eternal pillars of identity, and the Western concept of individualism doesn’t exist.

The Chinese fixation on luxury brands directly correlates to peer recognition. This is the reason that Chinese customers are willing to pay substantial premiums for products that are consumed in public or yield external benefits. This willingness to spend in certain areas is counterbalanced by stratospheric savings rates, conservative buying behavior, and extreme price sensitivity. Wang Xinjun of Ivy Alliance Consulting notes that Chinese travelers indulge on leisure vacations, while leading a rather humble life at home.

The Millionaire Next Door

China is now home to the largest number of self-made millionaires and billionaires in the world (defined as any individual with personal wealth of RMB 10 million or more), according to The Hurun Report.1 (At prevailing exchange rates, one renminbi yuan is worth about US$16 cents.) The fastest growing numbers of millionaires are in second-, third-, and fourth-tier cities, including Dalian, Chengdu, Xiamen, and Kunming. In keeping with China’s remarkable economic growth, this new segment of Chinese consumers has amassed their wealth in a relatively short period—one-half the affluent consumers were not classified as wealthy four years ago. The Hurun Report outlines that affluent Chinese consumers travel abroad three times a year, and that Chinese millionaires take an average of 15 days holiday annually. 2

This second wave of outbound Chinese tourists is smart, inquisitive, and confident, with aspirations to explore other countries. International travel provides enviable social cachet in China, an indicator of a person’s status and

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2 Ibid.
Consumer Preferences

To date, researchers who have explored Chinese outbound tourists’ expectations and preferences have surveyed individual travelers. Studies suggested that Mainland Chinese leisure travelers prefer package travel because of the convenience and reasonable prices. Thus, China’s tour operators are in a position to be knowledgeable about the food and accommodations tourists prefer as part of their packages.

For this reason, in this study we interviewed 51 outbound tour operators. We believe that this is the first study to interview tour operators to understand what Chinese package travelers seek. Our

affluence. These travelers are seeking leisure trips with authentic experiences, where they can immerse themselves in a new culture and interact with the locals. In that regard they are not exceptionally different from China’s existing international travelers, who are the subject of this study.


findings are intended to help hotel operators and destination marketers better understand this growing market. We believe this is particularly important because, as we mentioned above, with their newfound wealth Chinese travelers are anticipated to eventually transition away from packages in favor of independent travel.

In conducting this study, we are mindful of the dual nature of personal preferences and motivations, which may be both intrinsic, reflecting individual likes and dislikes, and extrinsic, or socially conditioned. Following the logic of other studies that analyze travelers’ preferences to describe and forecast tourist choice behavior, this study can draw inferences from current travel patterns regarding what the travelers in the Chinese outbound market will prefer in terms of destinations.

The preference analysis in the study includes tourists’ preference for tourism destinations, preferred activities, type of hotels, and required amenities and facilities. This analysis relates motivational factors to tourists’ preference ratings of various destinations and develops an understanding of what factors are driving preferences.

**Methodology**

We believe that this survey of travel operators is a logical starting point for understanding Chinese travelers’ preferences, because most Chinese travelers use organized tour groups. Employing a semi-structured interview format via telephone, we collected qualitative information from 51 of China’s leading outbound tour operators in the following areas: (1) desired destinations, (2) length of vacations, (3) seasonality, (4) profile of travelers, (5) preferred activities, (6) hotel preference—type of hotels, guestrooms, bathrooms, food and beverage offerings, amenities, and design features, and (7) budget and other matters needing the attention of hotel and destination managers. We also interviewed representatives of major international chains regarding their interactions with this important market segment.

For the tour packagers, we first obtained a list of 1,069 state-authorized outbound travel agencies from the CNTA and then used province location as a clustering mechanism to select 300 of those agencies (Exhibit 3). It is obvious that the number of permitted outbound tour agencies varied greatly between provinces due to regional differences, especially the provincial economy. As shown in Exhibit 3, the largest number of outbound travel agencies are located in Beijing and in Guangdong (China’s largest province, located on the coast of the South China Sea).

Once the sample base was set, we commenced calling agencies starting with the oldest, as indicated by their (low) permit number, which gives a general indication of when an agency was granted its permit from the CNTA. We endeavored to contact a person in charge of outbound tourism at each agency. If we could not connect with a representative on the second attempt we removed that agency from our sample. On average, most interviews lasted more than half an hour (the range was about 20 minutes to about 80 minutes). The full survey results are given in the Appendix and the chief conclusions are summarized below.

**Findings**

**Destinations and activities.** Using a 5-point scale, we began the interview by asking about the likely growth prospects in the next five years for the following ten destinations in the Asia-Pacific region: Bali, Hawaii, Hong Kong, Indonesia, Japan, Korea, Macau, Malaysia, Thailand, and Vietnam. Respondents did not view any of these ten destinations as particularly popular for future travel (all scores were below 4.0), but the four most popular destinations in this group were Bali, Korea, Hawaii, and Japan (Exhibit 4). Several respondents noted that concerns about political stability affected tours to Thailand, and Japan continues to suffer lingering effects from the 2011 earthquake. On the other hand, South Korea remains a relatively popular destination because of
is arranging visas for visitors, as we discuss in more detail below.

When we asked the tour operators which international regions would become increasingly popular, nearly three-quarters (72.55%) mentioned Europe (Exhibit 5). Nearly all respondents (94.12%) thought their clients preferred Europe’s urban experiences over rural travel. They expected to arrange trips through the countryside only for official business and outdoor enthusiasts. Tour operators also mentioned that Europe is a relatively familiar destination for many Chinese, and it offers attractive shopping activities and charming cities.

Well over half (56.86%) of the respondents indicated that North America would be increasing popular, followed by Australia (37.25%), and the Middle East (27.45). Despite America’s popularity, respondents reported that the biggest obstacle to growth of U.S. tours is arranging visas for visitors, as we discuss in more detail below.

The respondents thought that shopping and beach tourism were the activities that would grow the most over time (2.92 on a 4-point scale, Exhibit 6), followed by cultural tourism (2.49), eco-tourism (2.41), gambling-based tourism (2.35), and theme park focused tourism (2.35). The culture of gift giving motivates Chinese consumers to allocate a substantial amount of their travel budget on shopping. Since luxury products in mainland China are expensive due to taxes and duties, popular buying lists include luxury products, fashion clothing, jewelry, watches, cosmetics, and electronics.

### Decision Factors

Package price remains the most influential factor in choosing a package (Exhibit 7), while red tape in obtaining a visa is second, especially for tours to the United States, which require government bonds, visa fees, and mandatory face-to-face interviews. Other factors are the availability of holiday time and stability of the local political situation. In keeping with the importance of price in choosing a destination, nearly two-thirds of the respondents (64.7%), agreed that budget was the primary consideration in planning an outbound tour.

Two-thirds of the respondents cited the internet (66.7%) as the most influential channel relative to destination selection (Exhibit 8). According to Digital Influence Index, China boasts 500 million internet users in China (more than the entire population of Europe), and is one of the most engaged countries on social networks. Social media is perhaps the most influential medium in modern China, ahead of travel agents, newspapers, magazines, or television. Despite the
“Great Firewall of China,” which blocks popular Western websites, China’s own social networking sites such as Sina Weibo (a Chinese version of Twitter); Renren and Kaixin001 (Chinese versions of Facebook); Youku (Chinese version of YouTube); Jiepang (a location-based social media app); and Daodao (Chinese version of TripAdvisor) have exploded in popularity and influence. According to TNS Digital Life Report, Chinese residents trust reviews and insights on social media three times more than a recommendation from friends and relatives, and internet sites directly influence the choice of leisure destinations and booking hotels. One respondent further cited the Chinese romantic comedy If You Are the One, in which a lonely businessman finds love on Hokkaido, as promoting a boom in tourism to Japan’s remote, northernmost island.

The majority (72.5%) of respondents thought that on average, Chinese travelers would have holidays of longer duration over the next five years. In this regard, they cited a rising appreciation for exploration, recreation, and relaxation among Chinese travelers. The three Golden Week holidays each year have further stimulated outbound leisure travel, in which those days off are often combined with travelers’ annual leave time. In addition to the lunar New Year, the spring Golden Week occurs during the first week of May, and the autumn Golden Week is part of the National Day holiday in October. Additionally, most Chinese workers receive five to fifteen vacation days per year, in addition to a scattering of legal holidays. Although the Golden Weeks are gigantic for travel, some respondents observed that price-sensitive tourists deliberately avoid traveling during Golden Week holidays to avoid potentially inflated package prices.

**Travel Patterns**

Asked to indicate the future growth in different travel segments (on a 4-point scale, Exhibit 9), the segment where respondents expected the strongest growth was families with young children (3.1), closely followed by retired couples and singles (3.0) and young professional single travelers (2.9). The least growth in travelers was multi-generational family groups (2.3).

The respondents stated that group travel would continue to dominate the outbound tourism market for the foreseeable future, particularly as long as language remains a barrier for independent travelers. In a separate survey (now in progress), the travelers themselves indicated a desire to travel more on their own and customize their leisure travel itineraries based on their interests. Therefore, we anticipate that an increasing number of Chinese visitors will be likely to travel independently in the future, and not necessarily as part of formal tour groups.

**Accommodation and Food**

In examining these travelers’ preferences for hotel amenities and food service, we see that Chinese travelers seek to make the most of time on their trip. Chinese travelers have no specific hotel preference, but they do like touches that reflect their cultural values. They prefer full-service hotels in center cities, in keeping with the tour operators’ observation that their clients prefer an urban experience (Exhibit 10). Also as a matter of efficiency, the tour groups do want a hotel that serves breakfast. Since “travelers prefer to stay where they are free to shop and feel close to local life,” as several respondents said, urban hotels were more popular (60.78%) than resort hotels (45.10%), and agencies tended to choose full service...
hotels (88.24%) to ensure needed services. One respondent observed that “only as a last resort do they arrange resort hotels for customers.”

Considering amenities in the rooms themselves, we again see the influence of culture and time efficiency (Exhibit 11). Tea and coffee making facilities were most important (3.29 out of 4), followed by wi-fi and internet availability (2.37). Dedicated storage (2.23) was third. Although rooms must of course be clean and safe, Chinese tourists are not focused on cooking facilities, TV, or other in-room technology. These tourists normally do not have time or energy to cook or watch television programs.

The focus on efficiency extends to bathroom facilities (Exhibit 12). The top three features are: (1) dual sinks (3.61), (2) a shower (3.59), and (3) a separate make-up vanity (2.47), with the idea of reducing time waiting for bathroom facilities. Besides the facilities listed above, respondents also indicated that a hair drier and non-slip mat were required.

Although resorts are not the top destination, we asked the tour operators to evaluate resort amenities (Exhibit 13). Topping the list was a swimming pool (3.02 on a 4-point scale), followed by a business center (2.78), spa facilities (2.76), concierge service (2.59), and fitness facilities (2.57). Swimming is extremely popular in China, but public swimming facilities are still relatively sparse. Thus, easy access to a swimming pool is an attractive feature for a hotel. Four Seasons Hotels and Resorts, for instance, have identified recreational amenities as a competitive point of differentiation, with indoor swimming pools and efficient à la carte spa treatments, including Chinese modalities, foot treatments, and salon services to attract Chinese travelers.

Our questions about design preferences brought out another important facet regarding Chinese travelers: they seek to truly experience a destination. The tour operators said that their clients had no particular hotel design preferences, with one exception. The travelers were not interested in hotels designed in the traditional Chinese style. Said one respondent, the Chinese travelers, “wanted to see something different from that in China, experience a different culture, and see local life.”

The focus on time and efficiency surfaced again in the discussion of preferred types of restaurants, where buffet-style dining stood out (2.56), followed by formal dining (2.06) and barbeque (1.89) as a distant third (Exhibit 14). Although buffets are popular for breakfast, these travelers want to experience the local cuisine for at least one of their daily meals. Perhaps the only cultural design point that Chinese travelers bring with them is a preference for round tables, which gives everyone an equally prestigious seat and easy access to shared food.

Beyond that, bars, entertainment, and celebrity chefs received only moderate support. The travel packagers thought their customers
had little interest in dining with celebrity or signature chefs (74.51% of the respondents said no interest) due to considerations of price and uncertain popularity for one chef or another. Bars with live entertainment were relatively the most popular of nightlife options (2.47), but it was obvious that the Chinese travelers really weren’t looking for bars and entertainment (all rated below 2.5, Exhibit 15). Not surprisingly, then (as shown in Exhibit 16), Chinese travelers allocate most of their travel budget to lodging and transportation and less on meals and entertainment.7

7 We did not ask about shopping in this survey, but in another survey currently in progress, shopping is important, especially for luxury products.

Application and Implementation in the Hospitality Industry

A recent study by The Boston Consulting Group revealed that 95 percent of Chinese tourists are unsatisfied with current travel products and services. Although these travelers seek to learn about the cultures they visit, BCG has identified a fundamental shift among Chinese travelers: Western practices, amenities, and service culture may no longer be imposed on this group. Instead, the Chinese market requires thoughtful adaptation, new forms of marketing and differentiated means of fulfillment. Chinese consumers actively prefer Western brands over their domestic competitors, but their tastes and preferences still remain distinctly Chinese.8

Recognizing this evolution, international hotel chains have launched programs and initia-

8 Boston Consulting Group, March 2011, “Taking Off: Travel and Tourism in China and Beyond”.
tives designed for Chinese tourists, particularly independent travelers. We offer some examples in this section from the interviews we conducted with international hotel chains based in the U.S.

**Hilton.** Hilton Worldwide launched Huanying in August 2011. Inspired by the Chinese word for “welcome,” this program has been successfully implemented at 70 properties in 23 countries where there is a critical mass of inbound Chinese travelers. To convey a warm, authentic welcome, Huanying highlights three key touch points: arrival, guestroom, and breakfast experiences. Huanying includes fluent Mandarin-speaking team members; guestroom amenities such as a selection of Chinese teas and tea kettles, slippers, and a dedicated television channel with Chinese programming; and breakfast items that include congee, dim sum, fried rice, and noodles. As the program has evolved, it features Mandarin orange trees in hotel lobbies during Chinese New Year, along with signature red envelopes and bonus Hilton HHonors points for Chinese loyalty guests. Andrew Flack, Hilton’s vice president of global brand marketing, affirmed the success of Huanying, which has yielded a 120-percent annual growth in Chinese source demand, or nearly double organic growth, at the participating properties since the launch. Moreover, the Chinese guests stay longer and spend more relative to travelers from other international markets.

**Starwood.** Starwood Hotels and Resorts debuted the Starwood Personalized Travel Program in June 2011, a series of initiatives that includes an in-house Chinese specialist to assist with translation and guest requests; in-room amenities that include tea kettles, Chinese tea, instant noodles, slippers, and toiletries; welcome packets and menus in Mandarin; and familiar foods such as congee, noodles, and rice. Starwood has also opened a customer contact center in Guangzhou, which employs associates fluent in different Chinese dialects to further accommodate growing demand. Qian Jin, president of Greater China, notes that these programs have yielded a 35 percent increase in Starwood Preferred Guests (SPG) from China. Moreover, 60 percent of guests in Starwood’s China hotels are domestic travelers, and 75 percent of Starwood’s guests in secondary and emerging cities in China are domestic travelers. Specific positive feedback from guests include the time savings and corresponding reduced apprehension about food and language, especially after long-haul trips, and the ability to redeem SPG points for aspirational vacations.

**Four Seasons.** In addition to the features we mentioned above, Four Seasons Hotels and Resorts offers multi-lingual staff at many of their hotels, including Mandarin speakers. Four Seasons also launched a Chinese language website, Life by Four Seasons, which highlights the Chinese aspirations of luxury, romance, and gourmet dining. China UnionPay is also integrated into the booking engine to facilitate online payments. Peter Weber, regional vice president, shared that the expansive and elegant lobby lounges at their five properties in mainland China have been effective links to the Chinese community, where locals conduct business with international guests, enjoy traditional tea service, and are exposed to the brand.

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9 Dim Sum is a Cantonese style breakfast.
A Growing Market Segment

Without doubt, the international hotel industry has recognized the importance of long-haul Chinese outbound travelers and have noted their preferences. Based on the intimate knowledge of Chinese tour operators, their clients seek to travel to North America and Europe, and shopping is the single most popular leisure activity. Price and time were two major concerns for Chinese outbound tourists when traveling abroad, but U.S. officials should take note of the barrier presented by visa procedures. Not surprisingly, internet and social media inspire and influence decisions regarding destination choice. As for travel segments, families with young children, retired couples, and singles will see the greatest growth. The tour operators anticipate that organized tours will remain the dominant mode of travel for at least the next five years, although we see the stirrings of interest in independent travel. According to respondents, full-service-hotels in urban areas are the most preferred type of hotel. Chinese tourists want the ability to make tea in their hotel room, and they appreciate bathrooms with dual sinks and a shower. Specific design aesthetics and entertainment options are not as important to these travelers, but they want to experience local cuisines, balanced with Chinese menu options.

InterContinental. Earlier this year, InterContinental Hotels Group (IHG) unveiled Hualuxe Hotels and Resorts, the first international brand designed specifically for the Chinese traveler. Hua translates to “majestic China” and luxe represents luxury. With nearly 30 years of operating hotels in China, IHG will have some 100,000 guest rooms in China, according to Keith Barr, chief executive of Greater China. IHG treats China as a stand-alone business region separate from other Asia Pacific destinations. The firm's development pipeline includes twenty letters of intent and anticipates a presence in 100 cities across China in the next twenty years, along with extending the brand overseas to gateway markets that appeal to Chinese travelers.

Hualuxe's distinctive service standards will include a signature greeting fitting Chinese etiquette, a gracious VIP welcome offering, and authentic Chinese hospitality throughout. Business delegation members are recognized by status and seniority, through prioritized check-in, dining orders, and room placement on higher floors by rank within the group. The Chinese values of balance and harmony are highlighted with garden views into the lobby, along with natural light to provide a relief to urbanization. Guestroom designs will be inspired by contemporary Chinese design, with Chinese art, premium tea ware, and relaxing bathroom retreats. To promote a tea culture, lobbies will feature a traditional Tea House (rather than a bar or lobby lounge) where guests can enjoy a wide selection of high quality teas, in addition to alcoholic selections. The food and beverage offering also includes an indulgent Noodle House, which will be open late night, and provide high-quality quick meals as an alternative to room service. The cultural tradition of conducting business and entertaining will be accommodated in dedicated business suites that can accommodate meetings, casual seating, formal dining, entertaining, and recreational activities.

A Growing Market Segment

Although Chinese outbound tourism is still in its infancy, the market is growing rapidly into a large, sophisticated group of consumers that is having ripple effects on hospitality industry around the world. When hosting Chinese guests, understanding their preferences and satisfying these needs will require a combination of insight into cross cultural behaviors, understanding of customs, and common hospitality. Hence, Western practitioners, to be successful competitors for this market, should be well-prepared to accommodate the basic needs of Chinese tourists and to offer social and psychological familiarity and comfort.
### Desired Destinations

1. **Over the next five years which destinations in Asia do you see as growing in popularity?**

<table>
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<th>Destination</th>
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<th>Limited growth</th>
<th>Strong growth</th>
<th>Exceptional growth</th>
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<td>16(31.37%)</td>
<td>26(50.98%)</td>
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<td>Vietnam</td>
<td>5(9.8%)</td>
<td>25(49.02%)</td>
<td>18(35.29%)</td>
<td>3(5.88%)</td>
</tr>
<tr>
<td>Bali</td>
<td>1(1.96%)</td>
<td>6(11.76%)</td>
<td>26(50.98%)</td>
<td>18(35.29%)</td>
</tr>
<tr>
<td>Korea</td>
<td>0(0%)</td>
<td>11(21.57%)</td>
<td>30(58.82%)</td>
<td>10(19.61%)</td>
</tr>
<tr>
<td>Japan</td>
<td>2(3.92%)</td>
<td>12(23.53%)</td>
<td>27(52.94%)</td>
<td>10(19.61%)</td>
</tr>
<tr>
<td>Hawaii</td>
<td>1(1.96%)</td>
<td>14(27.45%)</td>
<td>25(49.02%)</td>
<td>11(21.57%)</td>
</tr>
</tbody>
</table>

2. **Over the next five years which international destinations do you see as growing in popularity?**

<table>
<thead>
<tr>
<th>Destination</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Europe</td>
<td>37</td>
<td>72.55%</td>
</tr>
<tr>
<td>North America</td>
<td>29</td>
<td>56.86%</td>
</tr>
<tr>
<td>Africa</td>
<td>9</td>
<td>17.65%</td>
</tr>
<tr>
<td>Middle East</td>
<td>14</td>
<td>27.45%</td>
</tr>
<tr>
<td>Australia</td>
<td>19</td>
<td>37.25%</td>
</tr>
<tr>
<td>New Zealand</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>

3. **Specifically, what cities are most popular in North America?**

<table>
<thead>
<tr>
<th>City</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>New York</td>
<td>25</td>
<td>49.02%</td>
</tr>
<tr>
<td>Washington</td>
<td>16</td>
<td>31.37%</td>
</tr>
<tr>
<td>Others</td>
<td>15</td>
<td>29.41%</td>
</tr>
<tr>
<td>Las Vegas</td>
<td>14</td>
<td>27.45%</td>
</tr>
<tr>
<td>Hawaii</td>
<td>14</td>
<td>27.45%</td>
</tr>
<tr>
<td>Los Angeles</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>San Francisco</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>Toronto</td>
<td>8</td>
<td>15.69%</td>
</tr>
<tr>
<td>Vancouver</td>
<td>6</td>
<td>11.76%</td>
</tr>
</tbody>
</table>
4. In Europe, is the aspiration to experience a mix of city or urban experiences or to enjoy a mix of urban and countryside?

<table>
<thead>
<tr>
<th>Option</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>A mix of city or urban experiences</td>
<td>48</td>
<td>94.12%</td>
</tr>
<tr>
<td>A mix of urban and countryside</td>
<td>3</td>
<td>5.88%</td>
</tr>
</tbody>
</table>

5. What influences travel decisions?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ease of air access</td>
<td>9</td>
<td>17.65%</td>
</tr>
<tr>
<td>Ease of obtaining visas</td>
<td>28</td>
<td>54.90%</td>
</tr>
<tr>
<td>Package pricing</td>
<td>32</td>
<td>62.75%</td>
</tr>
<tr>
<td>Others</td>
<td>17</td>
<td>33.33%</td>
</tr>
</tbody>
</table>

6. What (medium or source) inspires destination choice?

<table>
<thead>
<tr>
<th>Source</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Movies</td>
<td>20</td>
<td>39.22%</td>
</tr>
<tr>
<td>Celebrities</td>
<td>8</td>
<td>15.69%</td>
</tr>
<tr>
<td>Internet</td>
<td>34</td>
<td>66.67%</td>
</tr>
<tr>
<td>Magazines</td>
<td>18</td>
<td>35.29%</td>
</tr>
<tr>
<td>Others</td>
<td>16</td>
<td>31.37%</td>
</tr>
</tbody>
</table>

Length of Vacations

7. For regional holidays, what is the average length of stay?

<table>
<thead>
<tr>
<th>Length</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;3 days</td>
<td>0</td>
<td>0.00%</td>
</tr>
<tr>
<td>3-4 days</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>5-6 days</td>
<td>34</td>
<td>66.67%</td>
</tr>
<tr>
<td>7-8 days</td>
<td>20</td>
<td>39.22%</td>
</tr>
<tr>
<td>&gt;8 days</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>

8. For international (long-haul) holidays, what is the average length of stay?

<table>
<thead>
<tr>
<th>Length</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>&lt;10 days</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>10-12 days</td>
<td>35</td>
<td>68.63%</td>
</tr>
<tr>
<td>13-15 days</td>
<td>22</td>
<td>43.14%</td>
</tr>
<tr>
<td>&gt;15 days</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>
9. What is the trend in vacation lengths—longer holidays or shorter?

<table>
<thead>
<tr>
<th>Trend</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Longer</td>
<td>37</td>
<td>72.55%</td>
</tr>
<tr>
<td>Shorter</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Not Sure</td>
<td>10</td>
<td>19.61%</td>
</tr>
</tbody>
</table>

10. Is vacation length influenced by available time or budget?

<table>
<thead>
<tr>
<th>Factor</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Time</td>
<td>11</td>
<td>21.57%</td>
</tr>
<tr>
<td>Budget</td>
<td>33</td>
<td>64.71%</td>
</tr>
<tr>
<td>Both time and budget</td>
<td>7</td>
<td>13.73%</td>
</tr>
</tbody>
</table>

Seasonality

11. Which are the peak months for travel?

<table>
<thead>
<tr>
<th>Time Period</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>25</td>
<td>49.02%</td>
</tr>
<tr>
<td>February</td>
<td>20</td>
<td>39.22%</td>
</tr>
<tr>
<td>March</td>
<td>8</td>
<td>15.69%</td>
</tr>
<tr>
<td>April</td>
<td>13</td>
<td>25.49%</td>
</tr>
<tr>
<td>May</td>
<td>16</td>
<td>31.37%</td>
</tr>
<tr>
<td>June</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>July</td>
<td>30</td>
<td>58.82%</td>
</tr>
<tr>
<td>August</td>
<td>28</td>
<td>54.90%</td>
</tr>
<tr>
<td>September</td>
<td>16</td>
<td>31.37%</td>
</tr>
<tr>
<td>October</td>
<td>26</td>
<td>50.98%</td>
</tr>
<tr>
<td>November</td>
<td>12</td>
<td>23.53%</td>
</tr>
<tr>
<td>December</td>
<td>9</td>
<td>17.65%</td>
</tr>
<tr>
<td>Summer break</td>
<td>16</td>
<td>31.37%</td>
</tr>
<tr>
<td>Chinese New Year</td>
<td>14</td>
<td>27.45%</td>
</tr>
<tr>
<td>National Day</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>Spring</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>Fall</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>Winter break</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>May Day</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Winter</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Summer</td>
<td>1</td>
<td>1.96%</td>
</tr>
</tbody>
</table>
12. What is the low season for travel?

<table>
<thead>
<tr>
<th>Month</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>January</td>
<td>12</td>
<td>23.53%</td>
</tr>
<tr>
<td>February</td>
<td>13</td>
<td>25.49%</td>
</tr>
<tr>
<td>March</td>
<td>17</td>
<td>33.33%</td>
</tr>
<tr>
<td>April</td>
<td>12</td>
<td>23.53%</td>
</tr>
<tr>
<td>May</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>June</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>July</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>August</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>September</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>October</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>November</td>
<td>20</td>
<td>39.22%</td>
</tr>
<tr>
<td>December</td>
<td>16</td>
<td>31.37%</td>
</tr>
<tr>
<td>After Chinese New Year</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>After National Day</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>

Profile of Travelers

13. Where do you see the strongest growth in travelers over the next five years?

<table>
<thead>
<tr>
<th>Profile</th>
<th>No growth</th>
<th>Limited growth</th>
<th>Strong growth</th>
<th>Exceptional growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Young professional single travelers</td>
<td>3(5.88%)</td>
<td>13(25.49%)</td>
<td>22(43.14%)</td>
<td>13(25.49%)</td>
</tr>
<tr>
<td>Families with young children</td>
<td>1(1.96%)</td>
<td>7(13.73%)</td>
<td>29(56.86%)</td>
<td>14(27.45%)</td>
</tr>
<tr>
<td>Multi-generational family groups</td>
<td>8(15.69%)</td>
<td>23(45.1%)</td>
<td>18(35.29%)</td>
<td>2(3.92%)</td>
</tr>
<tr>
<td>Retired couples and singles</td>
<td>2(3.92%)</td>
<td>12(23.53%)</td>
<td>20(39.22%)</td>
<td>17(33.33%)</td>
</tr>
</tbody>
</table>

14. Do you believe group organised travel will continue to dominate or more bespoke independent travel will grow in next five years?

<table>
<thead>
<tr>
<th>Option</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Group organised travel will grow</td>
<td>32</td>
<td>62.75%</td>
</tr>
<tr>
<td>Bespoke independent travel will grow</td>
<td>19</td>
<td>37.25%</td>
</tr>
</tbody>
</table>

Preferred Activities

15. Which areas of activity do you anticipate strong growth over the next five years?

<table>
<thead>
<tr>
<th>Profile</th>
<th>No growth</th>
<th>Limited growth</th>
<th>Strong growth</th>
<th>Exceptional growth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cultural tourism—exploring historic cities and buildings</td>
<td>5(9.8%)</td>
<td>19(37.25%)</td>
<td>24(47.06%)</td>
<td>3(5.88%)</td>
</tr>
<tr>
<td>Gambling based tourism</td>
<td>7(13.73%)</td>
<td>24(47.06%)</td>
<td>15(29.41%)</td>
<td>5(9.8%)</td>
</tr>
<tr>
<td>Shopping focused trips</td>
<td>4(7.84%)</td>
<td>11(21.57%)</td>
<td>21(41.18%)</td>
<td>15(29.41%)</td>
</tr>
<tr>
<td>Special interest tourism—wine, political history, art</td>
<td>9(17.65%)</td>
<td>24(47.06%)</td>
<td>14(27.45%)</td>
<td>4(7.84%)</td>
</tr>
<tr>
<td>Theme park focused tourism</td>
<td>8(15.69%)</td>
<td>20(39.22%)</td>
<td>20(39.22%)</td>
<td>3(5.88%)</td>
</tr>
<tr>
<td>Beach tourism</td>
<td>1(1.96%)</td>
<td>17(33.33%)</td>
<td>18(35.29%)</td>
<td>15(29.41%)</td>
</tr>
<tr>
<td>Golf tourism</td>
<td>11(21.57%)</td>
<td>28(54.9%)</td>
<td>8(15.69%)</td>
<td>4(7.84%)</td>
</tr>
<tr>
<td>Eco-tourism and adventure travel</td>
<td>7(13.73%)</td>
<td>23(45.1%)</td>
<td>14(27.45%)</td>
<td>7(13.73%)</td>
</tr>
</tbody>
</table>
16. Are there any other activities, excursions, or interest areas where you see potential growth?

<table>
<thead>
<tr>
<th>Activities</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Honeymoon</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>Award tour</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>Parent-child travel</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Wedding</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>Study tour</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Health care/beauty tour</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>None</td>
<td>21</td>
<td>41.18%</td>
</tr>
</tbody>
</table>

**Hotel Preferences**

17. What type of hotels do you predict will be most in demand as Chinese travelers journey to North America and Europe?

<table>
<thead>
<tr>
<th>Type</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resort</td>
<td>23</td>
<td>45.10%</td>
</tr>
<tr>
<td>Urban</td>
<td>31</td>
<td>60.78%</td>
</tr>
<tr>
<td>Full-service</td>
<td>45</td>
<td>88.24%</td>
</tr>
<tr>
<td>Limited service</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Aparthotel</td>
<td>3</td>
<td>5.88%</td>
</tr>
</tbody>
</table>

18. Are there any other activities, excursions, or interest areas where you see potential growth?

<table>
<thead>
<tr>
<th>Hotel Brand</th>
<th>Number of Responses</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hilton</td>
<td>16</td>
<td>31.37%</td>
</tr>
<tr>
<td>Sheraton</td>
<td>9</td>
<td>17.65%</td>
</tr>
<tr>
<td>Marriott</td>
<td>7</td>
<td>13.73%</td>
</tr>
<tr>
<td>Holiday Inn</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>Accor</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Shangri-la</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Sofitel</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Intercontinental</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Others</td>
<td>6</td>
<td>11.76%</td>
</tr>
</tbody>
</table>

19. What facilities within a hotel bedroom are highly sought after?

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Not important</th>
<th>Quite Important</th>
<th>Very Important</th>
<th>Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wi-fi and internet</td>
<td>15(29.41%)</td>
<td>12(23.53%)</td>
<td>14(27.45%)</td>
<td>10(19.61%)</td>
</tr>
<tr>
<td>High level of in-room technology—TV with DVD, iPad or laptop</td>
<td>36(70.59%)</td>
<td>10(19.61%)</td>
<td>2(3.92%)</td>
<td>3(5.88%)</td>
</tr>
<tr>
<td>Tea and coffee making facilities</td>
<td>7(13.73%)</td>
<td>3(5.88%)</td>
<td>9(17.65%)</td>
<td>32(62.75%)</td>
</tr>
<tr>
<td>Limited cooking facilities</td>
<td>41(80.39%)</td>
<td>4(7.84%)</td>
<td>1(1.96%)</td>
<td>5(9.8%)</td>
</tr>
<tr>
<td>Ironing board</td>
<td>32(62.75%)</td>
<td>14(27.45%)</td>
<td>2(3.92%)</td>
<td>3(5.88%)</td>
</tr>
<tr>
<td>Mini Bar</td>
<td>21(41.18%)</td>
<td>10(19.61%)</td>
<td>7(13.73%)</td>
<td>13(25.49%)</td>
</tr>
<tr>
<td>Specific storage</td>
<td>32(62.75%)</td>
<td>8(15.69%)</td>
<td>5(9.8%)</td>
<td>6(11.76%)</td>
</tr>
</tbody>
</table>
20. Are there any other facilities that are regarded as desirable?

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hair dryer</td>
<td>8</td>
<td>15.69%</td>
</tr>
<tr>
<td>Disposable toiletries</td>
<td>7</td>
<td>13.73%</td>
</tr>
<tr>
<td>Plug adapter</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>Water kettle</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Cups</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>Telephone</td>
<td>3</td>
<td>5.88%</td>
</tr>
</tbody>
</table>

21. What sort of snacks and refreshments do Chinese travelers like in their rooms?

<table>
<thead>
<tr>
<th>Snacks</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Local specialties</td>
<td>25</td>
<td>49.02%</td>
</tr>
<tr>
<td>Chinese</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>Sweet dessert</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>

22. What are the bathroom preferences of Chinese travelers?

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Not important</th>
<th>Quite Important</th>
<th>Very Important</th>
<th>Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bath</td>
<td>34(66.67%)</td>
<td>7(13.73%)</td>
<td>5(9.8%)</td>
<td>5(9.8%)</td>
</tr>
<tr>
<td>Shower</td>
<td>2(3.92%)</td>
<td>6(11.76%)</td>
<td>3(5.88%)</td>
<td>40(78.43%)</td>
</tr>
<tr>
<td>Both bath &amp; shower</td>
<td>23(45.1%)</td>
<td>15(29.41%)</td>
<td>6(11.76%)</td>
<td>7(13.73%)</td>
</tr>
<tr>
<td>Dual sinks</td>
<td>2(3.92%)</td>
<td>47(84%)</td>
<td>6(11.76%)</td>
<td>39(76.47%)</td>
</tr>
<tr>
<td>Separate WC</td>
<td>35(68.63%)</td>
<td>3(5.88%)</td>
<td>5(9.8%)</td>
<td>8(15.69%)</td>
</tr>
<tr>
<td>Bidet</td>
<td>30(58.82%)</td>
<td>12(23.5%)</td>
<td>2(3.92%)</td>
<td>7(13.73%)</td>
</tr>
<tr>
<td>Open plan layout</td>
<td>40(78.43%)</td>
<td>8(15.69%)</td>
<td>3(5.88%)</td>
<td>0(0%)</td>
</tr>
<tr>
<td>Separate make-up vanity</td>
<td>14(27.45%)</td>
<td>14(27.45%)</td>
<td>8(15.69%)</td>
<td>15(29.41%)</td>
</tr>
</tbody>
</table>

23. Any other issues regarding bathrooms?

<table>
<thead>
<tr>
<th>Issues</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hair dryer</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>Slip-resistant</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>Safety</td>
<td>3</td>
<td>5.88%</td>
</tr>
</tbody>
</table>

Food and Beverage

24. What type of restaurants are preferred by Chinese travelers?

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Not popular</th>
<th>Quite popular</th>
<th>Very popular</th>
<th>Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Buffet-style dining</td>
<td>4(7.84%)</td>
<td>19(37.25%)</td>
<td>23(45.1%)</td>
<td>5(9.8%)</td>
</tr>
<tr>
<td>Formal dining</td>
<td>13(25.49%)</td>
<td>28(54.9%)</td>
<td>4(7.84%)</td>
<td>6(11.76%)</td>
</tr>
<tr>
<td>Café or coffee shops</td>
<td>21(41.18%)</td>
<td>22(43.14%)</td>
<td>2(3.92%)</td>
<td>6(11.76%)</td>
</tr>
<tr>
<td>Sushi bars</td>
<td>23(45.1%)</td>
<td>22(43.14%)</td>
<td>5(9.8%)</td>
<td>1(1.96%)</td>
</tr>
<tr>
<td>Fast food-style operations</td>
<td>27(52.94%)</td>
<td>18(35.29%)</td>
<td>3(5.88%)</td>
<td>3(5.88%)</td>
</tr>
<tr>
<td>Barbeque</td>
<td>18(35.29%)</td>
<td>22(43.14%)</td>
<td>10(19.61%)</td>
<td>1(1.96%)</td>
</tr>
</tbody>
</table>
25. Aside from traditional Chinese cuisine, what other cuisines are growing in popularity?

<table>
<thead>
<tr>
<th>Cuisine</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Japanese</td>
<td>14</td>
<td>27.45%</td>
</tr>
<tr>
<td>Local specialties</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>Thai</td>
<td>9</td>
<td>17.65%</td>
</tr>
<tr>
<td>French</td>
<td>7</td>
<td>13.73%</td>
</tr>
<tr>
<td>Italian</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>American</td>
<td>4</td>
<td>7.84%</td>
</tr>
</tbody>
</table>

26. Are there preferred cuisines by mealtimes?

<table>
<thead>
<tr>
<th>Preference</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Chinese cuisine</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Different by mealtimes</td>
<td>49</td>
<td>96.08%</td>
</tr>
</tbody>
</table>

27. Are celebrity restaurants or signature chefs popular?

<table>
<thead>
<tr>
<th>Popular</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>13</td>
<td>25.49%</td>
</tr>
<tr>
<td>No</td>
<td>38</td>
<td>74.51%</td>
</tr>
</tbody>
</table>

28. Are there types of bars and entertainment that are growing in popularity?

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Not popular</th>
<th>Quite popular</th>
<th>Very popular</th>
<th>Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bars with live entertainment</td>
<td>3(5.88%)</td>
<td>23(45.1%)</td>
<td>23(45.1%)</td>
<td>2(3.92%)</td>
</tr>
<tr>
<td>Bars with karaoke</td>
<td>20(39.22%)</td>
<td>16(31.37%)</td>
<td>15(29.41%)</td>
<td>0(0%)</td>
</tr>
<tr>
<td>Specialist Bars (e.g., whiskey or vodka theme)</td>
<td>18(35.29%)</td>
<td>20(39.22%)</td>
<td>13(25.49%)</td>
<td>0(0%)</td>
</tr>
<tr>
<td>Nightclubs</td>
<td>22(43.14%)</td>
<td>22(43.14%)</td>
<td>6(11.76%)</td>
<td>1(1.96%)</td>
</tr>
</tbody>
</table>

29. Any other comments on F&B facilities?

<table>
<thead>
<tr>
<th>Comments</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cleanliness</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>Taste</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>Chinese waiters</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>Chopsticks</td>
<td>3</td>
<td>5.88%</td>
</tr>
</tbody>
</table>
Amenities

30. How essential are the following amenities in resort hotels?

<table>
<thead>
<tr>
<th>Facilities</th>
<th>Not popular</th>
<th>Quite popular</th>
<th>Very popular</th>
<th>Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Swimming pool</td>
<td>3 (5.88%)</td>
<td>13 (25.49%)</td>
<td>15 (29.41%)</td>
<td>20 (39.22%)</td>
</tr>
<tr>
<td>Fitness facilities</td>
<td>9 (17.65%)</td>
<td>18 (35.29%)</td>
<td>10 (19.61%)</td>
<td>14 (27.45%)</td>
</tr>
<tr>
<td>Tennis Courts</td>
<td>13 (25.49%)</td>
<td>21 (41.18%)</td>
<td>11 (21.57%)</td>
<td>6 (11.76%)</td>
</tr>
<tr>
<td>Golf</td>
<td>18 (35.29%)</td>
<td>21 (41.18%)</td>
<td>9 (17.65%)</td>
<td>3 (5.88%)</td>
</tr>
<tr>
<td>Water sports</td>
<td>18 (35.29%)</td>
<td>21 (41.18%)</td>
<td>10 (19.61%)</td>
<td>2 (3.92%)</td>
</tr>
<tr>
<td>Spa facilities</td>
<td>1 (1.96%)</td>
<td>24 (47.06%)</td>
<td>12 (23.53%)</td>
<td>14 (27.45%)</td>
</tr>
<tr>
<td>Hairdressing salon</td>
<td>21 (41.18%)</td>
<td>16 (31.37%)</td>
<td>8 (15.69%)</td>
<td>6 (11.76%)</td>
</tr>
<tr>
<td>Nightclub</td>
<td>19 (37.25%)</td>
<td>23 (45.1%)</td>
<td>5 (9.8%)</td>
<td>4 (7.84%)</td>
</tr>
<tr>
<td>Casino</td>
<td>14 (27.45%)</td>
<td>19 (37.25%)</td>
<td>9 (17.65%)</td>
<td>9 (17.65%)</td>
</tr>
<tr>
<td>Children’s Clubs and activities</td>
<td>13 (25.49%)</td>
<td>13 (25.49%)</td>
<td>16 (31.37%)</td>
<td>9 (17.65%)</td>
</tr>
<tr>
<td>Selection of gift shops and boutiques</td>
<td>13 (25.49%)</td>
<td>19 (37.25%)</td>
<td>10 (19.61%)</td>
<td>9 (17.65%)</td>
</tr>
<tr>
<td>Business Centre</td>
<td>8 (15.69%)</td>
<td>15 (29.41%)</td>
<td>8 (15.69%)</td>
<td>20 (39.22%)</td>
</tr>
<tr>
<td>Concierge Services</td>
<td>11 (21.57%)</td>
<td>15 (29.41%)</td>
<td>9 (17.65%)</td>
<td>16 (31.37%)</td>
</tr>
<tr>
<td>Translation services</td>
<td>29 (56.86%)</td>
<td>17 (33.33%)</td>
<td>3 (5.88%)</td>
<td>2 (3.92%)</td>
</tr>
</tbody>
</table>

31. Any other popular facilities or amenities?

<table>
<thead>
<tr>
<th>Facility</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Massage</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Hot springs</td>
<td>1</td>
<td>1.96%</td>
</tr>
<tr>
<td>Beauty salon</td>
<td>1</td>
<td>1.96%</td>
</tr>
</tbody>
</table>

Resort Hotel Design Features

32. What type of hotel design are Chinese travellers drawn to?

<table>
<thead>
<tr>
<th>Style</th>
<th>Not popular</th>
<th>Quite popular</th>
<th>Very popular</th>
<th>Essential</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contemporary (modern and minimalist)</td>
<td>8 (15.69%)</td>
<td>22 (43.14%)</td>
<td>17 (33.33%)</td>
<td>4 (7.84%)</td>
</tr>
<tr>
<td>Traditional</td>
<td>20 (39.22%)</td>
<td>21 (41.18%)</td>
<td>10 (19.61%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Ethnic (Chinese)</td>
<td>25 (49.02%)</td>
<td>19 (37.25%)</td>
<td>7 (13.73%)</td>
<td>0 (0%)</td>
</tr>
<tr>
<td>Historic Buildings (castles, palaces)</td>
<td>8 (15.69%)</td>
<td>8 (15.69%)</td>
<td>34 (66.67%)</td>
<td>1 (1.96%)</td>
</tr>
<tr>
<td>Contextual (inspired by locale)</td>
<td>4 (7.84%)</td>
<td>14 (27.45%)</td>
<td>28 (54.9%)</td>
<td>5 (9.8%)</td>
</tr>
<tr>
<td>Thematic</td>
<td>12 (23.53%)</td>
<td>17 (33.33%)</td>
<td>21 (41.18%)</td>
<td>1 (1.96%)</td>
</tr>
</tbody>
</table>

33. Any other design preferences?

<table>
<thead>
<tr>
<th>Design preference</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Grand</td>
<td>7</td>
<td>13.73%</td>
</tr>
<tr>
<td>Local style</td>
<td>5</td>
<td>9.80%</td>
</tr>
<tr>
<td>Unique</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Clean</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>High class appearance</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Bright</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>
34. How do travelers segregate their budget between transportation, hotel, meals, and entertainment?

<table>
<thead>
<tr>
<th>Items</th>
<th>Score</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transportation</td>
<td>3.24</td>
</tr>
<tr>
<td>Hotel</td>
<td>2.75</td>
</tr>
<tr>
<td>Meals</td>
<td>1.61</td>
</tr>
<tr>
<td>Entertainment</td>
<td>1.29</td>
</tr>
</tbody>
</table>

35. What is the average budget for a Chinese traveler going to Europe?

<table>
<thead>
<tr>
<th>Budget</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000 - 15,000</td>
<td>17</td>
<td>33.33%</td>
</tr>
<tr>
<td>15,001 - 20,000</td>
<td>17</td>
<td>33.33%</td>
</tr>
<tr>
<td>20,001 - 25,000</td>
<td>8</td>
<td>15.69%</td>
</tr>
<tr>
<td>25,001 - 30,000</td>
<td>7</td>
<td>13.73%</td>
</tr>
<tr>
<td>30,001 - 35,000</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>35,001 - 40,000</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>&gt;40,000</td>
<td>7</td>
<td>13.73%</td>
</tr>
</tbody>
</table>

36. What is the average budget for a Chinese traveler going to North America?

<table>
<thead>
<tr>
<th>Budget</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>10,000 - 15,000</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>15,001 - 20,000</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>20,001 - 25,000</td>
<td>14</td>
<td>27.45%</td>
</tr>
<tr>
<td>25,001 - 30,000</td>
<td>15</td>
<td>29.41%</td>
</tr>
<tr>
<td>30,001 - 35,000</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>35,001 - 40,000</td>
<td>6</td>
<td>11.76%</td>
</tr>
<tr>
<td>&gt;40,000</td>
<td>11</td>
<td>21.57%</td>
</tr>
</tbody>
</table>
37. Are there any unique traditions or rituals that hotel companies need to be aware of to enhance the stay of a Chinese visitor?

<table>
<thead>
<tr>
<th>Traditions or rituals</th>
<th>Number</th>
<th>Percent</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accommodation to Chinese culture</td>
<td>9</td>
<td>17.65%</td>
</tr>
<tr>
<td>Cleanliness</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Manners</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>Hot water</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>Chinese waiters and signs</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>Holiday ambience</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Suitable price</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>

38. Are there any unique traditions or rituals that hotel companies need to be aware of to enhance the stay of a Chinese visitor?

<table>
<thead>
<tr>
<th>Complaint</th>
<th>Number</th>
<th>Percentage</th>
</tr>
</thead>
<tbody>
<tr>
<td>Low-quality lodging or dining</td>
<td>15</td>
<td>29.41%</td>
</tr>
<tr>
<td>Bad tour guides</td>
<td>12</td>
<td>23.53%</td>
</tr>
<tr>
<td>Bad shopping experience</td>
<td>12</td>
<td>23.53%</td>
</tr>
<tr>
<td>Slow transportation</td>
<td>10</td>
<td>19.61%</td>
</tr>
<tr>
<td>Bad travel schedule</td>
<td>7</td>
<td>13.73%</td>
</tr>
<tr>
<td>Inadequate local hospitality services</td>
<td>7</td>
<td>13.73%</td>
</tr>
<tr>
<td>Unaccustomed to dining/lodging</td>
<td>4</td>
<td>7.84%</td>
</tr>
<tr>
<td>Never get full</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>Undesirable lodging location</td>
<td>3</td>
<td>5.88%</td>
</tr>
<tr>
<td>Scanty food</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Unvaried diet</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Cleanliness problems</td>
<td>2</td>
<td>3.92%</td>
</tr>
<tr>
<td>Unfriendly local people</td>
<td>2</td>
<td>3.92%</td>
</tr>
</tbody>
</table>