

CHINA'S *REGENERATION*



Who is Cristina?





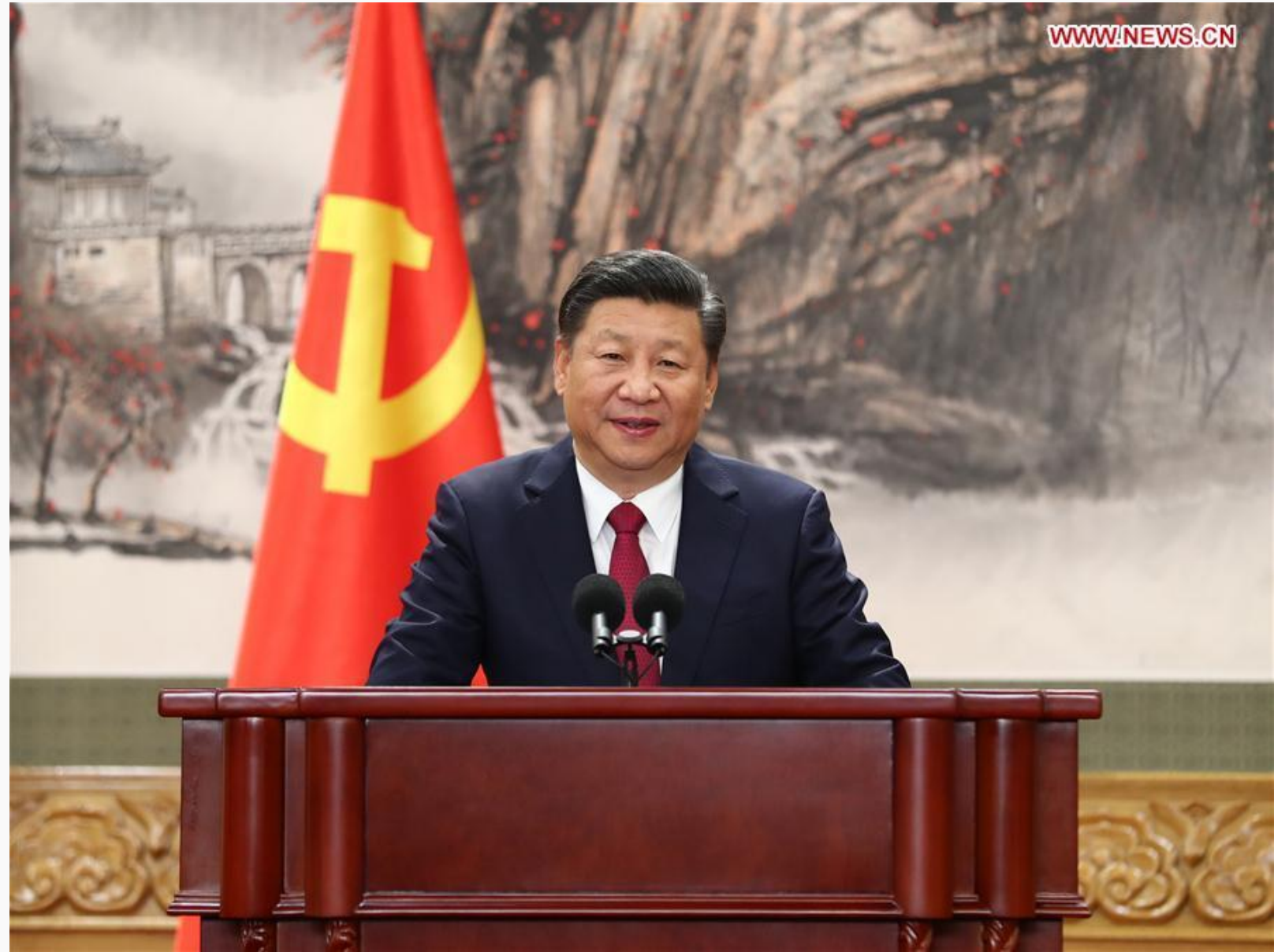
19th CPC National Congress

Xi Jinping's Vision

Mr. President XI JINPING

China economy has been transitioning from a phase of rapid growth to a stage of high quality development. In developing a modernized economy the country must focus on the real economy.

China will support state capital in becoming stronger doing better and growing better turn Chinese enterprises into world-class globally competitive firms.



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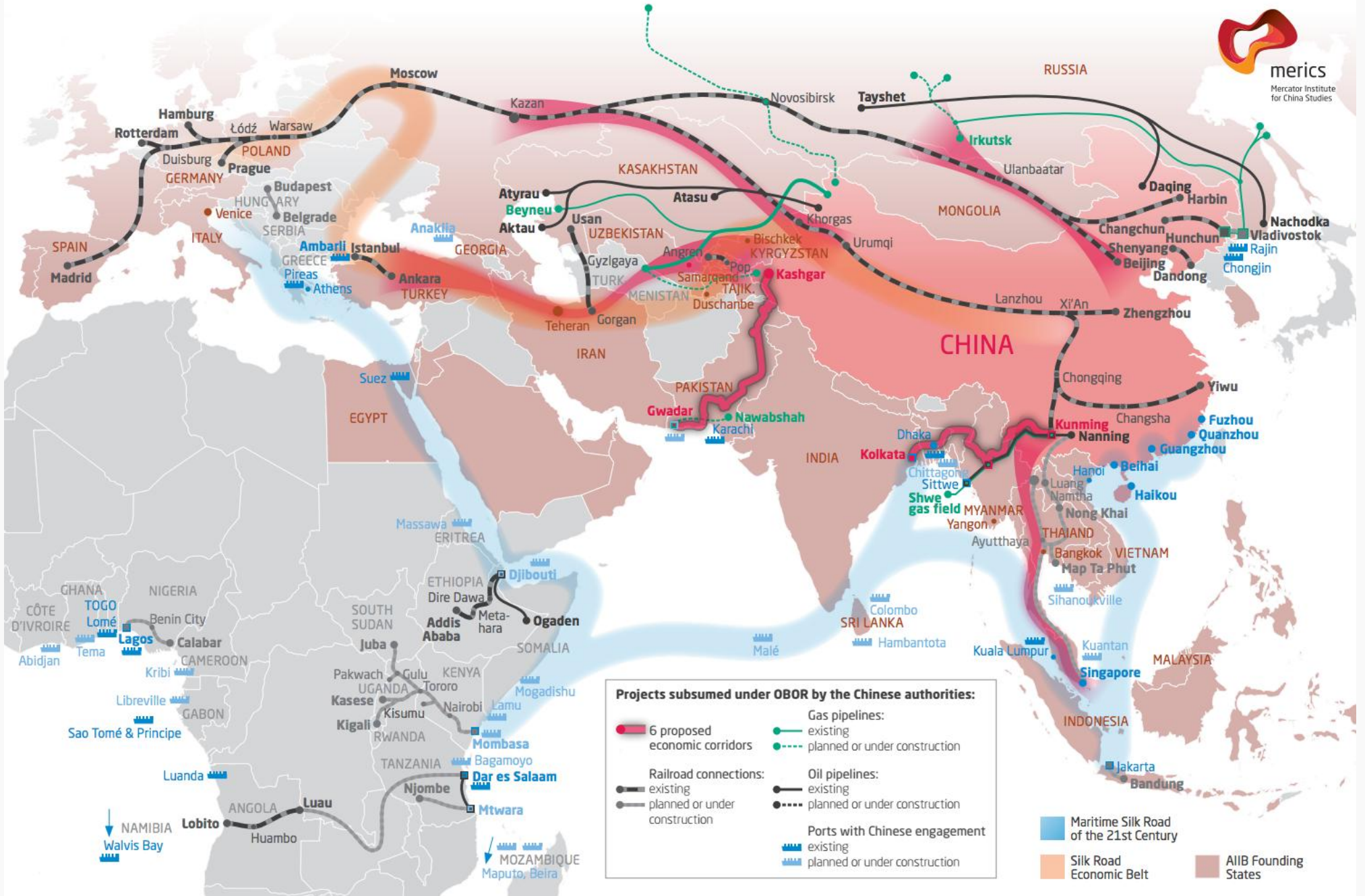
2016–2025

Global Leader
in manufacture
by 2049

*Indigenous
Innovation*

BRI

65 Countries
4.4 billion of people
1/3 global economic output
6 economic corridors



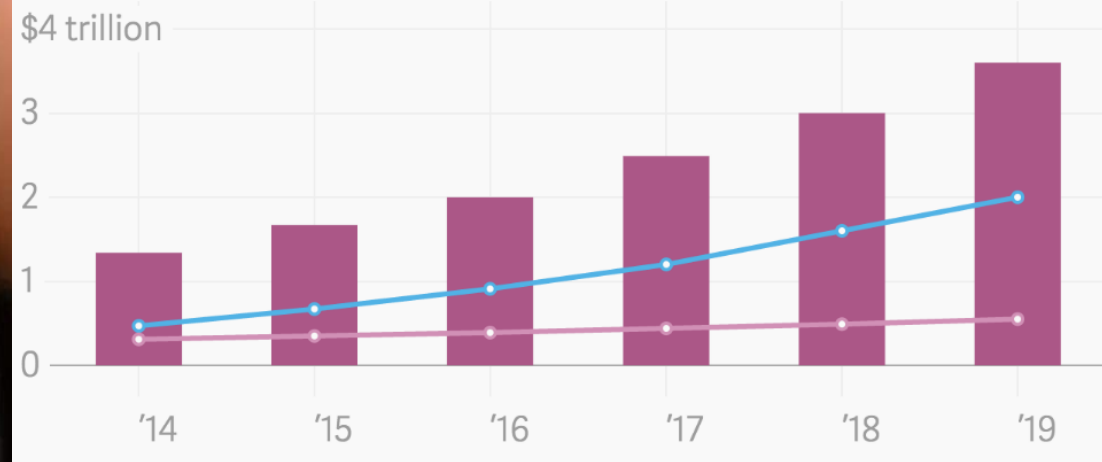


FACES



China is driving the boom in global e-commerce retail sales

■ Global total ■ China ■ US



China and Tech

THE GIANTS



China Times



Tech
Mobile
Speed



Pragmatic and Self-oriented
Healthy Conscious
Post 90s

Global brands vs Local
brands

Going Onward, Gen Z in China



GREEN *and* SOPHISTICATED



Eco-conscious, Luxury eco-resorts...escape from hectic urban life
“Another Me in this World”, CCTV program: Yang Fan travels to Europe to look for people born in the same day, month and year
Post ‘90s they want a free and creative lifestyle



We want a better LIFE

21% GLOBAL TRAVEL EXPENDITURES = CHINA

2018: 150 million
outbound travels +14.7%

WHEN:
February / April / July / August / November / December

WHERE: Asia-90%,
Europe 3.83%, North
America 2.44%, Oceania
1.26%, Africa 0.40%

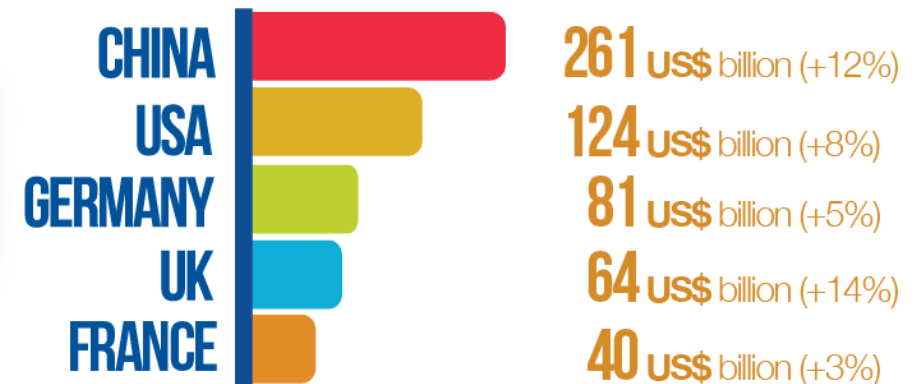
53% First-time overseas
travelers

55% Tour groups



WORLD'S TOP TOURISM SPENDERS

INTERNATIONAL TOURISM EXPENDITURE 2016



TECH Travellers



- 78% Leisure top priority
- Post '80s food+shopping, Post '90s adventure
- 53% Post '90s and alternative accommodation
- 2017 trip expenditure: US\$ 5,565 (+3% yoy)
- 86% local life: exhibition, concerts, sport events, bar and spa
- 65% mobile wallet (11% in the West): convenience, speed, familiarity

TOP 3: UK – Germany – France

Chinese in Europe 2018

Biggest increase: Croatia – Estonia – Hungary – Cyprus – Montenegro

+5.1% trips to EU
147% tailor-made trips: UK, Italy, France, Russia, Greece, Spain

Female travellers 60% of all, solo travelers are growing

2018 EU-China Tourism Year

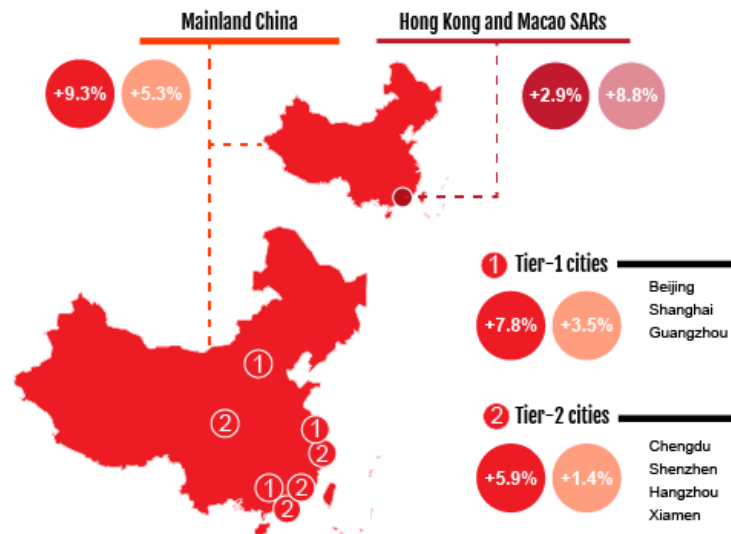
The first four months of EU-China Tourism Year (ECTY2018) registered a healthy performance for Chinese arrivals in Europe, thanks to the busy 2018 Chinese New Year period and the new air connections launched in the early spring. Tier-1 cities upheld a dominant position, but demand from Tier-2 cities and other mainland cities were stronger.

The upcoming four months of ECTY2018 (May-August) continue to see a Chinese preference for Europe. Bookings for arrivals in Europe are 7.2% ahead compared to last year's situation. This is slightly above the global average of 6.2%. The most outstanding forward booking situations are for trips to Belgium and Ireland.



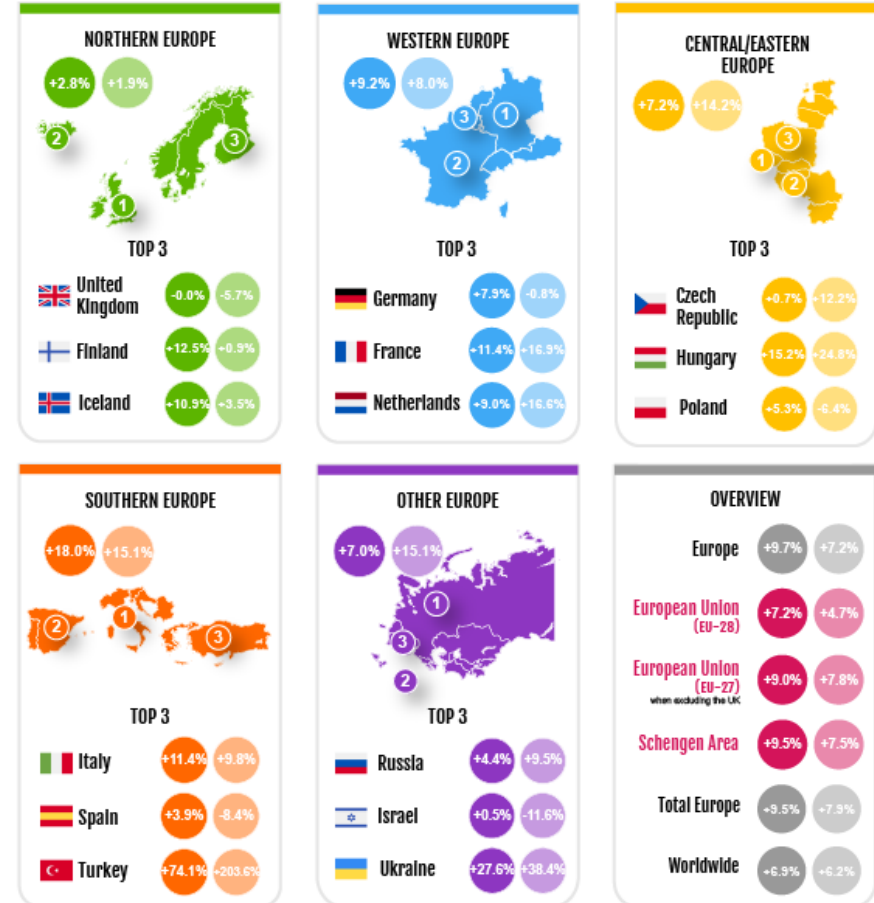
Chinese departures to Europe

History Jan-Apr 2018 & forward looking May-Aug 2018



2018 EU-China Tourism Year Chinese arrivals in Europe

History Jan-Apr 2018 & forward looking May-Aug 2018



GOING SOUTH

First Half 2019: +7.4%, 3 million trips

New Flight Routes + Exchange Rates + Visa Policies: Croatia +540%, Latvia +523%, Slovenia +497%, Ireland +220%, Denmark +212%

Destinations up: Montenegro, Serbia, Turkey, Malta

Trends: Travel Photography, Private Tours, Chinese Services, Green and Welcome Local Hotels



A screenshot of the ACCOR HOTELS.com website. The header includes the logo and navigation links like '查找酒店', '我们的优惠', '为人住做好准备', '专业方法', and 'LE CLUB ACCORHOTELS'. The main banner features a soccer ball and people celebrating, with the text '入住雅高酒店，欧洲杯比赛场地近在咫尺！' and '最后机会，仅剩几间'. Below the banner is a search bar with options for '国内酒店' and '海外酒店', and a search button.

SELECTED CHANNELS WHERE CHINESE TRAVELLERS SHARING EXPERIENCE DURING AND POST JOURNEYS REGULARLY



FIT in Europe

12 days – 2 countries – 350 Euro per day

Key Words: In depth travel – Slow pace –
Leisure travel – Private – Niche

SH/BJ/GZ/SZ + Chengdu, Chongqing, Xi'an,
Nanjing, Wuhan

Country by Themes: Romantic (Italy, France),
Food (IT,FR,SP)



Mobile Wallet in Travels

61% global mobile payments are Chinese

2018 – 60 billion mobile transactions (+61% yoy)

32% overseas payments

90% Alipay overseas

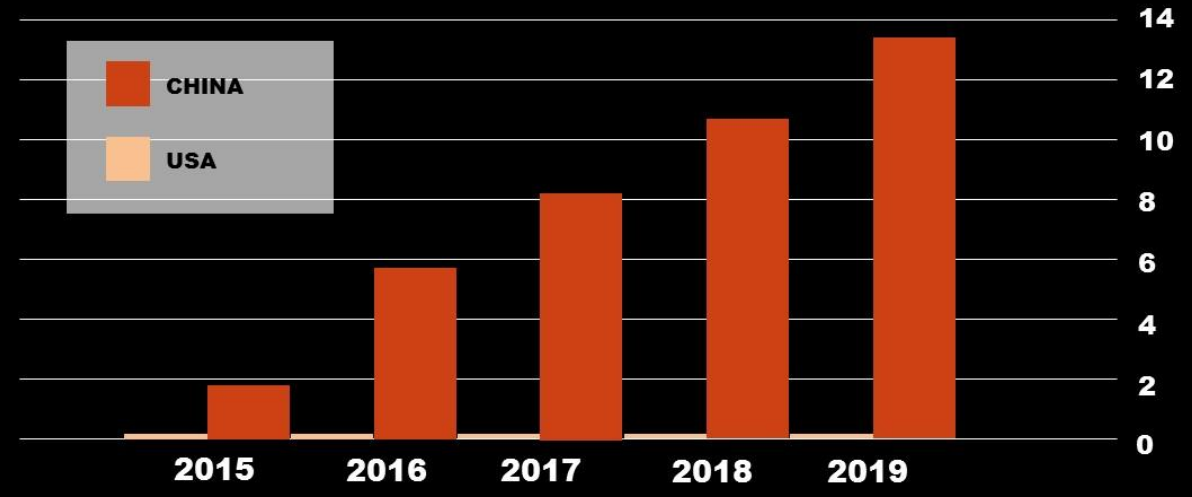
66% WechatPay overseas

Shopping+Food

Easy, Fast, Safe



3RD PARTY MOBILE PAYMENTS (\$TN)



Data Source: Forrester Research (US), iResearch (China)

CHINACHANNEL.CO



SUSTAINABLE TOURISM IS...

“Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities” Making Tourism More Sustainable – A Guide for Policy Makers, UNEP – UNWTO, 2005

+ “while simultaneously maintaining and contributing to the Outstanding Universal Value of a property” UNESCO Sustainable Tourism, 2014



UNWTO
World Tourism Organization

T.C.
KÜLTÜR VE TURİZM BAKANLIĞI
Republic of Turkey Ministry of Culture and Tourism

UNESCO
United Nations
Educational, Scientific and
Cultural Organization

Save the Date

**3rd UNWTO/UNESCO
World Conference on
Tourism and Culture**

Istanbul, Turkey
3-5 December 2018

WHY?

The need for sustainable planning and management is imperative for the industry to survive as a whole





IT'S OK:

1-Conservation of environmental and cultural assets

2-Support indigenous identity, foster pride in cultural traditions, avoid urban relocation

3-Increased tourism revenue as market demand is met from environmentally aware travelers

THANK YOU

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