

China Tourism Report Q4 2016

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Abstracts

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BMI View: China's tourism industry is growing rapidly and we are seeing major investment in travel and accommodation infrastructure from both domestic and international developers who are keen to take advantage of growth potential, improving the accessibility of the market and expanding the range of hotel options on offer. Much of the potential growth will be based upon China's large domestic market as the international inbound tourism market has an increasingly mixed outlook: while some source markets will see growth over the medium term, rising economic uncertainty in European source markets and escalating regional territorial disputes could dampen arrivals. The huge size of the domestic market does somewhat offset this risk and overall China's tourism industry will remain a popular investment destination.

Key Updates And Forecasts

Declines in key international source markets, including a potential downturn in many European markets from the UK's EU referendum results, will impact upon China's inbound travel market over the medium term. We have revised our forecasts this quarter to show a slow decline in arrivals to 24.3mn in 2020, though we note visitors from some key markets, such as South Korea, will continue to grow.

China's range of attractions continues to expand. In June 2016 the gates were opened to the country's first Disneyland at Shanghai, built at an estimated cost of USD5.5bn. Disney is reportedly considering building a second park in China, in the central area of the western region. Competing with Disneyland is the 200 acre Nanchang Wanda Park, which opened in May 2016.

As well as planned investments in new airport infrastructure, China continues to broaden the reach of air travel with a number of new flight routes announced including those of China Eastern Airlines which launched three new routes to European destinations in June 2016 and Air China which has expanded its range of flights to North America.

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