

Sabre

CHINA UNLEASHED:

1. Outbound travel

from mainland

China is up by **400%**



2. Airfare prices

down by up to **73%**

3. Airline capacity up

by more than

on key routes **3000%**



4. Premium economy

travel is up ... and **Business Class** is back

5. Fast growing destinations

for Chinese travelers include

Macao, Australia, Japan, Russia, and Bangladesh



6. Demand for Chinese New Year travel stronger than pre-pandemic



China unleashed: Outbound travel from China surges by close to 400%

The tourism world was significantly impacted by the slowdown in travel from China during the pandemic. However, according to Sabre's booking insights, Chinese tourists are back with a vengeance on the global tourism stage, with a 392% surge in outbound travel booked from mainland China for 2024, compared to the previous year.

When you consider that, pre-pandemic, travellers from China made 155 million international trips, [collectively spending to the tune of \\$245 billion](#), it's little wonder that the world has been waiting for China to re-enter the global tourism market in a significant way.

However, with China slower to ease travel restrictions in comparison to other countries, even after the re-opening of borders, it hasn't been a quick comeback. The major rebound of outbound Chinese travel that some expected in 2023 didn't occur. That picture is rapidly changing in 2024, and what is clear from Sabre's analysis of industry data (which looks at travel booked from mainland China as of March 31, 2024) is there is a huge appetite among Chinese travelers for global travel.

While outbound travel hasn't rebounded to pre-pandemic levels, bookings for travel to key parts of the world during typical peak travel dates are seeing particularly strong demand. Bookings made at the end of January before the 2024 Chinese New Year break for travel from mainland China to countries in the Asia Pacific region, for example, were at 106% of 2019 levels.

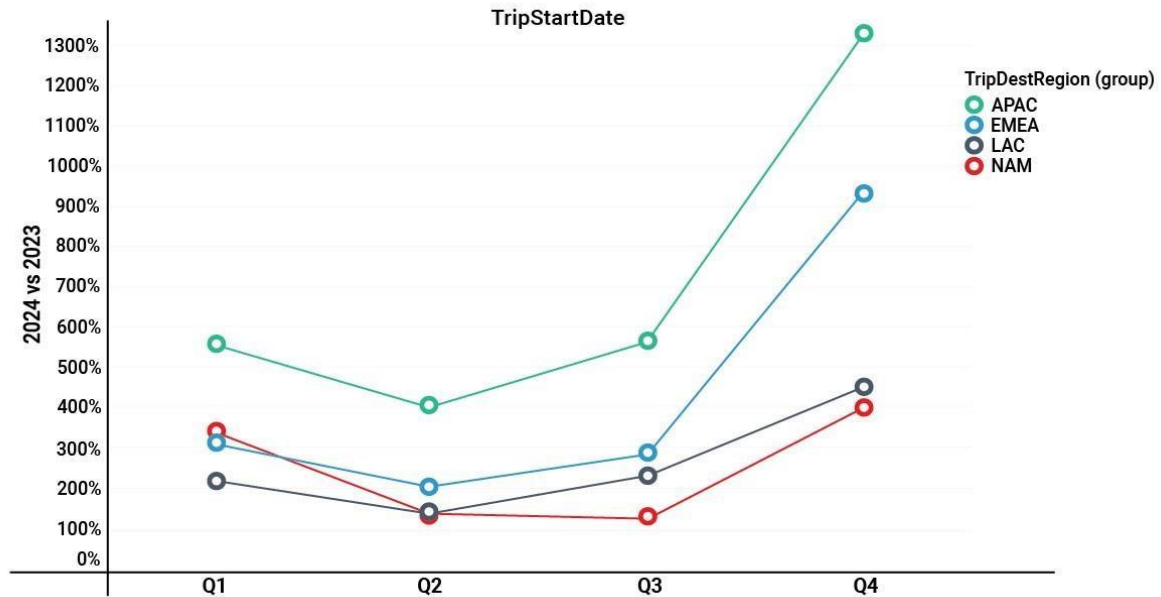
Our key findings include:

- *Travel originating from mainland China has increased by a whopping 392% overall globally for 2024, with some destinations seeing surges of more than 2,000%;*
- *Chinese travelers are taking advantage of reciprocal visa-free agreements with countries around the world, but they aren't limiting where they travel;*
- *Airfare prices are down, making travel more affordable for Chinese travelers;* • *Fastest growing routes globally for Chinese travelers in 2024 include Macao, Australia, Japan, Russia, and Bangladesh.*
- *Chinese travelers are once again embracing Business Class travel, and demand for Premium Economy travel is increasing;*
- *Outbound airline capacity is up by more than 3000% on some routes as airlines look to meet demand.*

OUTBOUND TRAVEL IS BACK WITH A VENGEANCE

Sabre's industry booking data analysis shows that the amount of travel originating in mainland China, either already travelled or booked to travel during 2024 (up to 31 March 2024) has increased significantly compared to travel booked at the same point by 2023, soaring by 392% overall.

Outbound travel from mainland China in 2024 vs 2023



Source: Sabre Market Intelligence MIDT

Outbound travel to all global regions has markedly increased across the year, according to Sabre's analysis, which looks at travel booked as of March 31 2024. Notably, Chinese travelers are booking in advance for the whole year, showing strong confidence in the travel landscape. Bookings for November and December are significantly up across regions, recording more than 1000% year-on-year for all regions, and notably, more than 2000% for those months for travel to Europe and the Middle East.

For travel to other countries in Asia Pacific (APAC) from China, travelers are planning their trips well in advance, with booking numbers showing large increases, when compared to 2023, for the whole year. October, when the Golden Week holiday period will fall, is recording the largest year-on-year increase in bookings at 1347%.

Outbound travel from China to the Europe and Middle East region (EMEA) peaked in the first quarter of the year, in January with a 676% increase. Again, there are increases throughout the whole year, with a significant year-on-year boost in December.

For the Americas, travel to North America in the first quarter recorded the second highest year-on-year growth, after APAC, at 336%, and travel to Latin America is also increasing throughout the year, with the most significant booking increases for the final quarter of 2024.

Booking volumes will evolve as the year goes on.

NEW FAVORITES AND OLD FAVORITES RE-VISITED

Chinese travellers are renowned for being [high spenders when they travel](#), spending an average of \$1,000 a day during their trips. During the nine years up to 2023, [disposable income per capita roughly doubled in China](#), potentially meaning more money to spend on travel. Considering Chinese travelers' huge collective spending power, several countries around the world have launched initiatives in a bid to be their destination of choice.

Many countries globally have a strategy to attract these high-spending tourists. For example, [South Africa, Kenya and Tanzania have launched marketing strategies](#) to attract more Chinese travellers, as have [Thailand, Indonesia, France](#) and [Saudi Arabia](#)

So, who is winning Chinese travelers over?

While Chinese outbound travel is significantly increasing overall, there have been destination changes in terms of the most popular routes, when comparing 2023 to 2024, and then looking at the percentage increase in travel booked to each destination.

Most popular destinations for travelers from mainland China for 2024 vs 2023

	2024 Rank	2023 Rank	2024 vs 2023
 KOREA	1	3	652%
 JAPAN	2	6	990%
 UNITED STATES	3	1	211%
 THAILAND	4	2	339%
 HONG KONG	5	4	414%
 TAIWAN	6	5	326%
 AUSTRALIA	7	14	1008%
 SINGAPORE	8	9	466%
 MALAYSIA	9	18	651%
 ITALY	10	7	232%
 VIETNAM	11	11	392%
 INDONESIA	12	19	596%
 CANADA	13	8	248%
 PHILIPPINES	14	12	381%
 MACAO	15	44	2304%
 UNITED KINGDOM	16	22	525%
 SPAIN	17	10	239%
 LAOS	18	21	431%
 RUSSIA	19	26	758%
 GERMANY	20	17	329%
 UNITED ARAB EMIRATES	21	15	272%
 NEW ZEALAND	22	24	442%
 FRANCE	23	20	309%
 CAMBODIA	24	13	208%
 INDIA	25	27	520%
 EGYPT	26	25	354%
 SOUTH AFRICA	27	16	139%
 TURKEY	28	28	354%
 KAZAKHSTAN	29	40	598%
 BANGLADESH	30	46	603%

Source: Sabre Market Intelligence MIDT

The top 10 most popular destinations for outbound Chinese travelers are similar in 2024 compared to 2023. However, Australia and Malaysia have moved into the top 10, with Australia moving up seven places, and Malaysia moving from 18th to ninth, while Canada and Spain dropped out. Korea and Japan rose in the rankings to take first and second place respectively, pushing down the US and Thailand.

In the top 30, there has been more movement when compared to 2023. Travel from mainland China to Macao, which is popular as a gambling hub, is also up significantly from 44th place to 15th. Meanwhile, Britain has moved from 22nd to 16th, and Kazakhstan is up from 40th to 29th, with many tourists drawn to its winter sports activities. Bangladesh is also seeing an increase to 30th place from 46th, which may be due to corporate and visiting family travel, and the launch of new routes.

Most popular destinations for Chinese travellers around the world

All regions are seeing significant growth in visitors from mainland China. Let's take a look below at the most popular cities flown to by region from mainland China, with each graphic showing the change in popularity from 2023 to 2024 as well as the percentage increase in travel booked.

In North America, traffic is up to the US by more than 200%, with the US remaining in 1st place, ahead of Canada which is in 2nd. In terms of favorite destinations in the US for travelers from mainland China, there is little change to the top 10 when comparing 2024 with 2023. New York, Los Angeles and San Francisco remain in the top three spots. The biggest change is an increase in popularity for Hawaii, [which is keen to further tap into Chinese tourism](#), with Honolulu moving from 9th to 5th place.



Source: Sabre Market Intelligence MIDT

Russia, Kazakhstan, Uzbekistan and the UK are seeing the biggest increase in numbers for Europe, with the UK moving from 5th place in the European rankings to 2nd when looking at countries travelled to. In terms of popular cities, London has moved from 5th to 1st while Moscow is up from 8th to 3rd. Italy and Spain both have two cities in the top 10 destinations from China.

Top European destinations for travelers from mainland China



	2024 Rank	2023 Rank	2024 vs 2023
 LONDON	1	5	584%
 ROME	2	1	212%
 MOSCOW	3	8	649%
 PARIS	4	4	317%
 MADRID	5	3	237%
 MILAN	6	2	220%
 FRANKFURT	7	6	286%
 ISTANBUL	8	9	364%
 BARCELONA	9	7	280%
 AMSTERDAM	10	10	315%

Source: Sabre Market Intelligence MIDT

In the Middle East, Iran has seen the highest increase in visitors, moving from 10th to 8th place, and switching places with Israel. From a city perspective, Dubai remains in 1st place, while Abu Dhabi has seen a significant rise from 7th to 3rd.

Top Middle East destinations for travelers from mainland China







	2024 Rank	2023 Rank	2024 vs 2023
 DUBAI	1	1	257%
 CAIRO	2	2	347%
 ABU DHABI	3	7	370%
 DAMMAM	4	4	144%
 JEDDAH	5	3	104%
 RIYADH	6	5	208%
 DOHA	7	10	354%
 BASRA	8	6	157%
 AMMAN	9	9	257%
 KUWAIT	10	8	192%

Source: Sabre Market Intelligence MIDT

For Latin America, looking at a country perspective, Brazil is seeing the biggest traffic increase and remains in 1st place compared to 2023, while Argentina has shifted from 6th to 3rd most popular destination. Panama, which has a substantial Chinese expat population, remains in 2nd place. Meanwhile, Peru, which was awarded gold at the Chinese Tourist Welcome awards in 2023, has moved from 9th to the number-six spot, and Venezuela, [which signed a tourism agreement with China in 2023](#), has dropped five places. In terms of cities flown to, Brazil has two destinations in the top 10, with both Sao Paulo and Rio de Janeiro seeing more than 300% increases in volume of travel booked.

Top Latin America destinations for travelers from mainland China



	2024 Rank	2023 Rank	2024 vs 2023
 SAO PAULO	1	1	324%
 PANAMÁ	2	2	167%
 BUENOS AIRES	3	6	291%
 MEXICO CITY	4	3	155%
 SANTIAGO	5	4	128%
 LIMA	6	7	199%
 RIO DE JANEIRO	7	9	331%
 QUITO	8	8	143%
 BOGOTÁ	9	10	293%
 CARACAS	10	5	46%

Source: Sabre Market Intelligence MIDT

In Asia Pacific, the countries with the biggest increase are Australia and Japan, with Australia moving from 8th to 6th place in the region, and Japan from 5th to 2nd. [Australia is aiming to be top of mind for Chinese travelers](#). Japan has two cities in the top 10 when looking at a city perspective, while the cities seeing the biggest travel booking increases are Macao and Osaka.

Top APAC destinations for travelers from mainland China



	2024 Rank	2023 Rank	2024 vs 2023
 SEOUL	1	1	602%
 TOKYO	2	5	728%
 HONG KONG	3	3	414%
 BANGKOK	4	2	295%
 TAIPEI	5	4	330%
 SINGAPORE	6	6	466%
 OSAKA	7	9	2181%
 SYDNEY	8	8	1324%
 KUALA LUMPUR	9	7	659%
 MACAO	10	10	2304%

Source: Sabre Market Intelligence MIDT

THE IMPACT OF VISA-FREE AGREEMENTS

Since the start of the pandemic, China was essentially closed for both inbound and outbound travel. Since January 2023, that has been changing rapidly, with visa-free agreements continuing to evolve and expand into 2024.

China recently signed a mutual agreement on 30-day visa-free travel with Singapore, which became effective from February 9th, allowing entry for business, travel, leisure, and sightseeing. Thailand and China agreed to a similar arrangement, effective March 1st to replace a temporary visa suspension which ended in February. Thailand immediately felt the benefit of the arrangement in 2023 but has dropped a little in the rankings as more agreements come in place, giving travellers more choice.

Other recent announcements include a unilateral 15-day visa waiver pilot scheme for citizens from France, Germany, Italy, the Netherlands, Spain, and Malaysia, due to last until November this year. There is also a 15-day visa free entry scheme for citizens from Switzerland and Ireland. China and Russia also resumed cross-border visa-free policies for tour groups. China and Georgia agreed to waive visa requirements for travelers, starting May 28.

The agreements appear to be having an impact on outbound and inbound travel, particularly for SouthEast Asian travel.

Singapore has seen a 466% increase in inbound bookings from China, and a 461% increase for trips in the opposite direction, when compared to 2023. Travel from mainland China to Malaysia has increased by 651%, and has enjoyed 886% increase for travel from Malaysia to mainland China. Travel to Russia increased by 758% and from Russia to mainland China by 677%.

However, travel to and from China certainly isn't limited to countries with visa-free arrangements. Chinese travellers are embracing more flexibility to travel, even if they need to apply for a visa on or before arrival. Outbound travel and bookings from mainland China to Australia, for example, are up 1000%, while travel to Indonesia is showing a close to 600% increase, Britain as a destination is up by 525%, and India is enjoying a 520% increase.

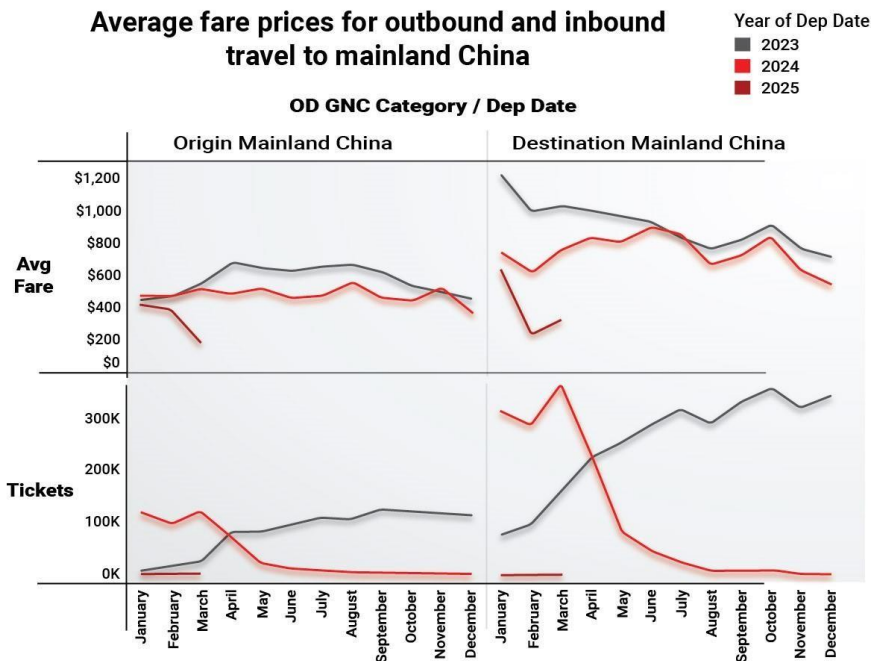
CAPACITY IS UP ...

Airlines are increasing capacity to meet demand. International capacity originating from China increased by 280% year over year in the first quarter of the year, with the largest increases coming from key hubs like Beijing, Shenzhen and Chengdu which saw capacity increase by 400%, 560% and 3200% respectively. These hubs also saw inbound capacity increase significantly by 400%, 560% and 3300%.

... AND FARES ARE DOWN

As capacity is increasing and supply and demand are achieving greater equilibrium, fares for routes from mainland China are priced lower across the board when compared to 2023, making travel more affordable for Chinese travellers. For quarter one 2024 travel, the difference was up to -73% and -71% on key routes, with the most significant decreases in fare cost being from Shanghai to Seoul, and Shanghai to Tokyo.

Lower fare prices are seen across most of 2024 and, as bookings are made for 2025, we're also seeing the trend for lower fares continue into the New Year.



Source: Sabre Market Intelligence Ticketing

TRAVELLING IN CLASS

While fare prices are down, many Chinese travellers are happy to pay more to elevate their travel experience. Business Class travel is just fractionally below 2019 in terms of percentage of travel booked, at 3.6% for 2024, compared to 3.7% for 2019. While first class travel is down by 0.4%, premium economy travel is up by 0.8%, indicating opportunities for airlines and agencies to cater to passengers who want to upgrade their usual experience.

Source: Sabre Market Intelligence Global Demand

EMBRACING GLOBAL TRAVEL AGAIN

While 2023 was the year of re-opening for China, Sabre's research shows 2024 is the year Chinese travelers are really embracing global travel again in significant numbers. What is important now is that the travel industry ensures it can deeply understand what travelers from China want, where they want to go, how they want to get there, and the experiences they want to have when they reach their destination.

Those who really make the time and investment to understand and deliver these needs will be the ones who win the hearts, minds, and spending power of Chinese travellers in 2024, and into the future. When you consider that only around 13% of Chinese citizens currently have passports, but increasing numbers are applying for a passport with each passing year, the importance of Chinese travelers for all sectors of the tourism industry can only increase.

With Chinese travelers showing clear demand and confidence in global travel for 2024, which is visible in Sabre's outbound travel insights, the tourism world is surely delighted to welcome them back.

Data sources: Sabre Market Intelligence MIDT, Sabre Market Intelligence Ticketing, OAG Air Capacity, Sabre Market Intelligence Global Demand (all data up to March 31, 2024).