

A person is shown from the waist down, holding a camera with a large lens. The background is a solid red color. Overlaid on the left side is a white network diagram consisting of several octagonal nodes connected by solid and dotted lines. The Hotels.com logo is in the top right corner.

Hotels.com®

Chinese International Travel Monitor 2016



Rome

## Chinese International Travel Monitor 2016

# Contents



Paris

Introduction	03
Foreword	05
1. Market overview	07
2. A holistic look at outbound Chinese travelers	11
3. Profiles of the types of different Chinese travelers	29
4. Hoteliers' point of view	36
5. Country initiatives targeting Chinese outbound visitors	42
About Hotels.com	46

# Introduction

Sydney

# Introduction

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This is the fifth edition of the Hotels.com™ Chinese International Travel Monitor (CITM), which takes a comprehensive look at the impact on global travel by mainland Chinese travelers.

It is based on research involving both Chinese international travelers and hoteliers around the world, combined with Hotels.com's own proprietary data and other research.

For the travelers' survey, Hotels.com used Ipsos, a world leader in market research, which in May 2016 conducted interviews with 3,000 Chinese residents, aged 18–54 years, who had traveled overseas in the past 12 months. A Computer-assisted Web Interviewing technology was used. The representative sample consisted of men and women from a number of different-tiered cities.

The travelers were asked about travel behaviour, booking methods, accommodation choices and many other aspects of their travel.

To complement this with the opinion of hoteliers, Hotels.com carried out a global survey of more than 5,800 Hotels.com accommodation partners, also during May 2016. The 37 participating countries were Argentina, Australia, Brazil, Canada, Colombia, Croatia, Czech Republic, Denmark, Finland, France, Germany, Greece, Hong Kong, Hungary, India, Indonesia, Ireland, Italy, Japan, Mexico, the Netherlands, New Zealand, Norway, Poland, Portugal, Russia, Singapore, South Korea, Spain, Sweden, Switzerland, Taiwan, Thailand, Turkey, the UK, the USA and Vietnam.

Figures on spending, including prices paid for hotel rooms, are quoted in Chinese Renminbi (RMB) and their US dollar equivalent wherever possible. Unless otherwise indicated, the RMB–US\$ exchange rate used in this survey is US\$1= RMB6.5386, the rate on May 18 2016, the mid-point of the field research.



# Foreword

Tokyo

# Foreword

**It is with special pride that I present to you the 2016 edition of the Hotels.com Chinese International Travel Monitor (CITM). It is the fifth in the annual series, and thus marks a half decade of bringing you a comprehensive look at one of the most striking global phenomena: the growth of Chinese foreign tourism.**

Once again, the Chinese tourist tide has been rising, boosting and changing the tourist trade in virtually every corner of the world. Some 120 million Chinese traveled overseas in 2015, the year when the milestone of 100 million was first passed<sup>1</sup>. The China National Tourism Administration projects the figure will grow to 200 million annually by 2020.

A lot has changed since we started publishing the CITM! There were 50 million more Chinese travelers in 2015 than 2011, an increase of over 70 percent and more than the entire population of many countries<sup>1</sup>. In 2012, when the traveler numbers hit 83 million, China became the biggest outbound tourist market, surpassing Germany and the United States<sup>1</sup>.

Each year more foreign destinations have been added to the growing list of where the Chinese travel, and total spending has increased to US\$104.5 billion in 2015<sup>1</sup>. This has boosted tourism, the economy and jobs in countless countries. No wonder those destinations are working hard to make sure that Chinese travelers are well catered for, there are sufficient flights and visa barriers are loosened.

At the same time, our research for CITM 2016 reveals that there are demands from Chinese travelers not being met as quickly as they should be. So this report can serve as a useful reminder of how to service the Chinese traveler even better.

The behaviour of Chinese travelers has also changed enormously since we started publishing the CITM, according to our major survey of hoteliers. The top change was better English spoken by Chinese travelers, particularly as judged by hoteliers in the EMEA and Latin American regions. Chinese travelers, the survey revealed, were also increasingly looking for value for money, had higher expectations and were spending more.

One-size-fits-all perceptions of the Chinese as group tour travelers wanting only Chinese breakfasts and Mandarin translators are outdated. Our research shows that the industry needs to move decisively to develop new products and marketing strategies for the far more sophisticated Chinese travelers of today.

To help the industry cope with these more independent and diverse travelers, we are breaking new ground in CITM 2016. An analysis of our research data has revealed that Chinese travelers fall into one of five travel personas. The five personas open the way for targeted marketing to attract these segments and cater to their specific needs.

Whatever your involvement in tourism, we believe CITM 2016 is a powerful tool to understand and work most effectively with Chinese international travelers, one of the most powerful factor in world tourism. Happy reading.



**Abhiram Chowdhry**

Vice President  
and Managing Director APAC  
for the Hotels.com brand

<sup>1</sup> China National Tourism Administration



# 1 Market overview

Dongbaek Island

# Market overview

Chinese outbound travel is a global powerhouse, largely because of the sheer numbers and increasing spending power of Chinese tourists.

There is another factor behind this worldwide travel surge: the Chinese love travel. As this year's CITM has shown, two-thirds of outbound Chinese travelers consider travel to be an essential part of life – and are prepared to spend nearly a quarter of their income on travel.

Chinese travelers had to tighten their belts over the last 12 months due to the slowing economy. On average they spent 17 percent less per day in those twelve months than the previous year – from RMB3,324 (US\$508) to RMB2,849 (US\$436). Top spenders cut back by 68 percent, from RMB13,800 (US\$2,111) to RMB8,228 (US\$1,258). That meant the majority settling on three star rather than more luxurious hotels.

According to the survey, spending is expected to rebound in the next year, with one-third of travelers planning to spend more.

## Enormous potential

Despite a slowdown in the growth of Chinese overseas travel, the country's untapped potential is still enormous<sup>2</sup>. Only 5 percent of the nearly 1.4 billion Chinese hold passports, yet the country is already the top global spender. The expenditure is expected to equal Finland's GDP and exceed the size of the Greek economy in five years<sup>2</sup>.

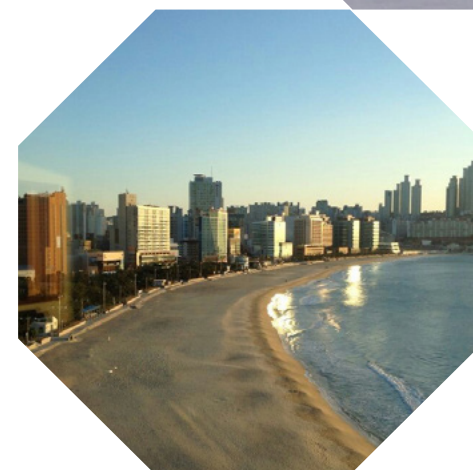
The pre-eminence of China in global travel was underlined by a report in 2016 from the United Nations World Tourism Organization, confirming that China was the leader in both number of tourists and the most money spent<sup>3</sup>.

A Forbes report at the end of last year showed that while China's GDP had been slowing for three years, China's outbound tourism had registered double that growth rate for each of those years, "confirming the resilience of the demand for travel beyond the borders of Mainland China in an impressive way<sup>4</sup>".

<sup>2</sup> [www.chinatravelnews.com/article/90046](http://www.chinatravelnews.com/article/90046)

<sup>3</sup> [www.chinadaily.com.cn/china/2016-01/28/content\\_23288004.html](http://www.chinadaily.com.cn/china/2016-01/28/content_23288004.html)

<sup>4</sup> [www.forbes.com/sites/profdrwolfganggarlt/2015/12/30/2015-year-of-resilient-growth-and-further-segmentation-of-chinas-outbound-tourism/#45fc31061d46](http://www.forbes.com/sites/profdrwolfganggarlt/2015/12/30/2015-year-of-resilient-growth-and-further-segmentation-of-chinas-outbound-tourism/#45fc31061d46)



## Five Chinese traveler personas revealed

One of the most exciting aspects of CITM 2016 is a comprehensive analysis of data revealing that Chinese travelers can be divided into five distinct personas depending on their background, travel attitudes, preferences and behaviors. This is the first time this analysis has been included in CITM.

This year's CITM contains a full breakdown of the five travel personas, and how they differ. The analysis allows hotels and destinations to evolve and diversify their offerings to meet current and future demands of Chinese travelers.



### Detailed explorers

Mostly born in the 60s and 70s, are innovative and optimistic, like to learn and explore, and tend to plan their trips down to the last detail.



### Cautious connectors

Most likely born in the 60s and 70s. They are responsible family people and travel to bond with loved ones. They likely come from lower-tier cities and prefer safe, family-friendly hotels.



### Experience seekers

Tend to have been born in the 80s and 90s and be from top-tier cities. They like stylish hotels and professional advice on local cultural activities. Experience seekers travel for enriching experiences, are independent and ambitious.



### Indulgers

Mostly born in the 80s, they travel to indulge themselves and to demonstrate their power. They stay at higher-star hotels and go on adventurous local tours.



### Basic pleasure seekers

Millennials born in the 90s and unlike the other groups, more of them are women than men. They are aesthetically minded and travel for non-material enjoyment, seeking value-for-money accommodation.

More information on the Chinese traveler personas can be found on [page 30](#).

## Challenges and opportunities

The two biggest challenges facing those providing accommodation to Chinese travelers are a lack of Mandarin-speaking staff and of China UnionPay card facilities. These are not only the most important services demanded by Chinese travelers, according to the survey, but seen as areas in pressing need of improvement.

CITM shows that the top spenders are more sophisticated than the average, valuing experience (comfort, star rating, facilities and hotel services) above price.

Most Chinese travel with friends and family, with nearly half taking their children. Only a small proportion of travelers have a backpacking experience.

Short-haul countries were most popular with Chinese travelers in the past twelve months, with South Korea ranking first, followed by Japan, Hong Kong/Macau, Taiwan and Thailand.

But the future seems set for a mixture of short and long haul destinations, with Australia number one in the travelers' wish lists, followed by Japan, Hong Kong, South Korea and the Maldives.

Over half the travelers to Japan had been there before. Shopping, visiting historical and heritage sites and safety were the key reasons for its popularity.

When planning their next trip, Chinese travelers are particularly taking into account safety, sightseeing, dining and ease of visa applications, with the currency of the intended country not generally a factor.



# ② A holistic look at outbound Chinese travelers



## Where to go

Outbound travelers typically make trips of more than 5 days, and the vast majority (92 percent) like to visit lots of new destinations rather than return to old places.

**Chinese are big travelers, having made on average two international trips in the last 12 months.**

According to hotel room demand on the Hotels.com China website, the most popular countries for Chinese travelers to visit in the last two years were the USA followed by Thailand. In 2015, Japan overtook Hong Kong in third spot and Australia climbed from eighth most visited to sixth on the list. In terms of cities, Hong Kong followed by Bangkok remained the top two from 2014 to 2015. Tokyo climbed from the ninth to fourth most visited city from 2014 to 2015 and Chiang Mai entered the top ten list in 2015.

**Most popular countries/regions for Chinese travelers according to Hotels.com China website**

	2014	2015
1	United States of America	United States of America
2	Thailand	Thailand
3	Hong Kong	Japan
4	Japan	Hong Kong
5	Taiwan	Taiwan
6	South Korea	Australia
7	France	South Korea
8	Australia	France
9	Italy	Italy
10	United Kingdom	United Kingdom

**Most popular cities for Chinese travelers according to Hotels.com China website**

	2014	2015
1	Hong Kong	Hong Kong
2	Bangkok	Bangkok
3	Taipei	Phuket
4	Phuket	Tokyo
5	Seoul	Taipei
6	New York	Las Vegas
7	Las Vegas	New York
8	Los Angeles	Seoul
9	Tokyo	Los Angeles
10	Singapore	Chiang Mai

When it comes to a wish list of countries to visit in the next 12 months, Australia came out number one at 15 percent. Also high on the intended travel list were Japan, Hong Kong, South Korea and the Maldives.

Again, there were significant changes between this and last year. While Australia and Japan were still the top two, France dropped from third to ninth. And the USA, having been number 6 last year, disappeared from this list too.

### Chinese traveler wish list for the year ahead

Ranking	Destinations	
1	Australia	15%
2	Japan	13%
3	Hong Kong	11%
4	South Korea	7%
5	Maldives	6%
6	Thailand	4%
7	Singapore	4%
8	Macau	4%
9	France	3%
10	Taiwan	3%





Average hotel prices per room per night paid by Chinese travelers in global destinations in 2015 compared with 2014 in RMB.

The biggest percentage price falls in 2015 compared with 2014 in RMB.

City	2014 Average (RMB)	2015 Average (RMB)	% Change
Bali	1,274	928	-27%
Istanbul	815	602	-26%
Moscow	929	706	-24%
Kota Kinabulu	643	509	-21%
Seoul	862	683	-21%
Kuala Lumpur	561	448	-20%
Frankfurt	1,149	923	-20%
Okinawa	1,133	922	-19%
Paris	1,517	1,241	-18%
Hong Kong	1,044	879	-16%

Source: Hotels.com Hotel Price Index 2014 and 2015

## Destinations that the Chinese travelers paid the most for 2015

City	2014 Average (RMB)	2015 Average (RMB)	% Change
Honolulu	1,706	1,625	-5%
New York	1,682	1,608	-4%
London	1,643	1,565	-5%
Dubai	1,660	1,469	-12%
Boston	1,367	1,448	6%
San Francisco	1,340	1,430	7%
Miami	1,337	1,418	6%
Seattle	1,241	1,298	5%
Milan	1,449	1,266	-13%
Paris	1,517	1,241	-18%

Source: Hotels.com Hotel Price Index 2015

## Destinations that the Chinese travelers paid the least for 2015

City	2014 Average (RMB)	2015 Average (RMB)	% Change
Phuket	553	522	-6%
Jakarta	554	519	-5%
Ho Chi Minh City	546	513	-6%
Kota Kinabalu	643	509	-21%
Pattaya	524	486	-7%
Bangkok	480	469	-2%
Kaohsiung	513	463	-10%
Kuala Lumpur	561	448	-20%
Siem Reap	485	443	-9%
Chiang Mai	443	429	-3%

Source: Hotels.com Hotel Price Index 2015

## What draws Chinese travelers to different countries

When it comes to ranking countries in terms of attractions, Australia came top of the list ahead of Japan and Hong Kong. However Hong Kong was the number one choice for shopping, followed by Japan and South Korea.

Japan was first choice for local gastronomy, while the Maldives come first for resort and beach destinations, with Australia coming second and Japan third. Australia was the number one choice for both backpacking and adventure, and Japan for exploring local culture, followed by Australia and India.

### Popular Destinations for Sightseeing

Destination		
1	Australia	14%
2	Japan	12%
3	Hong Kong	8%
4	Maldives	8%
5	South Korea	5%
6	Singapore	4%
7	Thailand	4%
8	Macau	4%
9	Malaysia	4%
10	France	3%

### Popular Destinations for Shopping

Destinations		
1	Hong Kong	25%
2	Japan	21%
3	South Korea	12%
4	Australia	5%
5	Macau	5%

### Popular Destinations for Local Gastronomy

Destinations		
1	Japan	16%
2	Hong Kong	13%
3	South Korea	10%
4	Taiwan	7%
5	Australia	6%

### Popular Destinations for Resort / Beach

Destinations		
1	Maldives	17%
2	Australia	13%
3	Japan	7%
4	Fiji	6%
5	Hong Kong	6%

### Popular Destinations for Backpacking

Destinations		
1	Australia	10%
2	Hong Kong	9%
3	Japan	8%
4	Cambodia	6%
5	Macau	5%

### Popular Destinations for Adventure

Destinations		
1	Australia	11%
2	Cambodia	6%
3	Japan	4%
4	India	4%
5	Nepal	3%

### Popular Destinations for Local Culture Exploration

Destinations		
1	Japan	9%
2	Australia	8%
3	India	7%
4	Cambodia	5%
5	Brunei	4%

Japan is the only country that ticks every attraction box for Chinese travelers, from sightseeing to shopping and adventure. It is the only destination that can tick the “must-visit in a lifetime” box. Australia comes next, ticking every box except the must-visit criteria.

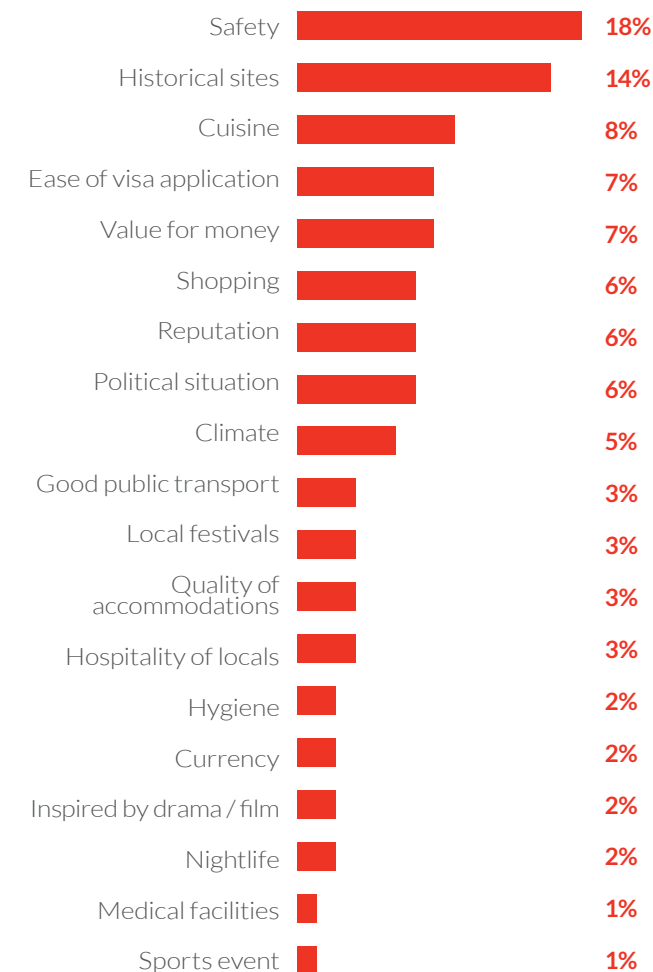
Likely as result of this, Japan is particularly popular with Chinese travelers for repeat visits, with over half the outbound travelers (54 percent) having been there more than once.

Countries and attractions of interest to Chinese travelers

	Korea	Japan	India	Australia	Thailand	Malaysia	Taiwan
Next visit	✈	✈		✈	✈		
Sightseeing	✈	✈		✈	✈	✈	
Shopping	✈	✈		✈	✈		
Gastronomy	✈	✈		✈	✈	✈	✈
Resort	✈	✈		✈	✈	✈	
Backpacking		✈	✈	✈		✈	✈
Adventure		✈	✈	✈			
Explore culture	✈	✈	✈	✈	✈		
Must-visit in a lifetime		✈					

When Chinese travelers weighed up their travel options, safety, historical sites and cuisine topped the list, but ease of visa application came a close fourth.

Most considered options to Chinese travelers when selecting a destination



The number one choice of landmarks people felt they should visit in their lifetime was the Pyramids of Giza in Egypt, picked by 18 percent. Just behind was Japan's Mount Fuji, and third was Venice, Italy. The Great Sphinx in Egypt, the Palace of Versailles in France and the Himalayas also scored well.



When it comes to the countries seen by Chinese travelers as the most welcoming, Japan, South Korea and Hong Kong came out tops.

#### Most Welcoming Chinese Travelers

Destination		
1	Japan	12%
2	South Korea	11%
3	Hong Kong	8%
4	Australia	8%
5	Thailand	5%
6	France	5%
7	Maldives	4%
8	Brazil	3%
9	USA	3%
10	Singapore	2%

# A holistic look at outbound Chinese travelers

## Spending power

The Chinese are among the biggest spenders on tourism. Outbound travelers spend RMB22,592 (US\$3,455) on travel a year – almost a quarter of their income. Young millennials (born in the 90s) spent the highest proportion of all, 27 percent, just ahead of the 26 percent spent by those born in the 60s.

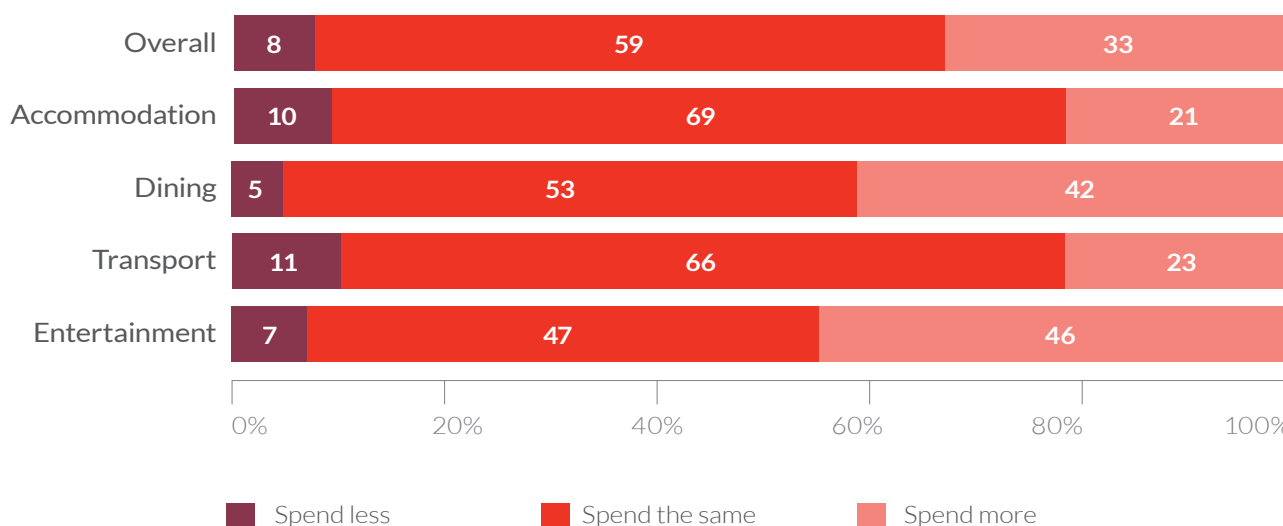
Overall, travel spending dropped an average of 17 percent from the previous twelve months. The top spenders spent three times more than the average traveler, despite having tightened their belts spectacularly, down 68 percent.

But the future looks promising, with one-third of travelers expecting to spend 30 percent more in the coming year, particularly on dining and entertainment.

### Chinese traveler spending compared to income:

	Overall	Born Post 90s	Born Post 80s	Born Post 70s	Born Post 60s
Share of travel expense to income	24%	27%	20%	20%	26%
Annual personal income	¥95,527 [US\$14,610]	¥70,492 [US\$10,781]	¥98,923 [US\$15,129]	¥107,092 [US\$16,378]	¥114,754 [US\$17,550]
Travel expense in the past 12 months	¥22,592 [US\$3,455]	¥19,288 [US\$2,950]	¥19,678 [US\$3,010]	¥21,427 [US\$3,277]	¥29,926 [US\$4,577]

### Chinese traveler spending changes in the past 12 months:





Top spenders rated comfort, star rating and facilities highly when choosing accommodation, and reputation and brand were more important to them than the average traveler. Safety was rated highly by both top spenders and average travelers, but slightly more so by the latter, for whom this was the most important factor of all. As might be expected, price was more important to average travelers than the top spenders.

## Important factors to Chinese travelers when choosing accommodation abroad:

		Overall	Top spender
Safety		14%	12%
Comfort / star rating / facilities		14%	17%
Price		9%	6%
Reputation / brand		8%	11%
Easy access to transport		7%	7%
Hotel services		7%	8%
Location		6%	5%
Restaurant		5%	6%
Mandarin speaking staff		5%	5%
Review from other travelers		5%	5%
Friends / family / colleagues		4%	4%
Travel review sites		4%	4%
Free wi-fi		3%	3%
Free breakfast		2%	3%
Eco friendly		2%	1%
Room size		2%	2%
Design		2%	2%
Newness		1%	1%

The travelers spent their non-hotel money mainly on shopping, dining and sightseeing. The biggest expenditure at hotels was on onsite restaurants and shops.



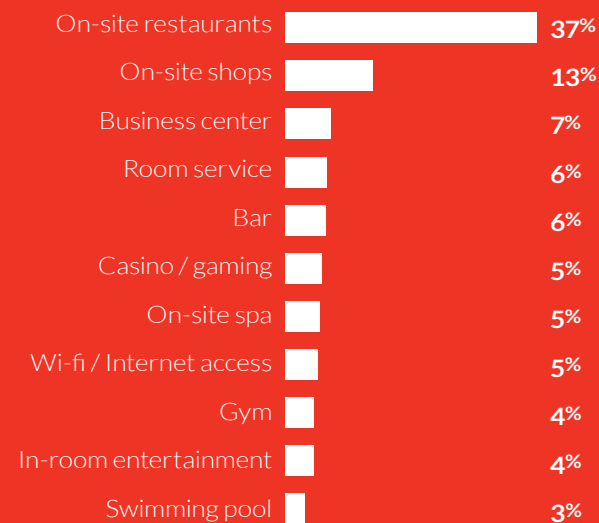
## LOCAL EXPENSE

Average spend per day:  
¥ 1,999 [US\$306]



## HOTEL EXPENSE

Average spend per day:  
¥ 850 [US\$130]



**TOTAL**  
¥ 2,849 [US\$436]

## Hotel preferences

Chinese travelers prefer to stay in hotels, and do not like them to be below three stars: 78 percent prefer three stars or more, despite the economic downturn.

As for the style of hotel preferred by Chinese travelers, 25 percent wanted hotels that catered specifically for their needs, and 67 percent said they preferred such hotels but would consider others – so personalization is seen as desirable but not essential.

CITM 2016 confirms that powerful trends like the rise of millennial travelers and mobile commerce are still very much in evidence.



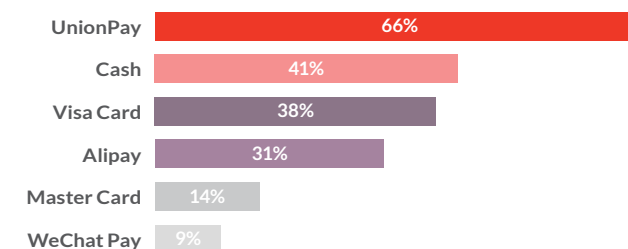
## Urgent need for new products and services

As Chinese travelers become more sophisticated, hotels need to increase the rate at which they provide new services. While safety, comfort, star rating, facilities and price are still top of the list of important factors, they dropped each five percent on the previous year.

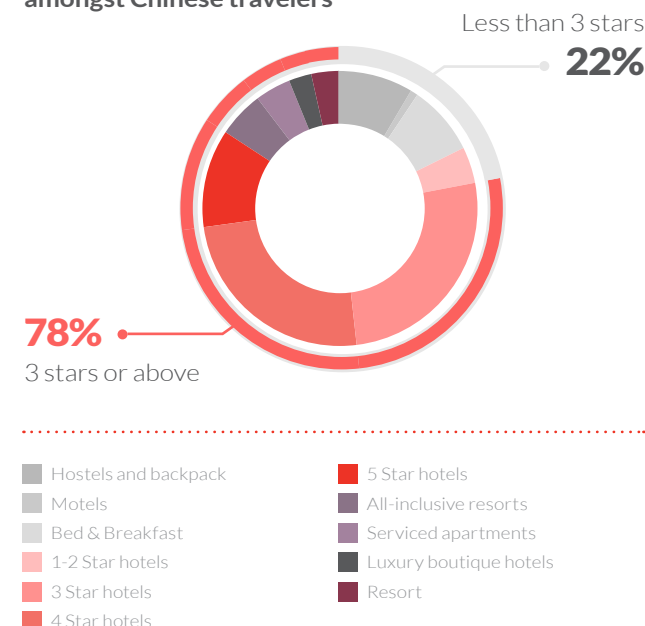
Chinese travelers had a number of other demands for services that were listed as being not only important but greatly in need of improvement, including UnionPay facilities, Chinese restaurants on-site, Mandarin-speaking staff and app-based customer service.

UnionPay is by far the most preferred means of payment, listed by 66 percent of respondents.

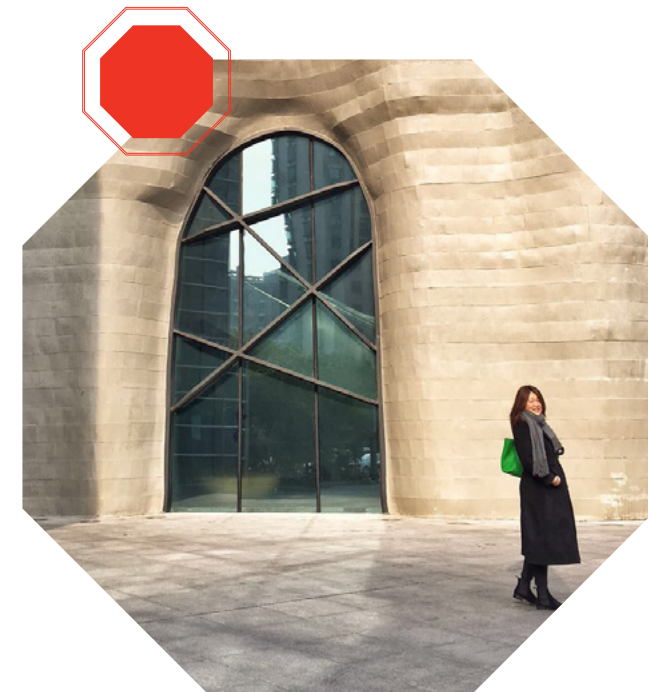
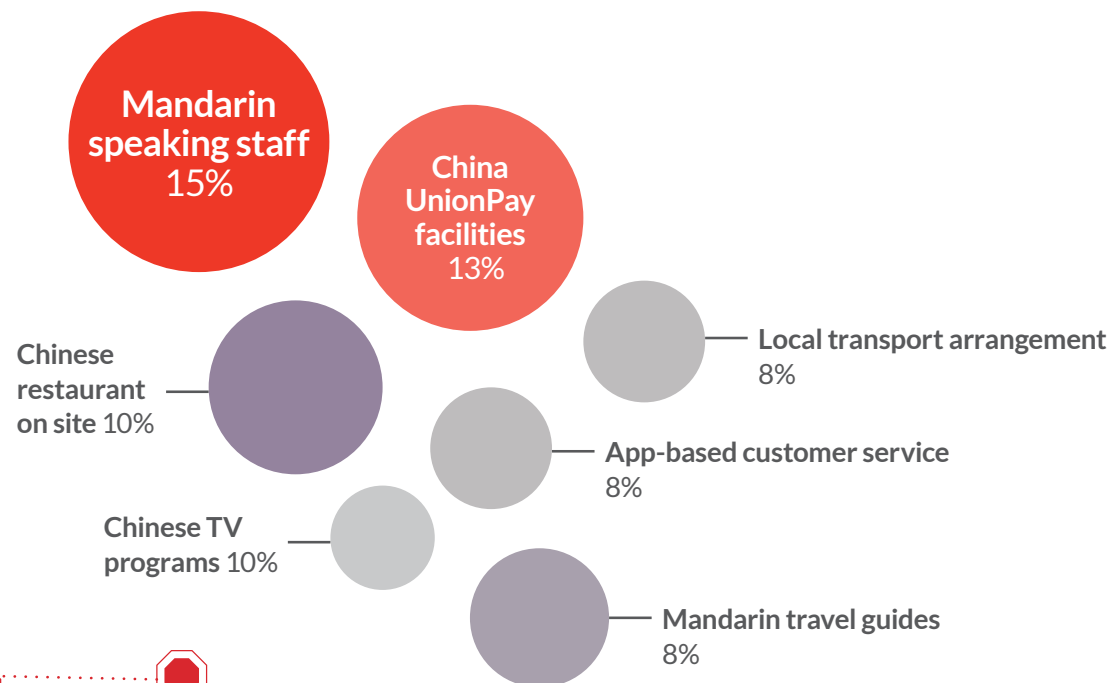
### Preferred payment method amongst Chinese travelers



### Preferred class of accommodation amongst Chinese travelers

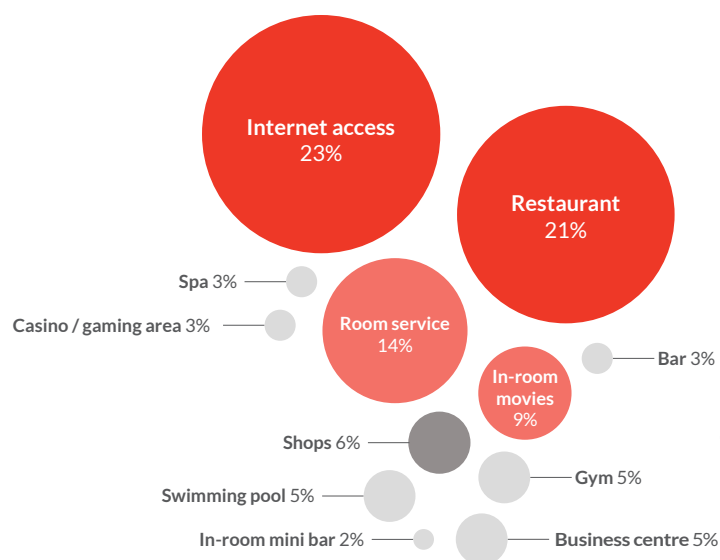


## Services that are important to Chinese travelers but need improvement



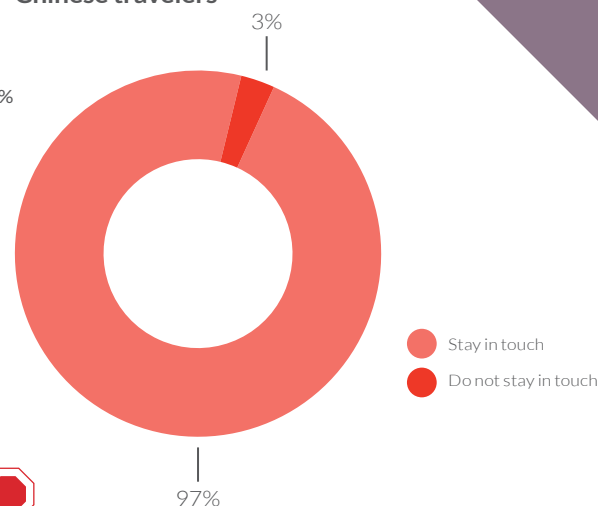
When travelers were asked to name the three most important hotel facilities, the top-ranked was wi-fi internet access (23 percent) – again underlining the growing influence of digital travelers – followed by on site restaurants (21 percent) and room service (14 percent). This is the first time wi-fi access has been in the number one slot.

### The most important hotel facilities to Chinese travelers

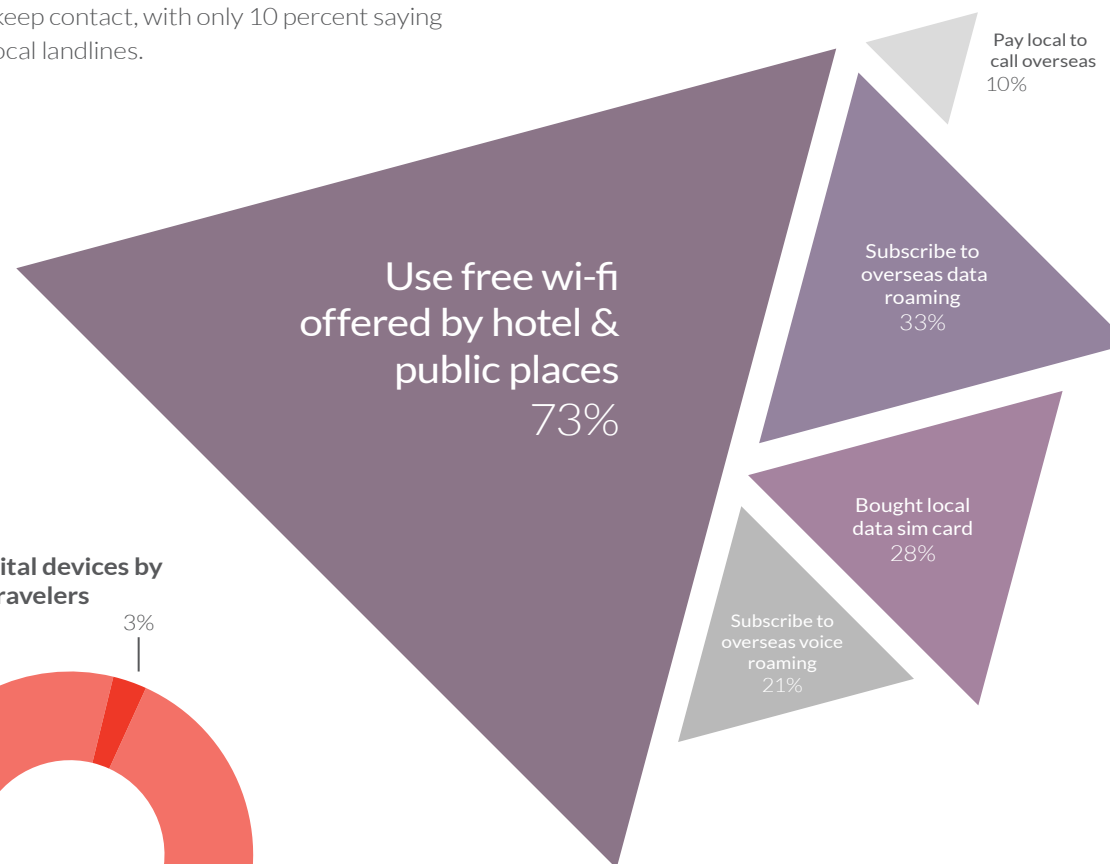


Internet access was considered so important because almost all travelers stay in touch with family and friends while abroad, and the top mode of contact is free wi-fi at hotels or public places (listed by 73 percent). With Chinese travelers now truly digital, they also used mobiles to keep contact, with only 10 percent saying they used local landlines.

### Use of digital devices by Chinese travelers

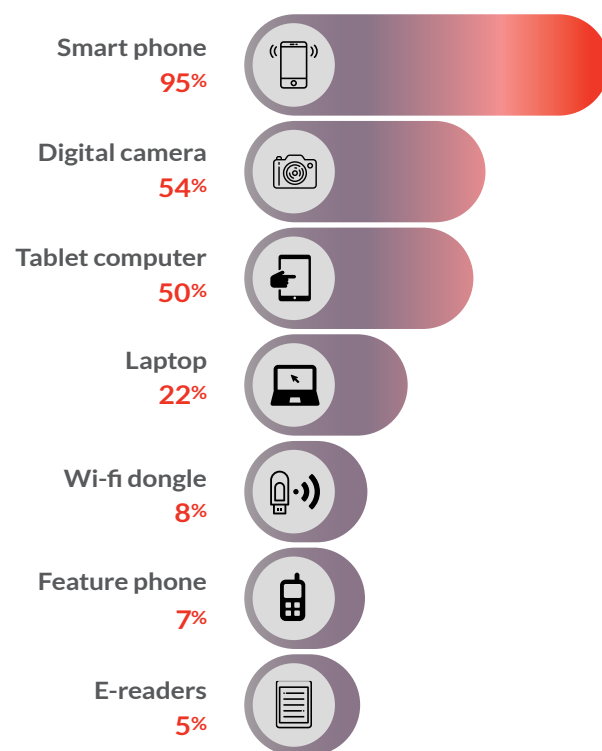


### How Chinese travelers enable modes of contact whilst abroad



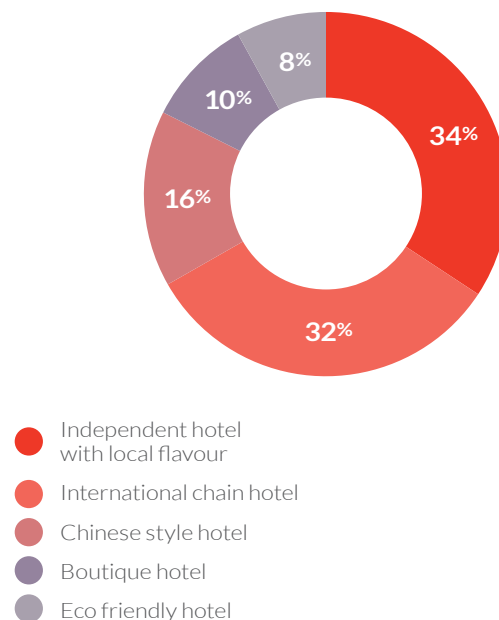
Virtually every Chinese traveler (99 percent) carries digital equipment to keep in touch, take photos and videos, and search for travel information. Ninety five percent carry smart phones; 54 percent have digital cameras and video cameras; and 50 percent have tablet devices. Fewer are taking digital cameras, we assume due to improved smart phone technology.

### Type of digital equipment used by Chinese travelers



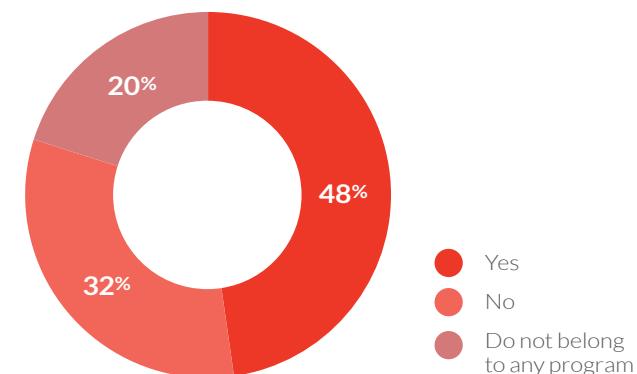
Altogether, 34 percent preferred independent hotels with local flavour, 32 percent international chain hotels, and 16 percent Chinese-style hotels.

### Type of hotels preferred by Chinese travelers

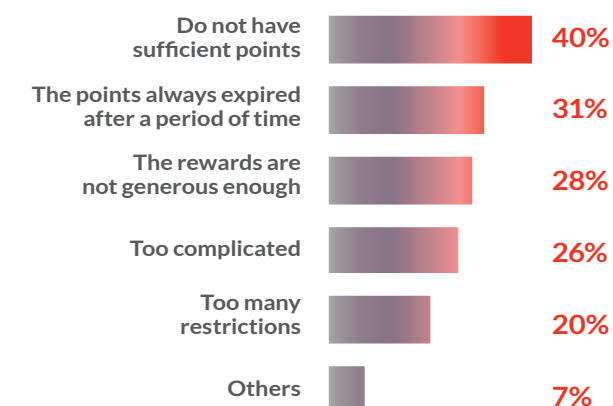


Eighty percent of the travelers are loyalty program members, with around half of them (48 percent) having used loyalty points in previous bookings. But another 32 percent did not use their loyalty points because of a number of pain points, such as not having enough points (40 percent), points expiring before they could be used (31 percent) and the rewards not being generous enough (28 percent).

### Percentage of Chinese travelers with hotel loyalty programs



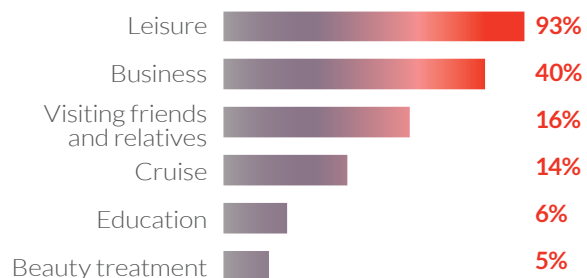
### Reasons for not using loyalty points



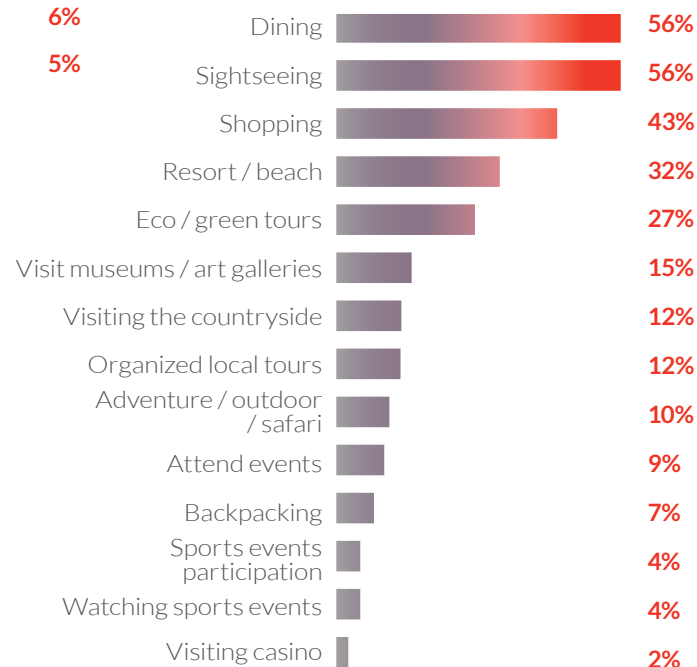
Leisure was overwhelmingly the main reason for travel, with 93 percent giving this as a reason for traveling in the last twelve months. Business followed at 40 percent, while 16 percent mentioned visiting friends and relatives.

When travelers were asked for their three main activities when traveling abroad, dining and sightseeing came out on top, followed by shopping. Visiting casinos ranked lowest at 2 percent. Eco/green tours are growing in popularity, being ranked fifth in activities and up 7 percent from the previous year.

### Purposes of travel amongst Chinese international travelers

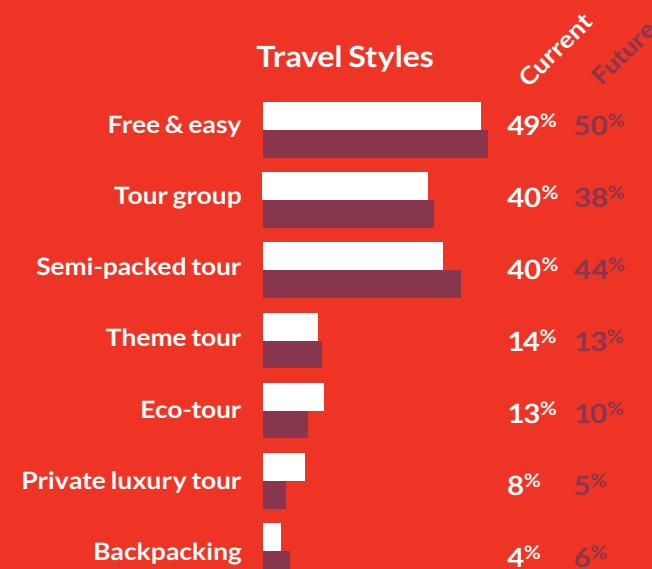


### Main activities amongst Chinese travelers when abroad



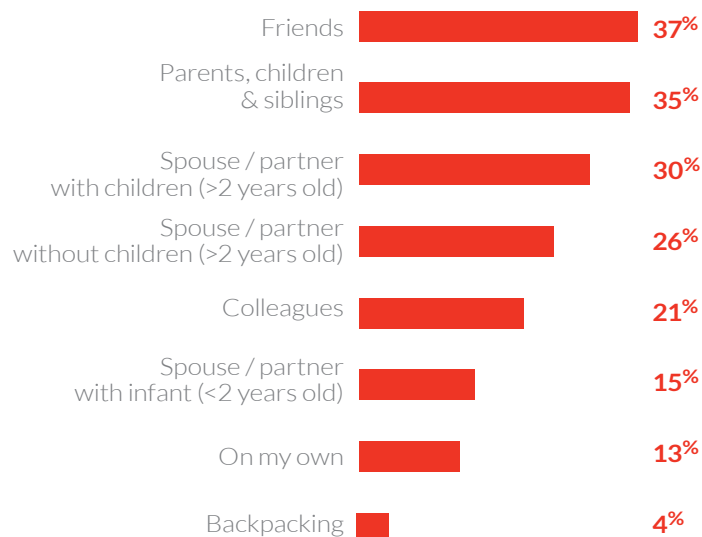
When it came to how people traveled in the last year, almost half (49 percent) said independent travel; 40 percent with a tour group and 40 percent with a semi-packaged tour. Although tour group travel was up 6 percent on the previous year, the trend still appears to be in the direction of greater independence, with slightly more people saying they would like to travel independently or in a semi-packaged tour group in the future, and slightly fewer with a tour group.

Backpacking was the least popular travel style, with only 4 percent selecting this – though 6 percent are looking to this for the future.



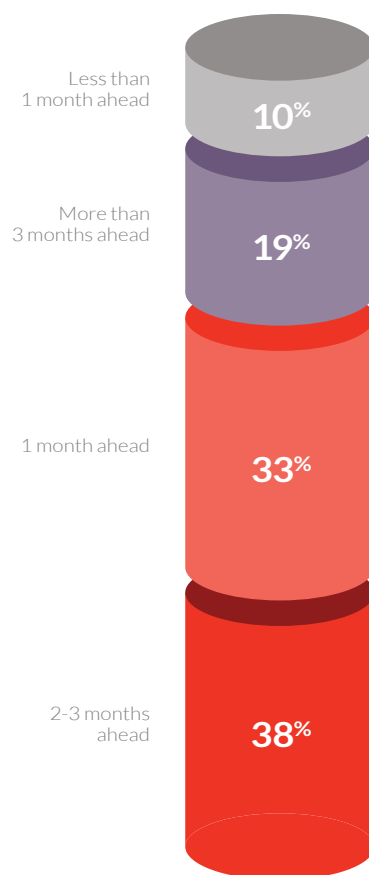
Chinese travelers like to travel with family and friends: 37 percent said they usually traveled with friends, 35 percent with parents, children and siblings (this was down 5 percent on the previous year), 30 percent with children and 15 percent with infants. Traveling with infants is likely to increase in coming years, with the dropping of the one-child policy. Only 13 percent said they preferred to travel alone.

#### Preferred travel companions



When it comes to planning travel, Chinese travelers spend on average 11 days performing online research, and tend to plan their trips well ahead. Only 10 percent planned less than a month ahead, 38 percent two to three months ahead, and 19 percent planned more than three months ahead.

#### Time spent planning ahead of actual travel



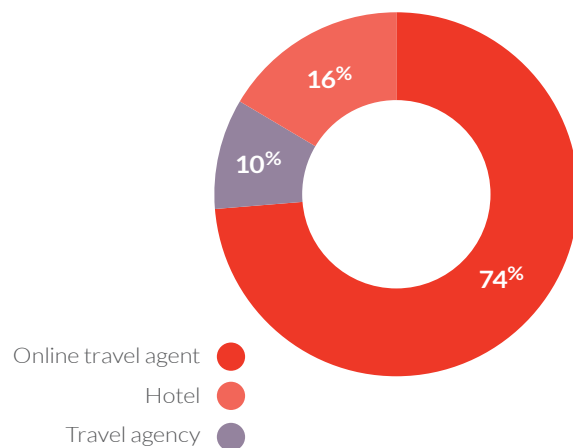
The most popular source of travel information they used was online accommodation sites, and friends and colleagues, each named by 44 percent of those surveyed. Nearly as important were online review sites and travel guides. Social media as a source of travel information was up 6 percent on the previous year.

#### Source of travel information



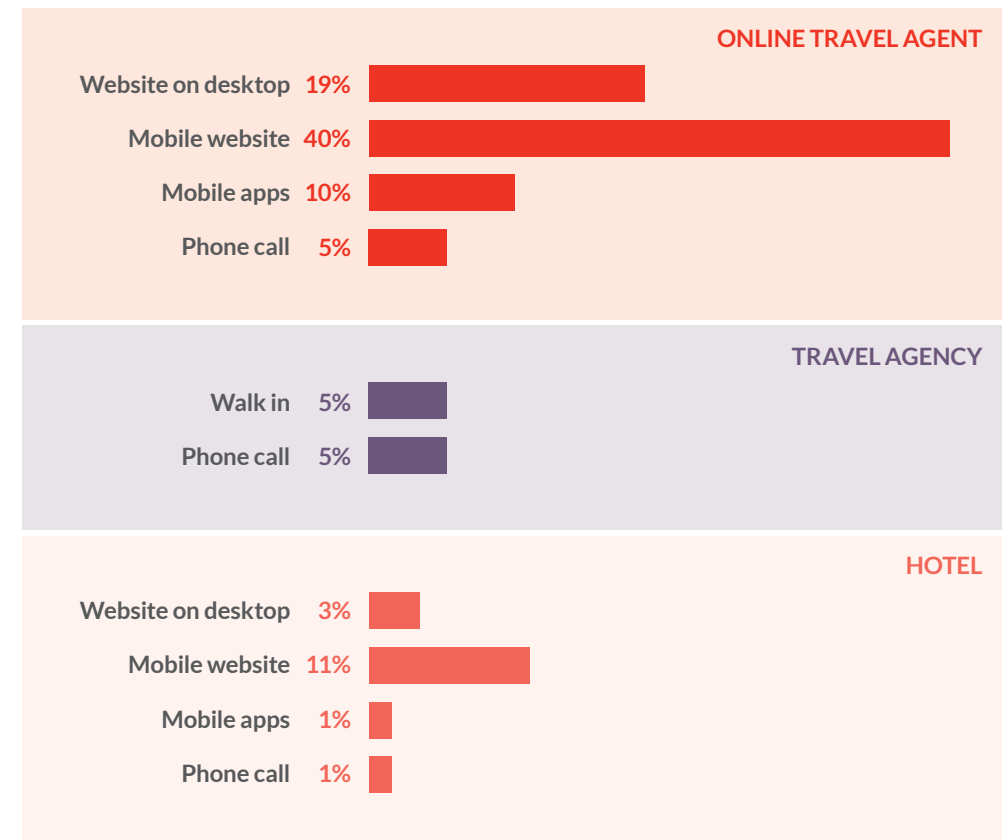
When it came to booking, the swing to digital and mobile, and the decline of conventional travel agencies, was still very much in evidence. Only 10 percent used conventional travel agencies, while 74 percent used online travel agencies. Over 62 percent of bookings were made via mobile according to those surveyed, with booking via mobile up 10 percent on the previous year's survey.

### Preferred booking channels amongst Chinese travelers



The increased use of online research and booking methods in part reflects the growing sophistication of the Chinese traveler in comparing costs.

### Preferred booking mode amongst Chinese travelers



# 3 Profiles of the types of different Chinese travelers



# Five Chinese traveler personas

As Chinese travelers grow in affluence and sophistication, the stereotypical picture of them has fragmented. For the first time, CITM has divided Chinese travelers into five unique travel personas, helping to change perceptions and allow hotels and destinations to tailor their marketing and diversify their offerings.

The research showed that every traveler fits into one of these five personality types, each with their own fundamentally different approach to travel.

Ipsos determined the personas by using factor analysis to detect patterns in the responses of the travelers to a number of questions about their values. The result: vivid portraits of five different types of Chinese traveler.

By taking into account these very different types of Chinese traveler, and particularly which segment is growing fastest, the industry will be well-placed to plan for the future.

The situation is dynamic. For instance, the largest segments are currently detailed explorers and cautious connectors, but the segment with the highest predicted growth, and therefore the one to watch, is experience seekers. This is a high-yield group, with high spending.



Detailed explorers



Cautious connectors



Experience seekers



Indulgers



Basic pleasure seekers



"With my quality of life rising, travel has become a necessary requirement and enhances my general life and wellbeing. When I travel, I want to explore every corner of each destination I visit."

## Detailed explorers

A quarter of travelers fall into this category, making it one of the two largest groups.

People in this category respond positively to statements like "One should never be content but constantly explore new ideas" (innovation); "It's important to push the limits and reach new heights" (ambition) and "I understand the power and potential of free thinking" (independence).

Detailed explorers see travel as a necessary element of life, a journey of learning and exploring and an exhilarating experience.

Their preference is for free and easy travel and semi-packaged tours. Shopping and sightseeing are their favorite activities. Their source of travel information tends to be online travel and review sites, and travel magazines. They particularly value safety, easy access to transport and hotel services.

**Detailed explorers tend to be affluent, and to be born in the 60s and 70s.**



Prefers 3-star & 4-star accommodation



### Key Values in Life

- Innovation
- Visionary
- Optimism
- Aesthetics
- Empowerment
- Ambition



### Demographics

**Age:** Skews toward post 60s-70s, non-millennials

**Personal income:** Skews toward mid to high



### Related to Travel

#### Meaning of travel

- A necessary element in life
- Exhilarating experience
- Learning and exploration journey

#### Main activities

- Shopping
- Sightseeing

#### Travel method

- Free & Easy (I prefer to make my own travel arrangements)
- Semi-packaged tour, with few days doing free activities

#### Average daily expenses

¥2,900 [US\$444]

#### Destinations for activities



Hong Kong



Japan



South Korea



Australia



Maldives



### Related to Hotel Selection

#### Source of info for hotel

- Travel magazines/ brochures
- Online accommodation/ travel website
- Online review sites (e.g. TripAdvisor)

#### Consideration factors

- Hotel services (such as housekeeping, front line staff services)
- Reviews of travelers who stayed at the hotel
- Safety of area

#### Style of accommodation

- International chain or independent local hotels



"It doesn't matter where I go or where I stay, what is most important to me is traveling with my family. When we travel we make many precious memories and I plan special itineraries which are suitable for adults and kids so we can experience destinations together."

## Cautious connectors

This group makes up 25 percent of travelers, the largest group along with detailed explorers.

They respond positively to statements like "I am safe and play within the rules" (integrity); "I am making more effort to reduce my impact on society and the environment" (responsibility); and "balance of different aspects of life is the true sign of my success" (wholesome lifestyle).

They were born mainly in the 60s and 70s. Their proportion of annual travel spending to income is one of the highest, at 31 percent.

For cautious connectors, travel is more than anything about joyful moments with friends and golden moments with family. Theme tours and eco-tours particularly appeal to this group. Dining and shopping are their most popular activities. They tend to get their travel information from a combination of online review sites, social media, travel magazines and newspapers.

When it comes to selecting accommodation, these travelers particularly consider easy access to transport, reviews by previous travelers, free wi-fi, free breakfast, and eco friendly.



Prefers 3-star accommodation



### Key Values in Life

- Integrity
- Family
- Humanity
- Responsibility
- Wholesome lifestyle



### Demographics

**Age:** Skews toward post 60s-70s, non-millennials

**City of Origin:** Skews toward tier 3 & 4 cities

**Personal income:** Skews toward low to middle



### Related to Travel

#### Meaning of travel

- Joyful moments with friends
- Family golden moments

#### Average daily expenses

¥2,600 [US\$398]

#### Main activities

- Shopping
- Dining
- Sightseeing

#### Travel method

- Eco-tours
- Theme tour (e.g. golf, diving, spa, safari)

#### Destinations for activities



Hong Kong



Japan



South Korea



Taiwan



Thailand



### Related to Hotel Selection

#### Source of info for hotel

- Online review sites (e.g. TripAdvisor)
- Travel magazines/brochures

#### Consideration factors

- Free wi-fi
- Easy access to public transport
- Free breakfast (or included in room rates)
- Eco friendly

#### Style of accommodation

- Independent local hotels



"My true passion is to experience destinations while I am young, which can offer me something different when I am traveling solo. I choose to be a backpacker as it makes me feel free and easy – providing me with more time to deeply experience and understand local cultures."

## Experience seekers

At 17 percent, this is the second smallest group. They tend to be young millennials. Their daily holiday spending is the second highest at RMB3,000 (US\$459).

People in this group respond positively to statements like "I think I am right, I don't worry about what other people think" (individuality); "I am willing to take risks because I believe in myself" (ambition); and "I have my own way of seeing the world – and feel the need to go my own way" (independence).

Traveling for them is exhilarating and an escape from reality. They prefer free and easy travel, private luxury tours and theme tours. Their main activities are local tours, backpacking and attending events like theaters and concerts.

Experience seekers get their travel information primarily from travel guides and magazines and promotions/deals. When booking accommodation, they look particularly at room size, design and newness.



Prefers 4-star & 5-star accommodation



### Key Values in Life

- Individuality
- Ambition
- Independence



### Demographics

**Age:** Skews toward post 80s-90s, millennials

**City of Origin:** Skews toward tier 1 & 2 cities

**Personal income:** Skews toward mid to high

**Lovers of SOLO Travel**



### Related to Travel

#### Meaning of travel

- Getaway from reality
- Step out of a comfort zone
- Exhilarating experience

#### Main activities

- Organised local tours
- Backpacking
- Attend events

#### Travel method

- Free & easy (prefers to make own travel arrangements)
- Private luxury tours
- Theme tour (e.g. golf, diving, spa, safari)

#### Average daily expenses

¥3,000 [US\$459]

#### Destinations for activities



Hong Kong



Japan



Australia



India



Egypt



### Related to Hotel Selection

#### Source of info for hotel

- Travel guides

#### Consideration factors

- Room size
- Newness
- Design

#### Style of accommodation

- International chain or independent local hotels



## Indulgencers

**Indulgencers form only 12 percent of all travelers and therefore the smallest segment.**

They respond positively to statements like “I value being recognized as someone accomplished with leadership power and influence” (power and influence); “Being able to fully indulge myself is a sign of my success and superiority over others” (indulgence); and “Success comes to those who show dedication and hard work” (perseverance).

They tend to be millennials and their biggest interest in travel is stepping out of their comfort zone. They go for theme tours and private luxury tours. Their main activities are local tours and taking part in sports. Friends and colleagues, travel guides and family are their main sources of travel information.

When selecting accommodation abroad, they particularly consider comfort/star rating/facilities, hotel services and room size. Their average daily spend of RMB3,100 (\$474USD) is the highest of all the traveler types, reflecting the fact that as a group they are affluent.



Prefers 5-star accommodation & all inclusive resorts



*“I lead a very busy work life so when I travel I like to indulge and spoil myself. When I have the time to travel, I seek tranquil destinations such as luxurious Islands where I can escape from the crowd. I also like to explore destinations which offer outdoor activities and sports to release the tensions of day to day life and slow down my pace.”*



### Key Values in Life

- Power & influence
- Recognition
- Indulgence



### Demographics

**Age:** Skews toward post 80s, millennials

**Personal income:** Skews toward high



### Related to Travel

#### Meaning of travel

- Step out of a comfort zone

#### Average daily expenses

¥3,100 [US\$474]

#### Main activities

- Taking part in sports (e.g. skiing, sailing, golfing)
- Organised local tours
- Adventure/outdoor/safari

#### Travel method

- Theme tour (e.g. golf, diving, spa, safari)
- Private luxury tours

#### Destinations for activities



Australia

Japan



Cambodia

Hong Kong



India



### Related to Hotel Selection

#### Source of info for hotel

- Travel guides
- Friends and colleagues
- Family

#### Consideration factors

- Room size
- Hotel services (such as housekeeping, front line staff services)
- Comfort/star rating/facilities offered

#### Style of accommodation

- International hotel chain



"Travel to me is simple and precious. It provides the opportunity to get away from reality and create joyful moments and memories with friends and family. When I travel with my friends, I don't have specific plans as this allows us freedoms to adapt easily."

## Basic pleasure seekers

This group makes up 21 percent of travelers. Unlike the other types, which consist pretty much equally of men and women, 57 percent of this group is female. They tend to be young millennials, born in the 90s.

They respond positively to statements like "Slowing down my life pace makes me the happiest" (simplicity); "For me how things look is just as important as what they can do" (aesthetics); and "Comfort is knowing one has made the right decision" (contentment).

The proportion of their expenditure on travel to income is the highest of all the personas at a massive 37 percent. Travel to basic pleasure seekers is an escape from reality and their comfort zone, and to seek golden family moments.

Their main preferences are for group and semi-packaged tours and their favorite activities are attending events and taking part in sports.

They tend to get their travel information from friends, colleagues and family. The principal factors they consider when selecting accommodation are reputation/brand, reviews by previous travelers, friends, family and colleagues and review sites.



Prefers economical options including 1-2 star hotels, B&Bs, motels, hostels and backpackers



### Key Values in Life

- Simplicity
- Aesthetics
- Contentment



### Demographics

**Gender:** Skews toward female

**Age:** Skews toward post 80s, millennials



### Related to Travel

#### Meaning of travel

- Getaway from reality
- Family golden moments
- Step out of a comfort zone
- Joyful moments with friends

#### Average daily expenses

¥2,700 [US\$413]

#### Main activities

- Attend events (theatre, concerts, musicals)
- Taking part in sports (e.g. skiing, sailing, golfing)
- Watching sports events (e.g. F1, World Cup, Premier League)

#### Travel method

- Tour group, follow the tour guide during entire trip
- Semi packaged tour, with few days doing free activities

#### Destinations for activities



Australia



Japan



Cambodia



India



Myanmar



### Related to Hotel Selection

#### Source of info for hotel

- Family
- Friends and colleagues

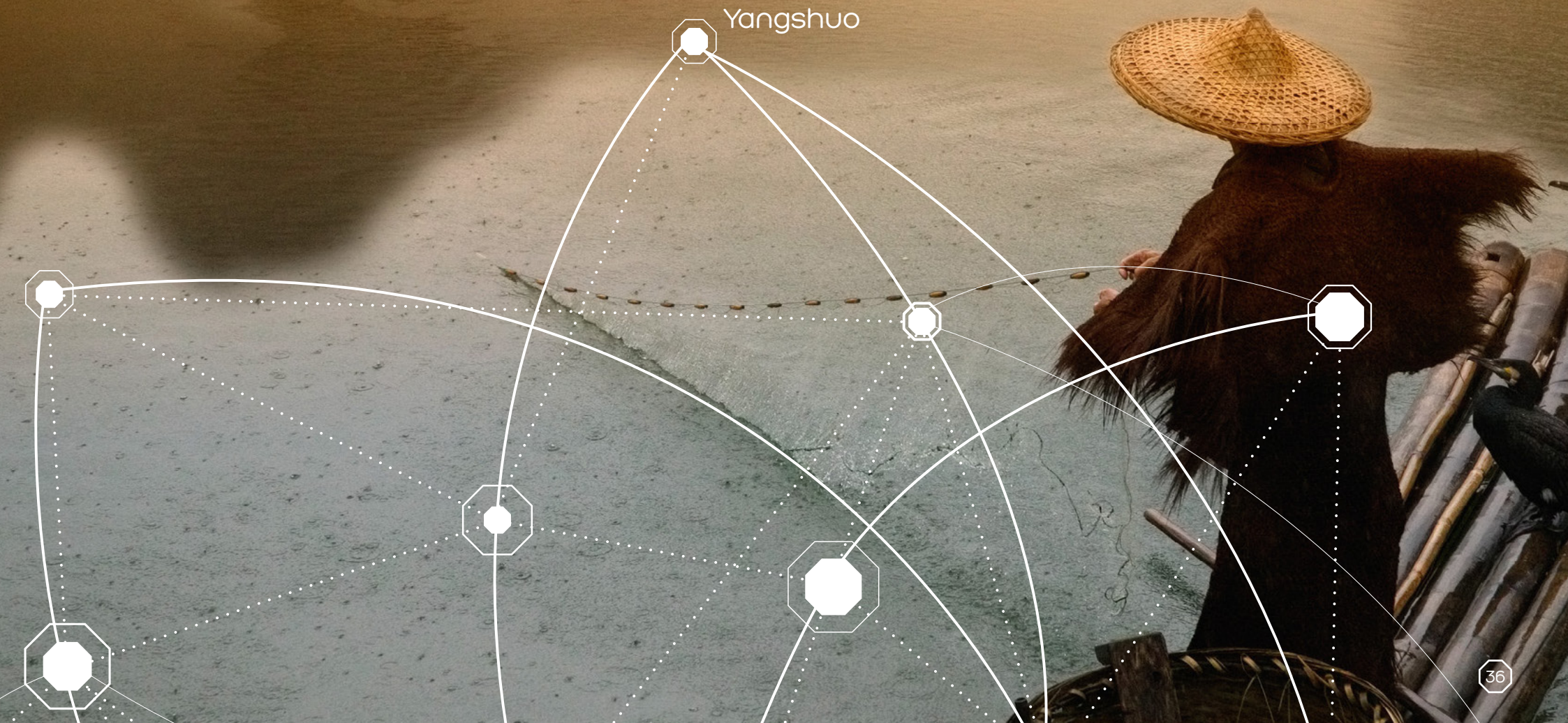
#### Consideration factors

- Reputation/brand
- Recommended on a travel review site (e.g. TripAdvisor)
- Reviews of travelers who stayed at the hotel
- Recommended by friends/family/colleagues

#### Style of accommodation

- Independent local hotels

# ④ Hoteliers' point of view



# Hoteliers' point of view

The hoteliers' survey shows that Chinese travelers contribute more business to the hotels of APAC than other regions, as this is still the most popular region.

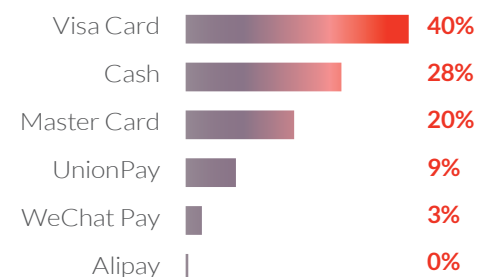
Altogether 45 percent of the hotels reported an increase in Chinese guests in the last year – a median increase of 11 percent – with as many as 66 percent of APAC hotels reporting an increase. Millennials aged 35 and under increased 12 percent. The hoteliers also expected an increase in Chinese guests of 13 percent over the next three years.

Over half the Chinese clientele at the hotels were millennials. The increase in Chinese travelers is largely being driven by increases in friends traveling together, partners/spouses without children and family travelers.

As they did last year, the hotels report that Chinese travelers spend most money on restaurant meals (where they spent an average of US\$218), room service and wi-fi/internet access. But room service, spa and on-site shopping have moved up the ranks.

The hotels reported that Visa cards were the most common payment method at their establishments, while only 9 percent paid by UnionPay. This is seen as a signal to hotels to introduce UnionPay, as the traveler research showed a preference for using this payment method.

## Most used method of payment by Chinese travelers



## Enquiries received by Chinese guests



## What Chinese travelers look for at hotels

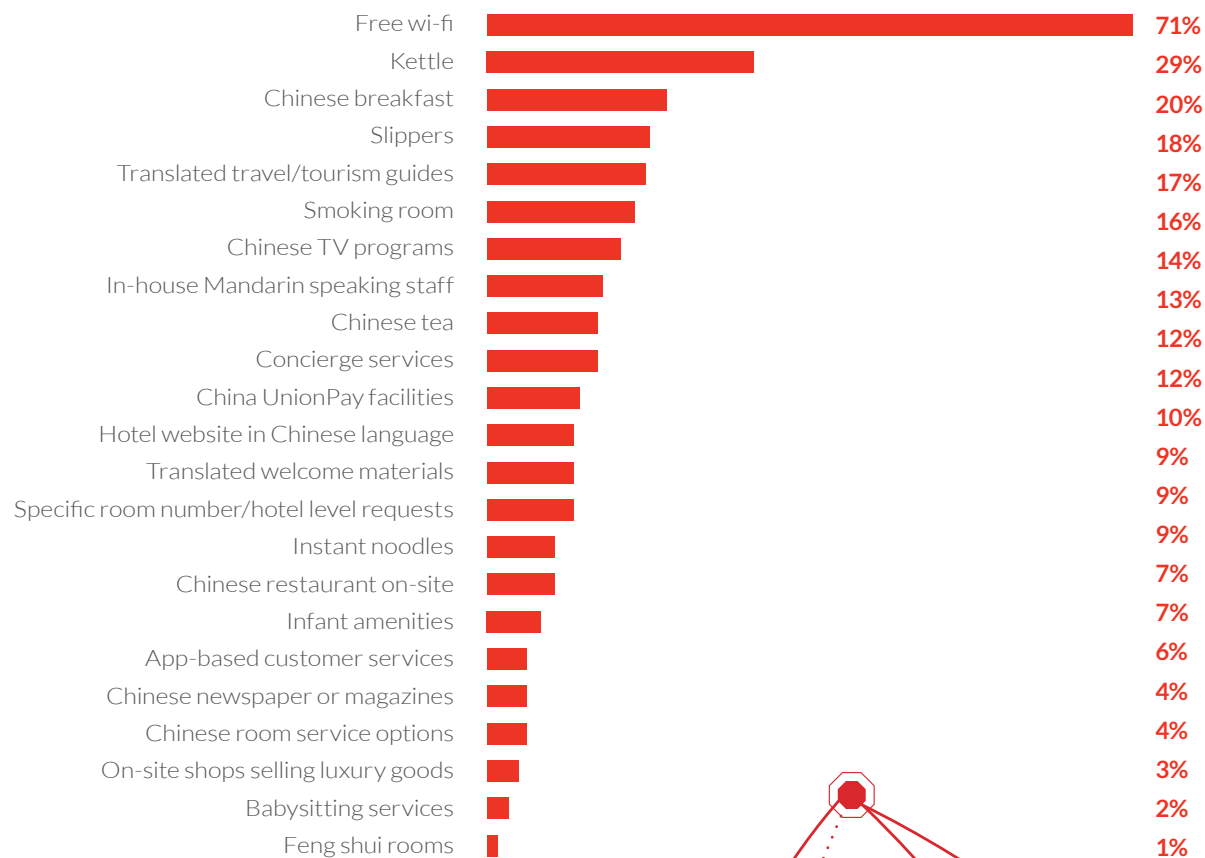
The biggest source of activity inquiries at the hotels was independent sightseeing (53 percent globally and 65 percent in APAC). There were particularly big increases in the level of inquiries about independent sightseeing in North and Latin America. Other major inquiries were about shopping and dining, but these were less in demand than the previous year.

There were regional differences: for instance, independent travel was hugely popular in APAC compared to the other regions; and there was a higher than average percentage of inquiries about museums and art galleries in the EMEA region, in visiting beaches in Latin America, and in gambling in North America.

When it comes to the top requests to hotels by Chinese travelers, free wi-fi and kettles were again number one and two on the list, but Chinese breakfast and slippers had moved into third and fourth place.

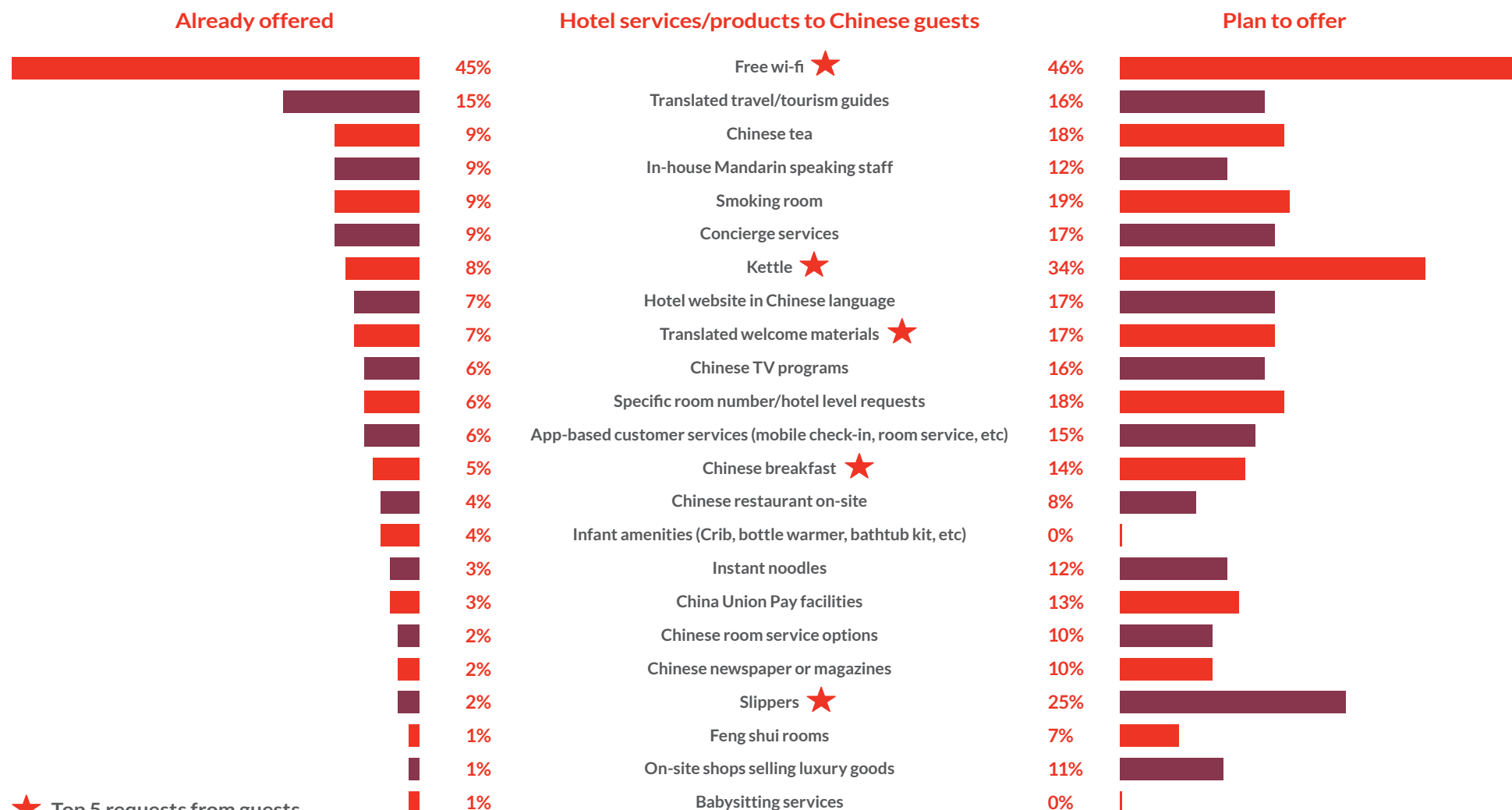
The survey found important differences in the needs of the guests in different regions. For instance, free wi-fi (the most frequently requested service in all regions) was particularly important in North and Latin America; in-house Mandarin-speaking staff were much more often requested in APAC; there was an exceptionally high and fast-increasing demand for kettles and slippers in EMEA; and a big demand for translated tourism/travel guides in Latin America.

### Most common requests from Chinese guests



The hoteliers made it clear that they planned to offer a wide range of new services and products to cope with the demands of Chinese travelers. With 45 percent already providing free wi-fi, 46 percent of the rest planned to offer it. With 15 percent already providing translated tourism/travel guides, another 16 percent were planning to provide them.

While only 8 percent currently provided a kettle, 34 percent planned to introduce this; and with slippers a rarity (2 percent of hotels), 25 percent were planning to provide them.



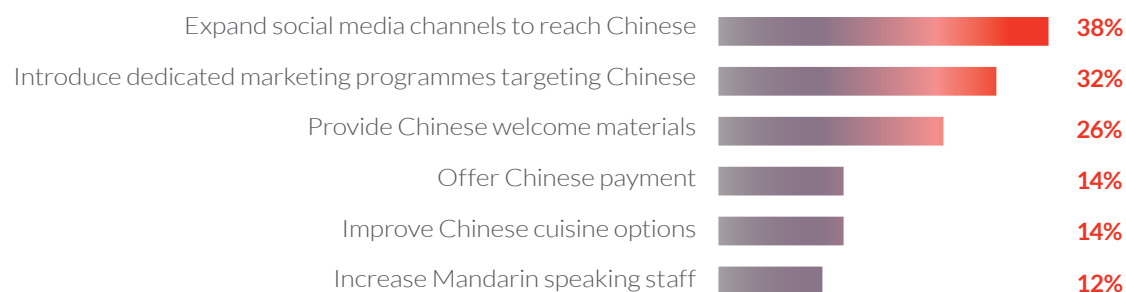
Hotels in APAC offer a good variety of programs and facilities for Chinese guests, while hotels in America are focusing on coping with cultural differences. Hotels are organizing more luxury tours for Chinese guests this year than in the previous year.

### Hotelier offerings catered to Chinese guests



The top priority for hotels in marketing to and catering for Chinese travelers is expanding social media channels, with 38 percent listing this. Introducing Mandarin-speaking staff is no longer a top priority.

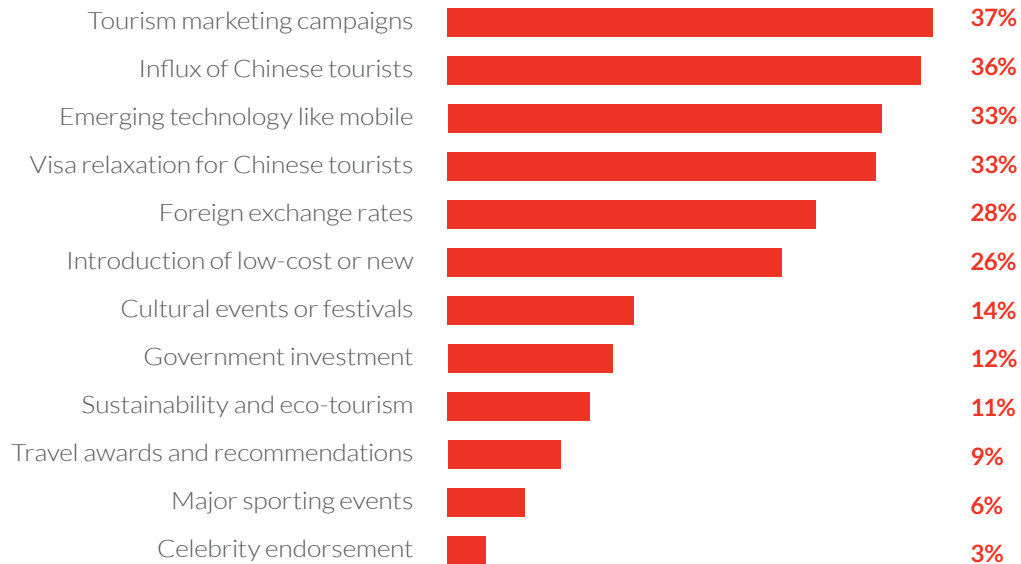
### Hotelier priorities for future resources aimed at Chinese guests



## What some hotel chains are doing to cater for Chinese travelers

When asked what travel trends would have the biggest impact over the next two years, number one was tourism marketing campaigns, particularly in North and Latin America. Second came the influx of Chinese tourists, followed by emerging mobile technology, visa relaxation for Chinese travelers and foreign exchange rates (this was seen as a very big factor in Latin America). An influx of Chinese tourists moved up from its third ranking last year to second swapping places with emerging technology like mobile.

### Travel trends predicted to affect hotels



- The InterContinental is training more than 10,000 of its staff to speak Mandarin as part of their “Zhou Dao” program. The hotel group also accepts China UnionPay, offers Chinese television channels, and serves Chinese tea<sup>5</sup>.
- Marriott has joined forces with Alipay to make payment easier for Chinese travelers<sup>6</sup>.
- Hilton International run a Hilton Huanying Program that offers Chinese travelers a customized hospitality experience during their stay. As part of the program, the hotel chain provides Chinese customers with slippers, Chinese television programs, kettles, congee (rice porridge), fried dough fritters, and dim sum with breakfast<sup>7</sup>.
- Similar offerings were part of Starwood’s ‘Personalized Travel Program’, along with Chinese menus and breakfast foods such as noodles<sup>8</sup>.

<sup>5</sup> <http://www.ihgplc.com/index.asp?PageID=57&NewsID=3441>

<sup>6</sup> <http://news.marriott.com/2015/09/marriott-international-welcomes-chinese-travelers-with-alipay/>

<sup>7</sup> <http://news.hilton.com/index.cfm/news/hilton-expands-welcome-program-for-chinese-travelers-globally?tl=fr>

<sup>8</sup> [http://www.starwoodhotels.com/promotions/promo\\_landing.html?category=CNTRLP&EM=VTY\\_CORP\\_PERSONALIZEDTRAVEL\\_PROMOTION](http://www.starwoodhotels.com/promotions/promo_landing.html?category=CNTRLP&EM=VTY_CORP_PERSONALIZEDTRAVEL_PROMOTION)

# 5 Country initiatives targeting Chinese outbound visitors

Great Barrier Reef

# Country initiatives targeting outbound Chinese travelers



Selected programs to attract more Chinese tourists, from around the world.

## Australia



- China has surpassed the targets for visitors laid out in the Tourism 2020 strategy launched in 2010. The value of tourism was initially estimated at AUD\$9 billion by 2020 but is already at AUD\$7.7 billion and it is thought it will be worth up to AUD\$13 billion by 2020<sup>9</sup>.
- 2015 saw 1,023,600 Chinese travelers to Australia, 22 percent up on 2014<sup>10</sup>.
- As a result of the Australia-China free trade agreement signed in June 2015, Australia introduced a new multiple entry 10-year visa<sup>11</sup>.
- In 2016, Australia also began trialing changes to visa applications, including reducing the number of visa categories, to make it easier for Chinese students to study in Australia, and allow for visa applications written in Mandarin<sup>12</sup>.
- Earlier in 2016, Australia's Prime Minister declared 2017 the year of Australian/Chinese tourism, with events and initiatives in both countries aimed at encouraging visitors.

## Singapore



- Over 2.1 million Chinese tourists visited Singapore in 2015<sup>13</sup>, a drop of 8.6 percent year-on-year was recorded in the first quarter of 2015.
- To help reverse the declining trend, the Pan-China travel campaign, jointly organised by the Singapore Tourism Board, the Changi Airport Group, Lex Travel and several Chinese travel agents, was formed to encourage Chinese tourists to Singapore<sup>14</sup>.
- The Singaporean government extended the Multiple Journey Visas (MJVs) of Chinese visitors from June 2015 to a maximum of 10 years. This also applies to travelers' spouses and children under 21 years old<sup>15</sup>.

<sup>9</sup> <http://www.smh.com.au/business/the-economy/annual-chinese-visitor-numbers-exceed-1-million-for-first-time-20160111-gm3shn.html>

<sup>10</sup> <http://www.tourism.australia.com/markets/market-regions-greater-china.aspx>

<sup>11</sup> [www.abc.net.au/news/2015-06-19/chinese-enthused-about-10-year-visas-for-tourists/6560184](http://www.abc.net.au/news/2015-06-19/chinese-enthused-about-10-year-visas-for-tourists/6560184)

<sup>12</sup> [www.news.com.au/world/breaking-news/pm-rolls-red-carpet-for-chinese-tourists/news-story/4f3187e8884c6c35a753275a59c5a26d](http://www.news.com.au/world/breaking-news/pm-rolls-red-carpet-for-chinese-tourists/news-story/4f3187e8884c6c35a753275a59c5a26d)

<sup>13</sup> [www.stb.gov.sg/statistics-and-market-insights/marketstatistics/ivastat\\_dec\\_2015%20%28as@29feb16%29.pdf](http://www.stb.gov.sg/statistics-and-market-insights/marketstatistics/ivastat_dec_2015%20%28as@29feb16%29.pdf)

<sup>14</sup> [www.businesstimes.com.sg/government-economy/china-inbound-tourism-on-road-to-recovery](http://www.businesstimes.com.sg/government-economy/china-inbound-tourism-on-road-to-recovery)

<sup>15</sup> [www.webintravel.com/singapore-set-to-receive-more-prc-tourists-with-easing-of-visa-regulations/](http://www.webintravel.com/singapore-set-to-receive-more-prc-tourists-with-easing-of-visa-regulations/)

## United Kingdom

- Visits from China to the UK were up 46 percent in 2015, moving China into the UK's top 10 most valuable inbound markets<sup>16</sup>.
- VisitBritain, the national tourism authority, which is hoping to double spending from Chinese visitors to £1bn by 2020, said they were already among the highest spenders – ringing up £2,688 a head. Chinese visitors already account for almost a quarter of tourist spending in the UK<sup>17</sup>.
- In October 2015, the British Prime Minister announced major measures to make it easier for Chinese travelers to get visas. From January 2016, new visitor visas for tourists from China are valid for two years – four times the previous 6-month limit for a standard visitor visa<sup>18</sup>.

## France

- About 2 million Chinese visited France in 2015, and the number is expected to reach 5 million in coming years. In the first quarter of 2015 alone, Chinese tourists increased by 50 percent year-on-year<sup>19</sup>.
- The Shanghai consulates of France, Germany and the Netherlands announced in May 2016 that a new joint visa application center had opened in Hangzhou, Zhejiang Province – the first of a number throughout China<sup>20</sup>.
- Chinese tourists are priority targets of luxury hotels in Paris, where they are known as big spenders. For instance, The Peninsula offers a Cantonese restaurant and familiar Chinese lion sculptures sit at the entrance welcoming patrons<sup>21</sup>.

## South Korea

- In January 2016, South Korea's Culture Minister Kim Jong-deok hosted a ceremony in Beijing for the “Year of Visiting Korea” and unveiled a plan to attract a record eight million Chinese travelers this year<sup>22</sup>.
- Some 80 million more Chinese people became eligible to receive a 90-day complex visa for South Korea with the lowering of the age limit from 55 to 60. Travelers with professional occupations, such as corporate CEOs or those with a master's degree or higher, can now apply for a visa valid for 10 years.
- In addition, Chinese group travelers were exempted from visa fees, six new air routes between the two nations were introduced and Kim said his ministry would develop specialized fashion, culture, beauty and leisure tour packages.

<sup>16</sup> [www.chinatravelnews.com/article/103981](http://www.chinatravelnews.com/article/103981)

<sup>17</sup> [www.theguardian.com/business/2016/jan/27/chinese-tourist-numbers-coming-to-uk-up-nearly-40](http://www.theguardian.com/business/2016/jan/27/chinese-tourist-numbers-coming-to-uk-up-nearly-40)

<sup>18</sup> [www.gov.uk/government/news/pm-announces-significant-changes-to-visitor-visas-for-chinese-tourists-for-the-benefit-of-the-british-economy](http://www.gov.uk/government/news/pm-announces-significant-changes-to-visitor-visas-for-chinese-tourists-for-the-benefit-of-the-british-economy)

<sup>19</sup> [www.chinainternetwatch.com/14457/china-tourists-50-yoy-q1-2015/#ixzz490lgXjHi](http://www.chinainternetwatch.com/14457/china-tourists-50-yoy-q1-2015/#ixzz490lgXjHi)

<sup>20</sup> [www.globaltimes.cn/content/982108.shtml](http://www.globaltimes.cn/content/982108.shtml)

<sup>21</sup> [red-luxury.com/travel-tourism/parisian-luxury-hotels-pursue-and-are-pursued-by-the-chinese-24773](http://red-luxury.com/travel-tourism/parisian-luxury-hotels-pursue-and-are-pursued-by-the-chinese-24773) | Red Luxury

<sup>22</sup> [koreatimes.co.kr/www/news/nation/2016/01/113\\_195862.html](http://koreatimes.co.kr/www/news/nation/2016/01/113_195862.html)



## United States

- China has moved from 22nd-largest overseas source market in 2000 to the third-largest in 2015, and is projected to become the largest in 2020<sup>23</sup>.
- In 2015, 2.67 million Chinese visited the United States, up from the 2.1 million who visited in 2014<sup>24</sup>.
- As a result of Chinese President Xi Jinping's 2015 visit to the United States, 2016 has been called the US-China Tourism Year. This joint initiative aims to increase travel and tourism between the two countries by enhancing the traveler's experience, cultural understanding and appreciation of natural landscapes in each other's countries<sup>25</sup>.

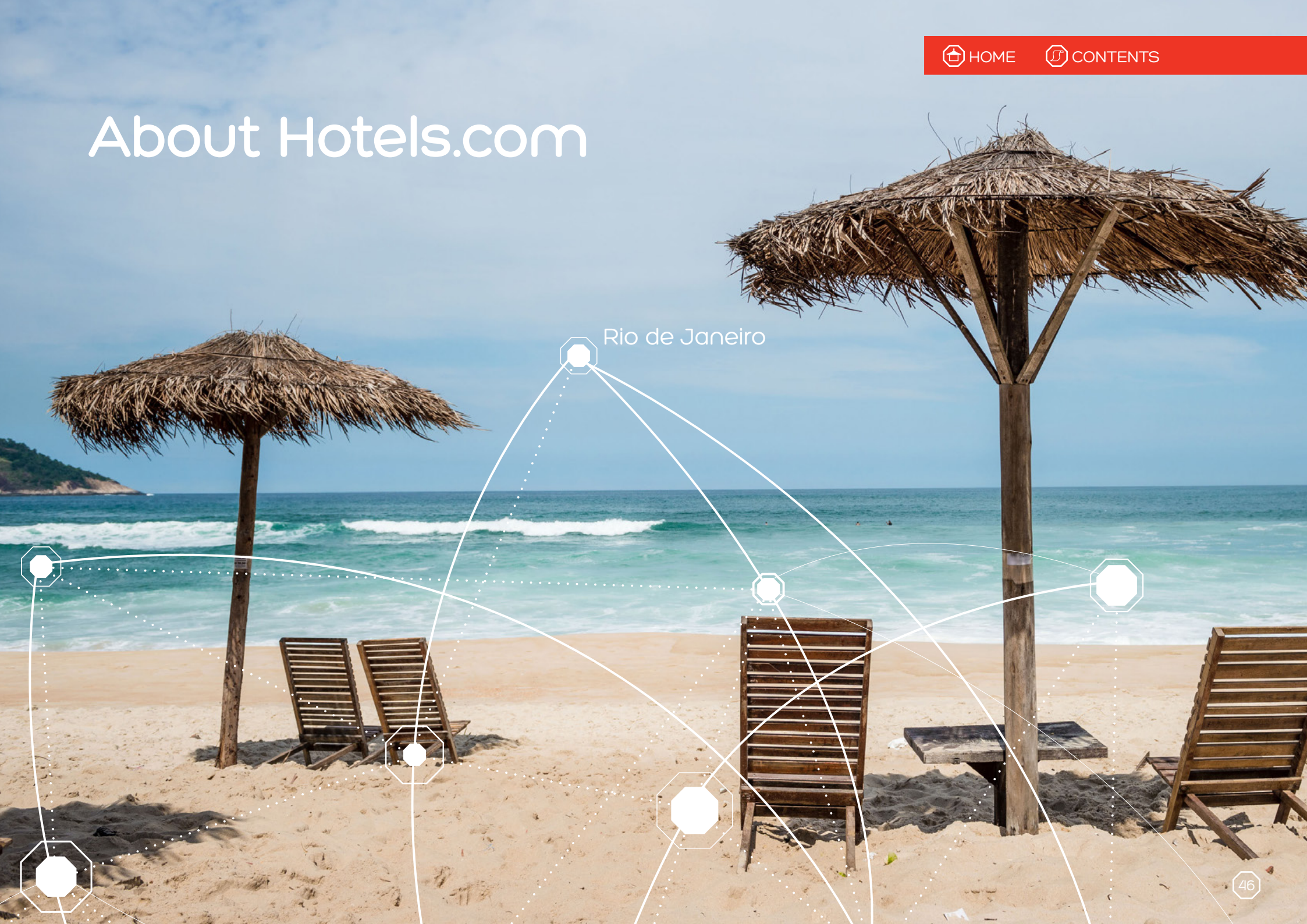
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<sup>23</sup> [www.ustravel.org/system/files/Media%20Root/Document/Fact%20Sheet\\_International%20Inbound%20Travel\\_2015.pdf](http://www.ustravel.org/system/files/Media%20Root/Document/Fact%20Sheet_International%20Inbound%20Travel_2015.pdf)

<sup>24</sup> [news.xinhuanet.com/english/2016-03/02/c\\_135148805.htm](http://news.xinhuanet.com/english/2016-03/02/c_135148805.htm)

<sup>25</sup> [beijing.usembassy-china.org.cn/2016/u.s.-and-china-to-launch-2016-u.s.-china-tourism-year](http://beijing.usembassy-china.org.cn/2016/u.s.-and-china-to-launch-2016-u.s.-china-tourism-year)

# About Hotels.com



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Hotels.com, part of the Expedia® group, is a leading online accommodation booking website displaying the rates and availability of hundreds of thousands of properties around the world, ranging from international chains and all-inclusive resorts to local favorites and bed and breakfast establishments. Hotels.com provides all the information needed to book the perfect stay.

Starting as a telephone service in 1991, the first website was launched in the USA in 2002. There are now more than 85 Hotels.com sites worldwide in Europe, North and Latin America, Asia/Pacific, the Middle East and South Africa, the majority of which are in localised languages.

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\* The maximum value of the free nights is the average daily rate of the 10 nights stayed. The free night does not include taxes and fees.

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