

Market and Trade Profile China

China





Overview

- **Chapter 1: Inbound market statistics** provides insights on key statistics about Chinese travellers and who they are. It takes a look at Britain and its competitive set as well as activities of Chinese visitors in the UK.
- **Chapter 2: Understanding the market** takes a close look at Chinese consumer trends, booking, planning and further travel behaviour of this source market. Perceptions of Britain held by the Chinese are also highlighted.
- **Chapter 3: Access and travel trade** shows how the Chinese travel to the UK, how to best cater for their needs and wants during their stay and gives key insights into the Chinese travel trade. Further ways of working with VisitBritain and other useful research resources are pointed out.



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Chapter 1: Inbound Market Statistics





1: Inbound market statistics

Chapter summary

- China is the most valuable market for international tourism expenditure with US\$261.1bn spent abroad in 2016 by Chinese travellers.
- The Chinese outbound market is booming: visits abroad more than doubled in 5 years, from about 41m overnight stays in 2011 to 85m in 2016. By 2020, it is forecast to exceed 110m trips overseas.
- Hong Kong and Macao are usually the most visited destinations by Chinese travellers. With more of them now venturing further away, the USA, France, Germany and Australia were the most popular destinations outside of Asia for Chinese visitors in 2016.
- China was the 24th largest inbound source market for the UK in 2016, and the 12th for spend. Chinese visitors could be good advocates for Britain as 73% would be 'extremely' likely to recommend Britain for a holiday.



Source: International Passenger Survey by ONS, Oxford Economics, UNWTO.



Chapter 1.1: Key statistics

Key insights

- China was the 24th largest inbound source market for the UK in 2016, and the 12th for spend.
- 2016 was a record year in terms of nights spent in the UK for the Chinese market, but it was the second-best for visits and spend, after 2015 reached record levels for both.
- 46% of Chinese visits to the UK were made by holidaymakers in 2016.
- Business visits' share of inbound (18% of 2016 visits) has more than halved compared to ten years ago (41% in 2006).
- In 2016 Chinese visitors spent 65% of their nights in the UK outside of London.
- Students make up 42% of the nights spent by Chinese visitors in the UK: China is a key market for study tourism.
- Chinese visitors in the UK like going shopping, visiting parks and gardens, as well as museums and art galleries.



Source: International Passenger Survey by ONS



1.1 Key statistics

Global context

Measure	2016
International tourism expenditure (US\$bn)	261.1
Global rank for international tourism expenditure	1
Number of outbound visits (m)	85.0
Number of outbound visits, excl. Hong Kong and Macao (m)	57.3
Most visited destination overall	Hong Kong
Most visited destination overall (excl. Hong Kong and Macao)	Thailand
Most visited destination in Western Europe	France

Inbound to UK overview

Measure	Visits (000s)	Nights (000s)	Spend (£m)
10 year trend (06-16)	+143%	+276%	+394%
2006	107	1,376	104
2007	143	2,856	177
2008	108	2,312	137
2009	89	1,166	117
2010	109	2,303	184
2011	149	2,906	240
2012	179	4,000	300
2013	200	4,918	503
2014	185	4,486	497
2015	270	3,929	586
2016	260	5,166	513
Share of UK total in 2016	0.7%	1.9%	2.3%

Source: International Passenger Survey by ONS, Oxford Economics, UNWTO.



1.1 Key statistics – volume and value

Inbound volume and value

Measure	2016	Change vs. 2015	Rank out of UK top markets
Visits (000s)	260	-3%	24
Nights (000s)	5,166	31%	13
Spend (£m)	513	-12%	12
Average nights per visit	20	+36%	7
Average spend per visit (£)	1,972	-9%	8

Source: International Passenger Survey by ONS

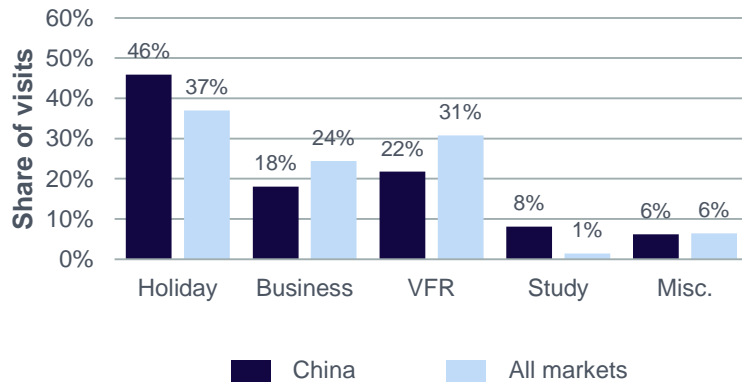
Nights per visit, spend

Averages by journey purpose in 2014-2016	Nights per visit	Spend per night	Spend per visit
Holiday	10	£157	£1,507
Business	12	£185	£2,138
Visiting Friends/Relatives	18	£75	£1,328
Study	98	£93	£9,162
All visits	19	£118	£2,233

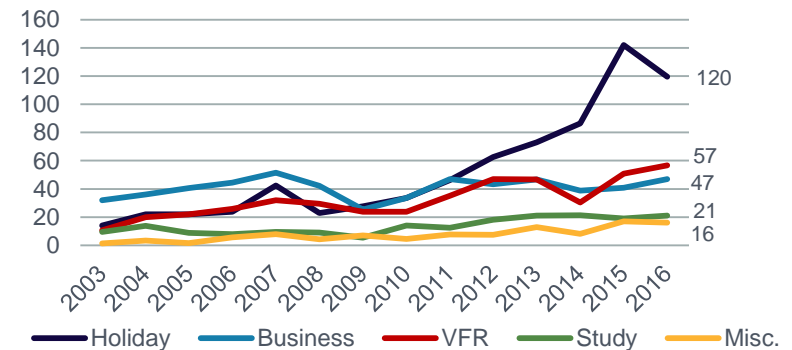


1.1 Key statistics: journey purpose

Journey purpose 2016



Journey purpose trend (visits 000s)



- 46% of all visits to the UK from China were made for holiday purposes, followed by 22% by those visiting friends and relatives in 2016.
- China is still a growing market: in 2015, only 30% of holiday visits from Chinese residents (excluding British expats) to the UK were made by repeat visitors, compared to 63% across all markets.
- On average a Chinese holidaymaker came 1.6 times to the UK in the past 10 years.

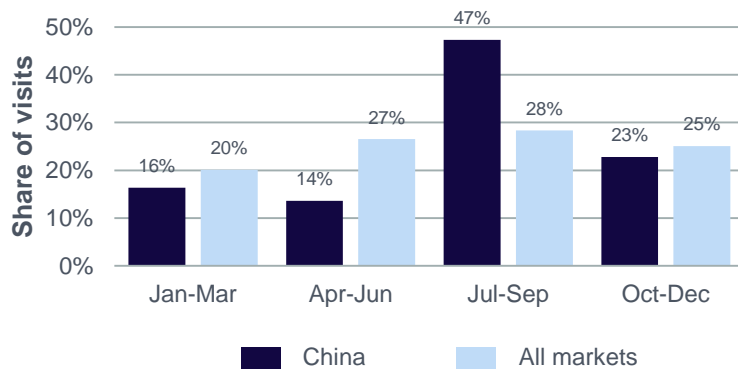
- Holiday visits have led the volume growth in the Chinese market since 2012. In 2015, there were more Chinese holiday visits than all other purposes added together for the first time ever, reaffirming this trend.
- While there were slightly more business visits from China in 2016 than in 2006, their proportion of all visits has more than halved in 10 years (from 41% in 2006, when they were the leading purpose of visits, to 18% in 2016).
- In 2016 there were even more visits to friends and family (VFR) than business visits. VFR visitors are more likely to be repeat visitors than holiday visitors.

Source: International Passenger Survey by ONS; repeat / first time visitors question asked in 2015



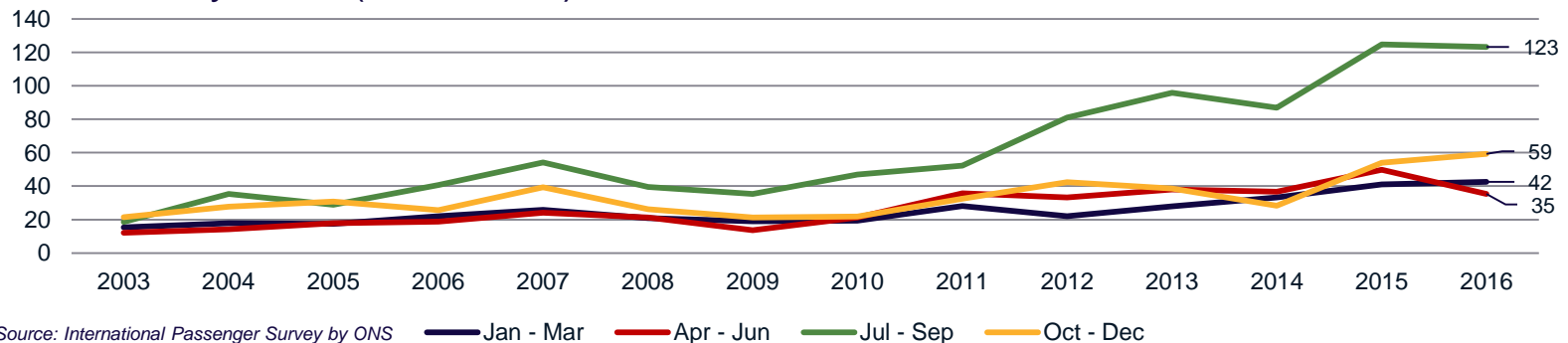
1.1 Key statistics: seasonality

Seasonality 2016



- Visits from China are very seasonal: in 2016 47% of all visits from China were made in July-September.
- Visits during the summer started driving the growth in 2012, around the same time as holiday visits started growing more than other journey purposes. Seasonal direct flights between China and the UK also supported this trend.
- In recent years, October-December has become the second-most popular time to visit the UK. At the beginning of October, there is a week of public holidays in China known as the Golden Week.

Seasonality trend (visits 000s)



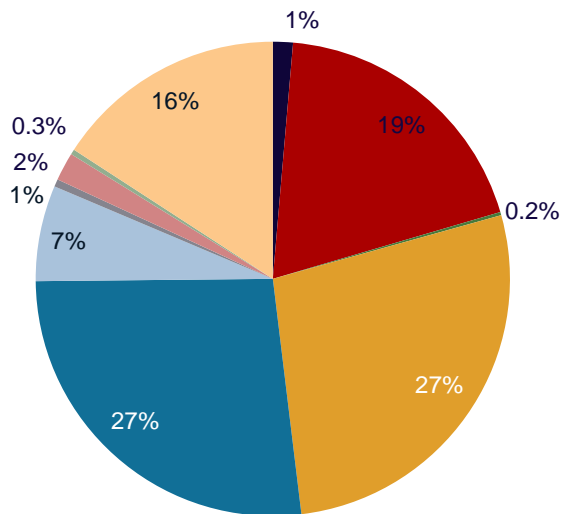
Source: International Passenger Survey by ONS

— Jan - Mar — Apr - Jun — Jul - Sep — Oct - Dec



1.1 Key statistics: length of stay and accommodation

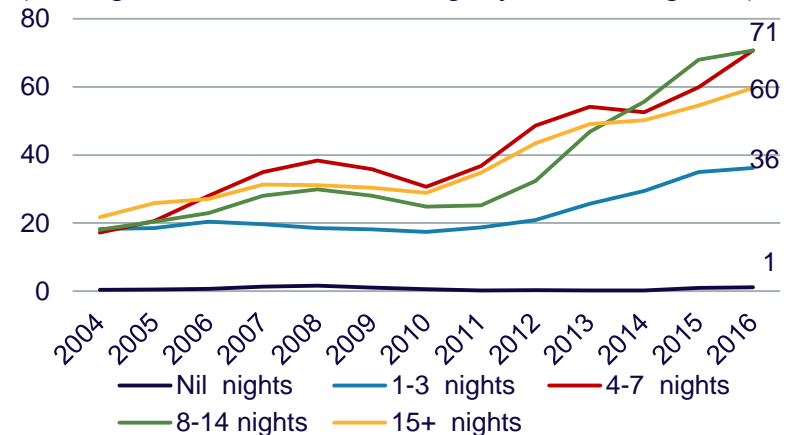
Accommodation stayed in
(average nights in 2014-2016, % share)



- Bed & Breakfast
- Free guest with relatives or friends
- Holiday village/Centre
- Hostel/university/school
- Hotel/guest house
- Other
- Own home
- Paying guest family or friends house
- Camping/caravan
- Rented house/flat

Source: International Passenger Survey by ONS

Duration of stay trend
(average visits in 000s in rolling 3 years ending in...)



- As a long haul destination, Chinese travellers tend to stay for a medium or long trip, and are less likely to stay 1-3 nights.
- Trips of 15+ nights are also quite popular, especially for VFR and study visits.
- 64% of all staying visits included a stay in a hotel or a guest house in 2014-2016. However, Chinese visitors spend more nights in a hostel/university/school or a rented house/flat (43% of all nights respectively), mainly because of the number of nights spent by study visitors.



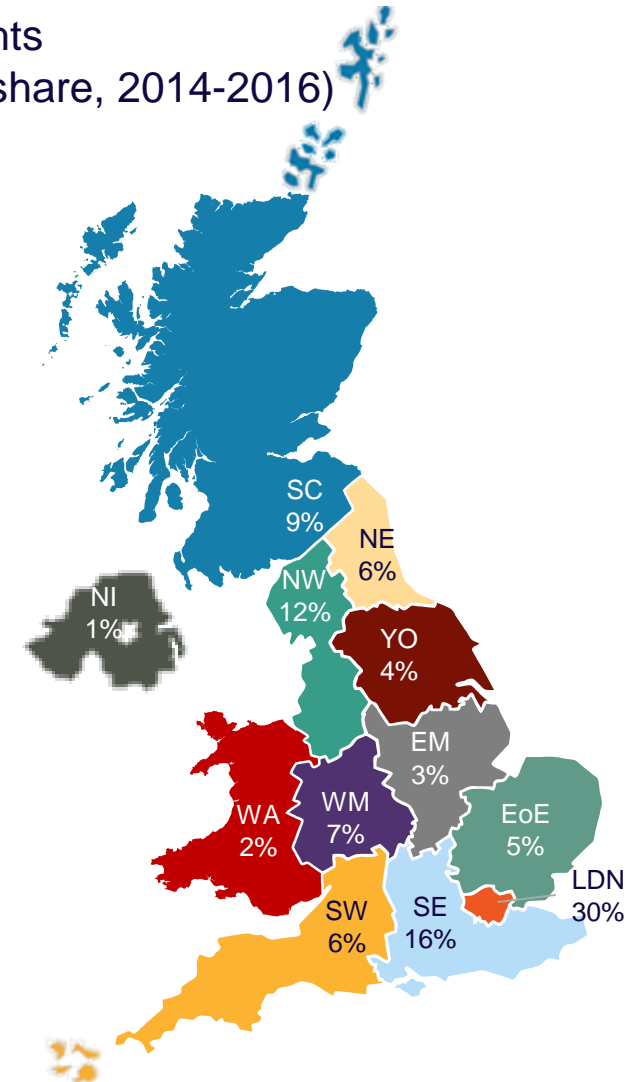
1.1 Key statistics: regional spread

Visits to the UK (2014-2016 average)

Region	Nights stayed (000)	Visits (000)
Total	4,527	238
Scotland (SC)	393	41
Wales (WA)	99	5
Northern Ireland (NI)	23	2
London (LDN)	1,371	144
North East (NE)	249	7
North West (NW)	562	39
Yorkshire (YO)	189	14
West Midlands (WM)	327	20
East Midlands (EM)	117	9
East of England (EoE)	204	19
South West (SW)	265	17
South East (SE)	719	38
Nil nights (Nil)	N/A	1

Source: International Passenger Survey by ONS

Nights (% share, 2014-2016)





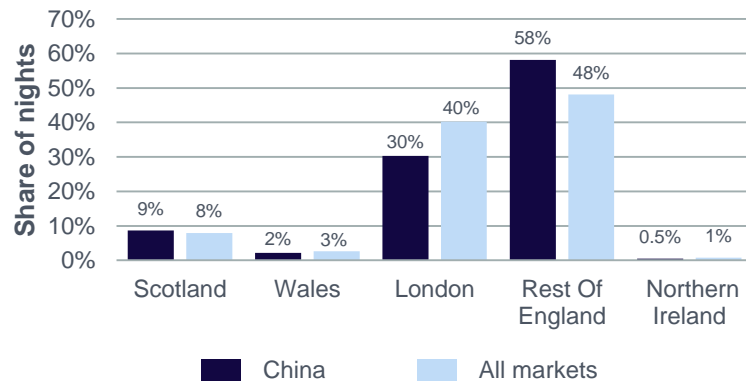
1.1 Key statistics: regional spread and top towns and cities

Top towns and cities visited (2014-2016 average)

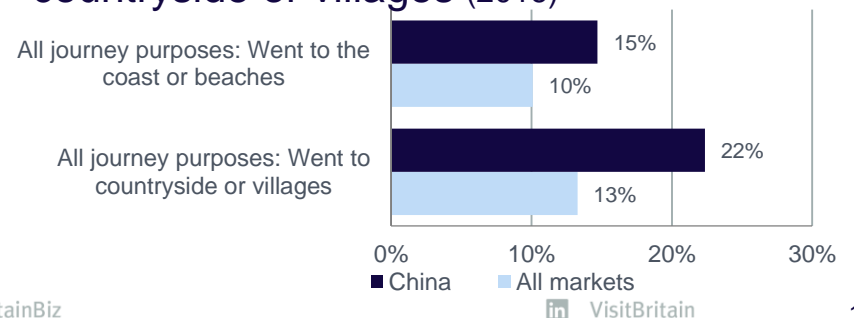
Town	Overnight visits (000s)
London	144
Edinburgh	35
Manchester	23
Cambridge	14
Oxford	13

- Chinese visitors show an above-average spread across the UK's nations and regions. London is the leading destination for a staying trip to Britain, but the South East, North West and Scotland are also popular.
- Indeed 70% of all nights spent by Chinese visitors in the UK in 2014-2016 were spent outside of London, compared to 60% for the all-inbound market average.
- If we consider the regional spread by purpose of visit, 54% of nights spent in the UK by Chinese holidaymakers were spent in London in 2014-2016. However, over half of the nights for each of the other purpose of visits were spent in the rest of England.
- Visits from China have an above average propensity to feature rural and coastal areas of Britain.

Regional spread (2014-2016)



Propensity to go to the coast or beaches, countryside or villages (2016)

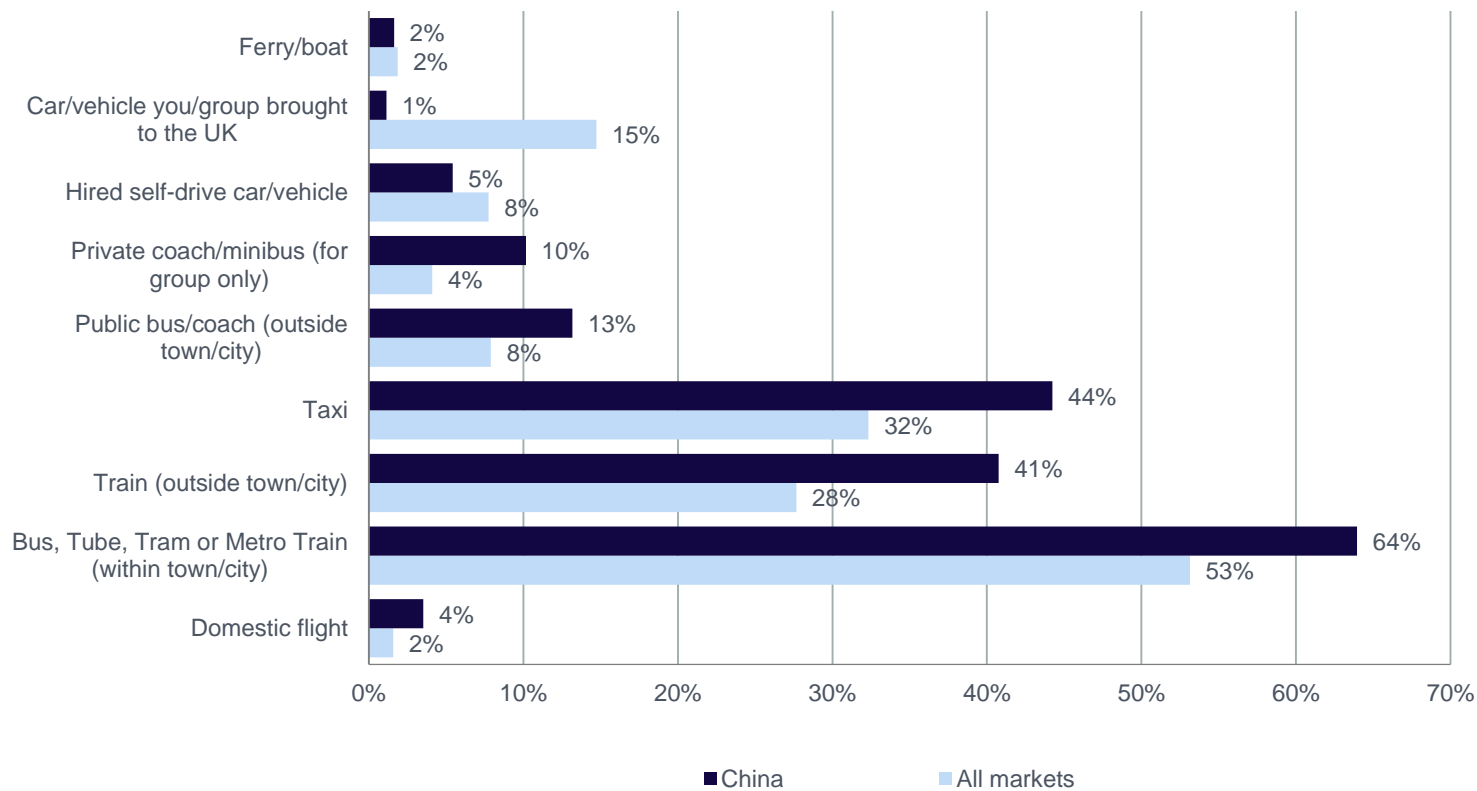


Source: International Passenger Survey by ONS.



1.1 Key statistics: use of internal modes of transport

Propensity to use internal modes of transport

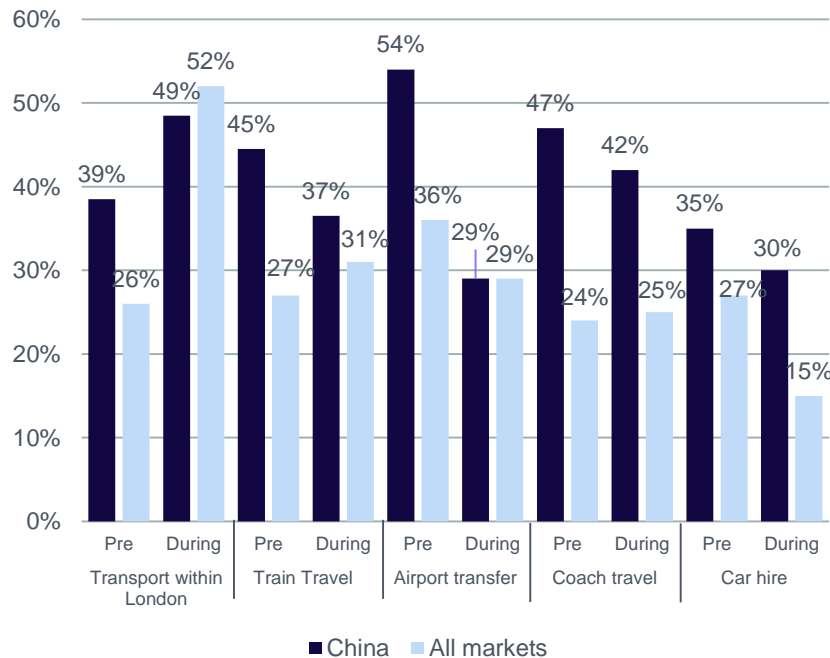


Source: International Passenger Survey by ONS (2013)



1.1 Key statistics: purchase of transport and package tours

Transport services purchased before or during trip (%)



- Chinese visitors are more likely than the average to take taxis or to take public transport when staying in a town or a city, with 44% and 64% respectively doing so, compared to 32% and 53% respectively for the all-market average.
- When getting out of a town or city, they are also more likely to get on a train (41%), but also to take a public bus or coach (13%), or even a private one for a group (10%). However they are less likely to drive a car within the UK, compared to other markets.
- Usually they also tend to prefer booking those transport elements before they travel, with more Chinese holiday visitors booking their airport transfer, train or coach travel, and rental cars before the trip than during.

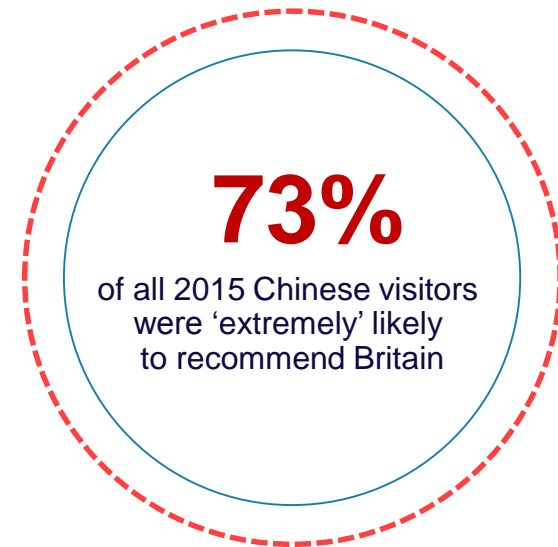
International Passenger Survey by ONS, VisitBritain/IPSOS 2016, base: visitors



1.2 Visitor demographics

Visitor characteristics

- The average Chinese visitor is younger than the all-market average visitor: 51% of the 2014-2016 visits from China were made by people aged 0-34 years old. The 25-34 and 35-44 year-old segments are leading the growth in visits for this market.
- The overall gender ratio of visitors is evenly balanced. However, when looking at trips by journey purpose, there are more women than men for every journey purpose except for business visits.
- Most inbound visits to the UK from Chinese residents were made by Chinese nationals (85% of all visits), but 21% of VFR visits were made by British nationals in 2016.
- Less than a third of the holiday visits are repeat visits (excluding British expats).
- Chinese visitors are more likely to advocate for a stay in Britain than the all-market average: 73% of Chinese past visitors are 'extremely' likely to recommend it, against 69% across all inbound markets.



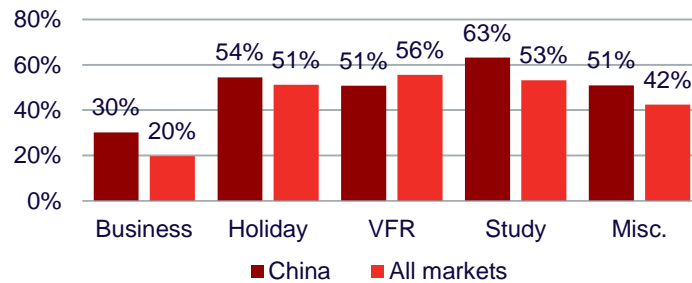
Source: International Passenger Survey by ONS.



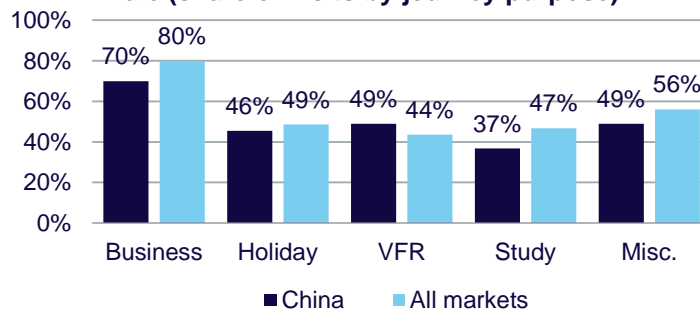
1.2 Visitor demographics: gender and age groups

Visitor demographics:
gender ratio of visits from China for 2014-2016:
50% female, 50% male

Female (% share of visits by journey purpose)



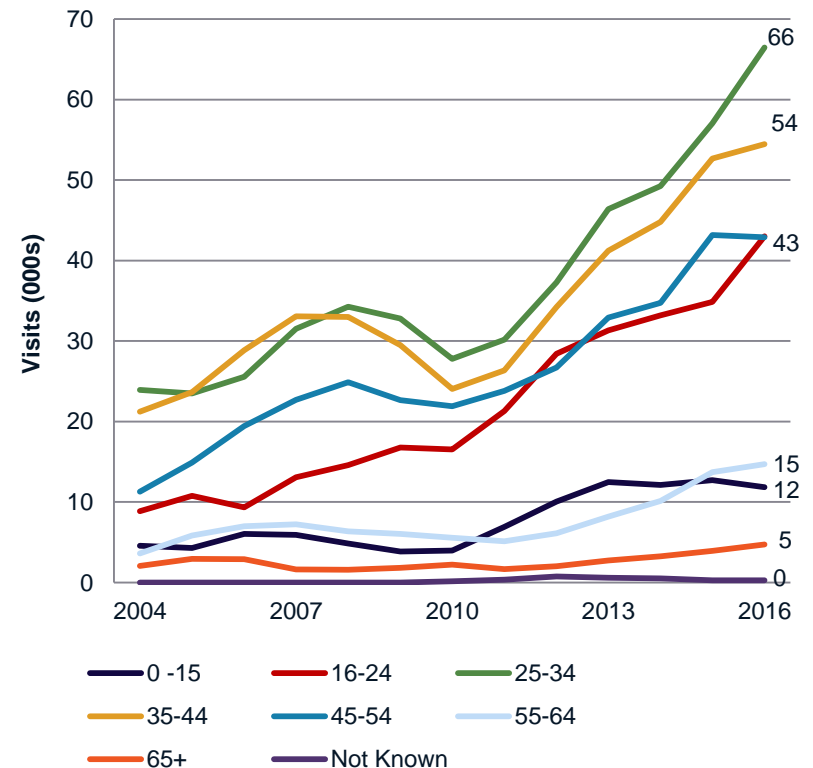
Male (share of visits by journey purpose)



Source: International Passenger Survey by ONS

Age group trend

(average visits in 000s on rolling 3 years ending in)



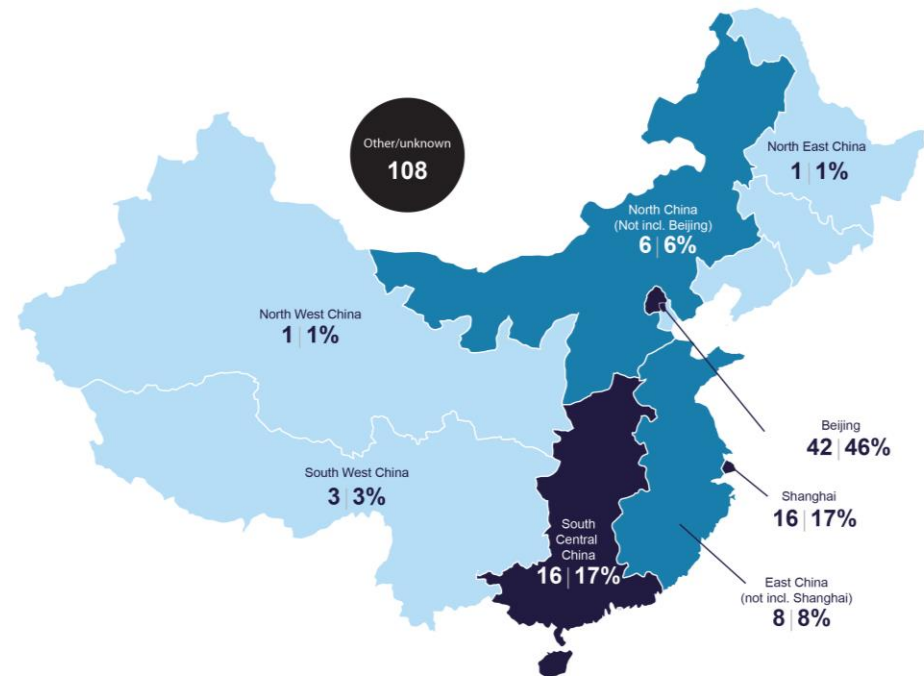


1.2 Visitor demographics: origin

Visits to the UK in (000) 2013

- Chinese visitors mainly come from the two major metropolitan areas: Beijing and Shanghai.
- Other main cities are also represented: 8% of visits originated in Guangzhou-Shenzhen-Dongguan, for example. Residents from top 2 and top 3 cities are also represented (3% of visits were made by people from Nanjing, 2% from Chengdu).
- Connectivity reflect these key Chinese source cities.

Visits in 000s | % share of visits

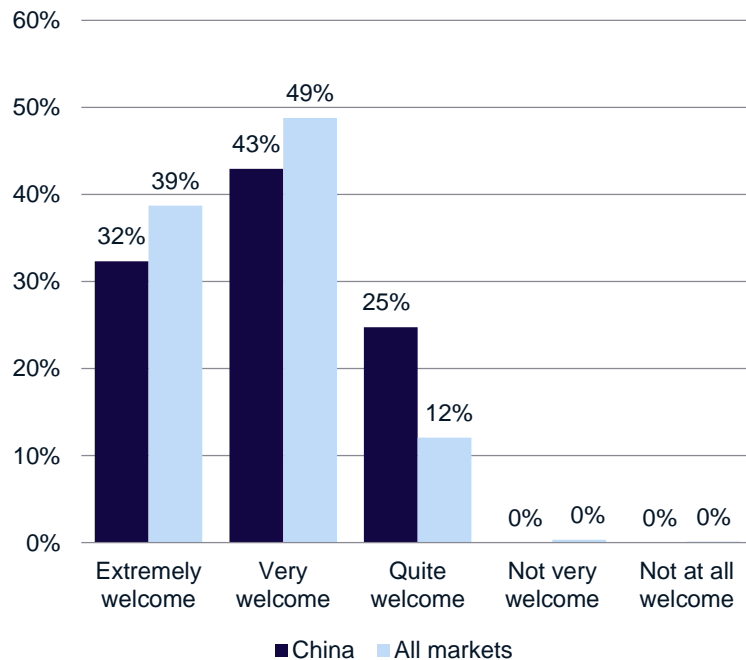


Source: International Passenger Survey by ONS

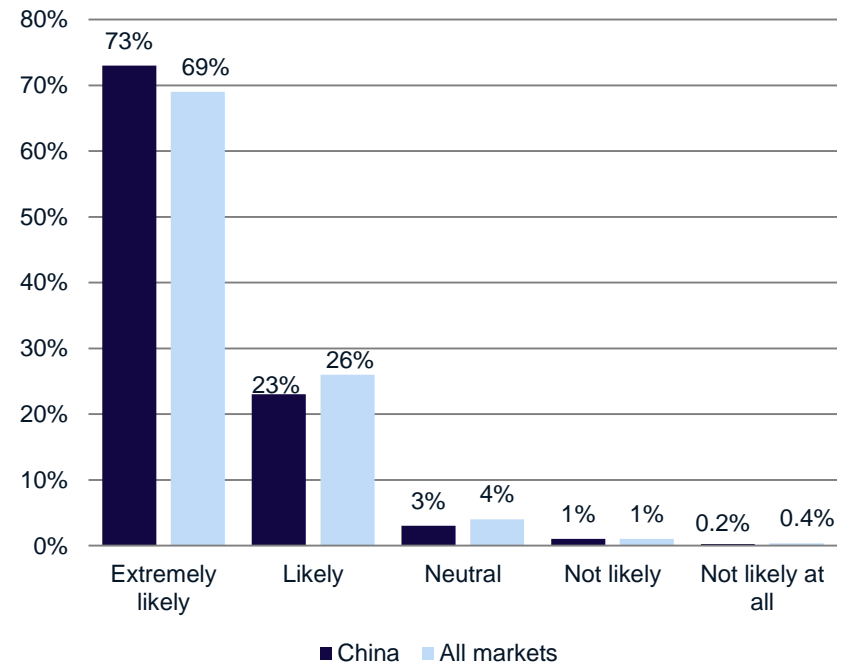


1.2 Visitor demographics: welcome and recommending Britain

Feeling of 'welcome' in Britain



Likelihood to recommend Britain



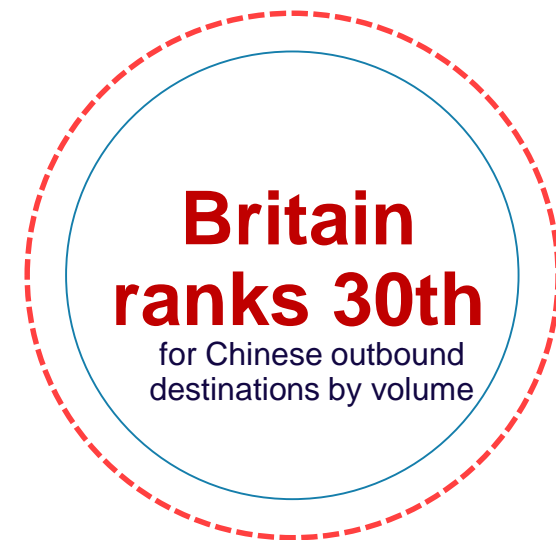
Source: CAA 2016, IPS 2015



1.3 Britain and competitors

Market size, share and growth potential

- The UK was the 30th most visited destination by Chinese residents in 2016.
- Forecasts suggest there is the potential for steady growth in the number of visits to the UK during the next decade.
- Of those who came to the UK for a holiday, 44% considered France, 31% Germany and 27% Italy as an alternative holiday destination.
- France is the most visited destination by the Chinese in Europe. However, it has lost some market share when compared to other destinations, and there were fewer visits from China in 2016 than in 2015. At that time, France might have been impacted by the recent terrorist attacks as safety is a key concern across Chinese international travellers.
- Overall more Chinese tourists are venturing long haul than before. The percentage share of visits to Northeast Asia is decreasing: from 65% of all outbound visits in 2011 to 55% in 2016.

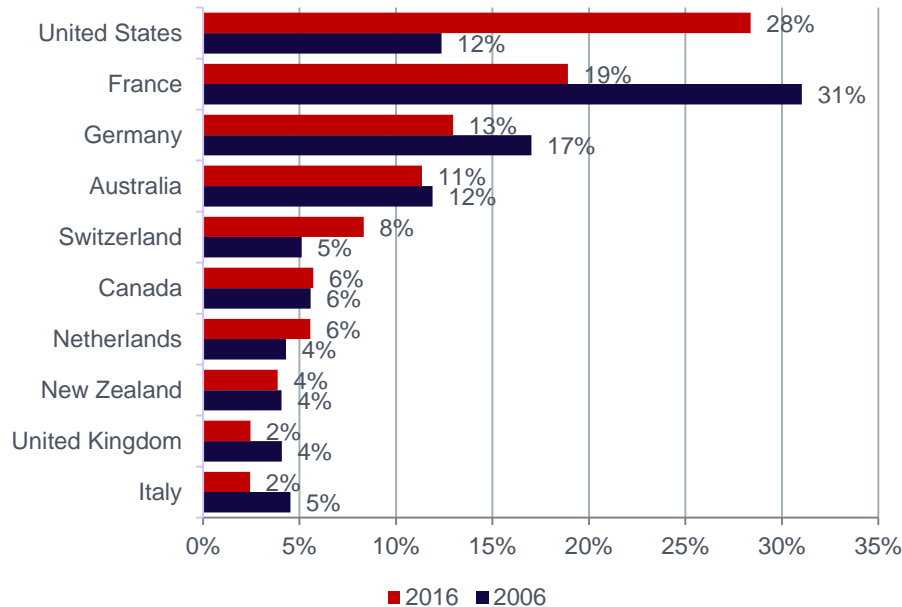


Source: Oxford Economics, VisitBritain/IPSOS 2016.

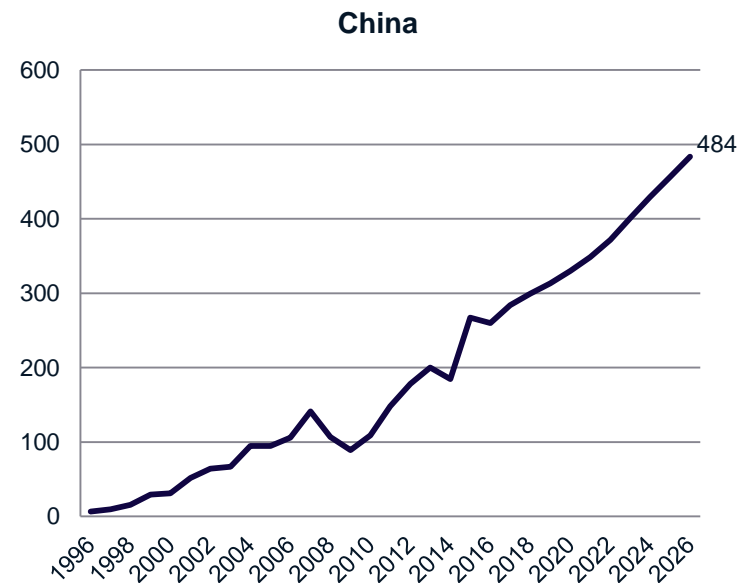


1.3 Britain and competitors

UK's market share of Chinese visits among competitor set



Historic and potential visits to UK (000s)



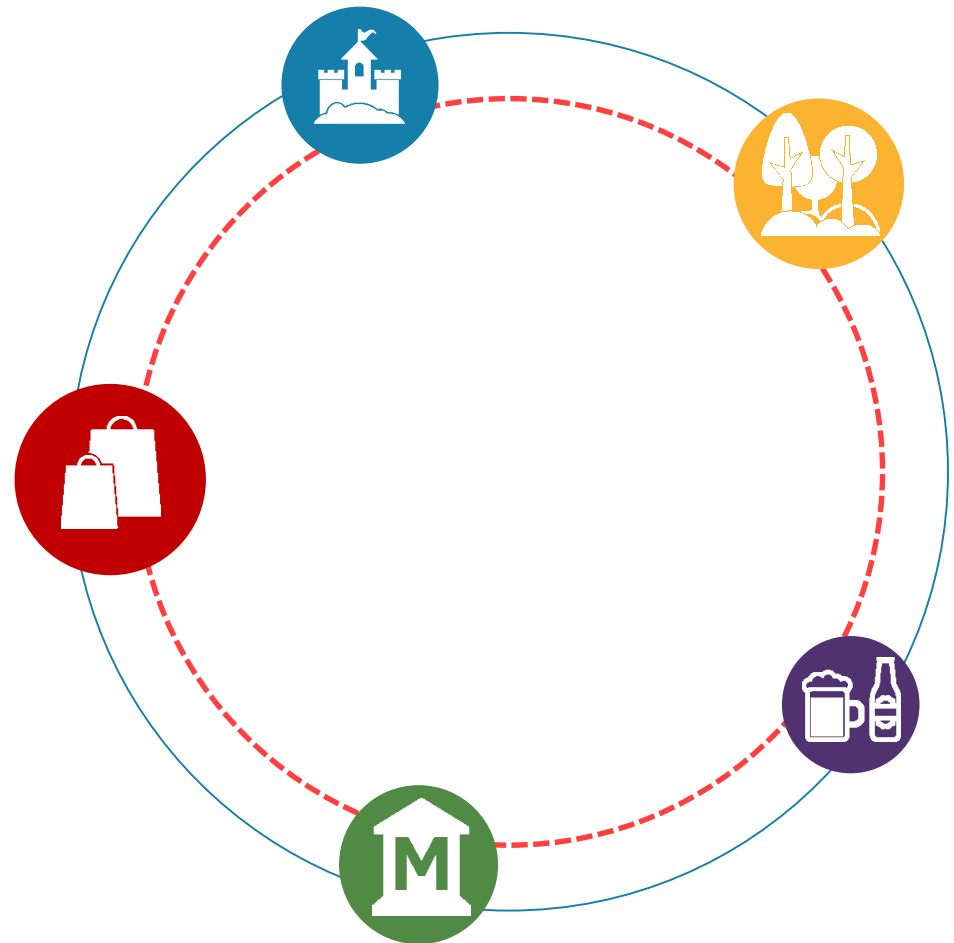
Source: Oxford Economics



1.4 Inbound activities

Inbound Britain

- Shopping is the number one activity which most Chinese visits will feature, followed by visiting parks or gardens, and museums or galleries.
- Built heritage sites, especially castles and historic houses, are important attractions for many visitors from China too.
- Chinese visitors are more likely than other visitors to go to a theatre, a show, live music event or a festival while in Britain.
- Walking in the countryside or by the coast is also more popular among Chinese visitors than the all-market average.
- The Chinese also have a special interest in British football teams.

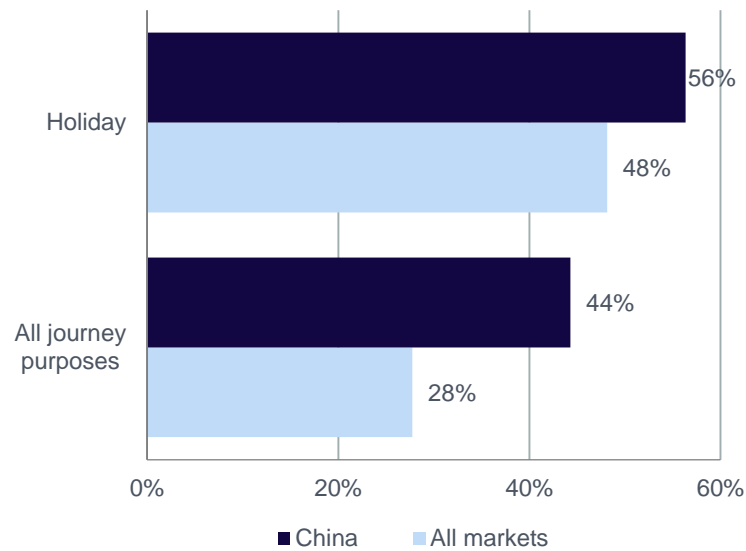


Source: International Passenger Survey by ONS

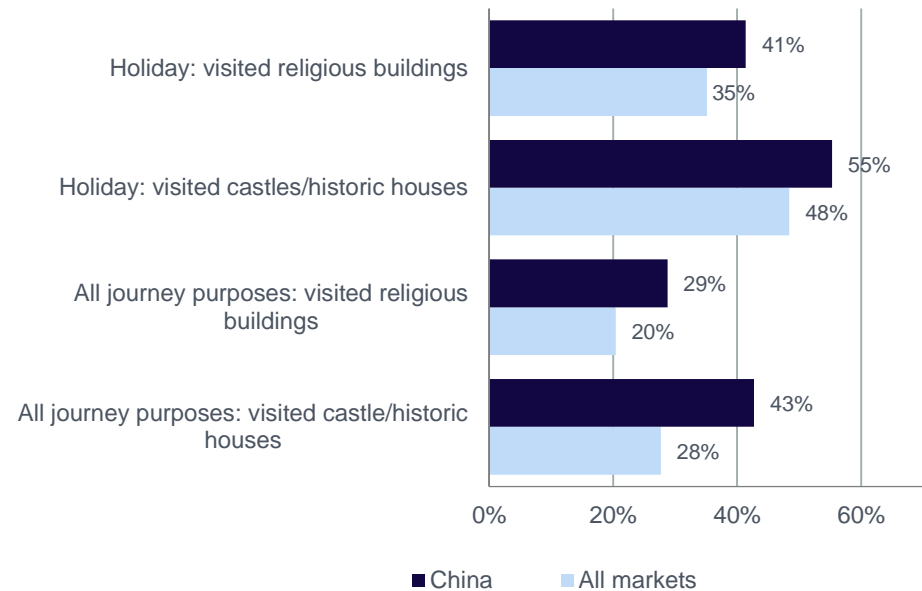


1.4 Inbound activities

Propensity to visit museums or art galleries



Propensity to visit built heritage sites

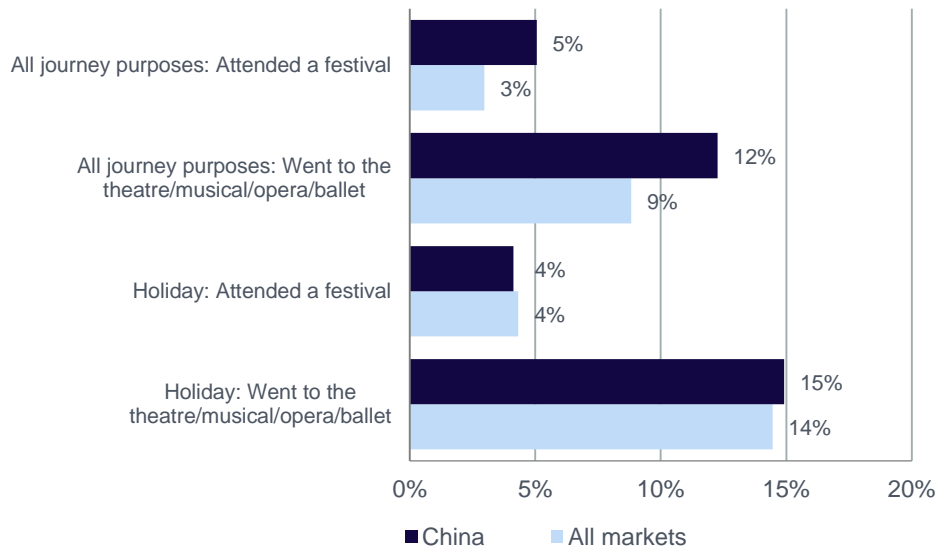


Source: International Passenger Survey by ONS (2016)

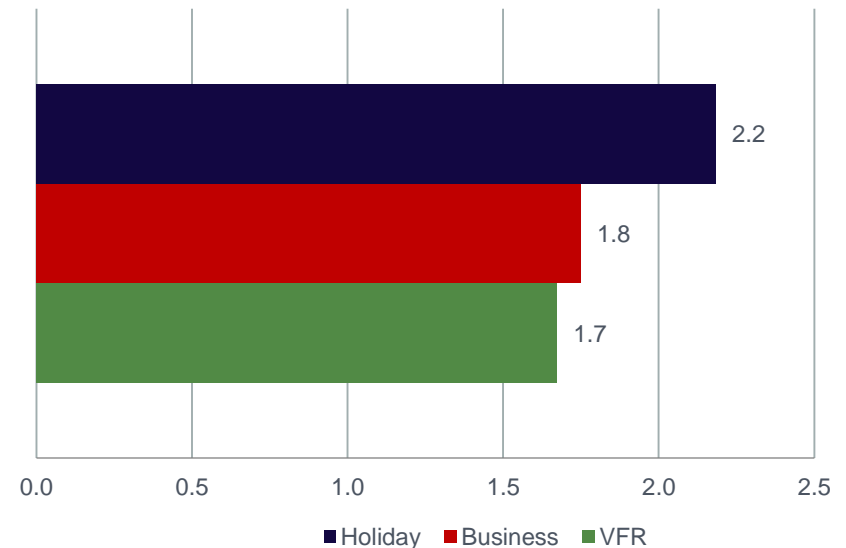


1.4 Inbound activities

Propensity to attend the performing arts



Number who went to watch football live during trip (000s)

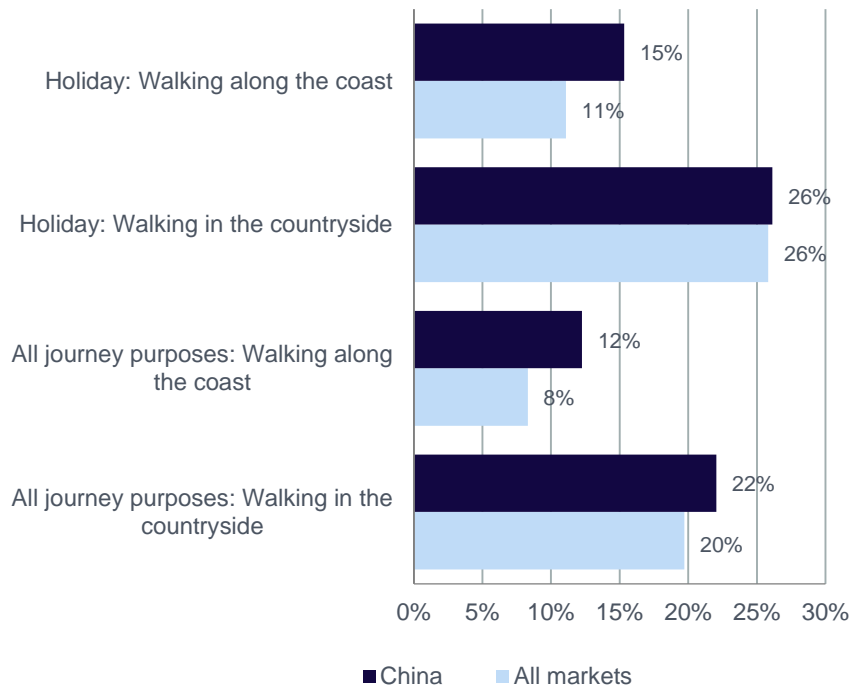


Source: International Passenger Survey by ONS

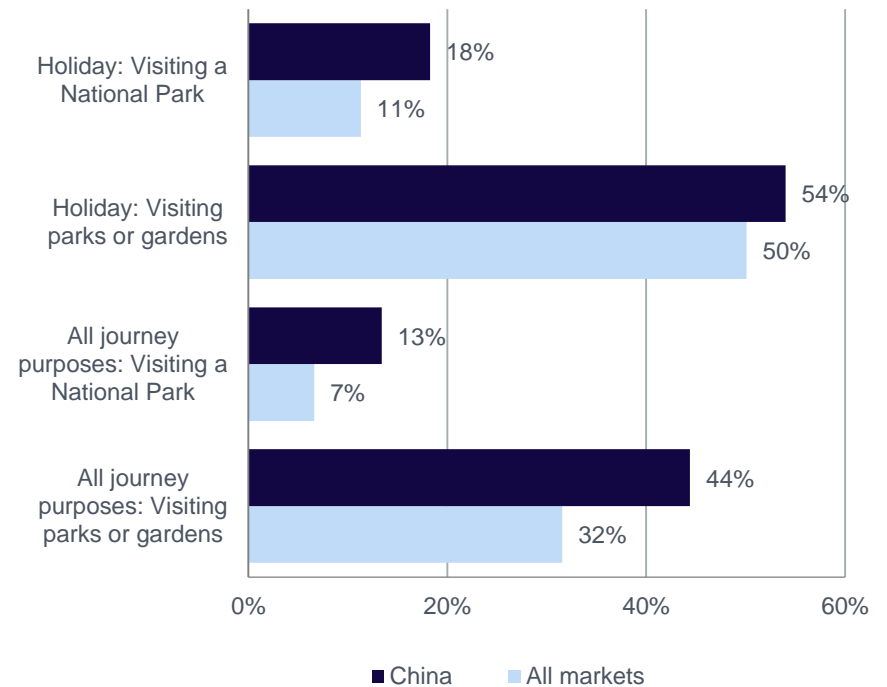


1.4 Inbound activities

Propensity to go for a walk along the coast or in the countryside



Propensity to visit a park/garden or a National Park

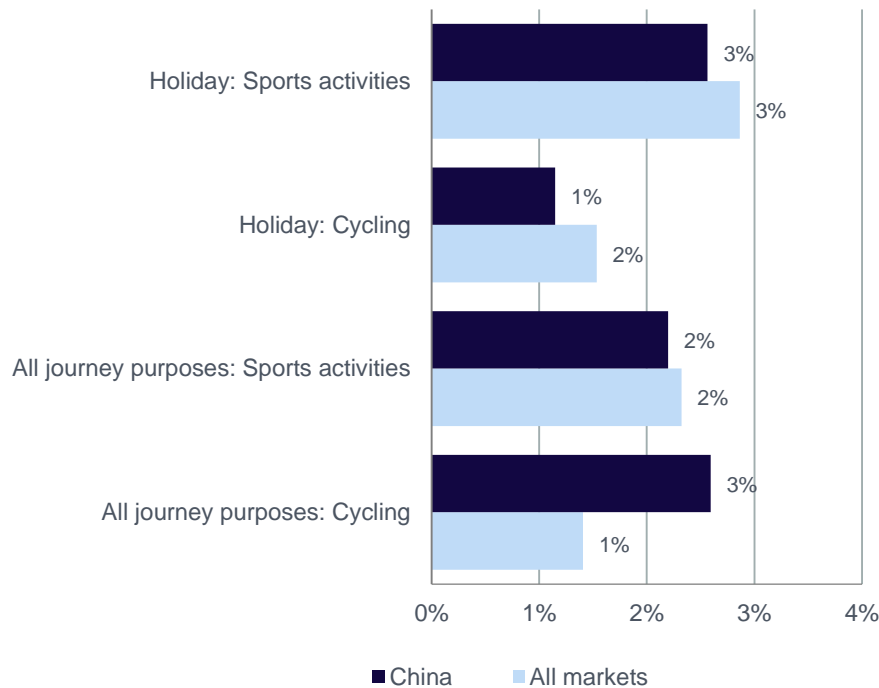


Source: International Passenger Survey by ONS (2007, 2010, 2016)

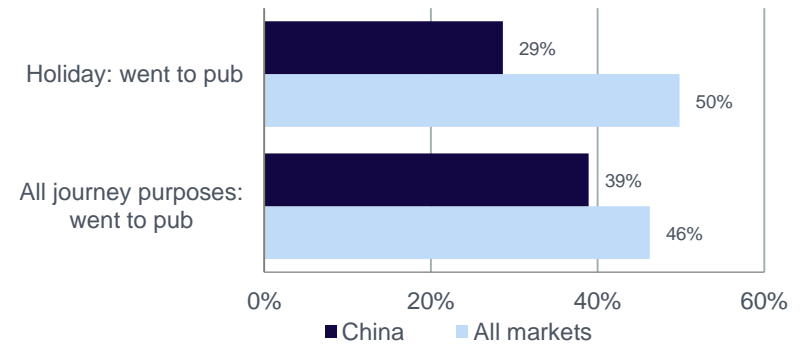


1.4 Inbound activities

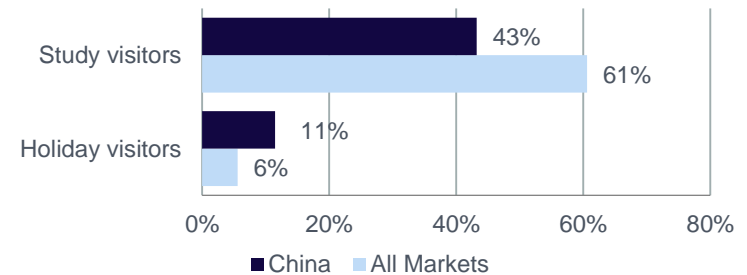
Propensity to go cycling or to take part in sports activity



Propensity to go to a pub



Propensity for visit to include an English language course

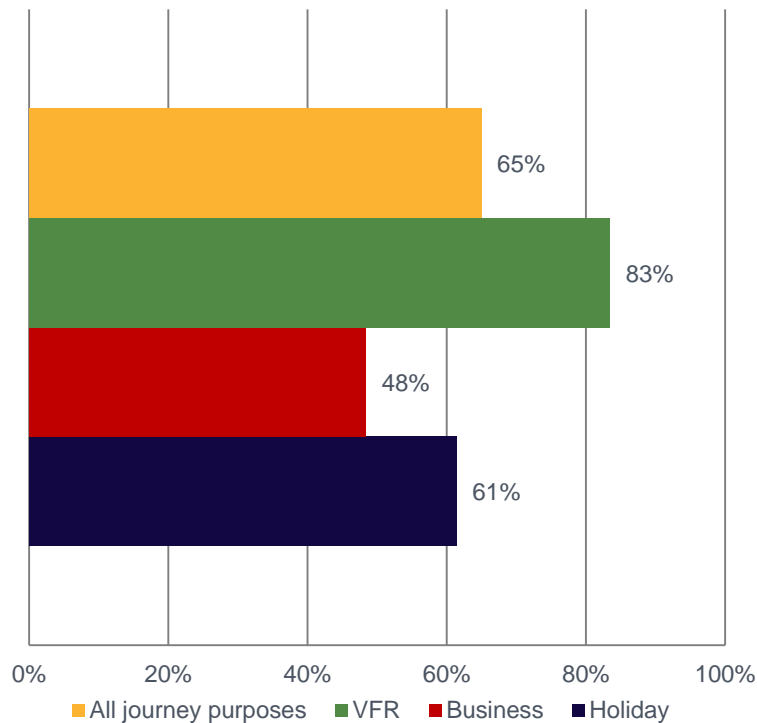


Source: International Passenger Survey by ONS



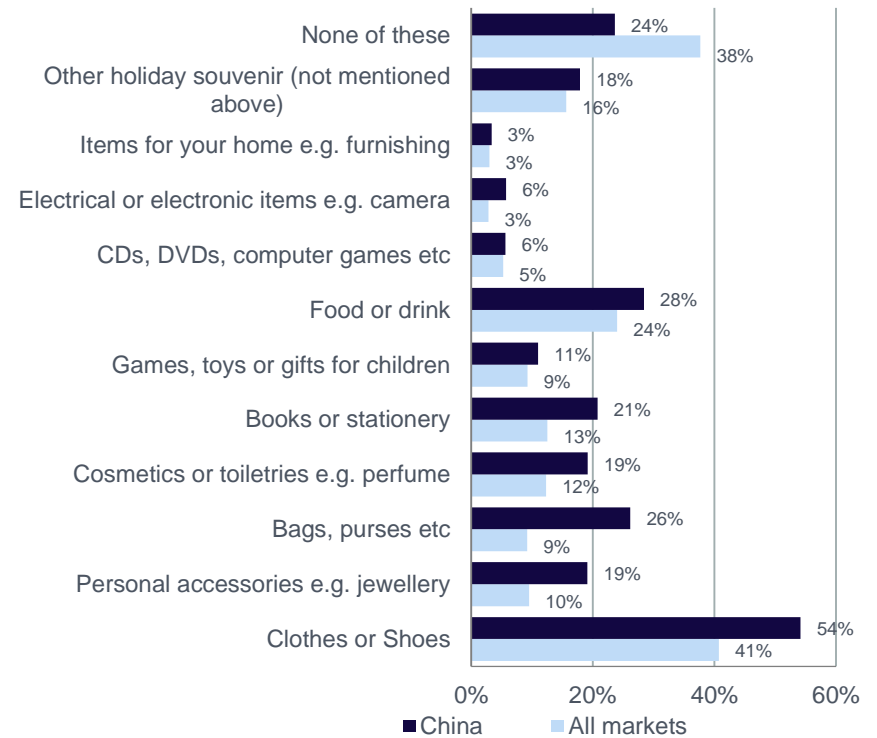
1.4 Inbound activities

Propensity to go shopping during visits to the UK



Source: International Passenger Survey by ONS

Propensity to purchase selected items





Chapter 2: Understanding the market

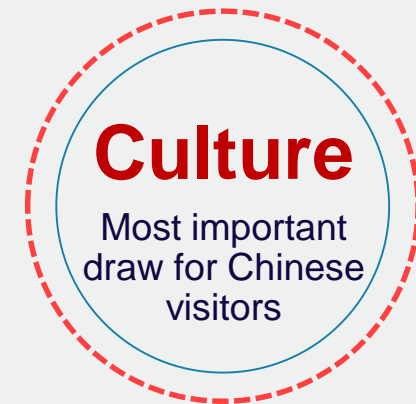




2. Understanding the market

Chapter summary

- China has the largest population in the world, with growing young middle and affluent classes. Most Chinese live in large urban areas.
- Hong Kong and Macao welcomed a third of Chinese outbound visits in 2016; Northeast and Southeast Asia accounted for 77%. However, Chinese middle and upper classes now explore destinations further away than ever before and this trend is set to grow.
- There are few public holidays in China, but going away is a key aspiration: it is an opportunity to show your social status and learn.
- They have a very short lead-in time: 61% of past visitors to Britain booked their trips 2 months to few weeks before their departure.
- Word-of-mouth is the most important influence on destination choice.
- The Chinese rate Britain highly for its cultural heritage and contemporary culture, associating Britain strongly with museums and films. They are mostly interested in symbolic elements: the Royal Family, Shakespeare, Sherlock Holmes, Harry Potter and Downton Abbey.



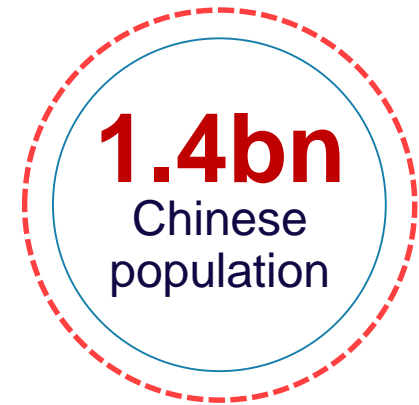
Source: World Bank, Oxford Economics, VisitBritain/IPSOS 2016, GfK Anholt Nation Brands Index 2016, VisitBritain/Olive Insight 2015



2.1 Structural drivers

Demographics & society

- With a population of around 1.4 billion, China is still the most populated country in the world. However, with an ageing population, it is set to be overtaken by India by 2030, and the population will start to decline.
- Standard Chinese or Mandarin is the nationwide official language. However some regions may use others, such as Cantonese (or Yue) which is Guangdong's official language.
- The Chinese economy is still growing rapidly. In 2015, for the first time, the number of High Net Worth Individuals (HNWIs, those with investable assets worth more than US\$1million) surpassed 1 million people.
- The rapid increase of Chinese urban income is expected to drive overall income growth. Spending is broadening beyond consumer staples: Chinese people now spend around 9.2% of their personal spending on “Fun”, which includes travelling.
- In 2014, it was estimated that only 4% of the Chinese population had a passport. By 2025, this number is expected to reach 12%.



Source: Oxford Economics, UN revised 2015 World Population Prospects, UN 2017 World Population Prospects, Capgemini World Wealth Report 2016, Goldman Sachs' 2015 Chinese consumer profile & 2015 'The Chinese Tourism Boom' report, CIA World Factbook 2017



2.1 Structural drivers: population and economic indicators

Population dynamics

Measure	2016 estimate
Total population	1,404,132,000
Overall growth rate vs. 2015	+0.5%

Indicator	1980	2015	2030
Fertility rate (over 5 years ending in...)	3.00	1.60	1.69
Median age	21.7	37.0	43.2

Economic indicators (% growth unless stated)

Indicator	2016	2017	2018
Real GDP	6.7	6.6	6.1
Consumer spending	8.0	7.2	6.9
Unemployment rate	4.0	4.0	4.0
Disposable income	8.6	8.5	8.6
Consumer prices	2.0	1.5	2.0

Source: Oxford Economics, UN revised 2015 World Population Prospects, UN 2017 World Population Prospects, CIA World Factbook 2017



2.1 Structural drivers: general market overview

General market conditions

- China is the UK's 24th largest source market in terms of visits and 12th most valuable for spend. The UK received the 'Approved Destination Status' (ADS) in 2005, making it possible for Chinese nationals to travel here more easily.
- The Chinese economy has dramatically changed over recent decades and the economy of the world's most populated country keeps growing. However, in recent years economic growth has slowed down from previous highs and tier 2 and tier 3 cities have been largely helping to sustain the real estate market.
- McKinsey's 'Urban World: Global Consumers Report' predicts that Beijing and Shanghai are set to have among the largest rates of consumption growth between 2015 and 2030. Guangzhou and Shenzhen are also on McKinsey's Tier 1 in terms of household consumption of services in China. Tianjin, which now offers direct, stopping flights to the UK, is also quoted as a key city for consumption growth.
- Capgemini's World Wealth Report suggests that in 2015 Chinese HNWI's (High Net Worth Individuals) surpassed 1 million people for the first time, up 16% on 2014 to 1,034,000 HNWI's, meaning that it ranks in 4th place behind the US, Japan and Germany.
- The Chinese population is set to increase slightly until 2030 when it is forecast to start decreasing. The fertility rate in China is indeed under the threshold for population renewal, as a consequence of the one-child policy, although this was softened in 2013. The Chinese population is also showing signs of ageing, with a median age above the global and Asian averages.

Key demographic and economic data

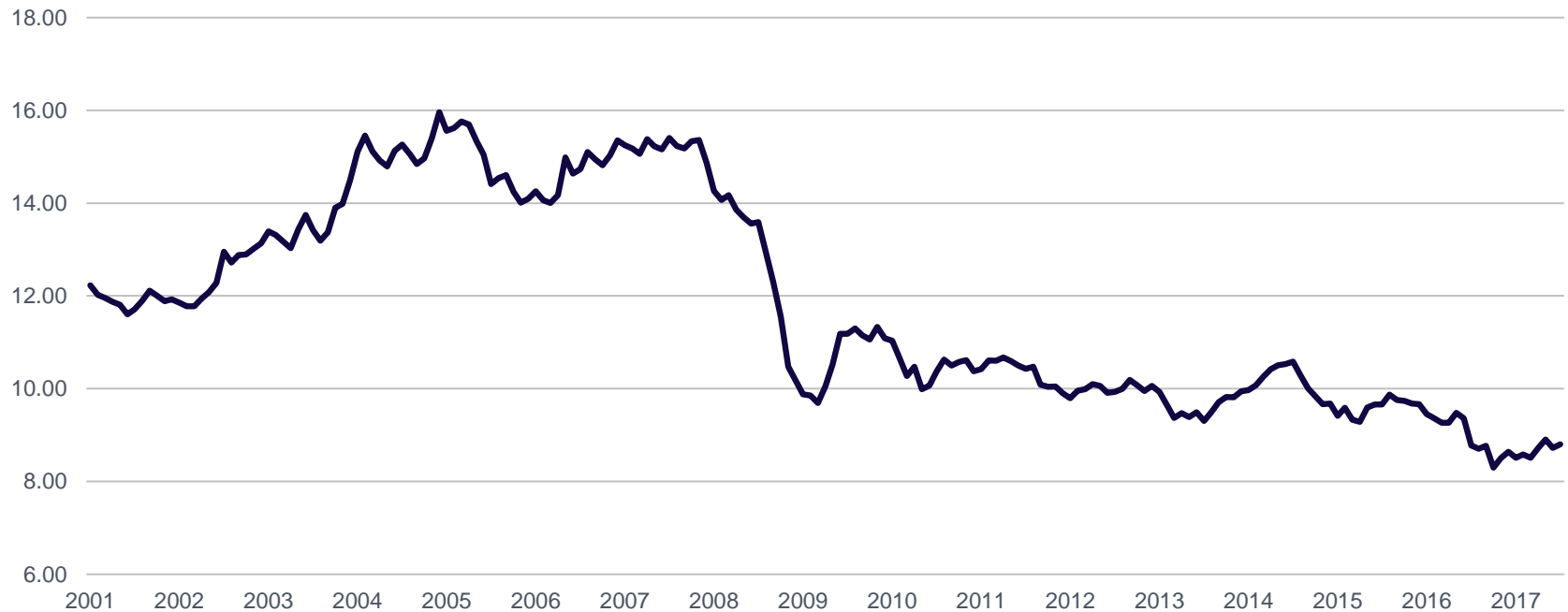
Measure (2016 data)	China
Population (m)	1,404
GDP per capita PPP (US\$)	13,802
Annual average GDP growth over past decade (%)	9.0
Annual GDP growth in 2016 (%)	6.7

Source: Oxford Economics, UN revised 2015 World Population Prospects, UN 2017 World Population Prospects, Capgemini World Wealth Report 2016, McKinsey's 'Urban World: Global Consumers Report' (April 2016)



2.1 Structural drivers: exchange rate trends

Exchange rate trends (cost of GBP in CNY)



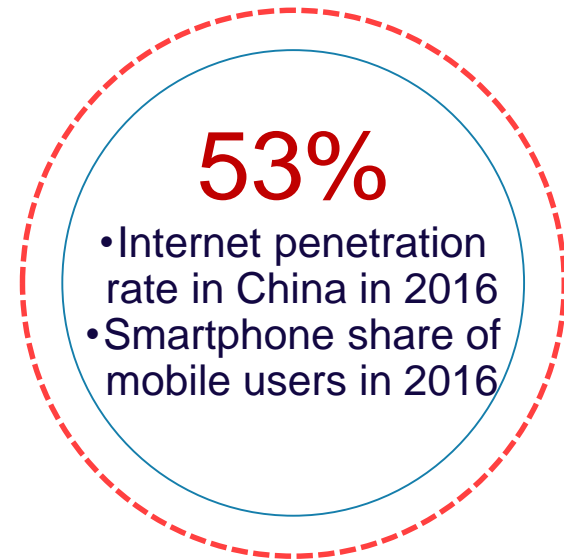
Please find the most up-to-date exchange rate trend based on monthly averages at visitbritain.org/visitor-economy-facts.

Source: Bank of England



2.2 Consumer trends

- More and more Chinese people have access to travel: the growing urban middle-class lead this trend. Goldman Sachs' estimates reveal that about 4% had a passport in 2014, but this is forecast to reach 12% by 2025. This means that around 150m Chinese people would be able to travel to other outbound destinations than Macao and Hong Kong.
- As Chinese travellers are getting more like their Western counterparts, new trends emerge. With new visa-free destinations or easier application processes, the FIT segment is growing. Family travels, experiences and winter sports are also gaining momentum.
- Use of internet in China is booming: according to the CNNIC, as of December 2016 there were 731m Internet users in China, up 43% on 2011 and up 434% on 2006.
- 53% of mobile users in China were using smartphones in 2016.
- Travel mobile apps are especially appreciated among the Generation Y luxury travellers: 35% will use WeChat shares by travel advisers as their travel information source, and 37% apps' push messages.



Source: Goldman Sachs' 2015 Chinese consumer profile, COTRI for China Daily and Forbes, Switzerland Tourism for TrekkSoft, CNNIC's 39th report (January 2017), Statista.com, 2016 Chinese Luxury Travellers by Marriott and Hurun Report.



2.2 Consumer trends: overall travel trends

Motivation and attitudes to holidays

- China's outbound market is booming. There were over 85m international visits made from China in 2016, making it the third largest market in volume of international arrivals after the US and Germany. It is forecast to overtake Germany by 2021.
- The rising urban middle class in China is primarily responsible for the growth of the outbound travel market. In 2013, about 11% of China's population could be considered as part of the middle class. With 9% of Chinese personal spending going on recreational activities, spending on 'fun' activities, which includes travel, is much lower than in other countries. However, the young urban mass affluent segment that is set to grow in the coming years are already the ones spending more on those activities, making a sizeable growth opportunity for the Chinese outbound market.
- To support that growth in international visits, more and more Chinese people are becoming passport owners: from 4% in 2014 to 12% by 2025, according to Goldman Sachs.
- Approved destination status countries have multiplied, enabling the Chinese to travel to newer destinations. Every year, more countries are changing their access rules for Chinese travellers in order to tap into the world's most valuable outbound market. At the end of 2015, 45 countries were already granting visa-on-arrival for Chinese tourists.
- Ahead of the 2018 EU-China tourism year, European countries, including the UK, Italy and France, have followed this trend and have lowered the threshold for the approval of certain visas and simplified the visa issuing procedure to attract more Chinese tourists.
- Among the most valuable tourists from China are the young (born after 1980), affluent Chinese travellers. The 2016 Hurun report shows that Europe was their most visited tourist destination in 2016 and is set to remain so for the next three years.

Source: Oxford Economics, UNWTO, Goldman Sachs' 2015 Chinese consumer profile & 2015 'The Chinese Tourism Boom' report, COTRI, China Daily, 2016 Chinese Luxury Travellers by Marriott and Hurun Report.



2.2 Consumer trends: overall travel trends

Travel trends among Generation Y luxury travellers

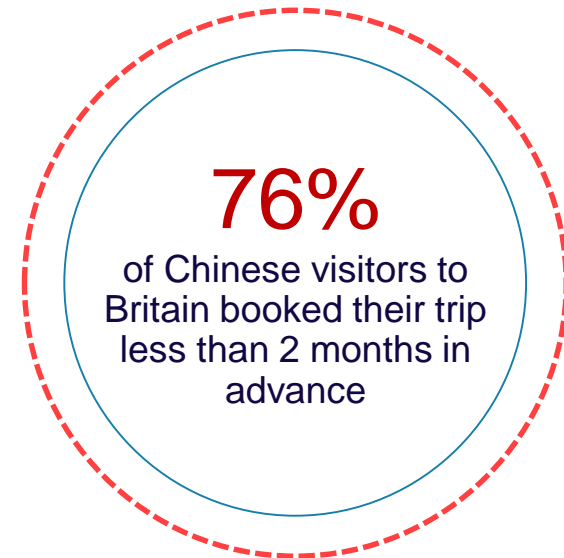
- According to Marriott/Hurun, luxury travellers aged 18-36 would spend RMB420,000 on travel per household on average (about £47,740). In the coming years, exploring the world, going on an adventure, a cruise, a polar exploration, or a road trip will become more popular: they like experiences they can brag about. But in 2015 shopping was still an important part of their travel experience representing over half of their travel spending.
- In 2015, 82% of this group travelled for leisure. Other key travel motivations include exploring the world (40%), going on an international cruise (26%) or an adventure trip (23%).
- They also travel abroad for other motives than leisure: leisure holidays only represented 69% of their time abroad in 2015 (17 days of their 25 days abroad on average).
- They are experienced travellers: they have already visited 13 countries on average. In 2015, 61% of them went to Europe. The UK was their 11th most visited destination and their 7th most memorable destination. France is usually preferred as a shopping destination, however. Japan and Australia are also among their favourite destinations.
- For 36% of these young luxury travellers the National Day Golden Week that takes place at the beginning of October is their favourite time to travel – reaffirming the opportunity offered by this week-long public holiday time in China. The Chinese New Year is also becoming more of a travel period for those affluent travellers who have a family.
- Travelling with family and friends is indeed a growing trend: 89% of those interviewed quoted that as their most memorable experience. Friends also play an important part in the choice of the destination as 40% of the respondents to the Hurun survey were inspired to travel by their friends, just ahead of online sources of information (36%), travel agencies (34%) and their family (33%).
- 70% of them will prefer using the services of a travel agency for the personalised services they offer, 57% for their expertise, and 54% for itinerary planning.
- However, online booking methods have also become more popular: 41% booked their hotels through a third-party reservation website, 30% via a travel agency and 25% on the hotel website. This also shows how those travellers are becoming more independent in arranging their travel details.

Source: 2016 Chinese Luxury Travellers by Marriott and Hurun Report.



2.3 Booking and planning

- Chinese travellers have a very short lead-in time: 61% of past visitors to Britain booked their trips 2 months to few weeks before their departure.
- However 53% had decided to visit Britain over 3 months before their date of travel.
- They are more likely than average to plan their trip with precision before leaving their country.
- When travelling to Britain, they would prefer to book travel and accommodation together, mostly online.
- They would also be more likely to purchase tickets for their activities before they travel.

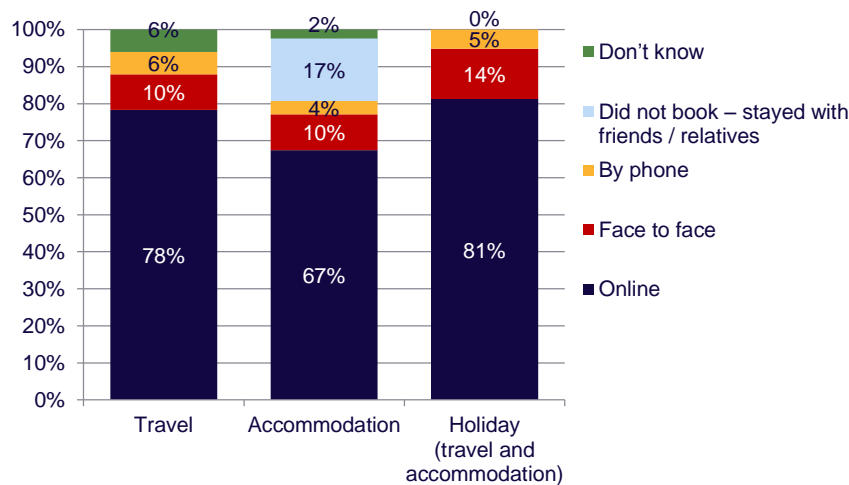


Source: VisitBritain/IPSOS 2016



2.3 Booking and planning: booking channels and ticket sales

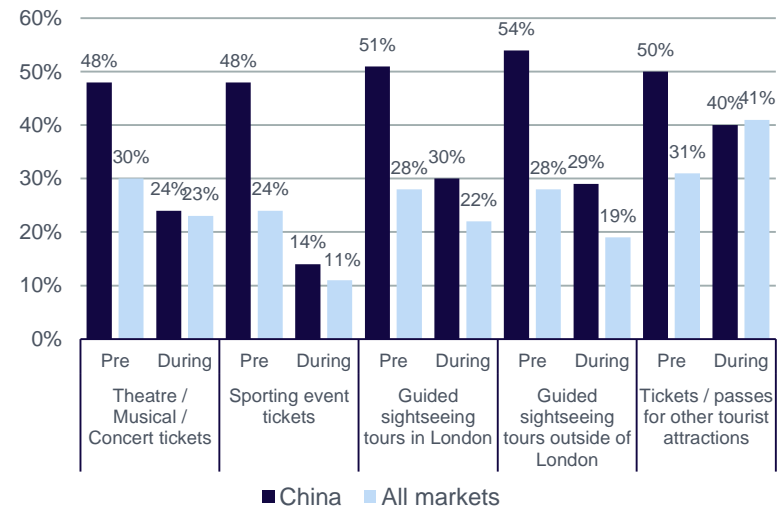
How trips to Britain were booked



- Online bookings are the Chinese travellers' favourite booking methods when arranging their travel to Britain.
- Chinese visitors to Britain still tend to book their travel to Britain and accommodation together (71% of visitors).
- Among those who booked them separately, the Chinese share of visitors who stayed with friends or relatives is on par with the all-market average.

Source: VisitBritain/IPSOS 2016, base: visitors (if not otherwise specified). Online survey.

Propensity to make a purchase before or during trip

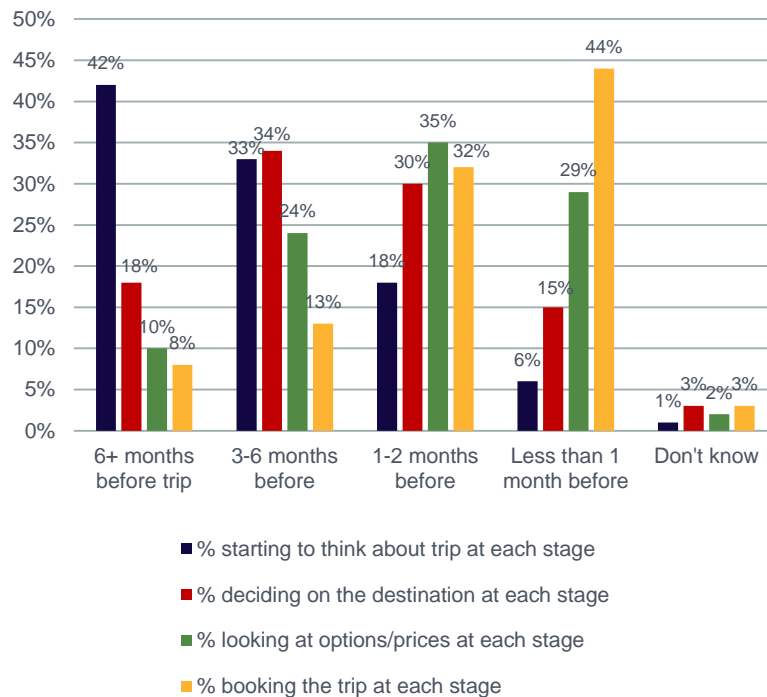


- Chinese visitors tend to book their various travel elements before they start their journey, especially for guided sightseeing tours and tickets to other tourist attractions.
- 89% of Chinese international travellers tend to plan their holiday abroad carefully before they leave China, which is above the all-market average (70%).



2.3 Booking and planning: lead-times

Decision lead-time for visiting Britain



- The Chinese tend to think about a trip to Britain fairly early as 42% of visitors to Britain started to think about it more than six months before the trip. An additional 33% did so in the three to six months window before the trip.
- Just over half had decided to travel to Britain either three months before their trip or earlier. This is below the all-market average, showing the short lead-in time of Chinese travellers to Britain.
- They would also start looking at options and prices for their trip to Britain later than the all-market average with a third doing so 3 months or more in advance of their trip, about another one in three 1-2 months before and the rest less than 1 month before.
- Finally, 76% of Chinese past visitors to Britain had booked their trip less than 2 months ahead.
- Booking through a travel agent, tour operator or travel comparison website is usually preferred to booking directly with the carrier/provider, whether Chinese visitors to Britain chose to book travel and accommodation together or separately.

Source: VisitBritain/IPSOS 2016, base: visitors



2.4 Reaching the consumer

- Talking to friends, relatives and colleagues is the key source of influence for Chinese travellers trying to decide on their holiday destination.
- Travel agent or tour operators – whether through direct advice or via websites – have almost as much influence as word-of-mouth.
- Travellers' destination reviews on websites completes the Chinese top 3 influences.
- Compared to other markets, the Chinese travellers tend to be more influenced by TV travel programmes, TV adverts, and also their traditional travel agent or tour operator through discussions or their brochures.



Source: Oxford Economics, VisitBritain/IPSOS 2016.



2.4 Reaching the consumer: traditional media

The Chinese are highly exposed to media and increasingly media driven overall



Broadcast media



- Most households own a TV set. There are over 3,300 local, regional and national TV channels in China, and over 2,600 radio stations. The latter ones are all state-owned.
- Main radio broadcaster include China National Radio and China Radio International. The biggest TV players are:
 - China Central TV (CCTV), largest broadcast media in China with national coverage, state-run and based in Beijing but with overseas offices, including in London.
 - China Global TV Network (CGTN), a state-run international broadcaster with networks in 5 other international languages, including French and English.
- Regional TV stations, with support of satellites, are gaining more popularity with a focus on lifestyle and entertainment programmes.
- China is also the largest cable TV market in the world with over 216m subscribers.
- Main players are Tencent, Baidu, LeTV. Most traditional TV channels and radio stations have to face the competition of streaming and OTT companies, like iQiyi, Youku, Tudou and Sohu.



Print media



- China is the third largest publishing sector for exporters, after the US and Germany. However, it is very fragmented with around 1,900 newspapers.
- There are also over 40 major press conglomerates publishing 100 million copies of newspapers every day. There are over 10,000 magazines across China.
- However it is mostly state-controlled: city newspapers are usually owned by local government or the local Communist Party. Sensitive information is monitored and can eventually be censored. However tourism information is not considered sensitive. Depending on the city, or region, press is more or less censored.
- Magazines are getting more specialised in their own niches. Trends Travellers, World Traveller and National Geographic Traveller are amongst top tourism magazines in China.
- Again online support is challenging the market situation as many of them are being digitised to gain more market share and penetration. China Daily, an official English-language paper is a good example of that.

Source: BBC's China profile - Media, AHK China, 2016 ITA Media and Entertainment Top Markets Report



2.4 Reaching the consumer: online media



Internet use

- China is the world's largest online population with 731m of Internet users and an adoption rate of 53%.
- A system nicknamed the "Great Firewall of China" can block access to foreign or domestic websites, filtering URLs or censoring some keywords.
- Three main players are known as "BAT":
 - Baidu: top search engine
 - Alibaba: e-commerce leader, allied with Sina which operates the Weibo microblog platform
 - Tencent: WeChat instant message platform
- According to CNNIC, 41% of Internet users use the Internet for travel booking (as of 2016). This represents a 15% increase on 2015 levels.

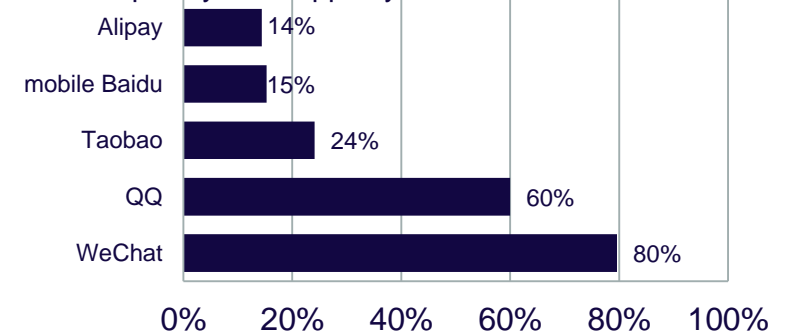
Mobile predominance:

- The CNNIC says 92.5% of China's online population can access the internet via a smartphone.
- Mobile payments is getting more and more popular in China, especially among the millennials.

Social media

- The Chinese social media landscape is very unique. Many international players like Facebook are blocked in China. The main actors are local, and usually either messaging, blogging or microblogging services.
- Among the messaging apps and platforms, the most popular are:
 - WeChat with 762m monthly active users as of Q1 2016, 846m by the end of 2016.
 - Tencent's QQ with 877m monthly active users as of Q1 2016.
- Popular blog platforms include WeChat Moments, Weibo and Tencent.

Most frequently used apps by netizens in 2016

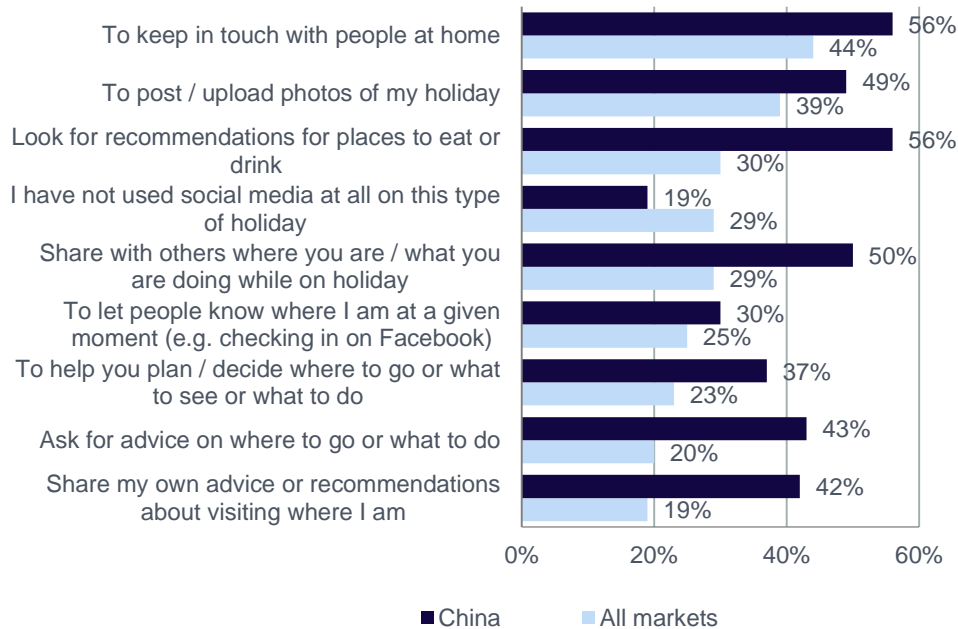


Source: BBC's China profile - Media, AHK China, CNNIC's 39th report (January 2017), Kantar Media CIC's 2017 China Social Media Landscape



2.4 Reaching the consumer: social media on holiday

Use of social media on holiday



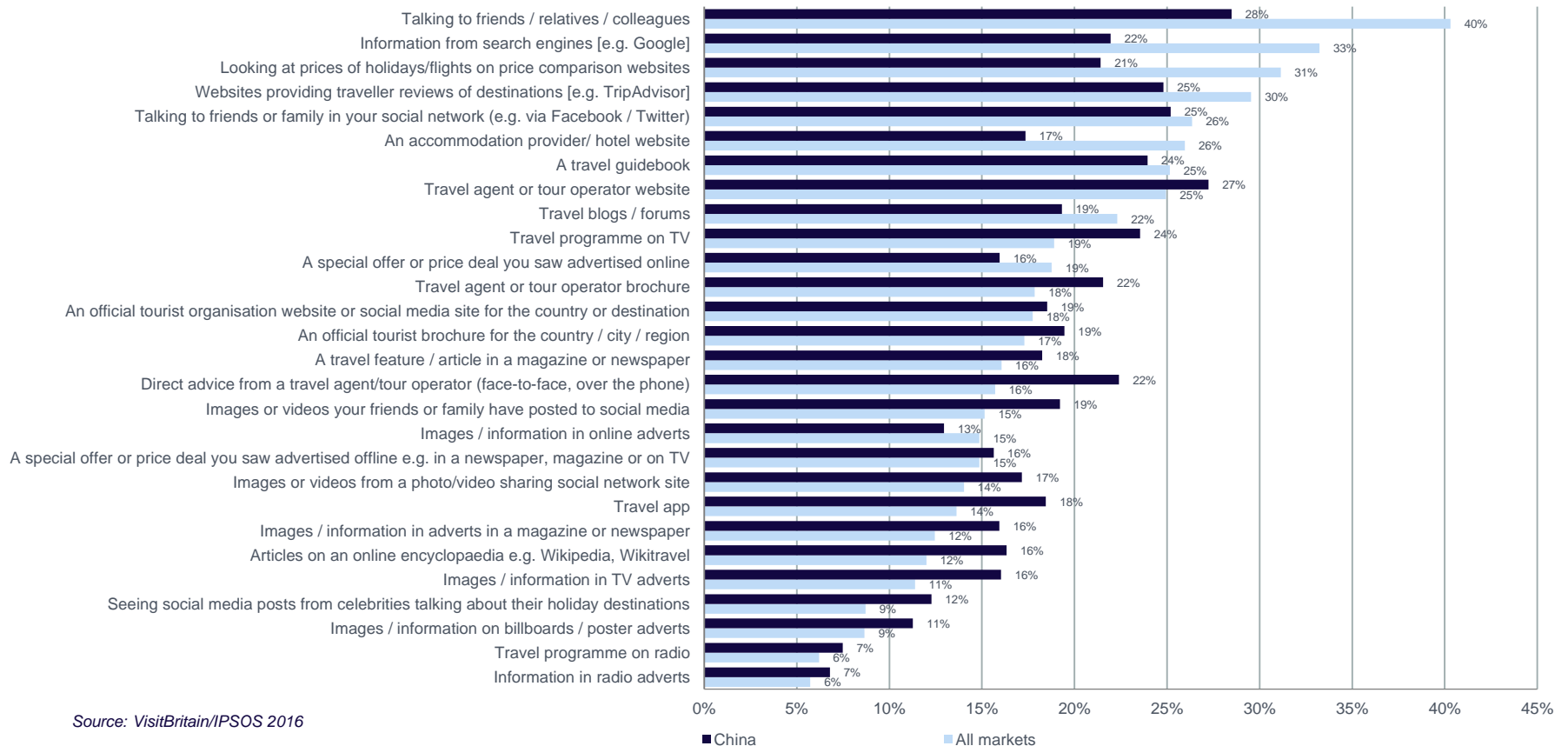
- Chinese travellers tend to use more social media on holidays than the all-market average: only 19% of Chinese international travellers have not used social media during their last holiday abroad, compared to 29% across all markets.
- The Chinese social media market is dominated by local actors. WeChat, Youku and Weibo are among the most used social media platforms.
- 88% of Chinese international travellers regard their smartphone as essential whilst they are on holiday, and 65% their tablet.
- 82% of Chinese travellers like to be able to stay connected when they are on holidays, with 87% wishing it were cheaper to use their smartphone abroad.
- While on holiday, the Chinese tend to use more social media than the average international traveller, especially when finding or sharing recommendations on where to go to eat, drink or visit.

Source: VisitBritain/IPSOS 2016, base: all respondents.



2.4 Reaching the consumer: influences

Influences on destination choice



Source: VisitBritain/IPSOS 2016



2.5 Perceptions of Britain

- The Chinese rate Britain highly overall, and in particular for tourism, built heritage, contemporary culture and its vibrant city life. However, their perceptions of the British scenic natural beauty and welcome are weaker: they ranked Britain 15th and 19th out of fifty nations respectively on these two attributes.
- Museums, films and opera are the cultural products or services most strongly associated with Britain by the Chinese.
- Chinese travellers would mostly expect a trip to Britain to be 'fascinating'. They are also much more likely to consider it 'romantic', 'relaxing' or 'spiritual' than the global average.
- Australia and France are the destinations that the Chinese consider the 'best place' for delivering many of the aspects they want from a holiday destination.
- Areas of strength for Britain include the ease of getting around the country as well as its historic sites.



Source: GfK Anholt Nation Brands Index 2016, Arkenford 2013



2.5 Perceptions of Britain

Britain's ranking (out of 50 nations)

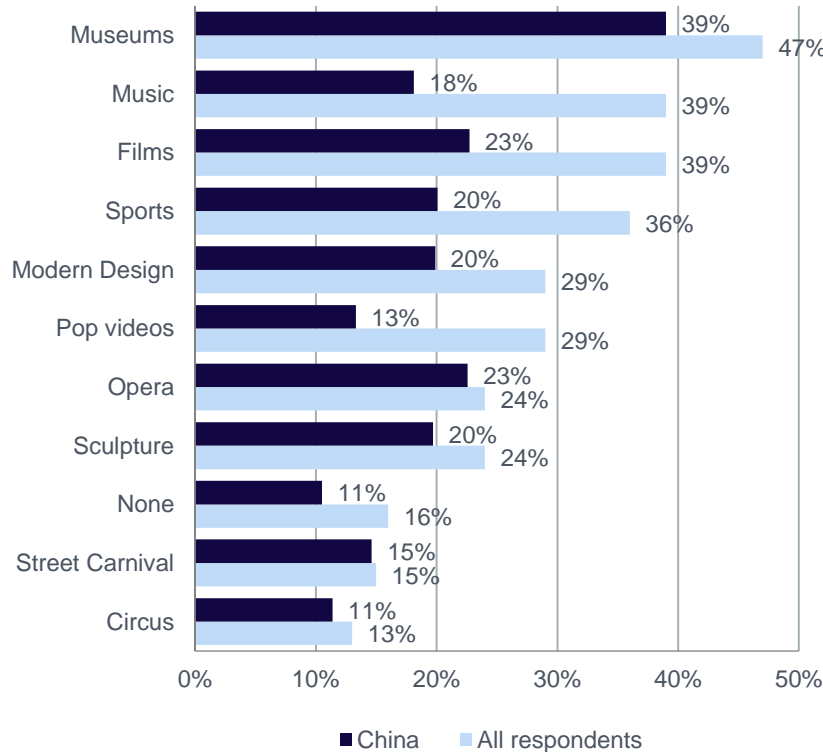
Measure	Chinese respondents	All respondents
Overall Nation Brand	3	3
Culture (overall)	4	5
The country has a rich cultural heritage	3	7
The country is an interesting and exciting place for contemporary culture such as music, films, art and literature	4	4
The country excels at sports	5	5
People (overall)	10	7
If I visited the country, the people would make me feel welcome	19	12
Tourism (overall)	3	5
Would like to visit the country if money was no object	3	5
The country is rich in natural beauty	15	24
The country is rich in historic buildings and monuments	5	5
The country has a vibrant city life and urban attractions	4	4

Source: Anholt-GfK Nation Brands Index 2016

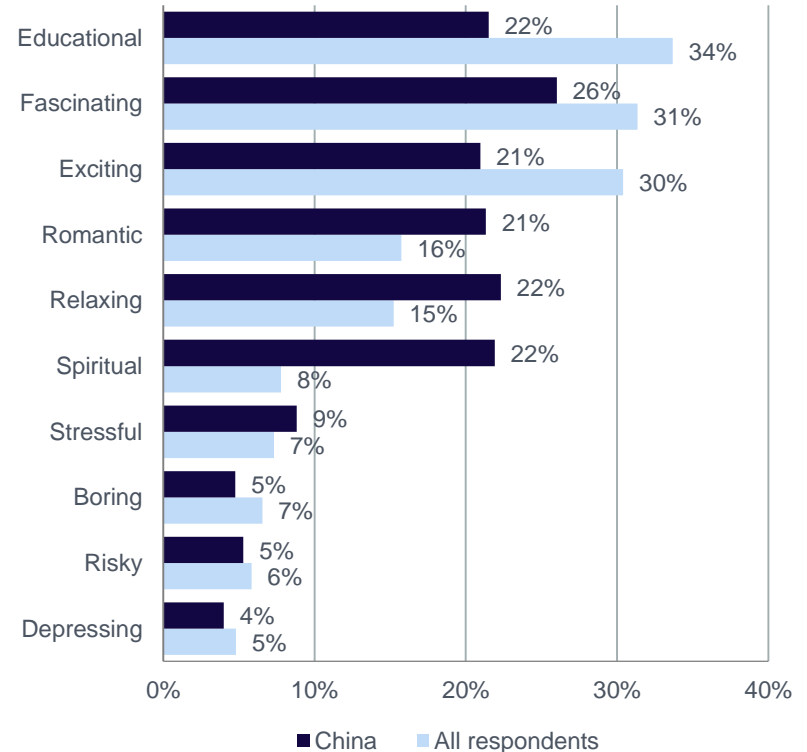


2.5 Perceptions of Britain

Cultural associations



Adjectives describing a potential trip to Britain



Source: GfK Anholt Nation Brands Index 2016



2.5 Perceptions of Britain

Holiday wants and % saying destination is best place for...

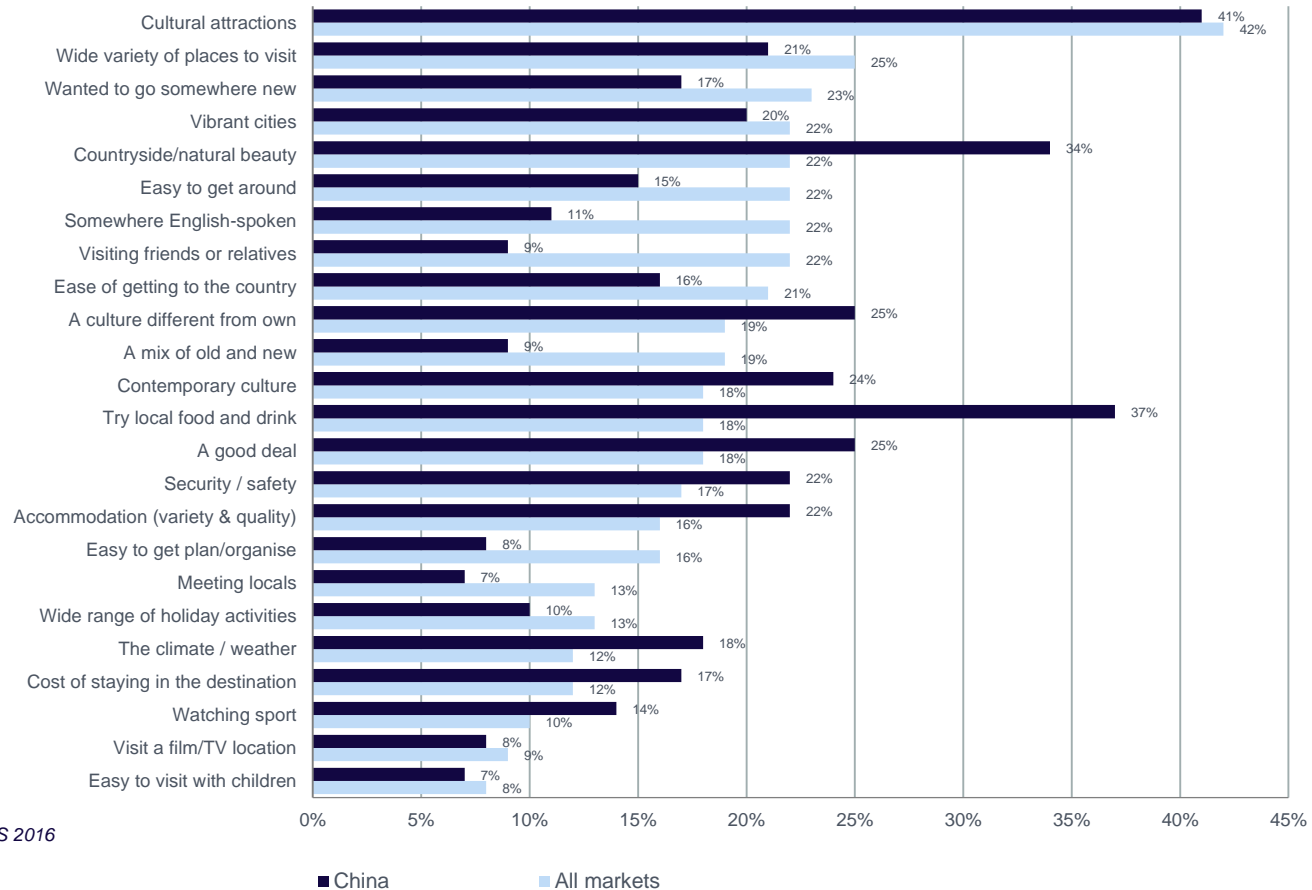
Importance		GB	FR	IT	AU	US	GE
6.44	Enjoy the beauty of the landscape	25%	48%	47%	64%	35%	23%
6.42	Feel connected to nature	15%	26%	22%	66%	34%	20%
6.40	Have fun and laughter	15%	35%	15%	70%	23%	18%
6.38	Chill/ slow down to a different pace of life	26%	50%	33%	62%	30%	16%
6.38	Be physically healthier	30%	44%	35%	66%	40%	27%
6.35	See world famous sites and places	46%	62%	58%	49%	46%	29%
6.32	Soak up the atmosphere	23%	44%	35%	55%	23%	26%
6.24	It offers unique holiday experiences	39%	56%	50%	63%	43%	34%
6.23	Enjoy peace & quiet	28%	40%	28%	66%	24%	24%
6.23	Offers good value for money	36%	52%	43%	60%	42%	32%
6.21	Experience activities/places with a wow factor	33%	47%	35%	54%	46%	21%
6.19	Experience things that are new to me	29%	55%	45%	59%	37%	24%
6.17	Enjoy local specialities (food and drink)	29%	70%	69%	39%	28%	28%
6.15	Get some sun	31%	48%	37%	73%	34%	20%
6.14	Visit a place with a lot of history/historic sites	48%	73%	64%	22%	21%	28%
6.14	Enjoy high quality food and drink (gourmet food)	23%	67%	61%	24%	38%	19%
6.14	Provides a wide range of holiday experiences	37%	54%	45%	59%	52%	31%
6.09	The people are friendly and welcoming	33%	49%	42%	54%	40%	32%
6.08	Do what I want when I want spontaneously	28%	26%	17%	27%	15%	11%
6.08	Broaden my mind/ Stimulate my thinking	32%	61%	40%	48%	51%	33%
6.07	Do something the children would really enjoy	37%	45%	36%	63%	54%	30%
6.07	Have dedicated time with my other half	35%	54%	37%	60%	38%	30%
6.00	Easy to get around by public transport	54%	56%	43%	48%	63%	51%
5.96	Explore the place	15%	50%	37%	49%	48%	23%
5.88	Good shopping	38%	66%	48%	41%	64%	24%
5.87	Feel special or spoilt	31%	56%	37%	53%	37%	19%
5.82	Do something environmentally sustainable/ green	40%	53%	66%	44%	33%	40%
5.80	A good place to visit at any time of year	26%	45%	40%	60%	41%	24%
5.79	Revisit places of nostalgic importance to me	21%	37%	39%	12%	24%	14%
5.66	Get off the beaten track	21%	57%	39%	36%	34%	46%
5.63	Meet and have fun with other tourists	30%	72%	42%	59%	45%	31%
5.56	Fashionable destination	37%	66%	49%	49%	49%	25%
5.47	Meet the locals	43%	45%	32%	51%	33%	22%
5.46	Visit places important to my family's history	30%	43%	25%	34%	31%	13%
5.42	Do something useful like volunteering to help on a project	34%	28%	29%	57%	38%	27%
5.41	Experience adrenalin filled adventures	46%	37%	36%	36%	28%	29%
5.36	Party	39%	57%	36%	34%	49%	28%
5.35	Go somewhere that provided lots of laid on entertainment/nightlife	45%	53%	47%	38%	66%	30%
5.29	Watch a sporting event	42%	33%	58%	40%	44%	40%
5.18	To participate in an active pastime or sport	26%	54%	51%	35%	31%	28%

Source: VisitBritain/Arkenford 2013



2.4 Reaching the consumer

Motivations for choosing Britain as a holiday destination

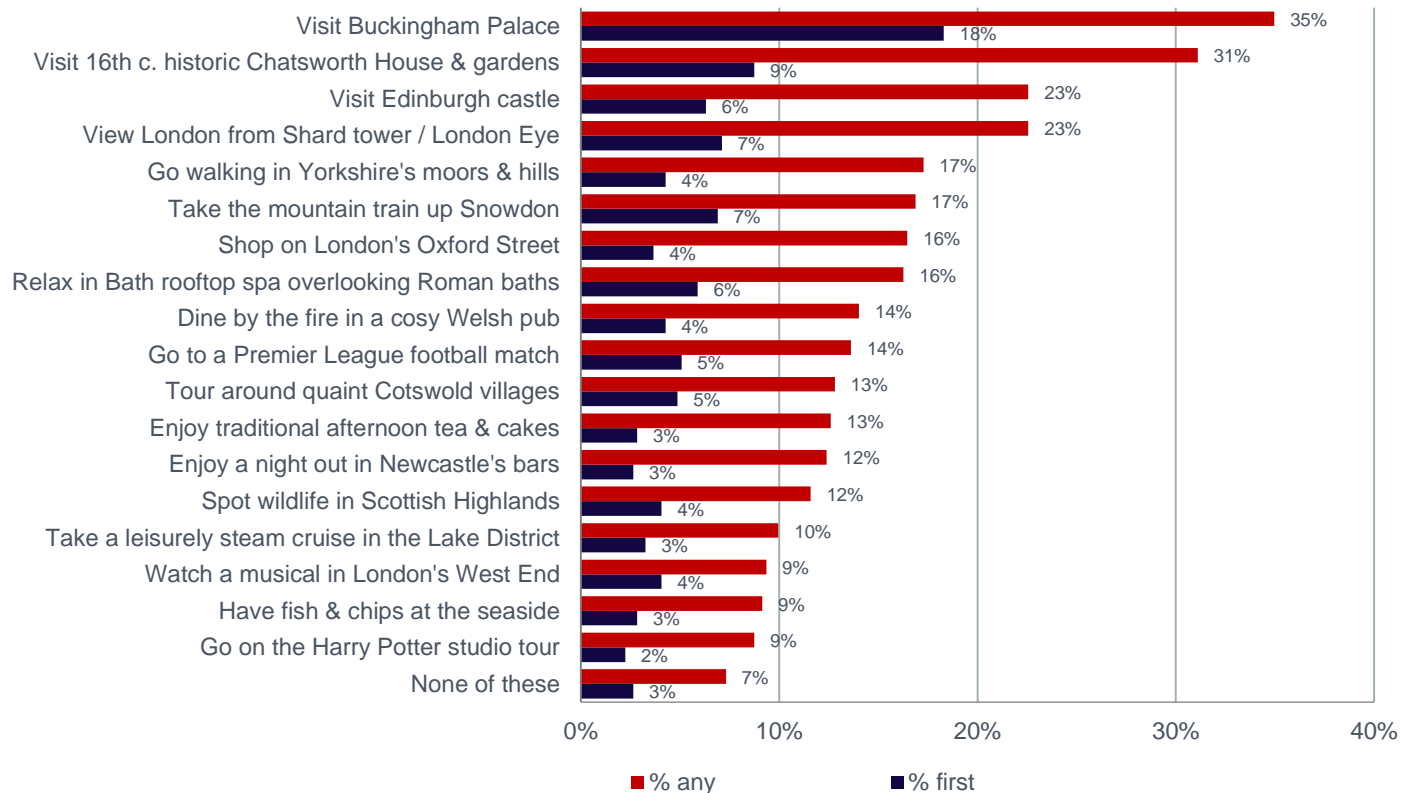


Source: VisitBritain/IPSOS 2016



2.5 Perceptions of Britain

Sought-after Britain activities



Source: GfK Anholt Nation Brands Index 2013; If you went on a holiday/vacation to Britain which of the following activities would you most like to do? Please choose a first, second and third choice



Chapter 3: Access and travel trade





3. Access and travel trade

- Most Chinese visitors will reach Britain by air. 12% of visits arrive through the tunnel or by sea.
- Monthly airline seat capacity from China to Britain has grown significantly in the past five years. Chinese carriers have increased their capacity to the UK, creating new routes or converting seasonal routes into year-round services.
- The Chinese travel market is still very much dominated by offline bookings. However online travel agents are making progress year on year.
- The online travel agent market also tends to be less fragmented than the traditional travel trade. Ctrip dominates this online travel market, but the “BATs” (Baidu, Alibaba, Tencent) are major players too.

+74%

Growth in seat capacity on direct, non stopping flights from China to Britain from 2011 to 2016

Source: Apex Rdc 2016



3.1 Access: key facts

- Most Chinese travel to the United Kingdom by plane. A growing number of carriers are serving this route directly, and some recently converted their seasonal flights to the UK into year-round services.
- Seat capacity on direct flights from China to the UK has increased steadily since 2010. In 2016 it had more than doubled the 2009 seat capacity.
- Chinese visitors departing Britain by air pay £75 in Air Passenger Duty when travelling in economy class.
- Manchester is the only UK city served by direct routes from China, outside of London. However, several of the largest cities in China boast direct routes to the UK.
- About one in ten Chinese visitors still pair the UK with at least a visit to continental Europe as they come via a ferry or the Eurostar.

Source: International Passenger Survey by ONS, Apex RdC 2016, *non-stop flights only

◀ Most Chinese visitors travel to the UK by plane.

Access to Britain*

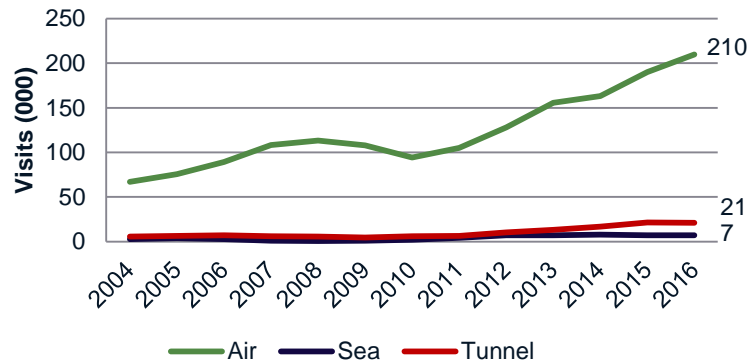
Measure	2016
Weekly aircraft departures	58
Weekly seat capacity on air routes	15,144
Airports with direct routes in China	5
Airports with direct routes in Britain	3



3.1 Access: mode of transport

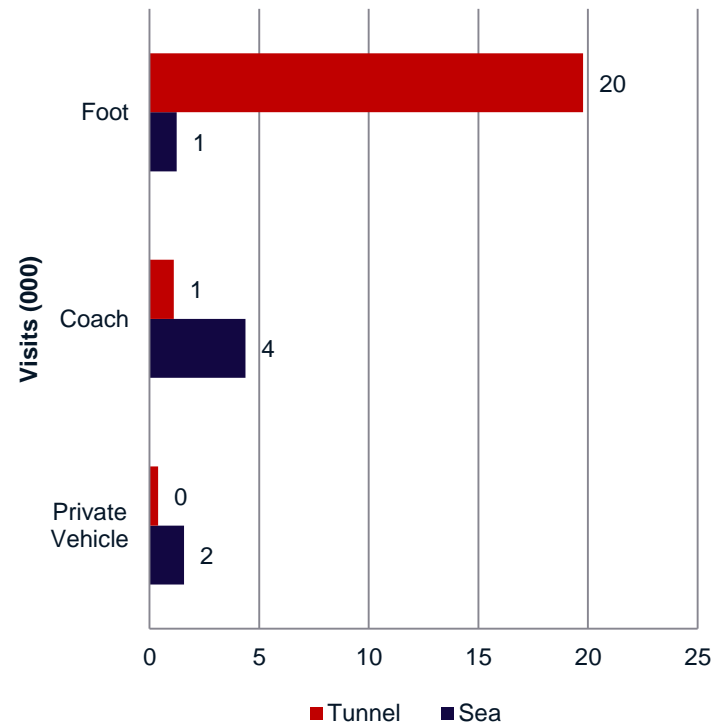
Visits by mode of transport

(average visits in 000s on rolling 3 years ending in)

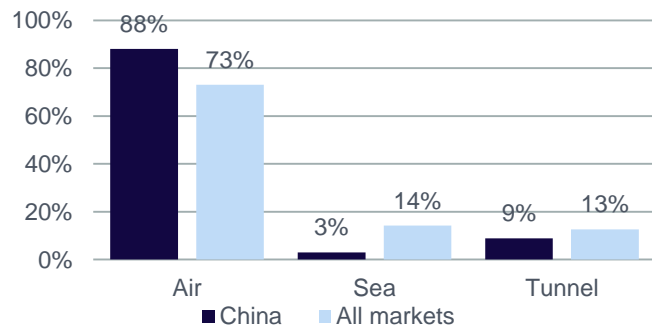


Sea and tunnel travel

(000s, 2014-2016 average)



Annual share by mode (2014-2016)

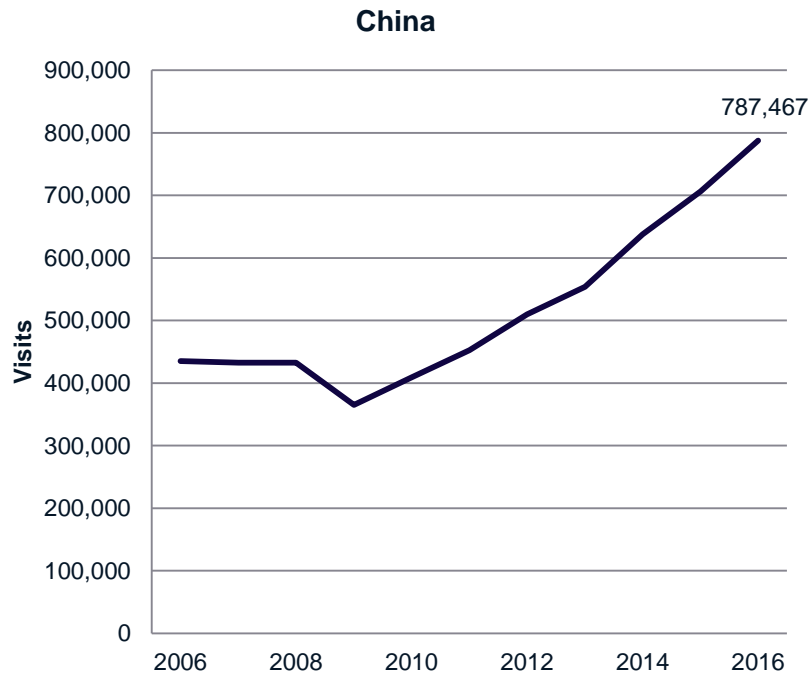


Source: International Passenger Survey by ONS

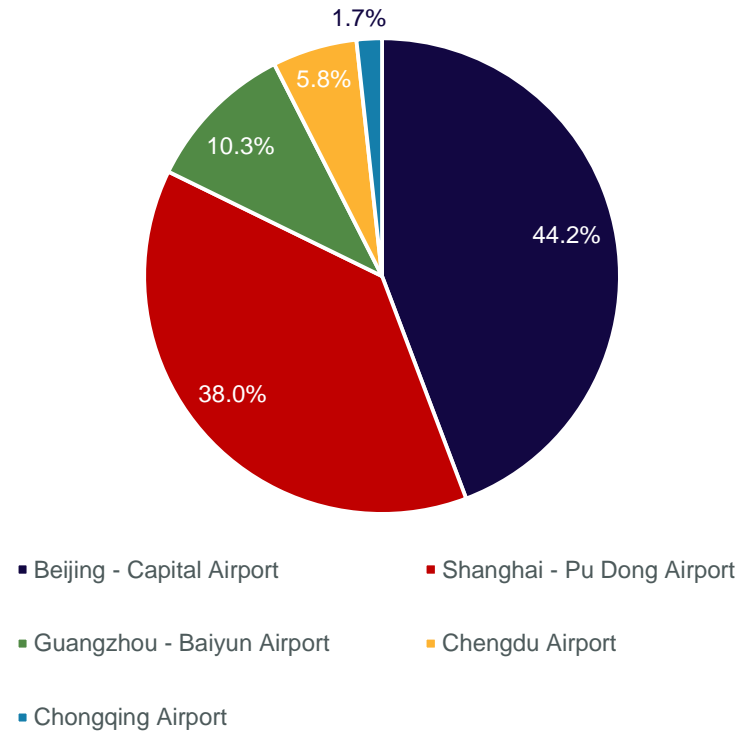


3.1 Access: capacity

Annual airline seat capacity trends



Origin airport annual seat capacity

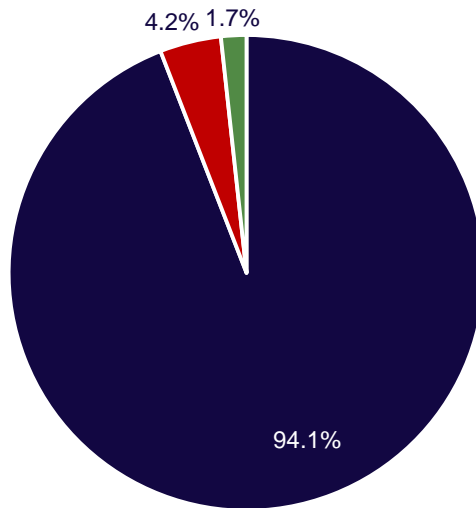


Source: Apex Rdc 2016: non-stop flights only



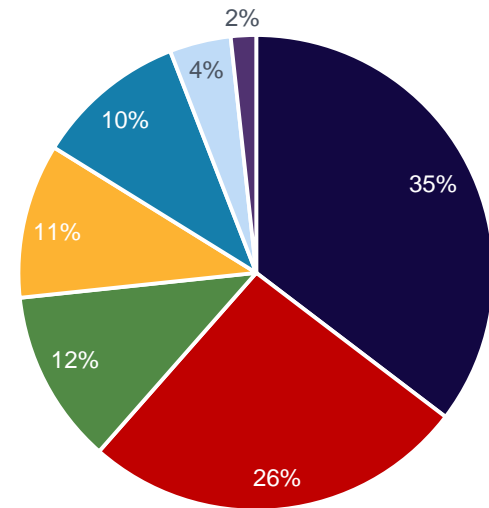
3.1 Access: capacity

Destination airport annual seat capacity



- London - Heathrow Airport
- Manchester International Airport
- London - Gatwick Airport

Airline seat capacity by carrier (2016)



- British Airways
- Virgin Atlantic Airways
- China Southern Airlines
- Tianjin Airlines
- Air China
- China Eastern Airlines
- Hainan Airlines

Source: Apex Rdc 2016: non-stop flights only



3.2 Travel trade: general overview

- The Home Office recognises over 200 travel agents under the ‘Approved Destination Status’ agreement in China. They are the only agents who can process leisure ADS visa applications, and thus operate leisure tours.
- The national tourist organisation CNTA is regulated by the State Council and is responsible for promoting the Chinese tourism industry as well as negotiating with overseas governments on ADS related matters.
- The main drivers of using an agent for international travel are: convenience; language barriers; visa preparation; knowledge gaps; value. Many Chinese visitors book group travel as a lot of them are first time international travellers and being part of a group can reassure them. However, the FIT segment keeps growing.
- Traditional agencies now have to face the competition of online travel agencies as the sector is growing: 41% of Internet users booked their travel online in 2016, a 15% increase on 2015.

Source: CNNIC, UKVI Factsheet

Major tour operators

Caissa Tourism (HNA-Caissa)
Beijing Baicheng International Travel Co.
Utour Group
China International Travel Service (CITS)
China Comfort Travel Group
Beijing Tourism Group
Jinjiang Travel (Shanghai Jin Jiang Tours)
Shanghai AirLines Tours International
Shanghai Fasco
Shanghai Spring
Ctrip
GZL (largest in South China)
Nanhu Travel (based in Guangzhou)
Qunar (Baidu Travel)
Fliggy (Alitrip)



3.2 Travel trade: online travel companies

Top ten online travel agents

Company Name	Market share 2015
Ctrip	25.5%
Tuniu	15.0%
CY	9.5%
Mafengwo	3.7%
Lvmama	3.2%
Aoyou	1.5%
Springtour	1.0%
Uzai	0.9%
MangoCity	0.8%
Caissa	0.5%

Other popular OTA (and links to other companies):

- eLong.com (Ctrip, Tencent)
- MakeMyTrip (Ctrip)
- Qunar (Ctrip, Baidu)
- UTourWorld
- LY.com (Tencent)
- Qyer.com
- Fliggy (previously Alitrip, Taobao travel)
- Baidu Travel

Source: COTRI/ctenn.com, 'Form 20-F' for OTA companies, Phocuswright



3.2 Travel trade: Chinese holidays

Public and local holidays

National public holidays

Dates in 2017	Dates in 2018	National Holiday
1-2 January	1 January	New Year Day & Holiday
27 January - 2 February	15-21 February	Chinese New Year (Spring Festival)
2-4 April	5 April	Ching Ming Festival
29 April - 1 May	1 May	Labour Day Holiday
28-30 May	18 June	Dragon Boat Festival
1-8 October	1-5 October	National Day Holiday (Golden Week)

Source: <http://www.officeholidays.com/countries/china/index.php>



3.2 Travel trade: practical information

General practical information:

- Business hours are usually 09:00–17:00 Monday to Friday.

Meetings:

- To understand China could be a daunting task for any foreigner. Traditional values and local business practices are different and diverse. What works in one part of China might not work in other parts of it.
- Try to understand the local perspective. Be empathetic, adaptable and patient and don't be afraid to ask.
- Always prepare to be introduced through a middleman and use guanxi (connection) as much as you can. Don't forget to give face (show respect) to the host and your partners.

Hospitality etiquette

- “Face” is important part in Chinese culture. Avoid embarrassing Chinese clients, even for a joke.
- Kissing and hugging are not a common form of greeting with the Chinese. Many of them would feel embarrassed, and so it is best to avoid it.
- Avoid politics as a conversation subject as it can be very sensitive.

Business meeting etiquette:

- There are a few simple steps to follow here:
 - Be punctual and prepared
 - Bring a small token gift to leave a good impression
- At the start of the meeting, the exchange of business cards is important: try to have a good supply of cards, possibly with contact details printed in Chinese on one side. You should present it with two hands, the right way round allowing the recipient to read the information.
- Titles are very important: address people directly by using their professional title or Mr, Mrs, or Miss, followed by the surname, starting with the most senior person in the room to begin and guide conversations.
- Chinese communications rules imply “saying it without saying it”: you will have to learn to read between the lines.
- To show humility when complimented, a Chinese person tends to deny it.
- The Chinese are interested in different culture and etiquettes and appreciate tips on understanding Western/British ways of doing things.



3.3 Caring for the consumer

Accommodation

- Chinese visitors value services with Chinese support (for example Chinese signage, Mandarin speaking staff, Chinese TV channels).
- The 2016 Hurun Report compares hotel requirement for the general travellers and the young affluent travellers. The former rank room cleanliness, personalised services and quality of the bedding as their main criteria; the latter value personalised services and the view from their room.

Food and drink

- With more and more affluent and younger consumers increasingly exposed to Western culture through their cosmopolitan life style, especially in urban coastal regions, more Chinese have started developing the so-called 'Western palate' and might appreciate wine, whisky (and other western spirits), cheese, dairy products, dessert etc. However, many Chinese tourists will recourse to familiar Chinese food once in a while, if not often.
- Breakfast is usually eaten between 06:00 – 09:00, lunch from 11:30-14:00 and dinner from 17:30 onwards, although customs are changing rapidly and becoming increasingly westernised.



3.3 Caring for the consumer

Mobile payment usage in China

- 52% of Chinese claim to use cash for only 20% or less of their monthly spending.
- 84% reported that they could accept a totally cashless life.
- Many dining establishments and retail outlets accept mobile payment.
- Wechat Pay can be used in 13+ countries outside of mainland China.
- Mobile Payment is now the standard of the travel industry ranging from hotels, attractions, taxis etc.

2016 measures	China
Overall spend through mobile payments	US\$5.5 trillion
Tencent mobile payment services' monthly active users in December	600 million
Tencent mobile payment services' average daily transactions in December	600 million

Prospects for mobile payment in China

- Mobile Payments are narrowing the gap between urban and rural consumers in China with the penetration currently standing at 20% and 17% respectively.
- Alipay and WeChat Pay should be the two main forces of mobile payment in the next 10 years in China.

Source: Tencent research



3.3 Caring for the consumer: Chinese language tips

Language basics & tips for arrival and departure

English	Chinese	Phonetics	
		Mandarin	Cantonese
Please	请	qǐng	tsing
Thank you	谢谢	xiè xiè	tse
Yes	是的	shì de	hai
No	不是	bú shì	ng hai
Sorry! (apology)	抱歉	bào qiàn	pou hip
Excuse me!	对不起	duì bú qǐ	deoi ng zyu
Sorry, I do not speak Chinese	对不起，我不说汉语	duì bú qǐ , wǒ bú shuō hàn yǔ	deoi ng zyu, wo ng gong zung man
Hello	你好	nǐ hǎo	nei hou
My name is...	我的名字是	wǒ de míng zì shì	wo ge meng hai...
Welcome to Britain	欢迎来到英国	huān yíng lái dào yīng guó	fun ngang loi dou ngang gwok
Pleased to meet you!	见到你很高兴	jiàn dào nǐ hěn gāo xìng	gin dou nei hou gou hing
How are you?	你好吗?	nǐ hǎo ma ?	nei hou ma?
Enjoy your visit!	祝你玩得开心!	zhù nǐ wán dé kāi xīn !	zuk nei wan dak hoi sam!
Goodbye	再见	zài jiàn	zoi gin
Did you enjoy your visit?	你玩得好吗?	nǐ wán dé hǎo ma ?	nei wan dak hou ma?
Have a safe journey home!	回程一路顺利	huí chéng yī lù shùn lì	wui cing jat lou seon lei
Hope to see you again soon!	期待再次相聚	qī dài zài cì xiāng jù	kei doi zoi ci soeng zeoi



3.4 Working with VisitBritain

We can help you extend your reach through:

- Digital and social media such as Youku, WeChat or Pinterest.
- Press and PR by sending us your newsworthy stories or hosting our journalists and broadcast crew
- Leisure, and the business travel trade via our programme of sales missions, workshops and exhibitions or promotion to our qualified Britagents and supplier directory
- Print advertising in targeted media/Britain supplements
- Retailing your product through the VisitBritain shop
- Or as a major campaign partner

We are here to support you and look forward to working with you. To find out more browse our

GREAT China Welcome Programme

(visitbritain.org/great-china-welcome)

or opportunity search

(visitbritain.org/opportunities)

or trade website

(trade.visitbritain.com)

or contact the B2B events team

(Email: events@visitbritain.org)

or campaign partnerships team

(Email: partnerships@visitbritain.org)

or trade support team

(Email: tradesupport@visitbritain.org)



3.5 Useful research resources

We have dedicated research and insights available which include:

- Latest monthly and quarterly data from the International Passenger Survey by ONS
(visitbritain.org/latest-monthly-data
visitbritain.org/latest-quarterly-data-uk-overall
visitbritain.org/latest-quarterly-data-area)
- Inbound Tourism Trends by Market
visitbritain.org/inbound-tourism-trends
- Sector-specific research
visitbritain.org/sector-specific-research
- 2017 Inbound Tourism Forecast
visitbritain.org/forecast
- Britain's competitiveness
visitbritain.org/britains-competitiveness

We are here to support you and look forward to working with you.

To find out more about China or other inbound markets browse our markets & segments pages or (visitbritain.org/markets-segments) our inbound research & insights or (visitbritain.org/inbound-research-insights) contact us directly (Email: research@visitbritain.org)



3.5 Useful market-specific research resources

We have dedicated research and insights available which include:

- Planning, decision-making and booking cycle of international leisure visitors to Britain
<https://www.visitbritain.org/understanding-international-visitors>
- Technology and social media
<https://www.visitbritain.org/understanding-international-visitors>
- Gateways in England, insights on overseas visitors to England's regions, participation in leisure activities, multi-destination trips and more
[visitbritain.org/visitor-characteristics-and-behaviour](https://www.visitbritain.org/visitor-characteristics-and-behaviour)
- Food & drink research
[visitbritain.org/inbound-food-drink-research](https://www.visitbritain.org/inbound-food-drink-research)

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Market and Trade Profile: China