



# 世界旅游联盟 中国入境旅游数据分析报告

WTA DATA ANALYSIS REPORT OF  
CHINA'S INBOUND TOURISM

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# 2019

中国·杭州 Hangzhou·China  
2019年9月 September, 2019

# FOREWORD

Tourism and culture are closely interconnected, as tourism is a major manifestation of cultural exchange while culture serves as a defining factor for tourism. In recent years, inbound tourism, outbound tourism and domestic tourism have been going hand-in-hand, becoming the three major drivers of tourism market.

In an era featuring the integration of culture and tourism, a series of events bring great opportunities to this industry, including the implementation of the Belt and Road Initiative, favorable policies for inbound tourism (e.g. relaxation of visa restrictions) as well as the improvement of both transportation networks and infrastructure for tourism. In 2015, China's inbound tourism thus started to rise after a three-year-long decline and in 2018, hitting a record high of the industry.

This report will take the overall data of China's inbound tourism in 2018 as the starting point. Based on the three stages of inbound tourism (i.e. before, during and after the trip), the report will comprehensively analyze the behaviors of inbound tourists, the future trends of this sector and the development potential of inbound tourism. The report will also provide suggestions regarding policy making, supplementary measures, product upgrading, and marketing innovation.

In view of the relatively limited source of data, there are still some imperfections in this report, so we sincerely look forward to your comments and advice.



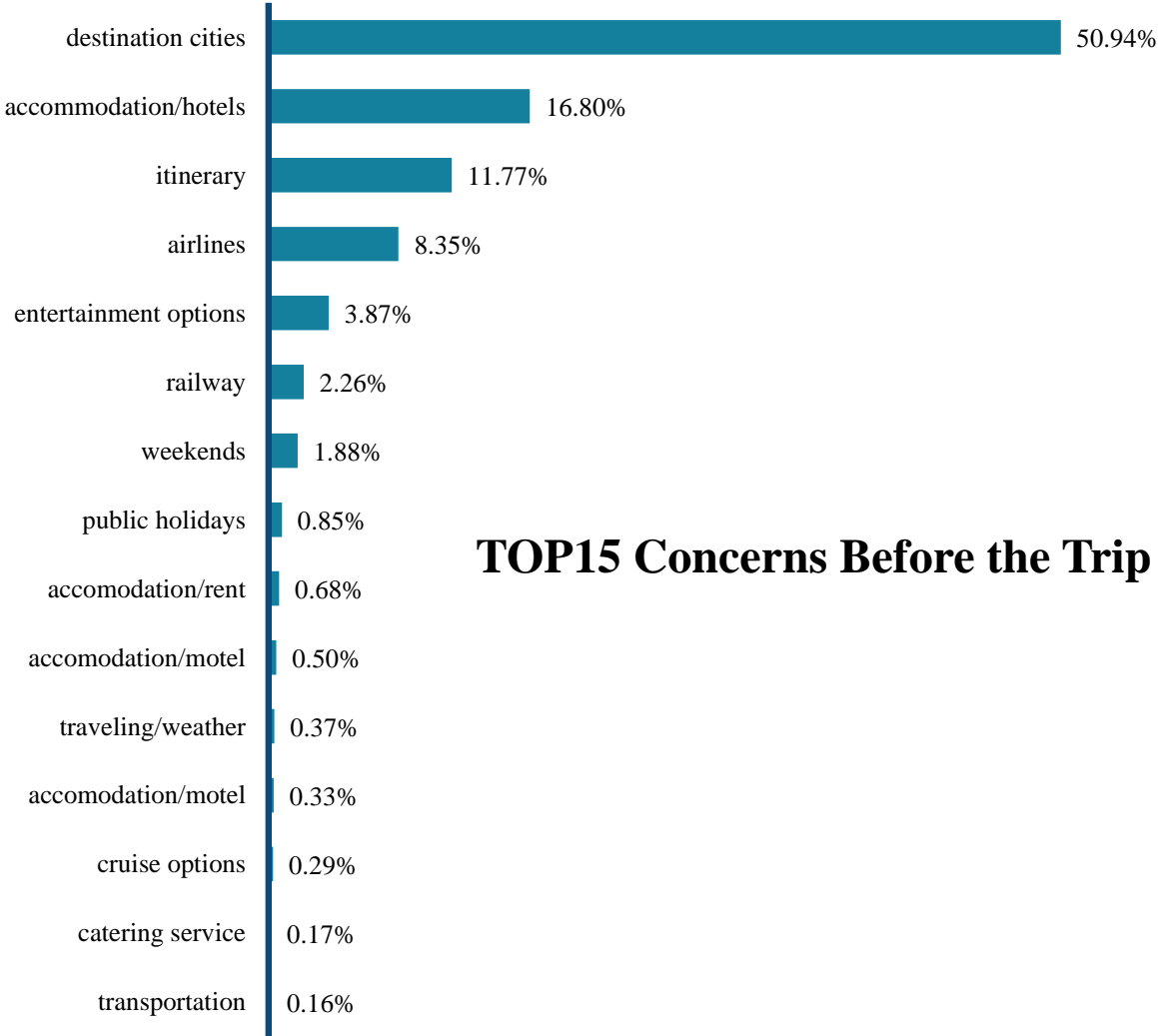
## Behavioral Analysis on Inbound Tourists to China

1. Tourists' Top Concerns
2. Rising Stars on the Most-Searches Cities List
3. Ways to Come and Time of Stay
4. Who Stay Longer?
5. Who Are China's Competitors?

## 1.1 Tourists' Top Concerns

### TOP2: Destination Cities and Hotels

- Visitors pay most attention to destination cities and hotels before they travel.
- Through the search behavior of inbound tourists, it is found that the most concerned issues by tourists are the destination cities (50.94%), followed by hotels (16.80%), public transportation (11.77%), airlines (8.35%), special entertainment options (3.87%), etc.
- It can be seen that in the overseas marketing of tourism, the brand building of the overall destination is particularly important, and it is one of the core driving forces for tourists to choose where to go. At the same time, if the destination's promotional materials include the features of specific hotels, transport options, airlines and special events, we believe there will be more opportunities in this regard.



## 1.2 Rising Stars on the Most-Searched Cities List

### Shenzhen with the biggest rise in popularity, followed by Haikou, Zhangjiajie, Yiwu and Tianjin

Shenzhen	<ul style="list-style-type: none"> <li>In 2018, Shenzhen's image and reputation have been rapidly upgraded, which is inseparable from the initial formation of its all-in-one tourism promotion &amp; marketing system.</li> <li>Shenzhen has actively participated in regional tourism cooperation such as the Guangdong-Hong Kong-Macau Bay Area Tourism Federation, the Guangzhou-Shenzhen Pearl Tourism Alliance, and the Shenzhen-Dongguan-Huizhou Shan River Tourism Alliance.</li> <li>The city has organized tourism companies to conduct joint promotion activities at home &amp; abroad, and participated in many large-scale international tourism exhibitions on the Chinese Mainland, Hong Kong SAR, Macau SAR, and Taiwan.</li> <li>Shenzhen has also organized aviation and cruise companies to carry out more than 100 urban tourism brand promotion activities under the theme of <i>Starting from Shenzhen and Seeing the World</i></li> </ul>
Haikou	<ul style="list-style-type: none"> <li>In 2018, Hainan Province held more than 100 festivals and cultural performances, and successfully held cultural festivals, leisure fairs, food exhibitions, drama weeks and other cultural events, especially the 9<sup>th</sup> Hainan Island International Sailing Ship Competition and the 13<sup>th</sup> Hainan Island International Road Cycling Tournament.</li> <li>In 2018, Hainan optimized the policies for inbound tourism and offered the visa-free policy for people from 59 countries. By 2018, there have been 74 direct flights with international routes which connect the Chinese Mainland, Hong Kong SAR, Macao SAR and Taiwan, the Russian-speaking countries, Southeast Asia, Europe, the United States, Australia and New Zealand and other key areas as sources of inbound tourists. A total of 42 batches of "Going Out" as well as another 20 batches of "Coming In" events were organized throughout the year.</li> </ul>

1.2 Rising Stars on the Most-Searched Cities List

Shenzhen with the biggest rise in popularity, followed by Haikou, Zhangjiajie, Yiwu and Tianjin

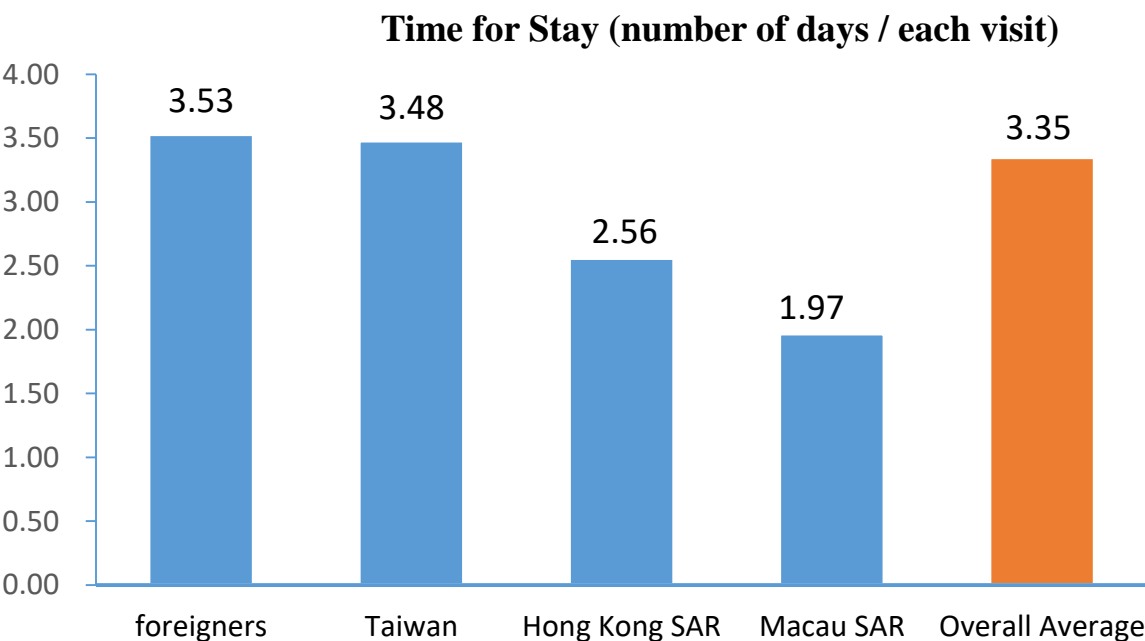
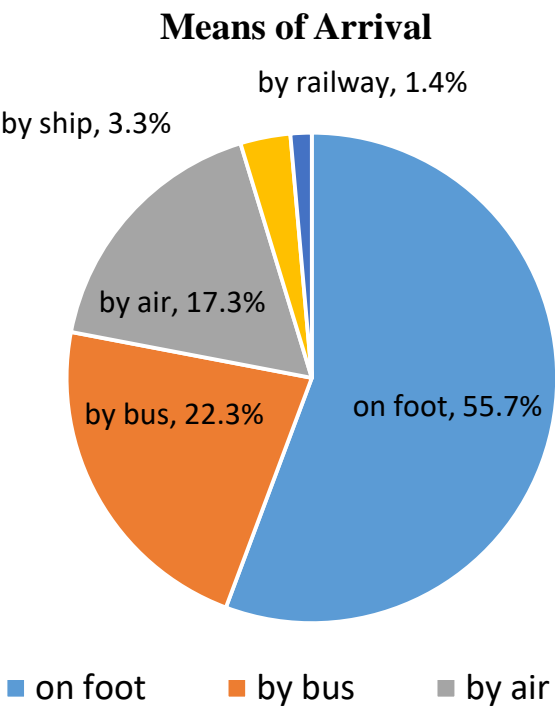
Zhangjiajie	<p>In 2018, Zhangjiajie held magnificent and varies of international festivals. At the same time, it continued to carry out a series of marketing activities at home and abroad.</p> <p>The promoting teams have gone to Chongqing, Chengdu, Guangzhou, Shanghai, Germany, Austria, Russia, Thailand, Malaysia, Singapore to welcome the guests from afar.</p> <p>The deep integration of culture and tourism enriches the tourism connotation of Zhangjiajie and improves the reputation of the city.</p> <p>Featured events include:</p> <ul style="list-style-type: none"><li>• The 7th Winged Flight World Championships held in Tianmenshan</li><li>• The 2018 Huanglong Music Season</li><li>• The 2nd International Tourism Poetry Festival</li></ul> <p>Zhangjiajie also Implements the strategy of “standardizing quality and strengthening tourism” to accelerate the pace of internationalization of tourism in Zhangjiajie.</p> <p>The city Successfully held the 2018 Silk Road Business Leader (Zhangjiajie) Summit and the 12<sup>th</sup> Plenary Meeting of the Northeast Asian Regional Government Federation.</p>
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1.3 Ways to Come and Time for Stay

Inbound Tourists Coming Mostly on Foot with An Average Stay of 3.35 Days

- When categorized by means of arrival, inbound tourists come onto the Chinese Mainland on foot (55.7%), by bus(22.3), by air (17.3%), by ship (3.3%) and by railway (1.4%). These numbers include cross-border moves by neighboring country villagers as well as visitors from Hong Kong SAR and Macau SAR..
- In 2018, inbound tourists stay in China for 3.35 days on average. Visitors from Taiwan and foreign countries stay longer than average while tourists from Hong Kong and Macau stay for shorter each time due to proximity to the Chinese Mainland.



Source: Ministry of Culture and Tourism (left); ChinaUnicom Telecommunication Signaling (right)

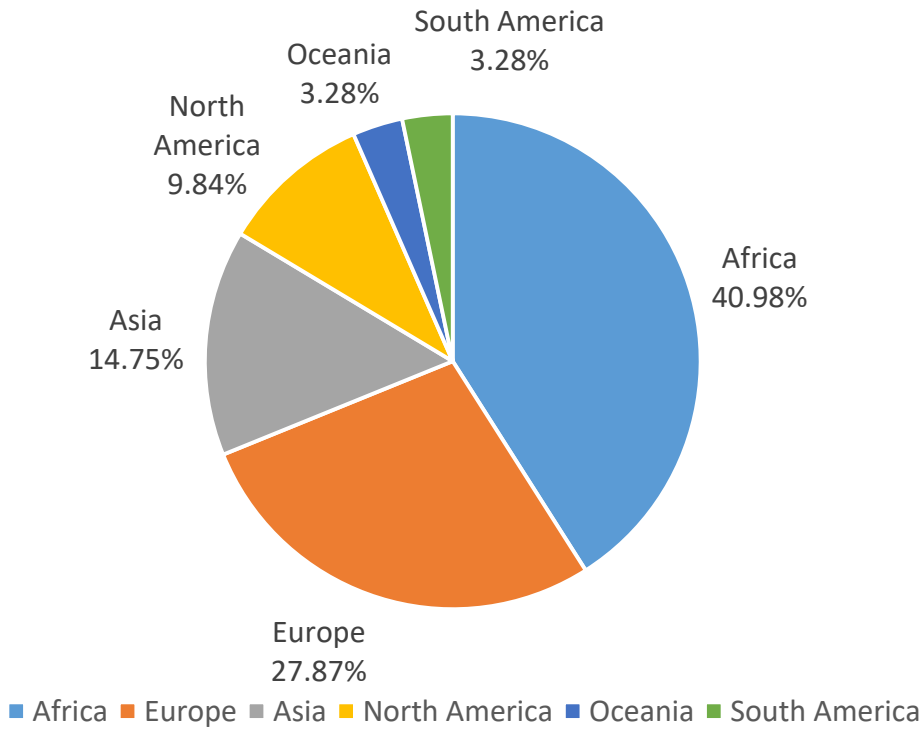


1.4 Who Stay Longer?

African Visitors Taking the Lion Share, followed by European Tourists

- By analyzing the source data of Chinese inbound tourists with a single stay of more than 4 days, it is found that African tourists account for the largest proportion, followed by European tourists.
- It can be seen that in the long-term, we can focus on Africa and Europe when doing targeted marketing campaigns.

Length of a Single Stay (Categorized by Continents)



Inbound Tourists Staying for More Than 4 Days in 2018 (Categorized by Countries, TOP20)

No.	Country	Days of Stay	No.	Country	Days of Stay
1	Sweden	8.81	11	Republic of Ireland	5.90
2	Kenya	8.00	12	Bosnia and Herzegovina	5.87
3	Guinea-Bissau	7.30	13	Saint Kitts and Nevis	5.71
4	Zambia	7.23	14	Chad	5.66
5	Guinea	7.20	15	Portugal	5.63
6	Republic of Mali	6.90	16	Sudan	5.56
7	The Netherlands	6.73	17	Burkina Faso	5.50
8	Zimbabwe	6.27	18	Trinidad and Tobago	5.44
9	Algeria	5.97	19	Republic of Serbia	5.38
10	Benin	5.95	20	Democratic Republic of the Congo	5.32

Source: ChinaUnicom Telecommunication Signaling (right)

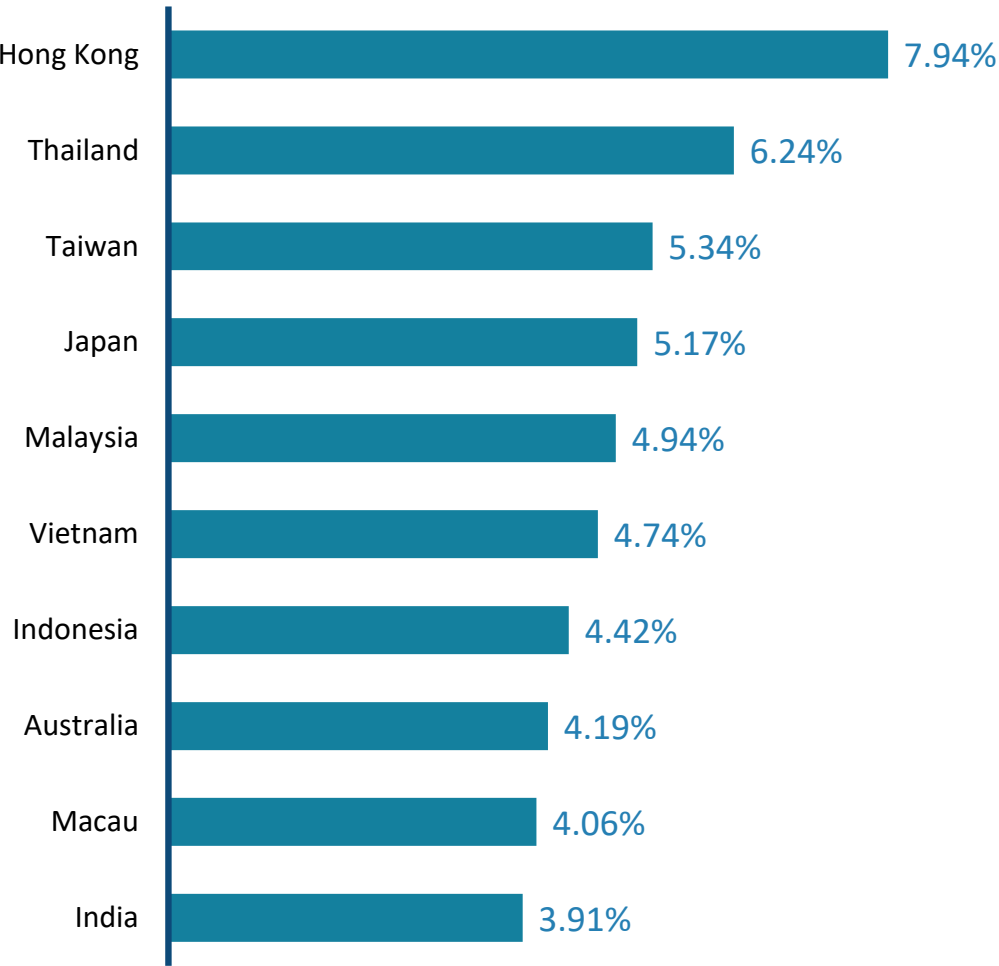


## 1.5 Who Are China's Competitors?

### Thailand and Japan

- Through the same period of the arrival of inbound tourists (+/- 3 days), in addition to the Hong Kong SAR, Macau SAR and Taiwan, visitors who searched for destinations on the Chinese Mainland also searched for other destinations such as Thailand (6.24%). Japan (5.17%), Malaysia (4.94%), Vietnam (4.74%), etc.
- It can be seen that China's inbound tourism should focus on excavating and creating the core attraction points with competitive differentiation. At the same time, in the long-distance line serial marketing promotion, we can also consider establishing a certain cooperative relationship with our competitors when necessary.

TOP10 Most-Searchd Places other than the Chinese Mainland



Source: Data from Online Travel Agent (OTA)  
Note: Being competitors means tourists search for multiple tourist destinations for the same trip (+/- 3 days)

# A Portrayal Analysis of Inbound Tourists to China

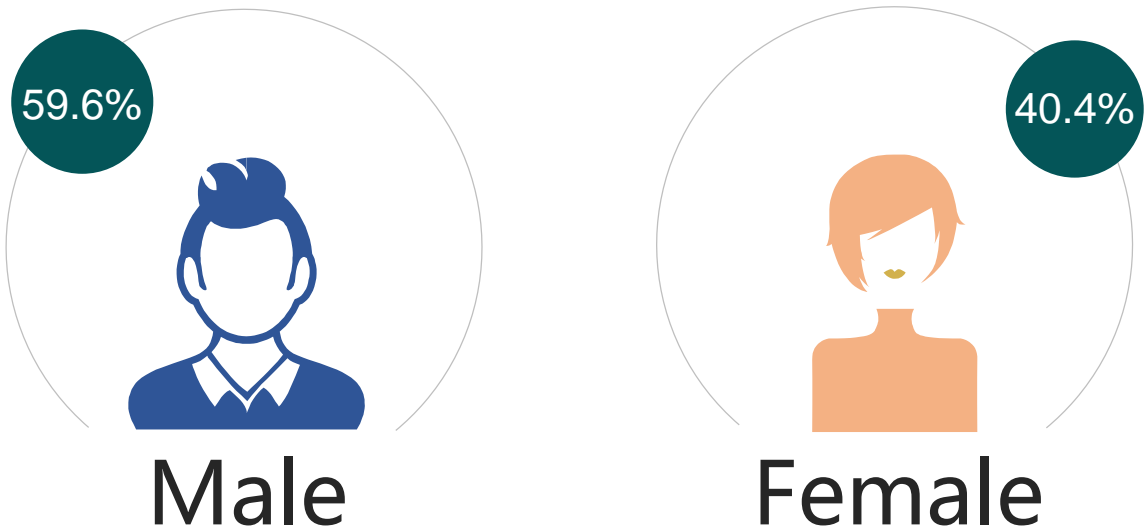
1. Who Are They?
2. Where Do They Come From, and Why?
3. Which Hotel Do They Prefer?
4. How Do They Travel?
5. What Do They Want to Do?

2.1 Who Are They?

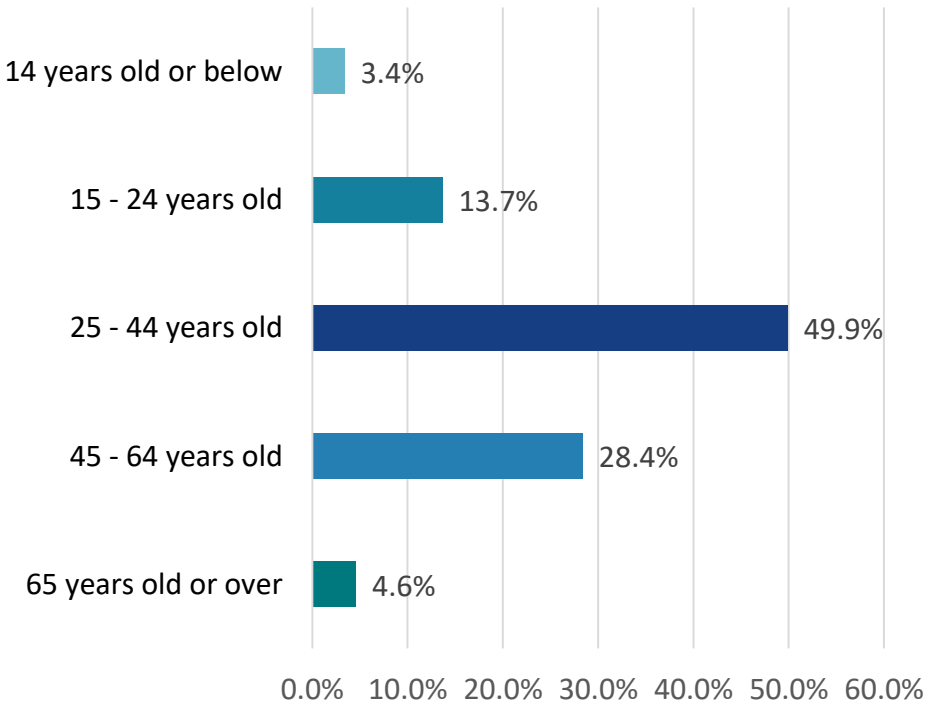
More Males and Half in 25-44 Years-Old Group

- According to the age structure, tourists aged 14 and below accounted for 3.4%, 15-24 years old accounted for 13.7%, 25-44 years old accounted for 49.9%, 45-64 years old accounted for 28.4%, and 65 years old and above accounted for 4.6%.
- By gender, males accounted for 59.6%, females accounted for 40.4%, and the male to female ratio was approximately 1.5:1.

Categorized by Gender



Categorized by Age

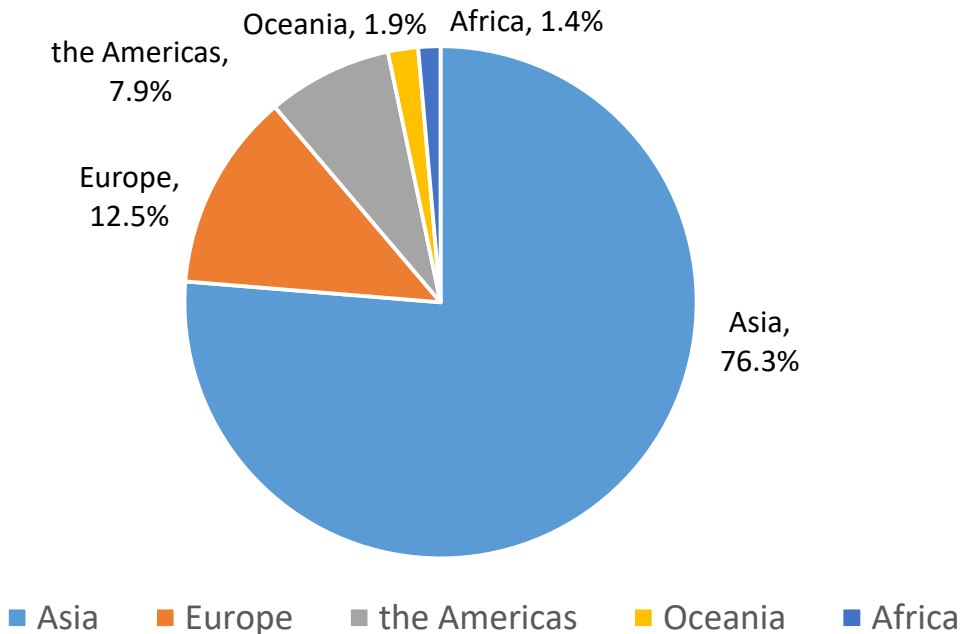


## 2.2 Where Do They Come From, and Why?

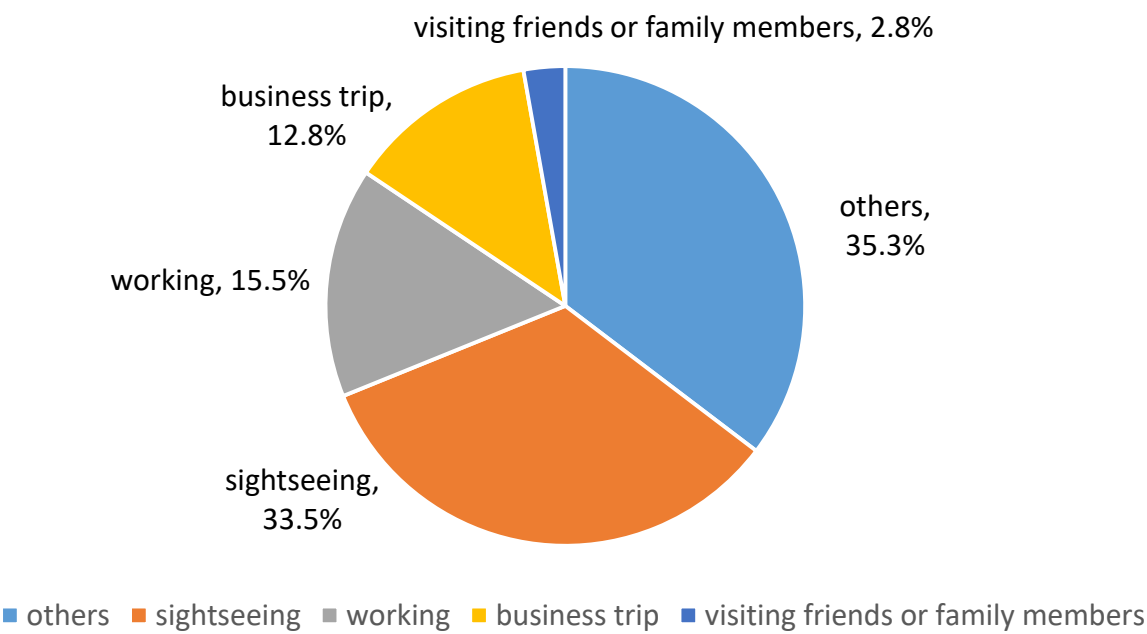
### Asian Tourists with the Most Visits, for Sightseeing

- In 2018, the number of foreign tourists entering the country was 47.95 million (including the number of foreign tourists who lived in China's neighbors on land), of which 76.3% were in Asia, 12.5% in Europe, 7.9% in the Americas, 1.9% in Oceania, and 1.4% in Africa.
- According to the purpose, tourism and leisure accounted for 33.5%, service accounted for 15.5%, conference business accounted for 12.8%, visiting relatives and friends accounted for 2.8%, others accounted for 35.3%.

Visits, Categorized by Continents



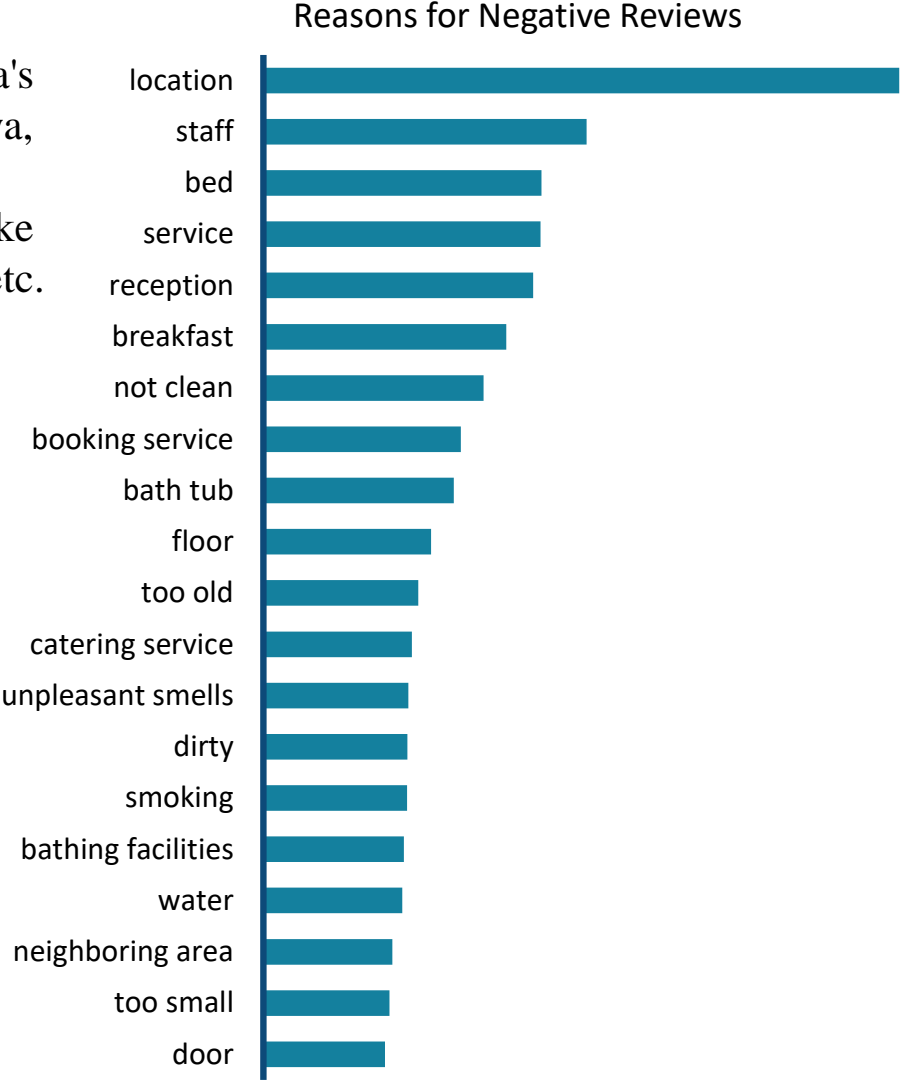
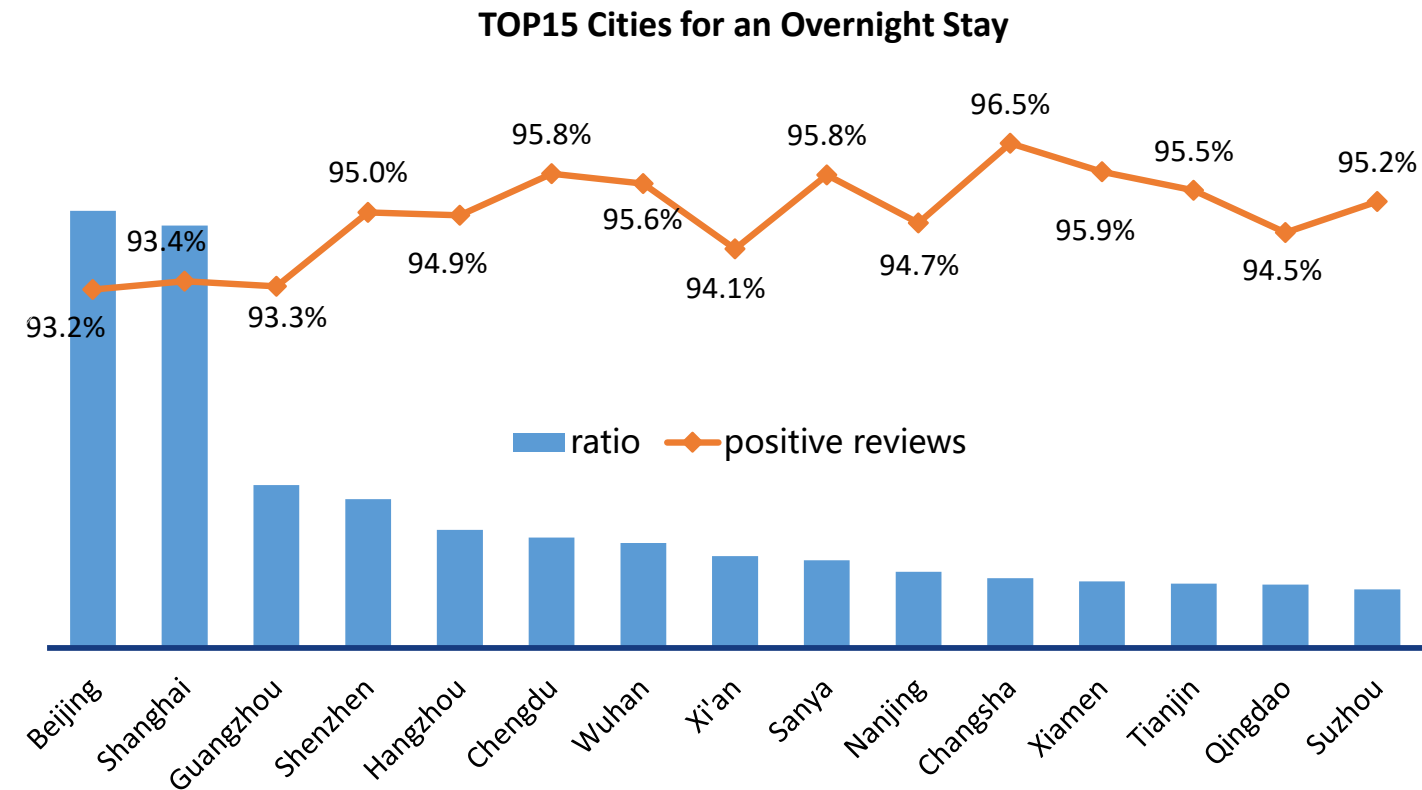
Visits, Categorized by Purpose



## 2.3 Which Hotel Do They Prefer?

### Where to Stay Overnight: Beijing, Shanghai and Guangzhou as TOP3

- The top three areas of overnight stay are Beijing, Shanghai, Guangzhou
- The city's favorable rate of overnight TOP15 is above 93%, of which Changsha's favorable rate is relatively high (96.5%), followed by Xiamen, Chengdu, Sanya, Wuhan and Tianjin.
- Tourists' negative reviews of accommodation are reflected in things like geographical location, hotel facilities, service attitude, environmental sanitation, etc.

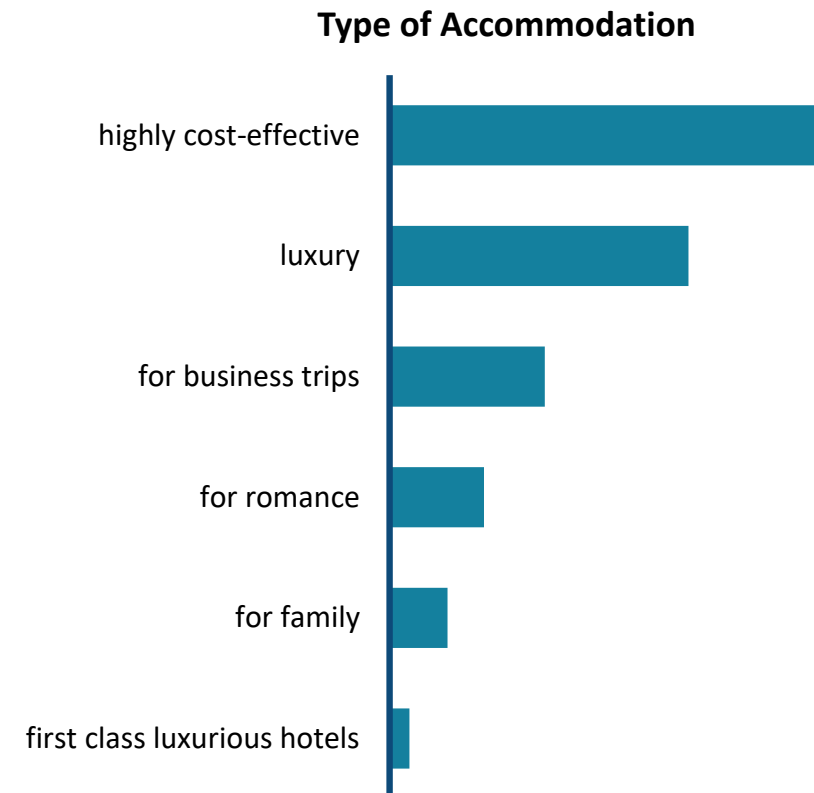
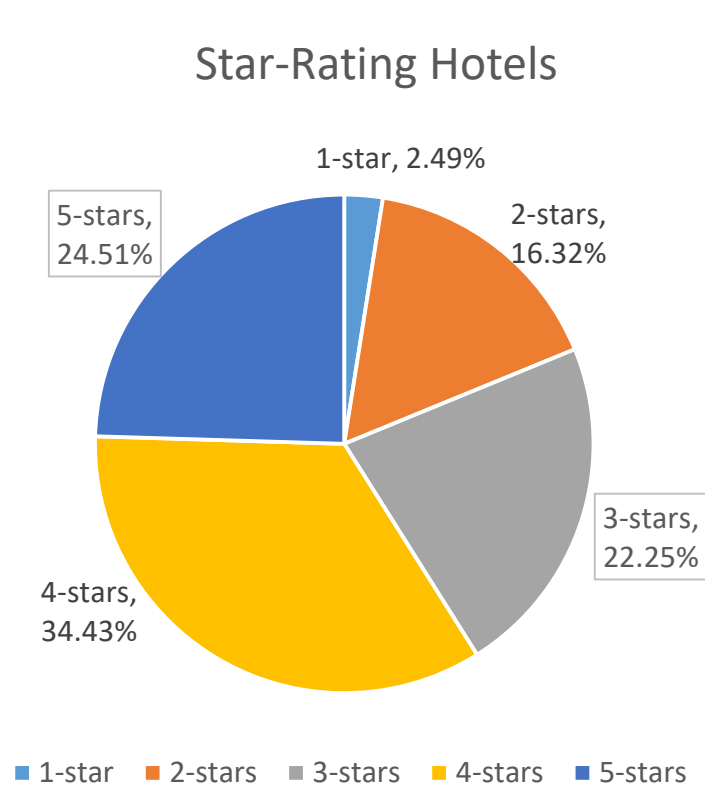


Source: Data from Online Travel Agent (OTA)

## 2.3 Which Hotel Do They Prefer?

### Four-Star Hotels as First Choice

- When inbound tourists choose to stay in a star-rating hotel, they mainly prefer 4 stars (34.43%) and 5 stars (24.51%).
- When choosing the type of accommodation, they mostly favor cost-effective hotels, followed by luxury hotels.
- It can be seen that when tourists travel, they tend to value the hotel's price/performance ratio.

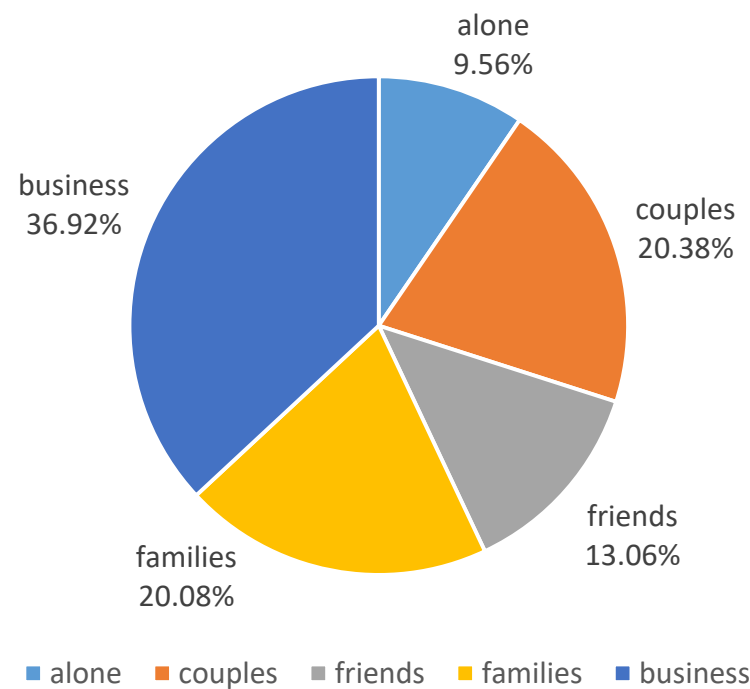


## 2.3 Which Hotel Do They Prefer?

### Staying Overnight: Families and Business Travelers

- Through analysis of overnight visitors, it was found that the largest number of business tourists, accounting for 36.92%; followed by travelers in family, accounting for 20.08%.
- Single-person travel, companionship with friends, business-oriented tourists are more inclined to choose cost-effective hotels while couples and families tend to choose more luxury hotels.

Types of Hotel Customers



Preference by Different Types of Travelers

	cost-effective	top resort hotel	luxury	for family	For romance	business
alone	27.7%	0.5%	27.4%	8.8%	14.4%	21.2%
couples	25.9%	1.4%	26.0%	11.6%	16.3%	18.9%
friends	28.5%	1.4%	28.0%	9.1%	13.6%	19.5%
families	26.1%	3.2%	26.4%	11.4%	14.7%	18.3%
business	27.3%	0.2%	26.9%	8.5%	15.0%	22.0%

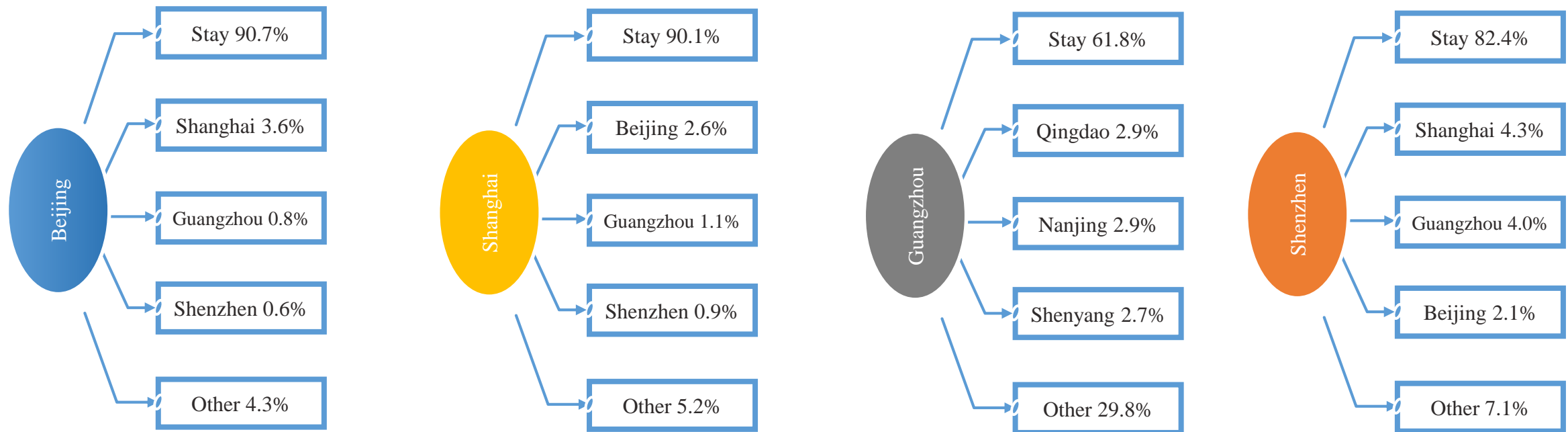


## 2.4 How Do They Travel?

### Concentrated Arrival, Determined by Resource Endowment, Location and Economic Likns

- An analysis of the four most popular cities among inbound tourists found that 90.7% of tourists destined for Beijing chose to stay overnight, and other tourists transited to Shanghai, Guangzhou, Shenzhen, etc.; 90.1% of tourists destined for Shanghai choose to stay overnight, other tourists transit to Beijing, Guangzhou, Shenzhen and other places; 61.8% of the tourists in Guangzhou choose to stay overnight, other tourists transit to Qingdao, Nanjing, Shenyang, etc.; 82.4% of visitors in Shenzhen choose to stay overnight, other tourists transfer to Shanghai, Guangzhou, Beijing and other places

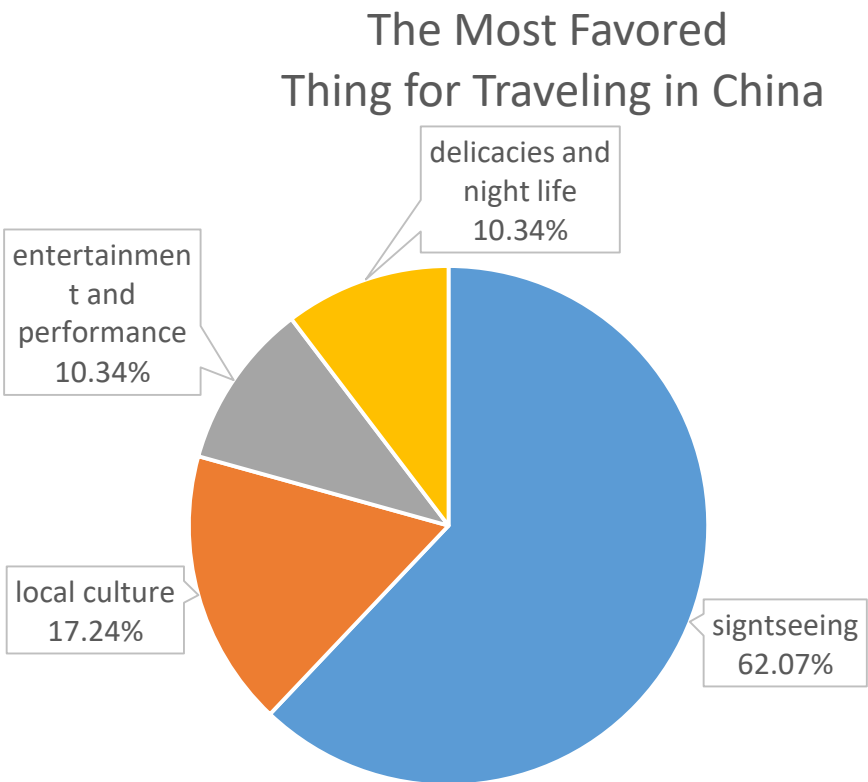
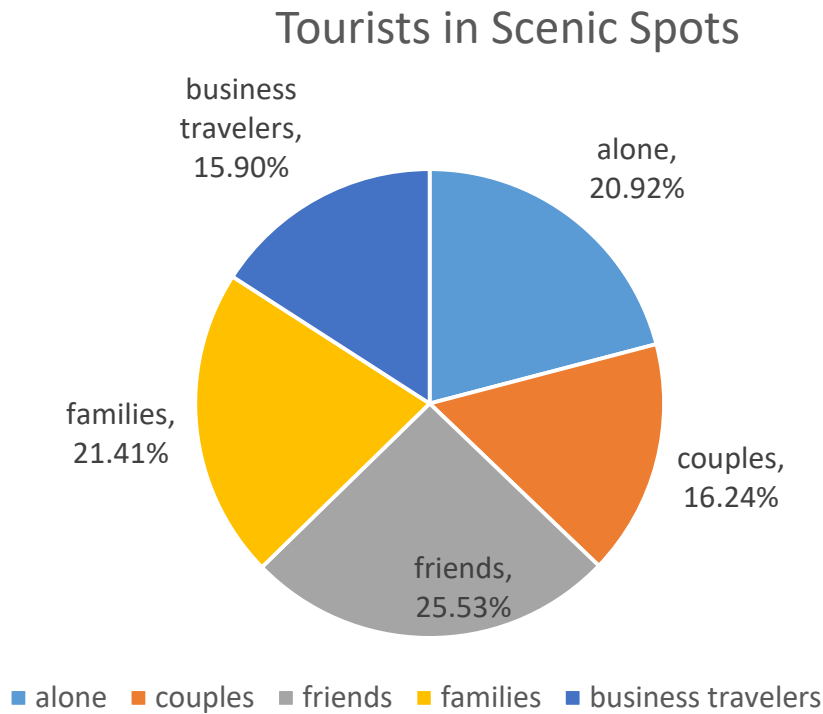
Note: *STAY* in this context means staying for more than 10 days after arrival



## 2.5 What Do They Want to Do?

### Traveling with Friends for Sightseeing, making Scenic Spots the Most Popular Places

- Through the 2018 Online Travel Agent (OTA) reviews, visitors are mainly friends (25.5%), followed by family (21.4%). It can be seen that in the overseas promotion materials of destinations and attractions, it is possible to appropriately increase the scenes and guidance of friends, parents and families.
- Through the 2018 tourist booking behavioral analysis, among the top 30 most popular excursions, the scenic spots accounted for the most (62.1%), followed by the local experience (17.2%). It can be seen that in China, there is still a lot of room for innovation in secondary consumer products and improvement of destination tourism product structure system.



Source: Online Travel Agent (left); Data from TripAdvisor on Inbound Booking (right)

## 2.5 What Do They Want to Do?

### The Most-Visited Tourist Attractions



the Forbidden Palace



Great Wall (the part in Mutianyu)



Tian'anmen Square



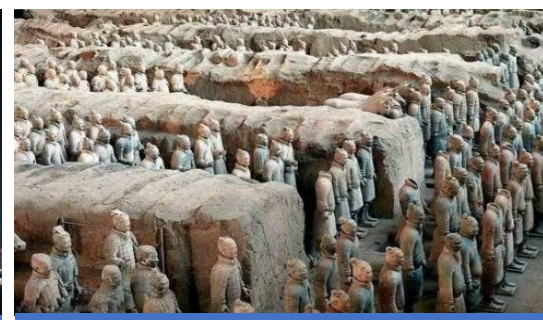
Beijing Hutong



Acrobat Show in Shanghai



the Bund in Shanghai



Terra Cotta Warriors



ZhouZhuang



## The Most-Visited Places

1. Ranking for the Most-Visited Places
2. Reviews on Online Travel Agents (OTA)
3. The Most Attractive Cities: Ranking
4. The Most Attractive Cities: Case Studies

### 3.1 Ranking for the Most-Visited Places

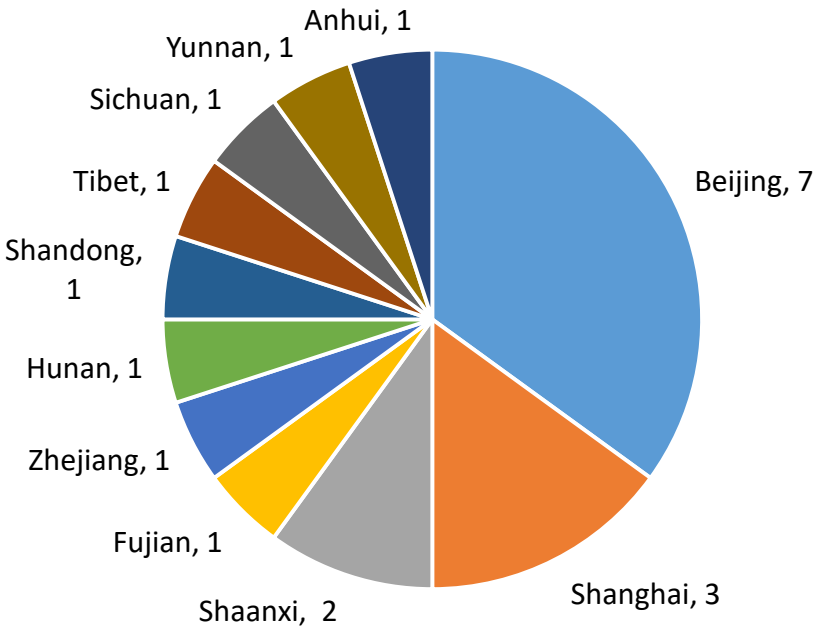
#### TOP3: the Palace Museum, the Bund and the Tian'anmen Square, Beijing with the Most Tourist Attractions

- The top five popular attractions are: the Palace Museum, Shanghai Bund, Tian'anmen Square, Summer Palace, and Museum of Terracotta Warriors and Horses.
- Among the popular scenic spots, there are many historical and scenic ones, followed by those featuring natural scenery. It can be seen that China's magnificent historical sites, beautiful natural scenery and profound historical humanities attract the attention of many foreign tourists.

TOP20 Tourist Attractions for Inbound Visitors

No.	Attractions	Province/ Municipality	No.	Attractions	Province/ Municipality
1	The Palace Museum	Beijing	11	Tiantan Park	Beijing
2	The Bund	Shanghai	12	The Olympic park	Beijing
3	Tian'anmen Square	Beijing	13	Oriental Pearl Tower	Shanghai
4	The Summer Palace	Beijing	14	Mt. Taishan	Shandong
5	Terracotta Warriors and Horses Museum	Shaanxi	15	Xi'an Ancient City Wall	Shaanxi
6	Mutianyu Great Wall	Beijing	16	Potala Palace	Tibet
7	West Lake	Zhejiang	17	Gulangyu Resort	Fujian
8	Zhangjiajie	Hunan	18	Chengdu Giant Panda Breeding & Research Center	Sichuan
9	Badaling Great Wall	Beijing	19	Lijiang River	Yunnan
10	Shanghai Disneyland	Shanghai	20	Mt. Huangshan	Anhui

TOP 20 Tourist Attractions  
(Categorized by Province/Municipality)



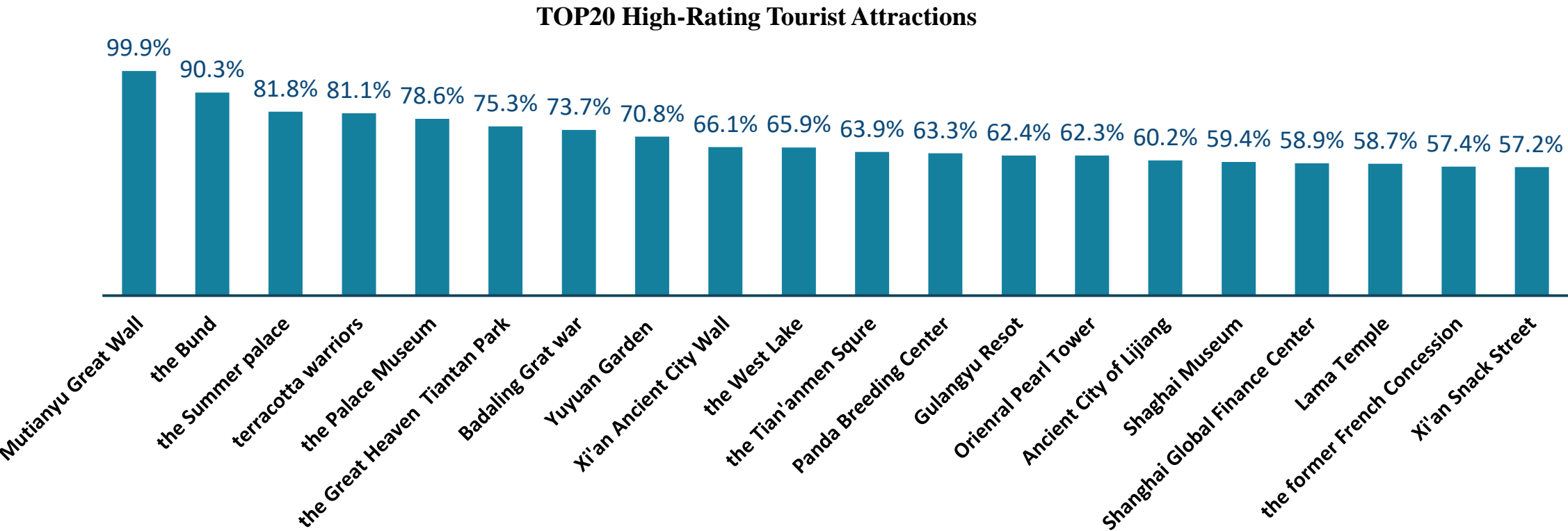
Source: Analytical Results Based on Google and OTA Reviews



### 3.2 Reviews on Online Travel Agents (OTA)

#### Historic Buildings and Scenic Spots Being the Most Popular, With Mutianyu Great Wall Ranking TOP1

- Through the 2018 Online Travel Agent (OTA) review, the number of historical buildings in the comprehensive index TOP20 takes the lead, followed by natural landscapes; Beijing Mutianyu Great Wall, Shanghai Bund and Beijing Summer Palace are among the top three.
- Note: The comprehensive index indicates the comprehensive judgment of tourists' evaluation of scenic spots. The comprehensive index=(the maximum number of comments on the attraction/the maximum number of comments on each attraction + the favorable rate of the attraction/the maximum value of the scenic spots)/2*
- It can be seen that the Badaling Great Wall is more of a frequently-mentioned word for national pride, but, due to the relatively low price and relatively few tourists, the Mutianyu Great Wall in Beijing has been promoted by the Online Travel Agent (OTA) and other travel agencies overseas with rising tourists' perception.

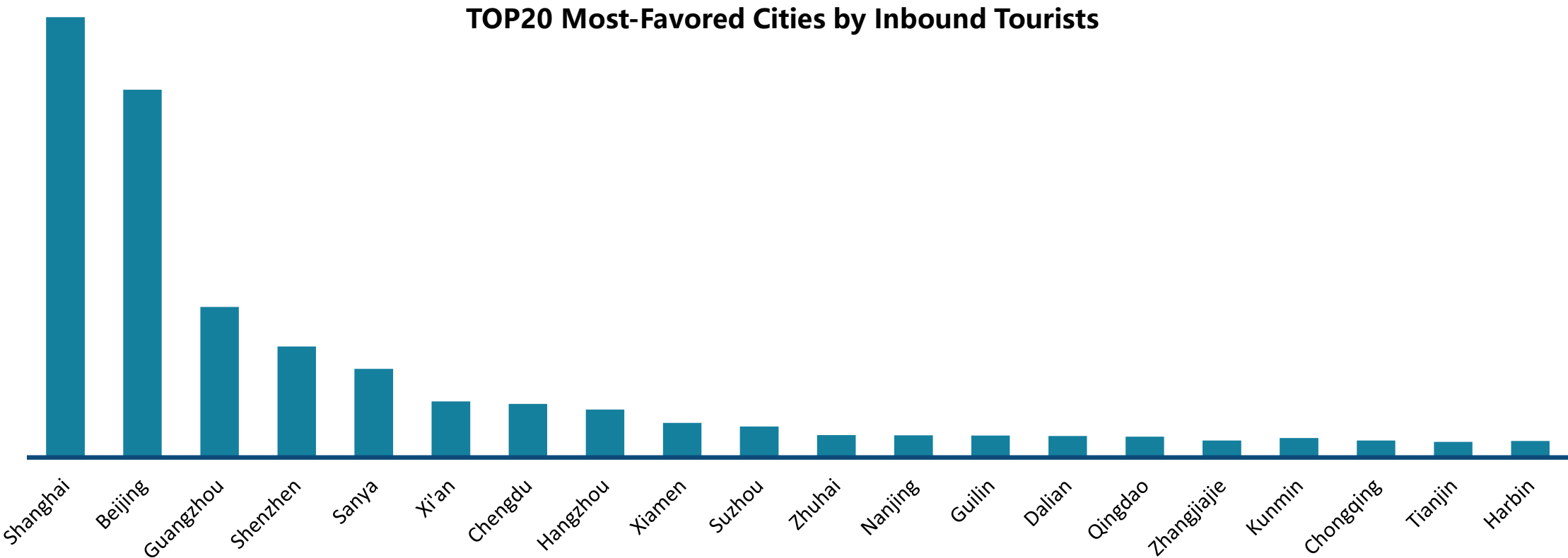


Source: Online Travel Agent (OTA)

### 3.3 The Most Attractive Cities: Ranking

#### TOP4: Shanghai, Beijing, Guangzhou and Shenzhen

- According to Internet search behavior, the most important Chinese cities for inbound tourists in 2018 are Shanghai, Beijing, Guangzhou, and Shenzhen, followed by Sanya, Xi'an, and Chengdu. These are cities with developed economy, long history, rich tourism resources and good traffic facilities. Tourism has an obvious influence their international image.





# BEIJING

- 
- A wide-angle photograph of the main gate of the Forbidden City in Beijing, China. The image shows a large, traditional Chinese architectural complex with red walls and a large courtyard. The central gate has a prominent roof with multiple tiers and ornate decorations. The courtyard is paved with light-colored stones, and the sky is overcast with grey clouds. The overall scene is a historical and cultural landmark.



- **A financial center:** multinational companies have great investment in this oriental city; Shanghai is also a regional center for nearly 900 foreign-invested R&D institutions;
- **Convenient transportation infrastructure,** including the Pudong International Airport and the Hongqiao International Airport;
- **Diversification of international tourism products:** in addition to cultural tourism, urban leisure, etc., business exhibitions also make great contributions to the inbound tourism industry of Shanghai;
- **Strong government support:** In August 2018, the Shanghai Municipal Government issued and implemented the *Guidelines on the Development of A World-Famous Tourist City with High-Quality Resources*. On October 9<sup>th</sup>, the government published the *Guidelines on Promoting the Development of Shanghai's Inbound Tourism*; and on October 12<sup>th</sup>, the municipal authority issued the *Guidelines on the Development of the Cruise Industry in Shanghai*, etc.



## 3.4 The Most Attractive Cities: Guangzhou

# GUANGZHOU

- **Business hub with thousands of years of history:** trade is the most important highlight for Guangzhou. The city is also well-known for its exhibitions and award ceremonies which also give Guangzhou an edge in attracting tourists from all over the world. The Canton Fair gives it another piece of international influence on the overall brand image of Guangzhou
- **Location:** the geographical advantage of connecting Hong Kong and Macau means that Guangzhou has become the main entry and exit of China both on land and for freighters.
- **Cultural heritage:** Guangzhou has a profound Guangfu culture, food culture, and TCM health culture.
- **Advanced infrastructure:** Guangzhou has been ranked high regarding hotel, transportation and service industries in Chinese cities.





## 3.4 The Most Attractive Cities: Shenzhen

### SHENZHEN

- **Theme parks:** Eastern OCT, Window of the World, Splendid China, Garden Expo Park, etc.
- **Diverse travel experience:** art, nightlife, dining, shopping and other features
- **External development opportunities:** the Greater Bay Area of Guangdong, Hong Kong,, the Pearl River Delta World-class Airport Group Construction, and Shenzhen international city construction have all promoted the construction of Shenzhen as the “coastal gateway” international hub.
- **Business travel:** as an international technology & innovation center and a reform and opening bridgehead, Shenzhen has always been a modern city at the forefront of economic development. Frequent business travel activities have helped the rapid development of tourism in the entire city.





## An Overall Picture of China's Inbound Tourism

1. Total Number of Inbound Visits Each Year
2. Gross Income form Inbound Tourism
3. Where Do Inbound Tourists Choose to Go?
4. Where Do They Come From?
5. Departure and Entry in Transport Hubs

## 4.1 Total Number of Inbound Visits Each Year

### A Record-High in 2018 with Growing Market Volume

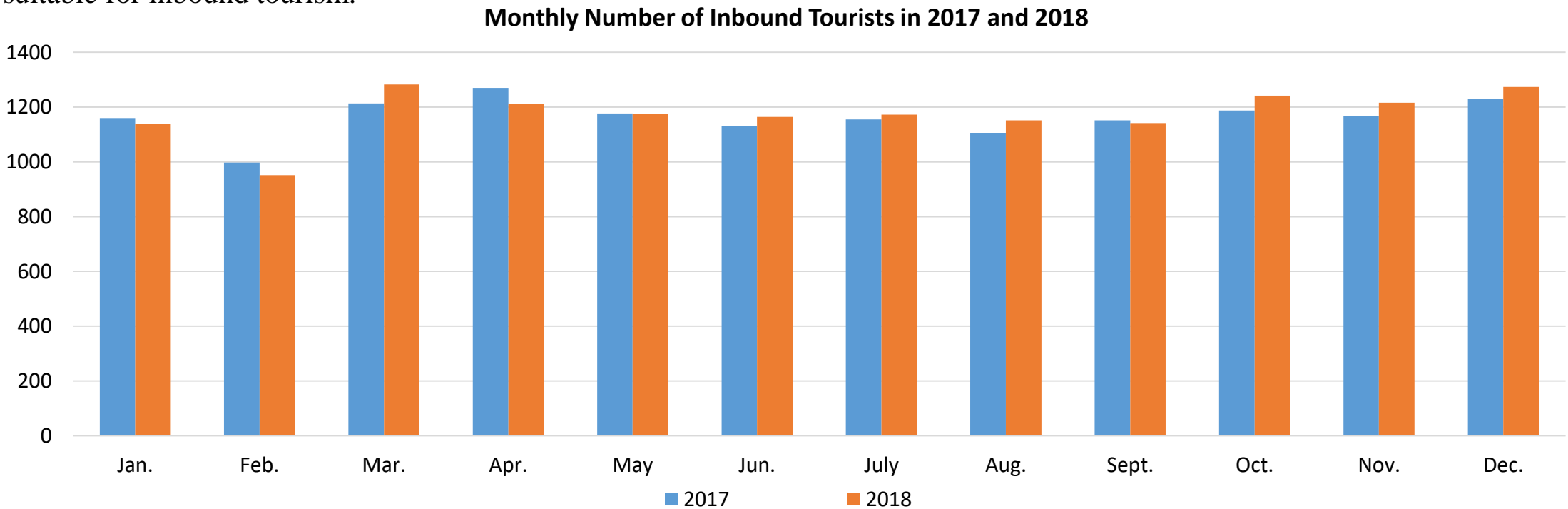
- In the past ten years, the number of inbound tourists in China has shown a regular fluctuation, but the overall trend has remained stable. The total number of inbound tourists has remained between 1.2 and 1.641 billion. In 2015, the inbound tourism market showed signs of recovery for the first time after three consecutive years of decline (2011-2014), and then increased year by year. China's inbound tourism, therefore, faces a new period of strategic opportunities.
- In 2018, the total size of China's inbound tourism market reached a record high, with 141.2 million inbound visits, an increase of 1.2% over the same period of the previous year.



## 4.1 Total Number of Inbound Visits Each Year

### High Seasons: Mar.-Apr. & Oct.-Dec; Low Season: January

- According to statistics, the number of tourists entering the country is relatively high in March-April, October-December, and the arrival of tourists is low in February. On the one hand, because of the moderate temperature in China's Spring and Autumn Period, the climate is pleasant and agreeable for traveling; on the other hand, December means a long Christmas holiday which allows foreign families to come to china. On the contrary, during the Chinese New Year in February, the Chinese people are busy returning and the traffic of the Spring Festival travelers is quite heavy. Most shopping malls and tourist attractions also have holiday breaks. Therefore, for foreign tourists, this month is not a good time for traveling in China. Therefore, relevant industries can choose to strengthen promotion and publicity before the peak of inbound tourists' travel, and carry out recreational activities suitable for inbound tourism.

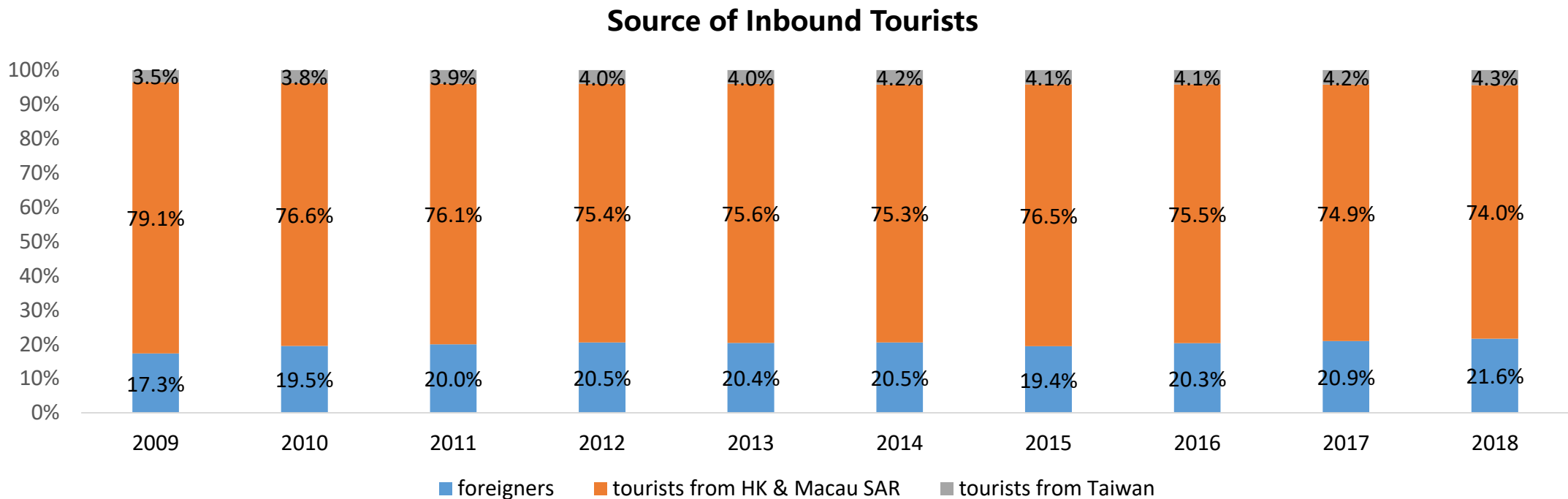




## 4.1 Total Number of Inbound Visits Each Year

### Visitors from Hong Kong and Macau as the Major Source, followed by Foreign Tourists

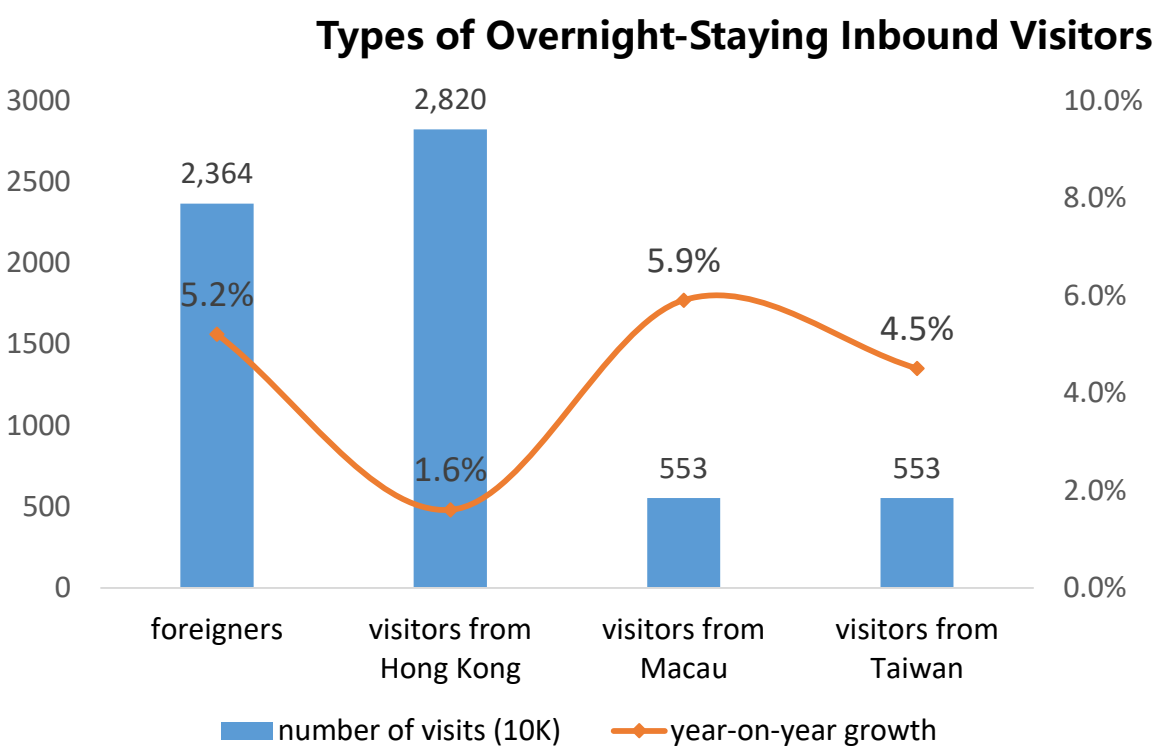
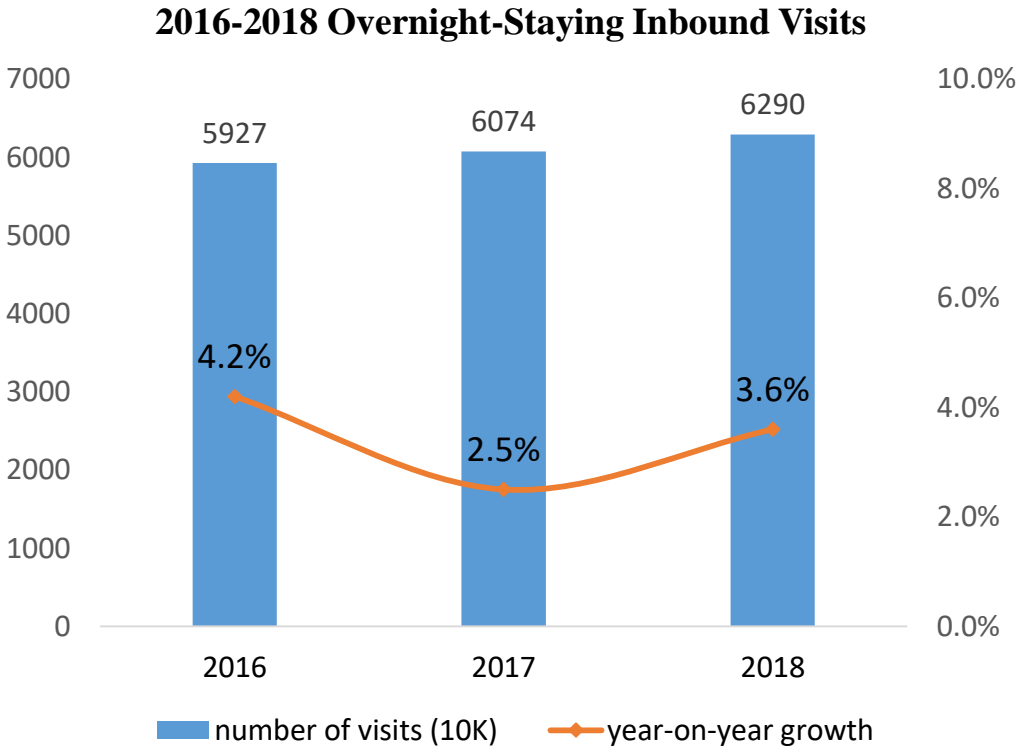
- In 2009-2018, the overall structure of China's inbound tourism market has not changed much. Among them, Hong Kong and Macao tourists are the main source in the mainland inbound tourism market, and their market share accounts for more than 74.0% of the total. The proportion of foreign tourists has decreased slightly in 2015, while in other years have been somehow improved. It can be seen that the growth of tourists in 2015 is mainly due to the increase in the proportion of tourists from Hong Kong, Macao and Taiwan.
- In 2018, foreign tourists reached 30.54 million, an increase of 4.7%; with Hong Kong tourists 79.37 million, down 0.5%; Macau tourists 25.15 million, an increase of 2.0%; Taiwan tourists 6.14 million, an increase of 4.5%.



## 4.1 Total Number of Inbound Visits Each Year

### 2016-2018: A Growing Number of Overnight Stays, with Hong Kong's Lion Share and Macau's Increasing Contribution

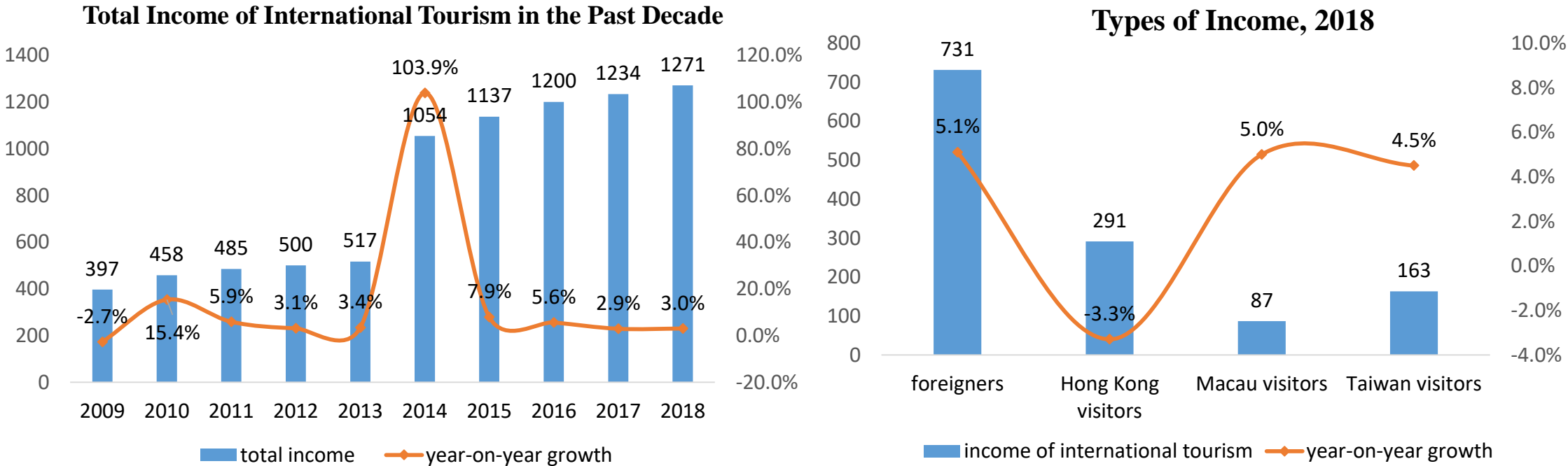
- In 2018, the number of overnight-staying visitors to China was 62.9 million, an increase of 3.6% over the same period of the previous year. Among them: 23.64 million foreign tourists, up 5.2% year-on-year; Hong Kong tourists 28.2 million times, up 1.6%; Macau tourists 5.53 million times, up 5.9% year on year;



## 4.2 Gross Income from Inbound Tourism

### Total Income of 127.1 Billion USD in 2018: Foreigners Spending More while Hong Kong Visitors Less

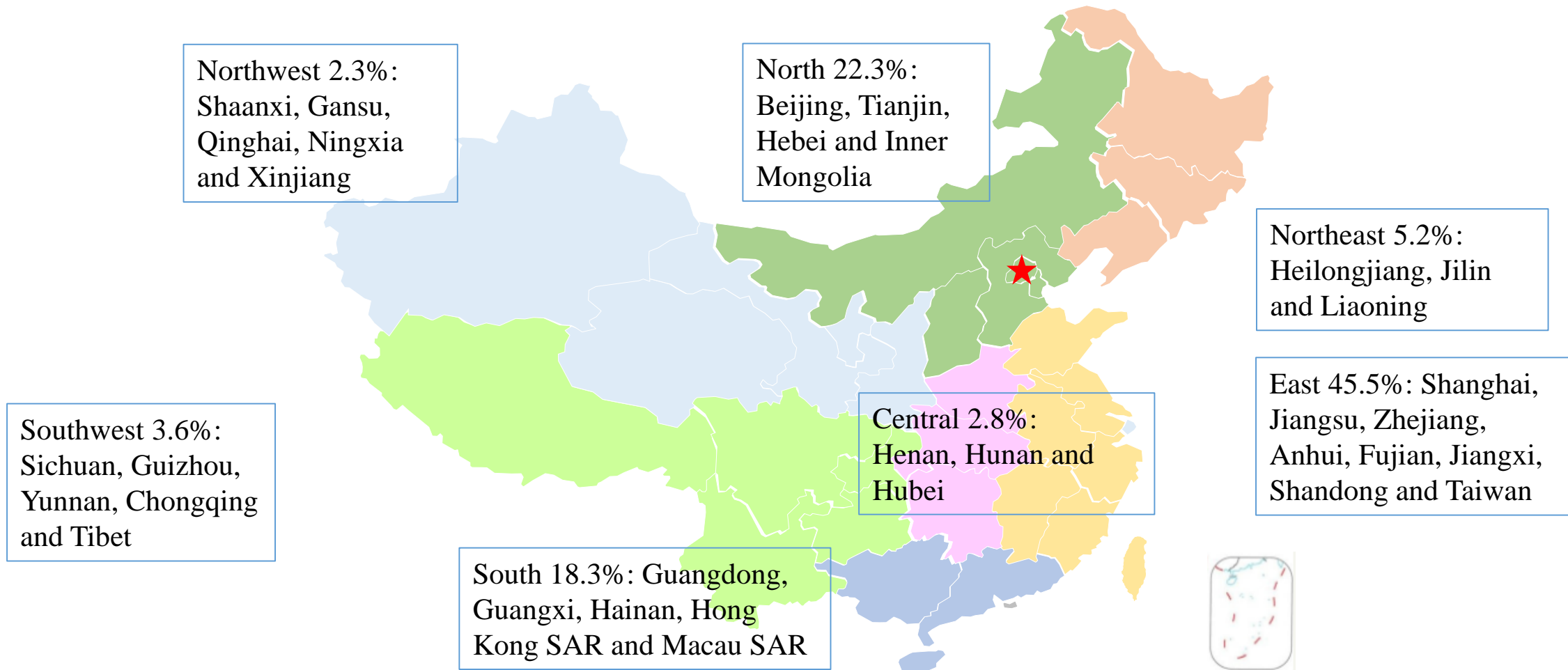
- Apart from the global financial crisis of 2008-2009, China's international tourism revenue has risen as a whole in the past decade. Among them, due to changes in statistics, China's inbound tourism foreign exchange income increased significantly by 105.4 billion USD in 2014.
- In 2018, China's international tourism revenue was 127.1 billion USD, an increase of 3.0% over the same period of the previous year. Among them: foreigners spent 73.1 billion USD in China, an increase of 5.1%; Hong Kong tourists, however, spent 29.1 billion USD on the Chinese Mainland, down 3.3%; Macau tourists spent 8.7 billion, up 5.0%; and Taiwanese tourists spent US\$16.3 billion, an increase of 4.5%.



## 4.3 Where Do Inbound Tourists Choose to Go?

### Eastern China Taking the Lead, Followed by the North and the South

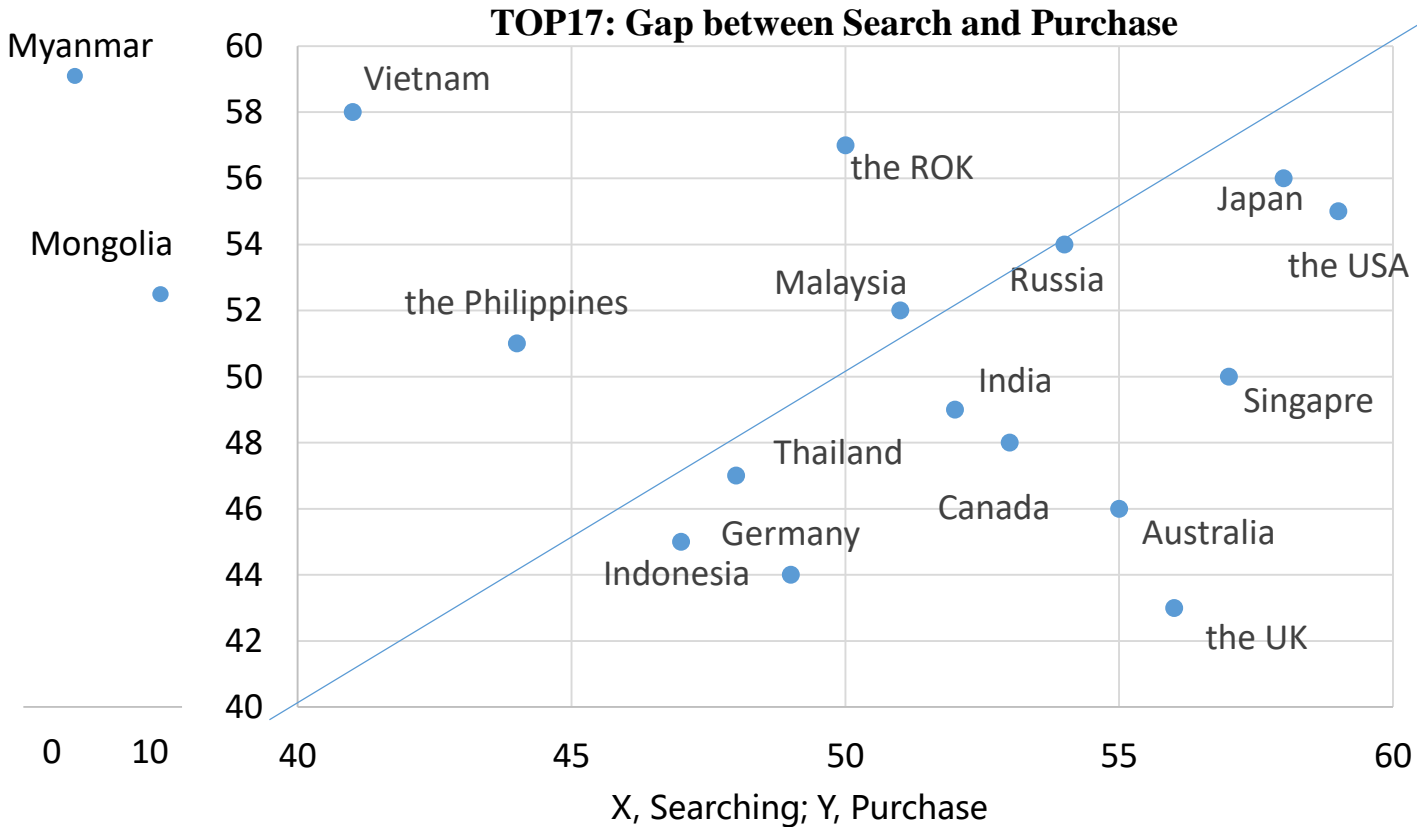
- According to the analysis of both air flight and hotel booking of inbound tourists in 2018, the bookings in East China accounted for a relatively high proportion (45.5%), nearly half, followed by North China (22.3%) and South China (18.3%).



## 4.4 Where Do They Come From?

### Myanmar, Vietnam, the ROK as Major Sources with many UK, Singapore, Australia Visitors Missed

- The Ministry of Culture and Tourism public information shows that the main source markets for inbound tourism in 2018 are Myanmar, Vietnam, the ROK, Japan, the US, the UK, Singapore, Australia (that is, visitors to the Internet search are larger than those who buy online). It can be seen that on the basis of consolidating the main source market, it is possible to consciously strengthen the promotion of the leakage market to enhance the conversion rate of tourists' search-purchase; on the other hand, the focus of the development of the inbound tourist source market can be along the Belt and Road Initiative, including developing countries such as BRICS and SCO member countries



TOP17: Gap between Search and Entry					
Country	No. for Entry	No. for Searching	Country	No. for Entry	No. for Searching
Myanmar	1	59	Singapore	10	3
Vietnam	2	19	India	11	8
the ROK	3	10	Canada	12	7
Japan	4	2	Thailand	13	12
the US	5	1	Australia	14	5
Russia	6	6	Indonesia	15	13
Mongolia	7	54	Germany	16	11
Malaysia	8	9	the UK	17	4
the Philippines	9	16			

Source: Ministry of Culture and Tourism (Searching), TripAdvisor (Purchase)

## 4.5 Departure and Entry in Transport Hubs

### Through Transport Hubs: Where Do Inbound Visitors Come From?

- In 2018, the number of inbound tourists arriving in China's Transport Hub cities is as follows. The routes and trains can be arranged according to the distribution of major customers in each city to ensure the convenience of international tourists.

#### 15 Transport Hubs in China and the TOP3 Sources of Inbound Tourists (2018)

Transport Hub	Country/Region	Transport Hub	Country/Region	Transport Hub	Country/Region	Transport Hub	Country/Region	Transport Hub	Country/Region
Beijing	the US	Guangzhou	Hong Kong	Xiamen	Taiwan	Tianjin	the US	Xi'an	the US
	the Netherlands		the US		Hong Kong		the ROK		the ROK
	Hong Kong		the ROK		the US		Japan		Hong Kong
Chengdu	the US	Harbin	Russia	Shanghai	the US	Urumqi	Hong Kong	Zhengzhou	the US
	Hong Kong		the ROK		Japan		Taiwan		the ROK
	Taiwan		Japan		the Netherlands		Kazakhstan		Hong Kong
Dalian	Japan	Kunming	Myanmar	Shenzhen	Hong Kong	Wuhan	the US	Chongqing	the US
	the ROK		Hong Kong		the US		Hong Kong		Hong Kong
	the US		the US		the Netherlands		the ROK		Taiwan

## Conclusions and Suggestions

1. Advantages and Disadvantages
2. Suggestions for Further Development



## 5.1 Advantages and Disadvantages

### Advantages

#### • Favorable Policies

The government has issued a series of policies and regulations on the development of inbound tourism, including *the 13th Five-Year Plan for Tourism Development* which clearly set out the development goals for the continued growth of inbound tourism. Besides, the General Office of the State Council also gives guidance on promoting the development of tourism throughout the country. *The State Council's General Office Guidance on Further Enlarging the Consumption Potential of Culture and Tourism* and the introduction of a series of other policies on promoting the development of local inbound tourism will also bring great opportunities to various provinces and municipalities.

#### • Improved International status

In recent years, China's Comprehensive national strength has continued to grow. People live and work in peace and contentment, while the society is stable and harmonious. At the same time, China's economy has contributed more and more to the world's total. China's international status has therefore increased significantly, and its international influence has grown accordingly.

#### • Stronger Cultural Self-confidence & Civilized Identity

As one of the birthplaces of world civilization, China has a glorious history and splendid culture. The precious ancient Chinese civilization is the common spiritual wealth of the Chinese people from all ethnic groups. Tourists from all over the world want to experience the Chinese culture, which draws countless visitors to our country.

#### • Rich Tourism Resources

China's vast land means rich and diverse resources of all kinds, many of which are known for their beautiful scenic spots, long history, ancient culture and profound heritage. At the same time, since the reform and opening up, China's remarkable achievements in economic and social development have become the core attraction of China's inbound tourism.

#### • A Safe Environment

China's overall social security is at a high level in the world. The hosting of major international conferences such as the Olympic Games and the World Expo provided an important window to present a true China to the world beyond. China's good security and the enthusiasm of Chinese residents for inbound tourists have convinced foreign tourists that their trip will absolutely be great.

#### • Accessibility

The total turnover of China's civil aviation transportation ranks the second in the world for 14 years in a row; the length of high-speed railways that have been put into use and under construction ranks the first in the world; as of the end of 2018, the scale of China's road network is 4,846,500 kilometers, including the highways being up to 142,600 kilometers, ranking the first in the world.

## 5.1 Advantages and Disadvantages

### Disadvantages

#### • Inconvenience of Visa Application to China

China's visa-free policy does not match the development of inbound tourism; the number of general visa-free countries is small, and there is basically no coverage of the main source market; the 72-hour and 144-hour transit visa-free policy, which is the driving forces of inbound tourism, rights for short-term stay and route matching are not in place either. Besides, the role of the market is limited; the threshold for visas to China is high with expensive application and long processing time.

#### • Environment and Supporting Services

After years of development, China's tourism infrastructure has improved significantly, but the level of internationalization, public service support and facilitation are still insufficient. For example, the foreign language signage systems in scenic spots, stations and expressways are not standardized and accurate.

#### • Extrusion effects

In 2018, the number of domestic tourists in China reached 5.539 billion. During the peak season, tourist attractions are overcrowded, reducing the viewing and dining experience of foreign tourists.

#### • Comprehensive Competitiveness of Products

The product homogenization and old-fashioned tourism products trend is obvious, the tourists are not very involved; the products are not rich enough, which leads to the inconsistent price of some products; the lack of new routes and leisure holiday packages give tourists no fresh experiences. At the same time, with the rapid domestic tourism market on the rise, a large increase in tourism demand directly led to the rise in scenic spot tickets and hotel, catering and other secondary consumer prices.

#### • Weather

Weather and climate are important factors influencing the tourism. The emergence of smog has not only become a key consideration for Chinese tourists when they travel, but also a direct negative factor that might discourage foreign tourists from coming to China.



## 5.2 Suggestions for Further Development

### Policy Making

#### • Introduction and Implementation of Related Policies

Strengthen the guidance from the national level to promote the development of inbound tourism, ensure the timely implementation of the province, city and district; measures can include tax relief, route development and other policies; build China's inbound tourism pilot areas; national and local governments making various positive effects shall have policy awards in accordance with their contribution.

#### • Visa

It is suggested that on the basis of pilot programs, the facilitation and standardization of China's overseas visa centers will be strengthened, visa-free transfer/entry will be gradually promoted.

#### • Talents for Inbound Tourism

Improve the standards such as college education, social training, professional quality examination and high-end talent assessment in this regard; provide talent reserve for China's inbound tourism development; improve the evaluation system of tour guide rating and payment for practitioners; strengthen the relationship among universities, enterprises and governments; improve the teaching method of college tourism majors.

### Supportive Measures

#### • International Public Service

Strengthen the development and construction of foreign language signage systems and interpretation systems; improve the development and popularization of foreign language navigation maps; step up the promotion of mobile payment functions for inbound tourists; introduce international bank card payment options for foreigners to spend.

#### • Overall Tourism Image Of The Country

Highly grasp the top-level design and unification of china's overall tourism image, and provide guidance and control on national and local tourism brands, including publicity slogans, tourism sub-brand system construction, etc.

#### • Traffic Accessibility

Vigorously develop international flight routes, improve the transportation capacity of cruise ships, and build network of high-speed rail tour in china; promote domestic traffic among inbound tourists with A worry-free experience.

## 5.2 Suggestions for Further Development

### Product Upgrading

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- **Strengthen the development of experience-based tourism products**

The integration of experiential products brings more viscous effects to this industry and stronger spontaneous promotion among tourists. In the context of the integration of cultural tourism, we should focus on strengthening the development of products that offer more opportunities for participation by the visitors and stimulate tourists' interaction and emotional input.

- **Continuously optimize the structure of tourism products**

The structural proportion among the service elements in the tourism products provided by different industries and departments of the tourism industry needs to be continuously optimized; for the characteristics of different market customer groups, the ability of organic combination of various individual tourism products needs to be continuously enhanced. In order to form a flexible combination of different content, different grades and different time allocations within a certain area or between destinations should be in place to meet the personalized and diverse travel needs of tourists.

- **Value the integration of technological, cultural and tourism products**

With the rise and advancement of high-tech technologies such as Internet of Things, AR/VR, holographic projection, 5G, etc., the innovation in tourism products, which is fueled by the high-tech means and integrated with local culture as the soul, will provide new possibilities to bring inbound tourists a immersive experience of Chinese culture and Chinese stories, and for the extension of the cultural tourism industry chain and its value exploration.

## 5.2 Suggestions for Further Development

### Marketing Innovation

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- **Diversification of Media Channels**

In addition to using traditional media and conducting promotional activities in the source of customers, it is necessary to strengthen the coverage of new media represented by social media, make full use of search engines, online videos and other online positions that play an important role in travel decision-making;

- **Better Design of Content**

At present, promotion overseas is still mainly based on simple and single tourist attractions. It lacks the display of multi-element fusion of “dine, live, travel and entertainment” and the promotion of family life experiences such as parent-child relations. Often, “humanities,” “heart-felt” and “emotional” marketing content can have better influence on the decision-making of the visitors.

- **Greater Public Exposure of Promotional Materials**

Tourism products based on tourist destinations should form a basic understanding among tourists through various publications, and should continue to increase the chances of reaching tourists through various ways and multiple paths, so as to fully interact with potential tourists.

- **Adopt Localized Strategies**

Increase cooperation with local tourism agencies in the source countries, and train first-line personnel to increase the attractiveness of destinations, and win more potential tourists.

## 5.2 Suggestions for Further Development

### Marketing Innovation

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- **Stable and Innovative Marketing Mechanism**

The major overseas exhibitions and promotions are funded by the competent national authorities, and the enterprises of various provinces and cities promote the overall overseas marketing based on the state; the main body of the overseas promotion of the destination is jointly promoted by the inter-provincial and inter-city bundled marketing.

- **Making Full Use of Big Data to Improve Decision-making**

Pay attention to the management and application of inbound tourism big data of the country, province, city and district (county); make full use of data to guide decision-making, and make accurate marketing of corresponding destinations (or products) for different customer groups.

- **Power of Good Examples**

Give full play to the role of port cities and large-scale tourism enterprises, strengthen tourism exchange activities with countries and regions of the world's major tourist destinations, so as to promote the overall development of China's inbound tourism.

- **Online and Offline Synergy**

The first-tier cities in China are the primary destination for overseas tourists to understand China, and they are also the main choice for inbound tourists. It is recommended to choose one or two to focus on becoming an “inbound tourism bridgehead”, that is, both an entrance of inbound tourists in the real world and a tourism highlight in the cyberspace.



## Special Thanks Goes to...

On concluding this report, we'd like to once again give sincere appreciation to Google, TripAdvisor, Gausscode Technology, SOJERN, Smart Steps (ChinaUnicom), Official Aviation Guide (OAG)) and other data providers as well as experts and scholars from different social sectors who, during seminars of all kinds, gave guidance that we cherish.