


Outbound Rebound 2023

The Return of Chinese Travelers

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Indeed, affluent Chinese travelers are eager and ready to see the world again.

But as they prepare to explore the world, what are the changes in their preferences, concerns and purchase influences? How can we address these changes? What are the new opportunities?

Before the pandemic, China was the world's largest source of outbound tourists and by all indications, will continue to be a powerhouse in global tourism. As China reopens its borders, the world is ramping up to welcome back Chinese tourists.

But after almost three years living with restrictions that affected even day-to-day life, how has the Chinese tourist changed? How will these changes impact the products and offerings of travel stakeholders around the world this year and beyond?

It is for this reason that FINN Partners and CSG Research collaborated on a deep-dive research that aims to glean insights into the changes in behaviours, needs, preferences, decision-making and expectations of the affluent Chinese travelers. This survey, with a very robust sample size of over 2,000 affluent respondents, was conducted right on the heels of the Chinese government easing travel restrictions in January 2023 to better reflect sentiment and consumer insights.

The report is extensive and comprehensive, covering multiple areas including travel intention, destinations, accommodation, transportation, loyalty program, among others. The intent is to address the Chinese outbound travel market that is anticipating a faster-than-expected revival, and reveal insights that can lead to opportunities and actionable information the global industry will find useful.

Key Takeaways

The pandemic has not dented the eagerness of affluent Chinese to travel, spend and enjoy life. Positive sentiment towards travel is not merely a function of pent-up demand, but backed by economic optimism. With borders open, they intend to intend to boost their pre-pandemic pace of overseas travel — traveling more frequently (at an average of 5.9 trips) and indulging in longer vacations (an average of 8.7 days per trip).

There is strong intention to revisit destinations where they had positive experiences and fond memories, though they are also keen to venture to exotic destinations that have piqued their curiosity. Safety remains a top concern three years into the pandemic and will continue to influence destination choices.

The world's highest-spending travel segment is ready to splurge on luxury, style and elevated comfort. Affluent Chinese travelers plan to increase spending by 15%, with over 30% of respondents planning to fly first or business class; while one in two choose to stay in upscale or luxury hotels.

"Staycations" remain more popular, with 80% planning to continue domestic travel, and one-third expecting to take between four to ten staycation trips over the next 12 months.

Chinese travelers are seeking slow, recuperative travel and want to spend time basking in nature. They plan to travel like locals — immersing themselves in the local culture, go on more road trips, and attend more events during future trips. 56% are keen to incorporate wellness in their holidays.

Hotel brands are becoming a deciding factor in destination choices, especially among younger travelers, who plan their vacations around locations where their favourite hotel brand has a property.

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Experience is priority, and good experience drives loyalty. Affluent Chinese travelers will stay in hotel or resort brands where they have had good experiences in the past. Ratings and positive word-of-mouth also impact hotel selection.

They wear their loyalty memberships like a badge of honor. This segment is after exclusive privileges, not rewards and special discounts.

Basic is not sufficient. **They seek tasteful design and extensive room amenities** ranging from luxury sleep sets to a well-stocked minibar.

It is not all mobile or digital. While online channels are important for information gathering and booking, offline channels remain crucial. Travel agents remain important in finalizing travel plans.

The expectation on the role of hotels has also expanded. **Affluent Chinese travelers hope to socialize and meet new people in the hotels they stay in.**

While there is an increase in spontaneous travel (17% of respondents take less than one week from planning to booking), 60% have a booking lead time of between one and three weeks. However, Chinese travelers generally start planning well in advance, and gather extensive information from multiple sources.

Survey Methodology

We surveyed 2,026 affluent Chinese travelers via a 20-minute online questionnaire between 10 and 24 January 2023.

Respondents were shortlisted through a pre-qualification screening to ensure data quality.

Among the 2,026 travelers, 1,524 came from Tier-1, Tier-2 and Tier-3 cities across mainland China, while 502 affluent travelers in Hong Kong were also surveyed as independent samples for contrast and comparison purpose.

Respondent Profile - Mainland China

All respondents
intend to travel
in the next 12 months

5.6
Overseas trips taken in 2019

All respondents
stayed in luxury hotels
for leisure trips in the past 12 months

> RMB 50,000
spent on luxury products in the past 12 months

43%
from Tier-1 cities
33% from Tier-2 cities
24% from Tier-3 cities

44%
Male
56% female

33.8
Average age

91%
Married with children aged under 12

96%
Own a house and a car

2.9
Average COVID-19 vaccine doses taken

RMB 1.4 million+
Average household income

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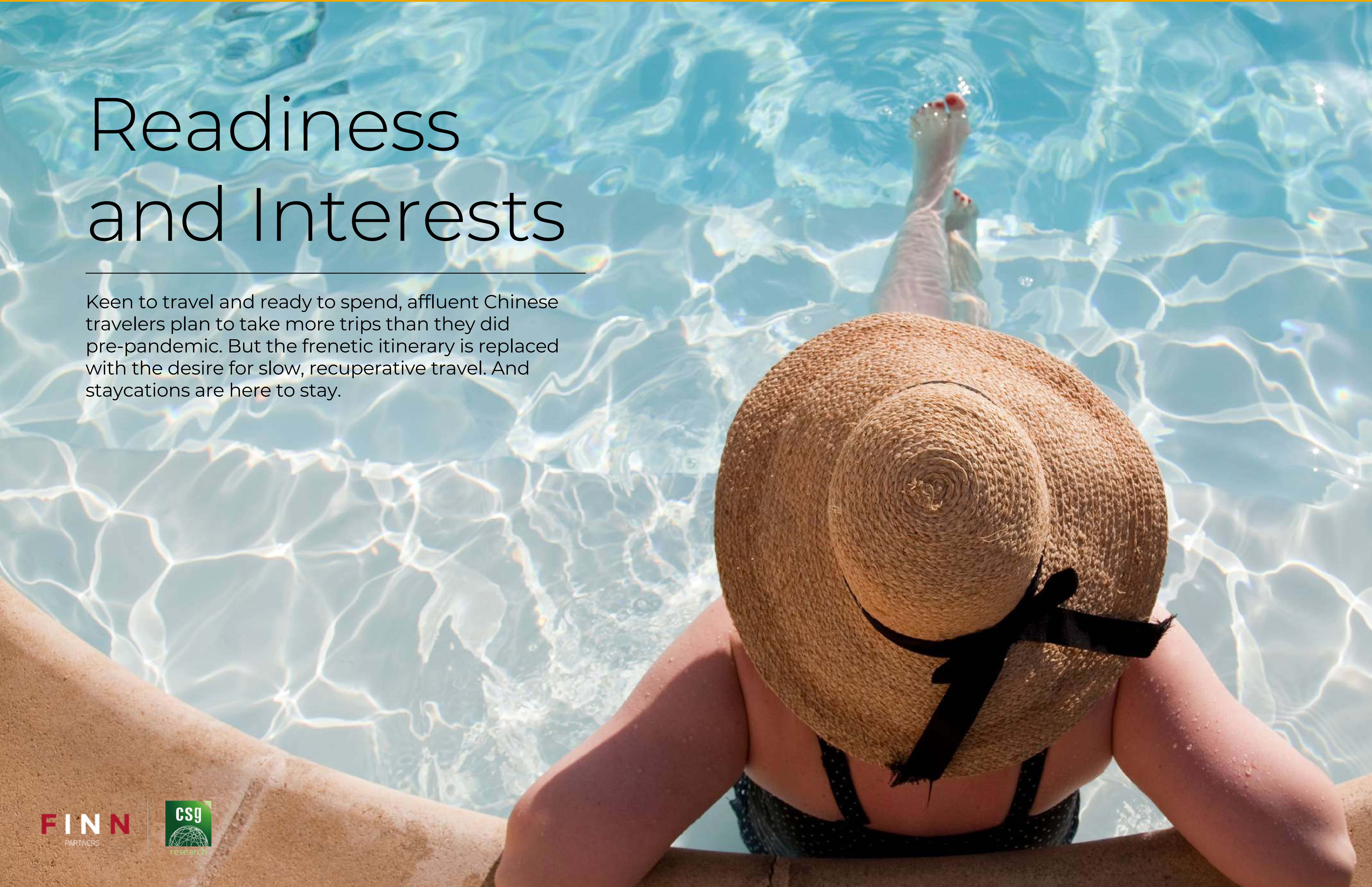
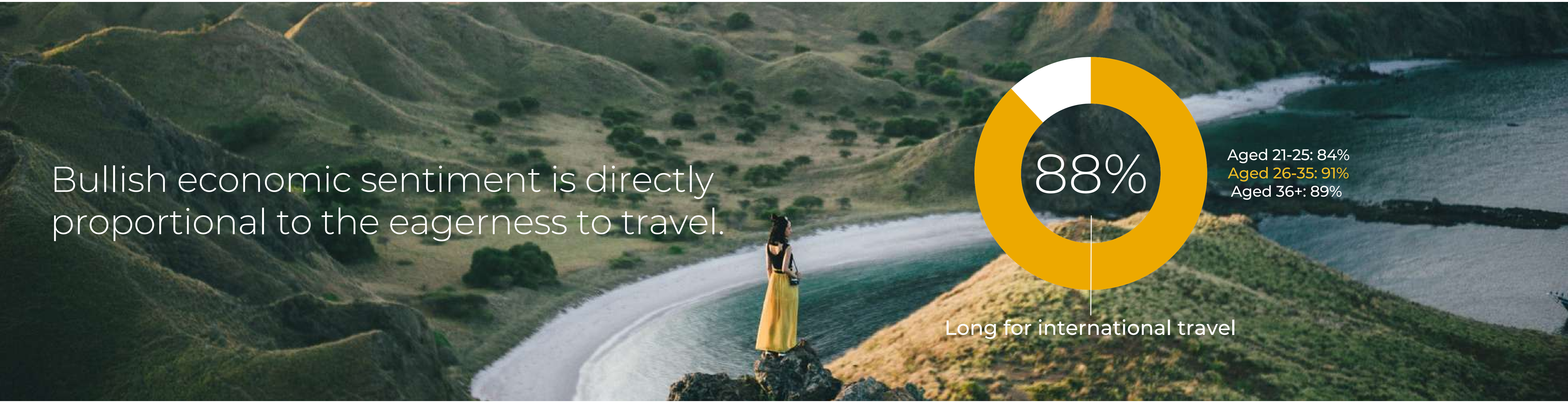
Readiness and Interests

Keen to travel and ready to spend, affluent Chinese travelers plan to take more trips than they did pre-pandemic. But the frenetic itinerary is replaced with the desire for slow, recuperative travel. And staycations are here to stay.



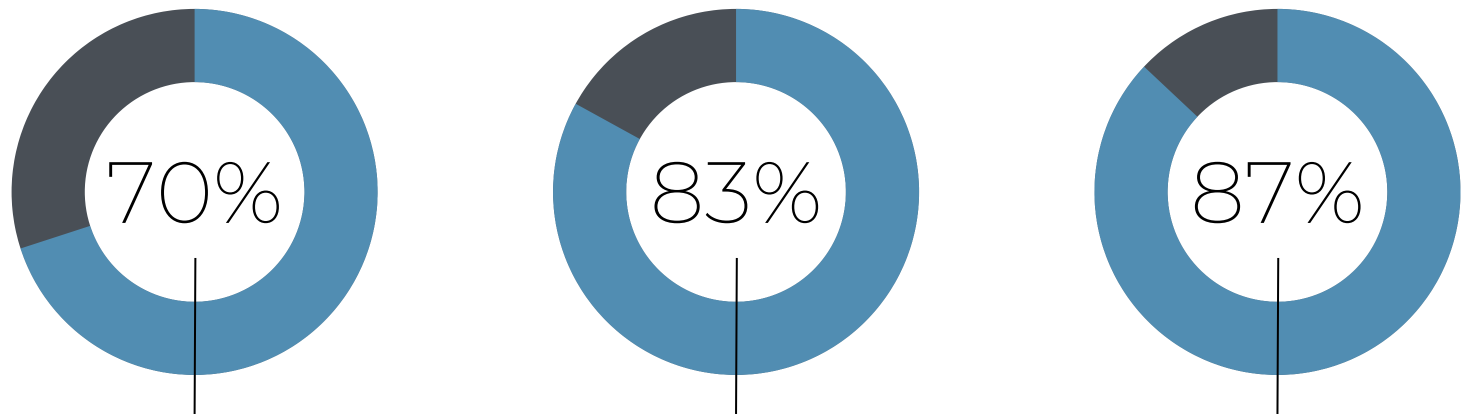
Bullish economic sentiment is directly proportional to the eagerness to travel.



Most respondents are eager to go on the road, or up in the air, with **88% of respondents saying they miss international leisure travel. This sentiment is dominant in the 26-35 age group.**

The strong sentiment to travel is not merely pent-up demand, or so-called "revenge travel". With 70% of respondents very confident about the economy of China, and 87% saying they are satisfied with life in general, **there is basis to believe that the increase in travel frequency, duration and related spending can be sustained.**

In contrast, our parallel survey data shows that only 44% of respondents in Hong Kong are confident about economic prospects.

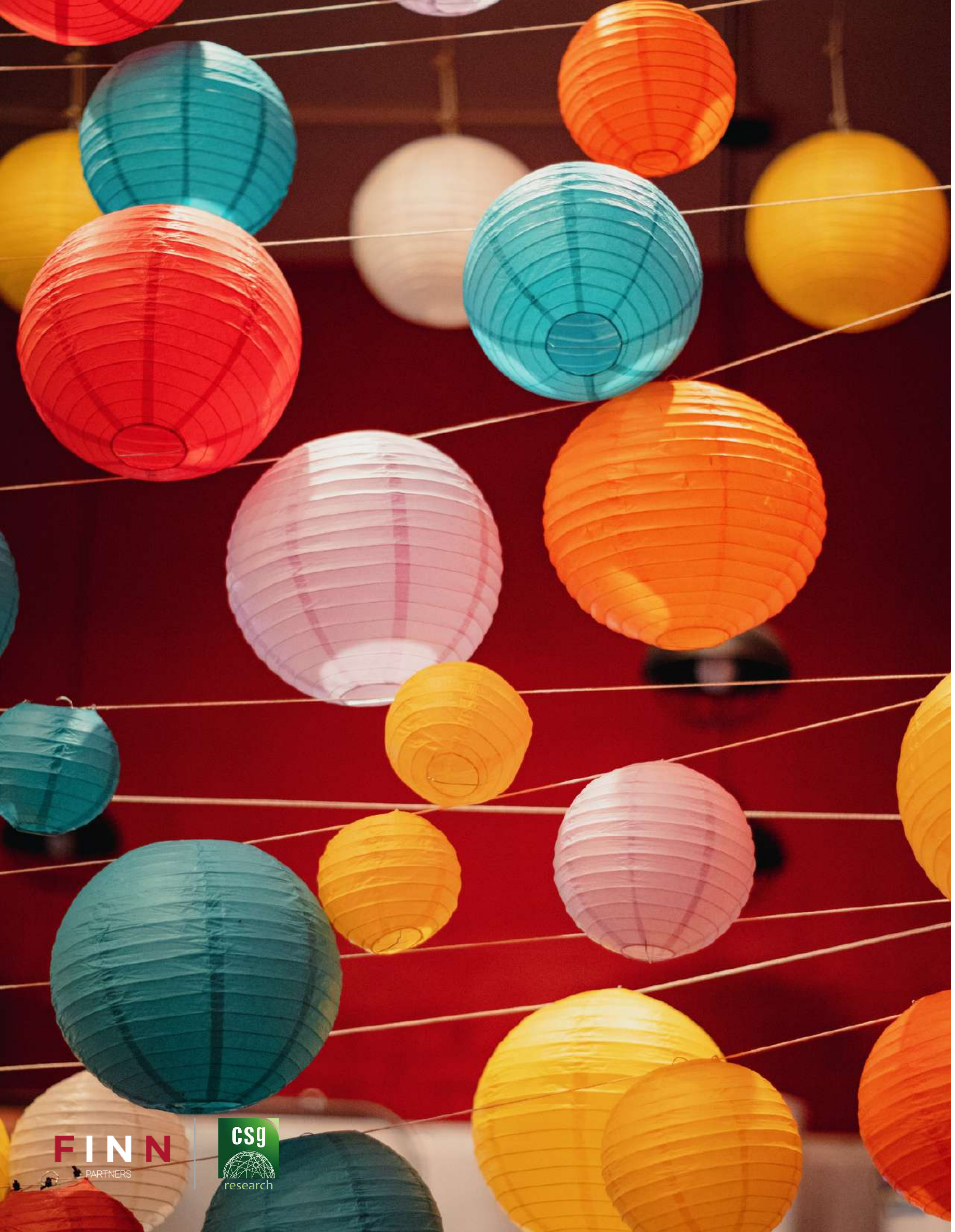


Optimistic towards China economy

(versus 44% among Hong Kong respondents)

Believe 2023 is a year of recovery and growth

Consider themselves “quite happy” or “very happy”



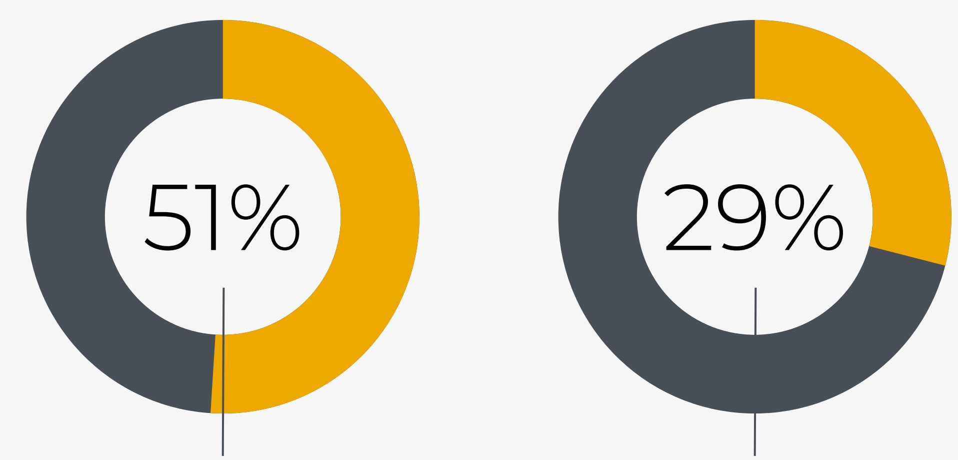
Holiday travel takes priority.

Over half of respondents said they are planning a holiday overseas, while one-third said they want to travel abroad to reunite with family.

The desire for leisure travel overseas is particularly evident among respondents from Tier-2 cities and those aged 36 or above.

On the other hand, over 35% of younger travelers, or those aged 21-35 years old, plan to travel to visit/ reunite with family abroad.

Immediate travel plan as
international travel restrictions eased



Travel for holiday/ leisure

Aged 21-25: 42%
Aged 26-35: 54%
Aged 36+: 56%

Tier-1 cities: 51%
Tier-2 cities: 55%
Tier-3 cities: 45%

Travel to reunite with family

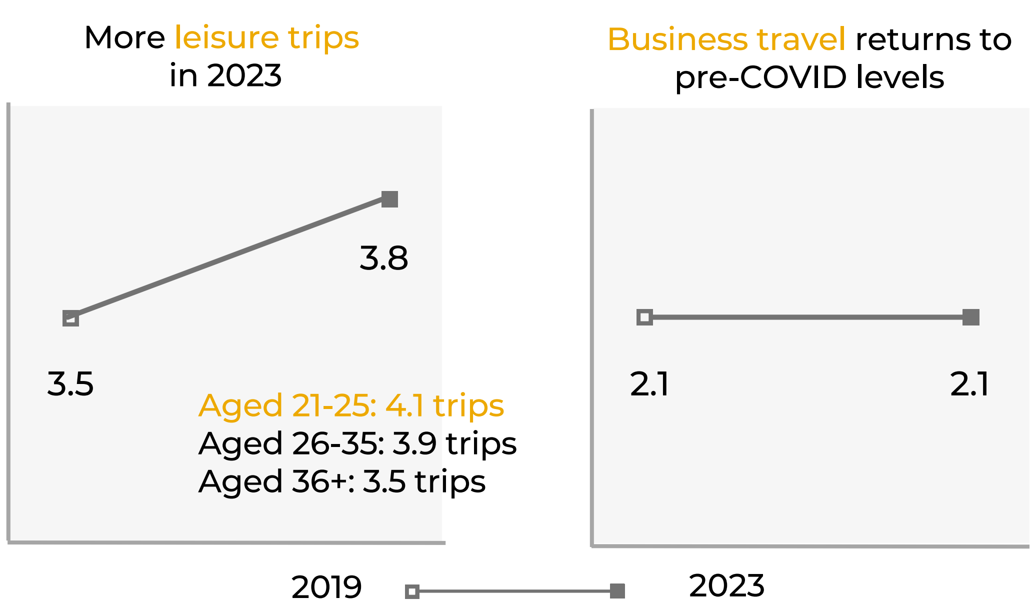
Aged 21-25: 35%
Aged 26-35: 31%
Aged 36+: 23%

More leisure trips and business travel set to return to pre-COVID levels

One in two affluent Chinese are making plans for at least five trips in 2023 — a four percentage point growth from 2019. **On the average, they are planning to make 5.9 trips in 2023**, up from 5.6 trips in 2019. As a point of reference, Hong Kong travelers are planning to make only 4.6 trips in 2023.

Two out of three trips are leisure-focused. On the average, respondents from China are planning 3.8 holiday trips in 2023, an increase from 3.5 trips in 2019. In comparison, their counterparts in Hong Kong plan to make only 3.0 leisure trips in 2023. While the **26-36 age group shows the most significant increase** — from 3.4 leisure trips in 2019 to 3.9 in 2023, **those aged 21-25 plan to travel as frequent as 4.1 times on the average**.

Anywhere outside of China, business travel is facing a slower return. However, Chinese travelers expect to make the same number of international business trips in 2023 - a total of 2.1 trips - as they did in 2019.



Longer stay, slower pace.
Experience over things.

Not only are the affluent Chinese planning to travel more often, **they are also ready to increase their average travel duration per trip to 8.7 days** (compared to 8.4 days in 2019). It is **28% longer than the 6.8 days made by their counterparts in Hong Kong for 2023.** While 40% of affluent Chinese travelers are planning to stay for eight days or longer, **the 21-25 age group is ready to indulge themselves with a longer holiday with an average duration of 9.3 days**.

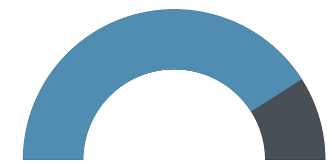
Gone are the rushed, major attractions-packed tours as the affluent Chinese evolve from tourists to travelers. **Over 70% of respondents desire slow, recuperative travel over an itinerary filled with activities,** while one out of two prefer staying in a location for a longer period of time, experiencing the destination like a local.

Eight out of ten travelers are more willing to pay for experiences over tangible products, particularly respondents from Tier-3 cities (86%). This points to the growing potential of authentic and personalized travel experiences, where one savors the local sights, sounds and culture.

Average length of leisure trips

8.7 days

Aged 21-25: 9.3 days
Aged 26-35: 8.6 days
Aged 36+: 8.4 days



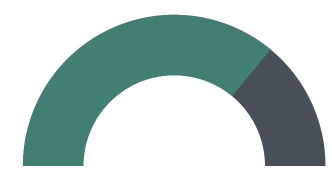
Respondents who prefer experiences over material things

82%

Tier-1 cities: 82%
Tier-2 cities: 80%%
Tier-3 cities: 86%

Respondents who prefer spending less time flying and staying longer in one place

55%



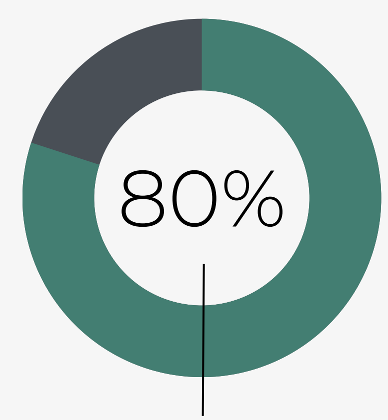
Respondents who prefer slow, recuperative travel over activity-packed itineraries

72%

Despite indications of a rebound in outbound tourism, domestic travel continues to grow.

Local travel has evolved and diversified during the pandemic with new destinations, new experiences, and new trends, partly as a result of the government's progressive 14th Five-Year Tourism Development Plan.

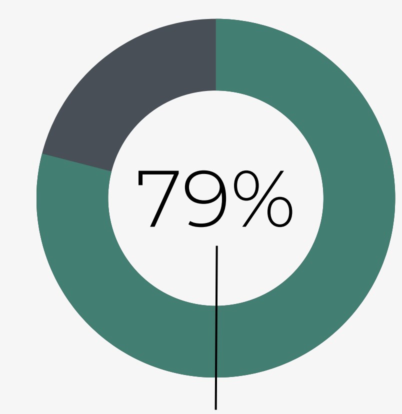
Even as restrictions on international travel are lifted, the wealthy Chinese remain interested in domestic leisure travel, planning to go on **an average of 3.8 staycations in the next 12 months,** compared to 3.4 in 2022. **79% also plan to go further** and visit destinations at least five hours away.



Plan to travel within China for leisure (domestic tourism)

3.8

staycation trips in the next 12 months



Plan to visit desinations 5 hours away

Pre-pandemic, Chinese tourists were the world's biggest travel spenders. Now, they plan to spend even more.

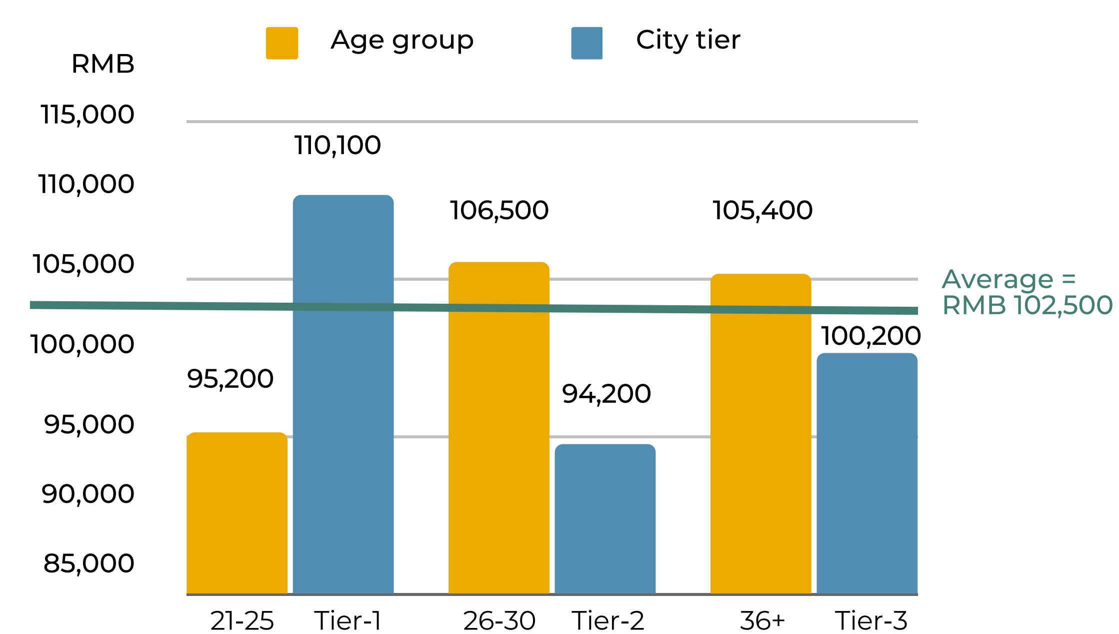
Keen to travel and ready to spend, the **wealthy Chinese travelers are budgeting an average of RMB 102,500 (USD 15,299) for travel in 2023**, 15% higher than the average actual spend of RMB 88,800 (USD 13,254) in 2019.

Their budget is 22% more than the budget of HKD 95,400 (or USD 12,163) set aside by Hong Kong travelers.

The well-heeled segment (or the top 20% percentile) is prepared to spend much more — an average of RMB 284,000 (USD 42,388) in 2023.

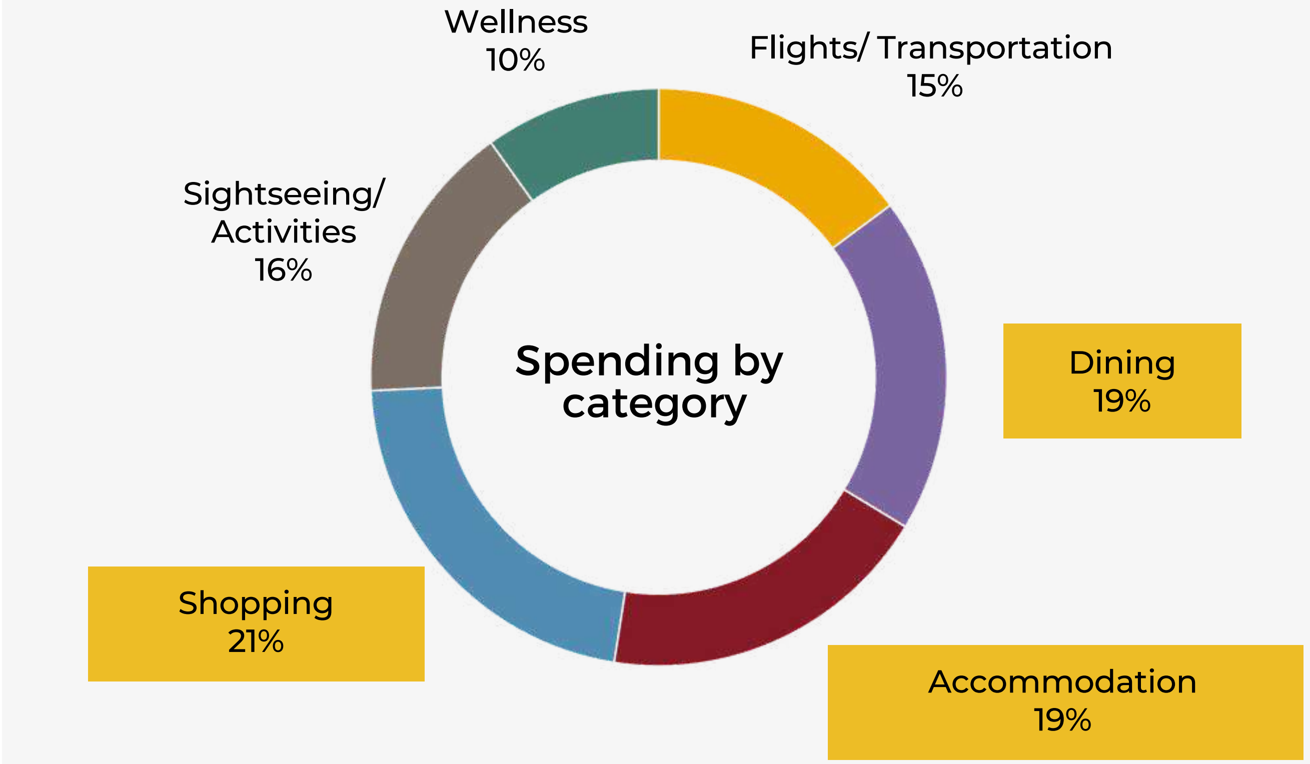
The **26-35 age group has the largest travel budget** of RMB 106,500 (USD 15,896), a 23% increase from 2019. **Those from Tier-1 cities have a higher propensity to spend — with an average travel budget of** RMB 110,100 (USD 16,433) in 2023, marking an 18% increase versus the 2019 level.

Travel budget in 2023



No significant change in the travel budget breakdown.

Shopping, dining and accommodation remain the top three expenditure items that take up the lion's share of travel expenses. This **spending breakdown is consistent across different city tiers and age groups.**



Destinations and Passion Points

The desire to revisit evergreen destinations and explore bucket list landmarks is strong, albeit highly influenced by safety and public health concerns. As more mainland Chinese travel to explore and enjoy nature, connecting with locals and going on road trips or wellness experiences become more relevant.

In 2023, affluent Chinese travelers want to revisit places they enjoyed in past trips. They are keen to repeat the good times and pleasant experiences in these destinations...

Nostalgia reinforces revisit intentions. It is fair to say that post-pandemic travelers long to go back to places they have missed most.

In the next 12 months, they will **prioritize evergreen destinations — popular locations they have already been to and have had good experiences.**

The most popular short-haul and long-haul destinations Chinese travelers plan to visit in the next 12 months

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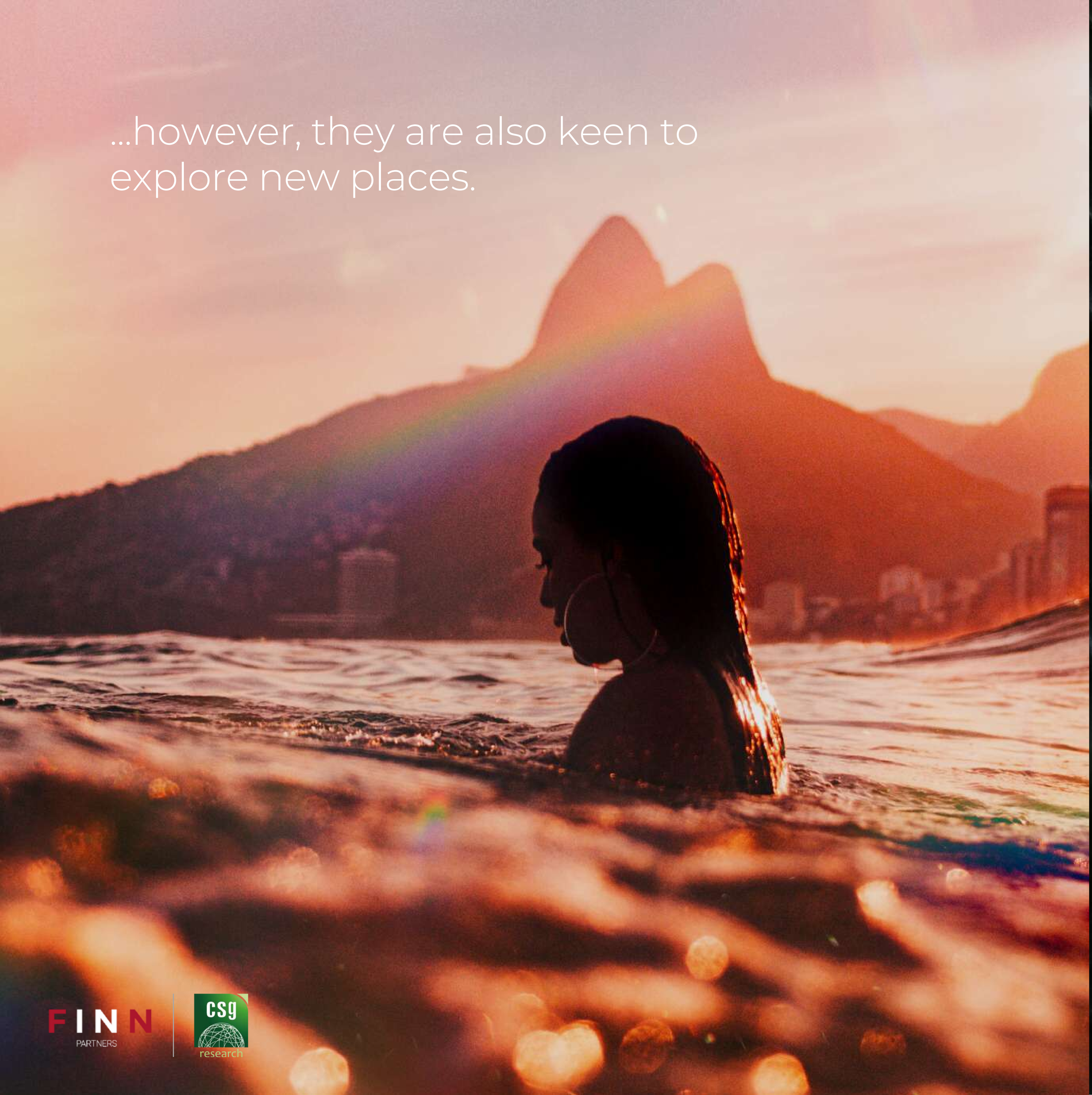
Short haul:	Long haul:
Hong Kong	United States
Macau	New Zealand
Japan	Canada
Singapore	United Kingdom
Thailand	Australia
South Korea	France

...however, they are also keen to explore new places.



The most popular bucket list destinations

Brazil
Argentina
Mexico
Egypt

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Destinations with the highest satisfaction levels among affluent Chinese travelers

Maldives	**92%**
Singapore	**90%**
Japan	**89%**
New Zealand	**89%**
Hong Kong	**88%**
Canada	**86%**
France	85%
Australia	85%
Macau	84%
Thailand	84%
Malaysia	84%
United States	83%
United Kingdom	83%
South Korea	77%
Taiwan	75%

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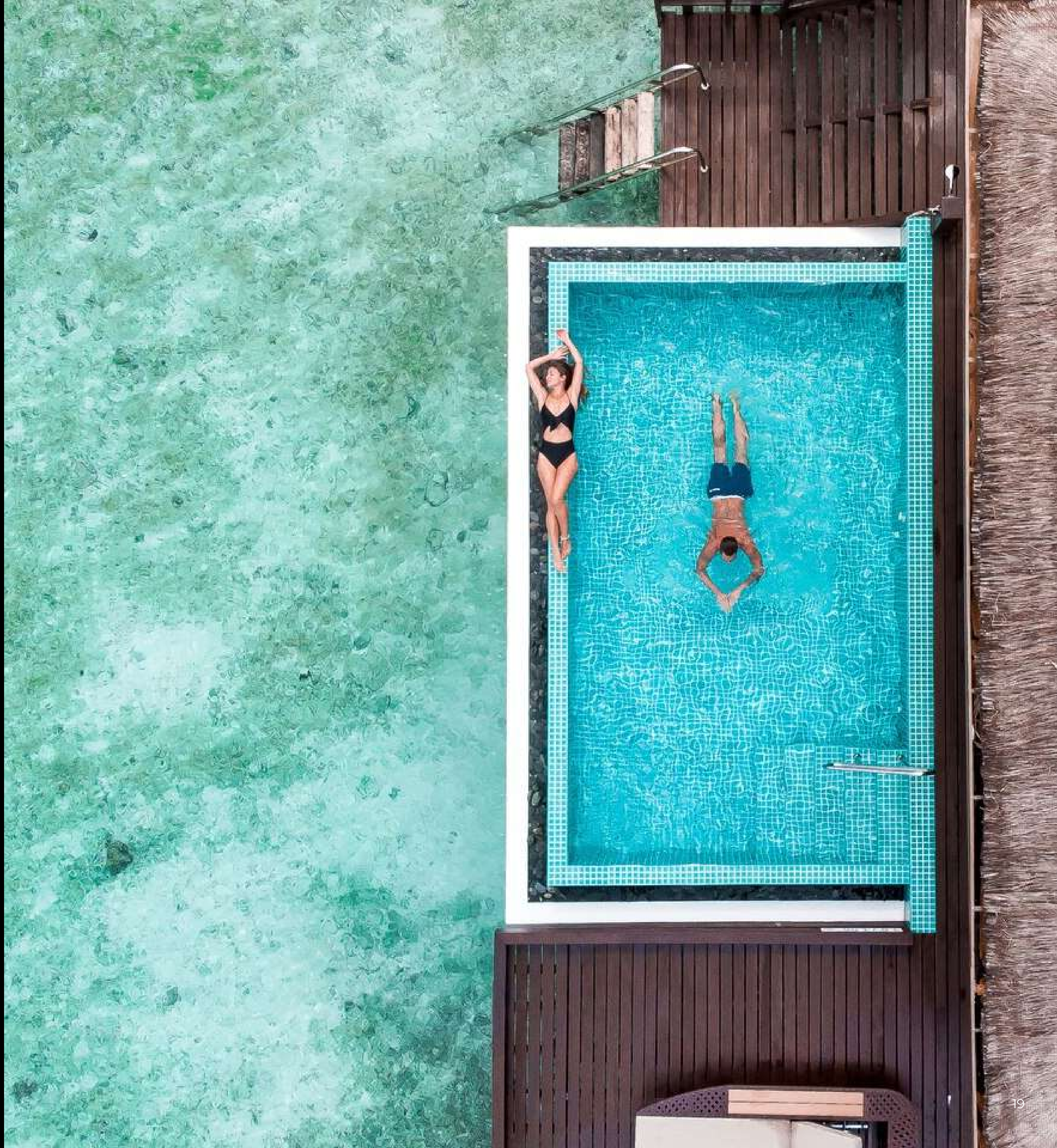

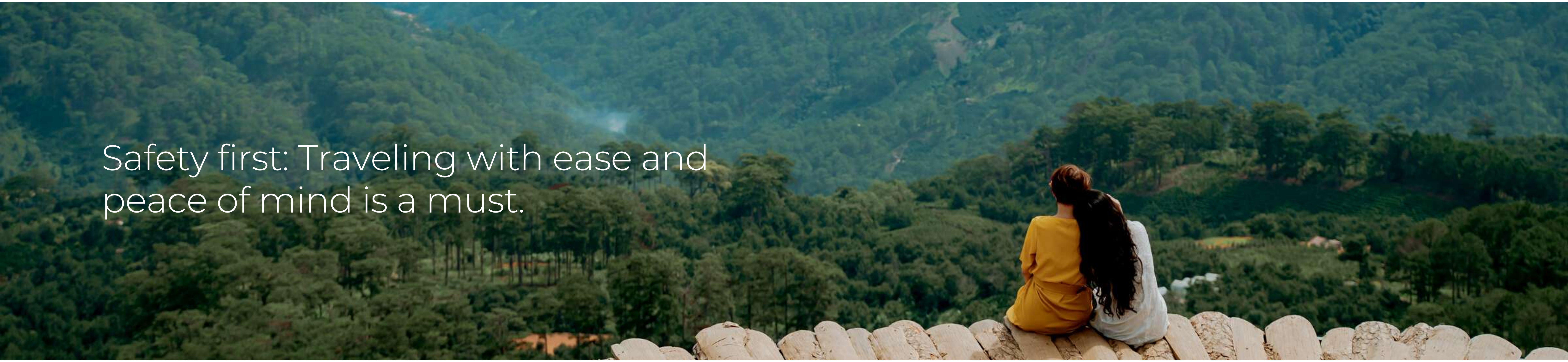

Safety first: Traveling with ease and peace of mind is a must.

Travelers have more to consider when choosing a destination in the post-pandemic era. From a fresh wave of COVID-19 infection, natural disasters and calamities, to a surge in bias-motivated incidents and geopolitical tension, safety is the top concern of most travelers. To a large extent, it defines the attractiveness of a destination.

This prompts destination marketing to go beyond merely triggering wanderlust, but also addressing practical concerns that play a critical role in decision-making.

Compelling Factors		Deal Breakers	
48%	Safety	56%	Poor safety
41%	Key attractions	39%	Inconvenient local transport system
38%	Connectivity	32%	Harsh entry requirements
37%	Entry requirements	26%	Poor medical support
34%	Availability of desired travel experiences	23%	Volatile geopolitics

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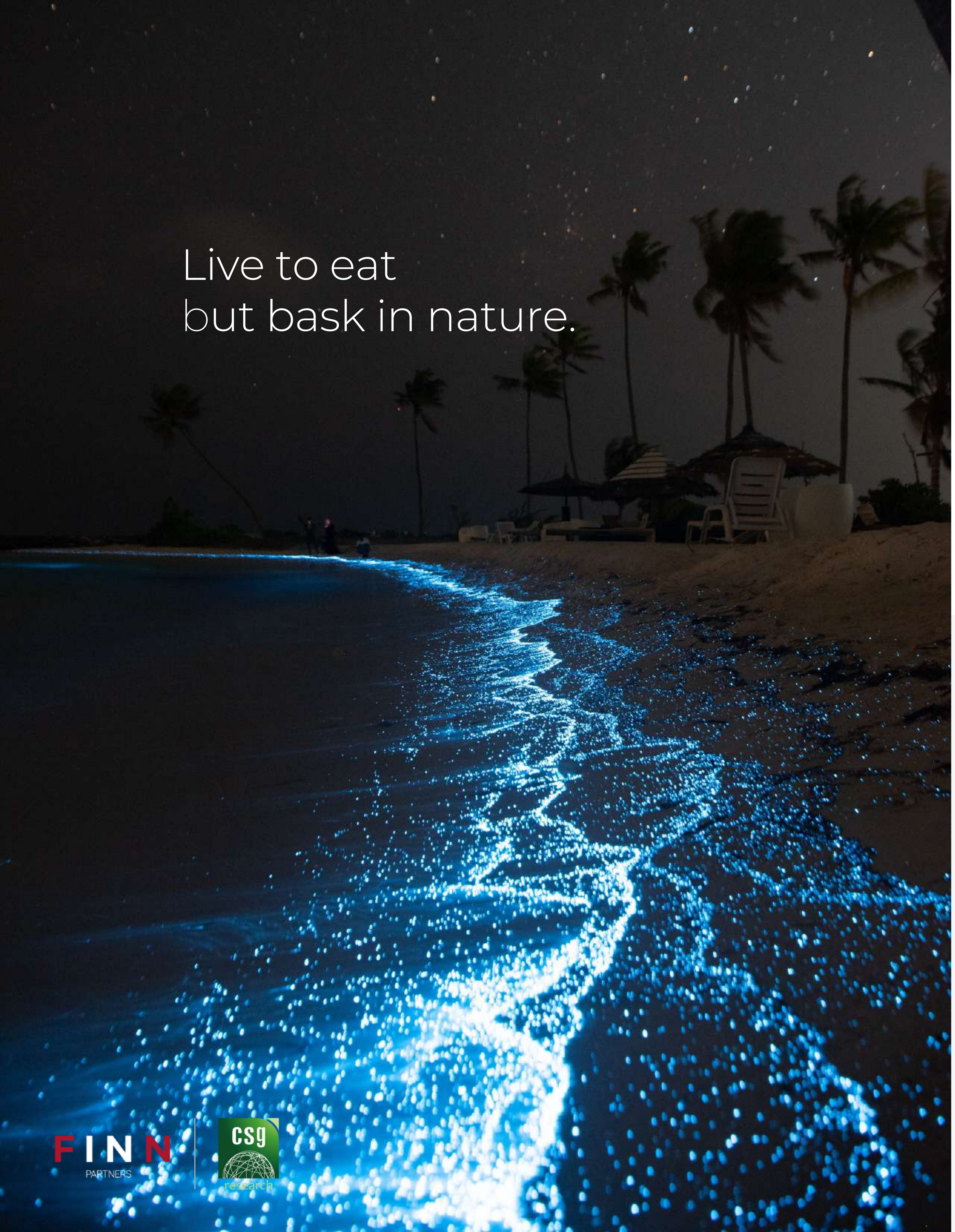


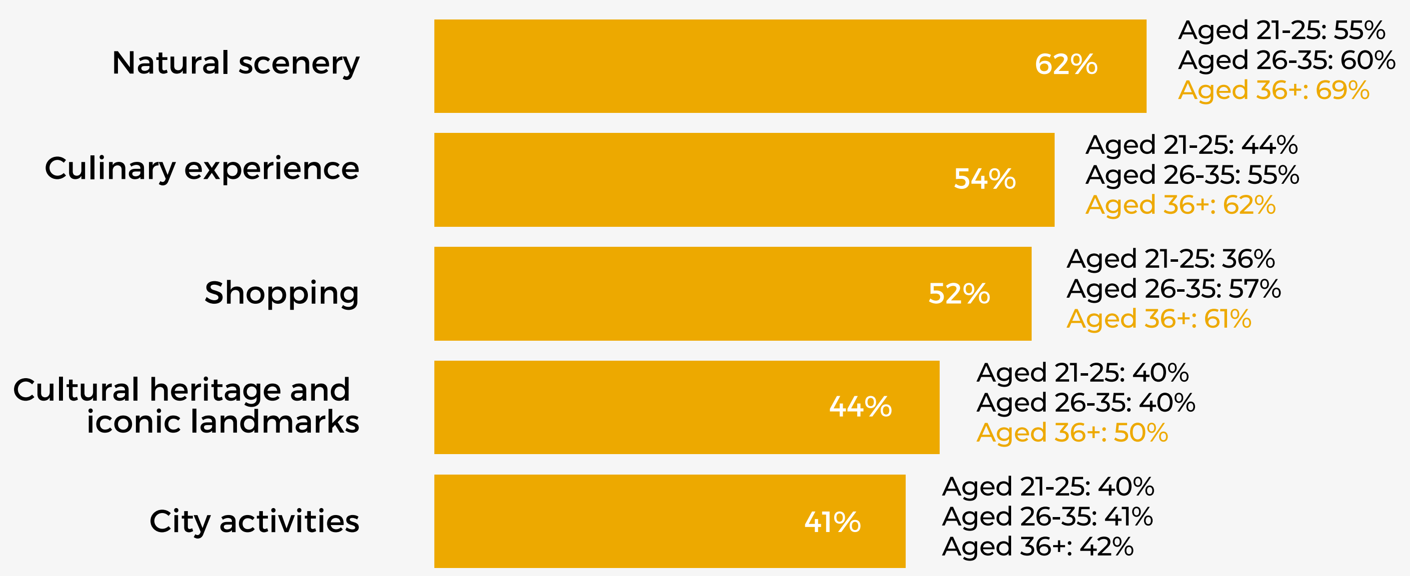
Live to eat but bask in nature.

Camping and outdoor activities have grown in popularity during the pandemic, reflecting a trend towards nature tourism. This trend is expected to stay and extend to outbound travel, with over 60% of travelers considering natural scenery as their first priority, **especially among those aged 36 or above (69%).**

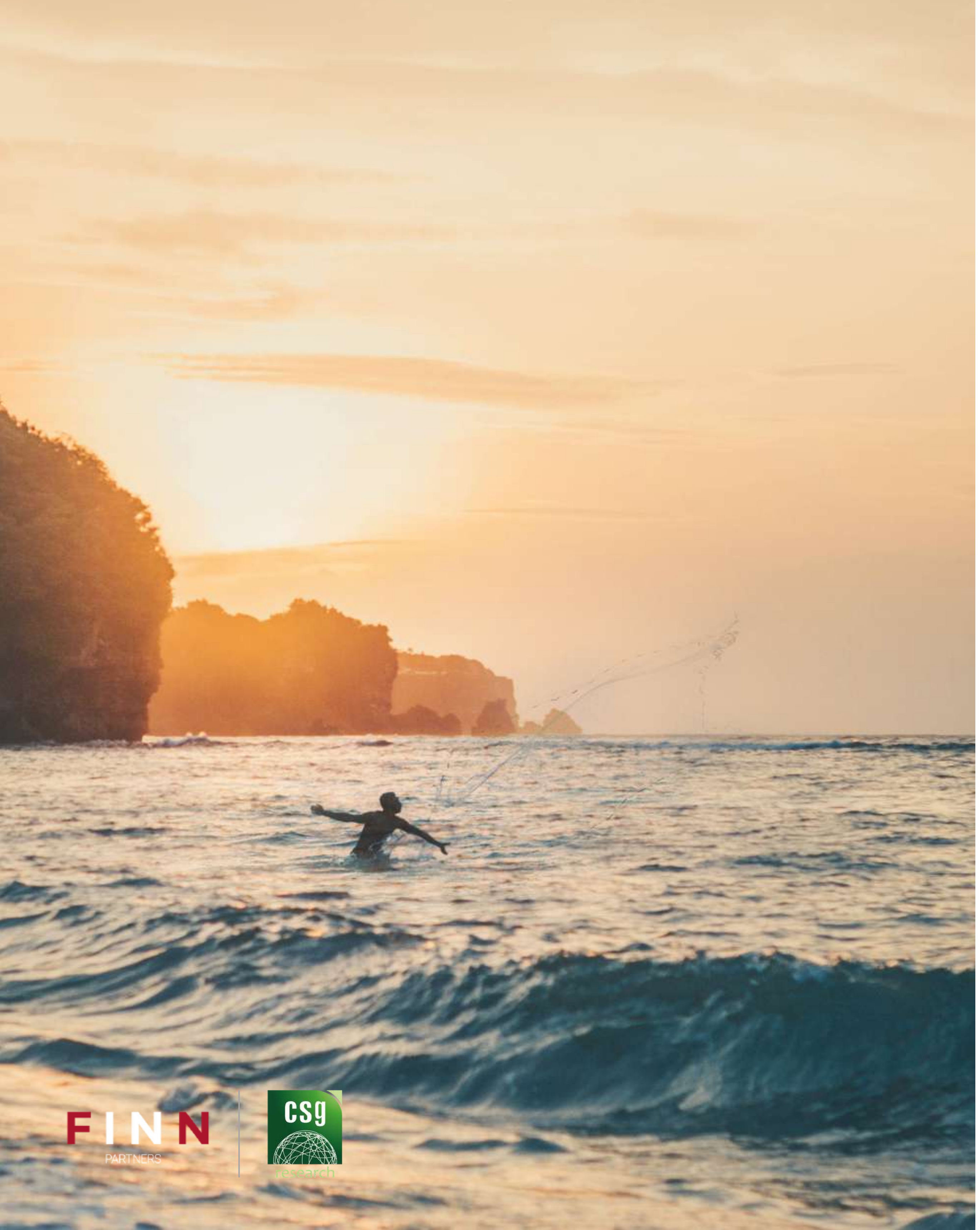
Food or culinary experience is still a strong driver of leisure travel. Interestingly, the older age group (36+) considers it more important than those aged 21-25 (62% versus 44%).

On the other hand, Hong Kong travelers prioritize culinary experience (54%) over natural scenery (52%), though the difference is statistically on par.

Top five passion points of leisure travel



Pandemic-borne travel interests here to stay.

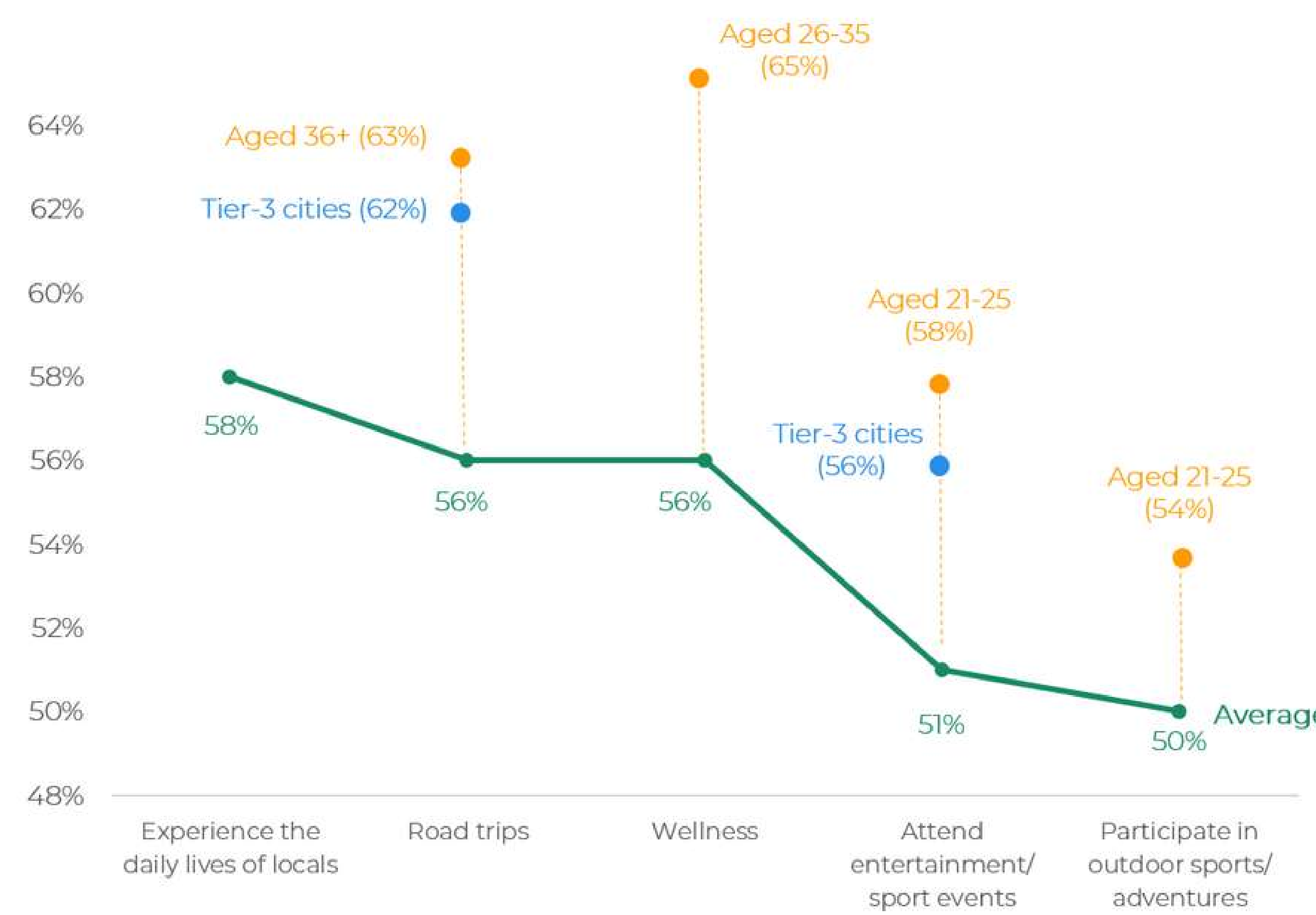


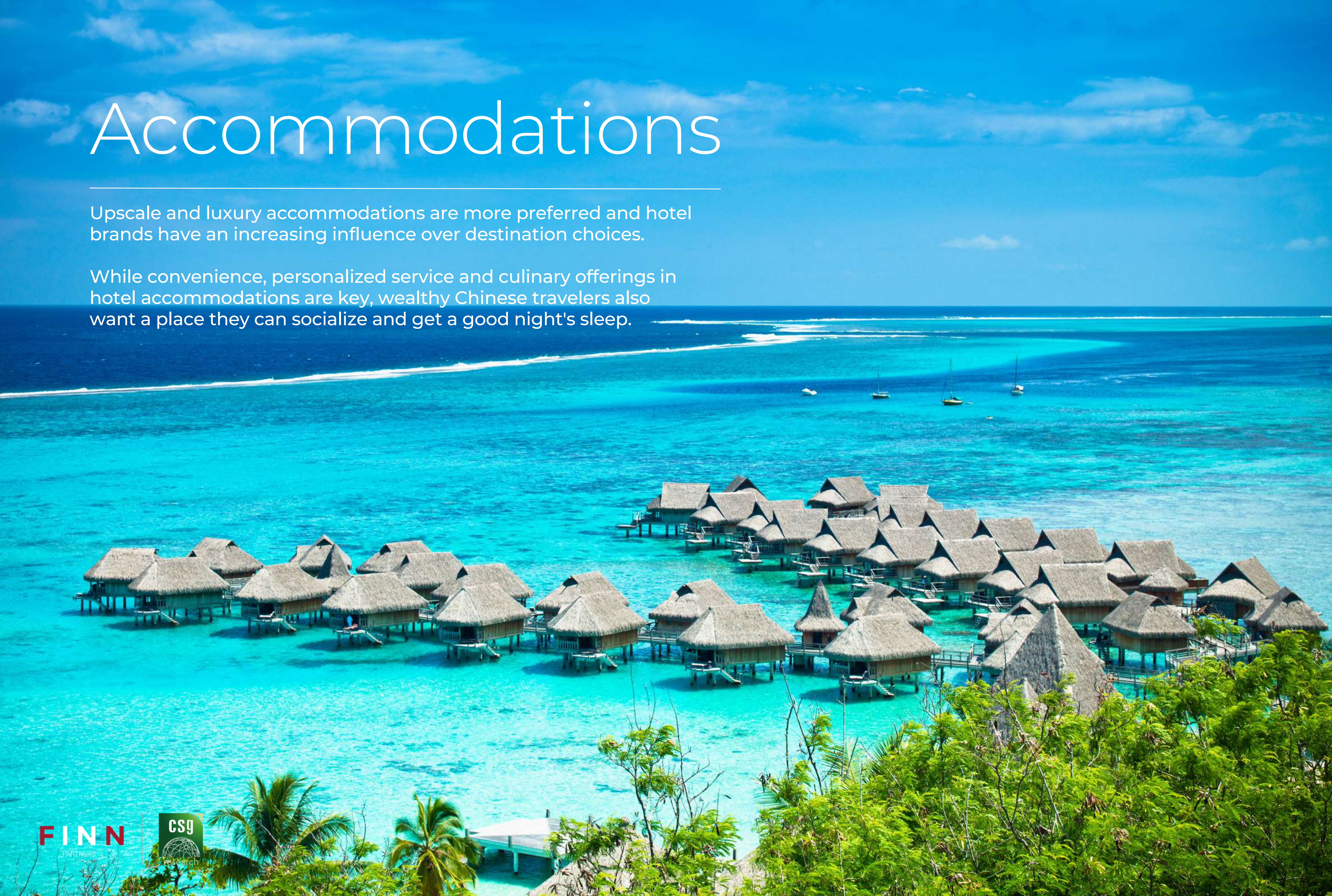
Travelers plan to immerse themselves like locals (58%), take more road trips (56%), take better care of themselves (56%), and attend more events (51%) in their future holidays.

Majority of affluent Chinese travelers in the 26-35 age group are looking for more rejuvenation/ wellness experiences in their next trip (65% versus 56% on the average), while **Generation Z are keen enthusiasts of entertainment/ sport events** (58% versus 51%)**, as well as outdoor sports and adventures** (54%) such as camping, hiking, cycling, and skiing.

On the other hand, those in Tier-3 cities are more interested in road trips (62% versus 56%) and entertainment/ sport events (56%).

Activities to engage more in outbound travel





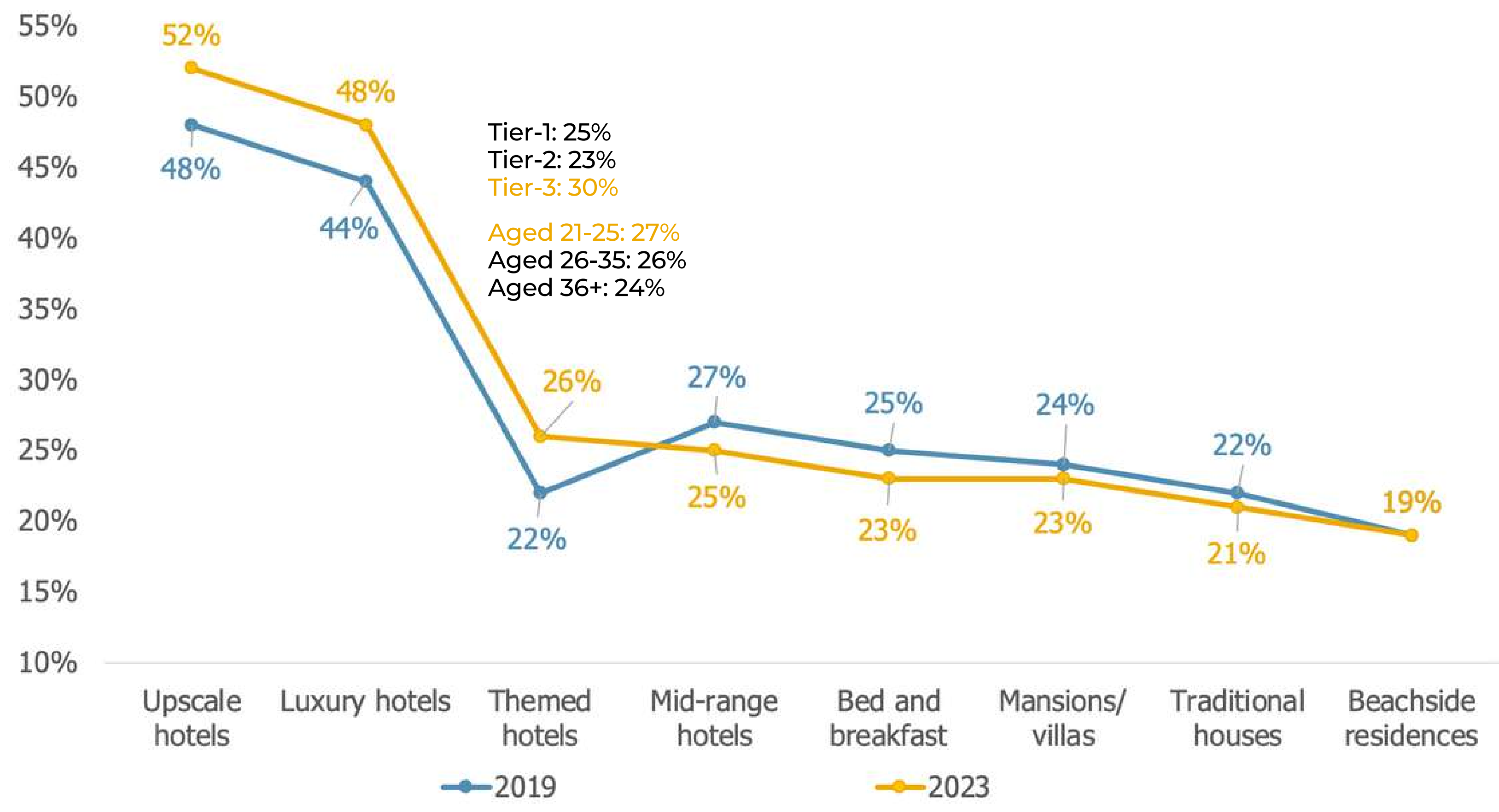
Accommodations

Upscale and luxury accommodations are more preferred and hotel brands have an increasing influence over destination choices.

While convenience, personalized service and culinary offerings in hotel accommodations are key, wealthy Chinese travelers also want a place they can socialize and get a good night's sleep.

Going luxe: affluent Chinese travelers are opting to splurge on accommodations.

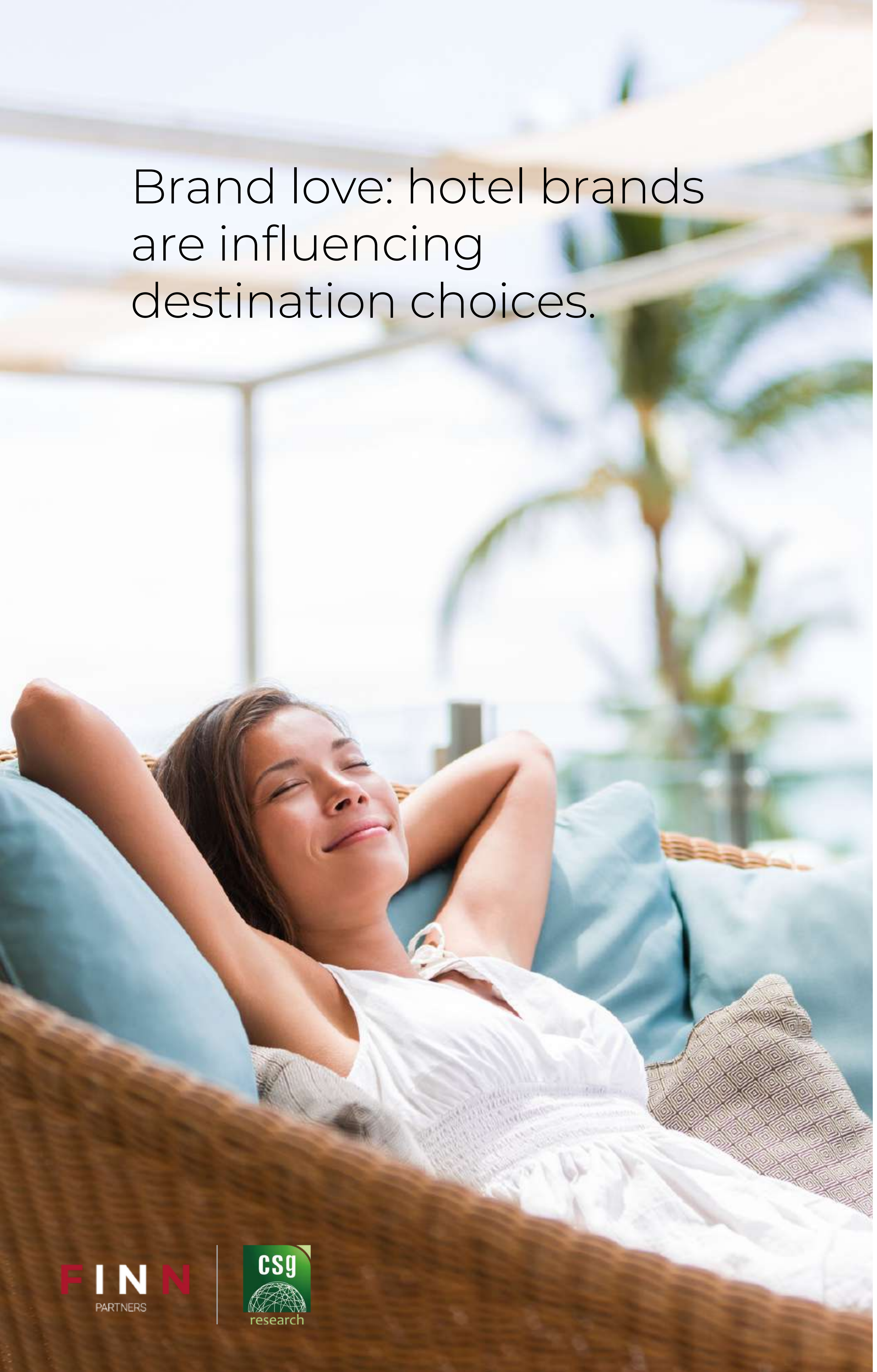
The most preferred types of accommodations



A majority of travelers still prefer hotels and resorts for convenience and familiarity, rather than the non-traditional types of accommodation with strong experiential components. In 2023, one in two travelers plan to stay in upscale and luxury hotels.

On average, special-themed hotels saw a four percentage point jump in preference, with the growth more evident among the 21-25 age group and travelers from Tier-3 cities.

It is worth noting that the rise of glamping in the domestic market does not translate to an increase in the popularity of camping and campervans in the context of overseas travel. Private islands, boats and temples also score less than 10%.



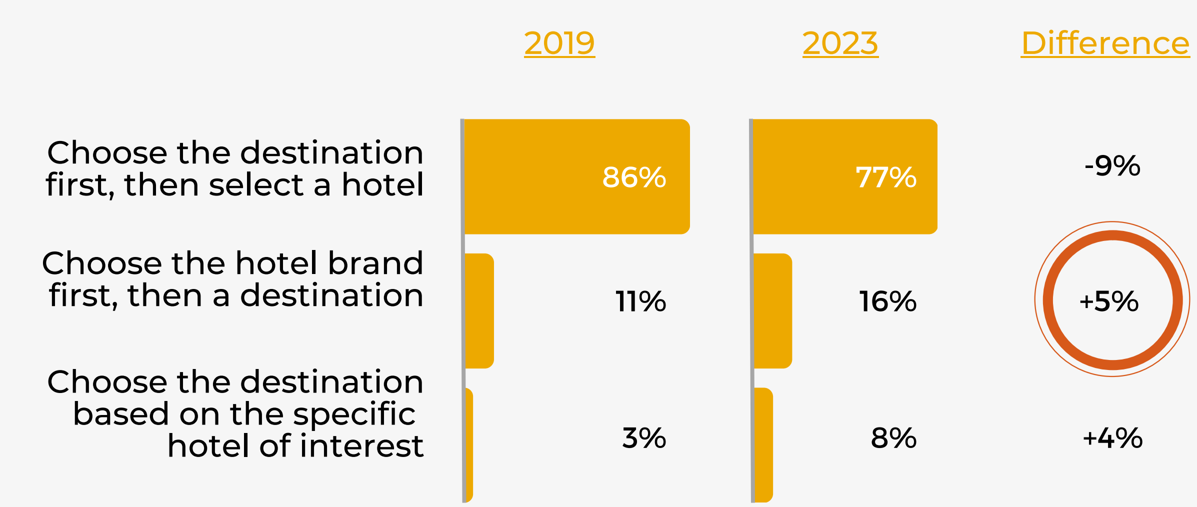
Brand love: hotel brands are influencing destination choices.

Majority of respondents decide on a destination first before making hotel choices. But, this decision process is declining across various age groups. In 2019, 86% of affluent Chinese travelers chose a destination first before selecting the hotel or resort. Today, that number is down to 77%.

Instead, **a brand's portfolio is becoming a deciding factor among savvy travelers,** as 16% choose to plan their vacations around locations where their favourite hotel brand has a property, versus 11% in 2019. **This is particularly evident in the 21-25 year-old age bracket** (26% versus 16% on average). In contrast, it is the older, affluent travelers in Hong Kong (aged 36 years and above) who tend to be loyal to a hotel brand.

Also notable is the **increase in travelers whose destination choice is solely based on the location of a specific hotel or resort**. Up from 3% in 2019, 8% of travelers now make decisions in this manner. This is more evident among those from Tier-1 and Tier-3 cities (a 5% and 6% increase, respectively, versus 2019).

Hotels' increasing influence in choices of destination



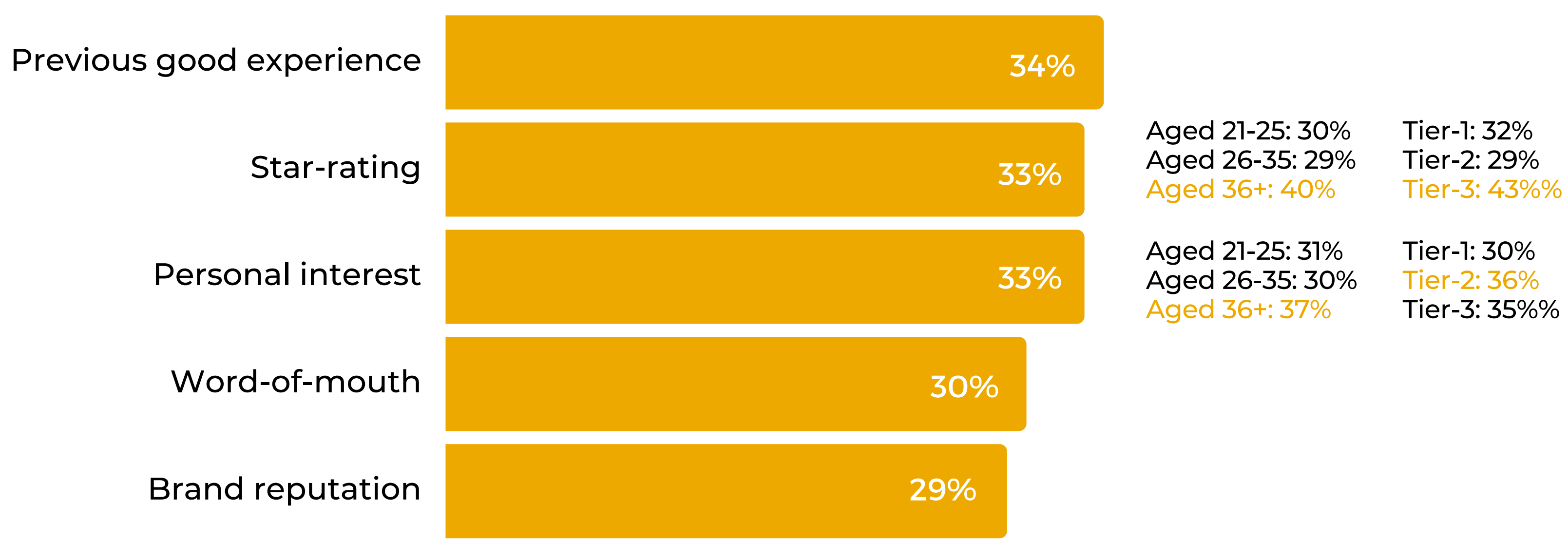
Personal feedback and word-of-mouth sway booking decisions.

Unlike price and budget-sensitive Hong Kong travelers, where 41% of respondents choose hotels based on budget, **Chinese travelers place more emphasis on past experience, star-rating or reviews, and word-of-mouth**.

Hence, positive guest experience alone carries great potential for repeat and new business. Interestingly, for affluent Chinese travelers, budget and promotional offers are among the least important factors in choosing a hotel.

Star-rating and personal interest are especially important to those **over 36 years old** and those from **Tier-3 cities**.

Factors impacting hotel selection



Convenience, service and food choice matter.

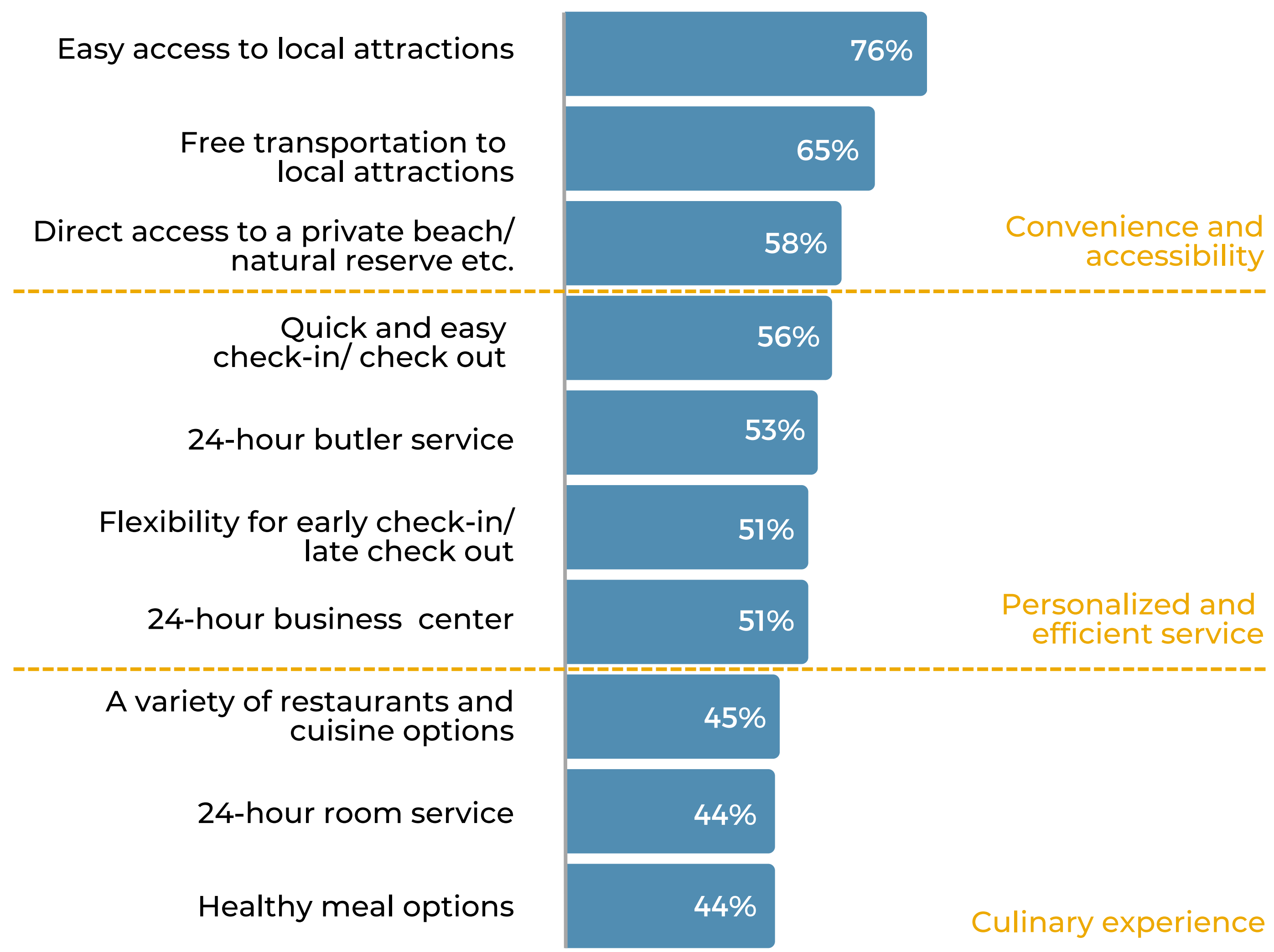
From a list of 49 items or criteria, respondents chose hotel services and amenities that were most important to them. The choices included location, rooms, service, facilities, dining and kids' club. The factors deemed most important by affluent Chinese travelers emphasize the importance of convenience and accessibility, personalized and efficient service, and culinary experience.

Convenience is the top factor that drives accommodation selection. For city hotels, it is about easy access to attractions, entertainment, and shopping, while resort guests look for proximity to the beach and other activities. Free shuttle service to attractions is a strong influencing factor in hotel choices.

Round-the-clock butler, room service and business center are also important as these give assurance that their needs can be attended to at any given time.

Culinary options are also important for wealthy Chinese travelers as they tend to have meals in the hotel before and after they come back from sightseeing or shopping.

10 most important hotel services and amenities

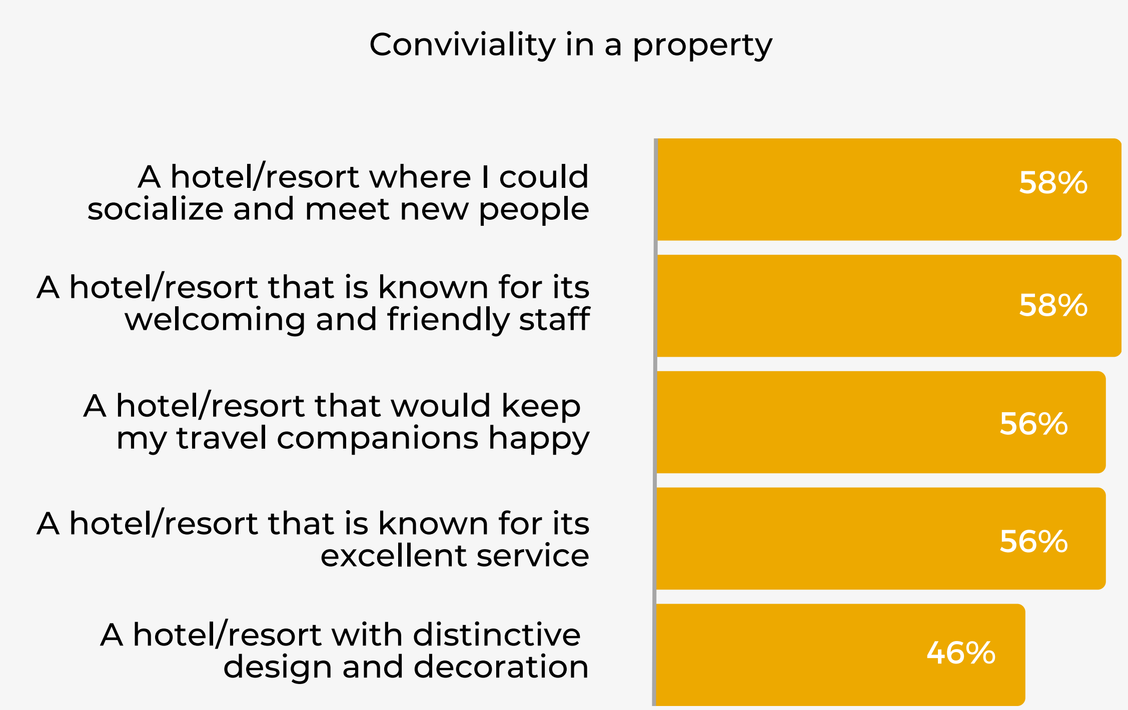


Growing preference in properties where there is a sense of conviviality, impeccable hospitality, and aesthetics.

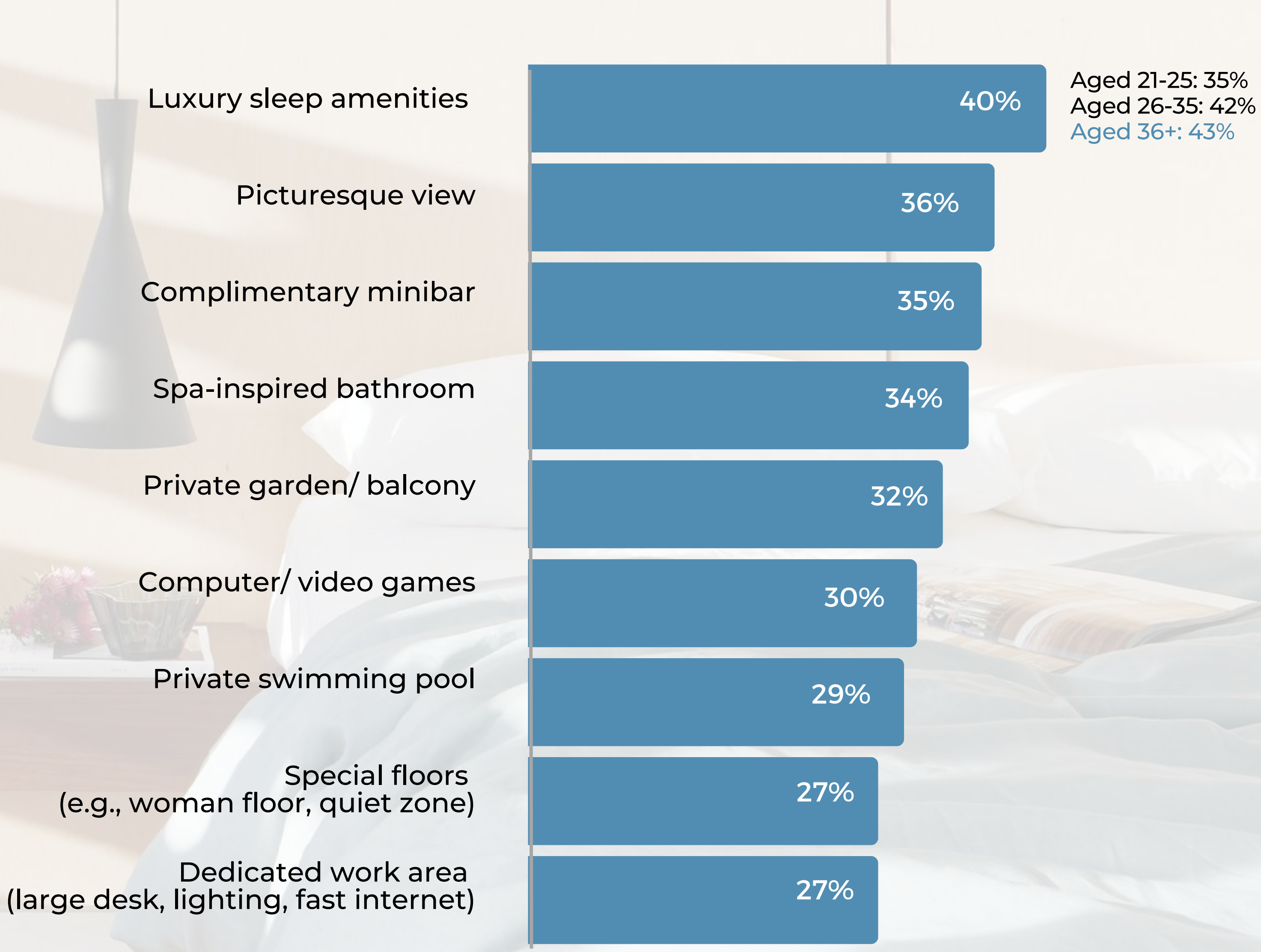
Consumers are shifting their preference towards community-minded and design-centric hotel properties. This is a trend that has been gaining momentum in the boutique hotel segment.

While 85% of affluent Chinese travel with companions, **majority of respondents want to stay in hotels and resorts where they can have an opportunity to socialize and meet new people**. This friendly and welcoming atmosphere is an aspect that travelers want in the staff.

As Chinese travelers become increasingly discerning, hotel design will become a feast for the senses and a defining factor of luxury.



Most important attributes of hotel rooms/ suites



Creature comforts and relaxation are vital in a hotel room.

Be it customized pillow choices or luxurious beddings, sleep amenities are most important, especially among the 36+ age group. This is consistent with the prevalence of poor sleep quality among the population.

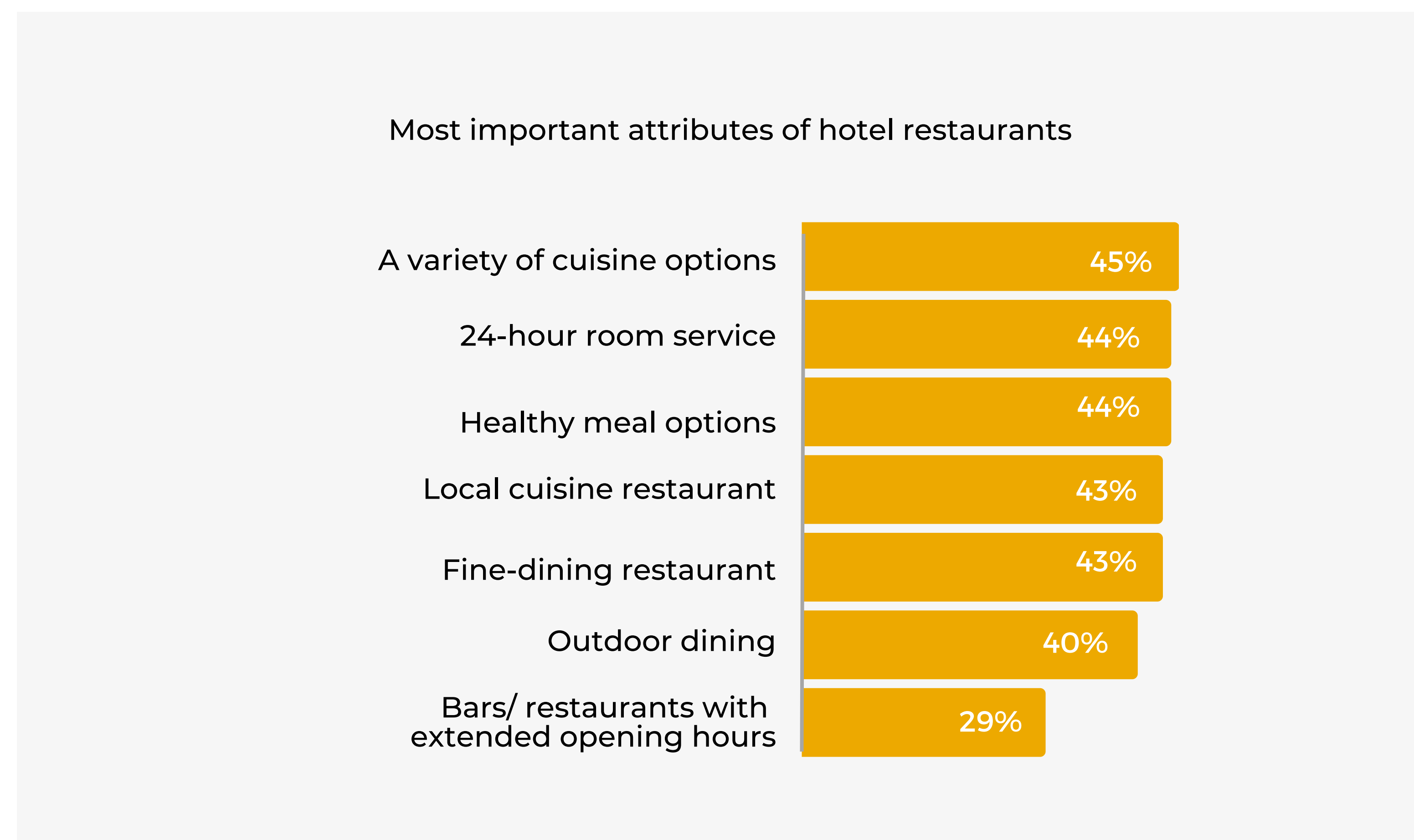
Across the board, the affluent Chinese travelers prefer rooms with a view — whether it be the natural scenery or a garden. Complimentary mini-bar amenities and a bathroom with spa features are also important attributes.

Dining options matter.

Wealthy Chinese travelers tend to eat meals in the hotel before they head out for sightseeing, shopping, or other activities. Most also eat supper in the hotel after a whole day out. Hence, **variety of cuisine and even flavours from home are listed as important preferences.**

Respondents are split among what is important for them as far as hotel culinary options are concerned. Aside from variety of menu offerings, healthy meal options, 24-hour room service, and a bespoke, fine dining experience are also important to affluent Chinese travelers.

Interestingly, bars with extended opening hours do not matter as much, with only 29% of respondents saying this was an important attribute.



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From Planning to Booking

Practical information and insiders' insights and tips shape travel decisions. Video content and imagery strongly influence consumer choices. While most book directly on brands' official websites, travel agents play an increasingly crucial role in planning and booking.

Planning

83%
plan well in advance

Decisions are mostly made
alone

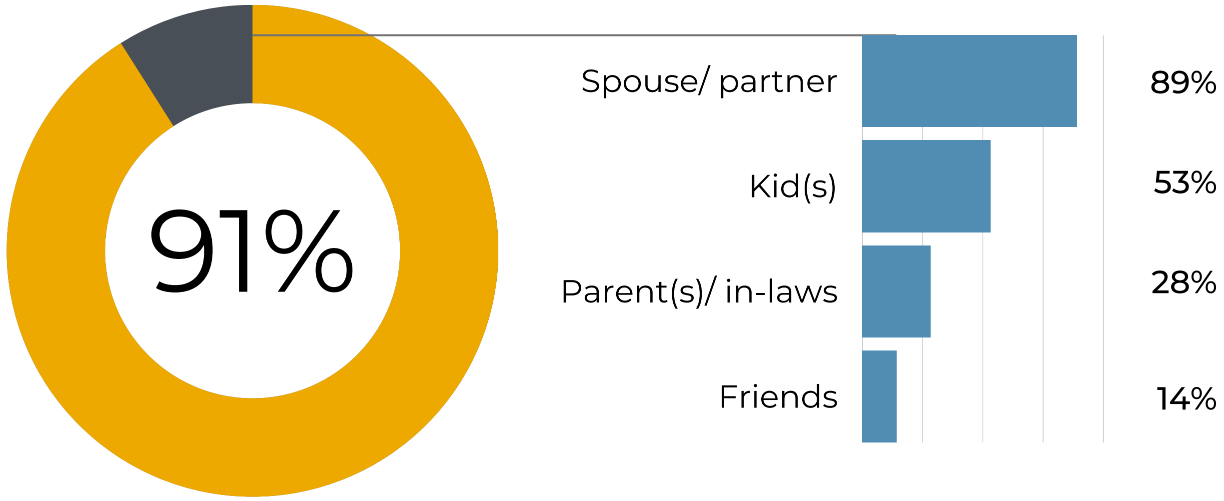
77%
decide on the destination first, then hotel

26%
Gen Z more likely to decide on the hotel/ resort first, before the destination

Single decision maker for the traveling group.

91% of affluent Chinese make leisure travel decisions on their own. But 86% of them plan to travel with at least one companion, mostly with their spouse/ partner (66%).

In cases where there are joint decisions, these are made together with the spouse/ partner (89%) or children (53%).



Make leisure travel decisions alone

Information Gathering

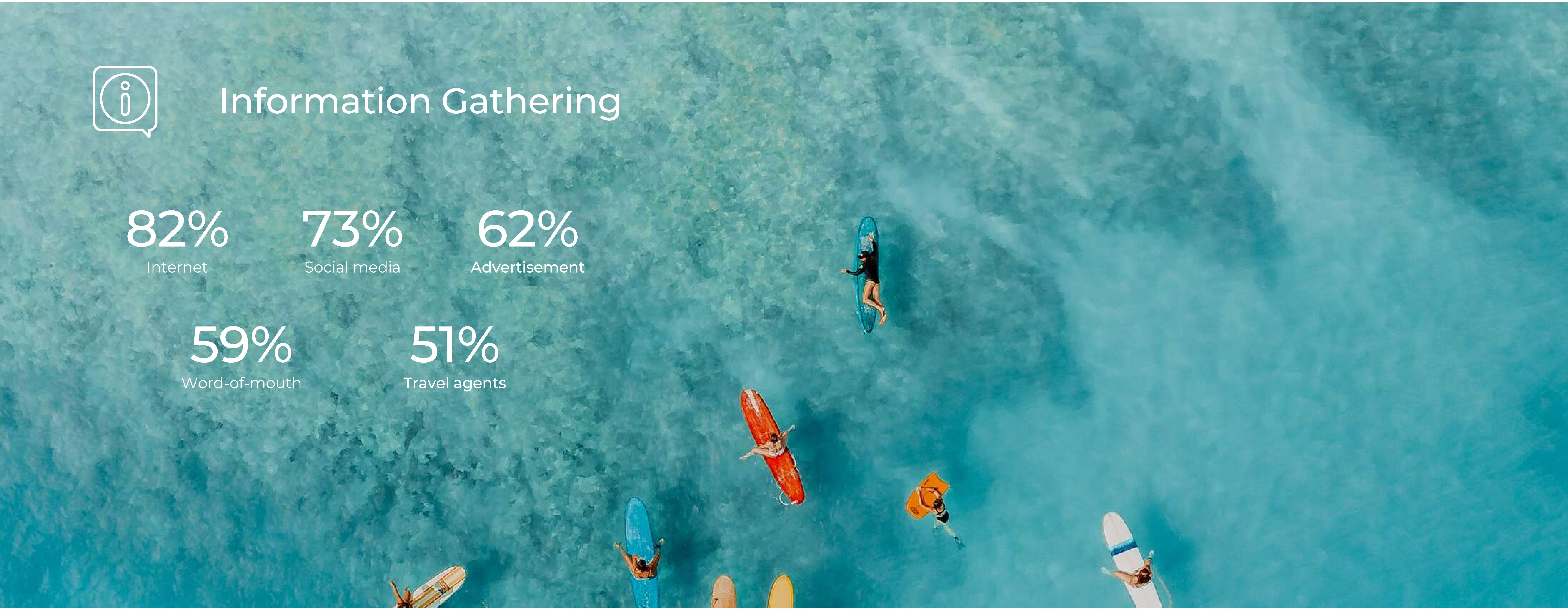
82%
Internet

73%
Social media

62%
Advertisement

59%
Word-of-mouth

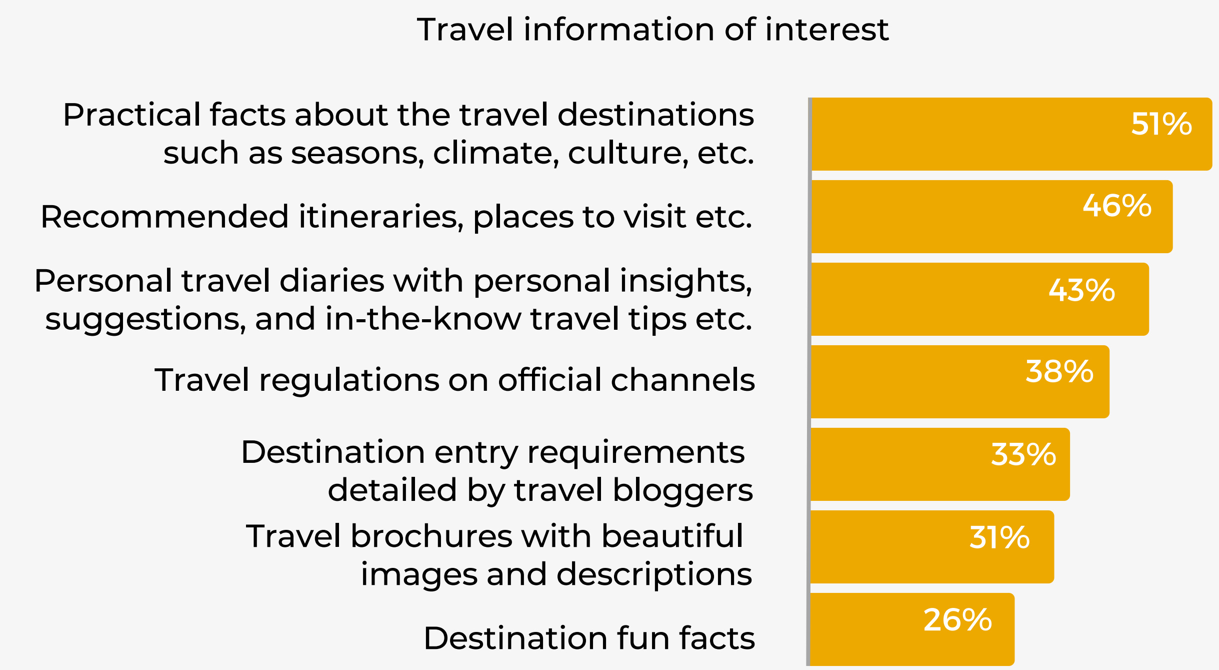
51%
Travel agents

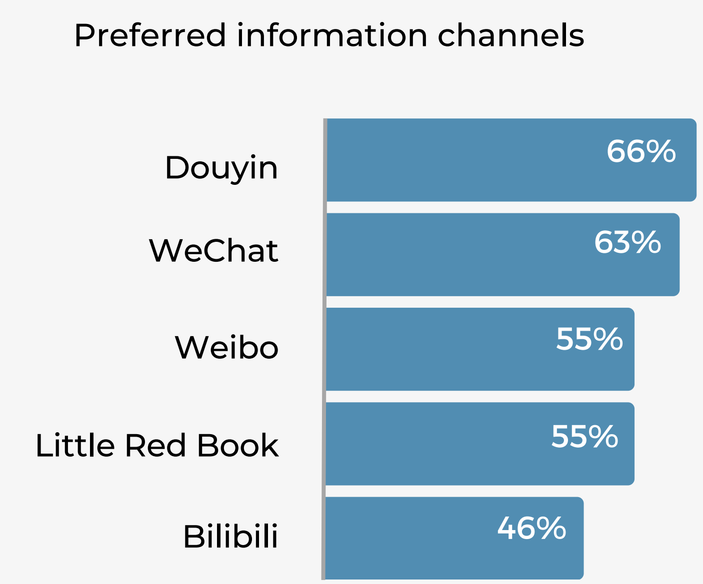


Travel decisions based on research from official sources and personal feedback.

Travel decisions are guided by research. Typically, affluent Chinese travelers do research from official sources, features from travel bloggers, writers or influencers on recommended itineraries, tips and insights. Images from go-to, credible sources also play a role in drumming-up interest in a destination or attraction.

As "reviews" play an important role in Chinese consumerism, personal travel blogs are indeed an important source of information. Meanwhile, video-based platform Douyin has surpassed WeChat and Red as the most popular information channels, once again highlighting the growing popularity of using videos to promote travel products.



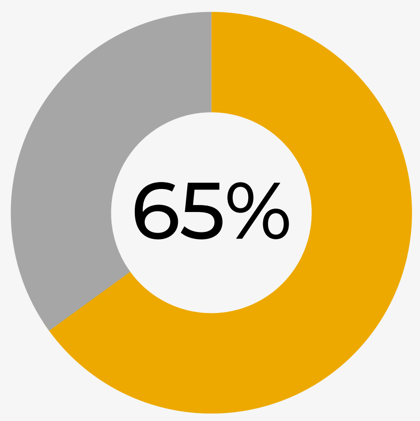


Booking

76%	47%	21%
Book within 3 weeks	Book within 1-2 weeks	Gen Z book less than 1 week

The top 3 online booking platforms for international travel

Trip.com	89%
途牛 tuniu.com	57%
Booking.com	32%



Book directly on brands' website

Offline channels are still crucial, albeit less than online channels
Travel agents (online & offline) are also key booking channels.

While, direct bookings are preferred, travel agents remain important in finalizing travel plans.

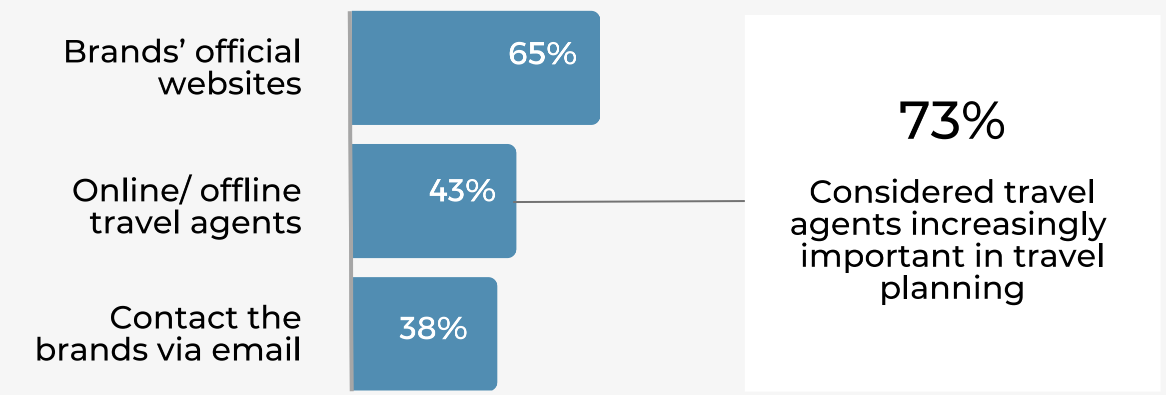
In contrast to domestic travel where online travel agents are considered the main one-stop-shop platforms for planning and booking, travelers tend to book directly through the websites of travel brands for international trips.

But both online and offline travel agents influence planning (73%) and booking (43%) – emphasizing the need for reliable agents who can help navigate nuances such as connectivity to get to destinations, travel requirements and other factors.

Noteworthily, **more than 70% of travelers still book offline**, indicating that offline channels are still crucial even in the digital-first market.

	Planning	Booking
Online	95%	82%
Offline	86%	74%

Ways to make booking for international travel



Travel Essentials

With more plans to fly first class, COVID safety measures and service matter more than price. Travelers prefer loyalty programs that grant them personalized service and priority access.

First class = safer seats.

More affluent Chinese said they prefer flying first class, with a marked increase versus 2019. This increase is particularly evident among the 36+ age segment and those in Tier-3 cities.

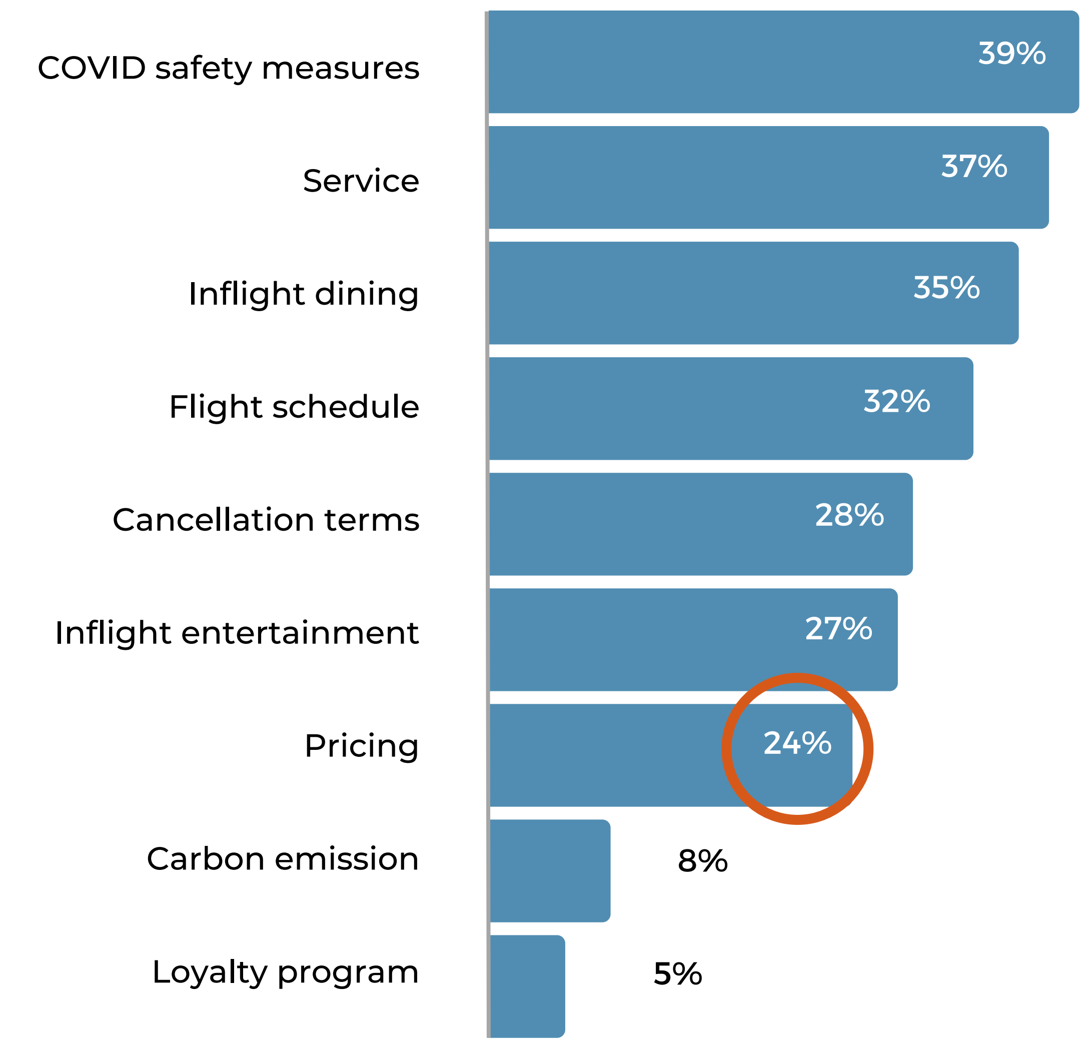
Only 22% of affluent Chinese said they would fly economy class.

	2019	2023	Difference	
First class	31%	38%	+7%	Aged 21-25: 39% Aged 26-35: 33% Aged 36+: 43% Tier-1: 39% Tier-2: 34% Tier-3: 43%
Business class	35%	34%	-1%	
Premium economy class	39%	35%	-4%	
Economy class	24%	22%	-2%	

As a point of comparison, less Hong Kongers said they would fly first class, reflective of the cautious sentiment towards economic prospects and relative maturity as international travelers. 44% of Hong Kongers said they would fly economy.

Affluent Chinese travelers are not price-sensitive.

Factors impacting choice of airlines



Travel by train remains steady. As road trips have become popular, demand for car rental is expected to rise.

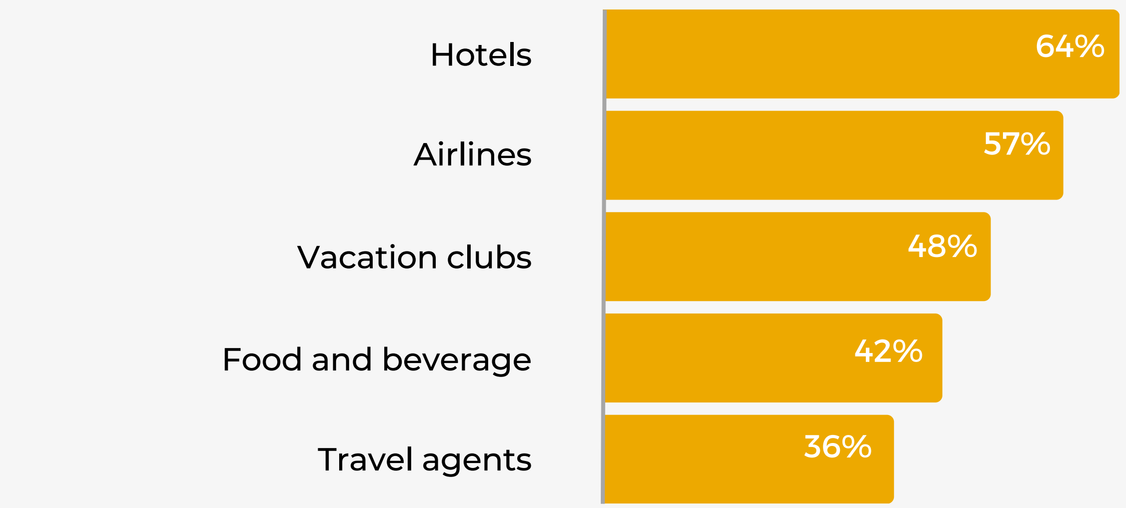
Meanwhile, cruise ships remain a steady preference in leisure travel.

15%	12%	14%
Train	Cruise Ships	Rental Car
-1%	+1%	+4%

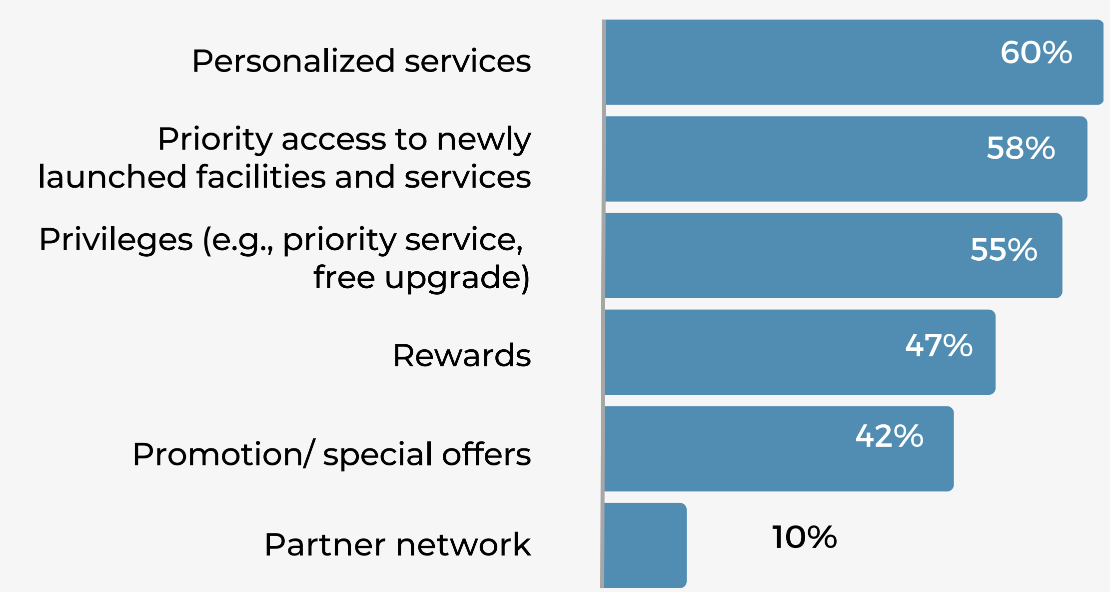
Loyalty memberships are a badge of honor.

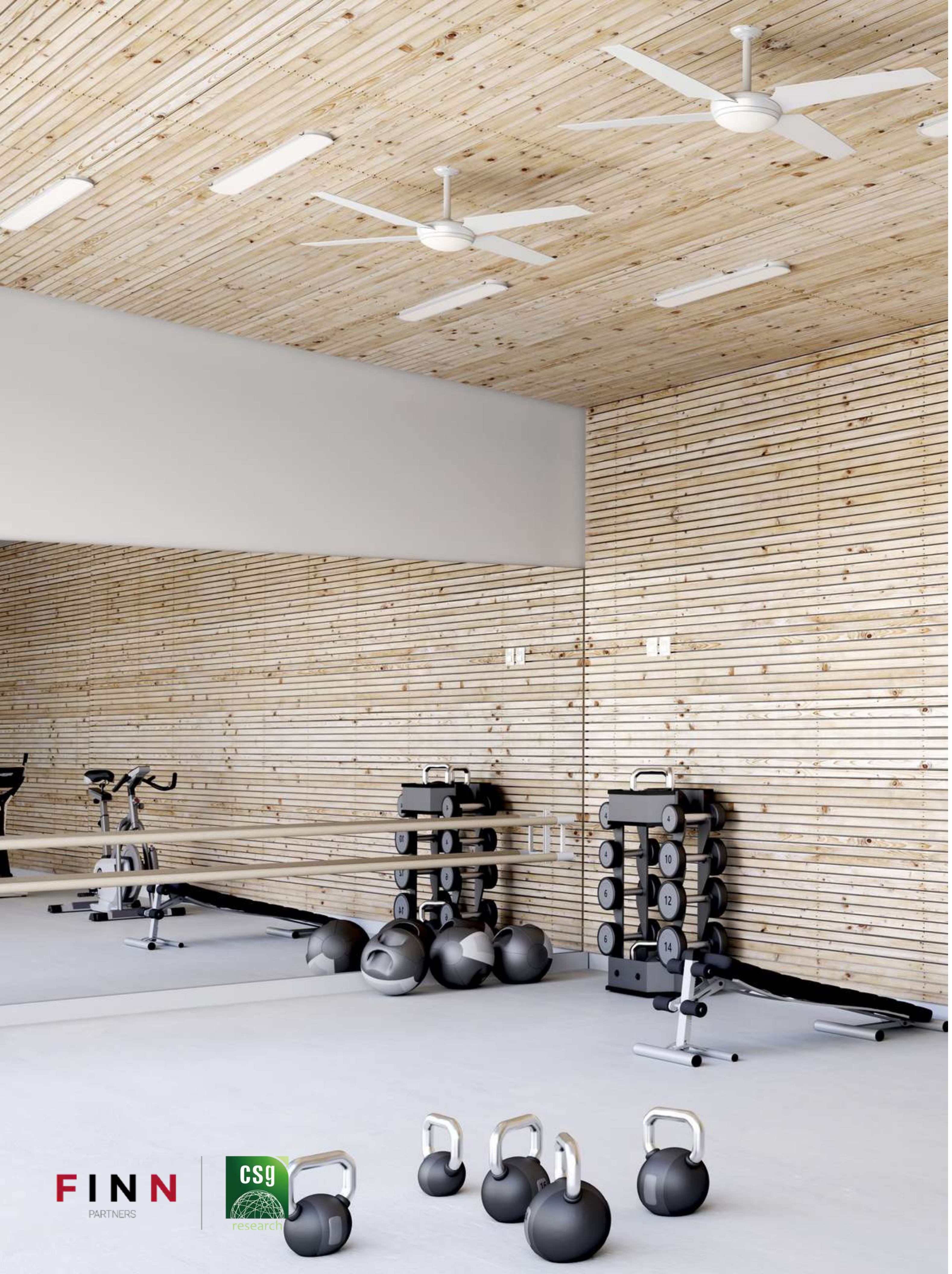
The motivation behind loyalty memberships is the exclusive privileges - personalized service, priority access and VIP amenities. Travelers are less keen on rewards and special discounts.

Loyalty program ownership

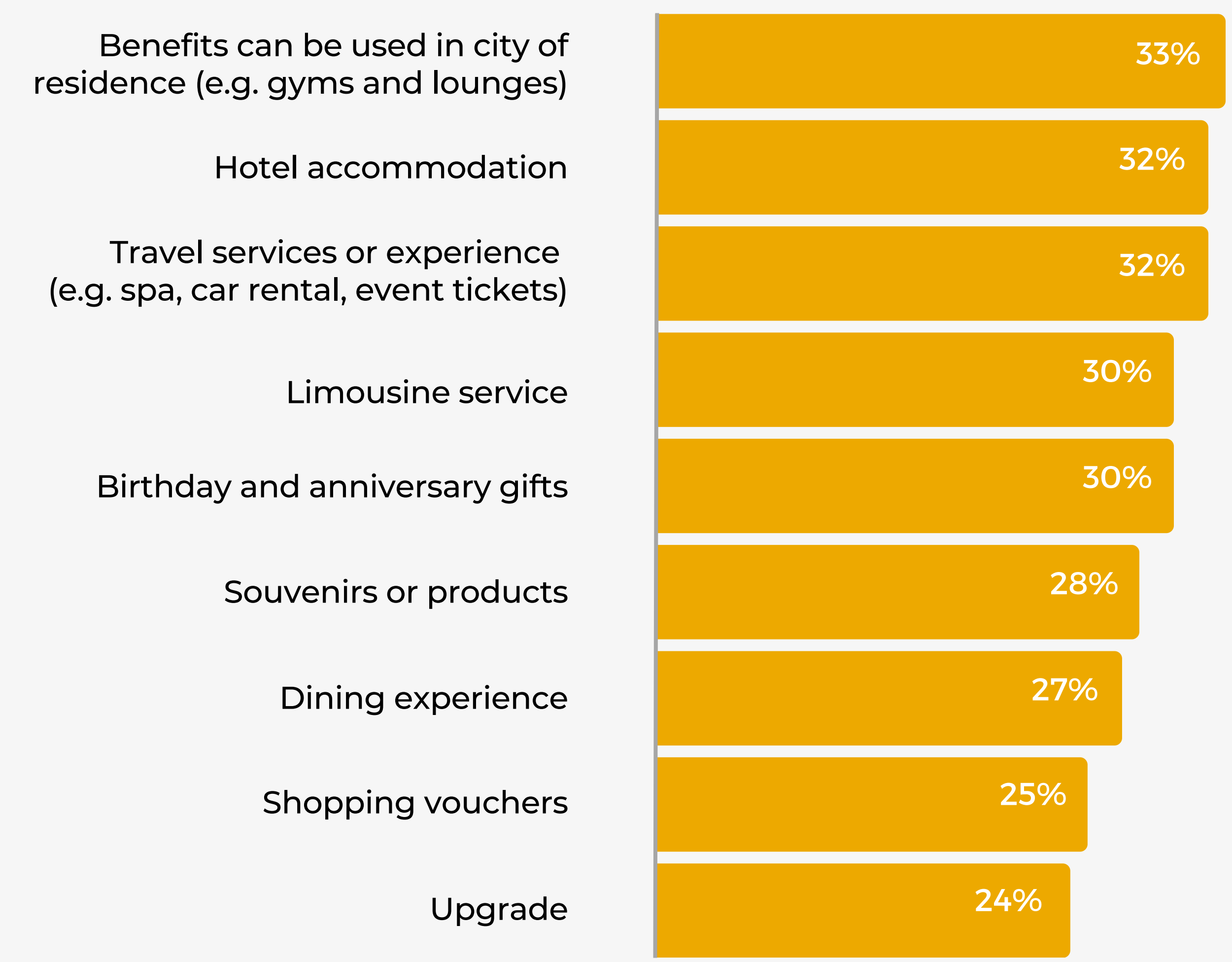


Motivation to sign up





Most attractive membership benefits and rewards



About Finn Partners

Founded in 2011 on the core principles of innovation and collaborative partnership, FINN Partners has grown to almost USD 200 million in fees during the past 10 years, becoming one of the fastest-growing independent agencies in the world. The full-service marketing and communications company's record-setting pace results from organic growth and integrating new companies and new people into the FINN world through a common philosophy.

With more than 1,400 professionals across 33 offices, FINN provides clients with global access and capabilities in the Americas, EMEA and Asia. In addition, FINN provides its clients with access to top-tier agencies worldwide through its membership in the global network PROI.

Headquartered in New York, FINN has offices in Atlanta, Bangalore, Beijing, Boston, Chicago, Delhi, Denver, Detroit, Dublin, Fort Lauderdale, Frankfurt, Guam, Hong Kong, Honolulu, Jerusalem, Kuala Lumpur, London, Los Angeles, Manila, Mumbai, Munich, Nashville, Orange County, Paris, Portland, San Diego, San Francisco, Seattle, Shanghai, Singapore, Vancouver and Washington D.C.

Finn Partners' Global Travel Practice works with boutique hotels, tour operators, luxury hotel brands, in-demand destinations, cruise lines, airlines, and other travel products on a breadth of communications services, including consumer and trade media relations, media intelligence, trendspotting, content development and storytelling, brand partnerships, social media strategy and advertising, influencer marketing, content marketing, digital marketing, experiential and thought leadership. The China travel practice is located in Shanghai, Beijing and Hong Kong.

Find us at finnpartners.com and follow us on LinkedIn, Twitter and Instagram at @finnpartners.

About Consumer Search Group (CSG)

CSG is a leading marketing research firm established in Hong Kong in 1982 offering comprehensive research services to clients in diverse industries. It is also a marketing research pioneer in Greater China. The company has further expanded from providing regional to global marketing research services through connection with GIA (Gallup International Association) and WIN (World Independent Network of Market Research) networks.

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