

## 2017 China-Europe Tourism Market Data Report

China Tourism Academy

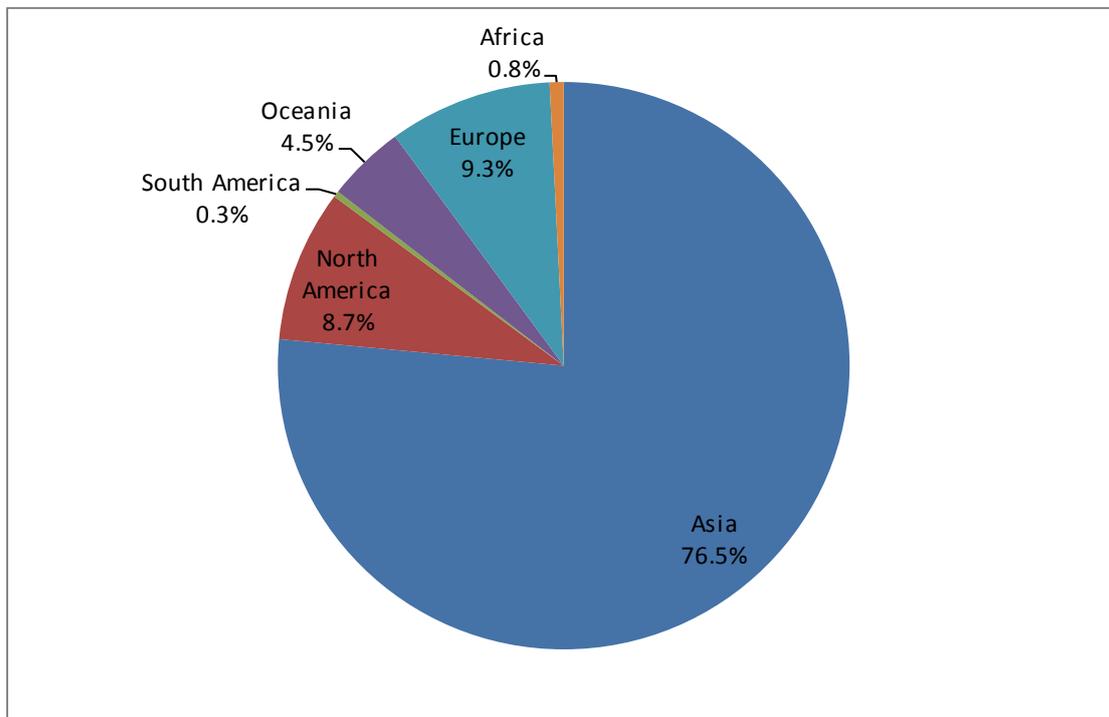
Ctrip Group

Data Source: Ctrip.com

Since the signing of the ADS agreement, the number of China-Europe tourism exchanges has increased at an average annual rate exceeding 10%. More goodwill, more tolerance and more patience are becoming the main theme of tourism cooperation between China and Europe. In 2017, Chinese citizens visiting Europe exceeded 6 million for the first time. Counting Chinese tourists departing from outside of China, and taking into account that most itineraries include multiple countries, total Chinese tourist volume to Europe is estimated to be over 12 million visits. Tourism is making a significant contribution to local economic growth and social employment for China and Europe.

### Part1. Overview of 2017 China-Europe Tourism Market

According to the Ctrip airline ticket sales data, Europe was the second most popular destination for Chinese tourists, accounting for 9.3% of the total.



In 2017, political and economic situation in Europe eased. Compared to the previous year, the number of Chinese tourists who traveled to Europe through Ctrip increased by 26.3%, while per capita consumption at destinations increased by 36%. On one hand, due to improvements in living standards and purchasing power, tourists have higher demand on the quality of travel

services and personalized tourism experience, paying more and more attention to the comfort of tours and enjoyment of high-end services. They are also willing to explore different forms of tourism and travel products. On the other hand, the appreciation of Euro made tourism and destination expenditures more expensive for Chinese tourists.

The most popular European destination countries were: France, Italy, United Kingdom, Spain, Germany, Russia, Netherlands, Switzerland, Greece and Austria. As traditionally popular destinations, France, Italy, Spain, and Germany were still favored by tourists. Whether traveling in group tours or in self-coordinated tours, most tourists chose these countries as preferred destinations in Europe. European countries with largest increase in number of tourists in 2017 were: France, Czech Republic, Bulgaria, Finland, Iceland, Belarus, Denmark, Norway and Ukraine. As one of the most representative Eastern European countries, Czech received more and more attention from tourists in the recent years for its unique architectural style as well as rich heritage of literature and art.

The most popular destination cities in Europe were: Paris, Amsterdam, London, Rome, Frankfurt, Barcelona, Moscow, Milan, Madrid and Prague. Most of the top destination cities in Europe were capital cities. They have convenient transportation, strong economies, beautiful landscape, and deep cultural heritage. As the tourists' requests for customization continue to increase, international metropolises with developed economies are well-equipped to provide a diverse range of travel experiences and offer an array of cultural and artistic activities.

Chinese tourists have booked tickets to Europe on Ctrip an average of 10.3 days ahead of scheduled departure. The top 10 countries with the largest airline tickets sales in 2017 were France, Germany, the United Kingdom, Italy, Spain, Russia, Greece, Netherlands, Switzerland and Czech Republic. Greece saw the largest increase of 74% compared to 2016. The 10 top cities with the largest airline tickets sales in 2017 were: Paris, Frankfurt, London, Rome, Barcelona, Milan, Moscow, Madrid, Amsterdam and Manchester. Most cities in the ranking were economic hubs, with a large number of people traveling for business, study and sightseeing.

Among the European destination cities with the most hotel room nights, Paris, Milan, London, Frankfurt, Amsterdam, Madrid, Lisbon, Barcelona, Moscow and Prague ranked highest. As the economic, artistic and cultural center of Europe, these cities provide tourists with comfortable and convenient environment and a variety of artistic and cultural activities.

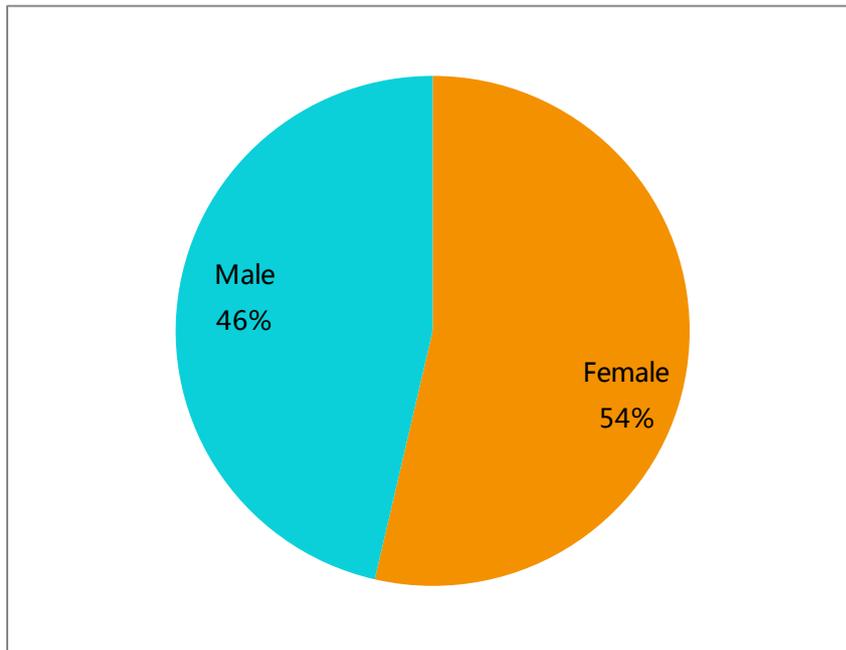
According to Ctrip European package tour sales data, 2017's the most popular European destination countries for group tour were: Italy, Russia, Germany, United Kingdom, France, Spain, Greece, Czech Republic, Switzerland and Hungary. Among them, Czech Republic had the largest annual growth of 73%, followed by Germany with 56% growth. The most popular European destination cities for group tour in 2017 were: Rome, Moscow, Frankfurt, London, Paris, Barcelona, Athens, Prague, St. Petersburg and Budapest. Most of the travel routes included more than three countries, were with 4 or more diamonds, and on average lasted for 10-12 days.

The European countries that sold most Ctrip visa-related services in 2017 were: France, Germany, United Kingdom, Italy, Russia, Spain, Switzerland, Netherlands, Greece and Czech Republic.

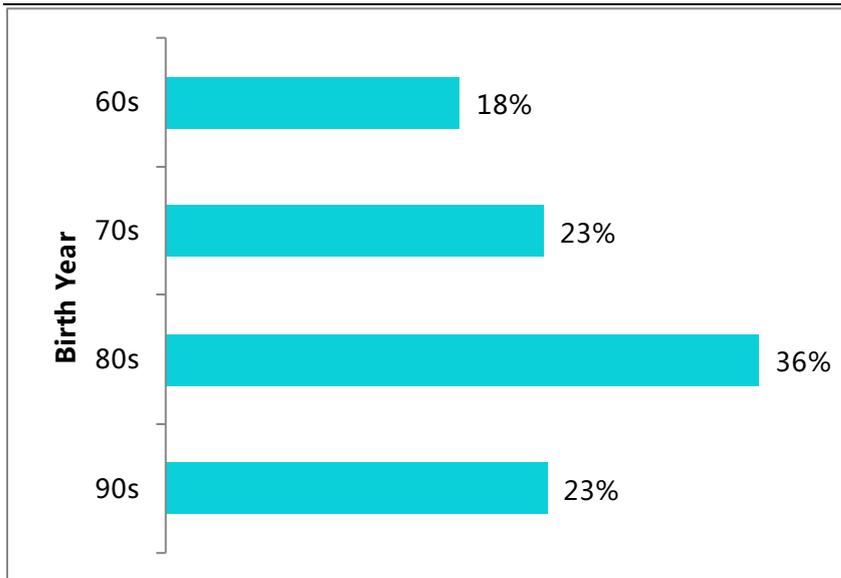
Among the European attractions that sold most tickets on Ctrip in 2017 were Sagrada Familia Cathedral, Louvre, Casa Batlló, London Eye, Park Guell, Disneyland Paris, La Pedrera, Vatican Museums, Versailles Palace, and Alhambra Palace. Art and cultural attractions made up the majority. Unique European classical art, museums with collections from all over the world and distinctive architectures attract a large number of Chinese tourists.

## Part 2. 2017 China-Europe tourists portrait

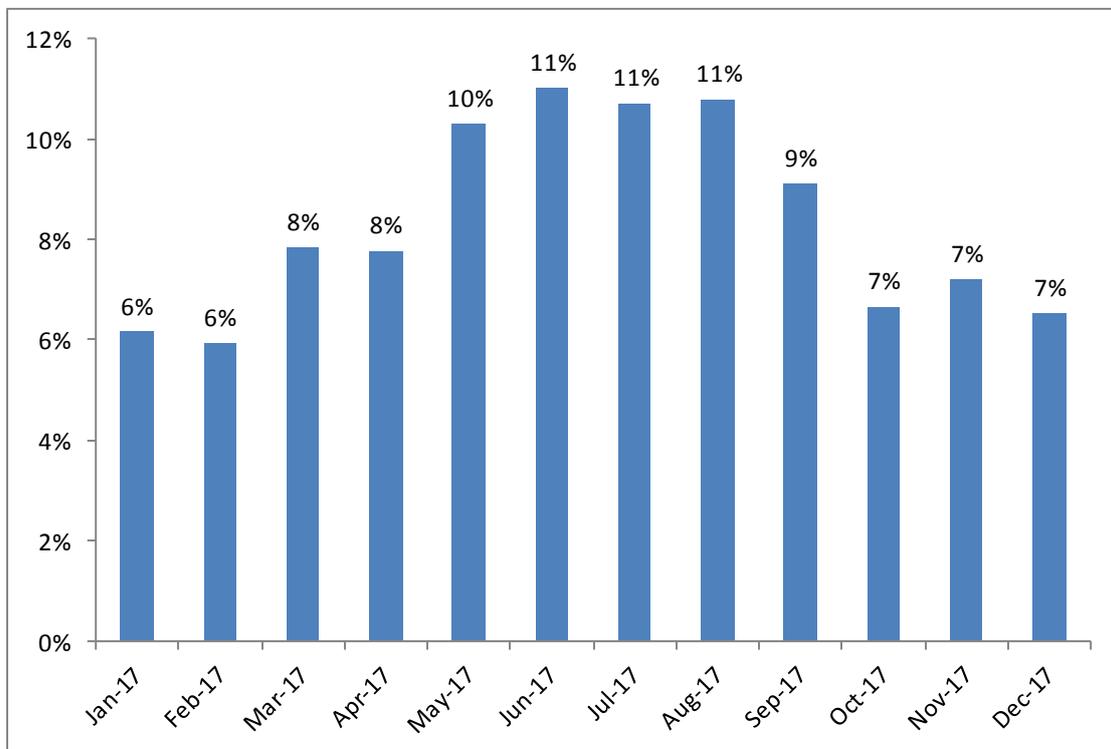
In 2017, most tourists were female, accounting for 54% of the total. This was a 13.4% increase since 2016. The number of male tourists increased more slowly at 2.5%.



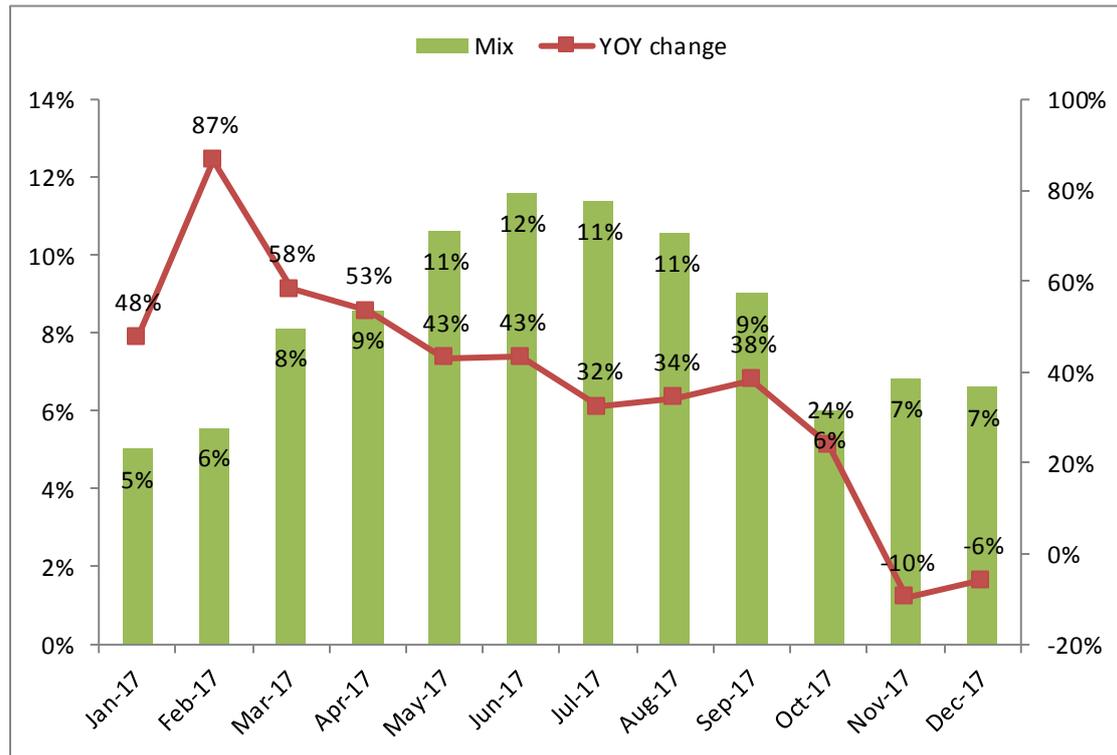
30-40 year-old demographic is the main force of European tourism. This age group has higher income and greater purchasing power. Much of this age group travels with family and have higher demand for high-quality travel services and comfortable experience.



Summer (May – September) is the peak season for traveling to Europe. Tourists during summer accounted for 52% the annual total. Winter is the low season for traveling to Europe due to cold weather. Tourists prefer warm, subtropical countries in the southern hemisphere during winter months.

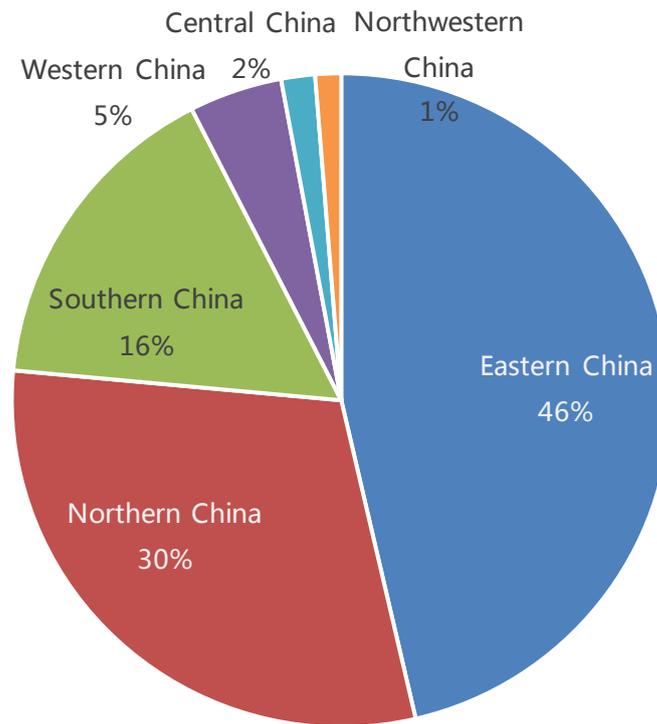


The consumption pattern of tourists' largely corresponded to tourist volume. In 2017, consumption between May to September accounted for 53% of the annual total, an average increase of 37% compared to 2016. Air ticket and hotel prices heightened during the peak season, contributing to higher per capita consumption. November and December are the low season for tourism in Europe. The prices of tourism products were reduced. Compared to 2016, consumption amount decreased by 8% on average. February saw the highest growth of consumer spending, due to the rise of tourism costs during the Spring Festival.

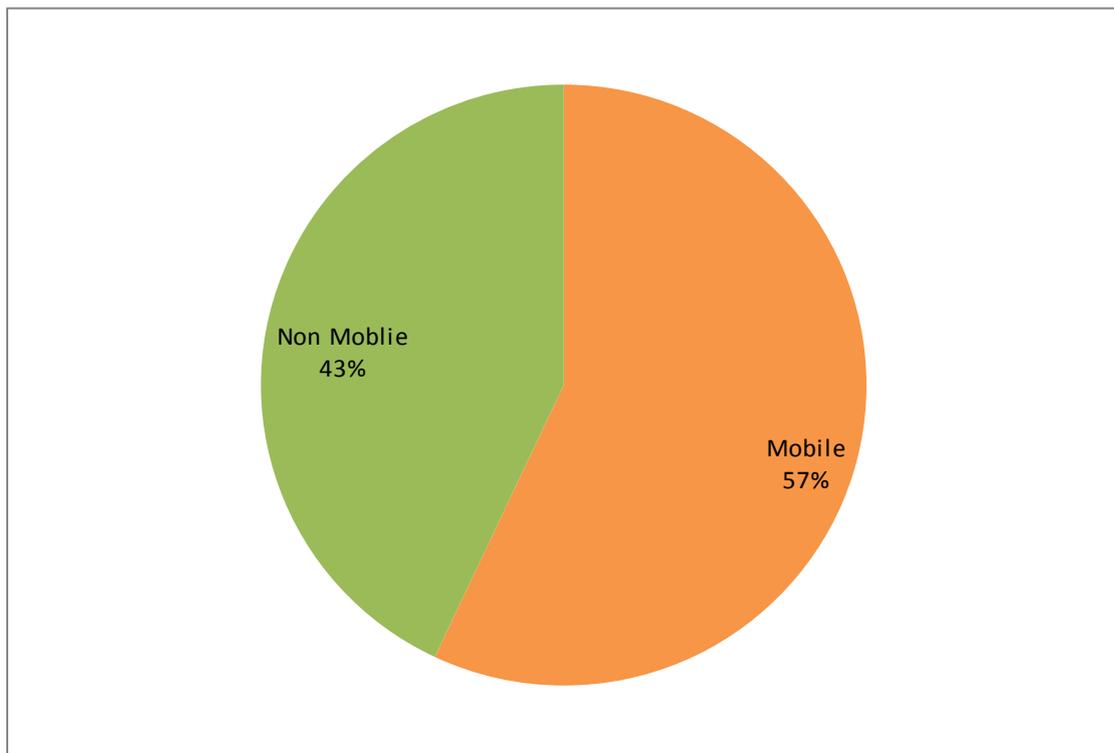


The top 10 departure cities for Chinese tourists traveling to Europe in 2017 were: Shanghai, Beijing, Guangzhou, Shenzhen, Hangzhou, Wuhan, Chengdu, Nanjing, Chongqing and Zhengzhou. Most of them boast advanced economies. The cities with largest increase of tourists in 2017 were: Shanghai, Beijing, Guangzhou, Chengdu and Chongqing.

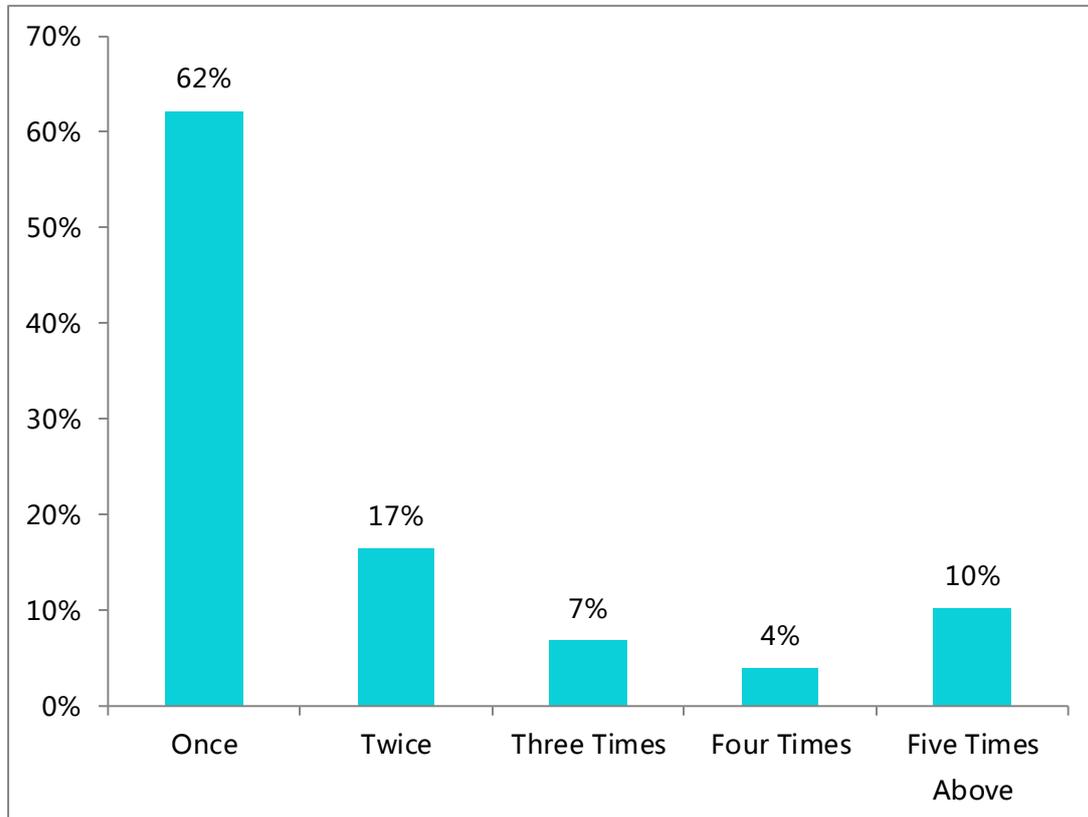
In 2017, most number of tourists came from eastern China, amounting to 46% of the total tourists in the country, a 31% increase from 2016. People in Shanghai, Jiangsu and Zhejiang have strong spending power and are willing to travel abroad. The fastest-growing area is southern China which saw 45% increase since 2016. The northwestern area, constrained by economic development, accounted for a relatively low proportion, but saw a 35% growth compared to 2016.



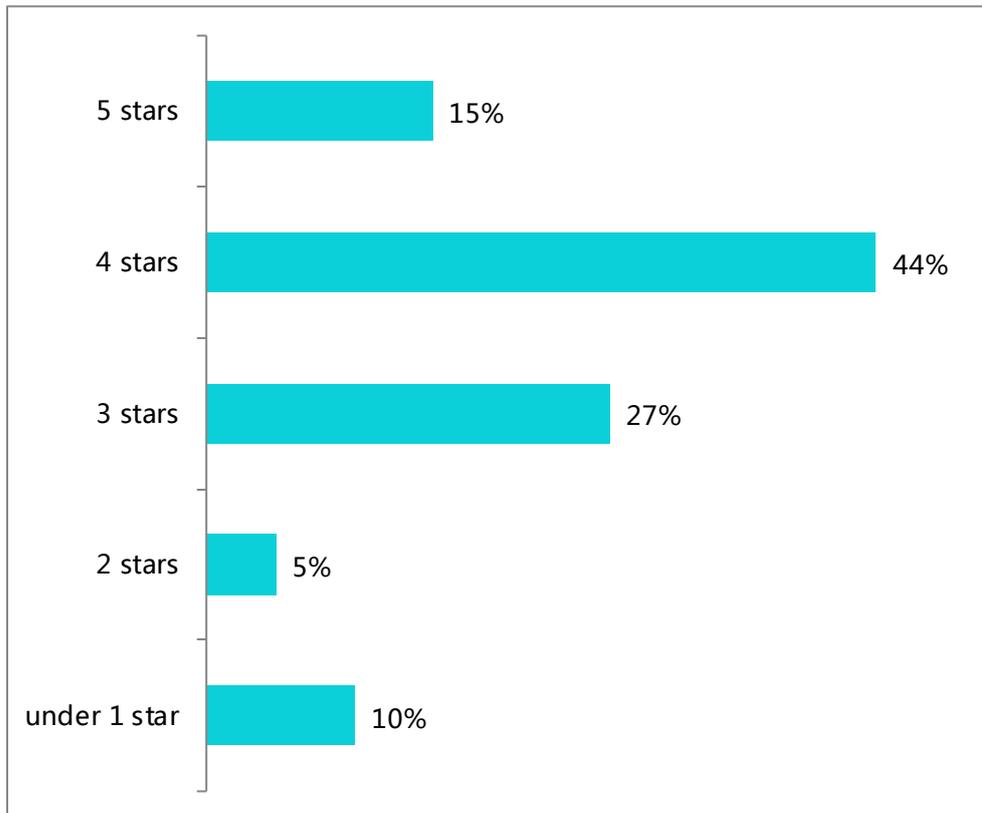
In 2017, 57% of tourists to Europe booked via mobile channel on Ctrip. Since 2016, the number of APP subscribers increased by 40%, an increase significantly steeper than other channels. The mobile booking channel is faster and more convenient, and tourists depend more and more on their mobile devices while traveling.



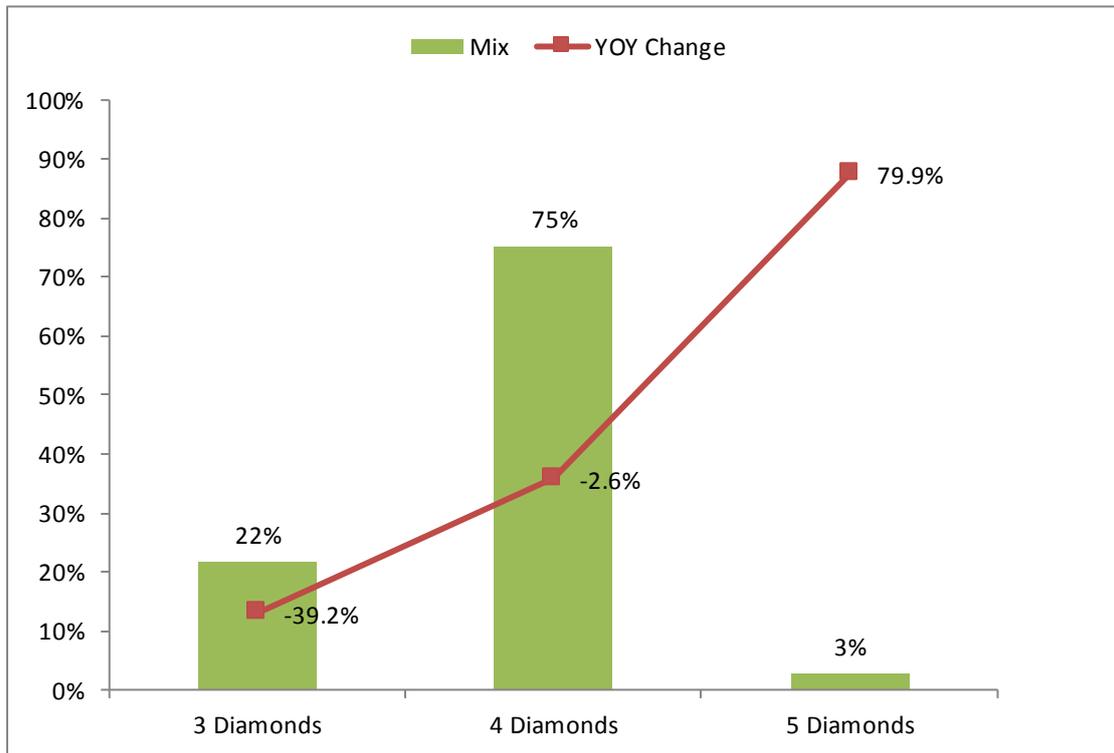
62% of tourists traveling to Europe visited it once in 2017; 17% traveled to Europe twice. High-frequency tourists accounted for a low proportion, due to the long flight time and high travel cost.



Among European hotels booked on Ctrip, 86% were hotels with 3 or more stars, a 66% increase since 2016. 4-star hotels were the most common, accounting for 44%, a 69% increase since 2016. Five-star hotel saw the fastest growth – 72%. This implies that Chinese tourists' preference for high-end hotels is rising. Tourists' spending power is getting stronger, focusing on travel experience and comfort.



Among the European travel products on Ctrip in 2017, 3-diamonds products accounted for 22%, a 39.2% decrease from 2016. 4-diamonds products were the largest category accounting for 75%, a 2.6% decrease from 2016. 5-diamonds products accounted for 3%, with the highest growth rate of 79.9% compared to 2016. This shows that the most popular choices are middle- and high-end travel products, with demand for high-end travel products growing most rapidly.



### Part 3. Summary

In 2017, economic and political situation in Europe eased. The European economy was gradually recovering. The tourism market in Europe showed a good momentum of development. Both the number of tourists traveling to Europe and the per capita consumption at European destinations had relatively high growth rates.

Economic factors had a large impact on the European tourism market in 2017. From the perspective of destinations, popular European destination countries and cities are political, economic and cultural hubs that met the diversified needs of tourists in all aspects. From the perspective of tourist departure cities, Chinese tourists to Europe mostly originated from economically developed regions. Online traffic for European tourism websites were also heavily concentrated in the eastern coastal areas and developed inland regions. These areas are economically developed. People's living standards and economic status are relatively high, bearing strong willingness to travel abroad and demand quality tour service.

In the analysis of travel preferences of tourists traveling to Europe, it can be seen that Chinese tourists prefer humanities and arts attractions and have pronounced preference for art exhibitions such as traditional European buildings and museums. Due to the high cost of travel, most tourists travel to Europe at low frequency and stay for a long time during each visit. Most of the tourist routes includes more than three countries. The demand of high-end tourism products increased significantly, due to greater emphasis on comfort and personal experience of travel.



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Self-coordinated group tours are growing rapidly. More tourists are not satisfied with the traditional traveling routes. They seek for leisure travel with greater freedom and are willing to explore new things. The mature tourism market in Europe helped reduce the barriers to self-coordinated tour, conducive to the development of this travel form.