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?

Most international travel from Brazil and China remains within the region. Europe is well established as a aspirational destination for both markets.

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

ETC CET

EUROPE visiteurope.com
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 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

"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."

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
Back to the roots
Brazilian Diaspora

“Getting to know Italy was simply extraordinary [...] If you get lost in Rome, wherever you go is beautiful [...] there is so much history and culture.”

"It was in one of the villages within the city of Riós that my father was born and my grandparents lived. In addition to aunts and uncles, cousins and friends I have a true affection for this region and I have come here ever since I was a child".

Source: ETC & UNWTO, Understanding Brazilian Outbound Tourism
Europe as a synonym of prestige and glamour

“Ah, I miss that!”
European gastronomy – a delight for Brazilian travellers

“The church [Saint-Germain-des-Prés] was closed for maintenance, so we went to a nearby restaurants instead. I am so happy it was closed, the food was heavenly.”

Source: ETC & UNWTO, Understanding Brazilian Outbound Tourism
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
Sports – longing to see the teams live!

“We took a self-guided tour of Camp Nou football stadium [in Barcelona] and followed in the footsteps of famous players such as Kubala, Cruyff, Maradona, Guardiola and Ronaldinho.”

Source: ETC & UNWTO, Understanding Brazilian Outbound Tourism
Conclusions

FIT will be the future.
‘Storify’ your destination.
Make your authenticity offer “China-friendly”.
Choose your tribe.

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

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

etc-corporate.org/reports
Thank you for your attention!

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