



ITALIAN OUTDOORS

The changing preferences of Chinese travelers: Pandemic effect or long-term trend?

The Chinese market today represents a sort of remote but tangible Eldorado, of which almost everyone has heard about the miraculous effect but has great difficulty in grasping its dynamics and above all in having a real and tangible exchange with it.

With its specific and unique ecosystem made up of local social media, influencers, and governed by different dynamics, it represents a challenge for newbies, and the well-established giants still slip on the different culture that defines this system.

A market where only in 2006, 134 countries were recognized as ADS (Approved Destination Status) and therefore eligible as destinations for tourists, and a country that only in 2008 saw the introduction of paid holidays: it is no coincidence that it is from this moment that Chinese outbound tourism was born: a business that eight years ago (2013) recorded 88 million international travelers; bringing the number up to 166 million in 2019.

According to COTRI Group, there will be 240 million Chinese international travelers by 2040. Today, Chinese passport holders make up 11% of the population.

Today, the population belonging to the middle class is about 10%, while by 2030 this social segment is expected to increase to 35%, bringing the number to 396 million. Upper-middle class people (276 million) will reach 19.7%, as of today 7.1%; high-spenders will top at 14.5% (204 million), as of today 2.6%.

The potential and repercussions are obvious. This is a market that can define hospitality trends around the world.

According to a recent survey by China Luxury Advisor - and confirmed by similar studies - Italy is in the top 5 of preferred destinations; OTAs are the preferred tool for bookings, while traditional tour operators are still operating steadily, even for the FIT segment which is clearly increasing.

SAFETY and NATURAL ENVIRONMENT

The key factors leading to the choice of a destination, which is selected on the basis of comments, recommendations, reviews from friends, bloggers, travel guides - in nuce the factor of social visibility within Chinese social media is simply crucial.

A new element that emerges is the preference for future activities:

OUTDOOR SPORTS, PARTICIPATION in an ATHLETIC COMPETITION and "ONCE IN A LIFETIME" are clearly increasing preferences.

This offers an interesting insight, where the psychological repercussions of the pandemic shift preferences from crowded art cities to the open spaces of nature. From culture to sports. From international hotel chains to smaller establishments, discovering the "Albergo Diffuso", which is beginning to take hold in China too. A trend that is now evident in China, observing the domestic market, which has already recovered since May 2020.

The appointment set by the 2022 Winter Olympics in Beijing (a city that will host both the summer and winter Games for the first time) and the trend set by the government in developing a ski culture are also a determining factor. This is reflected in the significant investments in ice and snow tourism from 2018 to 2020, which exceeded 139 billion dollars, while winter sports tourism in China is expected to reach 230 million visits from 2021 to 2022 and its revenue to exceed 60.39 billion dollars, according to the Chinese Academy of Tourism.

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China now has 742 ski slopes, with 145 ski simulators and 45 simulator venues: these are the latest cornerstones in introducing ski culture and activity to a population that does not boast large ski facilities, and paradoxically sees the largest clusters of skiers located in the south of the country.

Surfing the Olympics wave, the government is particularly promoting this sport, setting important targets: 5.4 billion EU revenue per year from 2022 and 300 million skiers.

But it should also be pointed out that while winter is the focus of particular attention at the moment, summer is actually the holiday period with the greatest flow, and this applies to the Chinese Winter Olympic venue itself - Chungli/Taicheng - Beijing's summer holiday destination.

Outdoor as a year-round destination is the key concept for the near future. Family, extreme sports, leisure fun, gourmet, wine and traditions, history: Italy has the complete offer.

As a matter of fact, when examining and evaluating our country as a destination for the Chinese market, one must take into consideration not only holiday trends and service expectations - which are certainly fundamental - but also the *modus vivendi* and daily life that potential tourists experience in their everyday life: it is necessary to understand what is exciting, comprehensible, bearable and satisfying for people who live on the opposite side of the planet.

In China, 14 cities have more than 10 million inhabitants. 164 cities have more than 1 million inhabitants.

Beijing has 21 million inhabitants. Shanghai has 28. The commuting time experienced daily is about 3 hours on average. If you take a flight from Beijing, after 4 hours you are still in China.

Herein lies a fundamental aspect of Italy: within the same radius covered by the municipality of Beijing - which is only slightly greater than the area of Trentino Alto-Adige - tourists visiting the Italian territory are able to experience culture, good food and wine, history, art, the outdoors and sports: they can live a completely different experience with a transfer not exceeding their daily commute, and with the same distance reach an international airport or one of the icons of Italian tourism.

The possibility of creating synergies using well-known destinations as highlights, but local areas as experiences is the direction to distribute the right visibility to our whole territory, taking advantage of current trends: content to be promoted as a whole, and not as an alternative or antagonistic destination.

We have seen how Covid's experience has led to a preference for outdoor and less crowded destinations: taking into consideration other areas beside the mountains, trails (*cammini, sentieri*) are the perfect way to discover new significant routes linked to history, and to revive second-tier destinations. The traffic generated is extremely beneficial to local communities and could decongest the main destinations, redesigning a new Italian tourist route.

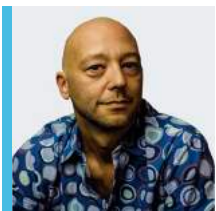
The celebration of the tourist-cultural year 2022 with China, and the support of the Chinese government

in promoting it, will be fundamental in these aspects. Second-tier destinations will certainly receive a great deal of attention, both because of the novelty of the destination, the budget options and the smaller number of visitors.

Careful storytelling and itinerary design can dramatically improve the visibility and attractiveness of these destinations.

Let's also not forget the extremely favorable sequence of appointments on the horizon, which can ensure consistent perspective and attention from the Chinese public: Italy Guest of Honour at the World Winter Sport Events(WWSE) in 2021, the Italy-China Year of Culture and Tourism 2022, the Winter Olympics in Beijing in 2022 and to close, the Milan-Cortina Winter Olympics in 2026.

The important thing is to move.



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意大利户外运动:中国游客日益变化的喜好 新冠病毒的影响还是长期趋势?

今天的中国市场就像是一个虽遥远、但可感知的理想国度,几乎所有人都听说过其神奇的效应,但却无法很好地理解其运作方式,特别是很难与其建立真实且具体的交流。

中国拥有独特且具体的运作体系,由本土社交媒体与意见领袖构成,不同的运作方式并行,对于新手而言意味着挑战,即便是经验丰富的老手在面对这种截然不同的运作体系和文化时也会犯错误。

仅在2006年,134个国家被认定为ADS(目的地地位),成为游客出境游的首选,带薪休假制度于2008年才开始在中国实施;也就是从这时开始,中国出境游应运而生:2013年,中国出境游客人数为8800万人次;2019年,这一数字升至1.6亿人次。

根据COTRI(中国出境游研究所)调查显示,2040年,中国出境游客人数将达2.4亿。中国的中产阶级目前占总人口10%,到2030年,这一比例预计将增至35%,人数达3.96亿。中上层阶级人数预计将达2.76亿,占比或达19.7%,目前为7.1%;富裕群体人数预计将达2.04亿,占比或达14.5%,目前为2.6%。潜力与影响显而易见。

这是一个能够诠释全球酒店业发展趋势的市场。

根据中国奢侈品咨询机构近期发布的报告显示,意大利在出境游首选目的地排行中位居前5;游客倾向通过在线旅行机构(OTA)预定,传统旅行社运营依旧正常运作,散客数量也呈明显增长趋势。

意大利户外运动:中国游客日益变化的喜好
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安全和自然环境是游客在选择旅行目的地时的关键因素,游客会根据评论、推荐、亲友口碑、博客写手和导游等途径了解并做出选择;此外,在中国社交媒体上的知名度也是一个重要因素,对于未来户外运动的喜好是新晋出现的一个全新因素。

中国目前拥有742个滑雪跑道、145个滑雪模拟器、45个模拟场地

户外运动,参与竞技赛事和“人生必去之地”越来越受欢迎。

这是一个有趣的现象,新冠病毒所带来的心理影响将游客从拥挤的艺术城市带进广袤的大自然中。从文化到体育,从国际化连锁酒店到精品旅社,打造更多有利于生态平衡的环境友好型酒店,这一概念已经开始在中国引起反响。中国当下的趋势很明显,纵观国内市场,可以看到,自2020年5月以来,整个行业就已经开始复苏。

北京(首个既举办过夏季奥运会、又即将举办冬季奥运会的双奥之城)冬奥即将在2022年拉开帷幕,政府正在大力推广滑雪文化,这同样也是一个决定性因素。从2018年到2020年期间在冰雪旅游上的巨大投入就可见一斑;根据中国旅游研究院调查统计,投资额超1390亿美元,中国2021年到2022年的冬季运动旅游人数预计将达2.3亿人次,收入或超603.9亿美元。

中国目前拥有742个滑雪跑道、145个滑雪模拟器、45个模拟场地:这些都是近期在推介滑雪文化和户外运动时的基础,因为中国的大型滑雪设施并不多见;然而奇怪的是,中国南方却拥有大批滑雪爱好者。

政府想要借助举办冬奥会的契机,大力推广滑雪运动,确立了重要的目标:从2022年起每年收入达54亿欧元,培养3亿名滑雪爱好者。

然而,同样需要指出的是,尽管冬季运动此刻正受到广泛关注,但夏天才是真正放假休闲的时间,也是客流量最多的时候。崇礼和太子城,这两个冬奥举办地,同时也是夏日度假好去处。

未来的关键理念是要打造一年四季都适合户外运动的旅行目的地。

无论是家庭出游、体验极限运动、休闲娱乐、还是品鉴美食美酒、传统文化和艺术,意大利可以满足一切需求。



其实,在审视和评估意大利作为中国旅游市场目的地时,不应只考虑到假日旅游趋势和服务品质等根本性要素,还应该注重生活方式等因素,因为游客还会去体验当地的日常生活,有必要让游客感受到地球另一端的精彩生活。

中国有14个人口超千万的城市,164个人口超百万的城市。

北京有2100万人口,上海有2800万人口,每天的通勤时间平均约3个小时。从北京搭乘航班,飞行4个小时后,目的地还在中国境内。意大利则不同:在北京所覆盖的相同半径内,北京的面积比特伦蒂诺-上阿迪杰大区稍大些,游客在游览意大利时可以体验文化、美食、美酒、历史、艺术与户外体育活动:游客在意大利无需耗费漫长的通勤时间,便可领略到不一样的风景,而且在同样的距离内便可抵达一座国际机场,或是意大利一处知名景点。

打造协同效应的可能性,突出展现知名目的地的魅力,提升区域旅行体验是提升意大利全境知名度的趋势,利用当前的趋势:从整体角度推广意大利,并非是一种替代型、或是对立型目的地。

新冠病毒使得人们更倾向于户外活动,选择不太拥挤的地方:可以考虑靠近山脉的地方,幽深的小径就是探索与历史紧密相连的全新路线,让二级目的地重新焕发活力。带来的游客量极大造福了当地社群,疏解了各大知名目的地的拥堵程度,重新设计一条意大利旅行线路。

2022中意旅游文化年揭幕在即,中国政府的支持对实现上述目标极为重要。

二级目的地一定会引发极大的关注度,因其有着独特新颖的魅力,合理的预算方案,相对偏少的游客数量。把故事讲好,行程设计好,就能显著扩大知名度,提升目的地的魅力。

不要忘了接下来即将轮番呈现的精彩活动,这些活动能够吸引众多中国观众的目光:意大利成为2021年冬博会(WWSE)主宾国,2022年中意旅游文化年即将拉开帷幕,2022年冬奥会即将在北京举行,以及2026年米兰-科尔蒂纳冬奥会。

关键在于要行动起来。

