

China - Travel and Tourism: Leisure and business activity driven market (Strategy, Performance and Risk Analysis)

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Abstracts

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SUMMARY

China is one of the fastest growing economies in the world with a nominal GDP of US\$11,271 billion in 2016, posting a CAGR of 7.1% over the review period (2012-2016) from US\$8,570.5 billion in 2012. It is expected to grow at a CAGR of 6.0% over the forecast period (2017-2021) to reach US\$15,057 billion by 2021, supported by an anticipated increase in exports. Moreover, the sheer size of its population offers a huge market, which makes it an attractive business destination.

MarketLine Premium's industry reports provide a comprehensive market view including sections on: risk and reward, key industry trends and drivers, industry SWOT analysis, industry benchmarking to compare key performance indicators with regional and global markets, competitive landscape, industry innovation, deals and key developments.

KEY HIGHLIGHTS

Regional markets to foster revenue growth

Total revenue from passenger airlines increased at a CAGR of 9.1% over the review period, reaching US\$73.8 billion in 2016, and is forecast to increase at a CAGR of 13.4% from US\$82.2 billion in 2017 to reach US\$135.8 billion by 2021. Full service airlines accounted for the majority of revenue in 2016, and will be the key driver over

2017-2021. China's top three state-owned full-service carriers (Big Three) rank among the top 10 airlines globally in terms of passengers carried. However, none of these are in the top 10 when only international passengers are taken into account, demonstrating the extent of dependence on domestic and regional markets, including Hong Kong, Macau, and Taiwan.

China recorded the largest car rental fleet size in Asia-Pacific

China is the largest car rental market in the Asia-Pacific region in terms of both market value and size. It reported an overall fleet size of over 200,000 cars in 2016. The majority of car rentals in China were for leisure purposes, with growth primarily due to a rise in self-drive rentals. In 2016, CAR Inc. self-driving revenue increased by 19.0% y-o-y, its customer base increased by 30.0% y-o-y, and registered members increased by 55.0% y-o-y.

Pricing strategies to drive the car rental market

The car rental market's value in China reached US\$2.1 billion in 2016 and is forecast to increase at a CAGR of 10.8% to reach US\$3.5 billion by 2021. Growth in the Chinese car rental market is led by competitive pricing strategies through dynamic pricing and promotions. In the second half of 2016, CAR Inc. conducted a more aggressive pricing strategy, which increased its rental days by over 40.0% y-o-y.

SCOPE

Risk & Reward Index - This compares the lucrativeness of the Chinese travel and tourism industry with regards to other countries in the region in terms of specific risk and reward parameters.

Industry Snapshot and Industry View - Key travel and tourism industry statistics, including total revenue and expenditure for key industry segments and the trends driving market performance in the Chinese travel and tourism market.

Industry SWOT Analysis - Discover the Strengths, Weaknesses, Opportunities and Threats impacting market performance as well as investments in the Chinese travel and tourism market.

Industry Benchmarking - Benchmark how the Chinese travel and tourism market is performing compared to regional and global markets in terms of car

rental fleet size, car rental revenue, number of hotels, hotel revenue, passenger airline revenue, seats available and seats sold, revenue of travel intermediaries and tourism expenditure growth.

Competitive Landscape - Overview of relevant players in the Chinese travel and tourism industry such as airlines, hotels and car rental companies, with each player in the relevant category compared with its peers in terms of relevant industry indicators.

REASONS TO BUY

How is the market performing in terms of indicators such as total tourist visits, passenger airline seats sold, seats sold by purpose of visit such as leisure, revenue, room nights available, room nights occupied, hotel revenue, car rental days among others.

How risky is it to invest in the Chinese travel and tourism industry compared to other countries in the Asia-Pacific?

What is driving the performance of key industry segments such as passenger airlines, accommodation and car rentals?

Who are the leading players in the Chinese travel and tourism industry and their overview and product portfolio?

What trends are being witnessed within the Chinese travel and tourism industry?

What are the Chinese travel and tourism industry's Strengths and Weaknesses and what Opportunities and Threats does it face?

What are the recent developments and innovations in the Chinese travel and tourism industry?

Contents

Risk & Reward Index
Industry Snapshot
Industry View
Industry SWOT Analysis
Industry Benchmarking
Industry Performance
Competitive Landscape
Innovation
Deals
Key Developments
Appendix

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