Travel and Tourism in China to 2018

Description:
China's travel and tourism sector recorded a marginal growth during the review period (2009-2013). Domestic tourism is the major contributor to the sector and increased from 1.01 billion in 2009 to 1.45 billion in 2013. Government initiatives focusing on domestic tourism, infrastructure development, and promotional campaigns in key source countries such as Hong Kong, Macao, and the US are the major drivers for tourism growth in China. However, international arrivals recorded a decline of 3.5% to 55.7 million in 2013 from 57.7 million in 2012. Inbound tourist numbers were adversely affected by ongoing pollution problems and a lengthy visa process.

- Domestic tourism is the major driving force of the Chinese tourism sector. The total number of domestic trips increased from 1,014.4 million in 2009 to 1,455.9 million in 2013, at a CAGR of 9.45%. Total domestic tourist expenditure posted a CAGR of 32.12%, increasing from CNY1,018.4 billion (US$149.1 billion) in 2009 to CNY3,103.3 billion (US$500.3 billion) in 2013.

- International arrivals to China increased at a CAGR of 2.28%, from 50.9 million in 2009 to 55.7 million in 2013. Inbound tourist expenditure increased at a CAGR of 2.41%, from CNY271.0 billion (US$39.7 billion) in 2009 to CNY298.2 billion (US$48.1 billion) in 2013. However, international arrivals to China decreased from 57.7 million in 2012 to 55.7 million in 2013, at a rate of 3.5%, which can be attributed to reasons such as the sluggish global economy, rising exchange rate of the Yuan, and on-going pollution problems.

- The Approved Destination Status (ADS) policy came into operation in 1995 to account for the growing demand in China for international travel and the growth in disposable income. Chinese citizens can travel for pleasure to ADS countries on group tours consisting of five or more people (including the tour guide) on a special, simplified visa.

- The Chinese cruise tourism sector has recorded growth. According to the China Cruise & Yacht Industry Association (CCYIA), the number of overseas cruises departing from the Chinese mainland increased from 24 in 2006 to 170 in 2012.

- Trends in air pollution in China will be difficult to reverse, thereby negatively affecting the tourism sector. According to TTIC analysis, international arrivals in China have decreased from 57.7 million in 2012 to 55.7 million in 2013, representing a decrease of 3.5% over 2012 due to worsening air pollution.

- China's airlines have increasingly looked outward over the past several years. Growth in the international segment has been stronger for China Eastern Airlines and China Southern Airlines than for Air China. In 2013, China Eastern Airlines recorded an average annual growth of 18.5% and 21.2% for international ASKs and international PAX, respectively, while China Southern recorded 22.8% and 13.80% growth respectively.

- The number of hotel establishments in the country decreased from 14,237 in 2009 to 11,895 in 2013, with budget hotels recording a negative CAGR of -14.75%. The decline can be attributed to the recent consolidations that have taken place in the budget segment. For example, Home Inns acquired Motel 168 in May 2011, and eJia Express in July 2012.

- China's car rental market grew at a CAGR of 23.04% during the review period, to reach a market value of CNY9.5 billion (US$1.5 billion) in 2013. Due to an increase in disposable income, leisure purpose trips have increased, consequently leading to a rise in leisure-car rental.

- The online channel's market value increased from CNY27.3 billion (US$4.0 billion) in 2009 to CNY93.6 billion (US$15.1 billion) in 2013, at a review-period CAGR of 36.09%. With internet penetration growing, the online travel market is expected to grow further. In 2014, online travel sales will reach CNY123.7 billion (US$19.8 billion), an increase of 32.1% over 2013.

Synopsis

The report provides detailed market analysis, information and insights, including:

- Historic and forecast tourist volumes covering the entire Chinese travel and tourism sector
- Detailed analysis of tourist spending patterns in China for various categories in the travel and tourism sector, such as accommodation, sightseeing and entertainment, foodservice, transportation, retail, travel intermediaries, among others.
- Detailed market classification across each category, with analysis using similar metrics.
- Detailed analysis of the airline, hotel, car rental, and travel intermediaries industries.

**Reasons To Buy**

- Take strategic business decisions using historic and forecast market data related to China's travel and tourism sector.
- Understand the demand-side dynamics within China's travel and tourism sector, along with key market trends and growth opportunities.

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