



WORLD TOURISM ALLIANCE



Horwath HTL 浩華

March 2023

2023/H1

China Inbound Tourism Market Sentiment Report



Toren, Poland

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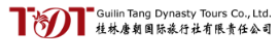
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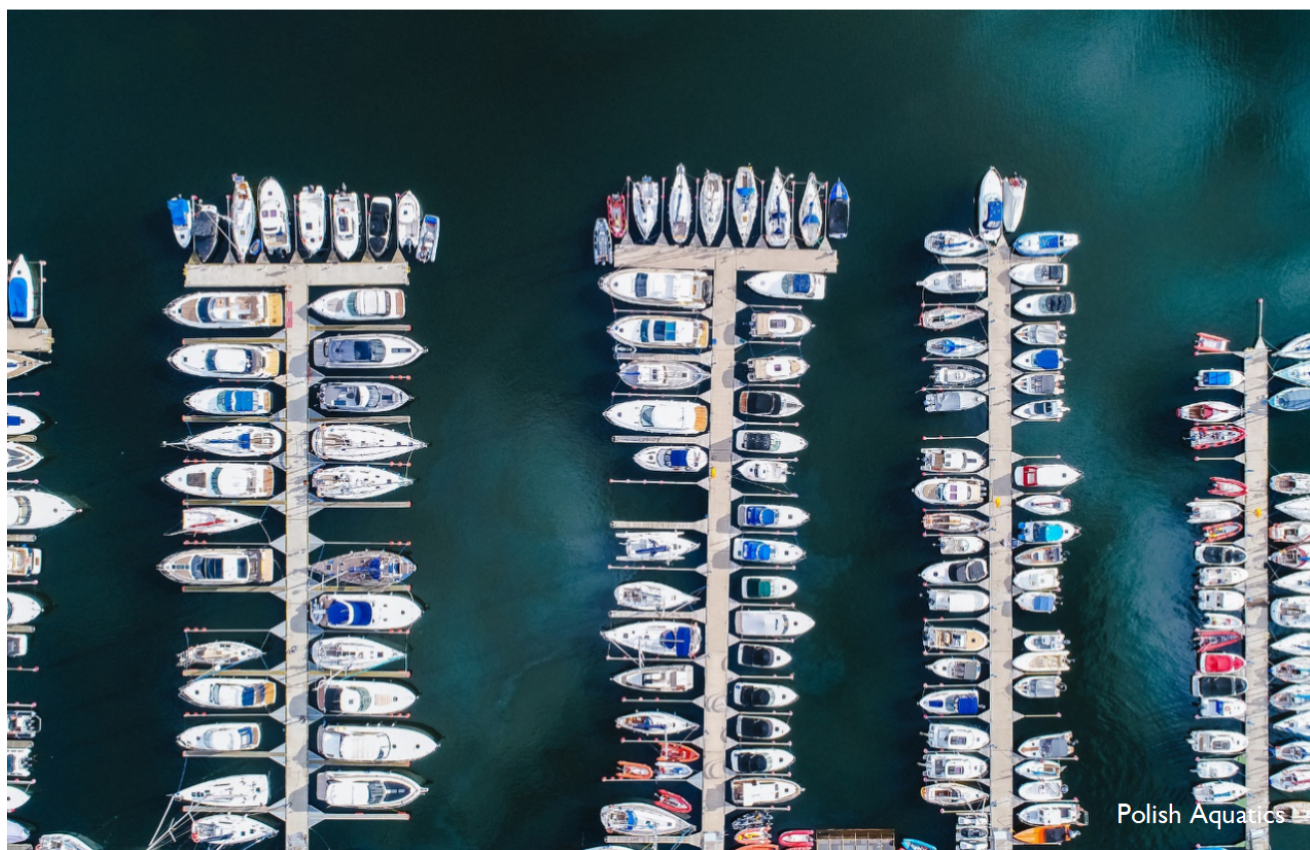


波兰旅游局北京办事处
Polish National Tourist Office in Beijing



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2020 H2 China Inbound Tourism Market Sentiment Report

During the three-year outbreak of COVID-19, inbound tourism was forced to come to a halt. According to the Ministry of Culture and Tourism of China, the number of inbound tourists in 2022 is estimated at 20 million, which is only 14% of that in 2019. At the beginning of 2023, COVID-19 was officially announced to be controlled as "Category B", which is a more liberal policy. This new policy has encouraged the recovery of inbound and outbound tourism after a 3-year hiatus. With the continued improvement in quarantine, visa policy and flight capacity, China inbound tourism market is expected to bottom out in 2023, showing a significant recovery.

Since 2019, the World Tourism Alliance (WTA) has been partnering with Horwath HTL, a leading global hotel and tourism consulting company in conducting sentiment surveys of China inbound tourism. The fifth report of its kind, this survey is aimed at providing WTA members and global stakeholders with a better understanding of the key trends of China inbound tourism, the factors driving the market to enable them to make informed, fact-driven decisions.

Our special thanks go to Ministry of Culture and Tourism of People's Republic of China, Zhejiang Provincial Department of Culture and Tourism, Shaanxi Provincial Department of Culture and Tourism, Gansu Provincial Department of Culture and Tourism, China Tourism Association, WILDAID, China Air Transport Association, Trip.com Group, Meituan, Qyer, China CYTS Tours Holding Co., Ltd., Hainan Tourism Investment & Development Co. Ltd, New Century Tourism Group, Guilin Tang Dynasty Tours Co., Ltd, Shanghai Spring International Travel Service (Group) Co., Ltd., Tourism College of Zhejiang, China National Tourist Office, Sydney, NETEASE, Fantawild Holding Inc., NARADA, Beijing Metropark International Hotel. As well, our sincere thanks go to Polish National Tourist Office in Beijing for providing us with the images used in this report.

Background

In early 2020, COVID-19 came on strong. Cross-border tourism entered a standstill. In the past three years, the domestic epidemic situation has stabilized amidst fluctuations, and domestic tourism is showing a slow recovery. However, the inbound and outbound tourism market has fallen into a cold winter and the update of the China Inbound Tourism Market Sentiment Report was once suspended.

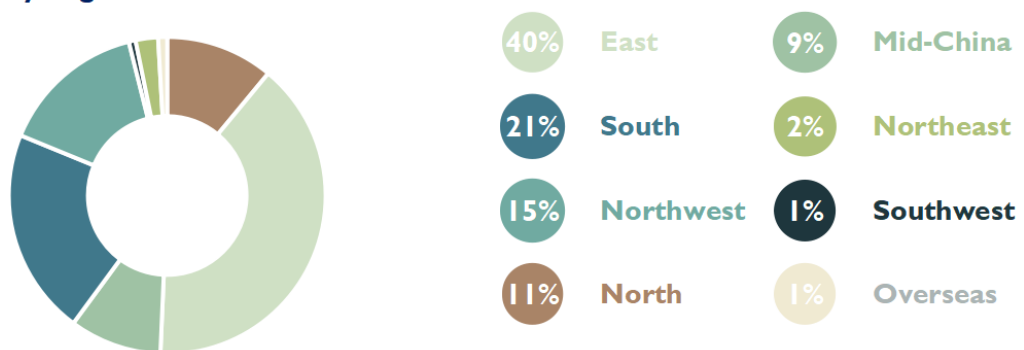
Following the optimization of domestic immigration policies, Inbound Tourism Market Sentiment Report finally resumes in 2023 H1 after a 2-year absence. The survey is dedicated to the comparison of inbound tourism market sentiment before and after the epidemic and covers five aspects aimed at understanding the market's expectations for **inbound tourism arrivals, per capita consumption and total income levels** in 2023 H1.

In order to better analyze and compare the inbound tourism market by region and city, responses are quantified through a specific sentiment score model and presented in the form of scores to reflect the respondents' expectations on inbound tourism. The scores were measured and compared across China by different regions and cities.

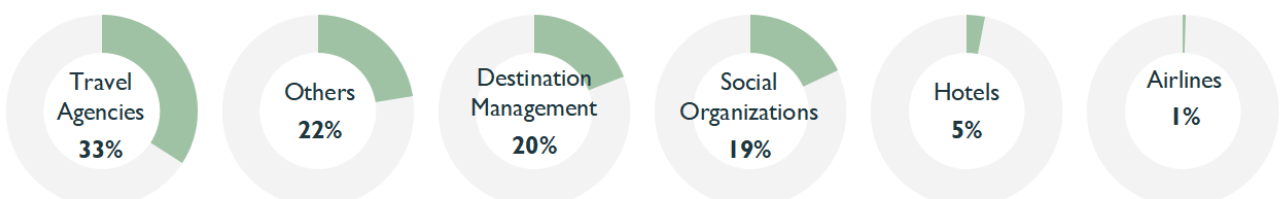
A sentiment score is assigned to each question, with scores ranging from negative 150 points to positive 150 points. A negative 150 score indicates a state of absolute pessimism, a score of zero indicates unchanged expectations and a score of positive 150 indicates a highly optimistic sentiment. Respondents were asked to compare the expected market performance in 2023 H1 to the actual performance in 2019 H1. They were asked to identify factors contributing to the variance and provide their insights on the tourism source markets and destination markets.

This is the fifth survey conducted by Horwath HTL and the World Tourism Alliance for the China inbound tourism market. This report summarizes the research results of the Inbound Tourism Market Sentiment Survey for the first half of 2023, which received **436** valid questionnaires from 23 provinces, municipalities and autonomous regions, as well as 4 overseas regions.

Samples by Region



Samples by Organization Type



Market Sentiment Analysis



2023 H1



2019 H1



2019 H2

Since the end of 2022, China has been optimizing the travel restrictions related to the epidemic, and the 100-billion-dollar consumer market for inbound tourism, which was deposited for 3 years, has been restarted. In China's overall tourism system, the scale of the inbound tourism market is extremely limited, its development is relatively lagging, and it has been on a "downhill" path since before the epidemic. However, after the opening of the country's gates, the rigid demand for inbound tourism that has been pent up for the past three years is expected to be effectively released. The frequent issuance of favorable policies also makes respondents confident about the development of the industry. The average sentiment index for China's inbound tourism market reached **15** in 2023 H1, increasing by **13** index points from 2019 H1 before the epidemic and it is the highest since this survey was conducted.

OTA platform data shows that since the inbound quarantine and visa policies have been relaxed, the inbound demand has been rising - flight tickets have shown a rise in both volume and price, indicating that **2023 will be the first recovery year for inbound tourism to bottom out**. However, it is inescapable that it will still take a long time from policy issuance to market recovery. It is expected to be difficult for the inbound tourism market to return to 2019 levels in the short term, which mainly stems from the following factors.

International route adjustment approval process is relatively cumbersome

Prolonged industry stagnation seriously damages ecology - the product and service chains are fragmented

Massive inbound tour companies closed down during the epidemic, with serious brain drain

Other national destinations taking the lead in the international tourism market

Looking forward, with the stable return to normalization of epidemic-related travel policies and the vigorous promotion of various national policies, inbound tourism in China is expected to **recover in an orderly manner** as the keynote in the short to medium term **with a fluctuating rebound**. Along with the reshaping of the inbound tourism market system and the improvement of tourism product quality, inbound tourism is expected to achieve effective revitalization.

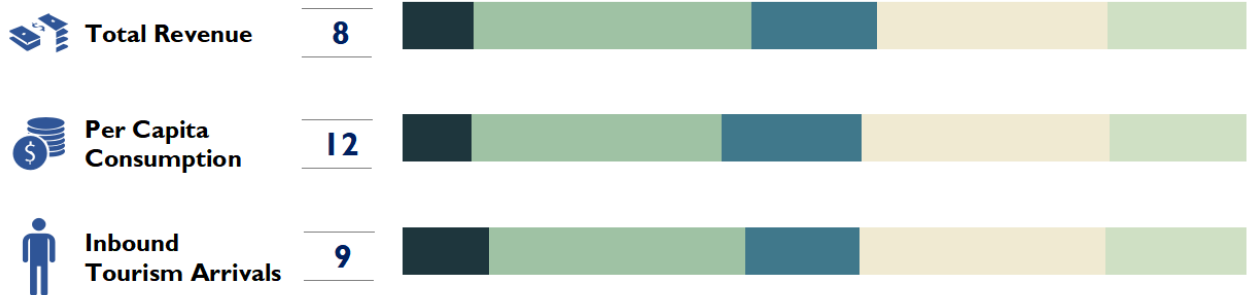
With gates opening, respondents are expecting the market to recover, a long way back to pre-epidemic levels. Of the three indicators, inbound per capita consumption levels are the most dynamic.

Q1. How do you expect the overall performance of inbound tourism market in 2023 H1 vs. 2019 H1?

Sentiment Score

10

■ Much Worse ■ Worse ■ Same ■ Better ■ Much Better



Early 2023 national immigration policy has been optimized in response to changes, and the long quitting inbound tourism has welcomed the hope of recovery and rebound. From the data above, respondents maintain a positive attitude towards the overall performance of the inbound tourism market, **with the sentiment scores of all three indicators in 2023 H1 higher than those in 2019 H1**. On the one hand, the positive sentiment score shows the strong expectation and confidence of the remaining respondents for the reopening of the inbound gate and the rebound of tourism performance after the harsh period; on the other hand, a large number of plans to visit friends and relatives back home during the epidemic were forced to be put on hold, and such rigid demand also formed the basis for the orderly recovery of inbound tourism, which to a certain extent pushed up the sentiment score.

However, **the positive boom index in 2023 H1 does not mean that inbound tourism is expected to recover to the level in 2019 H1**. Although the sudden turn of the epidemic policy at the end of 2022 has brought a dawn of hope to the long gloomy inbound tourism industry, under the epidemic, the industry chain has suffered, and it will take time to recover.

Overall, **it is difficult to restore inbound tourism to pre-epidemic levels in the short to medium term due to multiple factors such as flights, visas and industry chain restructuring**. However, the liberalization of the epidemic prevention policy has been an effective “heart booster” and has revived the confidence of tourism respondents in the inbound tourism market in 2023 H1.

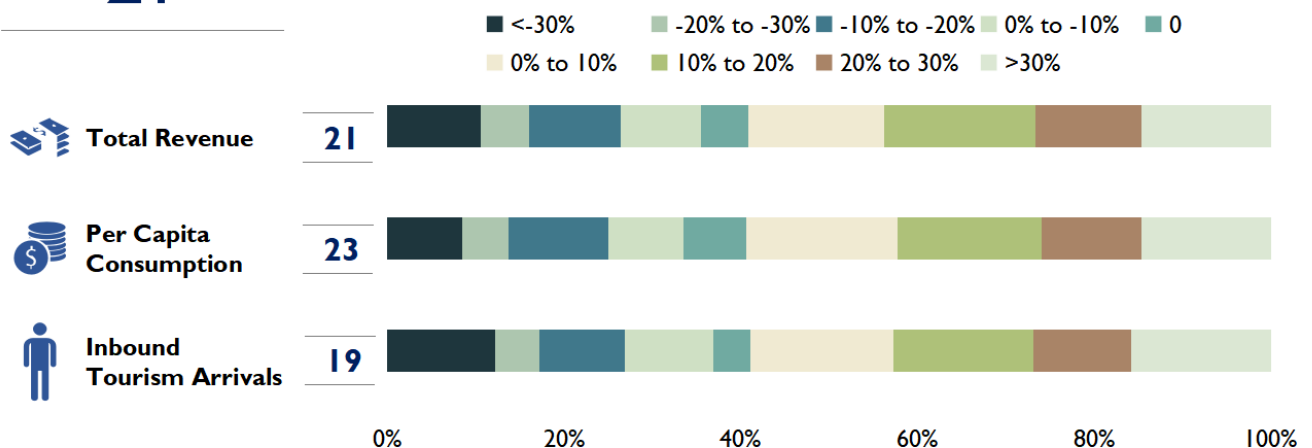
Among the three indicators, respondents have the highest positive expectation for per capita consumption of inbound tourism, with its sentiment score rising by 25 index points in 2023 H1 compared to 2019 H1, which is also the largest increase. As of supply, product premiums are showing up as the quality of China's tourism products and systems continue to be optimized; as of demand, tourists who choose to travel to China upon the opening of the gates are bound to have a stronger willingness to travel and pay higher prices. **With joint effect of both supply and demand, per capita consumption showed a more positive boom signal.**

Positive sentiment stands out, where respondents are more confident in the recovery of their own institutional performance and generally more expectant of total revenue driven by per capita consumption.

Q2. For your business, what is your year-on-year expectation for the growth/decline in 2023 H1 vs. 2019 H1?

Sentiment Score

21



The institutional sentiment index rose by 10 index points in 2023 H1 compared to 2019 H1, even higher than the overall market sentiment, which implies that **respondents are more optimistic about the recovery of inbound tourism in their own institutions/regions**. Such results are somewhat related to the survey sample, as more than 60% of respondents were from East and South China, with Shanghai and Guangzhou being the main destinations for business and tourist-oriented inbound travel. Therefore, local respondents are undoubtedly more confident in the recovery.

At the same time, similar to the overall market situation, **per capita consumption of inbound tourism** is also the indicator that the respondents expect to recover best in 2023 H1, which is hopefully to compensate to some extent for the slow recovery of inbound tourism arrivals, pulling down the total revenue.

Across all key indicators, nearly 60% of respondents are confident that 2023 H1 will deliver growth compared to 2019 H1. Of course, we do not believe that such results mean that inbound tourism performance of regions/institutions in 2023 H1 is expected to equal or even surpass the pre-epidemic level. We analyze such positive results for the following two main reasons.

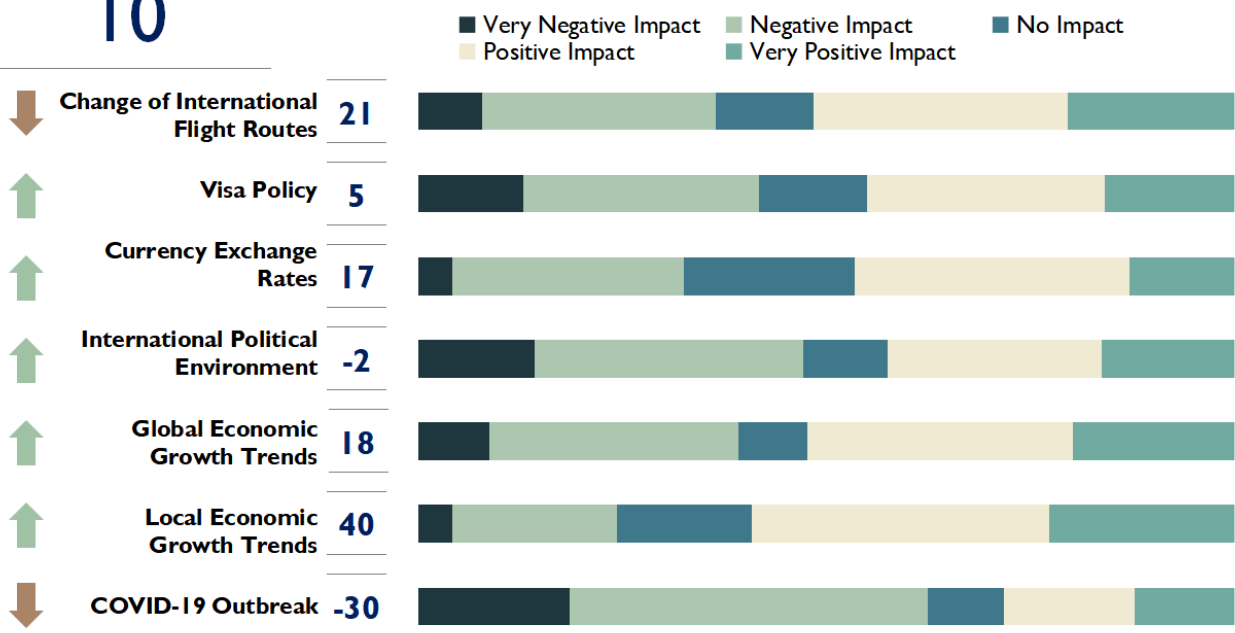
1. Compared to outbound and domestic tourism, the inbound tourism market is weak, having shown a slow downward trend before the epidemic, and almost bottomed out during the epidemic. In such a market where supply is contracting significantly due to the impact of the epidemic, a recovery of any magnitude will drive significant growth rates to the overall market.
2. The relaxation of the quarantine policy has brought vitality to inbound tourism, greatly boosting the confidence of respondents and making them look forward to the performance of their own regions/institutions in 2023 H1.

The uncontrollable nature of COVID-19 and the continuous volatility of the international political environment are considered to be negative factors affecting the recovery of inbound tourism market performance.

Q3. How do you expect each factor below to influence China inbound tourism market 2023 H1 vs. 2019 H1?

Sentiment Score

10



Respondents hold positive expectations for most of the influencing factors. However, it is worth mentioning that **change of international flight routes** is considered the only negative factor. Despite the relaxation of the epidemic prevention policy, the capacity of international flights is still significantly insufficient in the short term due to the restricted approval of international flight. Therefore, airfares are significantly higher than pre-epidemic levels, drawing back the resumption of inbound travel. Restoring the number of international flights will not only take time, but also requires active communication with airlines.

In addition, among the positive factors, the **visa policy** positivity is low. The weak friendly entry visa policy is also a long-standing drawback to the development of China inbound tourism. The recent entry into force of mutual visa waiver with Maldives also releases positive signals in this regard.



The **international political environment** is considered the major constraint on the development of the inbound tourism market, as was the case in 2019 H1. Over the past three years, the game of big powers has triggered a series of negative global economic and political interactions that have created difficulties for tourism recovery.

Moreover, COVID-19 outbreak is also a “time bomb” of great concern. The mutated strains that appear from time to time at home and abroad not only affect the health status of individual tourists and their willingness to travel, but also lead to changes in national epidemic prevention policies. This has led to an extremely negative sentiment among respondents about the impact of this indicator.

All international source markets of inbound tourism have seen an improvement in expectations. Asia, the traditional main source region, has particularly positive market expectations.

Q4. What is the performance expectation for each inbound travel source market below in 2023 H1 vs. 2019 H1?

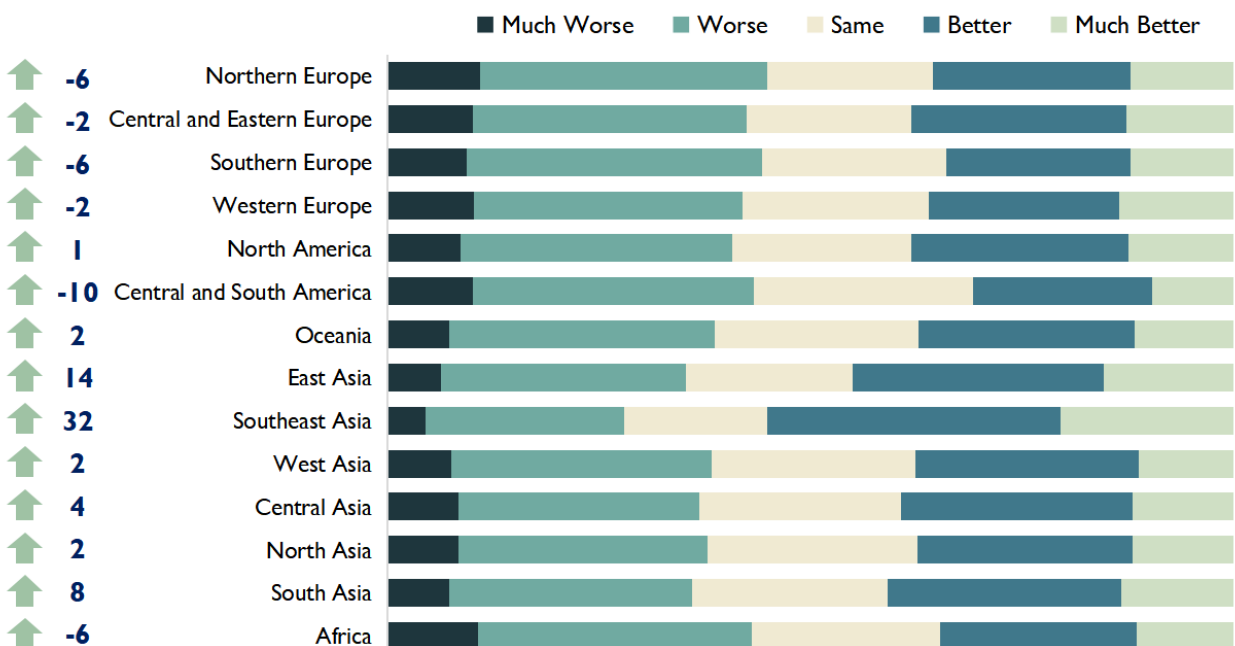
Asia has long been a traditional source market for China inbound tourism. In the post-epidemic era, the global economic situation is not optimistic, short-haul travel is more popular. As a neighboring country enjoying absolute distance advantage, Asia is also expected to be the first region to show the quantitative recovery of inbound tourism. Expectations for the performance of to Southeast Asia and East Asia in 2023 H1 were particularly positive, with both regions continuing their positive pre-epidemic sentiment scores and growing by **16** and **12** index point respectively. OTA platforms also confirms this expectation - since the relaxation of the prevention policy, air tickets are mainly sourced from popular departure cities such as Hong Kong SAR, Bangkok and Seoul. On the one hand, the transportation cost to China is currently relatively low for these regions. On the other hand, in 2022 and 2023, the RECP (Regional Comprehensive Economic Partnership Agreement) signed between China and 14 countries, including the 10 ASEAN countries, will come into effect one after another. Regional economic integration and other measures are expected to deepen relations with Asian countries, driving a sustained rise in inbound tourism activity. However, it is worth noting that the recovery of travel demand from Japan and South Korea is expected to be volatile due to bilateral policies, and it is difficult to see explosive growth in the short term.

Among other regions in Asia, the sharp rise by **31** index point of West Asia compared to the pre-epidemic period is also noteworthy. The rapid resumption and even increase in air routes between China and the Middle East, as well as the increase in spending power of potential arrivals, will be the motivators of inbound tourism.

Sentiment Score

3

Respondents showed positive expectations for the overall inbound tourism source markets, with the sentiment score rising sharply by **21** index points in 2023 H1 compared to 2019 H1. The performance of the neighboring regions - Southeast Asia and East Asia - is expected to be more promising.



Among the global source markets, expectations in Central and South America and Africa remain negative but have risen significantly from the same period before the epidemic.

Q4. What is the performance expectation for each inbound travel source market below in 2023 H1 vs. 2019 H1?

Europe is one of the main source markets for China long-haul inbound tourism. Although the sentiment score has improved significantly, respondents still maintain a cautiously pessimistic attitude. Among the Western inbound tourists, those from European countries with the same cultural heritage are generally more favorable and respectful of Chinese traditional culture and have a high willingness to travel to China in depth. However, Europe is facing multiple impacts such as the energy crisis, high inflation and the continued extension of the European Central Bank's interest rate hike cycle, and the economy is under severe pressure, which negatively affects the volume and spending power of inbound tourism to China.

Oceania is not the main force of China inbound tourism. Except Australia and New Zealand, other Oceania countries have limited population and spending power. Respondents are slightly optimistic about their development expectations in 2023 H1 compared to 2019 H1. The sentiment score turned from negative to positive, up **21** index points, which may be linked to New Zealand as one of the RECP signatories.

North America is the region with the largest population in China long-haul inbound tourism source market, with superior inbound tourism arrivals and spending power compared to other source markets. From the data, respondents' market expectations for North America show a slightly positive attitude, with its sentiment score rising **17** index points in 2023 H1 compared to 2019 H1. However, the relationship between China and the U.S. is more delicate and sensitive, influenced by various factors

such as diplomacy and trade. In addition, during the three-year epidemic, under the Western media, North American countries, mainly the U.S. and Canada, have shown a more negative public sentiment toward China. This is not conducive to the long-term development of the U.S. market for China inbound tourism.

Africa is a region with low economic development in most countries, with inflation soaring and challenges to feeding the population. COVID-19 has further led to an increase in poverty and extremely limited demand for local outbound tourism. Against this backdrop, respondents are pessimistic about Africa as a source of inbound tourism. However, over the past years, China-Africa trade and other cooperation is frequent, and the "Belt and Road" cooperation plan also enters the North Africa region for the first time, and the friendship between China and Africa is steadily increasing. The sentiment score has also increased significantly, rising by **28** index points.

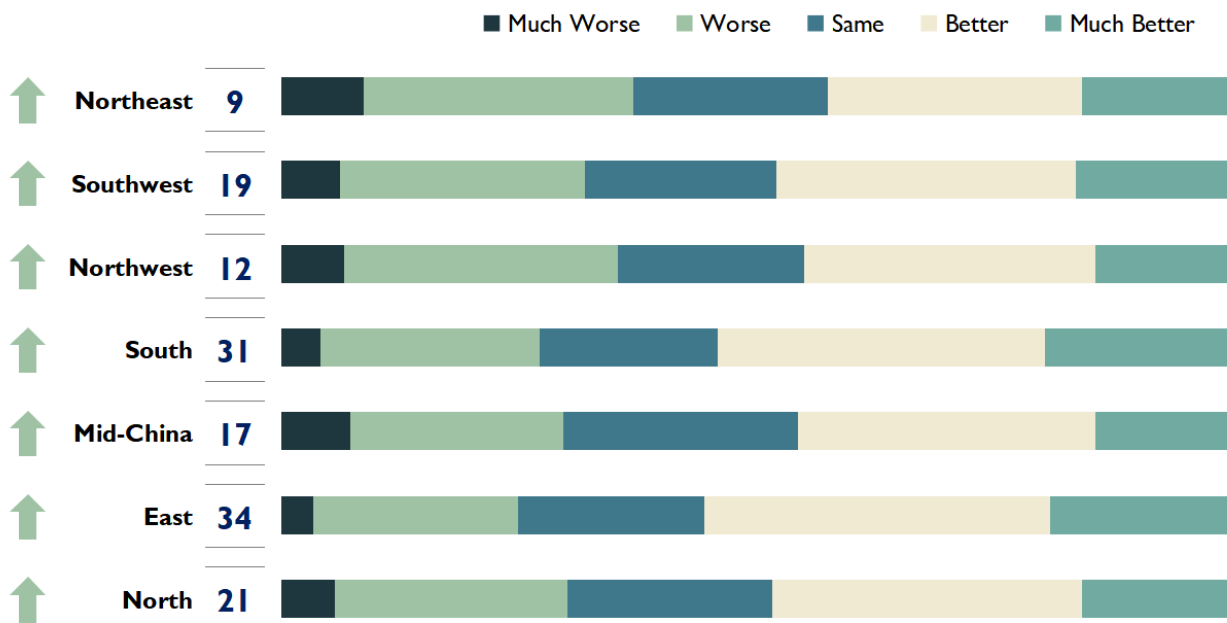
Central and South America, as one of the most distant regions on earth from China, has relatively sluggish economic development. Long-term facing the real crisis of both high unemployment and inflation rates, its contribution as a source market is limited. Central and South American countries, represented by Brazil, are also plagued by political instability and domestic social divisions. Potential inbound tourists are low, and respondents' expectations for their markets are the most pessimistic among all source countries worldwide, with a sentiment score of **-10**.

All domestic destination markets of inbound tourism have increased their expectations, with East China and South China continuing to take the lead.

Q5. How do you expect each inbound travel destination market below to perform in 2023 H1 vs. 2019 H1?

Sentiment Score
20

Market sentiment scores for all regions in China as inbound destinations are trending up in 2023 H1 compared to 2019 H1. Among all regions, East China and South China continued their consistently positive trend and topped the destination market sentiment scores. The Northeast region, although with the lowest positive score, has the most significant growth trend nationwide compared to the same period before the epidemic.



Looking at the past development of inbound tourism, it is obvious that **cities are becoming more and more independent inbound tourism source markets, playing an important role in the overall tourism system.** In terms of cities, popular destinations for China inbound tourism can be classified into 3 categories by product type.

1. International metropolises with frequent business activities and developed economic levels, represented by first-tier cities such as Shanghai, Guangzhou and Shenzhen.
2. Traditional cultural tourism destinations representing China's long history and profound connotations, represented by Beijing and Xi'an.
3. Destinations with scarce natural landscapes and quality tourism facilities support, such as Guilin and Lijiang.

Based on these three types of products, China's popular system of inbound tourism destinations and their strings of tourism routes have become more mature. Cities with world cultural heritage and international influence, such as **Beijing, Xi'an, Shanghai, Guilin and Guangzhou**, constitute the main structure of China's national tourism image to the outside world.

North and Southwest China have a higher sentiment score, while Northeast China still maintains its pre-epidemic situation and ranks at the bottom of the country.

Q5. How do you expect each inbound travel destination market below to perform in 2023 H1 vs. 2019 H1?

East China continues its consistently positive trend and continues to lead the inbound tourism destination market with the top spot in the sentiment score for the second consecutive year. With Shanghai as the core engine and Suzhou as the emerging generator, East China is not only the highland of China's modern and international city development, but also has a wealth of world-renowned tourist attractions such as Suzhou gardens, Hangzhou West Lake, Shandong's Mount Tai and Fujian's Tulou. Coupled with the positive economic development and strong transportation hub in the overall region, it attracts a large number of inbound tourists.

South China relies on popular destinations for inbound tourism such as Shenzhen, Guangzhou and Guilin. Its sentiment score as an inbound destination rose **21** index points to the second place in the country, only slightly lower than that of East China. The open economic system of Guangzhou and Shenzhen is expected to continue to attract business-oriented inbound tourists. Also, with the continued optimization of tourism support facilities, Guilin, known for its natural scenery, will also be revitalized as a core city for inbound tourism after the epidemic.

North China's primary market for inbound tourism is Beijing. As the capital of China and a famous historical and cultural city, Beijing has always been one of the top destinations for all kinds of inbound tourists. From the classic world heritage sites of the Great Wall and the Forbidden City to the positive external image created by the recent Winter Olympics, Beijing has a long-standing attraction for foreign visitors. At the same time, as the capital, Beijing also attracts a large number of study and business arrivals. The sentiment score in North China rose **23** index points in 2023 H1.

Southwest China's Chengdu, Chongqing and Yunnan are also rising inbound tourism destinations in

recent years. As the internet-famous cities, the governments of Sichuan and Chongqing have been committed to exporting their city images to the outside world. Their diverse ethnic cultures, spicy hot pot and Sichuan pandas have become the tourism labels of the Southwest China. Its sentiment score rose by **13** index points. The region itself is expected to form a classic loop of inbound tourism in the future, strengthening the aggregated attraction.

Mid-China, situated with world-renowned attractions such as Longmen Grottoes and Shennongjia, saw its sentiment score turn to positive in 2023 H1, improving by **19** index points. With the orderly resumption of international flights in Changsha and Wuhan, respondents' confidence in inbound tourism recovery also rose positively.

Northwest China is not a popular destination for inbound tourism, except for Xi'an. However, the sentiment score also shows a positive upward trend, which indicates that respondents are confident that domestic inbound tourism is picking up across the board. At present, the number of international routes resuming in Xi'an is still on the low side. However, along with the expansion of the third phase of the airport and the optimization and adjustment of routes in the next season, its transportation connectivity with various countries will be further enhanced, attracting more inbound tourists to visit cultural heritage sites such as the Terracotta Warriors and Horses.

Northeast China is still at the bottom of the country, despite a significant increase in the sentiment score. The limited development of its inbound tourism industry is restricted by a lack of tourism products, reception quality and transportation convenience, coupled with insufficient publicity and relatively limited international visibility. The promotion aimed at major source countries such as Russia, Japan and Korea is expected to become a new round of growth.

Conclusion

With the official renaming of COVID-19 and the removal of the "Five Ones" and centralized quarantine measures related to the epidemic from the end of 2022, the inbound tourism is gradually recovering and rebounding. The negative impact of the epidemic on the tourism industry is steadily diminishing, all indicators in this survey show a significant upward trend in 2023 H1 compared to 2019 H1, and respondents are full of confidence. However, there is no denying that inbound tourism is only on the first steps of the "road to rebound" **and it will take a long time to fully recover to pre-epidemic levels.**

According to the **performance indicators**, respondents generally expect the recovery of per capita consumption of inbound tourism to be better than tourism arrivals and total revenue. Also, perhaps influenced by the sample, there is greater confidence in the performance expectations of their own regions/agencies. As for the **influencing factors**, COVID-19 outbreak is still considered to be the "primary culprit" affecting inbound tourism performance. In addition, the continued volatile international political environment is also a negative factor for inbound tourism recovery. As for other positive influencing factors, the change in international flight routes is the only factor that shows a decline in the index compared to the pre-epidemic period. In the short to medium term, the international flight routes will remain in continuous optimization and adjustment. In terms of the **source markets of inbound tourism**, all regional sentiment scores rose positively, with the Asian region, led by Southeast Asia and East Asia, remaining the main source of inbound tourists. From the perspective of **destination markets**, the sentiment scores of all seven regions in the country showed considerable increases in 2023 H1 compared to 2019 H1, with East China and South China continuing to take the lead. Based on the changes in the sentiment of various domestic and international inbound tourism sources and destinations, it is evident that **respondents are confident in the recovery of performance in all dimensions, benefiting from the relaxation of epidemic prevention policies.**

Inbound tourism is less active than the other two tourism markets, and even worse, it hit the bottom during the epidemic. However, it carries the important function of promoting China's traditional culture and international image to the outside world. Under the continuous promotion of various national favorable policies, **China inbound tourism market is bound to usher in a new opportunity of peak turnaround.** In the smooth and orderly recovery process, **the repair of the whole elements of the inbound tourism product supply chain and system** is the primary problem faced by practitioners. It is worthy of consideration by industry colleagues how to accurately control the changes in supply and demand, which are very different from before the epidemic, and activate nearly new channels and resources. In addition, for China inbound tourism industry, the lack of international product quality and systematic external promotion has been a long-standing problem. Enhancing the quality of domestic world-class tourism destinations, focusing on the construction of city tourism brands, and innovating to promote international communication – **these measures are feasible and necessary** in the long run, under the increasingly fierce competition of global tourism destinations.



Appendix

About World Tourism Alliance

On Sept. 11, 2017, the World Tourism Alliance (WTA)—the world’s global, comprehensive, non-government, nonprofit tourism organization founded in China—was inaugurated in Chengdu, Sichuan Province, China.

Upholding the vision of “Better Tourism, Better World, Better Life” as its ultimate mission, WTA is committed to promoting peace, development and poverty alleviation through tourism. It aims at driving global tourism exchanges and cooperation at non-governmental level.

To date, WTA has 228 members from 42 countries and regions. The WTA membership covers national and regional tourism associations, influential tourism and tourism-related enterprises, government tourism boards, academia, media and individuals. As a service-orientated international organization which caters to its members across the world, WTA is a vital platform for dialogue, networking, practical and authoritative information and resource sharing for integrative development.

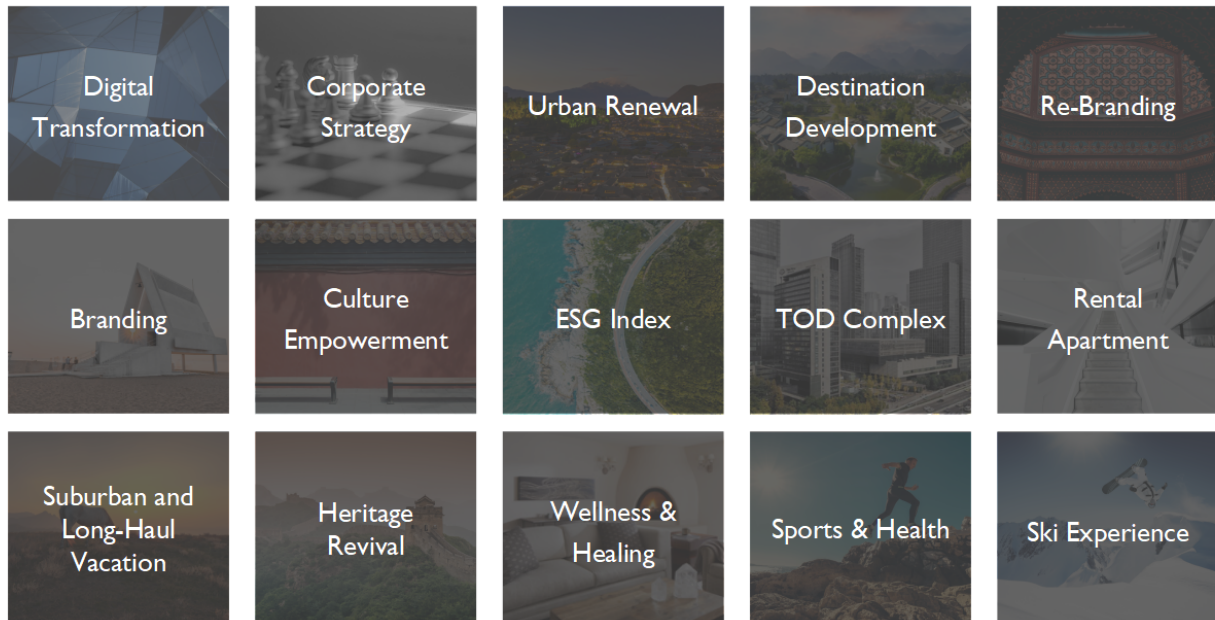
The WTA headquarters and Secretariat are located in China.



About Horwath HTL

As a centennial corporate, Horwath HTL participated in the creation of “Uniform System of Accounts for the Lodging Industry” that are still used worldwide. Starting from the beginning of its entry into the mainland China market in 2003, Horwath HTL collect and analyze industry benchmarking data for “China Hotel Industry Study” with the China Tourist Hotel Association. As the first international consulting company to bring the international hotel investment and development standard process to the Chinese market, Horwath HTL has been leading the industry development for 20 years in China. Horwath HTL was the first to introduce the concept of “per square meter efficiency” to help the industry to make accurate investment and asset management; and created industry data standards such as MSI (Market Sentiment Index) and MVI (Market Value Index) to help upstream and downstream practitioners to further understand the market. In 2022, Horwath HTL launched HOHI data platform and started to build up the ESG index system to further guide the digitalization and sustainable transformation of the industry. In the new era, relying on abundant project experience, customized consulting services, HOHI data platform and CHAT branding and marketing platform, Horwath HTL provides professional services covering multiple dimensions and the full life cycle an is always committed to providing various professional solutions to promote the continuous evolution of the wonderful lifestyle industry.

Multi-Dimensional and Full Life-Cycle Professional Solutions



Three Brands and Business Segments

Horwath Business

Industry-wide Customized Consulting Service

Business Modules

Development Strategy Solution
Destination Solution
Hotel Solution



HOHI Business

Industry-wide Information Integration and Big Data Analysis Platform

Business Modules

Industrial Mapping Tool
Business Evaluation Tool
Data & Report

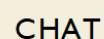


CHAT Business

Branding, Resource Connection and Integrated Marketing Platform

Business Modules

Branding
Integrated Marketing Campaign
Platform Promotion





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