



Chinese & Brazilian Outbound Tourism Markets and Netnography

7th UNWTO/PATA Forum on Tourism Trends and Outlook

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Who we are

“Work together to build the value of tourism to all the beautiful and diverse countries of Europe through cooperating in areas of sharing best practices, market intelligence and promotion”.

ETC is an international non profit-making organisation based in Brussels.

ETC is responsible for the promotion of Europe as a tourist destination.

It represents 33 National Tourist Organisations (NTOs) in Europe.

ETC undertakes three basic activities: marketing, research and advocacy.



Research as a core service to ETC members

“ETC is an international marketing organisation that promotes Europe as a tourist destination, provides a range of market intelligence and e-services to its members, and encourages the sharing of best practices”.

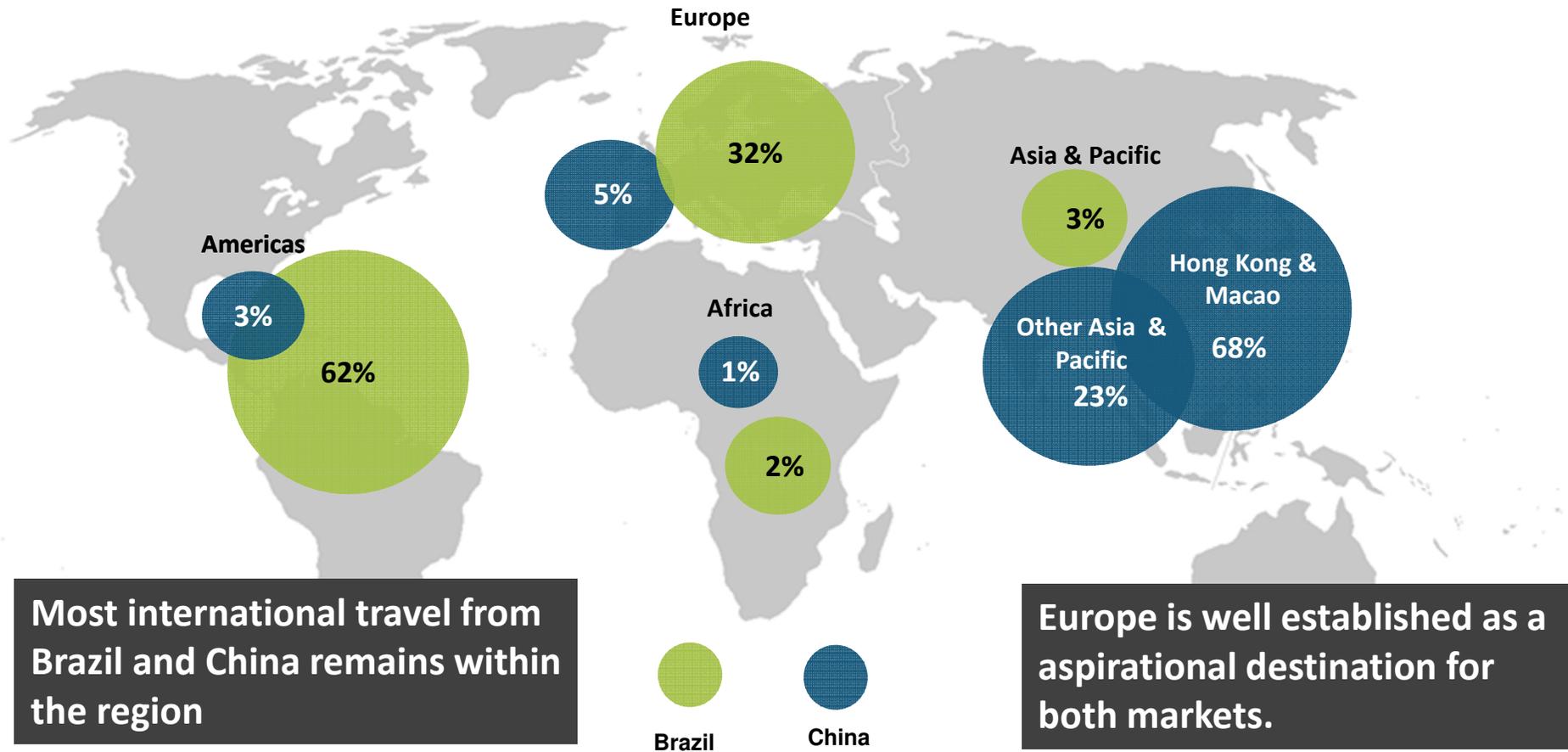
Market Intelligence Group (MIG): ETC expert group on research, it comprises the research directors of all 33 NTOs who are ETC members.

Market Intelligence Committee (MIC): the ‘*steering group*’ responsible to realise the MIG research programme. It consists of approximately 10 *volunteers of the MIG*.

Executive Unit Research & Development Department: ETC research unit, it provides research support to ETC members and the Executive Unit. It also provides management and coordination support to the MIC and MIG.



How can Europe tap the potential of these fast growing markets?



Source: ETC & UNWTO, The Chinese Outbound Travel Market – 2012 update; market shares 2011
ETC & UNWTO, Understanding Brazilian Outbound Tourism; market shares 2010



An innovative and cost-effective research approach

Understand the mind of the traveller through netnography

Netnography = ethnography adapted to the online social world



QUALITATIVE text analysis:

- In-depth reading of individual blogs, microblogs, forum **posts**, and other online content
- Analysis of over 1,000 **photographs** taken by travellers and shared online
- A qualitative analysis of **travel types, motivations, and behaviour**



QUANTITATIVE text analysis

- Over 50 million microblog posts
- Over 20 million blogposts
- Search statistics from Internet search engines Baidu and Google
- Clustering of bloggers into travel groups and extraction of themes and trends related to travel and Europe

Millions of user stories, millions of opportunities

China

- **83%** use instant messaging
- **66%** blog / have a personal space
- **55%** microblog
 - 65% post via mobile phones
- **49%** use social networking sites
- **45%** email
- **43%** shop online
- **20%** book travel online

Brazil

- **79%** use social networking sites
- **78%** email
- **36%** shop online
 - A third of e-commerce are travel sales
- **23%** use VoIP
- **22%** microblog
- **15%** blog

Source: China: China Internet Network Information Center (2013) / Brazil: ETC New Media Trend Watch





The new Chinese traveller

- Looks for an **in-depth travel experience** (from standardized group travel to FIT)
- **Better educated** (96% of Chinese hold higher educational degree)
- Is skilled with **social media** and Internet usage (513 million Internet users, 3 times as active in social media as American Internet users)
- Is an **urban dweller**
- Remains **price sensitive**
- Fascinated with **anything Chinese** met during the Europe trip





Planning a trip to Europe

Inspiration and decision

- Emotional connection
ties spurred by movies, music, literature and historical figures
- Images
nature, blue skies
- Price
- Time effectiveness
capture Europe's diversity within a limited time

Must see/do

- Churches, palaces and historical monuments
- Small towns
- Attractions associated with cultural figures
Marx, Picasso, Mozart, Goethe
- Attractions related to brands
Mercedes/BMW

Barriers

- Complicated visa procedures
it also affects booking
- Complex information landscape
packing a trip is perceived as an overly complicated task
- Lack of in-depth info on destinations
- Language barriers





Experiencing a trip in Europe

Must-see/do

- Arts and culture of great importance
- Meet likeminded Chinese
in small towns with a Chinese community

Delights

- Good preservation of historic attractions
- Clean and beautiful environment
- High level of cultural sophistication
- Friendly, helpful people
- Timely public transport
- Not crowded, safe cities

Annoyances

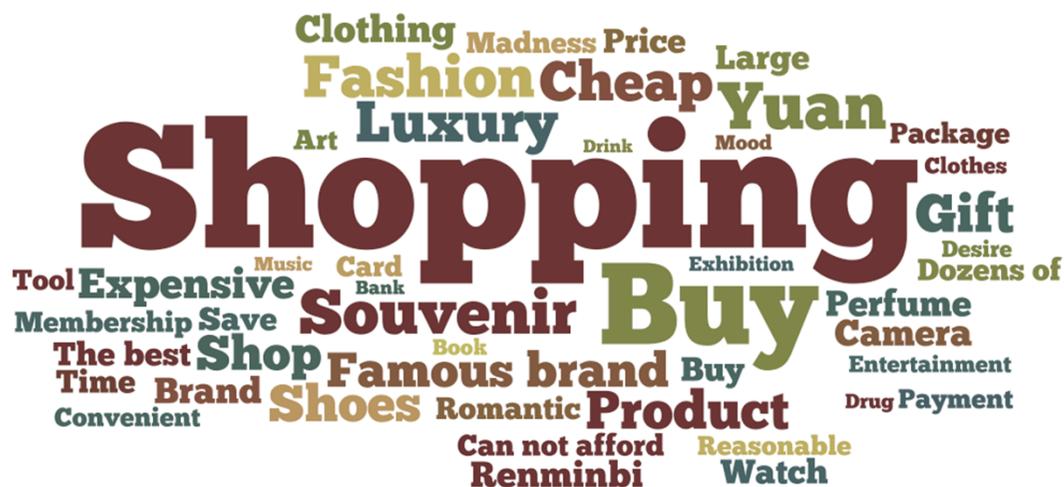
- High prices
- Lack of Chinese language information and material
- Unable to use Chinese debit cards in most places
- Bad food
- Shops close early
- Worse hotel facilities than in China
- Rude and rigid customs

" Cities are peaceful and clean and skies are blue."





Europe is "the" place for shopping



Chinese Travel Budget

- 34% shopping
- 17% air fare
- 18% accommodation
- 9% entertainment
- 3% travel agency service



"Europe is a shopping heaven, it has all luxury brands, whether Louis Vuitton or Cartier or Hermes. So I go to Europe to get the most choices when buying luxury products."





Europe is ideal for honeymoon travel

Mention: **+150%** p.y.

"I and my beloved wife travelled to amazing Greece. We experienced the sweetness and romance of the myriad Greek islands, embraced the serendipitous blue sky at the Aegean Sea, kissed in front of temple ruins, and felt the warm breeze on a passionate boat trip. We will forever live happily together."



Courtesy of Chai Ran and Huang Yanfang



Photography is a central aspect of honeymoon travel. Chinese couples invest huge sums of money in creating and capturing memories, or “capturing their youth”. Travel groups are springing up around the theme of wedding photography





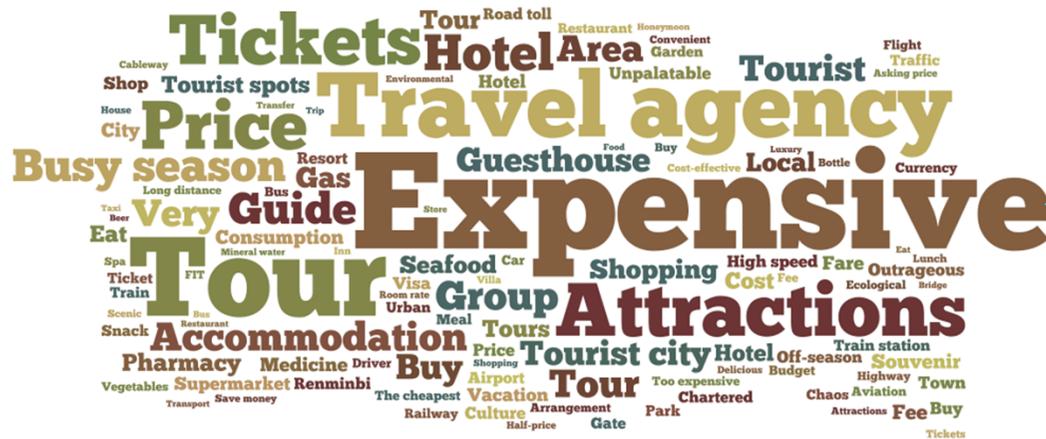
Blue skies – an underestimated advantage

"Take a picture in any direction and it will show a beautiful landscape. Look anywhere and you will see a sky bluer than what you've ever seen in Beijing."





Chinese travellers are still price conscious



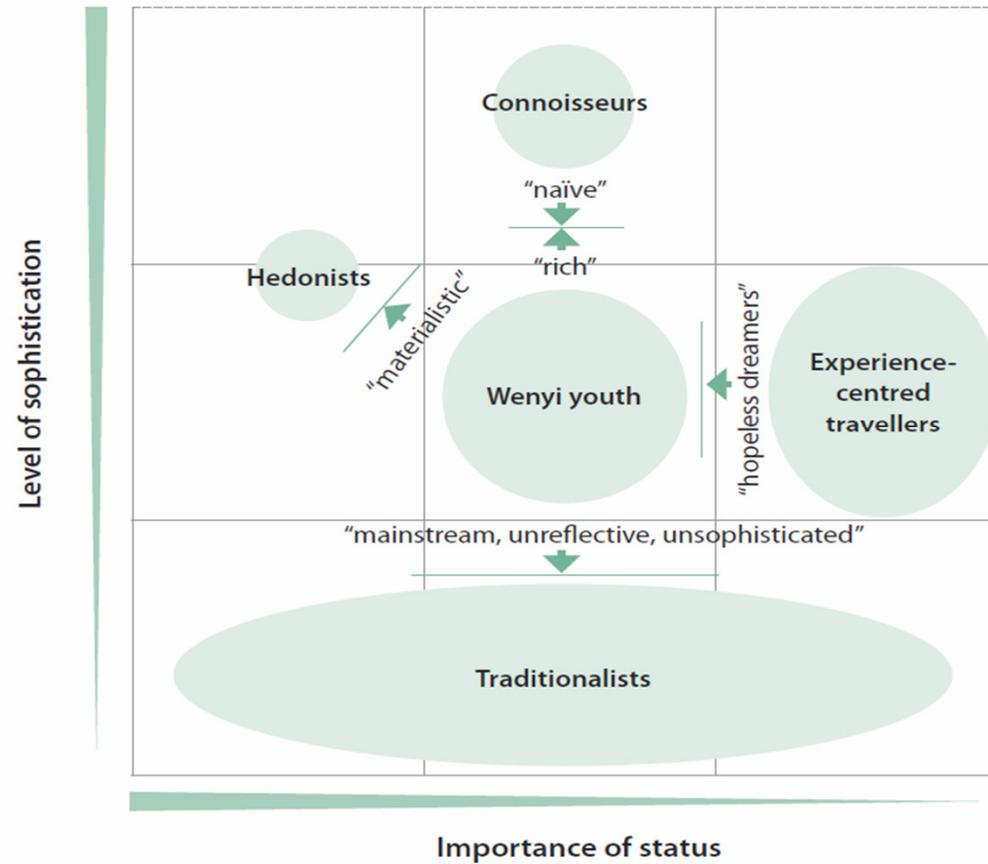
Renting a bicycle in the Netherlands] costs 10 euro per day. For that price I can get a second hand bicycle in China.

Food, accommodation, and transportation are items where most travellers try to save money, whereas entertainment and shopping are allowed to be more costly.





Choose your tribe – but do not overlook the Traditionalists!

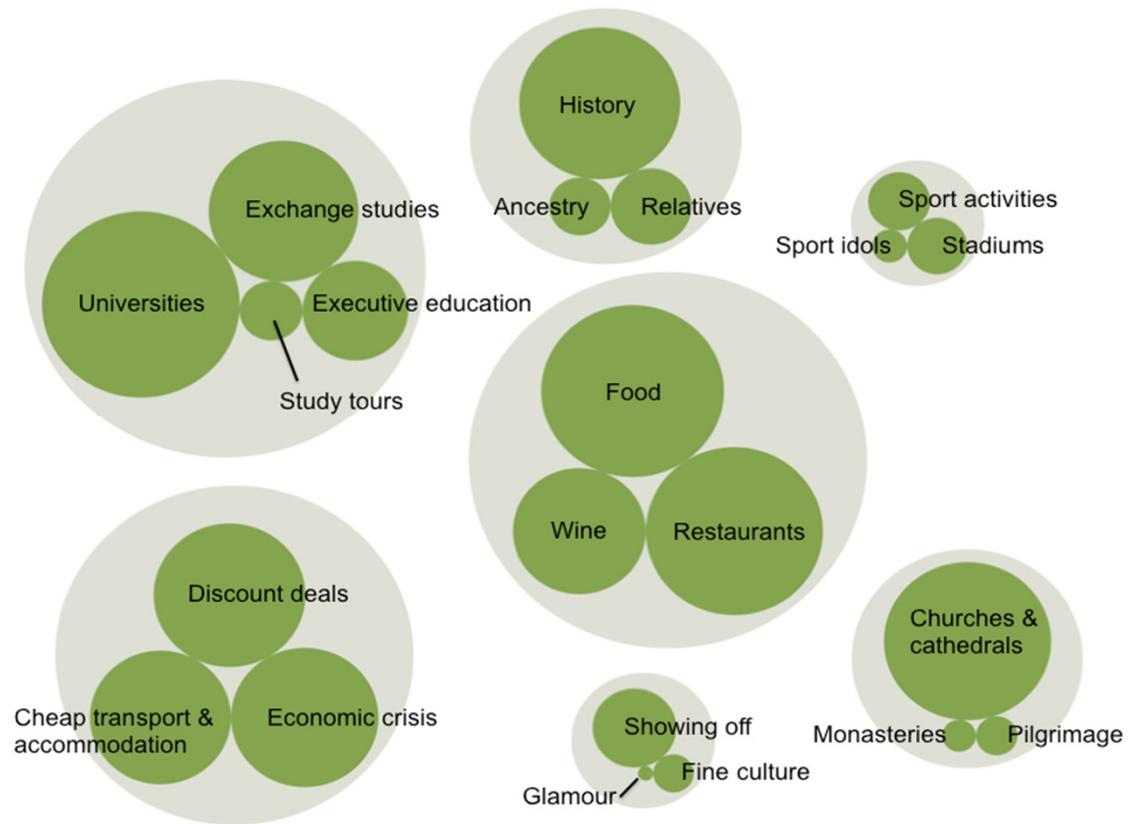




The image of Europe in Brazil

Major themes:

- Educational program
- Seeking their roots
- Gastronomy
- Seeking opportunity in crisis
- Religious tourism
- Sports tourism
- Glamour and prestige



Source: ETC & UNWTO, Understanding Brazilian Outbound Tourism





Europe as a synonym of prestige and glamour

"Ah, I miss that!"

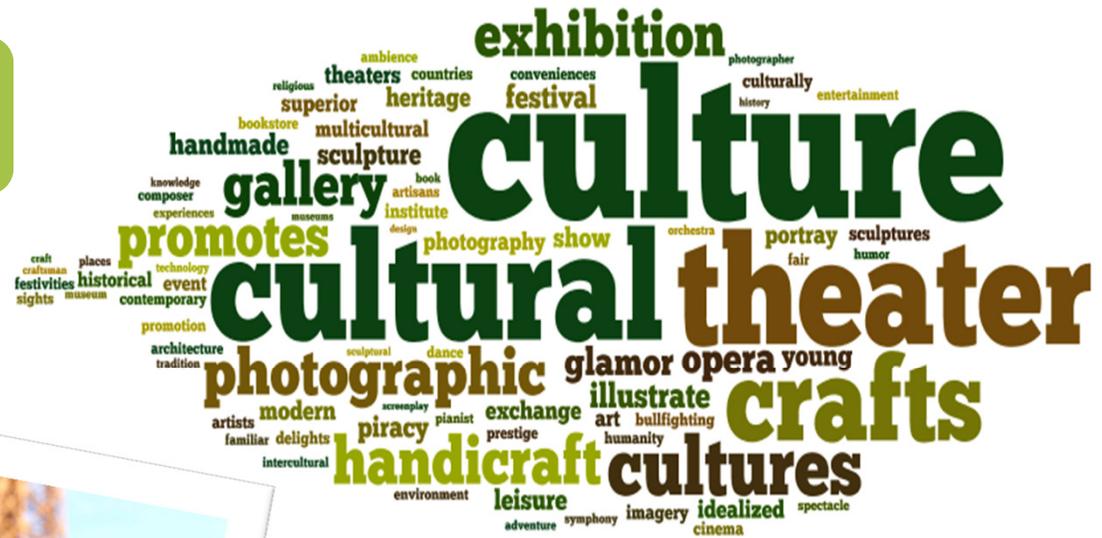


Image: © ariwasabi





Crisis as an opportunity – Europe at a discount...

“Great discounts on trips to Europe now! I just booked a trip to Lisbon.”



“I would like to see nice places and countries by train and spend as little money as possible to see as many countries as possible. I'm wondering if I can stop by the cities I like for a couple of days and then carry on with the trip with the same ticket.”

Source: ETC & UNWTO, Understanding Brazilian Outbound Tourism



Conclusions



Brazil

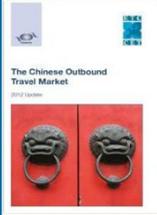
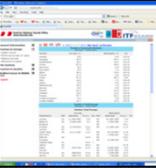
**Get the basics right and avoid frustrations.
Focus on distinct features of the destination.**

China

**FIT will be the future.
'Storify' your destination.
Make your authenticity offer
"China-friendly".
Choose your tribe.**



ETC Publications

<h2>Market studies</h2>	 <h3>Outbound travel markets</h3>	<h2>Trends watch</h2>	 <h3>Quarterly reports</h3>	<h2>Best practice handbooks</h2>	
 <h3>Market insights</h3>	 <h3>Netnographic studies</h3>	 <h3>TourMIS</h3>	 <h3>Interesting articles</h3>	<h2>Dissemination</h2>	 <h3>Dashboard</h3> <h3>Seminars</h3>
<h3>Competitors analysis</h3>	<h3>Bench marking</h3> 				

etc-corporate.org/reports





Thank you for your attention!

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