

Check-In to Their Hearts: The 2026 China Playbook



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RISING MOMENTUM IN CHINA'S OUTBOUND MARKET

Chinese travelers spent **\$250 billion** abroad in 2024

155 million international trips are expected from China with 72% are multiple international trips.

44% are first-time outbound travelers

64% are Gen Z female travelers



WHEN AND WHERE FOR CHINA'S OUTBOUND

When do you plan to travel outbound
in the next 12 months? (N=764)



Photos from Unsplash

2025 National Day holiday: Outbound travel destination

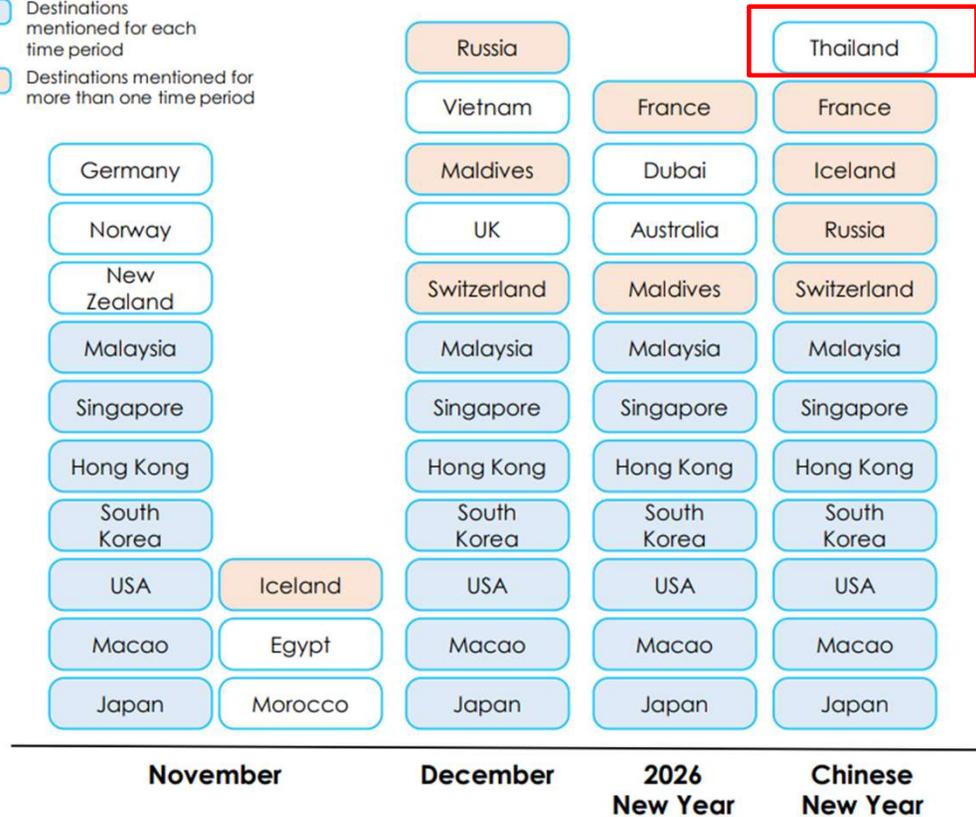
N=377

			% Booked/ plan to visit	% Repeat visit
#1		South Korea	16.2%	14.8%
=#2		Macao	9.5%	44.4%
=#2		Japan	9.5%	33.3%
=#4		Thailand	5.0%	36.8%
=#4		Hong Kong	5.0%	26.3%
#6		Malaysia	4.8%	22.2%
#7		Singapore	4.5%	11.8%
#8		Ireland	3.7%	14.3%
#9		Australia	3.4%	46.2%
#10		Iceland	3.2%	8.3%
=#11		France	2.9%	27.3%
=#11		Maldives	2.9%	27.3%
#13		USA	2.7%	50.0%

Where and when do you plan to travel abroad for the rest of the year (excluding National Day holiday)?

N=561

- Destinations mentioned for each time period
- Destinations mentioned for more than one time period



As the middle class continues to grow, key segments with different characteristics begin to emerge

Gen-Z



- Always-on broadband internet
- Craving for community
- Deeper preference towards unique and personalized products
- Strong interest towards experiences related to own value and identity
- From wellness to wellbeing

Millennials

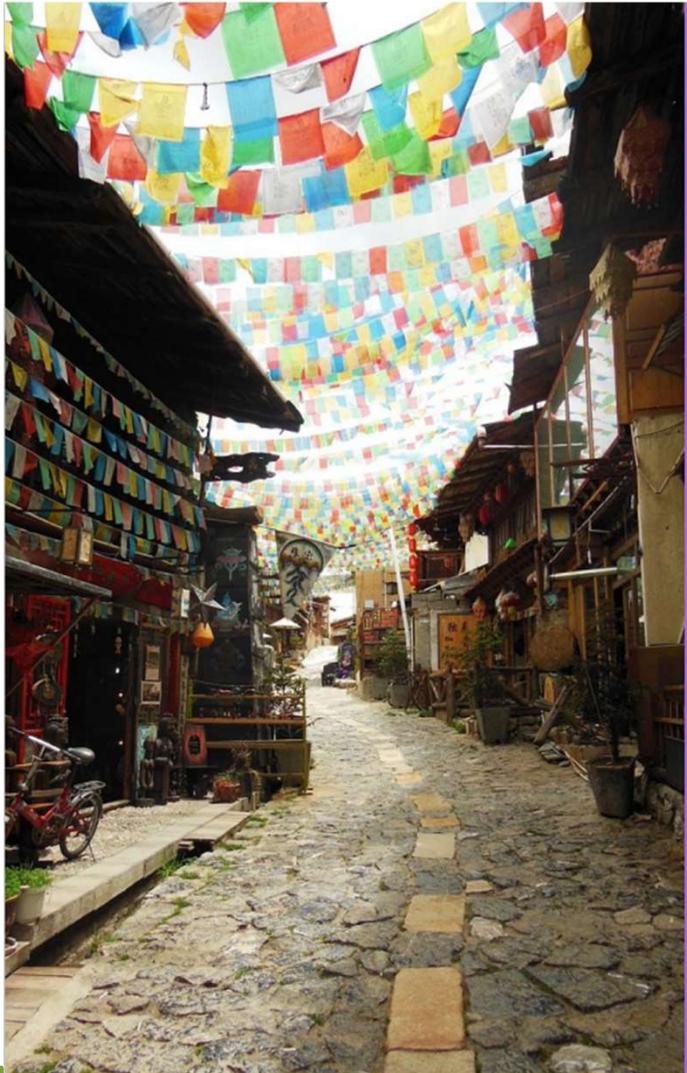


Silvers



- Higher willingness to spend
- Stronger propensity to travel
- Increasing levels of digital savviness





LEISURE TRIP ACTIVITIES PLANNED

DOMESTIC	Rank	OVERSEAS
Exploring local culture, traditions, and landmarks	01	Exploring local culture, traditions, and landmarks
Fine dining at renowned restaurants	02	Fine dining at renowned restaurants
Exploring natural wonders, scenic landscapes, or national parks	03	Shopping for luxury goods and designer brands
Exploring historic villages with preserved architecture	04	Exploring natural wonders, scenic landscapes, or national parks
Farm-to-table dining, rural culinary experiences, or agritourism visits	05	Wine tasting or vineyard visits
Beachside relaxation, water sports, or yachting experiences	06	Beachside relaxation, water sports, or yachting experiences
Relaxing at luxury spas or wellness retreats	07	Whisk(e)y tasting or distillery visits
Participating in exclusive events or festivals	08	Exploring historic villages with preserved architecture
Participating in wildlife safaris or ecotourism	09	Relaxing at luxury spas or wellness retreats
Enjoying theatrical performances or live entertainment	10	Participating in exclusive events or festivals

EMOTIONAL VALUE: BUY GOODS FOR GOOD MOODS



Furry dolls of Labubu in a new Pop Mart shop in Bangkok, Thailand, July 5, 2024. /CFP

情绪
qíng xù
价值
jià zhí

FIVE ECONOMY FRAMEWORK FOR CHINA'S OUTBOUND TRAVEL

She Economy

- 64% GenZ female travellers
- 44% spend > \$3.5K
- Xiaohongshu & Douyin for planning and style inspiration
- Prioritise visual, trendy, & shareable experiences
- Look for brands that offer social proof, service support

Promote culturally rich, photogenic experiences (e.g. art hotels, café walks, spa & wellness packages). Partner with KOLs and travel vloggers.



Value Economy

- "Value-for-money"
- E.g. - 19% consider Price Yet 72% want to stay in 4-star+
- Book trips with bundled value, exclusivity, or cultural depth
- Compare before booking across OTAs and travel apps

Position products around value-for-experience—multi-day passes, flexible upgrades, loyalty-driven perks, or cultural bonuses.



Emotional Economy

- Travel = memory + meaning + connection
- 30% - Souvenirs, storytelling & emotional meaning
- 10% Gift for family / friends
- Seek destinations or moments that evoke personal belonging

Focus messaging on belonging, heritage, and purpose. Promote local traditions, seasonal festivals, and small group experiences with storytelling power.



Silver Economy

- Driven by health confidence + higher saving + ample time
- Prefer safety, comfort, and clarity over spontaneity
- 30% influenced by social media
- Health & wellness are raising priorities

Highlight accessibility, bilingual support, and service. Package wellness stays, cultural shows, and guided activities that build confidence.



Confidence Economy

- 44% first-time travellers, up from 38%
- Safety, structure & peer-proofed plans
- Rely on Social media + semi guided packages
- Prefer brands that are clear, trustworthy, and reassuring

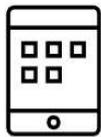
Offer clear itineraries, transparent pricing, and trusted partnerships. Think pre-trip webinars, Mandarin support, or "first-timer bundles"



SOURCE: CHINA TRADING DESK

The digital applications have become instrumental in daily lives

Significant time spent on mobile



> 7 hours

per day for Gen X, Y and Z¹



On demand from food to grocery



<30

minutes for meals and groceries



Cashless payment everywhere anytime

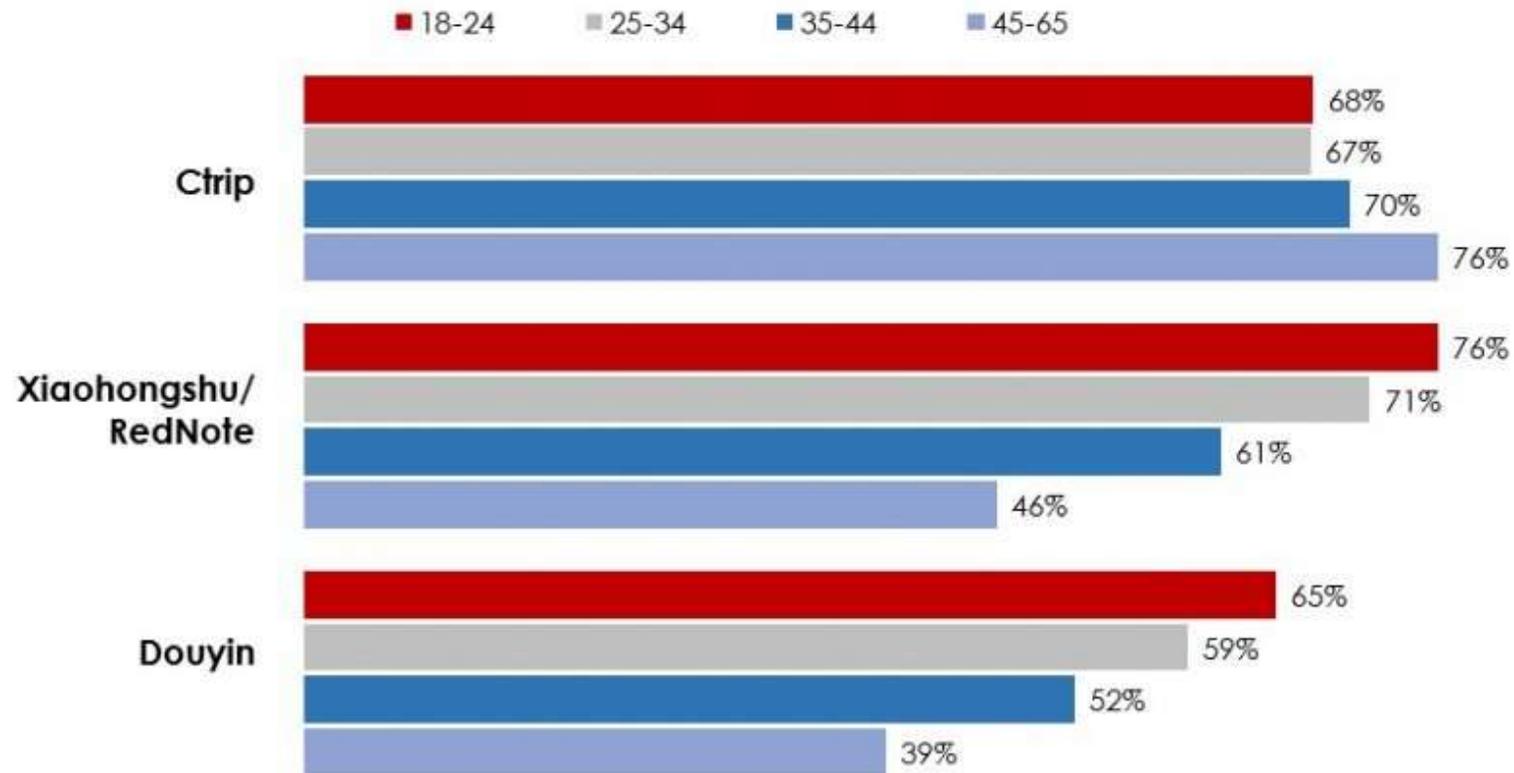


80~90%

penetration in online & offline shopping



Top 3 destination information channels for Chinese outbound travelers in different age groups



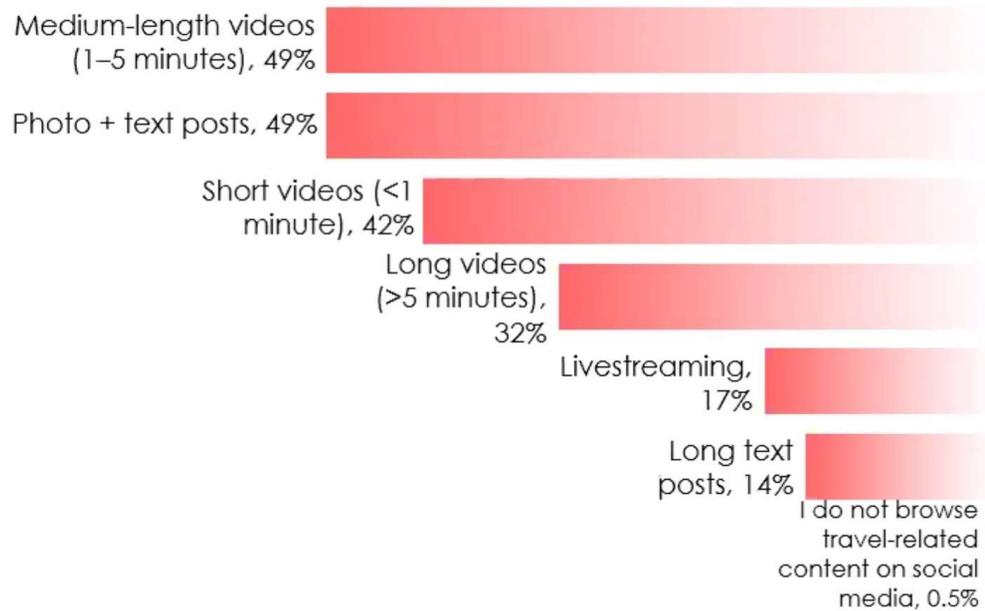
Dragon Trail: Chinese Traveler Sentiment Report, April 2025



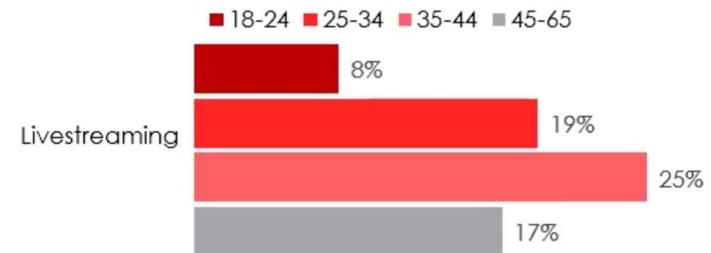
Preferred Format of Travel Content on Social Media

When browsing travel content on social media, which formats do you prefer?

N=1076



Age differences in preferred format of travel content on social media



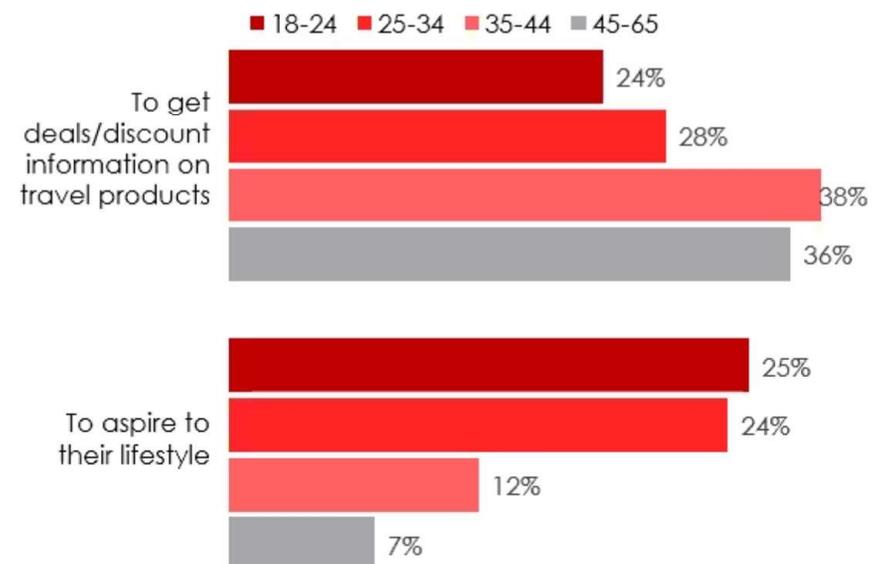
Deep Dive on Travel Influencers

Main reasons for following travel influencers

N=928

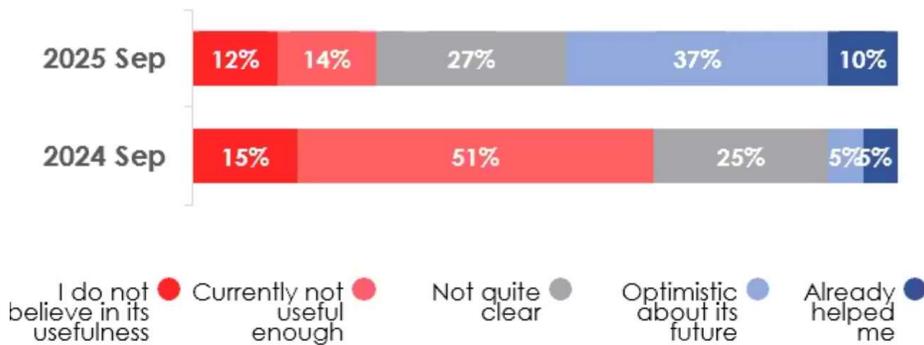
To get practical travel advice (e.g., itineraries, transportation)	58%
To learn more about destinations I'm interested in	56%
To discover new destination ideas	36%
To enjoy beautiful photos/videos	32%
To get deals/discount information on travel products	30%
For entertainment or to pass the time	24%
To aspire to their lifestyle	19%

Age differences in main reasons for following travel influencers

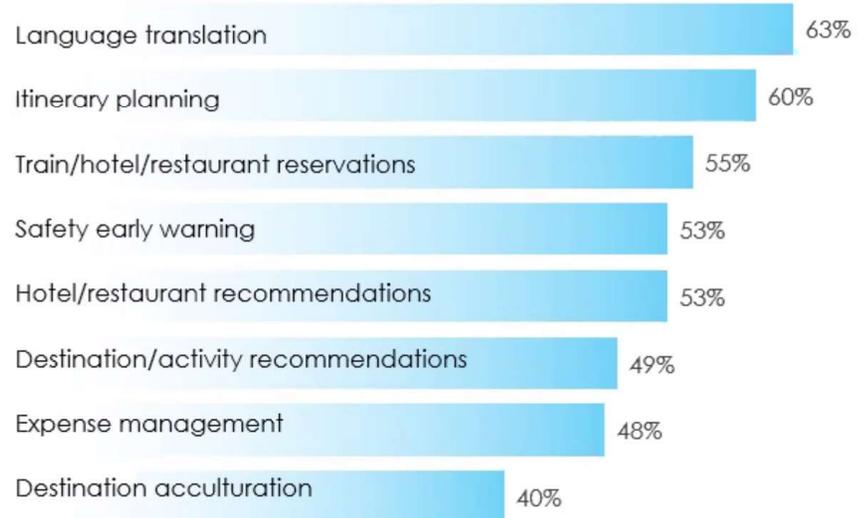


AI for Travel: Attitudes and Areas of Expected Optimization

Chinese travelers: Attitudes on AI travel assistants/functions (N=1076)



Chinese travelers hope AI can optimize their travel experience in ...



In travel, social commerce (short videos & livestreams) is also at the verge to takeoff

Short videos

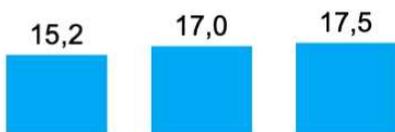


Brand videos provide additional detail into products or experiences and stimulate further interest

Short personal experience videos/ vlogs create intimate connection to consumers to build trust

Consequently, ad budgets for short video continue to grow...

...and perceptions are enhanced by peer reviews



6/10

consumers actively seek user reviews before making a purchase

Livestreaming



Location-based

S O F I T E L
LUXURY HOTELS

Focused on driving **location-based business**; can be leveraged to encourage dining and **ancillary revenue streams**

Destination-based

UNIVERSAL

Generates **inspiration for non-local experiences**; drive interest in destination resorts and offerings

AI-based

蒙牛

Captures attention as novel format – **24/7 streaming programs** by brands to drive sales during holidays & big sales

Attract: Lululemon builds an extensive matrix of 100+ accounts on RED to drive location-based interaction with customers

On RED and Douyin, Lululemon leverages a matrix of accounts to build brand story and acquire traffic for community operation



Occasion based

High quality picture

Fashion sense

Good looking model

Outfit recommendation

Vibrant color

100+ city/SA account in a bottom-up way (e.g., store staff managing comments)

Proactive outreach and membership invitation to consumers engaging on video content

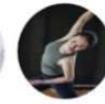


Commenters on videos are encouraged to sign up for Lululemon membership programs, not only on the video platforms but through the dedicated Lululemon miniapp on WeChat as well

Engage: Lululemon enhances community through store-based WeChat groups and 1:1 chats



Lululemon strengthen its culture and brand through continual communication



Jennifer
Lululemon 浦东高东店店长

Joy 王
浦东高东店瑜伽教练

Tina 王
浦东高东店瑜伽教练



Store manager plays the mini-CEO role, responsible for content generation, local events, KOC recruitment on the WeChat page

One-on-One communication directly with the brand or the store helps build relationships before a purchase is even made

Passionate ambassadors, usually yoga coaches who genuinely love the brand, engage directly in with consumers on the platform



~100

communities with their respective WeChat groups that helps to enhance consumer engagement and bring traffic back to the store

Communication follows clearly defined user engagement cadence (e.g., greeting, sharing tips, asking about experience)

TOP TAKEAWAYS FOR MARKETERS



Chinese outbound stabilize and CNY is the next opportunity 01



Top Segments are GEN Z, Millennials AND Silvers 02



The five-economy framework for China's outbound travel 03



Leverage short video content via social medias KOL 04



Adopt new ways to attract and engage Chinese customers 05

THANK YOU

Park Hyatt Sanya, China