

2024-2025 Cross-border Tourism Consumption Trends Report



2024-2025 Cross-border Tourism Consumption Trends Report



mastercard

Trip.com Group



Preface /

The 2024-2025 Cross-border Tourism Consumption Trend report was jointly released by World Tourism Alliance, Mastercard, and Trip.com Group. This report takes a global perspective while focusing on China, relying on detailed data sources such as Mastercard's consumption insights and Trip.com's inbound and outbound product booking data. It studies overall consumption trends in global tourism as well as China's outbound and inbound tourism, aiming to provide reference for the high-quality development of the global tourism industry. In July 2024, the 2023-2024 Cross-Border Tourism Consumption Trend Report was published globally for the first time and attracted significant attention both inside and outside the tourism industry. From July to October 2025, the report writing team conducted thorough research and analysis on new trends and changes from the third

quarter of 2024 to the end of the second quarter of 2025, ultimately forming this report.

From the third quarter of 2024 to the end of the second quarter of 2025, the global tourism industry continued its previous growth momentum, maintaining steady growth. Experience-based travel continued to be an important new driving force for tourism development, with sports events and entertainment performances showing particularly strong pull effects on tourism.

Regarding outbound tourism, the total number of trips and total spending by tourists from Chinese Mainland continued to grow, with rapid growth in nearby short-haul destinations and niche destinations. The optimization of visa policies, the boost from



sports and cultural entertainment activities, and the recovery of international flight routes all contributed to promoting outbound tourism for Mainland Chinese travelers. Different traveler groups such as Generation Z, parent-child families, and senior citizens also showed distinct preferences for outbound travel. Experience, exploration, niche, and personalization have become new trends in outbound tourism.

Regarding inbound tourism, driven by the continuous optimization of visa-free and visa facilitation policies, inbound tourist numbers maintained rapid growth, with a significant increase in the number of travelers enjoying visa-free entry and longer stays. Large-scale sports events such as 2025 Chengdu World Games and 2025 Harbin Asian Winter Games had a clear driving effect on inbound tourism,

and cultural experience travel became a new hot trend. First-tier cities remain the most attractive destinations for inbound tourists, while a number of emerging destinations in third- and fourth-tier cities also saw significant growth in inbound visitor numbers. Spending on shopping and dining rose markedly, and inbound tourism consumption showed a diversified trend, mainly thanks to substantial improvements in payment convenience for inbound travelers. Measures such as metro card tapping and "Foreign Card On File" were widely welcomed by inbound consumers.

This report provides an in-depth analysis of a number of popular domestic and international destinations and events, including Spain, Malaysia, South Korea, Chengdu, and Jiangsu City Football League, aiming to offer reference for the development of other tourism destinations. At the same time, the report further focuses on the trend of "Travel like a local," pointing out that tourists increasingly prefer to deeply experience local culture, lifestyle, and community environment, making the concept of responsible travel more important than ever. The report calls on tourists to respect local culture, protect the ecological environment, and avoid over-tourism when exploring destinations, jointly promoting tourism toward sustainable and inclusive development. In addition, the report also puts forward relevant suggestions for the future development of outbound tourism, inbound tourism, and sustainable tourism.

This report is fully supported by the technical expertise of Mastercard's Advisors & Consulting Services department.

Table of Content /

Chapter 1 Global Tourism Industry Overview	06
1.1 Global Tourism Performance and Popular Destinations	07
1.2 Drivers of Global Travel Decisions	09
Chapter 2 Chinese mainland Outbound Tourism and Consumption Trends	12
2.1 Overall Trends in Outbound Tourism	13
2.2 Analysis of Popular Outbound Tourism Destinations	15
2.3 Changes in Outbound Tourists' Behavior	18
Chapter 3 Chinese mainland Inbound Tourism and Consumption Trends	24
3.1 Inbound Travelers' Profile and Origins	25
3.2 Product Booking Patterns among Inbound Travelers	29
3.3 Analysis of Consumption Patterns and Payment Behaviors among Inbound Travelers	31
Chapter 4 Case Studies of Popular Destinations	36
4.1 Popular Outbound Tourism Destinations	37
4.2 Popular Inbound Tourism Destinations	42
Chapter 5 Emerging Travel Trends	45
5.1 Trend 1: Emotions Now at the Heart of Travel Motivation	46
5.2 Trend 2: Local Culture Sparks Travel Inspiration	48
5.3 Trend 3: The Next Frontier: AI-Powered Travel Evolution	50
Chapter 6 Cross-border Tourism: Facilitation and Sustainability	51
6.1 Outbound Tourism Facilitation Suggestions	52
6.2 Inbound Tourism Facilitation Suggestions	54
6.3 Insights and Reflections on Sustainable Development	57
Contributors to the Cross-border Tourism Consumption Trends 2024-2025	61





Chapter 1

Global Tourism Industry Overview

1.1

Global Tourism Performance and Popular Destinations

Global Tourism Continues to Grow Steadily, with Both the Number of Travelers and Travel Expenditures Consistently Increasing

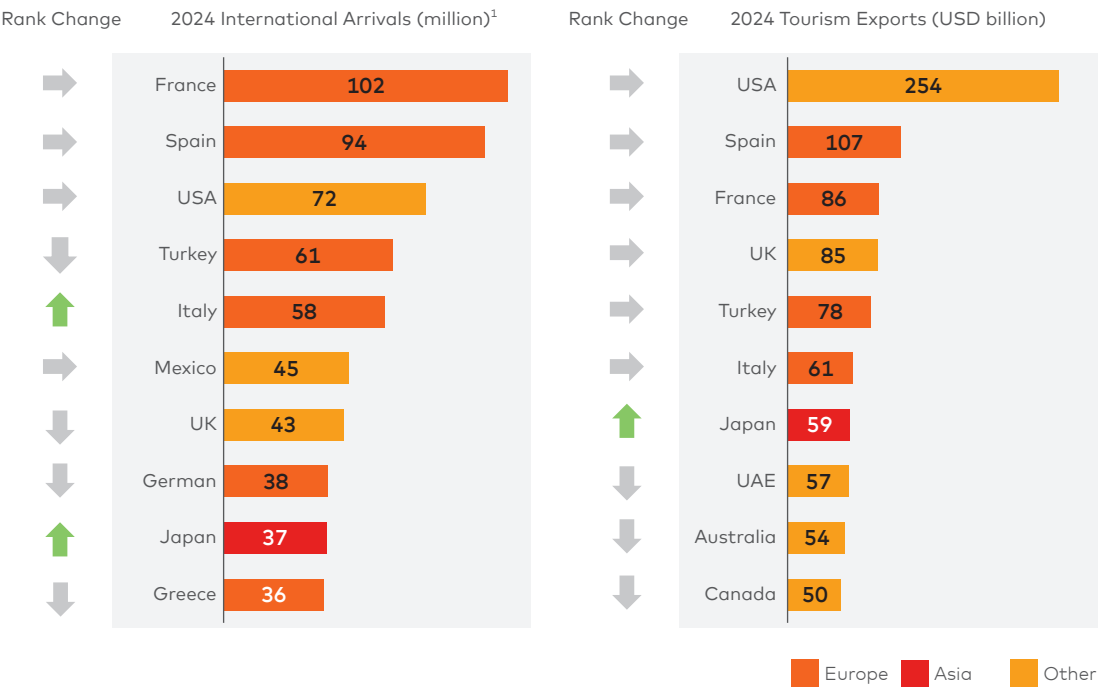
According to UN Tourism, in the first half of 2025, over 690 million tourists travelled internationally, about a 5% increase compared to the same period in 2024. The number of international tourists is projected to grow by 3% to 5% in 2025. International tourism spending reached \$1.7 trillion in 2024, approximately 11% increase year-on-year. This series of data not only demonstrates the strong resilience shown by the global tourism industry in the face of economic uncertainty but also reflects people's continued demand for travel experiences and consumption.



Europe Remains the World's Largest Destination, While APAC Grows Rapidly

With rich culture, diverse landscapes, and deep historical heritage, Europe has remained the world's largest destination region. According to UN Tourism Data, Europe attracted 747 million in 2024(+5% over 2023) and 340 million in 25H1 (+4% over 2024H1) international arrivals. Asia and the Pacific, the fastest-growing region thanks to its multicultural appeal, enticing cuisine, and relatively low cost of travel, saw 316 million international arrivals in 2024 (+33% over 2023). This strong momentum continued in 2025H1(+12% over 2024H1)). Notably, Northeast Asia—particularly Chinese mainland and Japan—stood out with exceptional performance.

2024 Top 10 Destinations



*Data Source: UN Tourism

1. UNTourism did not include China's data in its 2024 statistics. According to Chinese government website, the Chinese Mainland received approximately 27 million foreign arrivals in 2024 (excluding visitors from Hong Kong, Macao, and Taiwan). Under this definition, Chinese Mainland did not rank among top 10 destinations. However, when including tourists from Hong Kong, Macao, and Taiwan, Chinese Mainland received approximately 132 million visitors, making it the top-ranked destination under this broader definition.

1.2

Drivers of Global Travel Decisions

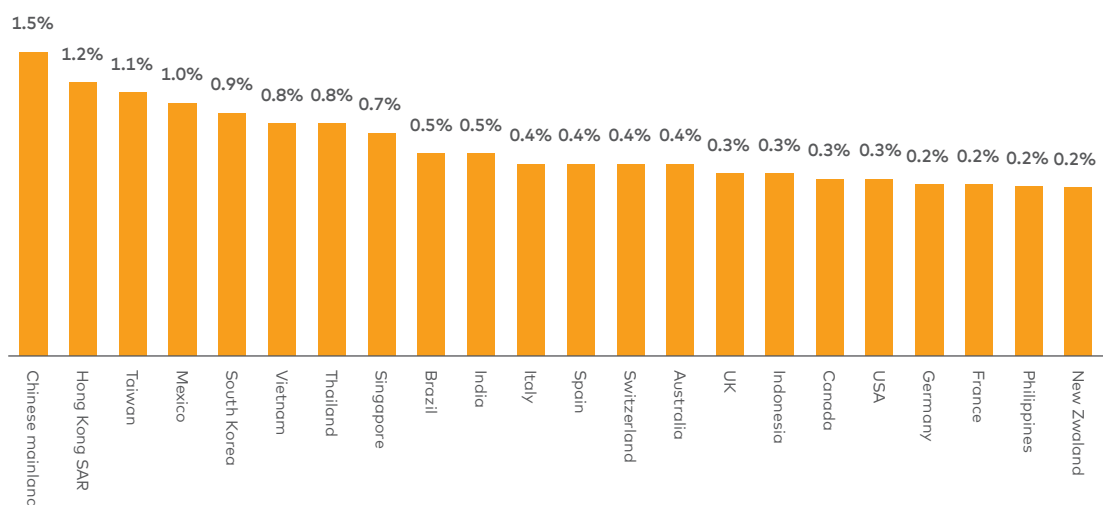
Global Travelers: Motivated by Value, Driven by Experience, Inspired by Icons

Amid sustained and robust global tourism growth in 2025, the key factors driving travel decisions continue to evolve. While exchange rate fluctuations and geopolitical dynamics persist in influencing travel choices, consumers' passion for travel and purpose-driven consumption motivations remain powerful forces reshaping the industry's development landscape.

- **Exchange Rates Shape Travel Decisions**

Travelers from Asia tend to be more sensitive to exchange rate shifts: a 1% depreciation of the Japanese Yen (JPY) against the RMB is associated with a 1.5% increase in the number of tourists from the Chinese mainland to Japan. In contrast, the number of visitors from New Zealand and the U.S. rises only around 0.2% in response to the same degree of depreciation relative to their currencies. In 2024, the number of Singaporean visitors to Japan hit record highs — thanks to a 40% rise in the Singapore Dollar (SGD) vs. JPY, even as airfare and hotels got pricier.

Foreign Exchange Impact on the Number of Inbound Tourists to Japan



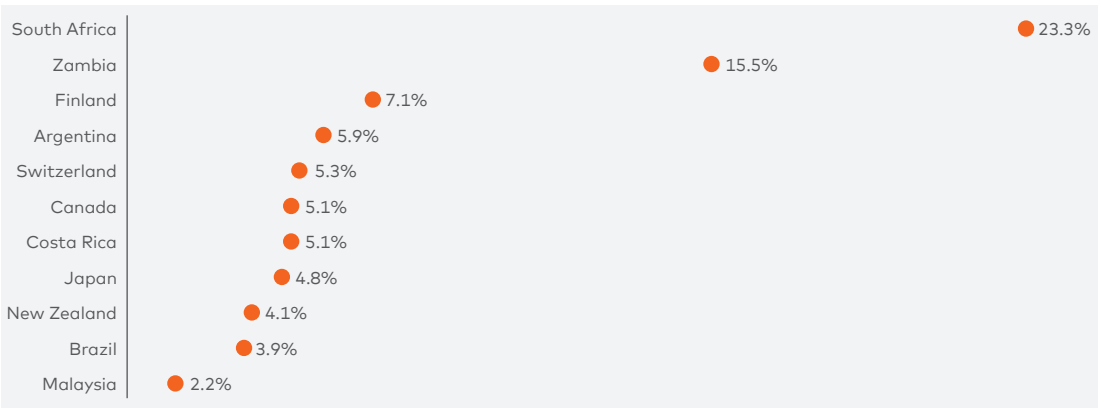
***Note:** Estimated % growth in the number of inbound tourists to destination for every 1% depreciation of the destination's currency against the source market currency.

Source: Mastercard Economics Institute(MEI), Aggregated and anonymized data

• Investing in Moments

Today's consumers are clearly prioritizing purposeful experiences. MEI has developed a Wellness Travel Index (WTI)¹, which highlights the destinations leading the way in wellness experiences and self care. Namibia, South Africa and Thailand top the WTI with eco-lodges and retreats. Besides, combination of wanderlust and social media is encouraging tourists to search for adventure. African countries such as South Africa and Zambia show the highest share of national park spending among the countries analyzed. Taking South Africa as an example, national parks related spending accounts for 23.3% of total cross-border travel spending.

National Park Share of Total Cross-border Visitor Spending in 2024

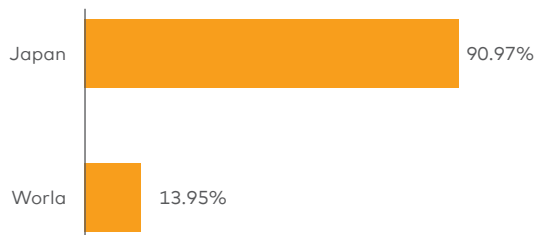


• Boost Tourism Spending With Sports and Exhibition Events

Sports events and large activities are fueling a tourism boom, with tournaments like the Los Angeles World Series and the Champions League attracting waves of international visitors. Japanese spending in Los Angeles surged 91% during the 10 days around Shohei Ohtani's World Series debut, showcasing the powerful draw of sports events for fan travel. In the days surrounding the Champions League final, Spanish and German tourists spent more than usual in London. German spending was up 61% YOY, while Spanish spending spiked by 148% YOY, suggesting that supporters of the victorious club celebrated by splurging. Large international exhibitions have also become new growth drivers for tourism consumption. The Osaka World EXPO, as a globally anticipated event, attracted visitors from all over the world. During the World Expo, cross-border spending around the relevant venues increased significantly, demonstrating the strong driving effect of the exhibition economy on the tourism market. While visiting the Expo, tourists often extend their stay, participate in more local cultural experiences and consumption activities, further stimulating diversified spending on accommodation, dining, transportation, and more.

2024 World Series - Los Angeles games

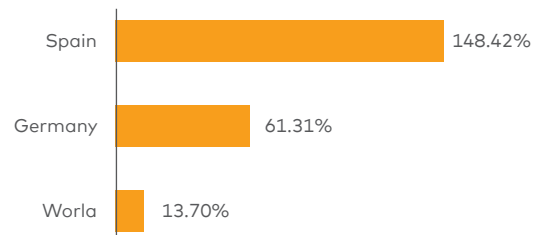
% YOY growth in cross-border spending within five miles of the event location on 5 days before and after the event



***Source:** Mastercard Economics Institute(MEI), Aggregated and anonymized data

2024 Champions League Final in London

% YOY growth in cross-border spending within five miles of the event location on 5 days before and after the event



***Source:** Mastercard Economics Institute(MEI), Aggregated and anonymized data

1. The WTI is calculated using the share of cross-border accommodation spending at wellness-related merchants, multiplied by each country's share of global wellness-related accommodation transactions.



Chapter 2

Chinese Mainland Outbound Tourism and Consumption Trends

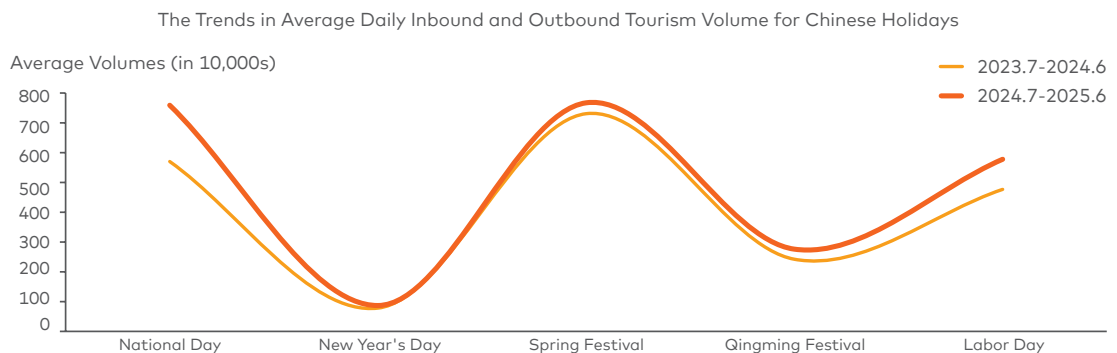
2.1

Overall Trends in Outbound Tourism

Outbound Tourism Heat Continues to Rise, Moving Into Steady Growth

According to Trip.com Group insights, outbound tourism from Chinese mainland entered a stage of steady growth from Q3 2024 to the end of Q2 2025. Public holidays remain the primary demand peaks, with Labor Day and National Day driving the most significant surges in outbound trips. This acts as key catalysts for unlocking latent travel demand, providing sustained and resilient growth momentum for the industry.

Trends of Chinese mainland Outbound Tourism



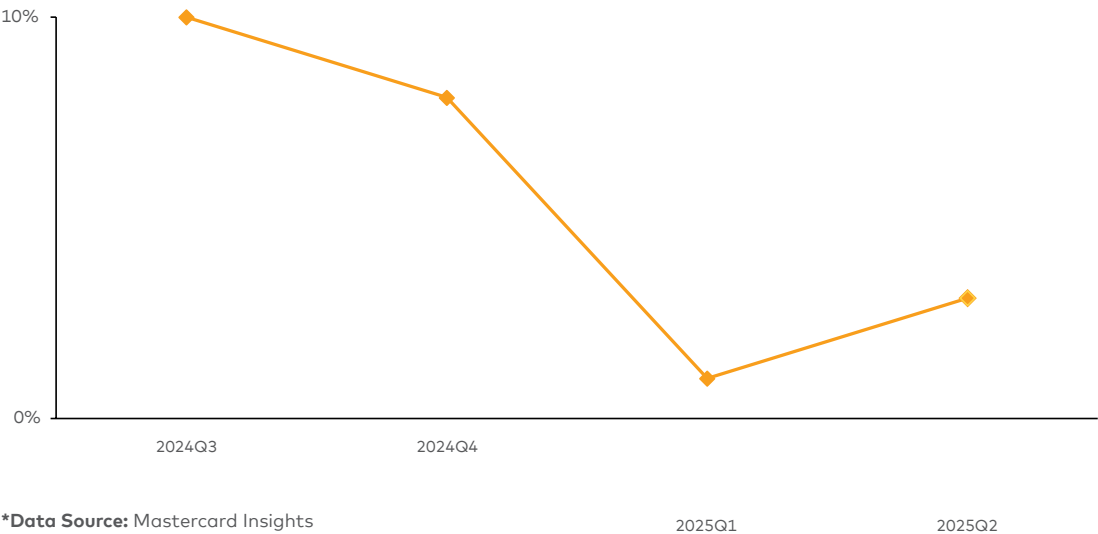
*Data Source: Civil Aviation Administration of China, National Bureau of Statistics of China



The Increase in Outbound Trips is fueling consistent growth in consumption

From Q3 2024 to Q2 2025, Chinese mainland residents offline outbound consumption has maintained growth with a gradually stabilizing rate. Overall, consumption growth was mainly driven by rising outbound trips. As outbound travel becomes increasingly widespread, outbound consumption is growing in both coverage and frequency while maintaining steady total growth, reflecting the outbound tourism market's vigorous and lasting vitality.

Year-on-Year Changes in Offline Consumption of Chinese mainland Outbound Tourists



2.2

Analysis of Popular Outbound Tourism Destinations

Short-haul Destinations Lead the Outbound Tourism Market

From Q3 2024 to Q2 2025, China's outbound travel market has shown a new pattern of "short-haul priority, experience-driven." According to Trip.com Group, Japan remains firmly in the top spot, while South Korea has risen to second place, surpassing Thailand, highlighting the continued appeal of East Asia. Southeast Asian countries such as Malaysia, Indonesia, and Vietnam have seen rising popularity, becoming key growth points for short-haul outbound travel. Meanwhile, the Maldives has entered the list of popular destinations, reflecting growing interest in niche, high-end travel markets.

Long-haul outbound travel shows differentiation: The popularity of the United States and Canada as North American destinations has declined, indicating that visa policies, flight capacity, and costs are constraining demand. In contrast, Italy's ranking in Europe has risen, reflecting the growing appeal of cultural experience tourism.

Proportion and Ranking Changes of Top 15 Outbound Air Ticket Search Destinations

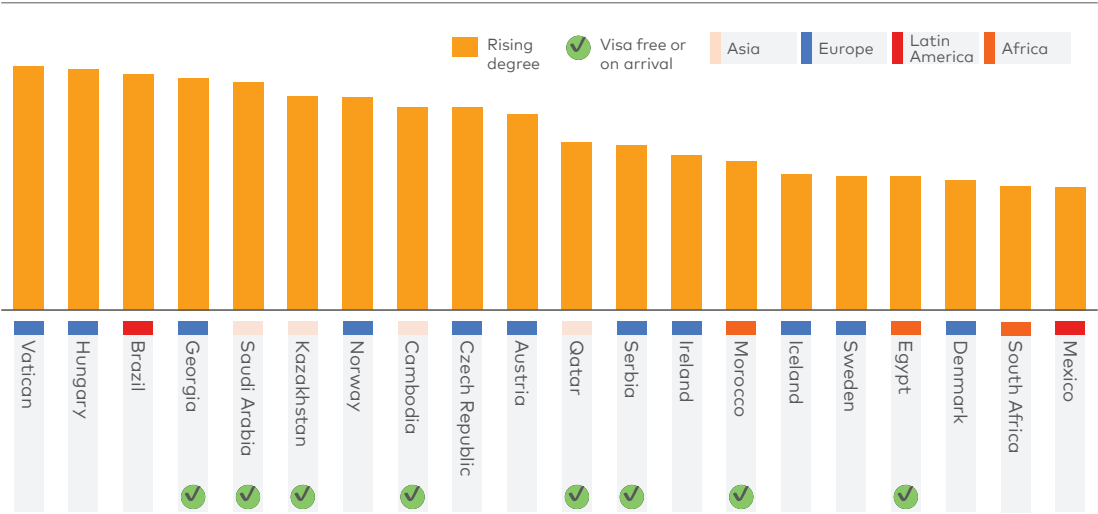


*Data sources: Trip.com Group, as of June 2025

Niche Destinations are on the Rise

The Chinese outbound travel market is becoming increasingly diversified, with niche destinations gaining attention. Geographically, Northern and Eastern Europe remain favorites among Chinese tourists, showing sustained enthusiasm for European culture, art, and natural scenery. At the same time, emerging destinations in Asia and the Middle East—such as Kazakhstan, Cambodia, Saudi Arabia, and Qatar—are rapidly rising, reflecting the growth in short-haul and exploratory travel demand. Morocco, Egypt, South Africa, Mexico, and other African and Latin American countries are also seeing increased popularity, indicating a diverse pursuit of unique cultural experiences and high-quality vacations.

Changes in Outbound Travel Volume of Chinese Mainland's Tourists for Niche Destinations



*Data sources: Mastercard Insights, Q3 2024 to Q2 2025

Multiple Factors Reshaping the Landscape of Popular Outbound Destinations

Key drivers: relaxation of visa policies; changes in international flight routes; boom in cultural and tourism activities; and diversification of travel preferences

- Visa Policy Relaxation

The continuous relaxation of visa policies has significantly improved outbound travel convenience. Saudi Arabia and Qatar have implemented visa-free or visa-on-arrival policies for Chinese tourists, and Japan and South Korea have also relaxed visa requirements. European countries such as Georgia and Serbia have further lowered entry barriers through visa-free or simplified procedures. These policy changes have brought previously less-visited destinations into the mainstream, greatly increasing their attractiveness.

- **Boom in Cultural and Tourism Activities**

Cultural and tourism events such as concerts and sports competitions have become important drivers attracting Chinese tourists. For example, official data shows that in 2024, 3.8 million Chinese tourists visited Malaysia, making China the largest source country outside ASEAN. With many major concerts scheduled for 2025, the Malaysia Tourism Board expects Chinese tourist numbers to reach 5 million, aiming to surpass 7 million by 2026. Meanwhile, the concert economy in Japan and South Korea continues to heat up, and Middle Eastern countries are also attracting international tourists through major events (such as the World Table Tennis Championships).

- **International Flight Routes Adjustments**

The structure of international routes is undergoing significant changes. On one hand, traditional long-haul routes are limited by political factors; on the other, as China's economic and trade relations with Central and Western Asia and North Africa deepen, related flight capacity is rapidly increasing. Meanwhile, Japan remains a highly popular destination, with a significant increase in passenger volume on China–Japan routes. Airlines from both countries have been intensifying flight schedules to meet the rising travel demand. The ongoing optimization of route networks not only enhances overall capacity but also further fuels the momentum of Japan's tourism market.

- **Niche Destinations Stand Out with Unique Advantages**

Niche destinations are emerging in the outbound market due to their unique natural landscapes, cultural heritage, and activity experiences. African countries like Morocco, South Africa, and Egypt offer rich resources and relatively low travel costs; Eastern European countries like the Czech Republic and Hungary combine historical depth with urban charm; Iceland in Northern Europe attracts tourists with its unique natural scenery; and South American countries like Brazil and Chile are gaining popularity for eco and adventure tourism, appealing to high-end and in-depth travelers. These differentiated advantages make such destinations new choices for Chinese tourists.

2.3

Changes in Outbound Tourists' Behavior

The Decision-making Behavior for Outbound Tourism among Different Segments is Diverging Now

In the current outbound tourism market, Generation Z, families with children and seniors, have become typical customer segments. Each group exhibits distinct decision-making behaviors regarding outbound tourism, reflecting diverse consumption logics and market trends. Travel companies can drive product innovation, service upgrades, and channel optimization based on the needs and decision-making patterns of these different customer segments, promoting a more refined and experience-oriented development of outbound tourism and achieving sustainable industry growth.

- **Generation Z: Digitally-driven "Spontaneous Travelers"**

Young Generation Z travelers tend to make quick and straightforward decisions for outbound tourism, embodying a "spur-of-the-moment" travel style. They value cost-effectiveness and the social media appeal of destinations. As digital natives, they prefer efficient decision-making and heavily rely on digital tools and social medias. On one hand, they quickly access popular travel guides via social media and tailor itineraries to personal preferences for easy and convenient travel. On the other hand, with the advancement of AI technologies, more young people are using tools to assist in travel planning. These tools not only generate complete itineraries but also recommend attractions, routes, hotels, and restaurants based on user needs, even helping with ordering food. The rich functionality is highly favored by young users, while also presenting new challenges for merchants—how to stand out in the AI era has become a new marketing topic.

- **Families with Children: Rational Planners Who Prioritize Safety and Education**

Families with children typically follow traditional planning-based decision-making patterns. Most families compare options in advance, focusing on comfort, safety, educational value, and child-friendly hotel amenities. They prefer visa-free countries and themed travel routes, such as Semporna in Malaysia or Japan's dual theme parks. These families not only value entertainment but also emphasize educational aspects, willingly paying extra for value-added services like "professional guided tours" or "wildlife tracking in protected areas," aiming to enhance their children's knowledge and development through travel. Safety is a top concern, and they favor services like Chinese-speaking guides. They invest time carefully comparing and booking destinations and products. Promotions offered by platforms, such as "free tickets for

children" and "family room discounts," effectively encourage their early planning behavior.

- **Seniors: Determined Practitioners of In-depth Travel Experiences**

Seniors plan outbound tourism more cautiously, emphasizing health, safety, and cultural experiences. With more leisure time, they prefer long-duration travel and have strong preferences for "extended stays in one location," "seasonal scenic experiences," and "in-depth official guided tours". Although some seniors are beginning to use digital tools for online booking through their children or travel agencies, they still heavily rely on human customer service during decision-making, maintaining a cautious attitude and spending more time gathering information and comparing itineraries. Health, safety, and cultural experiences are the core drivers of their early planning. They prefer high-star hotels and comfortable transportation, aiming to deeply understand local culture and enjoy professional commentary and specialty cuisine. Therefore, they arrange itineraries in advance to ensure stability and service quality.

Traditional Sightseeing is Further Transforming into 'Experiential' Travel, with the Concert Economy Emerging as a New Growth Highlight

According to data from Mastercard and Trip.com Group, Chinese outbound tourism spending is steadily shifting toward "experiential" consumption. Among major spending categories, Transport is growing the most at nearly 20%, indicating that travelers prefer more convenient and diverse options such as multi-city itineraries and premium transport services. Entertainment and dining saw the second- and third-highest spending growth respectively, reflecting growing demand for immersive experiences at destinations—cultural activities and culinary exploration are becoming key components of outbound tourism.



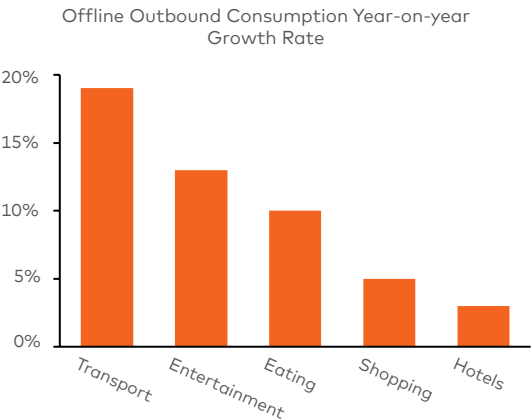
Trip.com data also shows that per capita local spending continues to grow, suggesting longer stays and a stronger inclination toward engaging with local life, cultural experiences, and personalized services.

In terms of entertainment spending, beyond traditional attractions like theme parks, zoos, and historical sites, "traveling to a city for a concert" has become a new trend in outbound tourism, expanding from domestic to international destinations. Increasingly, young consumers are combining overseas concerts with travel plans, forming a "concert + tourism" consumption model. Trip.com data reveals that during SEVENTEEN's Japan tour, Chinese bookings to Japan surged by 57% week-over-week. This not only highlights the strong purchasing power of fan-driven economies but also marks a shift in outbound tourism from traditional sightseeing to cultural experience-based consumption. As Chinese artists gain more international influence, "concert + tourism" is gradually becoming a major driver of overseas travel.

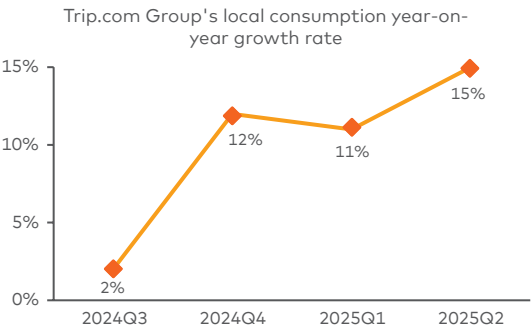
In contrast, shopping and accommodation saw relatively modest growth, indicating a decline in the appeal of traditional spending categories. Travelers are becoming more rational, focusing on value and necessity.

In summary, outbound tourism spending is evolving from traditional shopping and lodging toward convenient transportation, cultural and entertainment experiences, and deeper local engagement—reflecting an upgrade in travel behavior and a shift in consumer mindset.

Changes in Types of Outbound Tourism Consumption



*Data source: Mastercard Insights, from Q3 2024 to Q2 2025



*Data source: Trip.com Group, from Q3 2024 to Q2 2025

Outbound Travel among Seniors Heats up, with a Strong Preference for off-peak Trips

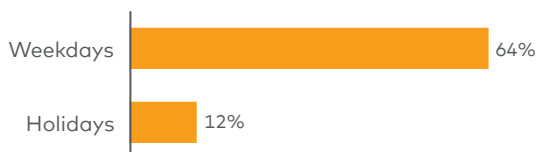
From Q3 2024 to the end of Q2 2025, outbound travel among China's senior population has continued to surge, making them one of the fastest-growing segments in the tourism market. According to Ctrip data, by the end of 2024, travel bookings by people aged 50 and

above increased by 34% year-on-year, with outbound travel orders rising by more than 60%. By June 2025, this group accounted for over 18% of outbound travel, gradually becoming a key driver of market growth.

Unlike younger travelers who prefer peak holiday periods, seniors tend to favor off-peak travel. Ctrip data shows that in the week following the 2024 National Day holiday, senior travel bookings grew nearly 20% year-on-year; on weekdays, seniors accounted for

as much as 64% of trips, while holiday travel represented only 12%.

Senior Travelers' Travel Habits: Weekdays vs Holidays



*Data source: Trip.com Group

Seniors are not only traveling more frequently but are also willing to pay for high-quality tourism products. Ctrip data indicates that the tendency index (TGI) for seniors toward four-star and five-star hotels is around 130 (with 100 as the average, and higher values indicating greater interest), surpassing other age groups.

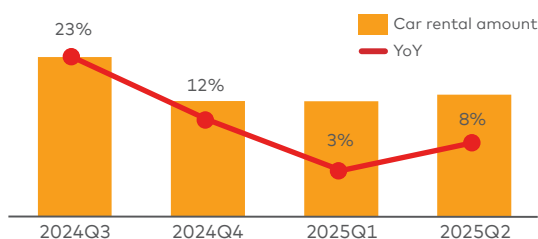
This trend is driven by seniors' combined advantages in financial stability, time flexibility, health, and cultural aspirations. Most retirees have steady pensions and savings, giving them strong purchasing power. Free from work schedules, they can plan trips flexibly, avoid peak periods, and enjoy a more comfortable travel experience. With growing health awareness and improved medical standards, seniors are increasingly eager to enrich their lives and stay active through travel. Tourism is becoming an important way for them to explore the world, broaden horizons, and realize personal value.

Transition from "Standardized Supply" to "Personalized Demand"

As tourism consumption continues to upgrade, group tours are rapidly evolving toward customized and independent travel. According to Ctrip data, overseas car rental orders during the 2025 Spring Festival increased by 42% year-on-year, while overseas chartered car tours grew by 20%. During this year's May Day holiday, overseas chartered car tour bookings on Trip.com rose nearly 25% year-on-year, with Japan chartered car tours expected to increase by 60%. Mastercard insights show that overseas car rental spending during the same period grew by 12% year-on-year. This trend not only

reflects travelers' emphasis on control over their itineraries but also further accelerates the popularity of personalized travel options.

Mastercard's Overseas Offline Car Rental Amount and Growth Rate



*Data source: Mastercard Insights

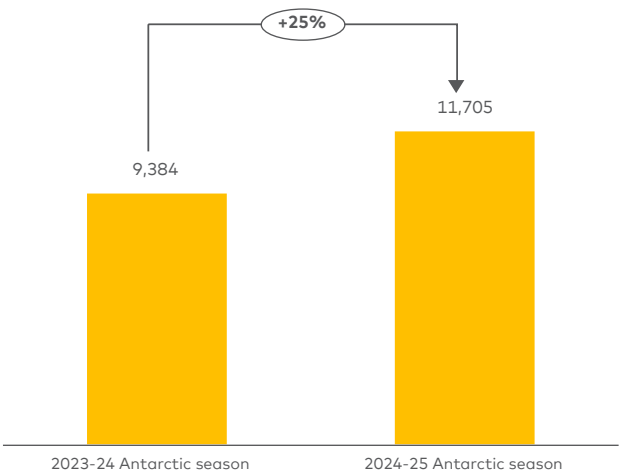
Travelers' pursuit of autonomy and personalized experiences is growing stronger. The traditional standardized group tour model is gradually being replaced by more flexible travel options that better meet individual needs. This shift is driven by several factors. First, changes in consumer attitudes toward travel have made "customization on demand" the new norm, with more travelers wishing to plan itineraries based on their own interests, pace, and budget. Second, the widespread adoption of digital tools has significantly lowered the threshold for independent travel; online guides, smart navigation, and one-stop booking platforms have made personalized trips more convenient. In addition, the preferences of younger generations and highly educated groups are further accelerating the market's move toward deeper experiences and cultural exploration.

Theme Travel has Emerged as a New Growth, with Young People Leading the Trend of "Niche Exploration"

Against the backdrop of rising demand for personalized travel and in-depth experiences, theme travel is gradually becoming a new growth driver in the cultural and tourism market.

Among theme travel options, cruise travel, with its advantage of integrating transportation, accommodation, and entertainment, has attracted a large number of tourists seeking in-depth leisure and a sense of exploration. According to Mastercard Insights, cruise spending has grown rapidly since Q3 2024. Ctrip data shows that the booking volume of cruise products this summer increased by over 60% year-on-year, while that of overseas long-haul cruise products surged by 120%—a clear sign of consumers' preference for cruise travel as a theme-based way to combine leisure, entertainment, and sightseeing.

The Number of Chinese Tourists in Antarctic Tourism



***Data source:** International Association of Antarctica Tour Operators (IAATO). The Antarctic season runs from October of the previous year to March of the following year.

Meanwhile, polar tourism, with its scarcity and adventurous nature, is drawing increasing attention and participation from Chinese tourists. In the latest season of Antarctic tourism, the number of Chinese visitors exceeded 10,000 for the first time, reaching 11,705 person-times, up 25% year-on-year. China has thus risen to become the world's second-largest source market for Antarctic tourism. This impressive performance not only highlights the growing influence of Chinese tourists in the global polar tourism market but also reflects their strong interest in high-end, unique destinations.

The rise of theme travel is underpinned by a profound shift in Chinese tourists' approach to travel—from "seeing the world" to "exploring the world." This trend is particularly pronounced among Generation Z and millennials, who are emerging as the main drivers behind the "niche exploration" boom.

Compared to traditional check-in-style tourism, young people of this generation are more inclined to choose destinations that offer cultural diversity, natural wonders, and personalized experiences—such as desert expeditions, plateau treks, and polar cruises—to satisfy their desire for uniqueness, immersion, and narrative depth.

Influenced by social media, travel is no longer just a personal experience but a shareable, expressive lifestyle. Young travelers seek to showcase their identities, broaden their horizons through travel, and gain emotional resonance and community recognition in the process of exploration.

This preference is reshaping the structure of the outbound tourism market, elevating theme travel from a marginal offering to a mainstream trend. It is also pushing travel service providers to continuously innovate in product design and content curation to better meet the expectations of this new generation of consumers.



Chapter 3

Chinese Mainland Inbound Tourism and Consumption Trends

3.1

Inbound Travelers' Profile and Origins

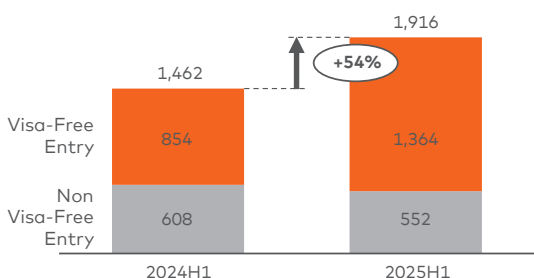
Major Cities' Inbound Tourism Saw Strong Recovery Trends in 2025, Driven by Expanded Visa-Free Policies

According to the National Immigration Administration of China, about 19.16 million foreign visitors entered China in the first half of 2025, including 13.64 million visa-free entries (71.2%), up 53.9% year-on-year. In the same period of 2024, visa-free entries totaled 8.54 million (58.4%).

Since H2 2024, China has continued to optimize visa-free policies by expanding eligibility, extending stay durations, and enhancing end-to-end services from arrival to departure. Improvements in payment, lodging, and transportation have further facilitated travel and economic exchange, boosting foreigners' willingness to visit.

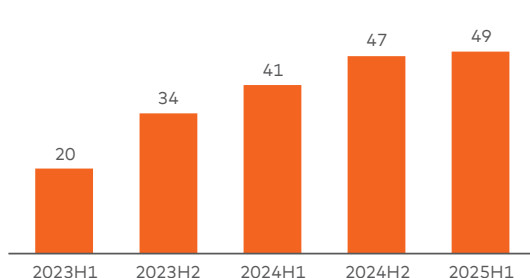
Key inbound destinations—Beijing, Shanghai, Guangzhou, and Shenzhen—show strong recovery momentum. In H1 2025, Beijing recorded 2.47 million inbound visitors (+48.8% YoY), including 2.04 million foreigners (+51.2%), while Shanghai saw 4.16 million visitors (+37.6%), with 3.12 million foreigners (+53.3%). Growth was mainly driven by short-haul travelers from South Korea, Thailand, and Japan. As visa-free access and travel convenience expand, China's diverse cultural and tourism offerings continue to strengthen the appeal of "China Travel."

Inbound Travel Volume / Visa-Free Entries (10,000 persons)



* **Data Source:** National Immigration Administration of the PRC

International Passenger Flights (10,000 flights)



* **Data Source:** National Bureau of statistics of PRC, National Immigration Administration of PRC

Based on booking data from Trip.com Group, the primary source markets for China's inbound tourism in H1 2025 were South Korea, Malaysia, Japan, the United States, Thailand, Singapore, Russia, and Canada. South Korea remained the top source market, while Malaysia, Japan, and

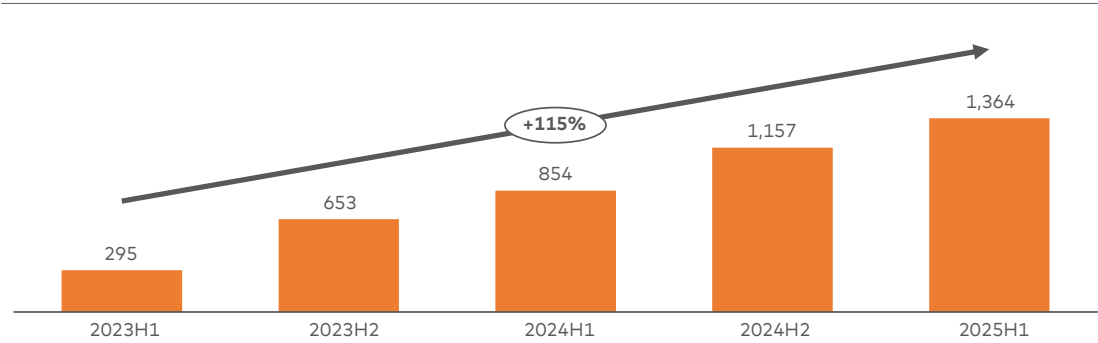
Thailand moved up one position in the rankings, and Russia entered the top eight for the first time. All of these markets are either visa-free entry or transit, highlighting the effectiveness of China's visa-free and entry facilitation policies in attracting foreign travelers.

Rankings and Trends of Inbound Foreign Visitors by Origin, Based on Estimated OTA Data, 2025H1

Origin	 South Korea	 Malaysia	 Japan	 United States	 Thailand	 Singapore	 Russia	 Canada
2025 H1 Ranking	1	2	3	4	5	6	7	8
Ranking Changes vs. 2024	 No Change	 Up 1	 Up 1	 Down 2	 Up 1	 Down 1	 New	 Down 1

* Data Source: Trip.com Group, aggregated and anonymized data

Visa-Free Inbound Travelers Trend (10,000 persons)



* Data Source: National Bureau of statistics of PRC, National Immigration Administration of PRC



China is actively refining its visa-free entry policies to further open up to the world. Measures include expanding the list of visa-free countries, extending permitted stays, and enhancing regional policies. As of June 30, 2025, China had established unilateral or mutual visa exemption agreements with 74 countries. The visa-free transit policy now covers 55 countries, allowing travelers with valid international travel documents and connecting tickets with confirmed seats to stay in China for up to 10 days. Detailed policy provisions are as follows:

Policy	Applicable Countries	Stay Period	Activity Areas	Entry Ports
Entry Policy Nationals of specific countries entering into China for the purpose of business, tourism, family or friends visits, exchange and transit for no more than 30 days without visa.	Unilateral visa-free entry-47 countries: Europe(32),Oceania(2), Asia(8), South America(5)Mutual visa-free entry-27 countries: Asia(10)*, Europe(5), Africa(2), Americas(6), Oceania(4)	30 Days	All	All open ports
Transit Policy Foreign nationals holding valid international travel documents and connecting tickets with confirmed seats, who intend to transit via China	55 Countries: Asia (7), Europe (40), Oceania (2), Americas (6)	240 Hours (10Days)	Permit to cross provincial boundaries within 24 eligible regions	60 Ports

***Source:** Ministry of Foreign Affairs of PRC, Chinese Visa Application Service Center, National Immigration Administration of PRC Includes visa-free group tours from Turkmenistan

Continuous Optimization and Upgrading of The Visa-Free Policy

• Significant Increase in Visa-Free Countries

From the second half of 2024 to the first half of 2025, China has signed mutual visa exemption agreements with four countries (Azerbaijan, Uzbekistan, Samoa, Solomon Islands) and introduced unilateral visa-free entry to 21 countries (Saudi Arabia, Oman, Kuwait, Bahrain, Brazil, Argentina, Chile, Peru, Uruguay, Bulgaria, Romania, Croatia, Montenegro, North Macedonia, Malta, Estonia, Latvia, Japan, New Zealand, Australia, Poland). China now has mutual visa exemption arrangements with 27 countries and offers unilateral visa-free entry to 48 countries, totaling 74 visa-free country origins.

• Extended Stay and Broadened Scope of Permitted Entry Purpose

Effective November 30, 2024, China extended the visa-free stay period for visitors of unilateral visa-free countries from 15 to 30 days and broadened the scope of permitted entry purpose to include exchange visits. This policy offers inbound travelers more time to explore China and increases flexibility for short-term business visits, family visits, and exchanges.

China Has Further Enhanced Visa-Free Policy: Extending Permitted Stay Period, Increasing Entry Ports, and Making Multi-City Travel More Convenient

- **Visa-Free Policy Now Covers 55 Countries.**

Effective June 12, 2025, Indonesia became eligible for China's 240-hour visa-free transit policy, expanding the list of eligible countries to 55—including 40 from Europe, 6 from the Americas, and 7 from Asia.

- **Extended Stay Period, Broader Scope of Entry Purposes and Activity Areas**

Effective December 17, 2024, the stay period for visa-free transit foreigners within China was extended from the original 72 hours and 144 hours to 240 hours (10 days). Additionally, 21 new ports have been designated for visa-free entry and exit, and travelers are now permitted to cross provincial boundaries within eligible regions. Previously, the visa-free transit stay duration was 72 hours (in 3 cities) or 144 hours (in 20 cities), with restrictions on cross-regional travel.

As China continues to refine its visa-free policies, foreign visitors are staying longer, and the demand for deeper, more immersive travel experiences in China.



3.2

Product Booking Patterns Among Inbound Travelers

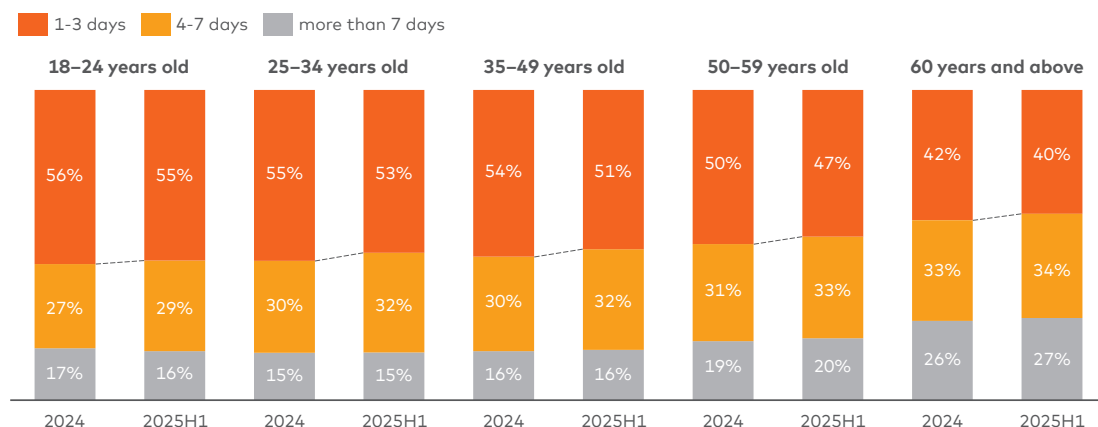
Inbound Travelers are Staying Longer, With a Marked Preference for In-depth Travel Among Middle-aged and Senior Visitors.

With the successive introduction of a series of policies and measures that facilitate foreigners coming to China, the enthusiasm of foreigners to visit China has significantly increased. All regions across the country have seen a rapid growth in the number of inbound travelers, demonstrating diverse preferences for inbound tourism.

As highlighted in last year's report, since 2023, the share of travelers opting for extended stays of over a week has risen significantly—a trend that persists in the first half of 2025. With visa-free policies continuing to relax stay restrictions, travelers in 2025 are spending more time in China compared to 2024, while short trips of just 1–3 days are steadily declining. More visitors are moving away from “lightning-fast” itineraries and instead seeking immersive experiences that showcase China's distinctive appeal.

Age plays a key role in this shift: the older the traveler, the longer the stay. In early 2025, 29% of visitors aged 18–24 stayed for 4–7 days, and 16% stayed beyond a week. Among those aged 50–59 and 60+, the figures were even higher—33% and 34% for 4–7 days, and 20% and 27% for stays exceeding a week. Compared to younger travelers, middle-aged and senior visitors show a stronger inclination toward in-depth travel.

Length of Stay for Inbound Travelers by Age Group



* Data Source: Trip.com Group, aggregated and anonymized data

"Event Tourism" Drives the Boom in Inbound Travel

The 9th Asian Winter Games held in Harbin in January 2025 and the 12th World Games hosted in Chengdu in August not only attracted global attention as major international sporting events, but their ongoing "spillover effect" also fueled a surge in "event-driven inbound tourism."

Ctrip data shows that during the World Games, inbound travel to Chengdu jumped 31% year-on-year, with Kuanzhai Alley, Taikoo Li, and Chunxi Road emerging as top destinations. From July 1 to August 15, Thailand, Vietnam, and South Korea led the inbound traveler rankings, while arrivals from Germany, Spain, and Tanzania grew severalfold. To capitalize on this momentum, Chengdu introduced an innovative "One Ticket, Multiple Experiences" model, enabling World Games ticket holders to enjoy discounts at major attractions, 56 hotels, and hundreds of restaurants—seamlessly blending sports and tourism.

Harbin saw a similar surge during the Asian Winter Games. According to Xinhua News Agency, inbound travel orders soared 157% year-on-year, with significant increases in visitors from Russia, the United States, and Hungary—underscoring the strong draw of international sporting events.

"Cultural Experiences" Are the New Travel Trend

China's rich and inclusive civilization, with its profound cultural heritage, is becoming a major draw for global travelers. Research by the China Tourism Academy and interviews for this report reveal that experiencing Chinese culture is increasingly the primary motivation for foreign visitors.

From living traditions of millennia-old intangible heritage to innovative cultural spaces blending past and present, inbound travelers' interests are more diverse than ever. Some seek the elegance of Jiangnan in Suzhou's classical gardens or craft ceramics in Jingdezhen; others venture to Yunnan villages to learn the Dong ethnic group's Grand Song or immerse themselves in Tang Dynasty life at Xi'an's "Chang'an Twelve Hours" experience. This growing appetite for cultural depth is driving a shift from "checklist sightseeing" to "immersive experiences," making China's cultural richness a key engine of inbound tourism growth.

Knowledge-based tourism is also becoming a hallmark of historical tours in ancient capitals. Ctrip data shows that demand for professional guided interpretation surged 95-fold in 2024, with multilingual guided tours at the Beijing Palace Museum, the Mausoleum of the First Qin Emperor (Terracotta Warriors), and the Badaling Great Wall seeing exponential booking growth.

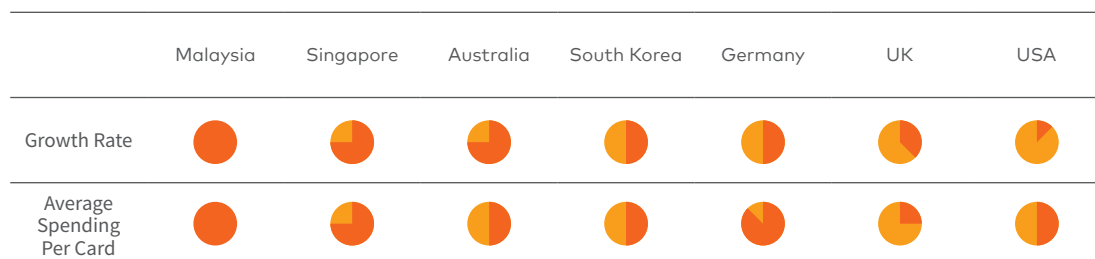
3.3

Analysis of Consumption Patterns and Payment Behaviors Among Inbound Travelers

Top inbound spending source markets are Malaysia, Singapore, and Australia

Between Q3 2024 and Q2 2025, Malaysia, Singapore, Australia, South Korea, Germany, the UK, and the US emerged as the top source markets for inbound spending. Malaysia, Australia, and Singapore posted standout year-on-year growth rates—each exceeding 50%—signaling a sharp rise in consumer interest from these markets. In terms of average card spend, Malaysia, Germany, and Singapore ranked among the highest across major source markets.

Growth and Average Card Spend of Leading Source Markets for Inbound Consumption



*Data Source: Mastercard Insights, Q3 2024 to Q2 2025 , aggregated and anonymized data

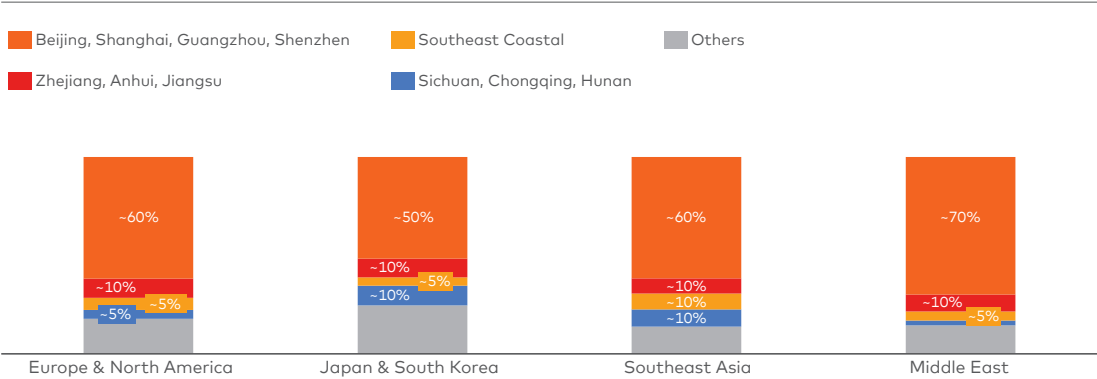


Inbound Spending Remains Centered on First-tier Cities

Inbound traveler spending remains heavily focused on China's first-tier and emerging first-tier cities. Between July 2024 and June 2025, the top ten cities by total spending were Shanghai, Guangzhou, Beijing, Shenzhen, Chengdu, Hangzhou, Zhangjiajie, Suzhou, Xiamen, and Nanjing. Chengdu climbed one spot from last year and posted the fastest transaction growth among leading cities, underscoring its rising appeal as a western hub. Xiamen led in growth of average card spend, signaling strong potential for premium consumption.

Spending preferences vary significantly by traveler origin. Visitors from Japan, South Korea, and Southeast Asia are more likely than those from Europe and the U.S. to spend in regions such as Sichuan, Chongqing, and Hunan. In terms of transaction value, U.S. and U.K. cardholders favor Beijing, where their spending surpasses Guangzhou. For South Korean travelers, the top three cities by spending are Zhangjiajie, Shanghai, and Yanji—with average card spend in Zhangjiajie even exceeding that in Shanghai.

Distribution of Inbound Travelers by Source Market and Visits to Domestic Destinations



***Data Source:** Mastercard Insights, Q3 2024 to Q2 2025 , aggregated and anonymized data

A batch of High-growth Potential Regions Emerges Simultaneously

Several new destinations are seeing remarkable growth. Yanbian Prefecture, Leshan, Linzhou, and Huangshan—cities that were absent from the top 100 by transaction volume last year—made the list during this report's observation period, signaling a shift among inbound travelers toward high-quality, lesser-known cities.

Consider Linzhou in Henan: home to the Taihang Grand Canyon Scenic Area, this county-level city has experienced a surge in South Korean visitors since spring 2024. In April, a delegation from Anyang, South Korea, visited Linzhou, and from that month onward, Korean travel agencies began operating four weekly charter flights to sites such as the Yin Ruins in Anyang and the Taihang Grand Canyon. Flight frequency is expected to rise to seven per week, totaling over 100 flights annually—continuously energizing the local inbound tourism market. This trend

underscores the international potential of niche destinations and the growth opportunities created through coordinated policies and resource integration.

Shopping, Dining, and Health Spending See Strong Growth

Inbound travelers' spending patterns are shifting toward offline, experiential, and everyday scenarios—underscoring China's progress in improving card acceptance and payment convenience.

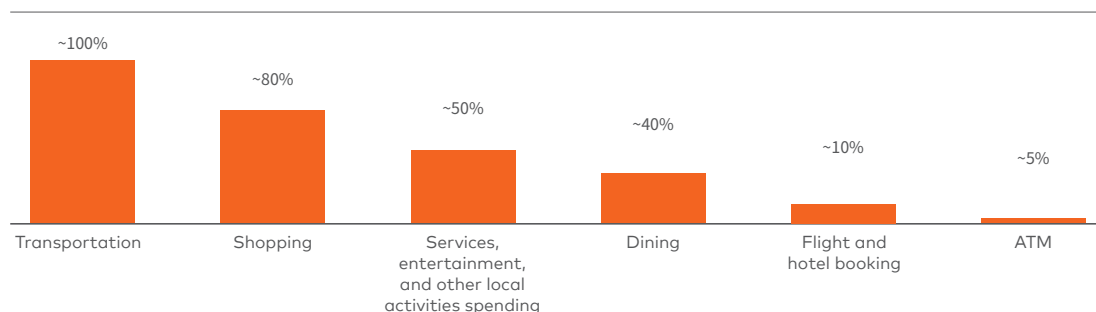
Shopping stands out with an around 8% year-on-year increase in share and a nearly 90% rise in transaction value. This surge is driven primarily by a sharp increase in the number of cards used, while average spend per card remains stable—signaling a broader consumer base rather than higher individual outlays. The trend reflects ongoing enhancements to China's card acceptance environment: by September 2024, coverage among key merchants reached 99%. Transactions for "Foreign Card On File" grew significantly. Tax refund efficiency has also improved significantly; since May 2025, the State Taxation Administration has rolled out "instant refund upon purchase," cutting refund times dramatically and elevating the shopping experience.

Transportation payments are booming, with transaction value growing strongly and card usage surging—thanks to greater ease of foreign card payments in transit systems. Metro networks in Beijing, Shanghai, Chengdu and Guangzhou now support direct foreign card tap-in, with other cities actively upgrading systems.

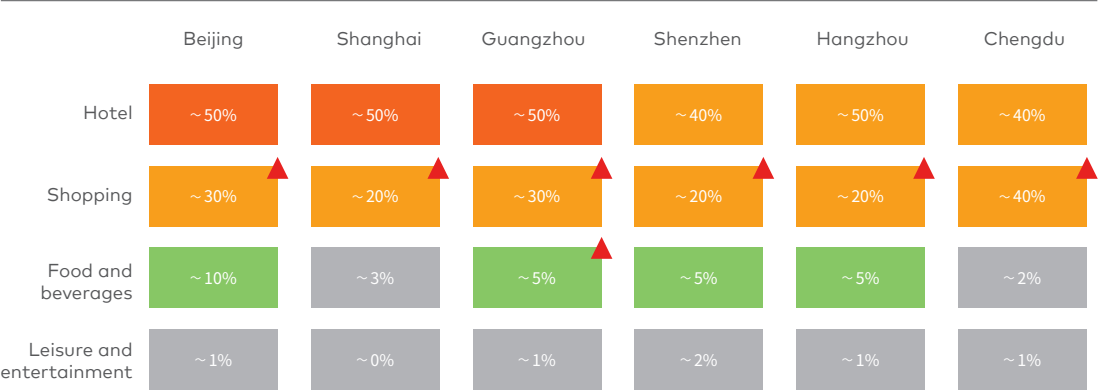
City-level spending patterns reveal distinct preferences. In Chengdu, shopping accounts for roughly 40% of inbound spending—higher than other major destinations—highlighting its retail appeal. Shanghai is dominated by hotel and shopping spend, while Beijing leads in dining, with food accounting for about 10% of inbound consumption.

Notably, shopping spend is rising across all leading cities, reflecting sustained interest in retail and the broad impact of improved acceptance and tax refund processes. Guangzhou also shows growth in dining spend, pointing to heightened interest in local culinary experiences—supported by better payment experiences in high-frequency scenarios.

Key Categories of Inbound Spending and Year-on-Year Growth



Proportion of Offline Card Transactions by City and Sector

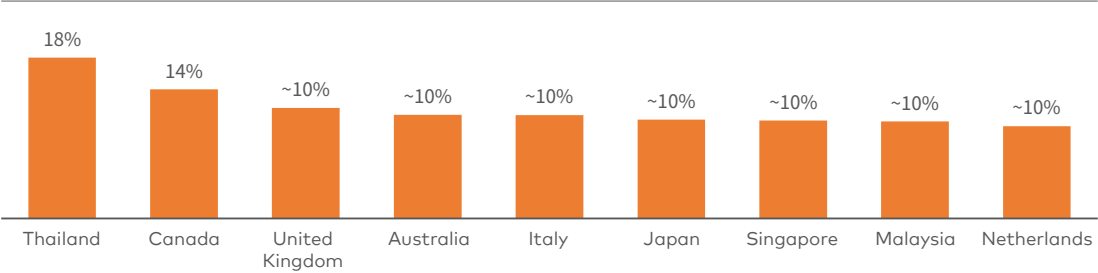


Metro Tap-and-Go Payments Gain Popularity among Inbound Travelers

Since early 2025, the number of inbound travelers using foreign bank cards for tap-and-go metro access has surged, with Q2 usage up nearly 60% compared to Q1—underscoring growing acceptance of this payment option.

Most users come from the UK, Singapore, Germany, and the US, while Thailand stands out with a penetration rate close to 20%. In practical terms, one in five travelers from Thailand in Beijing opts for tap-and-go metro payments, highlighting the strong appeal of this fast, convenient solution for high-frequency urban transport.

Top 10 Regions for Tap-and-Go Card Usage in Beijing Metro, H1 2025



Data Source: Mastercard Insights, H1 2025 , aggregated and anonymized data

Tap-and-go card payments are proving especially convenient in metro systems. Travelers no longer need to download local apps or create complex accounts—simply tapping an overseas bank card at the gate completes the payment, dramatically lowering barriers to use. This approach not only speeds up entry but also enhances the overall travel experience.

Notably, tap-card penetration rates in countries such as Canada, Italy, and Singapore rose significantly in Q2, with some markets posting gains of over 3–4%. This trend reflects ongoing efforts to localize payment experiences, including streamlined tap-card processes, improved

transaction success rates, and exclusive offers launched in partnership with global card networks—all of which are driving changes in user behavior.

Tap-and-go is rapidly becoming a preferred payment method for inbound travelers using urban transit, marking a step forward in the internationalization of China's public transport services. Beyond Beijing and Shanghai, other major cities—such as Chengdu, which introduced metro tap-card support on July 28 and Guangzhou, which introduced metro tap-card support on October 12—are following suit. Global card networks like Mastercard are also promoting this payment scenario aggressively, offering rebates and cashback incentives.

E-wallet Transactions Surge among Inbound Travelers

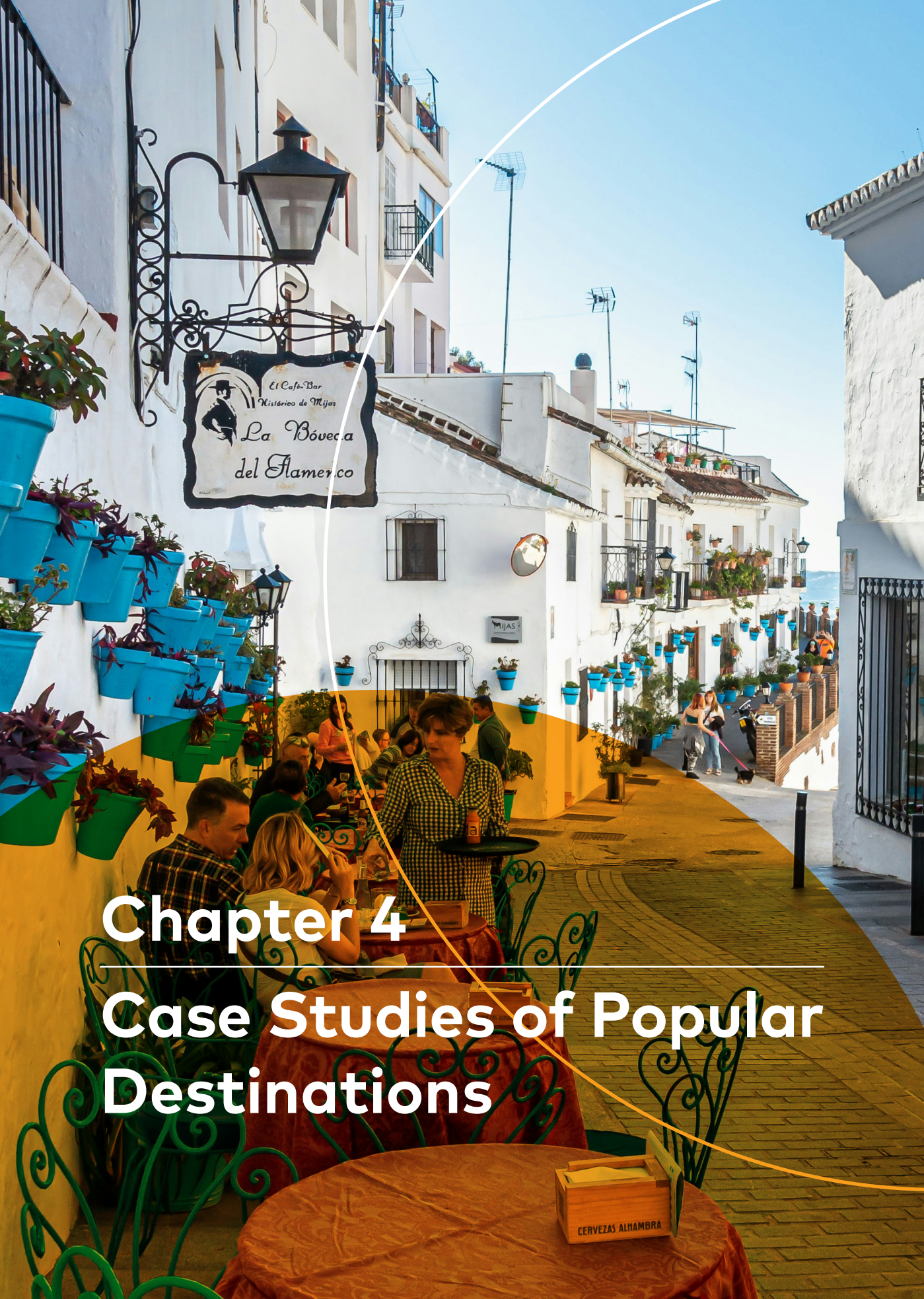
Linking overseas bank cards to e-wallets has emerged as a key driver of payment convenience for inbound visitors, with the past year seeing rapid expansion. Both transaction volumes and user numbers for online e-wallet payments have grown sharply, reflecting higher frequency and broader integration into daily life scenarios.

Usage is climbing across markets, with Southeast Asia leading the way—several countries posted growth well above the average. Singapore, South Korea, and the U.S. are now the top source markets for e-wallet payments.

Penetration rates vary widely: Thailand and Singapore show strong adoption, while some European countries remain in early stages. Notably, the U.K., Australia, and Thailand have all recorded significant gains, signaling a steady shift in user habits.

Overall, e-wallet payments are becoming a preferred option for inbound travelers in areas such as transport and lifestyle services, reinforcing China's progress toward a more internationalized and convenient payment ecosystem.





Chapter 4

Case Studies of Popular Destinations

CERVEZAS ALHAMBRA

4.1

Popular Outbound Tourism Destinations

From Sightseeing to Immersive Experiences: How Chinese Tourists Are Redefining Travel in Spain

Europe has long been one of the most favored long-haul destinations for Chinese travelers, and Spain—one of Europe's traditional tourism powerhouses—has performed particularly well in attracting Chinese visitors. From the rapid growth in visitor numbers to the notable shift in spending power and travel styles, Spain is demonstrating a distinct and dynamic recovery trajectory.



1. Strong Recovery in Visitor Volume and Spending Power

The year 2024 marked a turning point for Spain's tourism rebound. According to data from Turespaña, a total of 648k Chinese tourists visited Spain during the year—an impressive 67% year-on-year increase. The momentum has continued into 2025: data from Trip.com Group shows that bookings for Spain during the Chinese New Year surged by 82%, far outpacing Italy (56%) and France (50%). This makes Spain one of the fastest-growing European destinations among Chinese travelers.

Beyond the increase in arrivals, Chinese visitors' spending power in Spain has also shown steady growth. Insights from Mastercard³ reveal that between July 2024 and June 2025, the number of Chinese cardholders spending in Spain rose by 33% year-on-year, surpassing growth rates in France (+19%), Switzerland (+18%), and Germany (+17%), underscoring Spain's growing competitiveness in catering to Chinese travelers' demand for high-quality, experience-oriented journeys.

2. Emerging Destination Trends

a) Cultural Immersion Travel

Affluent post-70s travelers have become a key driving force behind cultural immersion travel to Spain. This demographic shows

a clear preference for comfortable and intellectually enriching itineraries, often traveling with family members and seeking out less-commercialized historical towns and heritage sites.

Cities such as Seville and Toledo, rich in historic architecture, artworks, and deep cultural heritage, are attracting Chinese travelers eager to experience Spain's cultural legacy in an immersive, narrative-driven way.

b) Growing Demand for Local Lifestyle Experiences

An increasing number of Chinese travelers are shifting from "seeing the sights" to "living like a local." While major cities such as Madrid and Barcelona remain popular for shopping and iconic landmarks, interest is rapidly expanding toward nature, gastronomy, and niche cultural experience. Travelers are actively participating in traditional local festivals, such as Seville's Holy Week processions and April Fair, wandering through historic neighborhoods, and exploring local markets to taste authentic street food. This reflects a broader mindset shift: Chinese travelers are seeking cultural immersion, emotional connection, and day-to-day local life, rather than merely consuming scenic highlights.



c) Rise of Purpose-Driven Thematic Travel

Travel with a clear thematic purpose is on the rise. Spain's rich entertainment offerings and world-class sporting events are drawing a growing number of Chinese travelers specifically for such experiences. For example, the Primavera Sound Festival in Barcelona is emerging as a major attraction — its June 2025 edition welcomed 293k attendees¹, setting a new single-week record. Similarly, as a global football powerhouse, Spain draws loyal Chinese fans to major competitions such as La Liga and the UEFA Champions League— blending sports pilgrimage with travel. These purpose-driven travel formats are broadening Spain's tourism product portfolio and further enhancing its appeal among diverse Chinese visitor segments.

Natural Landscapes, Culinary Appeal, and Travel Convenience Position Malaysia as a Rising High-Value Destination for Chinese Travelers

In 2024, Chinese arrivals to Malaysia surged by over 120% year-on-year. According to Mastercard insights, spending by Chinese cardholders in Malaysia grew 10% in the first half of 2025, exceeding that of Thailand, Singapore, and Vietnam. This growth has been primarily driven by:

- **Mutual visa-free policy:** Effective Dec 2023, China implemented a unilateral visa-free policy for Malaysian passport holders, while Malaysia simultaneously introduced visa-free entry of up to 30 days for Chinese citizens —lowering travel barriers.
- **Rise of "red-eye flights"** tailored to millennial and Gen Z travelers pursuing



micro-getaways — for example, AirAsia's Beijing–Kota Kinabalu route, departing late Friday night and returning Sunday evening for under RMB 2,000 round-trip².

Yet beyond the convenience, Malaysia's rapid ascent among Chinese travelers is fundamentally driven by its unique "travel value triad" — natural diversity, culinary richness, and Chinese-friendly experience.

1. Natural Landscapes: Island Paradises and Tropical Rainforests

As a tropical nation, Malaysia's most iconic travel offering lies in its coastline and island ecosystems — stretching over 4,000 km and comprising more than 878 islands.

Semporna's Tun Sakaran Marine Park is renowned for its "glass-sea" clarity — a premier destination for diving enthusiasts. Kota Kinabalu is globally acclaimed for its "world-class sunsets."

Beyond the islands, Malaysia's tropical rainforests are equally compelling. Approximately 58% of national landmass is forested³. Mount Kinabalu, rising 4,095 meters, is not only the fifth-highest peak in Southeast Asia, but also a UNESCO World Natural Heritage Site — appealing to eco-tourists and soft-adventure travelers alike.

2. A Culinary Powerhouse: Where Diversity Defines Taste

Malaysia's multicultural heritage has shaped an extraordinarily rich and authentic food culture — where hawker centres and kopitiam (traditional coffee shops) act as vibrant culinary hubs. A fragrant plate of char kway teow typically costs 10–15 MYR (≈ RMB 15–23), offering exceptional value. As the world's second-largest durian producer (with an annual output of 500k–700k tons), Malaysia is particularly renowned for premium varieties such as Musang King, drawing in dedicated food travelers. The durian harvest seasons (June–August and December–January) are widely viewed as "golden months for flavor





hunters”, further boosting its attractiveness as a gourmet travel destination.

3. Travel Convenience: A Chinese-Language-Friendly and Value-Driven Experience

One of Malaysia’s defining strengths as an outbound destination is its linguistic accessibility for Chinese tourists. With ethnic Chinese accounting for 22.4% of the national population² and exceeding 30–50% in key cities such as Penang and Kuala Lumpur, Mandarin and Cantonese are widely spoken. Chinese signage is common across airports, attractions, and commercial districts, allowing Chinese tourists to navigate with ease — often without language barriers at all.

Additionally, Malaysia delivers strong value-for-money. A five-star hotel with premium skyline views (e.g., facing the Petronas Twin Towers) that might cost RMB 2,000 per

night in first-tier Chinese cities can often be booked in Malaysia for around RMB 1,000. This combination of ease, comfort, cultural familiarity, and affordability is positioning Malaysia as a rising benchmark for high-experience, high-efficiency travel in the Asia-Pacific region.

From K-pop to Aesthetic Experiences: How South Korea Is Reinventing Short-Haul Travel for China’s Young Generation

In recent years, South Korea has rapidly emerged as one of the most popular short-haul outbound destinations among young Chinese travelers. Compared with other countries, Korea’s combination of low cost and high experiential value has created a strong competitive edge. The global rise of K-pop culture has further fueled a wave of “idol-driven travel,” while Korea’s well-developed beauty and aesthetics industry continues to attract travelers seeking personalized and style-focused experiences. Together, these trends are redefining South Korea as a multi-dimensional, youth-oriented destination for the Chinese outbound market.

1. K-pop Culture Becomes a Core Travel Motivation

Among young Chinese travelers, K-pop concert tourism has quickly become one of the main reasons to visit Korea. On social media, fan communities and accounts dedicated to tracking performance schedules are gaining millions of followers, driving a new hybrid model of “idol pursuit + tourism”. Many visitors now plan their entire itineraries around attending concerts—securing tickets months in advance, booking accommodation near venues, and structuring their travel

around key events. According to Mastercard Insights, between June 2024 and July 2025, spending by Chinese tourists on concert tickets in Korea grew over fifty-fold growth year-on-year. The share of online ticket purchases also rose significantly, indicating that most visitors finalize their performance schedules before departure, reflecting mature, purpose-driven travel planning and a high degree of itinerary customization.

2. Korean Aesthetics: A New Driver of Beauty-Led Tourism

Beyond pop culture, Korean aesthetic experiences have become a key motivation for young Chinese travelers. On social media platforms, the theme of “transformative beauty journeys”—covering skincare, hairstyling, makeup, and photography—has become a defining narrative of travel to Korea. Data from Mastercard shows that between June 2024 and June 2025, Chinese tourist spending on beauty and haircare services in Korea increased by 20% year-on-year, characterized by both high-value transactions and broad participation. This indicates that the once-niche combination of “travel + cosmetic enhancement” is now entering the mainstream.

Meanwhile, services marketed as “idol-style makeup and photo packages” have surged in popularity, with spending up more than 80% and the number of active cards doubling year-on-year. These trends highlight young travelers’ strong identification with Korean aesthetics—from studio photoshoots and professional makeovers to local styling sessions. In short, Korean aesthetics are evolving into a high-frequency, high-value consumption scenario within leisure travel, strengthening South Korea’s position as a trendsetting destination for the next generation of Chinese tourists.



*Data Source:

1. Turespaña;
2. Flight pricing based on August 2025 market data.;
3. Ministry of Plantation and Commodities, Malaysia

4.2

Popular Inbound Tourism Destinations

Sports, Pandas, and Esports: Three Emerging Growth Engines Behind Chengdu's Tourism Surge

According to data from platform Trip.com¹, Chengdu ranked among the top domestic destinations during China's 2024 National Day holiday, welcoming 23.8 million visitors (+5.1% YoY) and generating RMB 23 billion in tourism revenue (+8.9% YoY), signaling a rapid rise in both domestic and international appeal.

This surge resulted from three tourism drivers: world-class sporting events, the global panda IP, and the rise of esports.

1. World Games: Sporting Events as Tourism Accelerators

Chengdu successfully hosted the 12th World



Games in 2025, drawing global attention. Official data shows that during the event, the city received 69k inbound visitors, a 72.5% year-on-year increase, with inbound arrivals from Germany increasing by 4.2 times, Spain by 3.8 times, and Tanzania by 3.1 times.¹ The core commercial districts such as Chunxi Road becoming major hotspots. Nighttime tourism activities — including Jinjiang River night cruises and experiences in creative cultural zones such as Eastern Suburb Memory — were particularly popular among international visitors².

2. Pandas: From Adorable Symbol to Global Cultural Super IP

As the native habitat of giant pandas, Sichuan — and particularly Chengdu — has long been recognized as the "true home" of this national treasure. Today, pandas have become Chengdu's most influential city-level IP assets. Since the start of the summer travel season, visitor volume to the Chengdu Research Base of Giant Panda Breeding has surged by over 70%, with daily attendance exceeding 40,000 visitors³.

Notably, visitor expectations have shifted from simple sightseeing to participatory experiences — such as making panda food, cleaning enclosures, and assisting in conservation tasks. The panda "Hua Hua" has become a viral cultural phenomenon. Her related hashtag on Tiktok has surpassed 10 billion views, with overseas platforms recording millions of additional views. A limited-edition release of 16,800 Hua Hua



plush toys sold out within just 30 seconds, reflecting extraordinary market enthusiasm.

Amid the surge of digital dissemination, the panda IP has expanded beyond offline tourism and entered urban digital space. Its 3D "naked-eye" display in Chengdu's prime commercial districts now attracts over 100,000 on-site viewers per day, while the viral "Wall-Breaking Panda" animation — later reposted by China's Ministry of Foreign Affairs — triggered global online discussion. Together, these developments mark the panda's shift from an adorable local mascot to a globally recognizable cultural super IP.

3. Esports: From Event Host City to Cultural Lifestyle Originator

In 2024, Chengdu was officially listed among the world's most influential esports cities⁴, reflecting its rapid ascension within the global digital entertainment landscape. According to Southern Metropolis Daily, Chengdu now accounts for 15.3% of all offline esports¹ events held nationwide — the highest share among Chinese cities.

Chengdu's investments in esports have directly converted into tourism appeal. Leading professional esports clubs such as AG Super Play and OMG have established their home arenas in Chengdu. Over 70% of AG's 2024 home game attendees were from outside Sichuan, generating more than RMB

150 million direct consumption⁵.

Looking ahead, Chengdu is set to host the 2025 League of Legends World Championship, one of the world's most influential esports tournaments. Excitement within the global fan community is already evident, with many preparing to visit Chengdu in person — signaling another major surge in esports-driven inbound tourism. League of Legends collaborated with Chengdu Culture & Tourism Group to launch a themed cultural installation at Kuanzhai Alley, transforming traditional Sichuan-style courtyards into game-inspired interactive spaces. Esports is now being organically embedded into Chengdu's urban culture.

Football Fever Ignites Cultural Tourism: How Jiangsu Is Turning Grassroots Sports into a Citywide Consumption Engine

From May to July 2025, over 5 million passengers have traveled to Jiangsu via domestic flights. The explosion of the Jiangsu City Football League ("Su-Chao") this summer has become a major catalyst, transforming local football culture into a full-scale tourism and consumption phenomenon. "Travel Jiangsu with the Su-Chao" has rapidly emerged as one of the most popular summer travel trends, driving significant spikes in flight bookings: Nanjing, Wuxi, Changzhou,



and Nantong — all Su-Chao host cities — saw week-on-week air ticket bookings increase by over 10% during the 2025 summer season.

Across the first six rounds of the Su-Chao, five major consumption sectors — tourism, transportation, dining, lodging, and sports — generated a combined service revenue of nearly RMB 38 billion, demonstrating the power of grassroots sports as a driver of urban economic vitality.

1. Record-Breaking Attendance: A Fully Mobilized Public Sporting Culture

Fan enthusiasm has reached unprecedented levels — offline tickets often sell out instantly. As of Round 8 of the Su-Chao, the league has attracted over 1.1 million total spectators, with average attendance surging from 7,745 per match in Round 1 to over 30,000 per match by Round 8. In Nanjing, attendance peaked at 60,396 spectators in Round 6⁶, setting a new national record for a single amateur football match. Remarkably, the community tournament — composed primarily of amateur players — is generating attention levels comparable to professional leagues, with more than one-third of attendees traveling from outside Jiangsu.

2. Viral Internet Culture and City Pride Take Center Stage

The Su-Chao has rapidly become a social media phenomenon, driven by a wave of organic memes and city-level rivalry narratives. Phrases such as "Friendship is fourteenth, victory is first," "Battle of the Southern Brothers," and "Calligraphy Stroke Showdown of Changzhou" have spread widely online, symbolizing deep-rooted cultural identity and inter-city pride across Jiangsu's 13 municipalities. As of June 21, hashtags such as have surpassed 11 billion total views across short-video platforms⁷ —

reflecting extraordinary digital traction and nationwide visibility.

3. From Sports Event to Cultural-Tourism Engine

Su-Chao ignites citywide consumption and emotional tourism conversion. By the end of July 2025, Jiangsu had launched over 1,800 tourism and cultural activities and rolled out more than 100 supporting public-benefit initiatives centered around the Su-Chao league — including the distribution of over RMB 140 million in consumption vouchers⁸

. Cities have shown exceptionally strong commitment and hospitality. Multiple host cities introduced over 10 customized rail services, providing direct, one-stop travel for nearly 20,000 fans. Cities set up large-scale public viewing zones. In Nanjing alone, 87 live-viewing spots were activated in a single weekend, attracting over 7 million visits. Local cultural gifts, tourism discounts, and even free scenic-area access are provided, shaping an urban festival-like atmosphere around the matches. Many visiting fans remarked: "I came to watch a match — and fell in love with the city."

***Data Source:**

1. PR Newswire;
2. Sichuan Provincial People's Government Official Website;
3. Chengdu Release (Official Municipal Media Platform);
4. 2024 Global Esports Industry Development Report;
5. Pioneer Chengdu
6. General Administration of Sport of China;
7. Nanjing Municipal People's Government Official Website;
8. People's Daily Online

A vibrant market scene, likely in a North African or Middle Eastern setting. The foreground is dominated by numerous hanging lanterns of various sizes, featuring intricate metalwork and perforated designs. Some are large and spherical, while others are smaller and more ornate. The lanterns are suspended from above, creating a canopy effect. In the background, a narrow market street is visible, lined with colorful textiles and fabrics hanging from the walls. People are seen walking through the market, and a motorcycle is parked on the left. The overall atmosphere is warm and bustling.

Chapter 5

Emerging Travel Trends

5.1

Trend 1: Emotions Now at the Heart of Travel Motivation

Emotionally driven travel is on the rise, with "Healing" becoming a defining theme

Emotionally driven travel is on the rise, as people seek relief from daily stress and pursue inner peace. For many working professionals, short weekend getaways abroad have become a form of "ritual escape," with the concept of "weekend escape plans" gaining popularity across social media. Immersive experiences — like snorkeling in Phu Quoc Island (Vietnam), chasing sunsets in Kota Kinabalu (Malaysia), or strolling with deer in Nara Park (Japan) — are redefining travel as emotional healing. The demand for "healing travel" is on the rise. Since 2024, searches for "healing" on major travel platforms have surged by 280% YoY. Market research also reveals that 30% of travelers now prioritize "positive emotional value" as their top travel objective. Wellness activities such as hot springs, meditation, and massages are increasingly integrated into itineraries, transforming travel into a journey of emotional renewal. By engaging in these immersive and restorative experiences, travelers not only rejuvenate physically but also find emotional solace and joy. This shift toward emotionally-driven travel reflects a growing desire for mental well-being and is steering tourism toward deeper, more diverse experiences. In response, travel companies must enhance their service offerings with specialized and personalized healing experiences. Tailored wellness products for working professionals, seniors, and even younger travelers are emerging as new growth opportunities. Overall, healing tourism not only expands the service boundaries of travel companies but also enhances customer stickiness and creates greater brand premium potential.





So Close, So Beautiful — Spend the Weekend in Hebei

What started as a simple marketing slogan by Hebei Provincial Department of Culture and Tourism has unexpectedly gone viral online. Across domestic and international destinations, netizens are creatively showcasing homemade banners, humorously suggesting their slogans be “launched to the moon” or “featured in international headlines”. The wave of creative user-generated content has propelled Hebei’s tourism campaign into the spotlight in a fun and relatable way. Beyond the catchy tagline, Hebei has tapped into a growing demand for “short trips, affordability, weekend getaways, and emotional escape,” making it a top choice for young travelers from the Beijing-Tianjin-Hebei region. Without the hassle of long-distance travel, people can enjoy a rejuvenating break: a three-hour trip from Beijing’s bustling city center leads to a stroll along Beidaihe’s beaches, a hike through Yesanpo in Baoding, a relaxing soak in Chicheng’s hot springs,

an immersive performance of A Dream of Red Mansions, or the energy of a rock music festival in Shijiazhuang.

Hebei’s “micro-vacation” and “slow living” concepts perfectly match the fragmented schedules of urban professionals, offering a sense of ritual and relaxation without requiring extended leave.

According to official data, in the first half of 2025, residents from Beijing and Tianjin accounted for 39.3% of Hebei’s out-of-province tourism spending, turning the slogan “Weekend in Hebei” into a practical choice. Local tourism companies have responded by launching “weekend healing” products — such as forest hikes, hot spring wellness, and countryside homestays — that cater to urban travelers seeking quick emotional recovery. These offerings not only meet short-term wellness needs but also stimulate growth across supporting sectors like lodging, transportation, and cultural retail.

*Source:

Hebei Provincial Department of Culture and Tourism, Mastercard Insights, Desktop research

5.2

Trend 2: Local Culture Sparks Travel Inspiration

From Sightseeing to Discovery: Local Culture is Gaining Fresh Momentum

Outbound travel is increasingly shaped by "crowd avoidance" and "reverse tourism," as travelers shift from traditional hotspots to culturally rich niche destinations. Experiences once considered offbeat — like penguin watching in Antarctica, Africa's great migration, desert camping in the Middle East, or exploring Eastern European towns — are gaining traction through social media. This shift is fueled by a "hotspot incubation mechanism," where viral posts spark emotional resonance, attract local government support, gain amplification from celebrities or KOLs, and receive platform-wide promotion — accelerating the rise of short-cycle niche hits. Simultaneously, China's inbound tourism is undergoing structural change, driven by relaxed visa policies, mobile payment adoption, and aspirational trends on overseas social media. Travelers are expanding beyond Tier 1 cities to smaller urban centers and scenic rural villages, energizing mountain and countryside tourism. To meet this demand, domestic travel firms are leveraging local assets — such as intangible heritage, folk traditions, crafts, and cuisine — to create immersive itineraries. These include ancient village study tours, ethnic festivals, and hands-on cultural experiences. The rise of local culture is enhancing tourism differentiation, revitalizing communities, and paving the way for sustainable industry growth.

International Case Sharing: Culinary Connections Put Tangier, Morocco on the Map

Global tourism is shifting from "checklist sightseeing" to immersive cultural experiences. Travelers increasingly seek emotional connection through local lifestyles and authentic engagement — both abroad and within China. Tangier, Morocco exemplifies this trend. In 2025, the Chinese reality show *Chinese Restaurant* was filmed in Tangier, blending Chinese cuisine with Moroccan culture through celebrity-led market visits and live cooking.

Post-broadcast, stars like Huang Xiaoming

and Shen Yue amplified the buzz on social media, driving a surge in Tangier-related searches and travel interest. With its Mediterranean architecture, European-style





streets, and vibrant port markets, Tangier offers a unique cultural atmosphere. The Moroccan Tourism Board partnered with the show's producers to promote Tangier as a destination, positioning food as a cultural bridge. Local chefs and artisans collaborated with Chinese businesses, enriching visitor experiences. Tangier quickly became a top choice for Chinese travelers — not only for its fresh appeal beyond traditional European routes, but also for its culinary fusion that eased cultural unfamiliarity. This case highlights how cultural immersion and emotional resonance are becoming key drivers of global tourism appeal.

Domestic Case Sharing: Exploring Shanxi with Wukong

Shanxi has seen a surge in tourism following the success of Black Myth: Wukong, China's first AAA game. Of the game's 36 featured locations, 27 are in Shanxi, including iconic sites like the Hanging Temple and Xiaoxitian. Datong, home to landmarks such as the Yungang Grottoes, has become a hotspot for fans eager to explore the real-world Wukong universe. To harness this momentum, the Shanxi Provincial Department of Culture

and Tourism launched themed content and itineraries — such as "Travel Shanxi with Wukong" and "Journey to the West" routes — highlighting the region's rich architectural and cultural heritage. Datong's tourism authorities introduced interactive Wukong-themed travel routes and cultural products like figurines and fridge magnets, creating a full cultural tourism value chain. Fueled by the game's widespread traction, visitor numbers at Huayan Temple rose over 50% YoY.

Globally, Black Myth: Wukong has drawn attention for its stunning visuals and reinterpretation of the Monkey King legend, sparking inbound travel interest. Online platforms now offer themed packages like "Check In at Six Iconic Game Locations," popular among international travelers seeking immersive cultural experiences. Shanxi's rich cultural assets — from Jin merchant heritage to ancient architecture — are being reimaged into distinctive tourism offerings.

*Source:

Mastercard Insights, Desktop research

5.3

Trend 3: The Next Frontier: AI-Powered Travel Evolution

AI Wave Unlocks New Opportunities for Travel Industry

With the rapid development and continuous iteration of artificial intelligence (AI) technology, the tourism industry is undergoing an unprecedented transformation. Chinese tourism platform companies have keenly captured market trends and are actively deploying AI applications and related products. Trip.com Group launched the industry-level large model "Wendao", Tongcheng integrated its "Chengxin AI" large model with Deepseek, Fliggy introduced the travel AI assistant "AskMe", Mafengwo rolled out the AI travel assistant "AI Xiao Ma", and Tuniu developed the AI assistant "Xiao Niu". These platforms leverage AI large models for demand forecasting while also providing assistance in itinerary planning, ticket booking, and attraction reservations, creating a smarter and more convenient travel experience.

Currently, AI's main value for tourism

platforms lies in empowering the entire process with data, improving service efficiency from pre-sales to the travel journey. In the pre-sales stage, AI can integrate massive data and product resources to achieve precise traffic acquisition; in the after-sales stage, natural language processing and chatbot services enhance efficiency and user experience; during the trip, AI assistants offer real-time guidance and feedback, making the journey smoother.

While some fear AI agents may displace online travel agencies (OTAs), they are more likely to strengthen them — each AI-powered transaction feeds back into the platform, forming a closed data loop that enhances intelligence and competitiveness.

Globally, nearly 40% of travelers now use AI for trip planning. However, most Chinese OTAs remain in early-stage deployment, The next wave of AI innovation in tourism is still unfolding, with high expectations for future breakthroughs.



***Source:**

Mastercard Insights, Desktop research

A photograph of a cable car (funicular) on a narrow, cobblestone street in Lisbon, Portugal. The cable car is white and orange, with a price tag of 3.70 € visible. It is moving up the street, which is lined with white buildings and balconies. Several people are walking on the street, and a body of water is visible in the background. A large, semi-transparent orange shape is overlaid on the bottom half of the image, containing the chapter title.

Chapter 6

Cross-border Tourism: Facilitation and Sustainability

6.1

Outbound Tourism Facilitation Suggestions

Cross-border tourism is an essential bridge connecting the world, and an increasing number of Chinese travelers are opting for outbound trips to broaden their horizons, enrich their cultural experiences, and promote international exchange. However, visa restrictions, transportation challenges, cultural differences, and language barriers make convenience, safety, and affordability top priorities compared to domestic travel. Based on our research, we offer six recommendations across two stages—pre-departure and during travel—to further facilitate cross-border tourism.

1. Streamline visa policies and boost digital border clearance

Since 2024, over ten countries have introduced visa facilitation measures for Chinese travelers. From traditional destinations like Southeast Asia, Japan, and South Korea to emerging spots in Central Asia and the Caucasus, travel options have expanded significantly. Simplified visa policies directly drive demand—after Thailand and Singapore announced visa-free entry, search volumes surged 500%, and outbound travel in the first month jumped two to three times year-on-year.

We recommend expanding bilateral visa exemptions and mutual recognition of e-visas, while promoting digital visa platforms for near-instant online approvals. Accelerating biometric clearance systems at ports—such

as facial recognition at Incheon and Changi airports—can cut processing times to under 30 seconds, creating faster, more efficient travel channels for Chinese tourists.

2. Expand outbound hubs and optimize flight networks

In the 2024 summer season, the Civil Aviation Administration of China added over 200 international routes, with cities like Chengdu, Chongqing, Wuhan, and Qingdao emerging as key outbound hubs. For example, Chengdu introduced direct flights to Paris and Cairo, improving intercontinental access for western China.

Airlines should leverage big data to dynamically adjust flight frequency and city coverage, strengthen code-sharing partnerships with foreign carriers, and develop “smart scheduling platforms” for real-time route monitoring and alerts, helping travelers plan more efficiently.



3. Offer diverse and personalized travel products

As outbound tourism rebounds, Chinese mainland travelers increasingly seek cultural immersion, unique experiences beyond traditional sightseeing. Providers can tailor innovative offerings for different segments—for instance, China Eastern Airlines and China Southern Airlines launched “Fly Globally at Wish” for affordable global travel; Royal Caribbean Cruises offers classic cruise itineraries; and trending experiences include aurora hunting in Iceland, Antarctic island-hopping, and overseas concerts. Aligning products with social media trends can boost engagement and inspire travel.

4. Build an AI-powered one-stop outbound service platform

By integrating resources from governments, travel platforms, airlines, and insurers, an AI-driven “Smart Outbound Cloud Platform” can deliver end-to-end services—from visa applications and flight bookings to hotel reservations, insurance, currency exchange, and emergency assistance—ensuring a safe, efficient, and seamless travel experience.

5. Upgrade to chip cards for secure, convenient overseas payments

In regions like Europe, the U.S., Japan, South Korea, and Southeast Asia, Chip-based payment and tap-to-pay have become



mainstream payment methods in scenarios such as retail, transportation and dining. Tap-to-pay enables quick transactions, while magnetic stripe cards face declining acceptance and higher fraud risk. Domestic issuers should accelerate chip card adoption and provide pre-trip guidance on contactless payment to improve the overseas payment experience.

6. Create a “Chinese-friendly” destination ecosystem through online-offline integration

Since 2024, countries such as Spain, France, Japan, the UAE, and Singapore have launched official accounts on Xiaohongshu, Tiktok and Weibo, publishing Chinese content and partnering with OTAs like Ctrip for joint campaigns. Offline, airports and shopping districts in Japan, Thailand, and France increasingly offer Chinese signage, customer service, menus, and dining options tailored to Chinese tastes. China Mobile and others provide global SIM cards and data packages covering 200+ countries, with Chinese-language support and instant top-ups.

However, many destinations remain at a basic level of localization, focusing mainly on translation, and lack integrated operational-level services. We recommend creating a unified “Chinese-friendly” entry point—bundling city passes, card benefits, public transport, attraction tickets, audio guides, shopping discounts, data packages, emergency hotlines, tax refund services, and complaint channels into a single, ready-to-use platform upon arrival.

*Source:

Civil Aviation Administration of China , Mastercard Insights

6.2

Inbound Tourism Facilitation Suggestions

In recent years, China has steadily expanded visa-free access and extended transit visa exemptions, making it easier for international travelers to visit and fueling rapid growth in inbound tourism. At the same time, leading global KOLs and travel influencers have shared their experiences in China on social media, significantly boosting international interest in the Chinese tourism market.

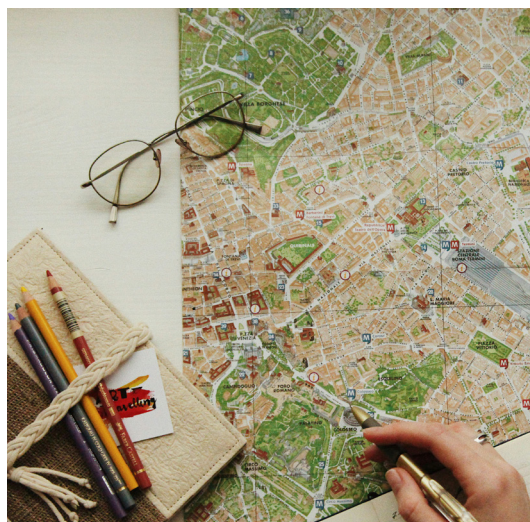
To further accelerate inbound tourism, we conducted research on the end-to-end visitor journey and identified key areas for development for reference.

1. Strengthen Marketing for Inbound Tourism

2023-2024 Cross-border Tourism Consumption Trends Report recommends that local cultural and tourism authorities collaborate with international OTAs (Online Travel Agencies) and media to deliver multilingual promotional content. This year, official campaigns have ramped up, such as the “Hello, China” Asian Travel Agents Tour, which attracted over 100 top travel agent representatives from Japan, South Korea, Singapore, and Thailand, etc., covering 14 Chinese cities. Beyond official channels, topics like “China Travel” and Trip.com ads in Hong Kong have sparked widespread discussion. We suggest focusing on three areas—information integration, official recommendations, and social media

engagement—to build a globally influential image of Chinese tourism.

- **Information Integration:** Develop a multilingual travel information system in partnership with domestic and international service providers, offering essential details on visas, transportation, culture, climate, and connectivity. Online platforms can embed visa application sites and major booking platforms, while offline channels can distribute printed guides through overseas travel agencies
- **Official Recommendations:** Launch themed itineraries such as culinary tours, heritage experiences, and architectural highlights, as well as short trips near airports. Use AI to





enable personalized itinerary planning and enhance visitor engagement

- **Social Media Engagement:** Leverage short videos, mini-series, and hashtag challenges, amplified by overseas KOL, to create a diverse communication matrix. For example, Ctrip has brought over 1,000 first-time KOL to China, including U.S. KOL "IShowSpeed," whose 2025 China livestream peaked at 7.71 million viewers and generated over 1 billion video views, driving strong global interest in Chinese tourism.

• 2. Improve International Transport Connectivity

To enhance convenience and capacity, efforts should focus on flight availability, multimodal transport, and streamlined customs clearance, forming a closed loop of "capacity assurance—multimodal transport—efficient clearance."

- **Flight Availability:** In 2024, China operated 585,000 international passenger flights, up 93.4% year-on-year. We recommend adding direct routes to newly visa-free countries and major source markets, optimizing

schedules, and expanding direct flights to inland destinations like Chengdu and Xi'an

- **Multimodal Transport:** Promote air-rail integration, already available in cities like Shanghai, Beijing, and Guangzhou. Develop bundled packages and highlight combined transport benefits to encourage uptake. For long-haul travel, leverage China's extensive transport network through air-rail or air-air connections

- **Streamlined Clearance:** Introduce passenger flow alerts, dynamic resource allocation, online arrival cards, and self-service kiosks with multilingual support. Deploy robots and virtual assistants to improve guidance and reduce wait times. Malaysia's "Digital Arrival Card," for example, allows pre-submission of details online, eliminating manual paperwork and improving efficiency

3. Enhance Mobile Internet Experience

While inbound visitors increasingly use Chinese apps, the degree of internationalization remains limited. Some apps are unavailable in overseas stores,

requiring downloads after arrival, and The UI/UX design could be further optimized to accommodate global user preferences. Restaurant recommendations and reviews in lifestyle apps also lack multilingual optimization. Improving international compatibility and user experience will ensure a smoother digital journey.

4. Upgrade Scenic Spot Experience

Real-name reservations and ID-based entry systems have improved convenience for Chinese Mainland travelers but remain challenging for foreign visitors. Scenic spots should adopt international booking systems supporting passports, multilingual services, and global payment options, combined with technologies like e-passports and facial recognition for seamless entry.

Additionally, explore AI guides, VR tours, and robotic services to enrich experiences. On one hand, providing customized serviced for

families, youth groups, and cultural explorers; One the other hand, refining itineraries and services for different source markets.

5. Improve Payment Convenience

China has made progress in foreign card acceptance but can expand coverage and enhance usability. Increase merchant acceptance in transport hubs, hotels, and attractions, and promote contactless payment. Strengthen awareness of card-binding options at key touchpoints like visa sites, airports, and hotels. For example, Mastercard's "Pay like a Local" program is extending foreign card binding to more scenarios.

6. Optimize Tax Refund Experience

Overseas visitor spending accounted for just 0.5% of China's GDP in 2024, below the global average of 1%-3%. Enhancing the tax refund experience is conducive to further promoting inbound consumption.

It is advisable to further advance the digital transformation of the departure tax refund system. Building digital electronic platforms and AI-assisted systems for pre-review and automation to alleviate the pressure on in-person service operations.

The goal is not only eligibility but also speed, clarity, and quality—delivering a tax refund experience that is fast, transparent, and satisfying



*Source:

National Immigration Administration, Civil Aviation Administration of China, Mastercard Insights

6.3

Insights and Reflections on Sustainable Development

As inbound and outbound travel becomes increasingly streamlined, the tourism industry's growth is no longer just about scale—it's about achieving long-term sustainability. Against the backdrop of China's "dual carbon" goals and the global shift toward greener tourism, sustainable cross-border travel has emerged as a critical priority for governments, financial institutions, and industry stakeholders. Forecasts by the United Nations World Tourism Organization (UN Tourism) and World Travel & Tourism Council (WTTC) indicate that by 2030, global outbound travelers will surpass 1.8 billion, with Chinese tourists remaining the largest and fastest-growing segment. Meanwhile, climate change, digital transformation, and responsible consumption are fundamentally reshaping how cross-border tourism operates.

Future outbound journeys will be defined not just by destination choices but by a holistic expectation of "low-carbon, convenience, and responsibility." Integrating tourism innovation, payment solutions, and sustainability principles is becoming a central challenge for the global travel industry.

1. Innovating Tourism and Promoting Responsible Consumption — From Local Action to Sustainable Development

An increasing number of destinations are combining local lifestyle experiences with sustainability initiatives, attracting travelers through local commitments, eco-certifications, and community-based experiences. For instance, Ctrip data from 2024 shows that Chinese bookings for ecological projects and responsible tourism in Europe and Southeast Asia grew by over 40% year-on-year. This trend not only fulfills travelers' desire for authentic experiences but also fosters a stronger sense of responsibility. For Chinese tourists, the shift from price-driven decisions to responsibility-driven choices is emerging as a key trend in outbound travel.

Beyond the excitement of cross-border journeys and upgraded experiences,



destinations are increasingly leveraging “local commitments” to advance sustainability—from transforming industrial sites into ecological zones and preserving cultural heritage to integrating farming activities with eco-tourism. Localization is becoming a critical pathway to delivering both a sense of responsibility and deeper, more meaningful travel experiences.

In Anhui, the historic villages of Hongcun and Yixian showcase traditional Hui-style architecture and rich Huizhou culture, complemented by ecological landscapes and educational programs. Visitors can admire the architectural heritage while actively engaging in initiatives like village conservation and immersive cultural experiences.

2.Advancing Cross-Border Payment Solutions — From Efficiency to Value Creation

As digital payments become widespread globally, the payment process is emerging as one of the most promising points of value creation in the travel experience. In the past, the focus was primarily on convenience and security of transactions; today, payment carries greater responsibility: it can serve as an entry point for green consumption and social good. Paperless ticketing and

e-invoicing significantly reduce resource waste, while carbon credit mechanisms on payment platforms guide travelers toward low-carbon travel and eco-friendly merchants.

Inclusive cross-border payments help remote regions and small businesses access global markets. This not only improves efficiency but also drives environmental protection and economic growth, making every payment linked to responsibility and value. For example, Mastercard has introduced the world's first credit card that sets spending limits based on your carbon footprint. Singapore Airlines has partnered with payment institutions to launch a “carbon offset option,” allowing passengers to donate to environmental projects during payment. In the future, as fintech converges with ESG standards, payment will become a critical hub for driving tourism toward sustainable transformation.

3. Shaping a Sustainable and Inclusive Growth Model — Transitioning from Economic Momentum to Global Responsibility

The global tourism sector is moving beyond sheer scale to strike a balance among environmental, social, and economic priorities. Sustainable growth is no longer just about meeting emission targets—it is also about building long-term resilience for destinations. Chinese travelers are not only major drivers of consumption but also key partners in the sustainability transition. Payment innovations and responsible finance initiatives by card networks act as vital connectors, exemplified by Mastercard’s programs to digitally empower SMEs across multiple countries, enabling them to join cross-border payment ecosystems. Each transaction by Chinese tourists contributes directly to the growth





of local small businesses and community employment. Leveraging digital identity and payment technologies, these efforts also bring more vulnerable groups into the tourism value chain, strengthening destination sustainability.

Costa Rica's government has teamed up with Mastercard to launch a destination-focused e-commerce and cross-border fulfillment platform, offering an integrated chain that connects "intangible cultural heritage, digital storefronts, secure payments, and global logistics." The initiative enables travelers to easily shop for local handicrafts before and during their trip and have items shipped worldwide. At the same time, it empowers micro and small businesses, as well as artisan

communities, to go digital and strengthen their payment and online capabilities.

4. From Overtourism to Balanced Tourism

With the rebound of cross-border travel, many popular destinations are grappling with overtourism—manifested in pollution, traffic jams, and local discontent. The answer lies not in rigid restrictions but in fostering balanced tourism. Redirecting visitors to smaller cities and towns, and promoting rural and eco-tourism, helps ease the burden on major hubs while driving regional economic equity. Increasingly, destinations are adopting measures such as off-peak travel incentives, discounted public transport, and data-driven crowd management. This approach safeguards ecosystems and cultural heritage while expanding tourism's benefits, paving the way for a more sustainable growth model.

5. Shifting from Tourism as an Economic Driver to a Catalyst for Community Well-being

Tourism's true value extends beyond economic metrics—it lies in improving livelihoods and fostering social equity. As a major source of employment for women and youth, particularly in developing nations, tourism provides accessible employment opportunities for marginalized groups. Community-based tourism transforms residents from passive hosts into active beneficiaries, enabling them to earn income through guesthouses, handicraft sales, and guided tours. Moreover, tourism development often accelerates investments in clean water, sanitation, and transportation infrastructure. In this way, tourism becomes a systemic enabler of well-being, advancing inclusivity and prosperity

alongside economic gains. Rwanda's mountain gorilla eco-tourism model, for instance, engages villagers directly in guiding and hospitality, boosting household incomes. Similarly, India's "Women Guide Program" equips low-income women with skills training, empowering them as key contributors to the tourism workforce.

6. Evolving from Pure Consumption to a Green Economy Ecosystem

In the era of global sustainability, tourism is emerging as a proving ground for green innovation. Hotels are adopting renewable energy and eco-friendly materials, transport systems are expanding the use of electric vehicles and rail networks, and restaurants are building local supply chains to cut carbon

footprints. At the same time, AI and IoT technologies are powering carbon monitoring, visitor analytics, and ecological alerts—bringing "tech + green" innovation to the sector. Tourism is evolving beyond a mere act of consumption into a holistic ecosystem that fuels both the green economy and technological progress.

***Source:**

UNWTO (2024), WTTC (2025), OECD (2024), China Tourism Academy, Ctrip, Mastercard Insights



Contributors to the Cross-border Tourism Consumption Trends 2024-2025



Sponsor: World Tourism Alliance

The World Tourism Alliance (WTA), established in September, 2017 in China, is a comprehensive, global, non-profit, and non-governmental tourism organization. With its mission and vision of “Better Tourism, Better Life, Better World”, WTA is committed to promoting tourism for peace, development, and poverty alleviation, as well as fostering non governmental global exchanges and cooperation in tourism.

WTA has 269 members from various countries and regions throughout the world, including national or regional tourism associations, influential tourism or tourism-related enterprises, destinations, non-profit organizations, academia, media, and individuals. As a service-oriented international organization that caters to the needs of its members, the WTA strives to create cooperative platforms for dialogue, exchange, cooperation, ideas and information, resource sharing, communication for integrative development, and a thriving marketplace of inspirations and best practices for the benefit of all through travel and tourism.

WTA's headquarters and secretariat are based in Hangzhou, China.





mastercard

Author: Mastercard

Mastercard (NYSE: MA) is a global technology company in the payments industry. Our mission is to connect and power an inclusive, digital economy that benefits everyone, everywhere by making transactions safe, simple, smart and accessible. Using secure data and networks, partnerships and passion, our innovations and solutions help individuals, financial institutions, governments and businesses realize their greatest potential. Our decency quotient, or DQ, drives our culture and everything we do inside and outside of our company. With connections across more than 210 countries and territories, we are building a sustainable world that unlocks priceless possibilities for all.



Trip.com Group™

Supporter: Trip.com Group

Trip.com Group is a leading online travel service provider. Its brands include Trip.com, Ctrip, Qunar, and eLong. Trip.com Group is able to integrate complex travel-related information and provide travel product booking and services through its advanced mobile apps, websites, and 24/7 free customer service centers, helping business and leisure travelers access information and reduce costs. Since its establishment in 1999 and IPO on NASDAQ in 2003, Trip.com Group has grown rapidly and has become one of the largest travel service providers in the world.