



China



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China

Tourism in the economy

Tourism has a vital role in the national economy. In 2009, the State Council issued Document 2009-41, which highlights the government's aim to nurture the tourism industry as one of the strategic pillars of the national economy. In 2012, the tourism industry directly accounted for nearly 4% of GDP, and China National Tourism Administration (CNTA) expects this to reach 4.5% in 2015. The share of international tourism receipts in exports of services was 26%.

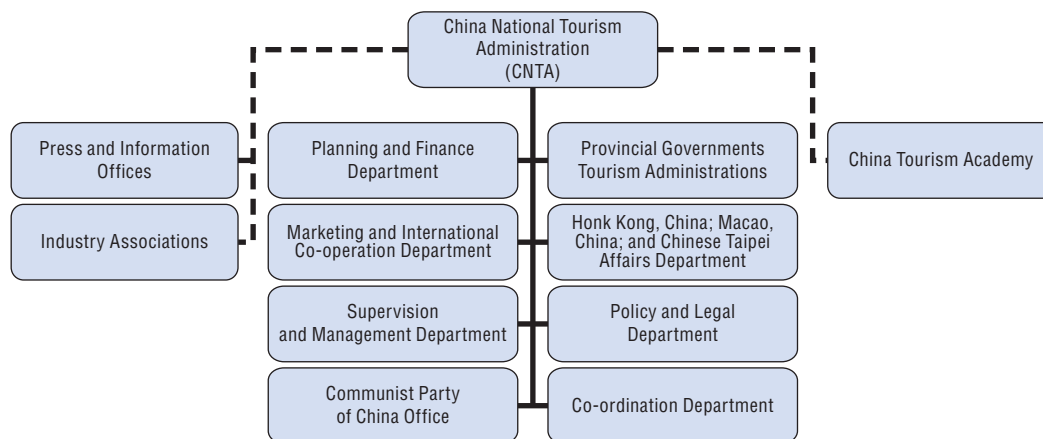
China's inbound tourism has seen little growth since the global financial crisis in 2008-09. In 2012, the country received 132.4 million inbound visitors – an average annual increase of 0.8% since 2008 (130 million visitors). Tourism export revenues in 2012 were USD 50 billion. However, Chinese outbound tourism has been growing rapidly and, in 2012, there was a deficit on the tourism balance of trade of USD 51.9 billion.

Domestic tourism is nevertheless by far the largest market for the Chinese tourism industry. In 2012, the domestic market reached 2.96 billion visits, with a year-on-year growth rate of over 12%. The domestic market generated revenue of CNY 2270.6 billion, accounting for 87.6% of total internal market revenues from tourism.

Tourism organisation and governance

China National Tourism Administration (CNTA) is the agency in charge of tourism, reporting directly to the China State Council (Figure 1). CNTA is composed of ten internal departments, five affiliated organisations and seven subordinate associations. CNTA has

Figure 1. **China: Organisational chart of tourism bodies**



Source: OECD, adapted from the China National Tourism Administration, 2014.

18 overseas offices in 14 countries and regions. Each province and city has its own provincial or municipal tourism administration with a similar structure to that of CNTA's internal departments.

Tourism budgets

In 2012, China National Tourism Administration's total budget was CNY 240.5 million. The main sources of funding for tourism development were the central and local governments – in part comprising allocations from the Tourism Development Fund made up from the CNY 20 charge imposed on all outbound travellers. This is known as the Civil Aviation Development Fee, formerly the Airport Construction Fee.

Tourism-related policies and programmes

In 2009, the State Council issued a policy document, “Views on Accelerating the Development of the Tourism Industry”, stating that the tourism industry had been earmarked to become one of the strategic pillars of the national economy, and that tourism would directly and indirectly contribute some 8% of GDP by 2015. The China State Council has since introduced a series of policies and measures to accelerate the development of the tourism industry and CNTA issued the “12th Five-Year Plan of Tourism Industry Development” in 2011.

In 2012, the Standing Committee of the National People's Congress proposed a draft Tourism Law, which was adopted by the legislature in 2013 and came into effect on 1 October 2013. This is the first time that China has set legislative guidelines for the tourism industry. The law aims to protect both tourists' and tour operators' rights and to make effective use of China's national resources. The government is supporting comprehensive reforms in tourism, and encouraging the integrated management of tourism resources.

In 2013, the State Council issued the “Outline for National Tourism and Leisure (2013-20)”, which aims to boost outbound tourism by encouraging companies to improve the use of paid leave.

The tourism administration is accelerating the functional transformation of the industry, devolving functions and activities that should be undertaken by private sector enterprises, industry associations and intermediate organisations and institutions. It is liberalising market access in tourism, removing industry and regional barriers, simplifying approval procedures, encouraging equitable social participation in tourism development, and encouraging enterprises to invest in the tourism industry with diverse forms of ownership.

CNTA is promoting the restructuring and reorganisation of state-owned tourism enterprises, supporting the development of privately owned, small and medium-sized tourism enterprises (SMEs), supporting various types of enterprises across sectors and regions, encouraging mergers, acquisitions and joint ventures, and cultivating a number of competitive large-scale tourism enterprises.

In addition, it is promoting improved visa access and faster processing, as well as other measures to facilitate inbound tourism, including tax-free shopping facilities for tourists, open skies air transport agreements, and more efficient procedures to handle cruise tourism.

In February 2012, the People's Bank of China, the National Development and Reform Commission and seven other departments issued a policy paper entitled: "A number of opinions on the financial support to accelerate the development of the tourism industry". Specific measures linked to this include:

- In 2012, the State Council approved the Ministry of Transport and other departments' proposals for toll-free access for small passenger cars, especially during the Mid-Autumn Festival and National Day holiday periods.
- CNTA and the China Tourism Academy (CTA) are jointly developing the "Chinese inbound tourism long-term plan", which is aimed at promoting the development of inbound tourism.
- CNTA is promoting the "National Intelligent Cities Pilot Project", under which local tourism authorities are accelerating the development of "intelligent tourism" – the adoption of modern information technology services.
- In 2012, CNTA started work on recommendations for a second batch of national standardisation pilot units, expanded a pilot project for comprehensive reform in tourism, issued advice about improving tourism public services, and launched a variety of special projects to improve the quality of tourism services. It has made breakthroughs in many aspects of tourism development.
- To strengthen international co-operation in tourism and to promote the recovery of inbound tourism, CNTA has undertaken some large-scale overseas promotional programmes, and organised the "China-Russia Tourism Year".
- Since 2009, CNTA has entrusted the CTA with tourist satisfaction surveys in 60 major tourist cities.

China has not been neglecting measures to promote sustainable tourism:

- In a policy paper issued in 2009, "Views on accelerating the development of the tourism industry", the State Council proposed that the consumption of water and electricity should be reduced by 20% over the next five years. Subsequently, specific requirements have been put forward for sustainable tourism development in Guangxi and Hainan provinces.
- Industry standards proposed by the central government, including "The standards for green tourist hotels" (LB/T 007-2006), "The guideline for the development of ecological tourism", and "The construction standards of the ecological tourism area", have greatly promoted high environmental standards in hotels and tourism facilities in scenic areas in China. "The year of eco-tourism" has twice been identified as the national annual tourism theme, in 1999 and 2009.
- Making full use of financial and tax incentives, multi-sectoral co-ordination mechanisms, and technological innovations in energy conservation and emissions reduction, are all regarded as essential for sustainable tourism development.

Statistical profile

Table 1. **China: Domestic tourism**

	Unit	2008	2009	2010	2011	2012
Total domestic trips	Thousand	1 712 000	1 902 000	2 103 000	2 641 000	2 957 000
Overnight visitors (tourists)		..	..	..	..	..
Same-day visitors (excursionists)		..	..	..	..	..
<i>Trips by main purpose of visit</i>						
Business and professional		..	..	..	..	..
Holiday, leisure and recreation		..	..	..	..	..
Nights in all means of accommodation		..	..	..	..	..
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Domestic travel receipts		..	..	..	..	..

Source: China National Tourism Administration.


StatLink  <http://dx.doi.org/10.1787/888932990083>

Table 2. **China: Inbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international arrivals ¹	Thousand	130 027	126 476	133 761	135 424	132 405
Overnight visitors (tourists)	Thousand	53 049	50 875	55 664	57 581	57 725
Same-day visitors (excursionists)	Thousand	..	..	..	..	74 680
Nights in all means of accommodation		..	..	..	..	..
Hotels and similar establishments		..	..	..	..	..
Other collective establishments		..	..	..	..	..
Total international receipts	Million USD	44 130	42 632	50 154	53 313	54 937
International travel receipts	Million USD	40 843	39 675	45 814	48 464	50 028
International passenger transport receipts	Million USD	3 287	2 957	4 340	4 849	4 909

1. Includes Hong Kong, China; Macao, China; and Chinese Taipei.

Source: China National Tourism Administration.


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Table 3. **China: Outbound tourism**

	Unit	2008	2009	2010	2011	2012
Total international departures	Thousand	45 844	47 656	57 387	70 250	83 183
Overnight visitors (tourists)		..	..	..	..	..
Same-day visitors (excursionists)		..	..	..	..	..
Total international expenditure	Million USD	40 987	47 108	59 840	79 010	109 898
International travel expenditure	Million USD	36 157	43 702	54 880	72 585	101 977
International passenger transport expenditure	Million USD	4 830	3 406	4 960	6 425	7 921

Source: China National Tourism Administration.


StatLink  <http://dx.doi.org/10.1787/888932990124>

Table 4. China: Enterprises in tourism
Thousand establishments

	2008	2009	2010	2011	2012
Total tourism enterprises
Tourism industries
Accommodation services for visitors
Hotels and similar establishments ¹	14	14	12	12	11
Food and beverage serving industry
Passenger transport
Air passenger transport
Railways passenger transport
Road passenger transport
Water passenger transport
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry ²	20	20	23	24	25
Cultural industry
Sports and recreation industry
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries

1. Star-rated hotels only.

2. Travel agencies.

Source: China National Tourism Administration, Tourism Statistics Yearbook.


StatLink  <http://dx.doi.org/10.1787/888932990140>


Table 5. China: Employment in tourism
Thousand employees

	2008	2009	2010	2011	2012
Total tourism employment (direct)
Tourism industries
Accommodation services for visitors
Hotels and similar establishments ¹	1 669	1 673	1 581	1 541	1 591
Food and beverage serving industry
Passenger transport
Air passenger transport
Railways passenger transport
Road passenger transport
Water passenger transport
Passenger transport supporting services
Transport equipment rental
Travel agencies and other reservation services industry ²	322	341	277	300	318
Cultural industry
Sports and recreation industry
Retail trade of country-specific tourism characteristic goods
Other country-specific tourism industries
Other industries
<i>Gender breakdown</i>					
Male (% of total tourism employment)
Female (% of total tourism employment)

1. Star-rated hotels only.

2. Travel agencies.

Source: China National Tourism Administration, Tourism Statistics Yearbook.

StatLink  <http://dx.doi.org/10.1787/888932990159>

For more information

China National Tourism Administration
China Tourism Academy

www.cnta.gov.cn
www.ctaweb.org