



# China Tourism Industry Report, 2013-2017

Nov. 2013

## **STUDY GOAL AND OBJECTIVES**

This report provides the industry executives with strategically significant competitor information, analysis, insight and projection on the competitive pattern and key companies in the industry, crucial to the development and implementation of effective business, marketing and R&D programs.

## **REPORT OBJECTIVES**

- ◆ To establish a comprehensive, factual, annually updated and cost-effective information base on market size, competition patterns, market segments, goals and strategies of the leading players in the market, reviews and forecasts.
- ◆ To assist potential market entrants in evaluating prospective acquisition and joint venture candidates.
- ◆ To complement the organizations' internal competitor information gathering efforts with strategic analysis, data interpretation and insight.
- ◆ To suggest for concerned investors in line with the current development of this industry as well as the development tendency.
- ◆ To help company to succeed in a competitive market, and

## **METHODOLOGY**

Both primary and secondary research methodologies were used in preparing this study. Initially, a comprehensive and exhaustive search of the literature on this industry was conducted. These sources included related books and journals, trade literature, marketing literature, other product/promotional literature, annual reports, security analyst reports, and other publications. Subsequently, telephone interviews or email correspondence was conducted with marketing executives etc. Other sources included related magazines, academics, and consulting companies.

## **INFORMATION SOURCES**

The primary information sources include Company Reports, and National Bureau of Statistics of China etc.

## Abstract

China tourism market has gained momentum in recent years, with the CAGR of 26.2% between 2009 and 2012. In 2012, the revenue in China tourism industry approximated RMB2.6 trillion, up 15.1% year-on-year.

China is at the turning point for economic restructuring and upgrading, leading to the economic growth slowdown but still in a robust way. Coupled with the improvement of national income level, the tourism industry of China witnesses consolidated growth, with the estimated revenue in 2013 growing by 14.3% year-on-year.

### Domestic Tourism Is Of Absolute Dominance

China tourism industry is made up of domestic tourism, inbound tourism and outbound tourism. Of these, domestic tourism is of absolute dominance in terms of either population or revenue. In 2012, the population of domestic tourism stood at 2.957 billion person-times, accounting for 93.2%, with the revenue hitting RMB2.2706 trillion or 87.8%. It is estimated that the number of domestic tourists in 2013 will claim 3.275 billion person-times, standing at 95.3%, with the targeted revenue increasing by 15.4% year-on-year to RMB2.62 trillion.

Revenue and YoY Growth of China Tourism Industry, 2007-2017



Source: China National Tourism Administration; ResearchInChina

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## The Number of Star Hotels Demonstrates Shrinkage, while the Number of High-End Hotels Continue Expanding

In 2012, China had a total of 24,900 travel agencies with a year-on-year increase of 5.3%. In 2007-2012, the number of travel agencies in China witnessed stable growth momentum, with the CAGR of 4.8%. In particular, the number of star-class hotels saw a CAGR of negatively 3.5% from 2007 to 2012, three-star hotels 5.9%, four-star hotels 10.5%, and five-star hotels 13.9%.

The report touches on 20 major tourism enterprises, of which, three ones specialize in hotel running, one mainly involves in cruise business and the other 16 ones feature tourism industry. In 2012, the top three tourism companies by revenue came to Overseas Chinese Town (Group) Co., Ltd., China International Travel Group and China CYTS Tours Holding; the top three ones by net profit margin were as follows: Lijiang Yulong Tourism (33.2%), Emei Shan Tourism Company Limited (19.9%), Overseas Chinese Town (Group) Co., Ltd. (18.2%).

In 2013Q1-Q3, the top three by revenue in the ranking list remained unchanged, but the top three ones by profitability made a change with Emei Shan Tourism Company Limited losing out to Dalian Sunasia Tourism Holding Co.,Ltd.. In the first three quarters of 2013, the three-Overseas Chinese Town (Group) Co., Ltd., Huatian Hotel Group CO.,LTD and Dalian Sunasia Tourism Holding, experienced a year-on-year sharp rise of 66.7%, 24.8% and 17.6%, respectively. By contrast, another three ones, including XI'AN Tourism (Group), Guilin Tourism Corporation Limited and Wuhan Sante Cableways Group -witnessed the worst business performance in the same period, making them become the only three industrial players suffering severe losses.

### **The report highlights the followings:**

- ✘ status quo (revenue, number of tourists), development trend (next one to five years), and market segmentation (by product, region, etc.) of China tourism industry;
- ✘ operation (development scale, revenue, revenue structure, distribution, the number of travel businesses and star-class hotels, the number of guest rooms and occupancy rate) of travel agencies and hotels;
- ✘ 20 key Chinese tourism enterprises, travel agencies and hotels; focusing on their operation, revenue structure, latest dynamics and development outlook from different perspectives.

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