UNWTO World Tourism Organization

GLOBAL TOURISM ECONOMY RESEARCH CENTRE
世界旅遊經濟研究中心
CENTRO DE PESQUISA ECONOMIA GLOBAL DE TURISMO

UNWTO / GTERC Asia Tourism Trends

2019 Edition

UNWTO/GTERC

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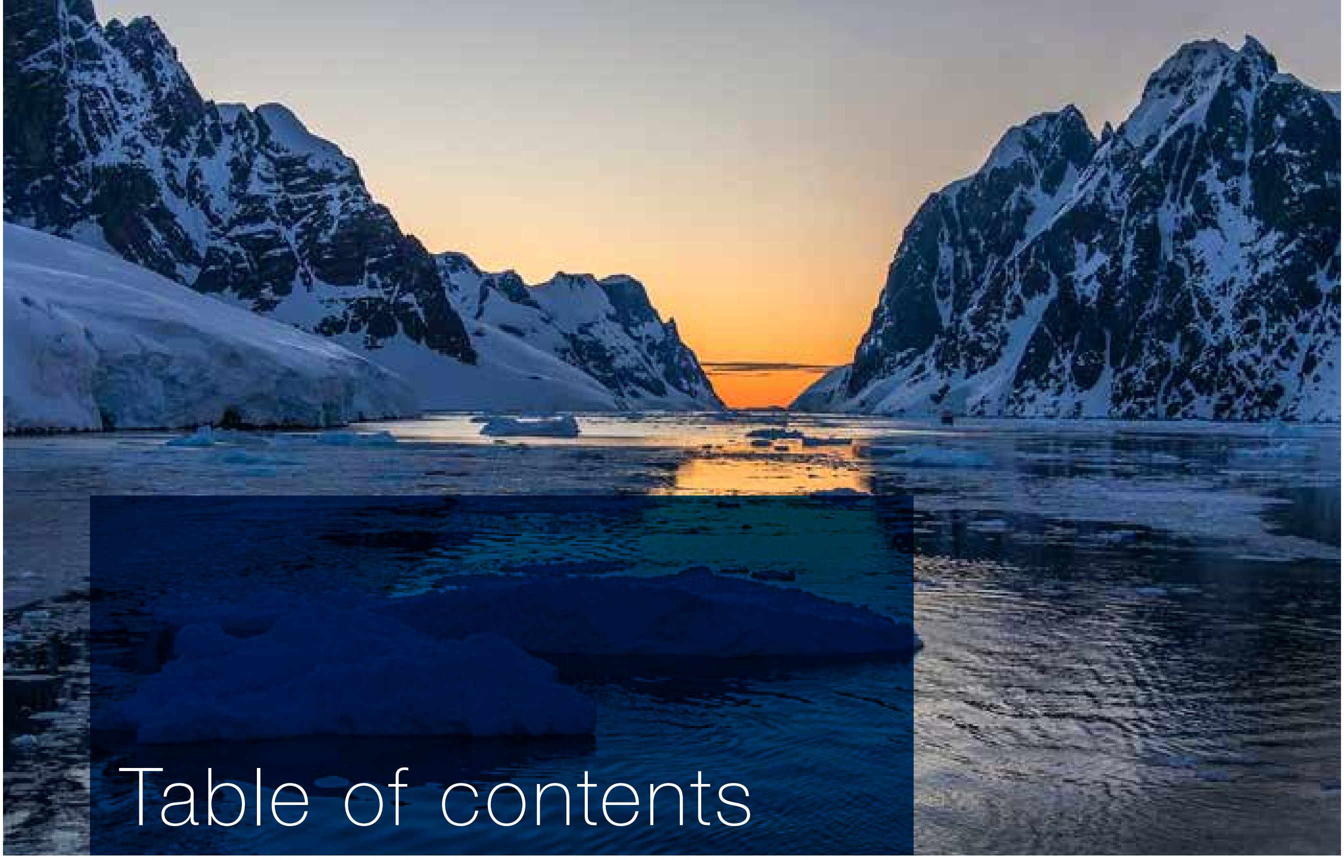

Table of contents

Foreword

Zurab Pololikashvili

Secretary-General,
World Tourism Organization (UNWTO)

2018 marked another strong year for tourism with international tourist arrivals reaching 1.4 billion two years ahead of UNWTO's long-term forecasts. In addition, tourism generated USD 1.7 trillion in export earnings, or almost USD 5 billion a day. For the seventh consecutive year, tourism exports (+4%) grew faster than merchandise exports (+3%), consolidating the sector as one of the pillars of our economies.

Asia and the Pacific has maintained its position as the fastest-growing tourism region in the world. As economies across the region continued to perform strongly, the number of tourists from Asia and the Pacific making international journeys tripled between 2000 and 2018, while worldwide, total numbers doubled over the same period. In total, the region accounted for 348 million arrivals in 2018, or one-fourth of the worldwide total.

Much of this growth continued to be fueled by China, the top source market in the world, both in terms of number of trips abroad taken and on the amount of money spent by tourists from the country. The number of outbound trips by Chinese citizens showed an average growth rate of 16% each year between 2000 and 2018, reaching a total of 150 million last year.

Such potential is yet to be fully maximized, however, particularly among destinations in other regions such as South America. This report, with its special emphasis on Brazil and Argentina, shows that though the numbers are still relatively small compared to other destinations, inhibited by distance and cost, the yield of Chinese tourists is much greater as tours usually cater to an affluent class of travellers mainly from the first-tier cities of Beijing, Shanghai and Guangzhou.

The report concludes with an overview of the growing segments of health and sports tourism, both driven by the growing pursuit of wellbeing of travellers in the region. While Asian countries have been pioneers in medical and wellness tourism, sports tourism, though more recent, is gaining immense traction.

Ranging from mega events such as the Olympic Games (Japan will host the Summer Olympics in 2020 and China the Winter Olympics in 2022), to E-sport, that brings together leisure and technology and caters to a wide and aspiring clientele of Asian enthusiasts or to simple events like marathons, walking tourism and cycling tourism, sports tourism represents a growing value to destinations across Asia.

I trust that this 2019 *Asia Tourism Trends* report, like the preceding editions, will provide key insights to better understand tourism in the region and to benefit from its immense development potential.

I take this opportunity to thank the Global Tourism Economy Research Centre (GTERC), and in particular its Chairman, Pansy Ho, for their continuous partnership with UNWTO and their commitment to advancing tourism research in the region for the benefit of all.

Foreword

Pansy Ho

Chairman, Global Tourism
Economy Research Centre (GTERC)

This *Asia Tourism Trends, 2019 Edition* is the sixth year of collaboration between the Global Tourism Economy Research Centre and the UNWTO. Each year, this project gives us a new opportunity to reflect on and celebrate the great strides made in tourism, both in Asia and around the world.

With a new record of 1.4 billion international tourist arrivals, tourism continues to maintain its position as one of the fastest-growing economic sectors in the world. As this report highlights, Asia is a hotbed of tourism growth. In just under two decades, Asia's share of international tourist arrivals went from 16% of the world total (in 2000) to 25% (in 2018), with a record 348 million arrivals to the region in 2018.

As the landscape of global tourism and leisure continues to evolve, travellers' demand for diverse and authentic experiences is on the rise. This has stimulated the emergence and expansion of tourism segments focused on areas such as health, wellness and sports. Asia's rich cultural and natural-healing traditions and resources, state-of-the-art facilities and services from both the private and public sectors translate into a booming wellness tourism industry for the region. Sports tourism, which ranges from spectating at mega-events to participating in physical activities, opens up opportunities to attract new consumer segments and investments in respective infrastructure. Moreover, the technological innovations involved in events such as e-sports, reminds us that tourism is ever evolving and has created new opportunities for destinations to expand their tourism offerings that are beyond the realms of traditional tourism products.

In terms of outbound tourism, 2018 was the ninth consecutive year of robust growth, with Asian travellers, particularly Chinese, contributing greatly to this global phenomenon. Between 2010 and 2018, Asian outbound travel increased by an astounding 75% on aggregate. As Chinese travellers continue to explore the world, South America has emerged as an appealing destination. Two countries that have stood out, especially in terms of their policies designed to welcome more visitors, are Argentina and Brazil. The new flow of tourism between China and these countries will certainly be the foundation of international collaboration.

This report, like past editions, showcases the exciting tourism trends in Asia and puts them into a context that highlights tourism as a global transformative force that empowers communities and improves livelihoods. Behind the charts and numbers are real people and communities feeling the positive ripple effects of tourism.

Once again, I would like to express my gratitude to the Secretary-General of the UNWTO, Mr. Zurab Pololikashvili, and his team for their steadfast and valuable support in this project.

Acknowledgements

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From the Tourism Market Intelligence and Competitiveness Department, Mr. Javier Ruescas led the research work of chapter 1 on *Tourism trends and outlook,* while Mr. Shuichi Kameyama undertook the study on chapter 4 on *Sports tourism in Asia.* Mr. Michel Julian and Mr. Javier Ruescas oversaw the drafting, editing and revision of the various components of the report coming under their purview.

From the Regional Department for Asia and the Pacific, Mr. Omar Nawaz and Ms. Hyeon-Jin Lee contributed to drafting, editing and revision of the overall report.

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Mr. Wang XinJun, Ph.D., CEO, Ivy Alliance Tourism Consulting; Ms. Wang Chunling, Director, Market Research, Ivy Alliance Tourism Consulting; and Mr. Alexander Rayner of SmartData.Travel.

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Mr. László Puczkó, Ph.D., and Ms. Melanie Smith, Ph.D., of Health Tourism Worldwide.

Executive summary

In the 6th year of publication the *UNWTO/GTERC Asia Tourism Trends, 2019 Edition* comprises four specific chapters. As in the past editions, chapter 1 is dedicated to international tourism trends in Asia and the Pacific in their global and regional dimensions, with an overview of the region's socioeconomic environment.

Chapter 2 highlights the potential of the Chinese outbound tourism market, the largest in terms of numbers and expenditure in the world, to South America with special emphasis on Argentina and Brazil.

The third chapter focusses on health tourism in Asia, including both wellness and medical tourism that are of current interest and also form lucrative markets for both Asians, as well as international visitors.

The final chapter is related to sports tourism in Asia. While Asia has the potential to organize mega events to match those of the rest of the world such as the Summer Olympic Games which was held in China in 2008 with the 2020 event scheduled to be hosted by Japan, the chapter examines the role of sports tourism and its impact on Asian society especially in relation to the SDGs.

Tourism trends and outlook

International tourism grew by 5% in 2018 to reach 1.4 billion international tourist arrivals. This is two years ahead of UNWTO's long term forecast issued in 2010, which projected the 1.4 billion mark for the year 2020. Sustained growth of 4% or more for the past nine years explains this early milestone. Results were driven by a favourable economic environment, strong outbound demand from major source markets and increasing air connectivity. Asian markets fuelled much of this growth with over half a trillion US dollars spent on international tourism in 2018, over one-third of the world total.

Role of Asia and the Pacific

Asia and the Pacific plays a central role in global tourism, both as a destination region and an outbound market. In 2018 Asia recorded 7% growth in international tourist arrivals to reach a total of 348 million, one-fourth of the world's total. This share has increased from 16% in 2000 to 25% in 2018.

The region also earned USD 435 billion in international tourism receipts in 2018, accounting for 30% of the world total. Overall export revenues from international tourism (including passenger transport) reached USD 480 billion in Asia. This represents 32% of the region's services exports and 6% of its overall exports of goods and services.

Outbound travel from Asia and the Pacific, measured as arrivals in destinations, reached 359 million in 2018, increasing by 7% from 2017. It was the ninth consecutive year of robust growth in outbound tourism, since the 2009 global economic crisis. Asian travellers spent USD 524 billion on international tourism in 2018, some 36% of the world total, up from 24% in 2010, following several years of double-digit growth.

This expansion is attributable to the strong economic conditions prevailing in most of the region, combined with the rapid urbanization, large infrastructure development, growing air connectivity and rise of an affluent middle class in large emerging economies.

Socioeconomic environment

Asia boasts the largest economy in the world

- Asia and the Pacific is the world's largest region in economic terms, with a combined GDP of nearly USD 30 trillion, or 35% of the world's economic output.
- The region's economy has seen the fastest growth of all world regions between 2000 and 2018, enjoying 5% or higher GDP growth almost every year since 2000, largely driven by China.
- China is the largest economy in Asia and the second largest in the world, accounting for 45% of Asia's economic output and 16% of the world's.
- In 2016 the combined GDP of Asia surpassed that of the Americas (in US dollar terms) for the first time in the historical series.
- Income levels have surged in Asia and the Pacific since the turn of the century, with the region's GDP per capita more than doubling, from USD 2,700 in 2000 to USD 7,000 in 2018, an increase of 160%.
- Asia and the Pacific is also the world's most populous region, with 4.2 billion inhabitants, or 56% of the population on the planet.
- Rapid economic growth in a region with over half the world's population, coupled with rising air connectivity, infrastructure development, travel facilitation and promotion have boosted international travel within Asia, as well as to and from other world regions.

Inbound tourism

Asia and the Pacific enjoyed 7% growth in international arrivals in 2018

- International tourist arrivals (overnight visitors) increased 5% in 2018 to reach 1.4 billion globally. This is two years ahead of UNWTO's long term forecast issued in 2010, which projected the 1.4 billion mark for the year 2020.
- International arrivals in Asia and the Pacific increased 7% to reach a total of 348 million in 2018, one-fourth of the world's total.
- Asia and the Pacific is the second most visited region in the world after Europe and has seen the fastest growth in recent years. Between 2010 and 2018 arrivals in Asia increased an average 7% per year, compared to the world average of 5%, outperforming all world regions.
- Almost half of Asia's international tourist arrivals in 2018 were recorded in North-East Asia (49%), while 37% were recorded in South-East Asia, 9% in South Asia and 5% in Oceania.
- Between 2010 and 2018, South Asia and South-East Asia were the fastest-growing subregions in the world, with 10% and 8% average annual growth respectively.
- The world's top ten ranking by international arrivals features two Asian destinations: China (4th) with 63 million arrivals and Thailand (9th) with 38 million.

Asia and the Pacific accounts for 30% of the world's international tourism receipts

- Asian destinations earned USD 435 billion in tourism receipts in 2018, or 30% of the world total, a share that has almost doubled since 2000 (17%).
- In 2018, international tourism receipts in Asia increased by 7% in real terms, with growth led by South Asia (+10%) and North-East Asia (+9%).
- North-East Asia represents 43% of the region's international tourism receipts, South-East Asia 33%, Oceania 14% and South Asia 10%.
- The largest tourism earners in Asia are Thailand, Australia, Japan, China and Macao (China).

- Asian destinations earn an average USD 1,250 from every international tourist (arrival), above the world average of USD 1,040.

Top destinations in Asia and the Pacific

- China is the top destination in Asia and the Pacific with 63 million international arrivals in 2018, followed by Thailand (2nd) with 38 million and Japan (3rd) with 31 million. China and Thailand are also featured in the world's top ten ranking in fourth and ninth place respectively.

- The next largest Asian destinations are Hong Kong (China), Malaysia, Macao (China) and India.

- Ranked by international tourism receipts, Thailand is the top earner in Asia with USD 63 billion recorded in 2018, Australia is second with USD 45 billion and Japan third with USD 41 billion. These destinations are respectively fourth, seventh and ninth in the world ranking of tourism earners.

Inbound tourism by region of origin

Nearly 80% of international arrivals in Asia originate in the region.

- Intraregional tourism predominates in Asia and the Pacific, with 79% of the region's international tourist arrivals originating in Asia itself, while 18% originates in other world regions (interregional), mostly in Europe (11%) and the Americas (6%). (For a small percentage of arrivals the origin is not specified.)

- In 2018 intraregional tourism was highest in North-East Asia, where 88% of arrivals originated in Asian source markets. This share was 81% in South-East Asia and 72% in Oceania. This proportion is lowest in South Asia, where only 33% of international arrivals originate in Asia. About 44% of arrivals in South Asia come from other regions, mostly Europe (26%).

- Europe remains the largest source of interregional tourism for Asia and the Pacific, accounting for 11% of all arrivals and 57% of arrivals from outside the region. This is explained by the surging popularity of Asia Pacific destinations among European travellers, as well as growing trade and investment between both regions.

Outbound tourism

- Outbound travel from Asia and the Pacific – measured in arrivals recorded in destinations worldwide – reached 359 million in 2018, a 6% increase from 2017.

- It was the ninth consecutive year of robust growth in outbound tourism, since the 2009 global economic crisis. Asian outbound tourism has grown an average 7% per year between 2010 and 2018, or 75% on aggregate.

- Intraregional travel (within the region) accounts for 76% of all Asian outbound travel, while interregional travel (to other regions) represents the remaining 24%.

- North-East Asian destinations account for 41% of all intraregional arrivals (originating in Asia), much of which is generated by the subregion itself. A large part of this travel takes place between mainland China and Hong Kong (China) and Macao (China).

- Interregional travel (to other regions) represents 24% of all arrivals generated in Asia, and grew by 7% increase last year, reflecting solid demand for long-haul travel, particularly to the Middle East.

- Between 2010 and 2018 Asian outbound travel increased by 75% overall. Travel to destinations outside Asia (+97%) exceeding growth in travel to destinations within Asia (+69%).

Asia and the Pacific travellers spent USD 524 billion in 2018

- Travellers from Asia and the Pacific (both overnight and same-day) spent USD 524 billion on international tourism in 2018, about 36% of the world total. This proportion has increased from 24% in 2010 as a result of several years of rapid growth.

- China is the world's top source market after double-digit growth in spending every year between 2004 and 2015. Chinese expenditure reached USD 277 billion in 2018, based on travel export data from the balance of payments.

- Spending by Chinese travellers grew by 5% (in real terms) in 2018, an increase of nearly USD 20 billion from the previous year. China now accounts for more than half of Asia's tourism expenditure and generates almost one-fifth of the world's international tourism receipts.

- Australia is the 2nd largest tourism spender in the region, with USD 37 billion reported in 2018. The Republic of Korea, Hong Kong (China) and Singapore are the next largest spenders. These four markets combined represent 23% of international tourism expenditure in Asia and the Pacific.

- Chinese travellers made 150 million trips abroad in 2018 (total departures including same-day trips), much of which to Hong Kong (China), Macao (China) and other destinations in Asia and the Pacific.

- Relative to the region's population, tourism expenditure in Asia is still low, with an average USD 125 per inhabitant (travellers and non-travellers), compared with a worldwide average of USD 193 in 2018. This figure reflects the region's huge population, but also the great potential for growth in international travel.

- There are however, large differences in spending per capita across Asian subregions. Oceania has the highest average spending per inhabitant (USD 1,000) partly due to the remoteness of Australia, New Zealand and other island nations, while the average is USD 230 in North-East Asia, USD 120 in South-East Asia and only USD 14 in South Asia.

Tourism prospects

International tourist arrivals up 4% in the first half of 2019

- International tourist arrivals (overnight visitors) grew 4% in January–June 2019 compared to the same period last year. This is slightly below the 5% increase in 2018, though in line with the ten-year average of 4% per year in 2008–2018.

- Growth in the first half of 2019 was led by the Middle East (+8%) and Asia and the Pacific (+6%), followed by Europe (+4%) and Africa (+3%). The Americas (+2%) saw more moderate growth this period.

- By subregions, the Caribbean (+11%) enjoyed the highest growth, followed by North Africa (+9%), South Asia and North-East Asia (both +7%).

- Results from Asian destinations are so far strong this first half of 2019, with solid growth in international arrivals reported by the Republic of Korea, Viet Nam, Macao (China) and Malaysia among others.

- From an outbound point of view results are mixed so far, with robust growth in international tourism expenditure from Japan, Thailand, Singapore and Australia among others, and declines from the Republic of Korea and China.

- International arrivals in Asia and the Pacific are forecast to grow by 5% to 6% in 2019, one of the highest growth rates across world regions.

- Confidence in global tourism remains positive yet cautious overall, with signs of moderate growth in the remainder of the year, according to the latest UNWTO Confidence Index survey.

Chinese outbound tourism to South America

China currently is the number one source market in the world in terms of both trips abroad and international tourism expenditure. The number of outbound trips by Chinese citizens showed an average growth rate of 16% each year between 2000 and 2018. The market is described as mature and diverse. Fully independent travellers (FITs), in a majority composed of millennials, dominate the Chinese outbound market which is greatly influenced by technological progress: China had a volume of 817 million internet users in 2018 and programmes such as Weibo and WeChat are extremely influential in tourism decision making today. While the bulk of the outbound market has been to neighbouring destinations, the sheer volume and potential of the Chinese outbound tourism market has not been lost on other destinations and this includes countries in South America. The chapter draws attention to the continent as a whole with specific references to Argentina and Brazil.

The South American market for China outbound visitors is inhibited by a lack of direct flights. Due to the distances and consequently time involved in flying from China to South America, surpassing 24 hours, most tours are either with one connection (68%) or two connections (32%). The package tours or even the tailor made ones, include multi-destinations are of a duration of 14 to 19 days. These tours cater to a specialized clientele of upper middle-class travellers and retirees originating from the first-tier cities in China (Shanghai, Beijing and Guangzhou) who have the time and means to travel. They are also seasoned travellers having visited other destinations in the past. The average cost of a trip to South American destinations ranges from USD 5,700 to USD 7,200 which is twice that of regular tour products to Europe and North America. However, despite these hurdles, the demand by Chinese outbound tourists for travel to South America is growing rapidly with an increase of 13% for Argentina, receiving 60,000 visitors in 2017 compared to 54,000 in 2016, and Brazil that showed a 7.1% growth in 2017 with 61,250 visitors. Another striking feature is the demand by Chinese tourists to visit the Antarctic: the number of Chinese tourists to Antarctica has been increasing year by year, with China becoming the second largest source of tourists in the world. Ctrip has predicted that the number of Chinese tourists visiting Antarctica during the 2018/2019 Antarctic tourism season will exceed 10,000.

The South American market is characterized by its novelty and exoticism. Sports in general and football in particular have been a great image builder, with Brazil and Argentina being the biggest beneficiaries. Natural and cultural assets of not only the two destinations but also of neighbouring countries that make up the multi-destination packages add value to the product. From the point of view of policy and promotion Argentina and Brazil have been extremely proactive with easing of visa procedures and innovative marketing of their respective destinations in China. From a small base compared to traditional markets that provide larger numbers, Argentina and Brazil have opted for greater yields by targeting the high-end Chinese travellers.

Health tourism in Asia

Travelling for health purposes is a global tourism trend. Numerous countries have identified health, medical, and wellness tourism as a key development area for the near or distant future. The wellness movement has become mainstream both at the individual and the corporate levels, and the health-care industry is considered now to be of strategic interest and priority. Various social, political, economic factors, as well as technological innovations shape the demand as well as the supply of wellness and medical services. In this report, the term *health tourism* is the umbrella term for the subtypes: wellness tourism and medical tourism.

Health tourism is not a new phenomenon or tourism product to many Asian countries. Both in medical and wellness tourism certain Asian providers have been the pioneers of the global health tourism movement. The Global Wellness Institute estimated that the top five wellness tourism markets in terms of international and domestic trips were China, India, Japan, the Republic of Korea and Thailand. China itself was estimated to have over 70 million arrivals/trips a year, whereas in the case of Thailand this number was 12.4 million. There is a high demand for complementary and alternative therapies and holistic treatments in Asia, which is a reflection of the rich spiritual resources and traditions of the region.

The vast majority of international medical tourism services in Asia are operated by private businesses. However, the role of governmental bodies as well as cooperation between the public and private sector play a significant role in a country's position, competitiveness and performance in medical tourism. Asia has also been known as a world leader in medical tourism for more than ten years, especially Singapore, Thailand, India, the Republic of Korea and Malaysia. The market has been growing quickly and now includes several other aspiring countries, such as the Philippines and Viet Nam. One of the fastest growing medical tourism destinations at present in Asia is the Republic of Korea, which is rooted in medical technologies, the relatively competitive prices for highly skilled surgeries and the strong government support. It is still considered that medical tourism is the most profitable segment of the health tourism industry in Asia.

Asia is at least as much well-known and as attractive for wellness tourism as it is for medical tourism. India, especially Kerala has long been the key destination for those interested in holistic services such as meditation or yoga. Bali has become a must visit destination for spiritual travellers as well as luxury spa resort enthusiasts. Australia's Byron Bay has long been a favoured hideaway for travellers looking for small-scale holistic experiences. China has significant resources, as well as plans for developing health tourism. Most of these plans are part of the China's Belt and Road Initiative (BRI). This initiative supports the development of new hospitals in the Belt and Road Health Corridor, many with international patient centres. The BRI has plans for creating 30 centres by 2020 to provide Traditional Chinese Medicine medical services and education, and to spread its influence.

It is clear that Asian countries are now considered as generating countries, as well as receiving destinations both in medical and wellness tourism. This is certainly a change to the former one directional industry development and guest flow. The rich cultural and natural healing traditions and resources, the state-of-the-art health care, as well as IT technology solutions combined with sound support by governmental bodies can mean a bright future in international health tourism and health care in many Asian countries.

Sports tourism in Asia

Tourism and sports are interrelated and complementary. Sports tourism is a vast field and is one of the most dynamic sectors in tourism. Democratization of travel, lifestyle evolution and greater media exposure have led to more and more tourists taking an active interest in sport activities during their trips either as participants or as avid spectators of sporting events. As demand grows, an increasing number of destinations in Asia are developing sports-based tourism as a means to attract new segments, tackle seasonality, boost infrastructure or reinforce their image. Technology is changing the way in which sports is experienced.

In Asia, three consecutive Olympic and Paralympic Games were or will be held:

1. The PyeongChang Winter Games 2018;

2. The Tokyo Summer Games 2020; and

3. The Beijing Winter Games 2022.

Mega sport events such as the Olympic and Paralympic Games bring various positive impacts on tourism of the host city or nation. An increase in visitor arrivals and spending during the event is expected in the first place. However, the benefits of a mega sport event are not limited to one-off, short-term impacts. They can and should also have mid- to long-term effects as a catalyst for development and change.

Mega sport events are a golden opportunity for tourism development, but not all destinations can afford or want to host one. Therefore, local sport events such as walking activities, marathons, cycling races, surfing competitions and school sport events are a good means for tourism development and a more beneficial tool for smaller destinations.

Another type of large-scale event is e-sport (electronic sport) and involves competitions in computer and video games. Hosting an e-sport event brings the same benefits as other events. International e-sport events are broadcasted worldwide to a wide audience and high exposure of the destination can be expected: they draw media attention, can raise awareness of the destination and position it in association with e-sport's values such as fun, youth, technology and innovation, thus attracting new segments.

As travellers demand more diversified, new, unique, authentic sport experiences during their trips, destinations and tour operators need to offer products that meet these demands to remain competitive. Examples of diverse tourism products include marathon events, cycling tourism and walking tourism. Additionally, innovation and technology are key to enhance the customer journey before, during and after travel. Sports tourism is no exception and there are many possibilities to utilize technology such as information and communication technology, mobile applications, Internet of things, virtual reality, augmented reality, and artificial intelligence, including facial recognition, chatbots and robots to increase the competitive edge of sports tourism.

Finally, sports and tourism complement one another, and create new synergies in the attainment of the United Nations Sustainable Development Goals (SDGs). Sports tourism development opens opportunities to any destination not only through the organization of mega sport events but also thanks to the increasing global consumer demand for active holidays. Today's travellers desire to experience a destination in an authentic way coupled with the growing popularity of active tourism means that sports tourism is more relevant than ever for both destinations and travellers.

1 Tourism trends and outlook

1.1 Socioeconomic environment

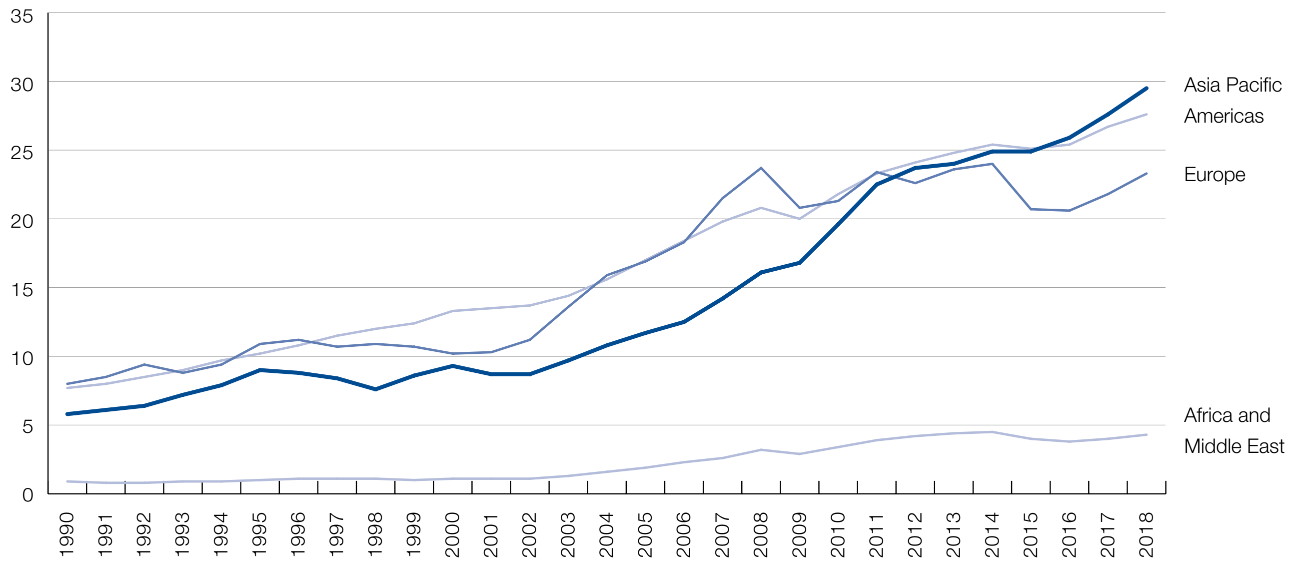
Asia and the Pacific's economy is the largest in the world

Asia and the Pacific is the world's largest region in economic terms (measured in United States dollars – USD) after recording the strongest growth of all world regions in the last two decades. Its combined gross domestic product (GDP) grew 5% or more nearly every year since 2000 and surpassed that of the Americas in 2016 for the first time in the historical series, according to data from the International Monetary Fund (IMF).[1]

In 2018, Asia's GDP reached nearly USD 30 trillion, which represents 35% of the world's economic output.

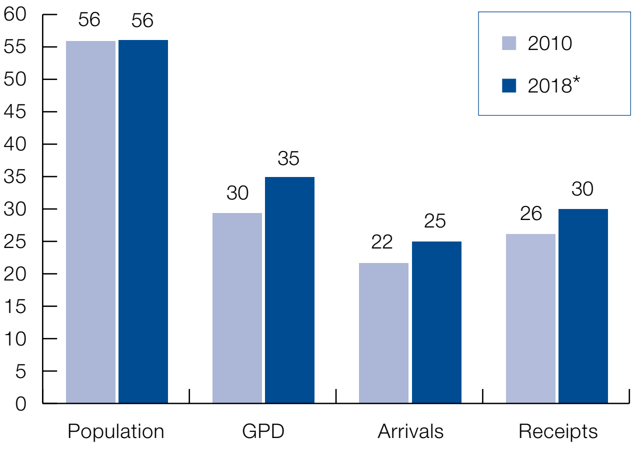
With a population of 4.2 billion inhabitants, Asia is also the world's largest region in demographic terms, accounting for more than half of the population on the planet (56%).

Figure 1.1 Gross domestic product (GDP) of world regions, 1990–2018 (USD trillion)



Source: Compiled by UNWTO from International Monetary Fund, *World Economic Outlook (2019).*

Figure 1.2 Asia Pacific's share in world gross domestic product (GDP), population, arrivals and receipts (%)



Source: Compiled by UNWTO from International Monetary Fund, *World Economic Outlook (2019)* and UNWTO 2019 data. * Provisional data.

Africa, the Americas and Europe are home to roughly one billion inhabitants each, and the Middle East to about 0.3 billion.

Asia and the Pacific consists of both advanced and developing economies of varying sizes and income levels. Japan, the Republic of Korea and Australia are industrialized countries with high GDP per capita and usually lower growth rates, while China and India are large emerging economies with huge populations and a recent history of strong economic growth. This expansion has been fuelled by market liberalization, large infrastructure development and rising middle classes.

In 2018 the economy of Asia and the Pacific grew 5.2%, with China (+6.6%) and India (+7.1%) contributing the most to the region's growth in US dollar terms.[2]

China is the world's second largest economy

With a GDP of USD 13 trillion, China is the largest economy in Asia and the second largest in the world, after rapid expansion in the last two decades. It now accounts for 45% of Asia's economic output and 16% of the world's. China's GDP has grown in double digits continuously from 2003 to 2008 and well over 6% every year since 1991. In 2018 China's GDP grew 6.6% and is forecast to grow 6.3% in 2019 according to the IMF.[3]

Japan is Asia's second largest economy and the world's third largest, accounting for 17% of the region's output. India is number 3 in the region and 7th globally and contributes 9% to regional GDP.

Income levels have surged in Asia and the Pacific since the turn of the century, with the region's GDP per capita more than doubling, from USD 2,700 in 2000 to USD 7,000 in 2018, an increase of 160%. By subregions,

Table 1.1 Population and GDP by (sub)region

	Population					Gross domestic product (GDP)					GDP per capita				
	(billion)				Share (%)	(USD trillion)				Share (%)	(USD)				Growth (%)
	2000	2010	2017	2018	2018	2000	2010	2017	2018	2018	2000	2010	2017	2018	10-18
World	**6.1**	**6.9**	**7.4**	**7.5**	**100**	**33.8**	**66.0**	**80.1**	**84.7**	**100**	**5,590**	**9,620**	**10,790**	**11,290**	**17.4**
Advanced economies[1]	1.0	1.0	1.1	1.1	14.2	26.8	43.2	48.4	51.1	60.3	27,810	42,210	45,580	47,940	13.6
Emerging economies[1]	5.1	5.8	6.4	6.4	85.8	7.1	22.8	31.8	33.6	39.7	1,390	3,900	4,990	5,220	33.8
By UNWTO regions:															
Asia and the Pacific	**3.5**	**3.9**	**4.2**	**4.2**	**55.9**	**9.3**	**19.6**	**27.6**	**29.5**	**34.8**	**2,670**	**5,050**	**6,640**	**7,030**	**39.2**
North-East Asia	1.5	1.6	1.6	1.6	21.8	7.2	13.6	19.4	21.0	24.8	4,790	8,610	11,930	12,860	49.4
South-East Asia	0.5	0.6	0.6	0.6	8.6	0.6	2.0	2.8	2.9	3.5	1,240	3,380	4,320	4,510	33.4
Oceania	0.03	0.04	0.04	0.04	0.6	0.5	1.4	1.6	1.7	2.0	14,980	39,130	39,330	39,550	1.1
South Asia	1.4	1.7	1.8	1.9	24.9	1.0	2.6	3.8	3.9	4.6	700	1,540	2,050	2,090	35.7
Europe	**0.9**	**0.9**	**0.9**	**0.9**	**12.2**	**10.2**	**21.3**	**21.8**	**23.3**	**27.5**	**11,800**	**23,890**	**23,890**	**25,410**	**6.4**
Americas	**0.8**	**0.9**	**1.0**	**1.0**	**13.4**	**13.3**	**21.8**	**26.7**	**27.6**	**32.5**	**15,880**	**23,300**	**26,770**	**27,430**	**17.7**
Africa	**0.7**	**0.9**	**1.1**	**1.1**	**15.2**	**0.5**	**1.7**	**1.9**	**2.0**	**2.4**	**720**	**1,770**	**1,730**	**1,780**	**0.6**
Middle East	**0.2**	**0.2**	**0.2**	**0.3**	**3.3**	**0.6**	**1.7**	**2.0**	**2.3**	**2.7**	**3,580**	**7,800**	**8,370**	**9,220**	**18.2**

1 Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF *World Economic Outlook*, April 2017, page 175, at: www.imf.org/external/ns/cs.aspx?id=29.

Source: Compiled by UNWTO from International Monetary Fund, *World Economic Outlook* and World Tourism Organization (2019).

South-East Asia (+260%) and South Asia (+200%) have seen the highest growth, with GDP per capita at least tripling.

Developing economies in particular have benefited from rapid industrialization, infrastructure development and economic reforms, contributing to the region's rising consumption levels.

China is the prime example, with GDP per capita increasing ten-fold since the year 2000, and more than doubling this decade alone, from USD 4,500 in 2010 to USD 9,610 in 2018. No other country in Asia, or in the world, has seen such magnitude of growth. Lao People's Democratic Republic, Myanmar, Mongolia and Viet Nam have also experienced strong growth in per capita GDP, though from lower base numbers.

Rapid economic growth in a region with over half the world's population has led to booming international travel in Asia and the Pacific. Rising air connectivity, market openness, travel facilitation and the falling cost of travel have also contributed to this surge in tourism, both within Asia (intraregional) and to/from other regions (interregional). Asia and the Pacific already accounts for 30% of the world's international tourism receipts and 25% of international tourist arrivals.

Table 1.2 Largest economies in Asia and the Pacific

Rank	Country	Population		Gross domestic product (GDP)			Real GDP (% change over previous year)		
		(million)	Share (% of Asia)	(USD billion)	Share (% of Asia)	per capita (USD)			
		2018	2018	2018	2018	2018	2017	2018	2019 (f)
World		**7.5 billion**		**84.7 trillion**		**11,290**	**3.8**	**3.6**	**3.3**
Asia and the Pacific		**4.2 billion**	**100**	**29.5 trillion**	**100**	**7,030**	**5.7**	**5.2**	**..**
1	China	1,395	33.3	13,407	45.4	9,610	6.8	6.6	6.3
2	Japan	126	3.0	4,972	16.8	39,310	1.9	0.8	1.0
3	India	1,334	31.8	2,717	9.2	2,040	7.2	7.1	7.3
4	Republic of Korea	52	1.2	1,619	5.5	31,350	3.1	2.7	2.6
5	Australia	25	0.6	1,418	4.8	56,350	2.4	2.8	2.1
6	Indonesia	264	6.3	1,022	3.5	3,870	5.1	5.2	5.2
7	Taiwan Pr. of China	24	0.6	589	2.0	24,970	3.1	2.6	2.5
8	Thailand	68	1.6	487	1.7	7,190	4.0	4.1	3.5
9	Iran	82	2.0	452	1.5	5,490	3.7	-3.9	-6.0
10	Hong Kong (China)	7	0.2	363	1.2	48,510	3.8	3.0	2.7
11	Singapore	6	0.1	361	1.2	64,040	3.9	3.2	2.3
12	Malaysia	32	0.8	354	1.2	10,940	5.9	4.7	4.7
13	Philippines	107	2.5	331	1.1	3,100	6.7	6.2	6.5
14	Pakistan	201	4.8	313	1.1	1,560	5.4	5.2	2.9
15	Bangladesh	165	3.9	288	1.0	1,740	7.6	7.7	7.3
16	Viet Nam	95	2.3	241	0.8	2,550	6.8	7.1	6.5
17	New Zealand	5	0.1	203	0.7	41,270	2.6	3.0	2.5
18	Sri Lanka	22	0.5	88	0.3	4,070	3.3	3.0	3.5
19	Myanmar	53	1.3	69	0.2	1,300	6.8	2.1	6.4
20	Macao (China)	1	0.0	55	0.2	82,390	9.7	4.7	4.3
21	Nepal	30	0.7	29	0.1	970	7.9	6.3	6.5
22	Cambodia	16	0.4	25	0.1	1,510	7.0	7.3	6.8
23	Papua New Guinea	8	0.2	21	0.1	2,530	2.4	0.0	3.8
24	Afghanistan	36	0.9	20	0.1	540	2.7	2.3	3.0
25	Lao PDR	7	0.2	18	0.1	2,720	6.8	6.5	6.7

Source: Compiled by UNWTO from the International Monetary Fund (IMF), *World Economic Outlook*, April 2019. (f) IMF forecast

1.2 Inbound tourism

1.2.1 Global trends in 2018

International tourist arrivals (overnight visitors) increased 5% in 2018 to reach 1.4 billion globally, two years ahead of UNWTO's long-term forecast issued in 2010. Sustained growth of 4% or more for the past nine years, peaking at +7% in 2017, explains this early attainment.

Overall results in 2018 were driven by a favourable economic environment, strong outbound demand from major source markets and increasing air connectivity in many parts of the world.

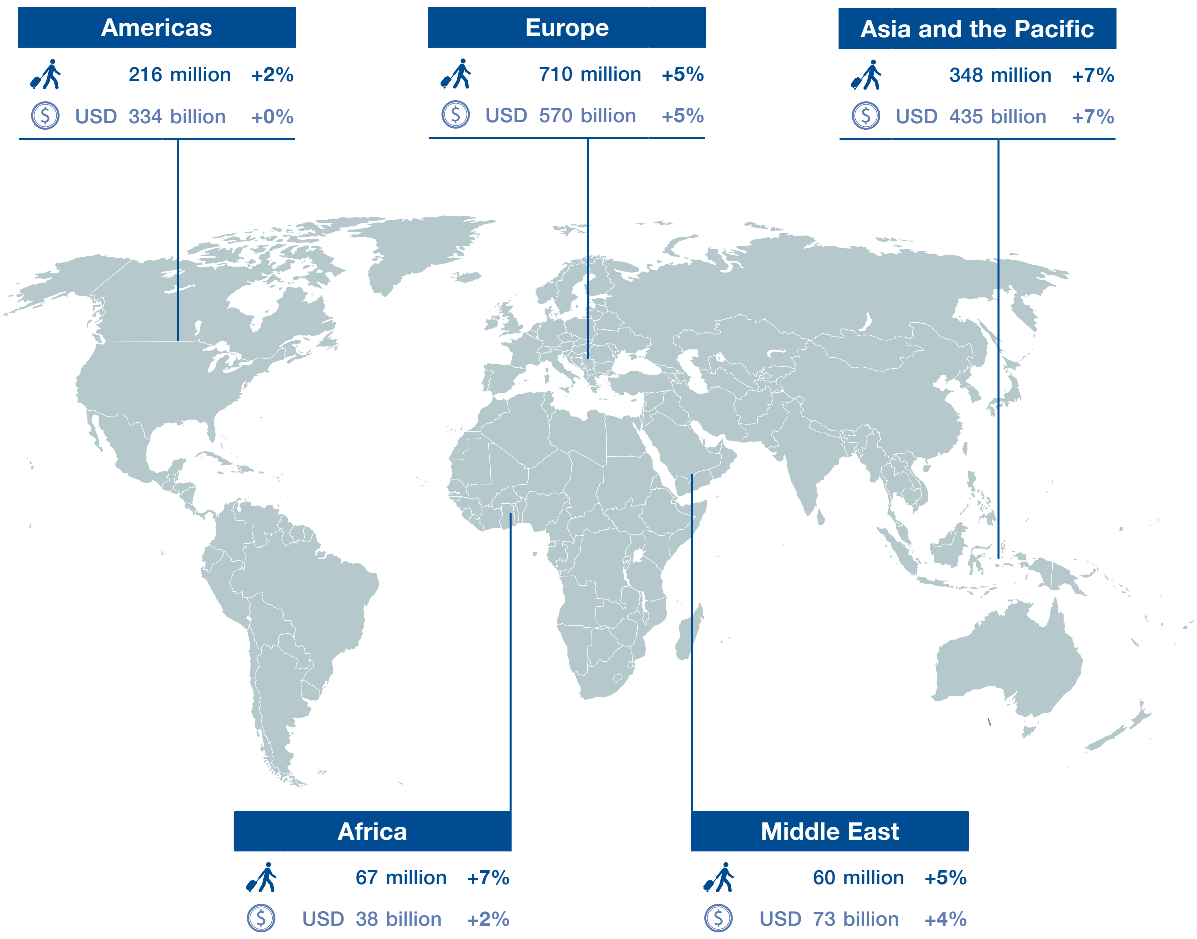
Asia and the Pacific enjoyed the highest growth in both arrivals and receipts in 2018 (+7%). Africa also recorded 7% more arrivals, while Europe and the Middle East both saw a 5% increase. The Americas recorded 2% growth in international tourist arrivals.

1.2.2 International tourist arrivals in Asia and the Pacific

Asia has seen the strongest growth in international arrivals since 2010

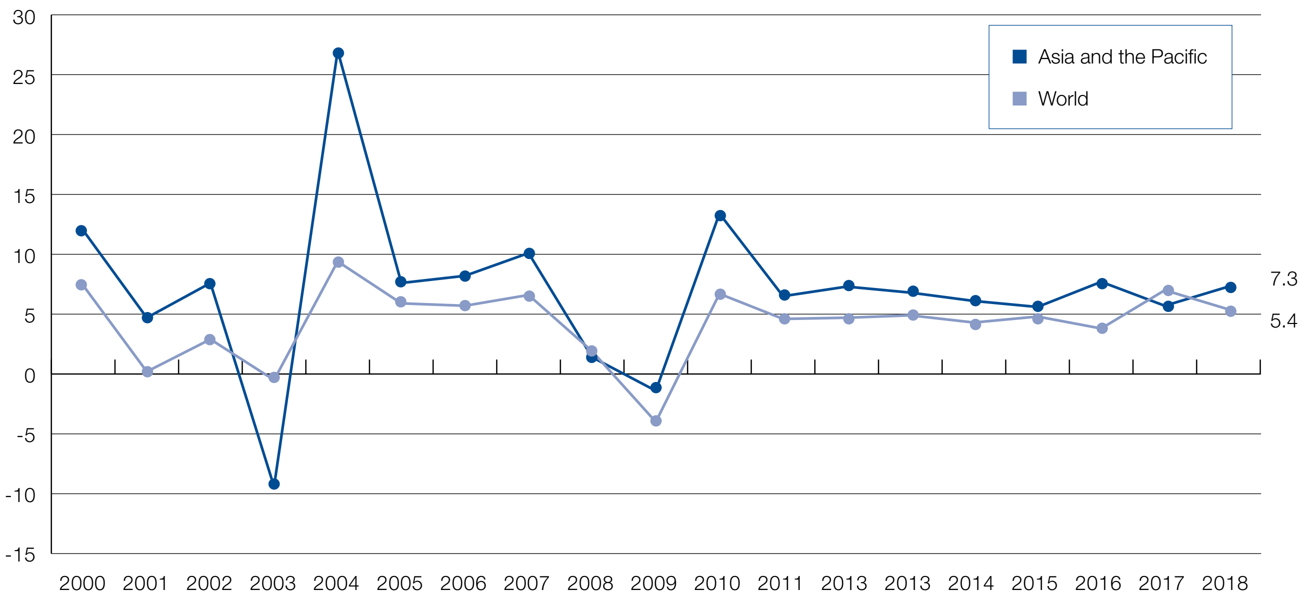
Asia and the Pacific is the second most visited region in the world after Europe and has seen the fastest growth in recent years. Between 2010 and 2018 arrivals to Asia and the Pacific destinations increased an average of 7% per year, compared to the world average of 5%, also outperforming all world regions.

Figure 1.3 International tourist arrivals and tourism receipts by world regions, 2018



Source: World Tourism Organization (2019), International Tourism Highlights, 2019 Edition, UNWTO, Madrid. Data as collected by UNWTO (August 2019).

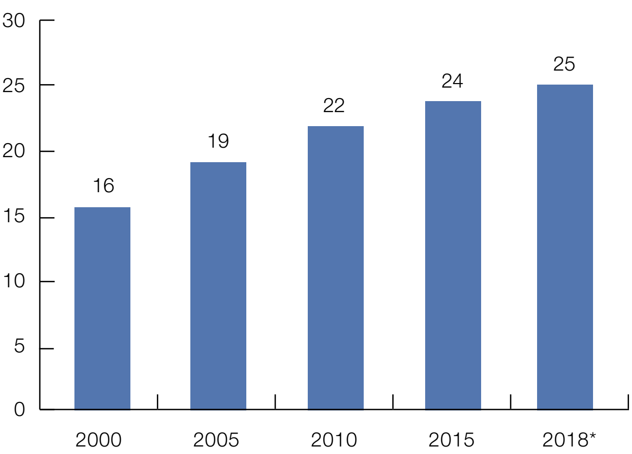
Figure 1.4 Growth in international tourist arrivals in Asia and the Pacific and the world (%)



Source: World Tourism Organization (UNWTO).

In 2018 Asia recorded 7% growth, to reach 348 million international tourist arrivals, one-fourth of the world's total. This share has expanded continuously from 16% in 2000 to 25% in 2018.

Figure 1.5 Asia and the Pacific's share of global international tourist arrivals (%)



Source: World Tourism Organization (UNWTO). * Provisional data.

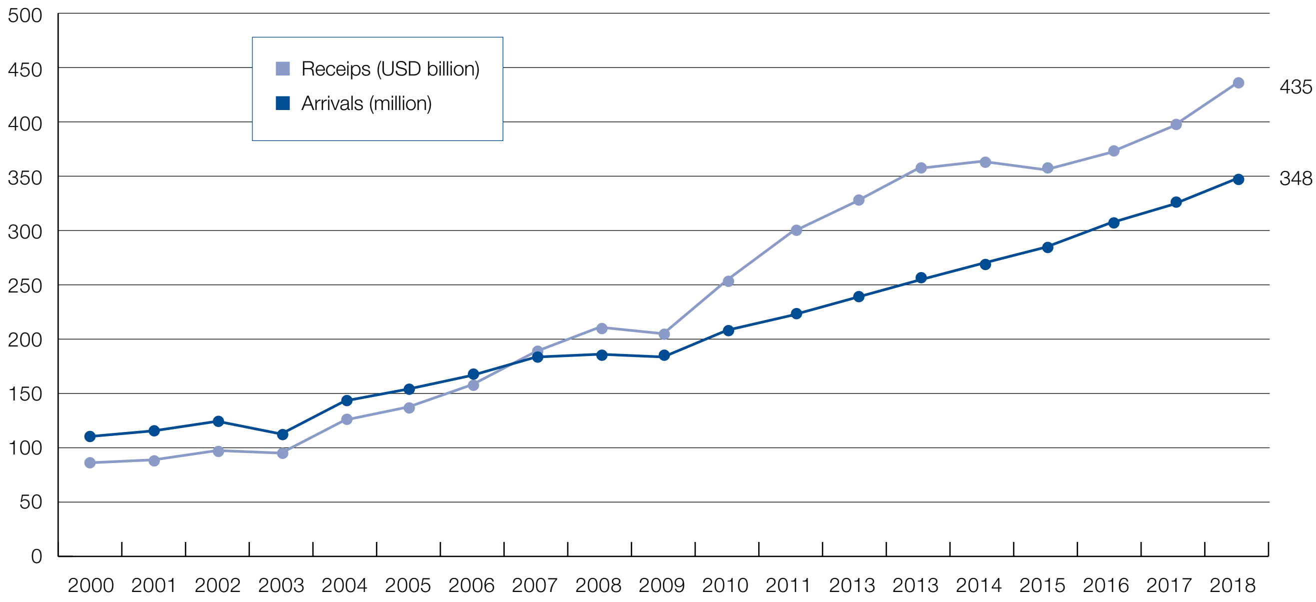
By subregions, South Asia led results in 2018 with a strong 19% increase in arrivals, due to exceptional growth in Iran (+50%) and double-digit figures in India, Nepal and Sri Lanka. Arrivals in South-East Asia grew by 7% with Viet Nam, Lao People's Democratic Republic and Cambodia boasting the highest growth. Thailand, the subregion's largest destination, posted an 8% increase.

In North-East Asia results were led by the Republic of Korea (+15%) which enjoyed a solid rebound after weaker results in 2017. Japan saw its seventh consecutive year of strong results, mostly in double-digits. China, the largest destination in Asia, experienced its fourth straight year of sustained growth.

Between 2010 and 2018 South Asia and South-East Asia were the fastest-growing subregions in the world, with 10% and 8% average annual growth respectively.

Since 1990, Asia has seen steady and sometimes spectacular growth in international tourist arrivals year after year, with the exception of a downturn in 2003 following the SARS outbreak, and a smaller decrease in 2009 due to the global economic crisis. In 2002 Asia became the world's second most visited region after overtaking the Americas. International tourism receipts have grown in line with arrivals, and since 2009 at an even faster rate. Most countries have benefited from solid tourism development in recent years, supported by increased air capacity, infrastructure development and promotional efforts.

Figure 1.6 International tourist arrivals and tourism receipts in Asia and the Pacific



Source: World Tourism Organization (UNWTO). Data as collected by UNWTO (August 2019).

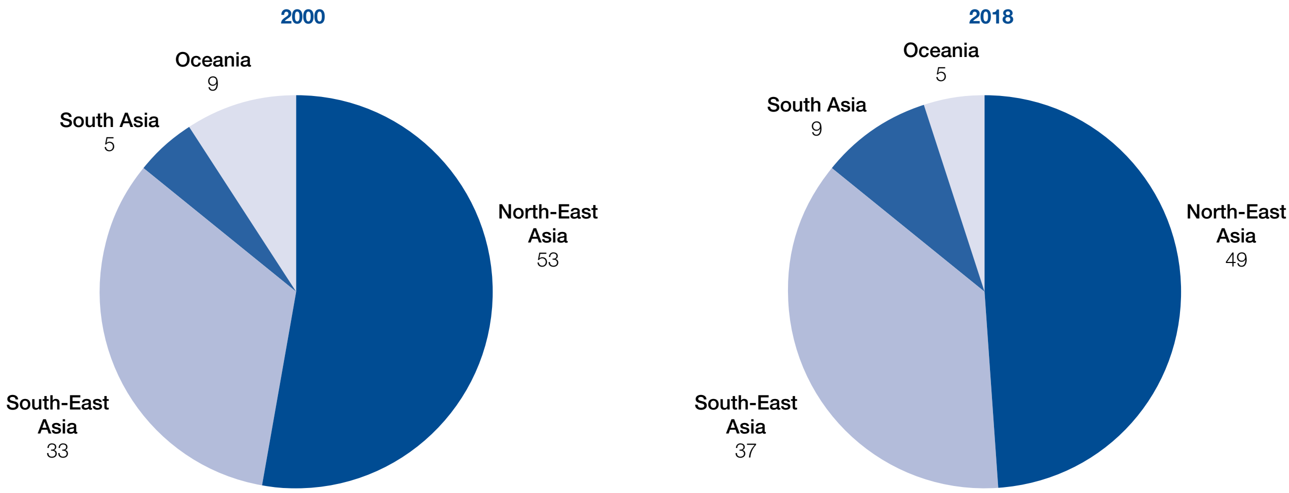
North-East Asia represents half of all arrivals in Asia and the Pacific

In 2018, almost half of all international tourist arrivals in Asia were recorded in the subregion of North-East Asia (49%), that is 169 million arrivals. About 37% were recorded in South-East Asia, 9% in South Asia and 5% in Oceania. North-East Asia's share of arrivals has declined slightly between 2000 and 2018, while it has increased in South Asia and South-East Asia. Oceania saw its share of arrivals decline this period by almost half.

China, its two Special Administrative Regions Hong Kong and Macao, together with Japan and the Republic of Korea account for virtually all arrivals in North-East Asia. Thailand, Malaysia, Singapore, Indonesia, Viet Nam, the Philippines and Cambodia together represent the majority of arrivals in South-East Asia. India and Iran account for 75% of arrivals in South Asia, while Australia and New Zealand account for 76% of those in Oceania.

Other destinations usually report lower arrivals numbers in absolute terms, but are often high relative to their

Figure 1.7 International tourist arrivals in Asia and the Pacific by subregions, 2000 and 2018 (% share)



Source: World Tourism Organization (UNWTO).

population, particularly in many Pacific island destinations. Oceania has the highest arrivals per capita of all Asian subregions (41 international arrivals per 100 inhabitants), five times that of the overall region (8 per 100).

The world ranking by international arrivals features two Asian destinations in the top ten: China (4th) with 63 million international arrivals in 2018 and Thailand (9th) with 38 million. Japan, Hong Kong (China) and Malaysia rank 11th, 14th and 15th respectively. See arrivals data for all Asia and the Pacific destinations in table 1.13.

1.2.3 International tourism receipts in Asia and the Pacific

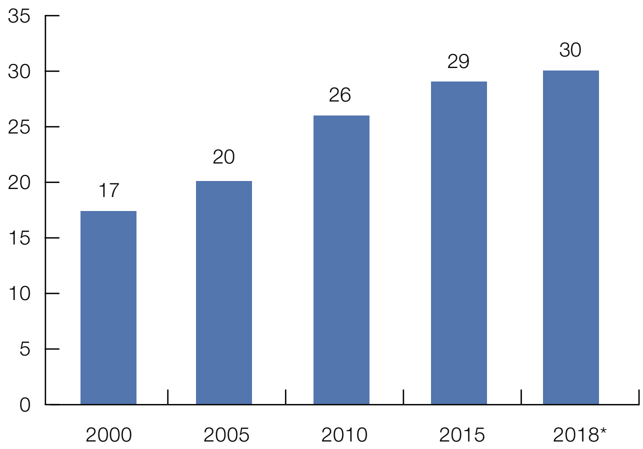
Asia and the Pacific accounts for 30% of the world's international tourism receipts

Asia and the Pacific's success as a destination region can also be seen in its international tourism earnings. The region earned USD 435 billion in tourism receipts in 2018, or 30% of the world total. This share has almost doubled from 17% in the year 2000.

In 2018, international tourism receipts in Asia increased by 7% in real terms (local currencies at constant prices), with solid growth across all subregions, particularly South Asia (+10%) and North-East Asia (+9%). In South Asia, several destinations reported double-digit growth, led by India the subregion's largest destination, as well as Sri Lanka and Maldives. Strong outbound demand from India itself fuelled much growth in the subregion and other parts Asia.

North-East Asia represents 43% of the region's international tourism receipts (measured in US dollars) which like its proportion of arrivals (49%) attests to the subregion's predominance in Asia. South-East Asia accounts for 33% of the region's tourism earnings, while Oceania represents 14% and South Asia 10%.

Figure 1.8 Asia and the Pacific's share of global international tourism receipts (%)



Source: World Tourism Organization (UNWTO). * Provisional data.

Table 1.3 International tourist arrivals by (sub)region

	International tourist arrivals (million)					Share (%)	Change (%)		Av. annual growth (%)
	2000	2010	2016	2017	2018*	2018*	17/16	18*/17	10–18*
World	**680**	**952**	**1,241**	**1,329**	**1,401**	**100**	**7.0**	**5.4**	**5.0**
Advanced economies[1]	430	515	687	730	762	54.4	6.3	4.3	5.0
Emerging economies[1]	251	437	554	598	639	45.6	7.9	6.8	4.9
By UNWTO regions:									
Asia and the Pacific	**110.4**	**208.2**	**306.6**	**324.0**	**347.7**	**24.8**	**5.7**	**7.3**	**6.6**
North-East Asia	58.4	111.5	154.3	159.5	169.2	12.1	3.4	6.1	5.3
South-East Asia	36.3	70.5	110.8	120.5	128.7	9.2	8.8	6.8	7.8
Oceania	9.6	11.5	15.6	16.6	17.0	1.2	6.1	2.8	5.1
South Asia	6.1	14.7	25.9	27.5	32.8	2.3	6.2	19.4	10.5
Europe	**392.9**	**486.4**	**620.0**	**673.3**	**710.0**	**50.7**	**8.6**	**5.5**	**4.8**
Americas	**128.2**	**150.4**	**201.3**	**210.8**	**215.6**	**15.4**	**4.7**	**2.3**	**4.6**
Africa	**26.2**	**50.4**	**57.8**	**62.7**	**67.1**	**4.8**	**8.5**	**7.0**	**3.6**
Middle East	**22.8**	**56.1**	**55.5**	**57.7**	**60.5**	**4.3**	**4.1**	**4.7**	**0.9**

1 Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF *World Economic Outlook*, April 2017, page 175, at: www.imf.org/external/ns/cs.aspx?id=29.

Data as collected by UNWTO (August 2019).

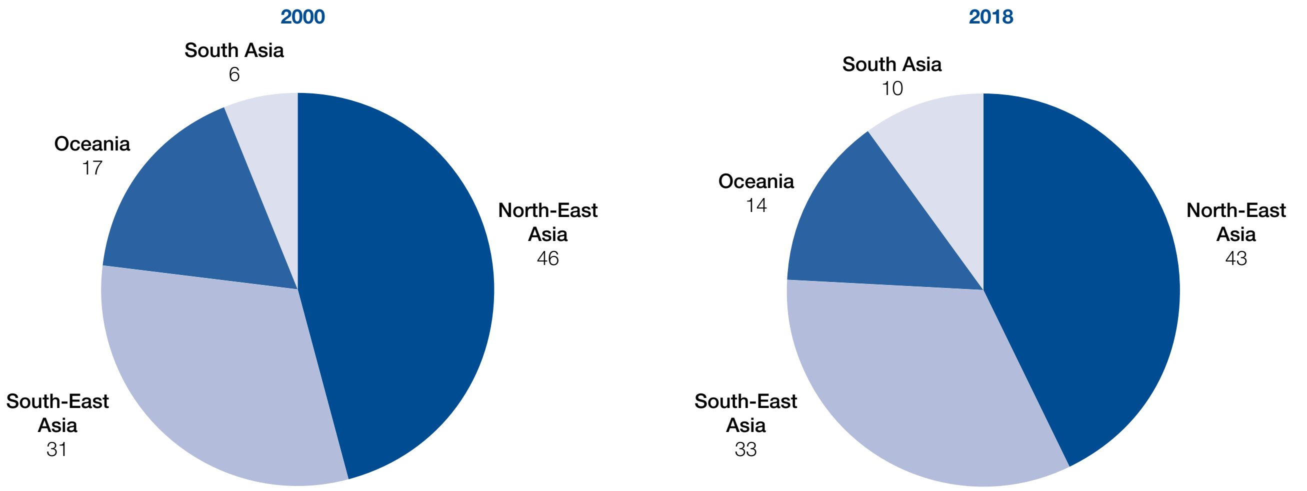
Source: World Tourism Organization (UNWTO).

Between 2000 and 2018, South-East Asia and South Asia have seen an increase in their shares of arrivals, while North-East Asia and Oceania have seen a small decline.

In North-East Asia all destinations reported double-digit growth in earnings in 2018, led by China and Japan which benefitted from strong intraregional demand including from each other. These two destinations and Macao (China) all surpassed the USD 40 billion mark in tourism earnings last year.

International tourism receipts in Oceania grew 7% in real terms, with results driven by the two largest destinations, Australia and New Zealand. In South-East Asia, Cambodia and Viet Nam led growth in receipts with most destinations enjoying solid performance, mostly in line with the trend in arrivals. See receipts data for all Asia and the Pacific destinations in table 1.14.

Figure 1.9 International tourism receipts in Asia and the Pacific by subregions, 2000 and 2018 (% share)



Source: World Tourism Organization (UNWTO).

Table 1.4 International tourism receipts by (sub)region

	International tourism receipts (USD billion)					Change (local currencies, constant prices, %)		Share (%)	Receipts per arrival (USD)
	2000	2010	2016	2017	2018*	17/16	18*/17	2018*	2018*
World	**497**	**975**	**1,247**	**1,346**	**1,451**	**5.2**	**4.4**	**100**	**1,040**
Advanced economies[1]	360.7	638	816	869	937	4.0	3.7	64.6	1,230
Emerging economies[1]	135.9	337	431	477	514	7.6	5.6	35.4	800
By UNWTO regions:									
Asia and the Pacific	**86.2**	**254.4**	**371.5**	**396.0**	**435.5**	**4.3**	**7.4**	**30.0**	**1,250**
North-East Asia	39.4	123.0	169.5	168.1	188.4	-1.5	8.9	13.0	1,110
South-East Asia	26.8	68.5	117.0	130.6	142.3	9.1	4.7	9.8	1,110
Oceania	15.1	42.8	51.6	57.4	61.1	6.1	6.9	4.2	3,580
South Asia	4.8	20.1	33.3	39.9	43.6	13.9	10.4	3.0	1,330
Europe	**234.7**	**422.8**	**469.7**	**519.5**	**570.1**	**7.5**	**4.9**	**39.3**	**800**
Americas	**148.8**	**215.5**	**314.8**	**325.8**	**333.6**	**0.9**	**0.3**	**23.0**	**1,550**
Africa	**10.3**	**30.4**	**32.2**	**36.4**	**38.4**	**7.7**	**1.6**	**2.6**	**570**
Middle East	**16.7**	**52.2**	**58.8**	**68.4**	**73.0**	**14.6**	**4.2**	**5.0**	**1,210**

1 Classification based on the International Monetary Fund (IMF), see the Statistical Annex of the IMF *World Economic Outlook*, April 2017, page 175, at: www.imf.org/external/ns/cs.aspx?id=29.

* Provisional data.
Data as collected by UNWTO (August 2019).

Source: World Tourism Organization (UNWTO).

Revenues from international tourism represent 6% of Asia's total exports

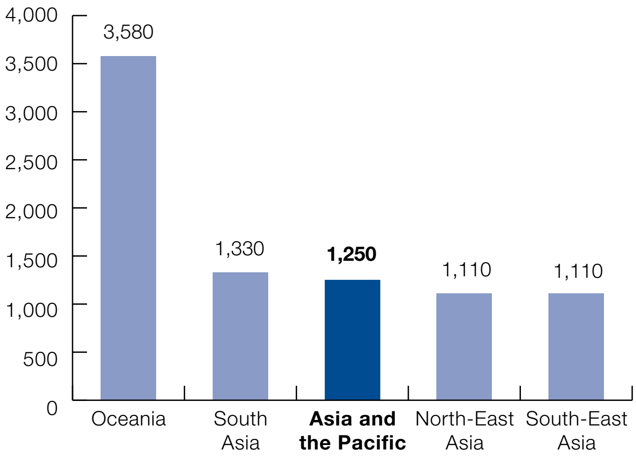
In addition to the USD 435 billion earned in destinations (the travel item in the balance of payments) international tourism in Asia generated USD 45 billion in earnings from international passenger transport, putting total export revenues from international tourism in Asia at USD 480 billion. This represents 32% of the region's services exports and 6% of its overall exports of goods and services.

Asian receipts per arrival exceed the world average

Asian destinations earn an average USD 1,250 from every tourist (arrival), above the world average of USD 1,040. By subregion, Oceania has the highest relative earnings, about USD 3,580 per arrival, more than double that of South Asia (USD 1,330), and three times that of North-East and South-East Asia (USD 1,110 in both cases).

The relatively high earnings in Oceania are due to the subregion's larger proportion of long-haul visitors, who tend to stay longer at their destination and spend more as a result. Higher income per capita and thus higher prices in those destinations, namely in Australia, are also an important factor.

Figure 1.10 International tourism receipts in Asia and the Pacific per arrival, 2018 (USD)



Source: World Tourism Organization (UNWTO).

1.2.4 Top destinations in Asia and the Pacific

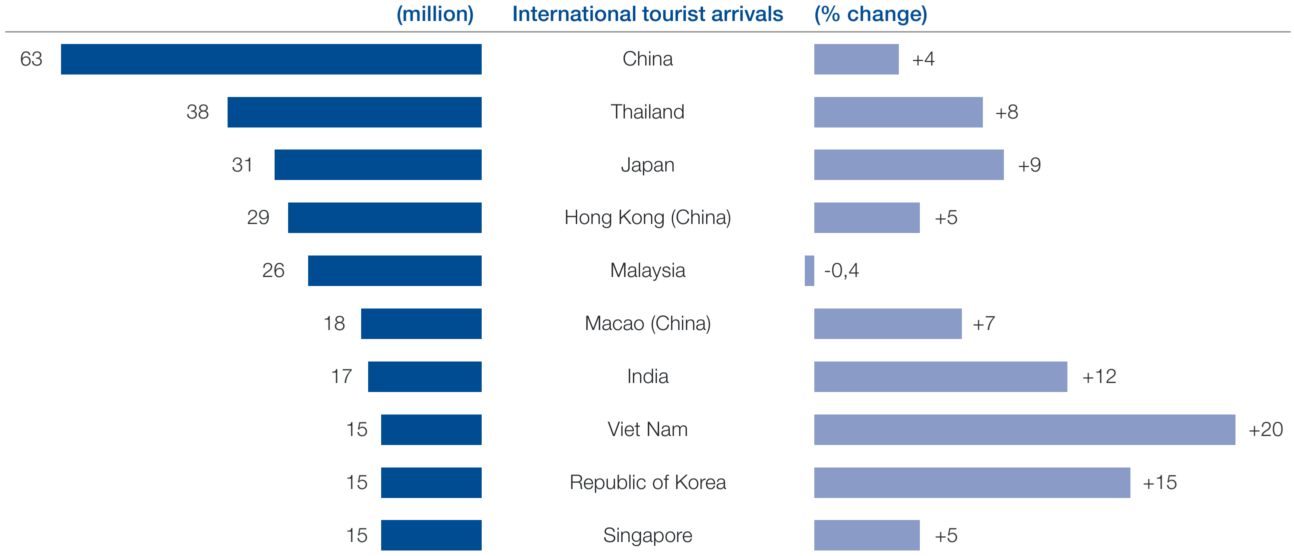
China is the top destination in Asia and the Pacific with 63 million international arrivals in 2018, followed by Thailand with 38 million and Japan with 31 million. China and Thailand are also featured in the world's top ten ranking, in fourth and ninth place respectively, while Japan is in eleventh place. Other top Asian destinations in terms of international arrivals are Hong Kong (China), Malaysia, Macao (China) and India.

Regarding international tourism receipts, Thailand is the top earner in Asia with USD 63 billion recorded in 2018, Australia is second with USD 45 billion and Japan third with USD 41 billion. Following closely are China (USD 40 billion), Macao (China) with USD 40 billion and Hong Kong (China) with USD 37 billion.[4] Four Asian destinations appear on the world's top ten ranking of international tourism earners: Thailand (fourth), Australia (seventh), Japan (ninth) and China (tenth).

Among the top 15 destinations in Asia ranked by arrivals and receipts, it is interesting that fourteen appear on both rankings (though in different order), despite showing important differences in terms of the type of tourists they attract, their average length of stay and their spending per trip and per night.

It is worth noting that changes in the receipts ranking not only reflect shifts in the relative performance of destinations, but in some cases also exchange rate fluctuations between local currencies and the US dollar. As receipts are quoted in US dollars, the appreciation of a local currency (against the US dollar) can result in higher earnings in dollar terms from one year to another, while its depreciation can translate into lower earnings.

Figure 1.11 Top 10 destinations in Asia and the Pacific, 2018



Source: World Tourism Organization (UNWTO).

Data as collected by UNWTO (August 2019).

Figure 1.12 Top 10 tourism earners in Asia and the Pacific, 2018

Source: World Tourism Organization (UNWTO).

Note: Receipts correspond to the 'travel' credit item in the balance of payments of countries.

Table 1.5 Top tourism destinations in Asia and the Pacific – International tourist arrivals

Rank in:		Country	Series	Million			Change (%)	
Region	World			2016	2017	2018*	17/16	18*/17
1	4	China	TF	59	61	63	2.5	3.6
2	9	Thailand	TF	33	35	38	9.1	7.9
3	11	Japan	VF	24	29	31	19.4	8.7
4	14	Hong Kong (China)	TF	27	28	29	5.0	4.9
5	15	Malaysia	TF	27	26	26	-3.0	-0.4
6	21	Macao (China)	TF	16	17	18	9.9	7.2
7	22	India	TF	15	16	17	6.7	12.1
8	26	Viet Nam	VF	10	13	15	29.1	19.9
9	27	Republic of Korea	VF	17	13	15	-22.7	15.1
10	29	Singapore	TF	13	14	15	7.7	5.5
11	32	Indonesia	VF/TF	11	13	13	16.9	3.5
12	37	Taiwan Pr. of China	VF	11	11	11	0.5	3.0
13	41	Australia	VF	8	9	9	6.6	4.9
14	45	Iran	VF	5	5	7.3	-1.5	49.9
15	46	Philippines	TF	6	7	7.1	11.0	7.7

Source: World Tourism Organization (UNWTO).

Data as collected by World Tourism Organization (August 2019).

Table 1.6 Top tourism destinations in Asia and the Pacific – International tourism receipts[1]

Rank in:		Country	USD billion			Change (%, local currencies)		Per arrival (USD)
Region	World		2016	2017	2018*	17/16	18*/17	2018
1	4	Thailand	49	57	63	12.0	9.5	1,645
2	7	Australia	37	42	45	9.3	10.7	4,870
3	9	Japan	31	34	42	14.4	21.7	1,320
4	10	China	44	39	40	-25.4	21.2	640
5	11	Macao (China)	30	36	40	17.6	13.6	2,175
6	12	Hong Kong (China)	33	33	37	1.9	11.1	1,255
7	13	India	22	27	29	15.4	9.6	1,640
8	19	Singapore	19	20	21	4.1	1.6	1,400
9	21	Malaysia	18	18	20	5.1	0.3	740
10	25	Republic of Korea	17	13	15	-22.9	14.6	1,000
11	27	Indonesia	11	13	14	17.3	7.4	1,055
12	29	Taiwan Pr. of China	13	12	14	-7.9	11.3	1,240
13	35	New Zealand	10	11	11	5.7	6.7	2,985
14	36	Viet Nam	9	9	10	4.6	13.4	650
15	42	Philippines	5	7	7	35.9	6.8	1,045

1 International receipts are based on the 'travel' credit item of the balance of payments of countries.

Data as collected by World Tourism Organization (August 2019).

Source: World Tourism Organization (UNWTO).

Key to symbols and abbreviations

Series of International tourist arrivals and departures:
TF = International tourist arrivals at frontiers (overnight visitors, i.e. excluding same-day visitors)
VF = International visitors arrivals at frontiers (tourists and same-day visitors)

USD = United States dollar

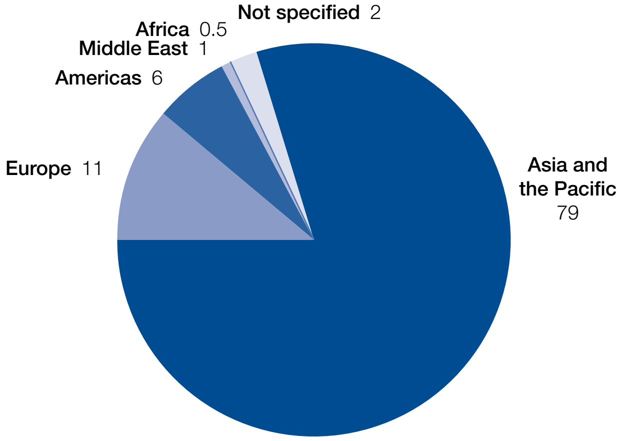
* = Provisional data
.. = Figure or data not (yet) available
. = Decimal separator
, = Thousands separator

1.2.5 Inbound tourism by region of origin

Almost 80% of arrivals in Asia and the Pacific originate in the region itself.

As in all world regions, intraregional tourism predominates in Asia and the Pacific, with 79% of the region's international tourist arrivals originating in Asia itself (intraregional). About 18% originated in other world regions (interregional), mostly in Europe (11%) and the Americas (6%), according to available information.[5]

Figure 1.13 Source regions of international tourist arrivals in Asia Pacific, 2018 (% share)



Source: World Tourism Organization (UNWTO).

The proportion of intraregional tourism is highest in North-East Asia, where 88% of arrivals originate in Asian source markets. The share is 81% in South-East Asia and 72% in Oceania. In the latter much intraregional tourism is actually long-haul, e.g., China to Australia. The proportion is lowest in South Asia, where 33% of international arrivals originate in Asia. Tourism from other regions accounts for 44% of South Asia's arrivals, mostly from Europe (26%) and the Americas (9%), though data for about one-fifth of arrivals in the subregion is unavailable.

Between 2010 and 2018, intraregional tourism in Asia grew by an average 7% per year, somewhat faster than interregional flows (6% per year), driven by the region's robust economic activity and increasing connectivity, much of which through low-cost carrier (LCC) services.

Low-cost airlines in Asia Pacific accounted for 35% of all air passengers carried in 2018 according to the International Civil Aviation Organization (ICAO). This is 4 percentage points higher than in 2017. It is also above the world average of 31%, and below the European average of 36%.[6]

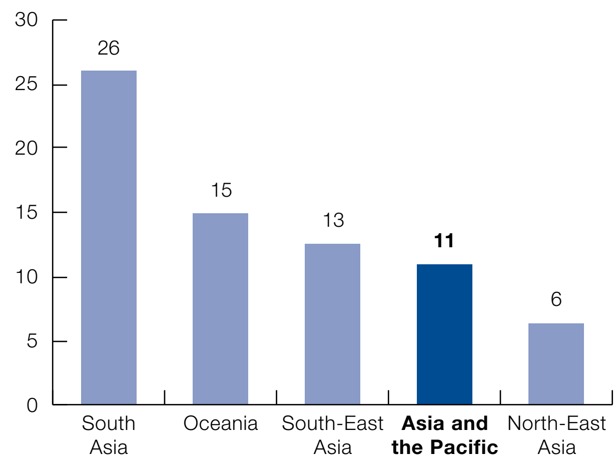
Interregional flows to Asia increased most from the Middle East this eight-year period (9% per year), followed by the Americas (6% per year), Africa and Europe (both 5% per year).

Europe remains the top source market of long-haul travel to Asia

Europe is the largest source of interregional tourism for Asia and the Pacific, accounting for 11% of all arrivals and 57% of arrivals from outside the region. This is explained by the surging popularity of destinations in Asia and the Pacific among European travellers, as well as growing trade and investment between both regions and Europe's historical and cultural ties with some parts of Asia and the Pacific.

South Asia has the highest proportion of European arrivals (26%), followed by Oceania (15%), South-East Asia (13%) and North-East Asia (6%). In absolute terms however, European arrivals are highest in South-East Asia (16 million) and North-East Asia (11 million).

Figure 1.14 European arrivals in Asia and the Pacific by subregions, 2018 (% share)



Source: World Tourism Organization (UNWTO).

Table 1.7 Inbound tourism in Asia and the Pacific by region of origin[a]

Arrivals in:	International tourist arrivals (× 1,000)					Share region of origin (%)		Change (%)		Change Av. annual (%)
	2000	2010	2015	2017	2018*	2010	2018*	17*/16	18*/17	10–18*
Asia and the Pacific	**110,377**	**208,174**	**284,636**	**324,041**	**347,731**	**100**	**100**	**5.7**	**7.3**	**6.6**
From:										
Asia and the Pacific	84,402	162,108	226,085	258,148	275,678	77.9	79.3	6.0	6.8	6.9
Other regions	24,159	41,468	51,325	58,347	64,081	19.9	18.4	4.9	9.8	5.6
Africa	649	1,174	1,488	1,619	1,777	0.6	0.5	5.2	9.8	5.3
Americas	8,329	12,602	15,324	18,103	19,756	6.1	5.7	6.8	9.1	5.8
Europe	14,445	25,460	30,098	34,774	38,224	12.2	11.0	5.7	9.9	5.2
Middle East	736	2,233	4,416	3,851	4,324	1.1	1.2	-8.6	12.3	8.6
Origin not specified	1,816	4,598	7,226	7,546	7,972	2.2	2.3	..	..	..
North-East Asia	**58,366**	**111,508**	**142,075**	**159,515**	**169,190**	**100**	**100**	**3.4**	**6.1**	**5.3**
From:										
Asia and the Pacific	49,233	94,867	124,617	139,679	148,097	85.1	87.5	3.3	6.0	5.7
Other regions	8,832	16,294	17,179	19,564	20,777	14.6	12.3	4.3	6.2	3.1
Africa	154	571	634	652	681	0.5	0.4	1.1	4.5	2.2
Americas	4,077	6,426	7,195	8,281	8,832	5.8	5.2	4.5	6.7	4.1
Europe	4,517	8,961	8,970	10,274	10,886	8.0	6.4	4.6	6.0	2.5
Middle East	83	337	380	357	377	0.3	0.2	-3.4	5.5	1.4
Origin not specified	301	346	279	272	317	0.3	0.2	..	..	..
South-East Asia	**36,284**	**70,473**	**104,243**	**120,466**	**128,680**	**100**	**100**	**8.8**	**6.8**	**7.8**
From:										
Asia and the Pacific	26,740	55,377	84,353	97,662	104,415	78.6	81.1	9.4	6.9	8.3
Other regions	8,363	14,251	19,095	22,478	24,031	20.2	18.7	5.9	6.9	6.7
Africa	280	266	395	486	522	0.4	0.4	10.4	7.3	8.8
Americas	2,407	3,416	4,594	5,550	5,946	4.8	4.6	8.7	7.1	7.2
Europe	5,396	9,779	12,782	15,152	16,192	13.9	12.6	6.6	6.9	6.5
Middle East	279	790	1,324	1,290	1,372	1.1	1.1	-11.6	6.4	7.1
Origin not specified	1,181	844	795	326	234	1.2	0.2	..	..	..
Oceania	**9,635**	**11,468**	**14,284**	**16,580**	**17,044**	**100**	**100**	**6.1**	**2.8**	**5.1**
From:										
Asia and the Pacific	6,381	7,908	10,338	11,997	12,250	69.0	71.9	5.9	2.1	5.6
Other regions	3,162	3,452	3,919	4,542	4,750	30.1	27.9	6.5	4.6	4.1
Africa	99	110	106	114	118	1.0	0.7	2.1	4.3	0.9
Americas	1,199	1,202	1,519	1,889	1,979	10.5	11.6	9.7	4.8	6.4
Europe	1,824	2,053	2,198	2,433	2,540	17.9	14.9	4.5	4.4	2.7
Middle East	40	86	96	106	111	0.8	0.7	5.1	4.7	3.3
Origin not specified	92	107	27	41	44	0.9	0.3	..	..	..
South Asia	**6,092**	**14,726**	**24,035**	**27,480**	**32,817**	**100**	**100**	**6.2**	**19.4**	**10.5**
From:										
Asia and the Pacific	2,047	3,955	6,777	8,811	10,916	26.9	33.3	16.5	23.9	13.5
Other regions	3,802	7,470	11,133	11,763	14,523	50.7	44.3	3.5	23.5	8.7
Africa	117	227	353	367	456	1.5	1.4	7.2	24.2	9.1
Americas	645	1,557	2,016	2,384	2,999	10.6	9.1	8.5	25.8	8.5
Europe	2,707	4,667	6,147	6,914	8,605	31.7	26.2	5.6	24.5	7.9
Middle East	333	1,019	2,617	2,097	2,464	6.9	7.5	-8.1	17.5	11.7
Origin not specified	242	3,301	6,126	6,907	7,378	22.4	22.5	..	..	..

Source: World Tourism Organization (UNWTO). * Provisional data.

a) Data as collected by UNWTO (August 2019), including estimates for countries with missing data.

1.2.6 Inbound tourism by mode of transport

Air travel accounts for 64% of all arrivals in Asia

Air travel remains the dominant mode of transport for international travel to destinations in Asia and the Pacific, accounting for 64% of all arrivals in 2018. The share of air travel has increased in recent years (up from 57% in 2010), largely due to the rise of low-cost carriers (LCC). Meanwhile, the proportion of land transport has declined from 36% in 2010 to 30% in 2018.

Land transport accounts for 30% of international arrivals in the region (virtually all of which by road) and 5% corresponds to transport over water. Some cruise lines have expanded their operations in Asia and the Pacific following the recent rise in demand, particularly from China. Travel by rail still represents a very minor share in Asia.

Much of the arrivals over land and water in Asia correspond to travel between mainland China and its Special Administrative Regions Hong Kong and Macao.

By subregions, air travel is highest in Oceania – for obvious geographical reasons – accounting for virtually all arrivals in the region (99%). It is lowest in North-East Asia (56% of arrivals), where there is a higher proportion of international travel by land (37%) and over water (7%). Air travel is also very significant in South Asia, where it accounts for 76% of arrivals.

Despite being the dominant form of transport, air travel is growing faster than other categories year after year, due to higher connectivity and lower travel costs. International arrivals by air in Asia grew 7% in 2017 and 8% in 2018.

Table 1.8 Arrivals in Asia and the Pacific by mode of transport[a]

Mode of transport	International tourist arrivals (million)						Share (%)		Change (%)		Av. annual (%)
	2000	2005	2010	2015	2017*	2018*	2010	2018*	17/16	18*/17	10–18*
Total	**110.4**	**154.1**	**208.2**	**284.6**	**324.0**	**347.7**	**100**	**100**	**5.7**	**7.3**	**6.6**
Air	65.1	84.2	118.9	175.4	207.2	223.2	57.1	64.2	7.2	7.7	8.2
Land	35.9	59.1	75.6	92.6	98.6	105.2	36.3	30.3	4.7	6.8	4.2
Road	35.3	58.2	75.0	91.7	97.8	104.4	36.0	30.0	4.6	6.8	4.2
Rail	0.7	0.9	0.6	0.9	0.8	0.9	0.3	0.3	11.3	7.3	4.8
Water	8.7	9.8	13.6	16.0	16.0	17.2	6.5	4.9	-9.5	7.3	3.0
Not specified	0.6	1.0	0.1	0.6	2.3	2.1	0.0	0.6	..	..	..

Source: World Tourism Organization (UNWTO).

a) Data as collected by UNWTO (August 2019), including estimates for countries with missing data.

Table 1.9 International tourist arrivals in Asia and the Pacific by subregion and mode of transport[a], 2018*

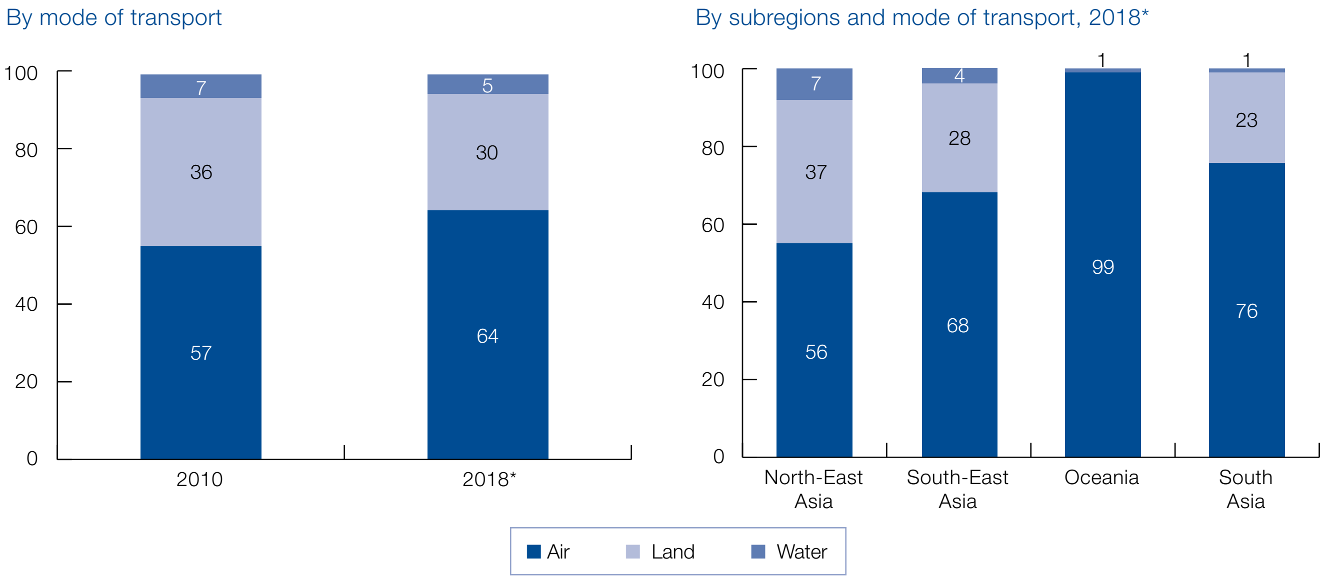
Region/subregion	Total	Air	Land			Water
			Total	of which		
				Road	Rail	
Total (million)	**347.73**	**223.2**	**105.2**	**104.4**	**0.9**	**17.2**
North-East Asia	169.2	94.5	62.2	61.8	0.5	12.2
South-East Asia	128.7	87.7	35.8	35.5	0.3	4.9
Oceania	17.0	16.8	0.0	0.0	0.0	0.2
South Asia	32.8	24.8	7.5	7.5	0.0	0.3
Total (%)	**100**	**64.2**	**30.3**	**30.0**	**0.3**	**4.9**
North-East Asia	100	55.9	36.8	36.5	0.3	7.2
South-East Asia	100	68.2	27.9	27.6	0.3	3.8
Oceania	100	98.6	0.0	0.0	0.0	1.1
South Asia	100	75.6	22.9	22.8	0.1	0.8

Source: World Tourism Organization (UNWTO). * Provisional data.

Note: "Not specified" category excluded.

a) Data as collected by UNWTO (August 2019), including estimates for countries with missing data.

Figure 1.15 International tourist arrivals in Asia and the Pacific (%)



Source: World Tourism Organization (UNWTO).

* Provisional data.

1.2.7 Inbound tourism by purpose of visit

58% of international tourists to Asia travel for leisure

Like in other parts of the world, travel for 'leisure, recreation and holidays' generates the highest proportion of arrivals in Asia and the Pacific (58%), well above other categories such as 'visiting friends and relatives' (VFR), trips for 'health', 'religious' and 'other' reasons (23%), or 'business and professional' travel (10%). (The purpose for the remaining 9% of trips is not specified).

Leisure and recreation has been the fastest-growing purpose of travel this decade, despite also being the largest, from 48% in 2010 to 58% in 2018.

International travel by nationals living abroad for VFR reflects the importance of migration for tourism. A large number of nationals from countries like India, Thailand, Philippines and Indonesia live and work abroad and often visit their home countries or receive visits from family and friends in their new countries of residence. There are also large communities of immigrants of Chinese origin throughout South-East Asia and further afield, for whom VFR and cultural travel to and from China has become much easier.

This information provides some useful insight about the purpose of travel in Asia and the Pacific, though figures should not be interpreted strictly, as not all countries categorise the purposes in the same way, if at all. Also, many travellers often make trips for multiple purposes.

Table 1.10 Arrivals in Asia and the Pacific by purpose of visit[a]

Purpose of visit	International tourist arrivals (million)						Share (%)		Change (%)		Av. annual (%)
	2000	2005	2010	2015	2017	2018*	2010	2018*	17/16	18*/17	10-18*
Total	**110.4**	**154.1**	**208.2**	**284.6**	**324.0**	**347.7**	**100**	**100**	**5.7**	**7.3**	**6.6**
Leisure. recreation and holidays	51.7	69.7	100.1	149.8	187.9	201.5	48.1	57.9	10.4	7.3	9.1
Business and professional	15.9	22.9	29.7	32.2	33.7	35.7	14.3	10.3	-0.7	5.9	2.3
VFR, health, religion, other[b]	21.4	32.8	48.5	65.4	77.7	80.8	23.3	23.2	14.8	4.0	6.6
Not specified	21.3	28.7	29.9	37.3	24.7	29.6	14.4	8.5	..	..	..

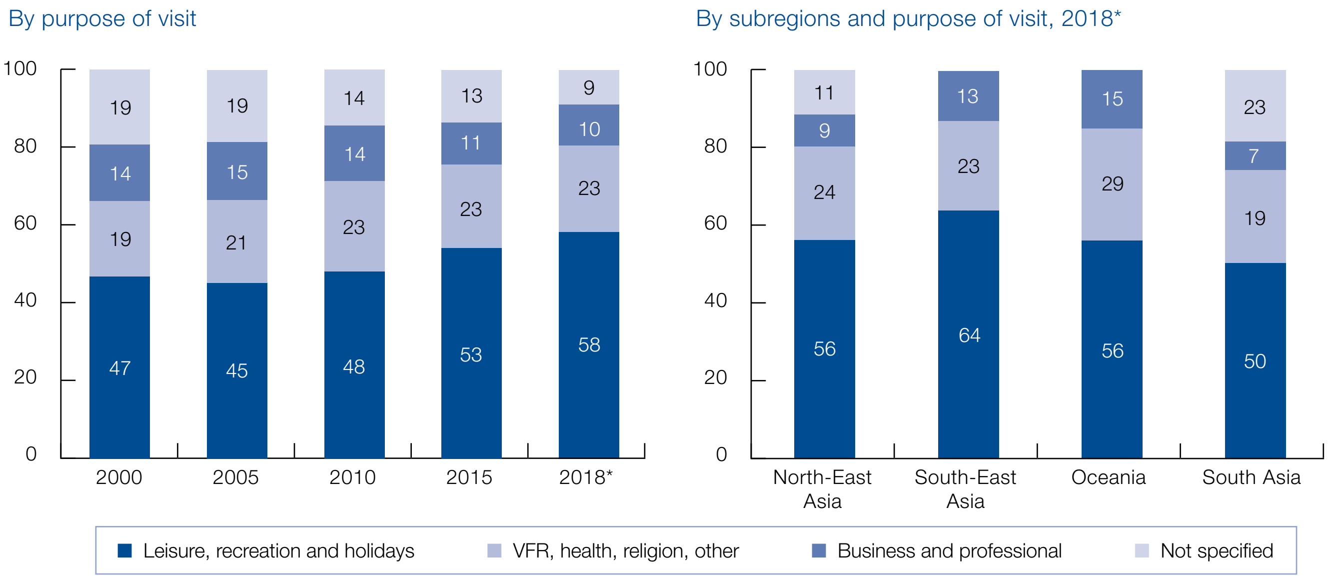
Source: World Tourism Organization (UNWTO).

* Provisional data.

a) Data as collected by UNWTO (August 2019), including estimates for countries with missing data.

b) VFR = Visiting friends and relatives.

Figure 1.16 International tourist arrivals in Asia Pacific by purpose of visit (%)



Source: World Tourism Organization (UNWTO).

* Provisional data.

1.3 Outbound tourism

1.3.1 Destination trends and preferences

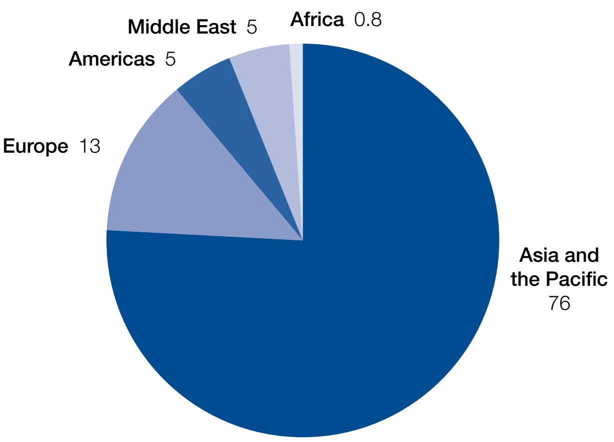
Nine consecutive years of strong growth in outbound travel

Outbound travel from Asia and the Pacific – measured in arrivals recorded in destinations worldwide – reached 359 million in 2018, a 6% increase from 2017. It was the ninth consecutive year of robust growth in outbound tourism, since the 2009 global economic crisis. Asian outbound tourism has grown an average of 7% per year between 2010 and 2018, or 75% on aggregate.

Intraregional travel (within the region) accounts for 76% of all Asian outbound travel and interregional travel (to other regions) for the remaining 24%.

North-East Asian destinations account for 41% of all intraregional arrivals (originating in Asia), much of which is generated by the subregion itself. A large part of these travel flows take place between mainland China and Hong Kong (China) and Macao (China). Travel flows to and from Japan, the Republic of Korea and Singapore are also significant. South-East Asian destinations account for 29% of all Asian outbound travel.

Figure 1.17 Destination regions of Asia and the Pacific outbound travel, 2018 (%)



Source: World Tourism Organization (UNWTO).

Interregional travel (to other regions) represents 24% of all arrivals generated in Asia, and saw a strong 7% increase last year, reflecting solid demand for long-haul travel, particularly to the Middle East.

Europe remains the largest interregional destination

Europe is the top long-haul destination for travellers from Asia and the Pacific, accounting for 55% of Asia's interregional travel (outside the region) and 13% of Asian travel overall (measured in arrivals in destinations). Asian travel to Europe grew 6% in 2018, a solid increase that consolidates the remarkable figures recorded in 2017. Southern and Mediterranean Europe saw the strongest increase in arrivals from Asia (+10%), though Western Europe still represents the largest share of Asian arrivals in the region (40%).

The Americas account for 22% of interregional travel from Asia and the Pacific and 5% of outbound travel overall. North America accounts for virtually all Asian arrivals in the region (92%). Asian travel to the Americas increased 4% in 2018.

The Middle East represents 19% of Asia's long-haul tourism and 4% of the region's total outbound flows, most of which originating in South Asia and South-East Asia. Asian travel to the Middle East increased 14% in 2018, the strongest of all regions. The development of economic and trade links between Asia – mostly China – and the Middle East is stimulating Asian travel to this region.

Travel to Africa is still rather limited, accounting for 4% of interregional trips and 1% of all Asian outbound travel.

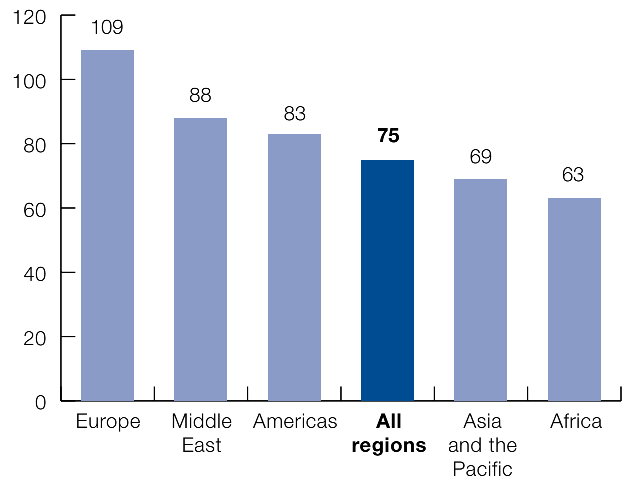
Asian travel grows faster to long-haul destinations

Between 2010 and 2018 Asian outbound travel increased by 75%. Interregional tourism (outside Asia) almost doubled this period (+97%), surpassing growth in intraregional travel (within Asia) which increased by 69%

Europe has been the fastest-growing interregional destination for Asians, with arrivals increasing by 109% this eight-year period, or an average 10% per year. The Middle East and the Americas recorded 88% and 83% more arrivals from Asia respectively (both +8% per year). Asian travel to other world regions is expected to continue growing in the coming years and to become more diversified as new air connections are established.

However, intraregional travel still has considerable growth potential, as seen in the expansion of low-cost airlines and new air routes, as well as the increasing viability of cross-border trips by land, thanks to the development of major infrastructure projects.

Figure 1.18 Asia and the Pacific outbound travel to world regions, 2010–2018 (% aggregate change)[1]



1 Asian arrivals in world destinations.

Source: World Tourism Organization (UNWTO).

Table 1.11 Outbound tourism from Asia and the Pacific by subregion of destination[a]

Outbound to:	International tourist arrivals (× 1,000)						Share (%)		Change (%)		Av. annual (%)
	2000	2005	2010	2016	2017	2018*	2010	2018*	17/16	18*/17	10–18*
Total	**113,846**	**152,856**	**205,257**	**314,450**	**337,588**	**358,673**	**100**	**100**	**7.4**	**6.2**	**7.2**
To:											
Asia and the Pacific	**84,402**	**120,191**	**162,108**	**243,442**	**258,148**	**273,859**	**79.0**	**76.4**	**6.0**	**6.1**	**6.8**
North-East Asia	49,233	72,474	94,867	135,253	139,679	147,403	46.2	41.1	3.3	5.5	5.7
South-East Asia	26,740	37,599	55,377	89,290	97,662	104,941	27.0	29.3	9.4	7.5	8.3
Oceania	6,381	7,444	7,908	11,333	11,997	12,241	3.9	3.4	5.9	2.0	5.6
South Asia	2,047	2,675	3,955	7,565	8,811	9,274	1.9	2.6	16.5	5.3	11.2
Interregional	**29,444**	**32,665**	**43,150**	**71,008**	**79,440**	**84,814**	**21.0**	**23.6**	**11.9**	**6.8**	**8.8**
Europe	**14,645**	**17,686**	**22,328**	**37,804**	**44,175**	**46,657**	**10.9**	**13.0**	**16.9**	**5.6**	**9.6**
Northern Europe	3,100	3,447	3,552	5,625	6,581	6,480	1.7	1.8	17.0	-1.5	7.8
Western Europe	7,026	7,695	8,756	15,946	17,495	18,419	4.3	5.1	9.7	5.3	9.7
Central/Eastern Europe	1,716	3,022	3,823	6,396	7,585	7,992	1.9	2.2	18.6	5.4	9.7
Southern/Mediter. Eu.	2,802	3,523	6,198	9,838	12,514	13,766	3.0	3.8	27.2	10.0	10.5
Americas	**10,112**	**9,024**	**10,312**	**17,357**	**18,184**	**18,880**	**5.0**	**5.3**	**4.8**	**3.8**	**7.9**
North America	9,698	8,413	9,550	15,849	16,658	17,276	4.7	4.8	5.1	3.7	7.7
Caribbean	74	77	94	217	249	265	0.0	0.1	14.9	6.4	13.8
Central America	67	100	117	152	153	149	0.1	0.0	0.4	-2.2	3.1
South America	272	434	551	1,139	1,124	1,190	0.3	0.3	-1.3	5.9	10.1
Africa	**753**	**1,080**	**1,854**	**2,633**	**2,843**	**3,013**	**0.9**	**0.8**	**8.0**	**6.0**	**6.3**
North Africa	78	198	245	367	486	524	0.1	0.1	32.4	8.0	10.0
Subsaharan Africa	675	882	1,609	2,266	2,357	2,489	0.8	0.7	4.0	5.6	5.6
Middle East	**3,935**	**4,875**	**8,656**	**13,214**	**14,239**	**16,263**	**4.2**	**4.5**	**7.8**	**14.2**	**8.2**

Source: World Tourism Organization (UNWTO).

a) Data as collected by UNWTO (August 2019), including estimates for countries with missing data.

* Provisional data.

1.3.2 International tourism expenditure and trips

Asia and the Pacific generates more than one third of the world's international tourism spending

Travellers from Asia and the Pacific (both overnight and same-day) spent USD 524 billion on international tourism in 2018, about 36% of the world total. This proportion has grown from 24% in 2010 as a result of several years of double-digit growth. North-East Asia accounts for the largest part of this spending (72%), most of which from mainland China (53%). South-East Asia accounts for 15% of Asian tourism spending, while Oceania and South Asia account for 8% and 5% respectively.

China is the world's top international tourism spender

China continues to lead global outbound travel after remarkable expansion in the past two decades, including double-digit growth in spending every year between 2004 and 2015. Chinese expenditure surged from USD 13 billion in 2000 to USD 277 billion in 2018, according to export data from the balance of payments.[7]

In 2018 spending by Chinese travellers grew by 5% (in real terms), an increase of nearly USD 20 billion from the previous year. China now accounts for more than half of Asia's tourism expenditure and generates almost one-fifth of the world's international tourism receipts.

Rising disposable incomes in a country with the largest population in the world, coupled with lower travel costs, particularly low-cost airlines, and the easing of restrictions on international travel have boosted outbound tourism in the recent past. This has contributed to growing inbound tourism in many destinations in Asia and around the world.

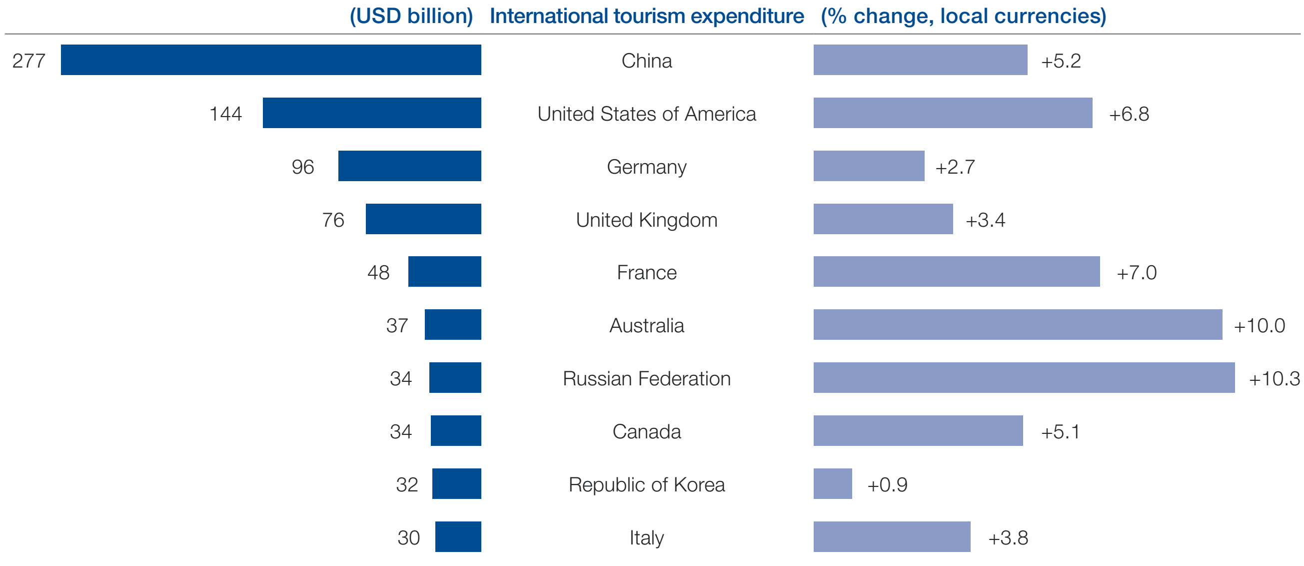
In fact, Asia is the world's most open region in terms of travel facilitation, with a visa openness index of 45, followed by the Americas and Africa (both 40). Only 40% of the world population required a traditional visa to visit Asia and the Pacific destinations in 2018, compared to a world average of 53%. Conversely, 60% of residents of Asia and the Pacific needed a traditional visa to travel abroad in 2018, down from 85% ten years earlier.[8]

China's strong demand for international travel can also be seen in its volume of outbound trips. Mainland Chinese travellers took 150 million trips abroad in 2018 (total departures including same-day trips, as reported by China), the majority of which to North-East Asian and South-East Asian destinations.

This makes it the largest generator of trips in Asia and the world. International trips from China increased 15% in 2018, more than double the market's count in 2010. Much of this travel however, corresponds to land crossings to Hong Kong (China) and Macao (China) for short stays.

Among other major source markets is Australia, the 2nd largest tourism spender in the region and 6th in the world,

Figure 1.19 World's top 10 international tourism spenders, 2018 (USD billion and real % change)



Source: World Tourism Organization (UNWTO).

Note: Expenditure correspond to the 'travel' debit item in the balance of payments of countries.

with USD 37 billion reported in 2018. The Republic of Korea, Hong Kong (China) and Singapore are the next largest spenders. These four markets combined represent 23% of international tourism expenditure in Asia and the Pacific.

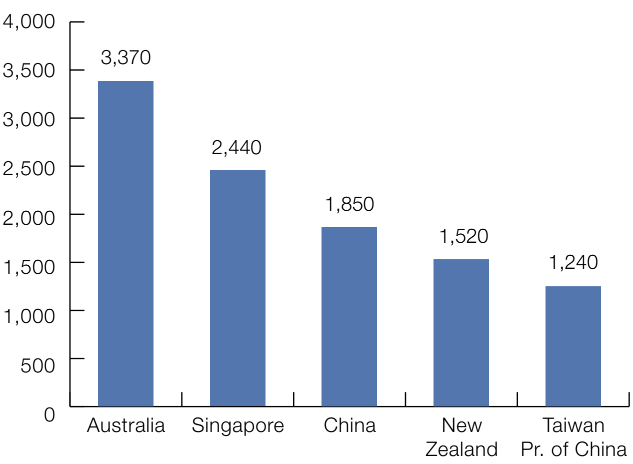
Australia and Singapore report highest spending per trip

Travellers from Australia and Singapore spent the most per outbound trip in 2018, an average USD 3,370 and USD 2,440 respectively. China, New Zealand and Taiwan Province of China are also large spenders per trip in US dollar terms.

High income per capita can help explain higher relative spending, as well as huge distances between source markets and destinations. This is especially the case of Australia and New Zealand, which lie very far from major destinations in the region, let alone Europe or the Americas. Tourists from these remote markets tend to travel farther afield and for longer periods of time.

On the other side of the spectrum, Hong Kong (China) has a very low expenditure per trip (USD 290), despite being the fourth largest tourism spender in absolute terms. This is the result of its sheer volume of departures, most of which are short trips to mainland China.

Figure 1.20 Top tourism spenders in Asia and the Pacific per outbound trip, 2018 (USD)



Source: World Tourism Organization (UNWTO).

Per capita spending still low in most subregions due to huge population

Relative to the region's population, tourism expenditure in Asia is still low, with an average of USD 125 per inhabitant, compared with a worldwide average of USD 193 in 2018. This modest figure reflects the region's huge population, but also the great potential for growth in international travel, which in some markets is still limited to a relatively small part of the population.

This is changing rapidly however, with the growing affluence of the middle classes and the drop in the cost of air travel – partly the result of the rapid increase in LCC services. The supply of tourism services through digital platforms, sometimes referred to as 'sharing economy', has also made international travel more accessible to a larger part of society, both in Asia and the world overall.

International tourism expenditure per capita varies considerably across subregions. Oceania boasts the highest spending per inhabitant (USD 1,000) for the same reasons mentioned above regarding high spending per trip in Australia and New Zealand. This figure is comparable to that of Western Europe (USD 1,100), though it contrasts sharply with that of South Asia (USD 14) and South-East Asia (USD 120). Average outbound spending per capita in North-East Asia is USD 230.

By individual markets, Singapore is the highest tourism spender per capita in Asia, with USD 4,500 in 2018. Australia and Hong Kong (China) are the next largest spenders, with USD 1,500 and USD 1,100 spent per inhabitant respectively. These markets are high-income economies with relatively small populations.

High departure figures reflect many short trips over land

Outbound tourism can also be measured in number of departures, though this information is not always comparable across markets due to differences in definition or coverage (see below).

Departures from some markets are remarkably high, as they include many short trips by land to bordering countries. Hong Kong (China) recorded a total 91 million departures in 2018, the second highest after China (150 million). However, much travel from these markets corresponds to short trips overland to each other, and to Macao (China).

Other large markets measured in departures are the Republic of Korea (27 million trips), India (26 million), Japan (18 million) and Taiwan Province of China (16 million). The strongest growth in outbound trips last year was reported by Korea (+18%), Iran (+17%) and China (+15%).

Data on outbound trips should be interpreted with caution, as this is not always homogenous and thus comparable across countries. In some cases departures refer to overall visitors (both overnight and same-day travellers), while in others it includes only tourists (overnight visitors). In the table, "VD" corresponds to total departures (both overnight and same-day travellers) while "TD" refers to departures of overnight travellers only. For some countries no departure data is available.

It is also worth noting that the number of outbound trips (departures reported by source markets) does not correspond with the number of arrivals reported by destinations from a particular source country, since a single trip can generate arrivals in multiple destinations.

Table 1.12 Top outbound markets in Asia and the Pacific

Rank in:		Country	International tourism expenditure[1] (USD billion)		Change (%, local currencies)	Per departure (USD)	Series	International departures (million)		Change (%)	
Region	World		2017	2018*	18*/17	2018*		2017	2018*	17/16	18*/17
1	1	China	257.9	277.3	5.2	1,850	TD	130.5	149.7	7.0	14.7
2	6	Australia	34.4	36.8	9.7	3,365	VD	10.4	10.9	5.9	5.2
3	9	Republic of Korea	31.7	32.0	0.9	1,205	VD	22.4	26.5	15.9	18.4
4	11	Hong Kong (China)	25.4	26.5	5.0	290	VD	91.8	91.3	3.0	-0.5
5	13	Singapore	24.6	25.3	0.7	2,440	TD	9.9	10.4	4.4	4.9
6	16	India	18.4	21.3	21.7	810	TD	23.9	26.3	9.5	9.8
7	17	Japan	18.2	20.2	9.2	1,125	VD	17.1	17.9	5.6	4.5
8	18	Taiwan Pr. of China	18.0	19.4	7.8	1,240	VD	14.6	15.7	10.7	7.3
9	26	Thailand	10.5	12.4	12.0	..	TD	9.0	..	9.3	..
10	27	Philippines	11.8	12.0	1.6	..	TD	..	..	..	..
11	28	Malaysia	10.7	12.0	5.4	..	..	..	..	..	..
12	31	Iran	11.3	..	..	..	VD	9.0	10.5	36.1	17.1
13	37	Indonesia	8.3	8.8	5.8	925	TD	8.9	9.5	6.2	6.9
14	45	Viet Nam	5.0	5.7	13.7	..	..	..	..	..	..
15	48	New Zealand	4.4	4.6	6.7	1,520	TD	2.9	3.0	9.3	6.5
16	66	Pakistan	2.0	1.8	-11.3	..	..	..	..	..	..
17	70	Sri Lanka	1.6	1.7	3.8	1,130	TD	1.4	1.5	-0.6	2.2
18	76	Macao (China)	1.3	..	..	..	VD	1.3	1.4	-14.7	11.2
19	81	Lao PDR	1.0	0.9	-5.0	305	VD	3.1	3.0	-0.3	-0.3
20	85	Cambodia	0.7	0.8	14.2	425	TD	1.8	2.0	22.2	13.9

Key: TD: tourist departures (overnight visitors, excludes same-day visitors).

VD: visitor departures (overnight and same-day visitors).

* Provisional data.

Data as collected by UNWTO (August 2019).

1 International expenditure is based on the 'travel' debit item in the balance of payments of countries.

Source: World Tourism Organization (UNWTO).

Table 1.13 International tourist arrivals by country of destination

Arrivals in:		International tourist arrivals (× 1,000)					Share in region (%)		Change (%)		Av. annual (%)	Arrivals/ 100 inhab.[a]
	Series	2010	2015	2016	2017	2018*	2010	2018*	17*/16	18*/17	10–18*	2018*
Asia and the Pacific		**208,174**	**284,636**	**306,580**	**324,041**	**347,731**	**100**	**100**	**5.7**	**7.3**	**6.6**	**8**
North-East Asia		**111,508**	**142,075**	**154,302**	**159,515**	**169,190**	**53.6**	**48.7**	**3.4**	**6.1**	**5.3**	**10**
China	TF	55,665	56,886	59,270	60,740	62,900	26.7	18.1	2.5	3.6	1.5	5
Hong Kong (China)	TF	20,085	26,686	26,553	27,885	29,263	9.6	8.4	5.0	4.9	4.8	391
Japan	VF	8,611	19,737	24,039	28,691	31,192	4.1	9.0	19.4	8.7	17.5	25
DPR Korea		..	..	..	..	..		..			..	..
Republic of Korea	VF	8,798	13,232	17,242	13,336	15,347	4.2	4.4	-22.7	15.1	7.2	30
Macao (China)	TF	11,926	14,308	15,704	17,255	18,493	5.7	5.3	9.9	7.2	5.6	2,794
Mongolia	TF	456	386	404	469	529	0.2	0.2	16.1	12.8	1.9	16
Taiwan Pr. of China	VF	5,567	10,440	10,690	10,740	11,067	2.7	3.2	0.5	3.0	9.0	47
South-East Asia		**70,473**	**104,243**	**110,771**	**120,466**	**128,680**	**33.9**	**37.0**	**8.8**	**6.8**	**7.8**	**20**
Brunei	TF	214	218	219	259	278	0.1	0.1	18.3	7.4	3.3	64
Cambodia	TF	2,508	4,775	5,012	5,602	6,201	1.2	1.8	11.8	10.7	12.0	38
Indonesia	VF/TF	7,003	9,963	11,072	12,948	13,396	3.4	3.9	16.9	3.5	8.4	5
Lao PDR	TF	1,670	3,543	3,315	3,257	3,770	0.8	1.1	-1.8	15.8	10.7	56
Malaysia	TF	24,577	25,721	26,757	25,948	25,832	11.8	7.4	-3.0	-0.4	0.6	80
Myanmar	TF	792	4,681	2,907	3,443	3,551	0.4	1.0	18.4	3.1	20.6	7
Philippines	TF	3,520	5,361	5,967	6,621	7,129	1.7	2.1	11.0	7.7	9.2	7
Singapore	TF	9,161	12,052	12,914	13,909	14,673	4.4	4.2	7.7	5.5	6.1	260
Thailand	TF	15,936	29,923	32,530	35,483	38,277	7.7	11.0	9.1	7.9	11.6	57
Timor-Leste	TF	40	62	66	74	75	0.0	0.0	12.5	1.1	8.1	6
Viet Nam	VF	5,050	7,944	10,013	12,922	15,498	2.4	4.5	29.1	19.9	15.0	16
Oceania		**11,468**	**14,284**	**15,634**	**16,580**	**17,044**	**5.5**	**4.9**	**6.1**	**2.8**	**5.1**	**41**
American Samoa	TF	23	20	20	20	..	0.0	..	-0.3		..	36
Australia	VF	5,872	7,450	8,269	8,815	9,246	2.8	2.7	6.6	4.9	5.8	37
Cook Islands	TF	104	125	146	161	169	0.1	0.0	10.2	4.6	6.2	969
Fiji	TF	632	755	792	843	870	0.3	0.3	6.4	3.3	4.1	98
French Polynesia	TF	154	184	192	199	216	0.1	0.1	3.4	8.7	4.3	76
Guam	TF	1,197	1,409	1,536	1,544	1,552	0.6	0.4	0.6	0.5	3.3	937
Kiribati	TF	5	4	6	6	..	0.0	..	1.1		..	5
Marshall Islands	TF	5	6	10	6	..	0.0	..	-39.0		..	11
Micronesia FSM	TF	45	31	30	..	..	0.0	..			..	29
N. Mariana Islands	VF	379	479	531	660	518	0.2	0.1	24.3	-21.5	4.0	938
New Caledonia	TF	99	114	116	121	120	0.0	0.0	4.3	-0.3	2.5	43
New Zealand	TF	2,435	3,039	3,370	3,555	3,686	1.2	1.1	5.5	3.7	5.3	75
Niue	TF	6	8	8	10	..	0.0	..	25.4		..	606
Palau	TF	85	164	138	123	116	0.0	0.0	-11.5	-5.4	4.0	644
Papua New Guinea	TF	140	201	156	143	..	0.1	..	-8.2		..	2
Samoa	TF	122	128	134	146	164	0.1	0.0	8.8	12.4	3.8	83
Solomon Islands	TF	21	22	22	26	28	0.0	0.0	18.5	8.4	3.9	4
Tonga	TF	47	54	61	62	..	0.0	..	1.6		..	62
Tuvalu	TF	2	2	2	2	..	0.0	..	0.0		..	22
Vanuatu	TF	97	90	95	109	116	0.0	0.0	14.8	5.9	2.2	41
South Asia		**14,726**	**24,035**	**25,873**	**27,480**	**32,817**	**7.1**	**9.4**	**6.2**	**19.4**	**10.5**	**2**
Afghanistan		..	..	..	..	..		..			..	..
Bangladesh	TF	303	643	830	1,026	..	0.1	..	23.6		..	1
Bhutan	TF	41	155	210	255	274	0.0	0.1	21.5	7.6	26.8	34
India	TF	5,776	13,284	14,570	15,543	17,427	2.8	5.0	6.7	12.1	14.8	1
Iran	TF/VF	2,938	5,237	4,942	4,867	7,295	1.4	2.1	-1.5	49.9	12.0	9
Maldives	TF	792	1,234	1,286	1,390	1,484	0.4	0.4	8.0	6.8	8.2	406
Nepal	TF	603	539	753	940	1,173	0.3	0.3	24.9	24.8	8.7	4
Pakistan	TF	907	..	..	..	..	0.4	..			..	..
Sri Lanka	TF	654	1,798	2,051	2,116	2,334	0.3	0.7	3.2	10.3	17.2	11

Source: World Tourism Organization (UNWTO). * Provisional data.

a) Compiled by UNWTO from International Monetary Fund (IMF), World Economic Outlook, April 2019 and UNWTO (August 2019).

Note: Please see page 28 for Key to symbols and abbreviations.

Table 1.14 International tourism receipts by country of destination

Arrivals in:	International tourism receipts (USD million)					Share in region (%)		Receipts	
								per arrival[b,c]	per capita[a]
	2010	2015	2016	2017	2018*	2010	2018*	(USD)	(USD)
Asia and the Pacific	**254,367**	**355,909**	**371,452**	**395,996**	**435,460**	**100**	**100**	**1,250**	**104**
North-East Asia	**122,964**	**167,111**	**169,544**	**168,130**	**188,429**	**48.3**	**43.3**	**1,115**	**115**
China	45,814	44,969	44,432	38,559	40,386	18.0	9.3	640	29
Hong Kong (China)	22,200	36,150	32,846	33,339	36,703	8.7	8.4	1,255	4,905
Japan	13,199	24,982	30,679	34,054	41,115	5.2	9.4	1,320	325
DPR Korea	..	..	..	..	..		..	..	..
Republic of Korea	10,328	15,214	17,332	13,368	15,319	4.1	3.5	1,000	297
Macao (China)	22,276	30,981	30,373	35,575	40,187	8.8	9.2	2,175	60,706
Mongolia	244	246	316	396	461	0.1	0.1	870	142
Taiwan Pr. of China	8,721	14,387	13,375	12,315	13,704	3.4	3.1	1,240	581
South-East Asia	**68,547**	**108,680**	**116,981**	**130,632**	**142,314**	**26.9**	**32.7**	**1,105**	**219**
Brunei	..	147	144	177	190		0.0	685	438
Cambodia	1,519	3,130	3,207	3,636	4,352	0.6	1.0	700	268
Indonesia	6,958	10,761	11,206	13,139	14,110	2.7	3.2	1,055	53
Lao PDR	382	724	716	761	734	0.2	0.2	195	108
Malaysia	18,115	17,584	18,075	18,323	19,143	7.1	4.4	740	591
Myanmar	72	2,120	2,197	1,969	..	0.0	..	570	37
Philippines	2,645	5,272	5,143	6,988	7,461	1.0	1.7	1,045	70
Singapore	14,178	16,617	18,944	19,738	20,528	5.6	4.7	1,400	3,640
Thailand	20,104	44,922	48,792	56,938	63,042	7.9	14.5	1,645	930
Timor-Leste	31	51	58	73	..	0.0	..	985	59
Viet Nam	4,450	7,350	8,500	8,890	10,080	1.7	2.3	650	107
Oceania	**42,794**	**48,046**	**51,640**	**57,375**	**61,097**	**16.8**	**14.0**	**3,585**	**1,462**
American Samoa	..	..	22	22	..		..	1,100	395
Australia	32,584	34,246	37,040	41,732	45,035	12.8	10.3	4,870	1,789
Cook Islands	111	116	137	153	..	0.0	..	950	8,803
Fiji	634	805	863	926	956	0.2	0.2	1,100	1,074
French Polynesia	406	466	488	..	..	0.2	..	2,535	1,742
Guam	..	..	..	..	..		..	..	..
Kiribati	4	2	3	4	..	0.0	..	705	36
Marshall Islands	4	1	5	..	..	0.0	..	530	96
Micronesia FSM	24	25	..	..	..	0.0	..	..	..
N. Mariana Islands	..	..	..	..	..		..	..	..
New Caledonia	129	158	159	..	..	0.1	..	1,375	583
New Zealand	6,522	9,359	9,820	10,593	11,004	2.6	2.5	2,985	2,233
Niue	2	..	..	..	..	0.0	..	..	..
Palau	73	149	141	116	..	0.0	..	945	6,444
Papua New Guinea	2	2	1	2	..	0.0	..	15	0
Samoa	132	142	148	166	..	0.1	..	1,135	839
Solomon Islands	44	51	56	67	81	0.0	0.0	2,905	129
Tonga	16	43	51	48	48	0.0	0.0	775	477
Tuvalu	2	..	..	..	..	0.0	..	..	..
Vanuatu	217	228	..	..	..	0.1	..	..	..
South Asia	**20,063**	**32,071**	**33,287**	**39,858**	**43,620**	**7.9**	**10.0**	**1,330**	**23**
Afghanistan	75	79	49	2	..	0.0	..	..	0
Bangladesh	81	150	214	337	353	0.0	0.1	330	2
Bhutan	40	94	91	103	102	0.0	0.0	370	125
India	14,490	21,013	22,427	27,365	28,568	5.7	6.6	1,640	21
Iran	2,438	4,388	3,713	4,402	..	1.0	..	905	54
Maldives	1,713	2,569	2,506	2,744	3,028	0.7	0.7	2,040	8,273
Nepal	344	481	446	630	..	0.1	..	670	21
Pakistan	306	317	322	352	390	0.1	0.1	..	2
Sri Lanka	576	2,981	3,518	3,925	4,381	0.2	1.0	1,875	202

Source: World Tourism Organization (UNWTO). * Provisional data.

a) Compiled by UNWTO from International Monetary Fund (IMF), World Economic Outlook, April 2019 and UNWTO (August 2019).

b) Latest year with data available.

c) Data should be interpreted with caution for countries with many same-day visitors, as receipts include same-day visits and international tourist arrivals do not.

1.4 Tourism prospects

1.4.1 Recent results and short-term outlook

International tourist arrivals grew 4% in the first half of 2019.

International tourist arrivals (overnight visitors) worldwide grew 4% in January–June 2019 compared to the same period last year, reflecting a continuation of the solid trend seen in 2018 (+5%) though at a somewhat slower pace.

By regions, the Middle East (+8%) and Asia Pacific (+6%) saw the strongest increase in arrivals, followed by Europe (+4%) which grew in line with the world average. Africa (+3%) and the Americas (+2%) recorded more moderate growth this first half of 2019.

By Asian subregions, South Asia and North-East Asia led results (both +7%) fuelled by robust intraregional demand, much of which from China. South-East Asia recorded 5% more international arrivals this six-month period and Oceania 1% more.

Results through June 2019 were driven by a largely robust economy, increased air connectivity and simpler visa procedures in many destinations around the world. Yet, weaker economic indicators, uncertainty about *Brexit* and global trade tensions could take a toll on tourism growth in the second half of the year. The UNWTO Confidence Index for September–December 2019 shows a slight decline in expectations for those last months of the year.[9]

1.4.2 Opportunities and challenges

Strong growth potential for Asian tourism following remarkable expansion in the past decades.

Asia and the Pacific is the second most visited region in the world after Europe and the world's second largest in economic terms, after the Americas. It is also the world's second largest tourism earner, accounting for 30% of the world's international tourism receipts. Asia is also the world's most populous region, with a staggering 4.2 billion inhabitants or 56% of the population on the planet. Due to its strong development and sheer size, Asia's economic and political prominence has grown rapidly over the past decades, driven particularly by China and India, the countries with the biggest populations on earth.

Between 2000 and 2018, Asia experienced the fastest growth in international tourism of all world regions, with international arrivals more than tripling, from 110 to 348 million. This represents an average 7% increase per year, above the world average of 5% per year. The growth trend continued well into 2019, with international arrivals increasing by 6% in January–June, compared to the same period a year earlier – the second strongest increase after the Middle East (+8%).

Despite this expansion, the potential for future growth remains strong. Asia and the Pacific receives an average 8 international tourists per 100 inhabitants, well below the world average of 19. International tourism receipts are also low relative to the region's population, with USD 103 per capita, versus a world average of USD 193.

Both large and small destinations can benefit from this growth potential provided they continue to create adequate conditions for a healthy business environment, that they encourage air connectivity and promote visa facilitation. In some destinations, infrastructure remains an ongoing challenge for tourism development, while others have invested heavily in large-scale projects.

Public infrastructure such as highways, bridges, railways and airports can help unlock the full potential of export revenues and job creation through tourism, while serving other urban and regional development purposes. Export earnings from tourism already make up 6% of Asia's total exports in US dollar terms. Destinations that continue to develop their infrastructure while preserving their cultural and natural heritage are posed to see continued expansion in numbers, as well as reputation.

Sustainability needs to be at the core of development efforts in all destinations, big and small. Policies should take into account the impacts of visitor flows, including economic, social and environmental effects, through effective planning and dispersal policies. Both public and private initiatives can strive to preserve the environment and respect the host communities, while serving the needs of visitors and the industry. The intangible elements of a country's culture, including art, music, gastronomy and local customs constitute treasured assets of human heritage, but also core tourist attractions which will continue to bring in visitors for generations. Tourism can make optimal use of both cultural and environmental resources, while respecting local residents and ensuring viable, long-term economic operations.

One of the fastest growing tourism products in Asia and the Pacific is health tourism. Numerous countries have identified this as one of the key development areas for the future. Health tourism includes both medical tourism, which means travelling for therapeutic reasons, and wellness tourism, which combines both therapeutic and leisure activities, often associated with gyms, saunas, hot springs or spas. *Wellness tourism* in the UNWTO/ETC publication *Exploring Health Tourism* is defined as follows:

> "A type of tourism activity which aims to improve and balance all of the main domains of human life including physical, mental, emotional, occupational, intellectual and spiritual."

Asia has been known as a world leader in medical tourism for more than a decade, while services related to wellness or wellbeing are also part of the tourism product range in many destinations. Asian health systems and those associated with tourism tend to emphasize body-mind-spirit connections, including activities such as yoga and ayurveda from India, Hindu and Buddhist meditation, massage therapies, Chinese Tai Chi and traditional Chinese and Korean medicine. These activities are both health and cultural tourism, as they are health-related on one hand and authentically Asian on the other, even if some have become increasingly popular in the western world.

Travelling for health purposes has probably never received as much interest as it does currently and Asian destinations can continue to leverage on this important tourism segment. Various social, economic and political factors, as well as technological innovations are increasing the demand as well as the supply of wellness and medical services.

Like in other world regions, new technologies have transformed the overall tourism industry in Asia. Online platforms and mobile apps have made the planning and reservation process faster and simpler, they have improved marketing operations for suppliers and ultimately reduced travel costs, which has fueled demand considerably. Digital platforms such as travel aggregators and online travel agencies have increased the supply of tourism services, while social media applications have contributed to the promotion of destinations and the actual travel experience.

Some destinations in Asia are at the forefront of digitalization and information and communications technology or ICT readiness. Many are taking advantage of big data for the analysis of traveller behaviour and design of tourism policies, possible thanks to surging numbers of Internet and mobile Internet subscriptions. Artificial intelligence is also playing an increasing role in Asian tourism, by helping tourism providers analyze traveller profile through their preferences, budgets or location and by producing personalized suggestions for travellers.

As a rapidly expanding region, Asia and the Pacific can continue to develop its own tools and strategies for growth by taking advantage of its world-class attractions and cultural assets, while leveraging on digital and mobile technology. As economic prosperity continues to grow, industry professionals will face the challenge of effectively and sustainably meeting the demands of travelers. Governments should also ensure that tourism is at the heart of their policy-making and in line with the UN's sustainable development goals (SDGs). Policies that promote environmental and heritage conservation through effective planning, including smart mobility or tourism dispersal, will contribute most efficiently to healthy and sustainable growth in one of Asia's most vibrant and dynamic economic sectors.

Chapter 1 Endnotes

1 International Monetary Fund (IMF), *World Economic Outlook Database, April 2019* (online), available at: www.imf.org/external/pubs/ft/weo/2019/01/weodata/index.aspx (27-08-2019).

2 Ibid.

3 Ibid.

4 International tourism receipts are based on the travel credit item of the balance of payments of countries. For more information see: International Civil Aviation Organization (2018), *Solid passenger traffic growth and moderate air cargo demand in 2018* (online), available at: www.icao.int/Newsroom/Pages/Solid-passenger-traffic-growth-and-moderate-air-cargo-demand-in-2018.aspx.

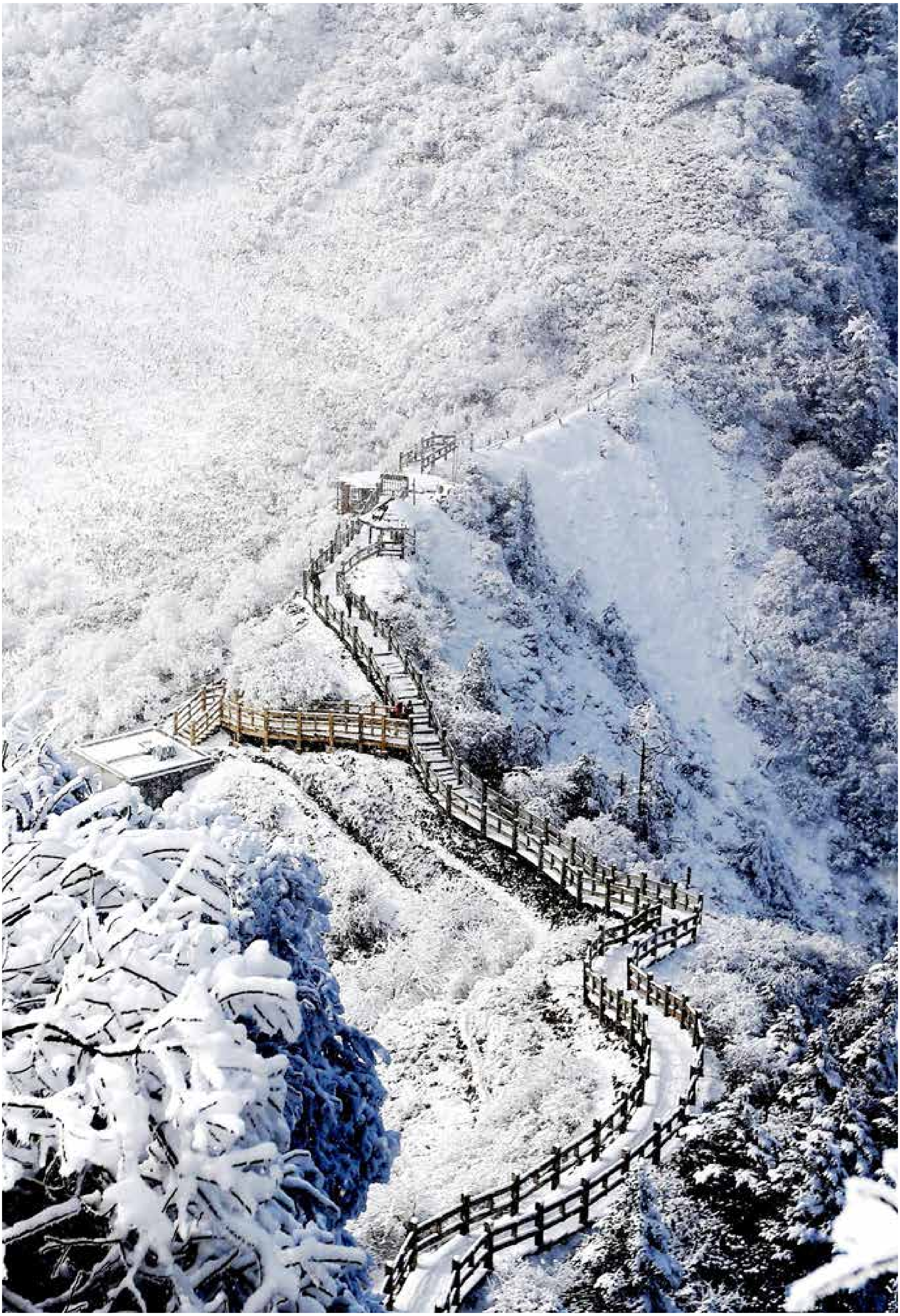
5 The origin of about 2% of international arrivals in Asia and the Pacific is not specified.

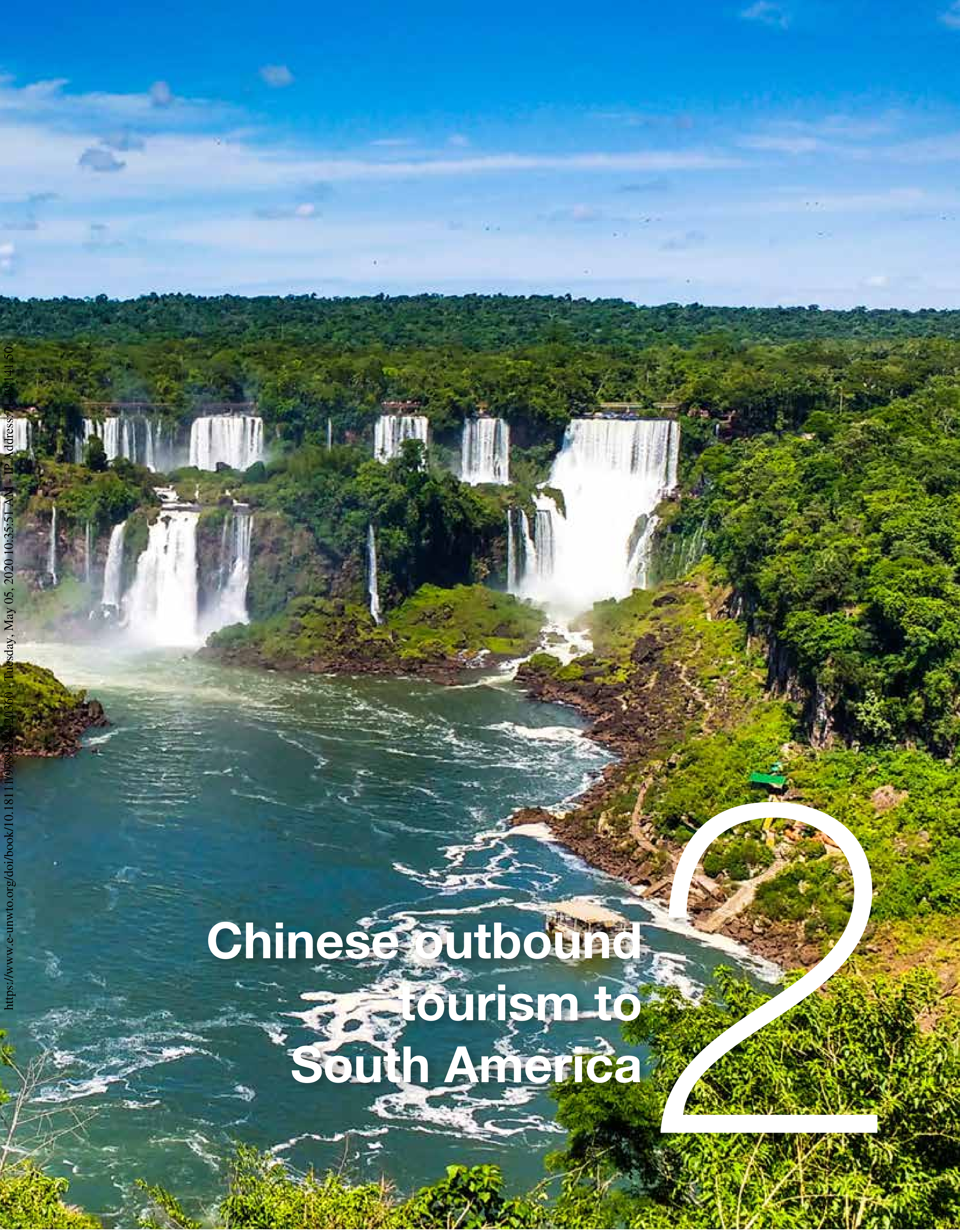
6 International Civil Aviation Organization (2018), *Solid passenger traffic growth and moderate air cargo demand in 2018* (online), available at: www.icao.int/Newsroom/Pages/Solid-passenger-traffic-growth-and-moderate-air-cargo-demand-in-2018.aspx

7 Data reflected by UNWTO on international tourism receipts and expenditure for China is based on the balance of payments (BOP) travel credit and debit items (as with other countries for reasons of consistency and international comparability) reported by the State Administration of Foreign Exchange (SAFE) at www.safe.gov.cn/en/BalanceofPayments/index.html. According to the *International Recommendations for Tourism Statistics 2008* (IRTS 2008), the balance of payments includes both business and personal purposes in the 'travel' item. Business travel covers goods and services acquired by persons going abroad for all types of business activities. Personal travel covers goods and services acquired by persons going abroad for purposes other than business, such as vacations, participation in recreational and cultural activities, visits with friends and relatives, pilgrimages, and education and health-related purposes. The 'travel' item does not include international passenger transport, which is reported in a separate category in the BOP under 'transport'. See further in the *International Recommendations for Tourism Statistics 2008* (IRTS 2008) at statistics.unwto.org/content/methodology-0 and the *IMF Balance of Payments and International Investment Position Manual* (BPM6) at www.imf.org/external/pubs/ft/bop/2007/bopman6.htm. It should also be noted that there is a difference in the data used by UNWTO and those produced by the Ministry of Culture and Tourism (formerly the China National Tourism Administration) for 2014 and subsequent years.

8 World Tourism Organization (2019), *Visa Openness Report 2018* (presentation), available at: http://cf.cdn.unwto.org/sites/all/files/docpdf/2018visaopennessreport.pdf.

9 World Tourism Organization (2019), *UNWTO World Tourism Barometer,* volume 17, issue 3, September 2019, DOI: https://doi.org/10.18111/wtobarometereng.





2 Chinese outbound tourism to South America

2.1 Overview of the Chinese outbound tourism market

2.1.1 Chinese outbound tourism market development trends

The substantial growth of Chinese outbound travel started at the turn of the 21st century as the result of increasingly loosened policies, diversifying consumer demands and profound changes in the market. Supported by stable economic growth, increased direct air connectivity, market openness and travel facilitation, the Chinese outbound tourism market developed rapidly over the past decade. The number of outbound trips shows an average growth rate of 16% a year between 2000 (10.5 million) and 2018 (150 million).[1] At the same time, tourism expenditure from China surged from USD 13 billion in 2000[2] to USD 277 billion in 2018.[3] China has developed into the leading force in global tourism, ranking as the largest source market in the world in terms of both trips abroad and international tourism expenditure.

Following remarkable growth and development in recent years, Chinese outbound tourism is also undergoing important changes in market structure and customer demands.

The Chinese outbound tourism market will maintain strong growth

Despite the slower rate of economic growth, China's economic structure is expected to maintain continuous improvement and achieve a higher-quality growth. Together with stable economic development, other factors such as increased disposal incomes of urban residents, upgraded consumption level, simplified visa policies of foreign countries, enrichment of tourism products and enhanced promotion of destinations will all contribute to the continuous growth of China's outbound tourism.

China is the most populous country in the world. According to the statistics provided by the National Immigration Administration of China, only around 10% of the Chinese population (173 million people) held a passport as of 2017. However, the number of Chinese overseas trips amounted to 71.3 million, excluding travel to Hong Kong (China), Macao (China) and Taiwan Province of China, which means that less than five out of the 100 mainland residents ever travelled abroad and that the potential of the overseas travel is immense.[4] The number of Chinese outbound trips is expected to reach 166 million in 2019, up by 11% over 2018.[5]

The second- and third-tier tourist source markets have huge potential and will play a major role in the growth of Chinese outbound tourism

The traditional first-tier regions of Beijing, Shanghai and Guangzhou are the main source markets of Chinese outbound tourists. They will continue to maintain a high level of growth, particularly in terms of long-haul travel. However, the second- and third-tier regions have larger populations and huge market potential for higher growth. The outbound tourism markets of the second- and third-tier regions have grown faster than the first-tier tourist source market for the last couple of years. According to the *Big Data Report on Chinese Outbound Tourism 2018,*[6] Chinese outbound tourists came from more than 200 domestic source cities in 2018. The top 10 tourist departure cities in terms of year-on-year outbound tourists growth include such second- and third-tier cities as Zunyi, Guiyang, Nanchang, Kunming, Chongqing, Yiwu, Jinan, Zhengzhou, Nanning and Taiyuan.

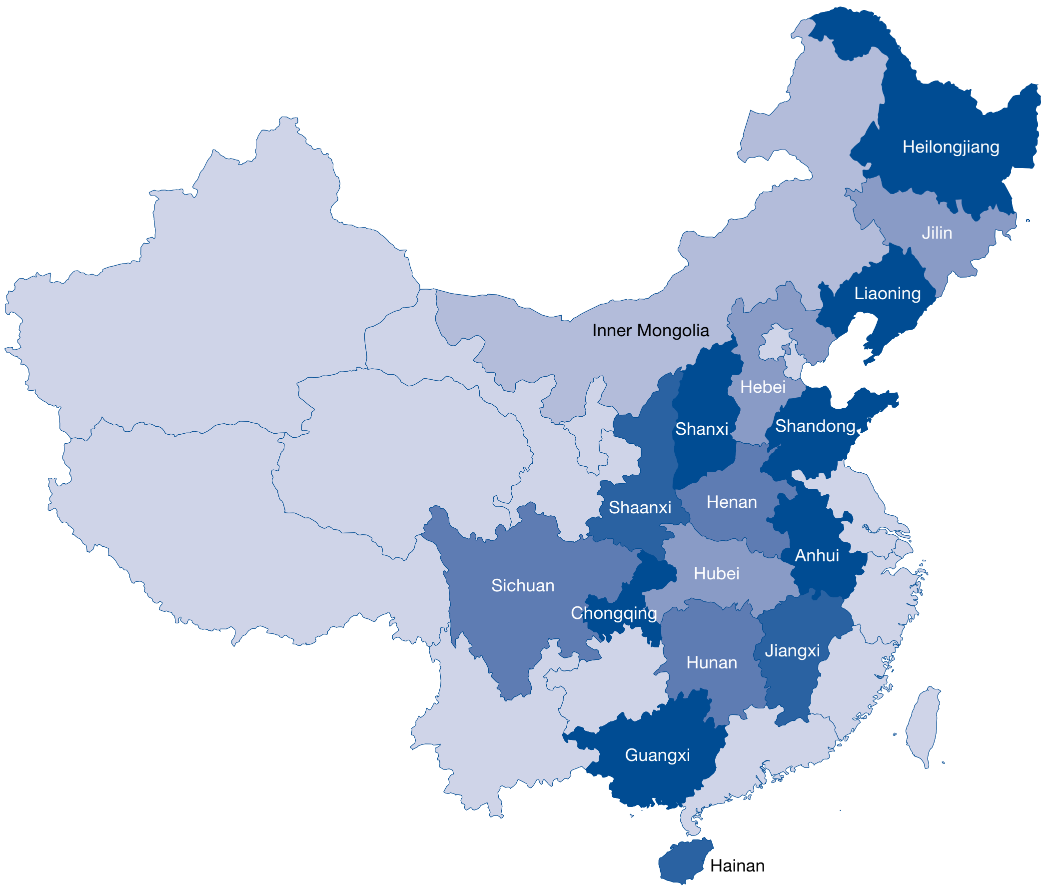
Table 2.1 Top 10 tourist departure cities in China of year-on-year outbound tourist growth, 2018

Ranking	City
1	Zunyi
2	Guiyang
3	Nanchang
4	Kunming
5	Chongqing
6	Yiwu
7	Jinan
8	Zhengzhou
9	Nanning
10	Taiyuan

Source: Ctrip Group.

Residents in second-and third tier source markets have also shown stronger buying power on their overseas trips. Changchun, Wenzhou, Xiamen, Qingdao, Suzhou and several other cities in second-tier region were ranked among the top 20 source cities in terms of outbound tourism consumption.[7] There is no doubt that the second-

Figure 2.1 Distribution of tier 2 tourist-generating regions in China



Source: World Tourism Organization, adapted from © Pablo Fernandez Rivera | Dreamstime.com.

and third-tier tourist source markets will play a major role in contributing to the future growth of Chinese outbound tourism.

Table 2.2 Top 20 Chinese cities in outbound tourism expenditure, 2018 (USD)

Ranking	City	Expenditure per capita
1	Changchun	993
2	Shenyang	964
3	Beijing	933
4	Whenzhou	929
5	Dalian	927
6	Harbin	925
7	Shanghai	923
8	Xiamen	917
9	Suzhou	912
10	Qingdao	888
11	Shijiazhuang	858
12	Taiyuan	828
13	Shenzhen	809
14	Fuzhou	799
15	Ningbo	796
16	Guangzhou	776
17	Hangzhou	766
18	Chengdu	766
19	Kunming	750
20	Nanjing	751

Source: Ctrip Group.

Chinese outbound tourists are becoming mature with increasingly diverse and individualized consumer demands

As more and more Chinese citizens travel overseas, Chinese tourists are becoming more sophisticated in terms of both their consumption concept and attitude to travel. With increasingly diverse travel demands, more Chinese tourists start to choose various in-depth and experiential tours. The boom in blind shopping tours is waning. Chinese tourists prefer more diverse and themed outbound travel products. They are gradually switching from sightseeing and shopping tours, which they have tended to choose for their initial overseas trips, to in-depth tours that bring them authentic, inspired and personalized travel experience. Chinese outbound tourists will spend a significantly higher proportion of their budgets in dining, accommodation, local recreational and entertainment activities.

The independent tour market grows quickly and group tourism products are more diversified to meet personalized demands

The Chinese outbound tourism market has also seen an increasing numbers of independent tourists. The Chinese fully independent traveller (FIT) market has extended to increasingly distant destinations. Tourists now are spread across South-East Asia, Europe, Africa, North and South America and even the Polar regions. According to Ctrip outbound travel data, half of outbound tourists signed up for group tours and the rest chose independent travel in 2018.[8] Residents in the third and fourth tier cities were still more dependent on group tours organized by tour operators. Family with children and elderly people were also more likely to select group tours. FITs have a higher demand for travel experience and convenience and therefore favour destinations which provide simplified visa applications and direct air connections. With the growth of FIT market, tour operators have developed diversified tourism products to meet personalized demands. Semi-FIT tour products and private group tour products which allow more flexible itinerary and activity arrangements are also favored by more Chinese tourists.[9]

Chinese millennials have become the backbone of Chinese outbound tourism

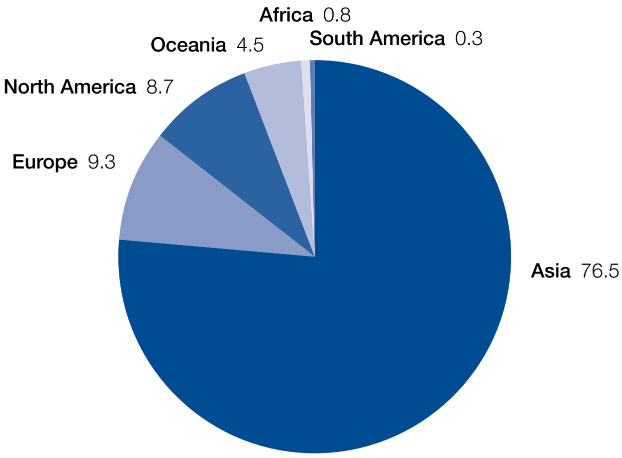
In line with their wealth and numerical strength, Chinese travellers born in the 1980s have become the backbone of Chinese outbound travel, accounting for 29% (1st place) of all outbound tourists in 2018. Travellers who were born in the 1990s have replaced those born in 1970s to take the 2nd place (18%) in outbound tourists and become one of the main forces of driving the growth of Chinese outbound tourism.[10] Chinese millennials, like others across the globe, also want to ‘experience it all’. Cutting-edge technology, exotic foods, adventurous activities and accommodation with an authentic local flavour are some of the travel styles pursued by the new generation of Chinese travellers. They want to travel farther from home and stay away longer to maximize these experiences. They are spontaneous and more likely to book their travel at the last minute. This go-getting generation takes its travel inspiration from social media, film and television but mainly draw on each other. They constantly share ideas, travel tips and quirky selfies via social media platforms such as WeChat and Weibo. Their growing sophistication and affluence is inspiring them to learn more about other cultures and to travel widely, leaving their footprints across the globe, from Latin America to Oceania and Europe to the Middle East.[11]

2.1.2 China outbound tourism to South America

With the development of national diplomatic relations and the rapid growth of China's outbound travel market, Chinese tourists have begun to turn their attention to Brazil, Argentina, Peru, Chile and other countries in South America. According to Ctrip, the largest online travel agency in China, its booking data for outbound group and FIT tourism revealed that in 2018 both Argentina and Brazil were ranked among the top 10 destinations with fastest growth in the number of Chinese tourists.[12]

As an emerging destination, South America still accounts for a very small share of Chinese outbound visits. As compared with other long-haul destinations such as Europe and North America, South America is a niche market with longer travel time and relatively higher travel costs. As indicated in the *Sino-Europe Tourism Statistics Report 2017,* Chinese outbound departures to South America, based on first arrival destination, accounted for only 0.3% of total outbound visits, ranking the last among destination regions.[13]

Figure 2.2 Chinese outbound departures, based on first arrival destination, 2017 (%, share)



Source: China Tourism Academy, Ctrip Group.

Most South American destinations have seen an increase in Chinese arrivals in the last decade.

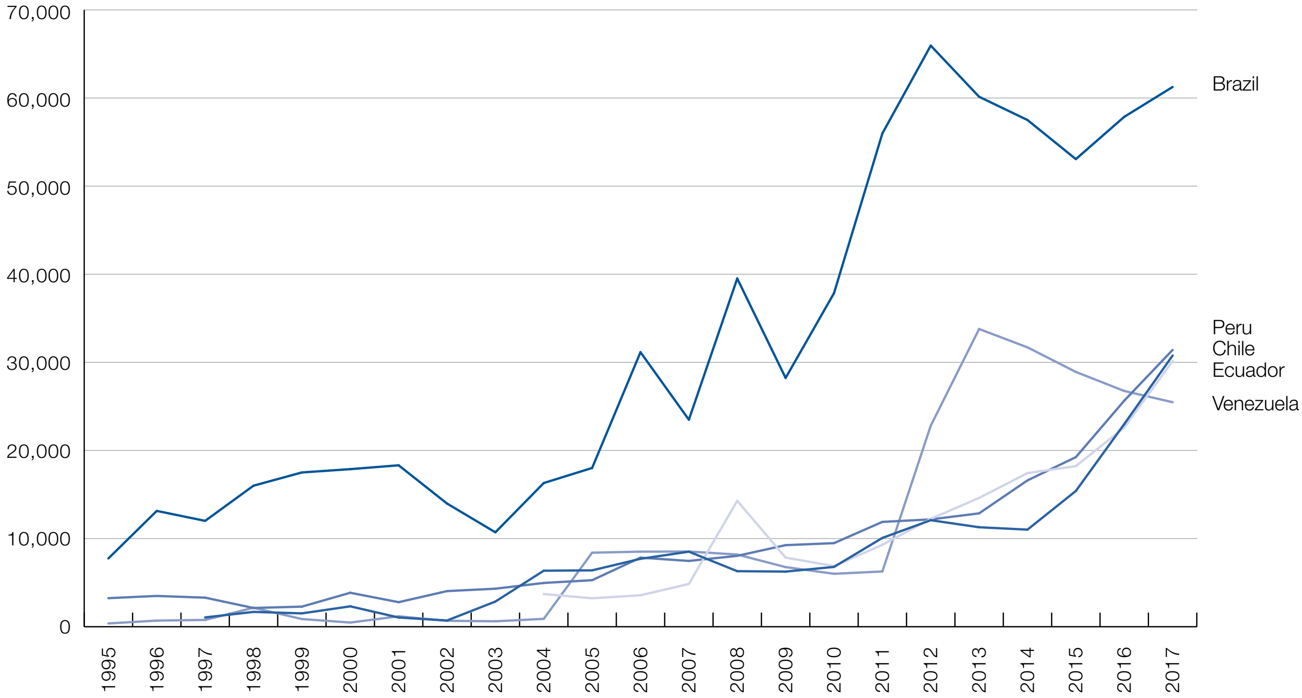
Table 2.3 International tourist arrivals from China as reported by countries of destination

	International tourist arrivals								Change (%)		Av. annual growth (%)
	Series	1995	2000	2005	2010	2015	2016	2017	16/15	17/16	10-17
Argentina	TFR	..	..	..	..	..	53.197	60.037	..	12,9	..
Brazil	TFR	7.749	17.881	18.017	37.849	53.064	57.86	61.25	9,0	5,9	7,1
Chile	TFN	187,0	2.314	6.397	6.787	15.404	22.992	30.774	49,3	33,8	24,1
Colombia	TFR	..	..	..	3.378	11.637	13.28	14.493	14,1	9,1	23,1
Ecuador	VFN	..	..	3.229	6.879	18.224	22.598	30.147	24,0	33,4	23,5
Guyana	TFR	196	..	..	..	..	..	..	..	..	..
Paraguay	TFN	..	..	598	193	1.052	820	638	-22,1	-22,2	18,6
Peru	TFR	3.241	3.854	5.279	9.484	19.243	25.648	31.408	33,3	22,5	18,7
Suriname	TFR	3.914	1.56	..	1.98	2.319	3.534	5.511	52,4	55,9	15,7
Venezuela	TFN	371	474	8.403	6.006	28.915	26.754	25.477	-7,5	-4,8	22,9

Key: TFN: Arrivals of non-resident tourists at national borders, by nationality.
TFR: Arrivals of non-resident tourists at national borders, by country of residence.
VFN: Arrivals of non-resident visitors at national borders, by nationality.

Source: World Tourism Organization (UNWTO).

Figure 2.3 Chinese tourists arrivals in selected South American countries

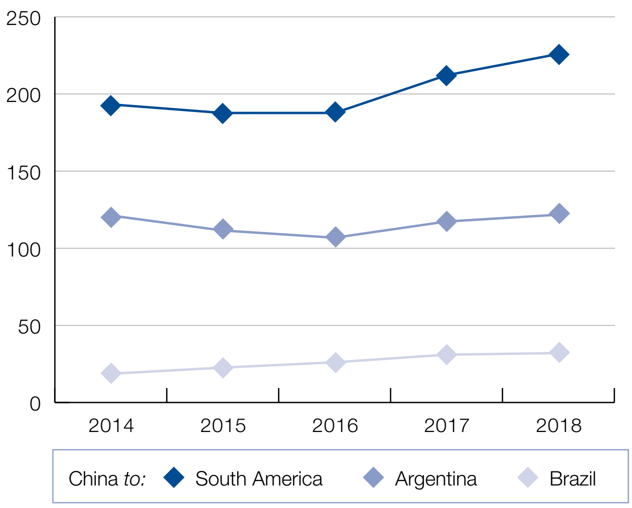


Note: Data for Argentina are shown in table 2.3 and figure 2.8.

Source: World Tourism Organization.

According to data from Amadeus, air passenger traffic analysed over the period 2014 to 2018 from China to South America has shown an increase in 2017 and 2018. The total air passenger traffic to South America for 2018 was 226,000. In the case of Argentina and Brazil both destinations also saw an increase in air passengers from China to 122,000 and 32,000, in 2018, respectively.

Figure 2.4 Air Passenger traffic (× 1,000)



Source: Amadeus Destination Insight.

The share of air passenger traffic to South American destinations represents less than 1% of total China outbound traffic.

Being the world's largest source market for outbound tourism, China has also become the strategic development target of South American destinations and local tourism service companies. They have stepped up marketing and promotion efforts in China, and introduced more simplified and friendlier visa policies. With more frequent outbound travel and accumulated travel experience, Chinese tourists' footprints are bound to gradually expand to the whole world. Blessed with abundant tourism resources, South American destinations are a great attraction to Chinese tourists and Chinese outbound tourism to South America has good potential for growth.

2.2 Developments in China outbound tourism to South America

Located in the western and southern hemispheres, South America is the fourth largest continent with a land area of just over 17.8 million km². South America includes twelve countries (Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, Guyana, Paraguay, Peru, Suriname, Uruguay and Venezuela) plus the French Guyana. Geographically, South America is very far from China. In terms of air transportation, South American countries are the farthest off in travel distance from China, often requiring more than 25 hours of flight time. Along with the development and expansion of the Chinese outbound travel market and the increase in tourist travel experience, Chinese tourists have begun to turn their attention to South American. For the overall situation and development characteristics of Chinese outbound tourism to South America, the latest market trends and existing problems revealed through the survey of ten Chinese outbound tour operators specializing in South American tourism noteworthy.[14] In the following sections, a more specific analysis of Chinese outbound tourism to South America from such aspects as tourism polices, air connectivity, marketing and promotion as well as product characteristics is undertaken.

2.2.1 Tourism policies

China has adopted a selective approach to the liberalization of overseas leisure travel.[15] In the early phase of China's reform and opening up, China focussed on the development of inbound tourism. The scale of domestic tourism was small, and outbound tourism was highly regulated. From 1983 to 1997, Chinese outbound tourism was at a preliminary development stage represented by 'family visit' to Hong Kong (China) and Macao (China), as well as some border tours. China has gradually relaxed its outbound travel policy in keeping with increasing disposable income of residents and stronger demand for outbound travel.[16] China introduced and formalized the Approved Destination Status (ADS) programme in 1990s, which allows approved destinations to market group leisure tours in mainland China and Chinese nationals to travel on group tours to an ADS country. Since then, a total of 150 international destinations have entered into bilateral tourism arrangements with the Chinese Government under the scheme.[17] So far, 130 international destinations have launched comprehensive outbound travel services for Chinese citizens.[18]

At the beginning of 2017, the State Council of China issued *China's Tourism Development Plan in the 13th Five-Year Plan,* which called for the orderly development of outbound tourism. In the Plan, some detailed objectives and tasks were laid down to ensure the healthy development of the Chinese outbound tourism market. According to the Plan, destination countries and regions for outbound tourism were encouraged to simplify visa procedures, shorten visa application time, and expand the scope of short-term visa exemption and port visas. To provide Chinese TV broadcasting and other Chinese media accessibility, improve Chinese-language reception environment, provide security measures for Chinese citizens and protect legitimate rights and interests of Chinese tourists were some of the tasks to be incorporated into the management system of inbound tourist destinations to welcome Chinese citizens. The Plan also set up goals to improve the outbound tourism service guarantee system and promote the establishment of an early warning mechanism for tourism safety and a cooperative mechanism for emergency response with relevant countries and regions. China was also encouraged to strengthen cooperation with countries with whom China has cordial relations in the exchange of visitors and carry out 'Belt and Road Initiatives' (BRI) and expand tourism exchanges with strategic partner countries. China is preparing to formulate and implement the National Tourism Assistance Programme to provide BRI partner countries and some developing countries and regions with assistance on tourism investment, brand management, technology, service standards and so on.[19]

South American countries also attach great importance to tourism cooperation and exchanges with China. Most South American countries have already reached a bilateral tourism cooperation agreement with China under the ADS framework, becoming an official inbound tourism destination for Chinese citizen's group travel organized by Chinese tour operators. Qualified local travel agencies and tourism service providers can receive Chinese group tourists and provide various services.[20]

Table 2.4 List of South American counties with Approved Destination Status, 2019

Country	Open year	Scope of outbound tour operation
Argentina	2007	Nationwide
Brazil	2005	Nationwide
Chile	2005	Nationwide
Colombia	2012	Nationwide
Ecuador	2009	Nationwide
Guyana	2009	Nationwide
Peru	2005	Nationwide
Uruguay	2017	Nationwide
Venezuela	2007	Nationwide

Note: Bolivia, Suriname and Paraguay are not listed as ADS destinations

Source: Ministry of Culture and Tourism of The People's Republic of China (2019), 已正式开展组团业务的出境旅游目的地国家（地区）(List of Countries of Approved Destination Status) (online), available at: http://zt.mct.gov.cn/cjyzl/gltl/201507/U020180724606008331724.jpg (12-09-2019).

In recent years, with the rapid growth of Chinese outbound tourism, many South American countries have paid more importance to the development of Chinese outbound tourism market and made efforts to attract more Chinese tourists through such measures as enhancing promotion in China, providing Chinese language services, studying the characteristics of Chinese tourists, and understanding the needs of Chinese tourists.[21]

To boost tourism from China, several South American countries have simplified application procedure for visa. In 2015, Chile launched a new visa policy that certain Chinese tourists and business travellers no longer need a separate visa to visit Chile if they have visas for the United States of America or Canada with more than six-month validity.[22] Argentina took the similar measure in 2016 by implementing Electronic Travel Authorization

Table 2.5 South American countries tourism visa policies for Chinese citizens

Country	Tourist visa policies
Argentina	Chinese tourists do not need a visa if they hold a current category B2 visa issued by the United States of America or a category C visa issued by one of the Schengen States. They still need to obtain the Electronic Travel Authorization (AVE) for the entry to Argentina.
Bolivia	Consular visa required for Chinese tourists. Source: Embassy of Bolivia in China (online), available at: www.embolchina.cn/index.php/English.
Brazil	Visa required for Chinese tourists.
Chile	Chinese tourists do not need a visa to enter Chile if they hold a visa from the United States of America or Canada with a minimum validity of six months at the time of entering Chile. Otherwise, a visa is required. Source: Ministry of Foreign Affairs of China (2015), 中国和智利便利人员往来互惠安排即将生效 (online), available at: http://cs.mfa.gov.cn/zggmcg/ljmdd/nmz_657827/zl_658573/fwxx/t1275440.shtml.
Colombia	Chinese tourists do not need a visa to enter Colombia if they hold a visa from the United States of America or from a Schengen State with a minimum validity of 180 days at the time of entering Colombia. Otherwise, a visa is required. Source: Ministry of Foreign Affairs of Colombia (online), available at: www.cancilleria.gov.co.
Ecuador	Chinese citizen holding valid ordinary passports are exempt of visa for the purpose of tourism. From the date of first entry to the date of final departure, the cumulative stay does not exceed 90 days in one year. Source: Ministry of Foreign Affairs of China (online), available at: cs.mfa.gov.cn.
Guyana	Consular visa required for Chinese tourists. Source: Embassy of Guyana in China (online), available at: www.guyanaembassybeijing.cn.
Paraguay	Paraguay has not established diplomatic relations with China.
Peru	Chinese tourists do not need a visa to enter Peru if they hold a valid visa issued by Schengen States, the United Kingdom, the United States of America, Canada or Australia. Source: Peru Tourism Bureau (online), available at: www.perutravel.cn.
Suriname	Chinese citizens travelling to Suriname for tourism purpose can apply for tourist cards at entry ports without applying for visas in advance. The tourist card is valid for one entry, with a stay period of 90 days and cannot be extended. Source: Embassy of Suriname in China (online), available at: www.surinameembassy.cn.
Uruguay	Chinese tourists do not need a consular visa on their passport if they hold visas for the United States of Americ a, the United Kingdom, Australia, New Zealand, Canada or Schengen area. Source: National Immigration Service of Uruguay (online), available at: https://migracion.minterior.gub.uy.
Venezuela	Consular visa required for Chinese tourists.

(AVE) – an e-travel permit to simplify the visa procedures for eligible Chinese tourists.[23] Peru and Colombia have also introduced the similar policy to allow Chinese tourists entering Peru and Colombia without visas if they meet certain criteria.

2.2.2 Air connectivity

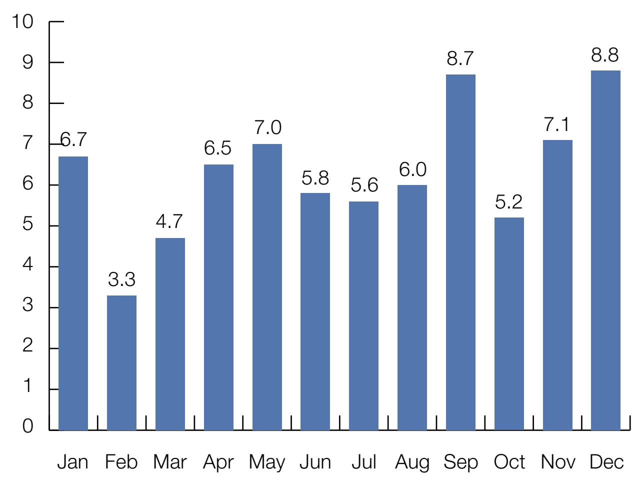
The rapid growth of Chinese outbound tourism market has also benefited from the sustainable development of China's air transport industry and the continuous expansion of the air transport network. Growth in outbound travel has been achieved with the increasing air transport capacity, the adding of international routes, the opening of international direct flights as well as the continuous improvement of infrastructure such as airports. The expansion of air transport network has also explored the potential of a wider range of source regions in China. By the end of 2018, China had signed bilateral air transport agreements with 126 countries or regions, including 44 in Asia, 27 in Africa, 37 in Europe, 11 in the Americas and 7 in Oceania. 849 international routes have been opened, and passenger traffic on international routes has reached around 64 million – an increase of 15% over 2017. 235 airports have been built for passenger and cargo transportation.[24] In addition to the hundreds of international routes operated by Chinese airlines, there are 135 foreign airlines operating hundreds of international routes connecting more than 50 cities in China.[25] The expansion of the international air transport network and the increase in international air transport capacity have met the growth demand of Chinese outbound tourism, and made it possible for Chinese tourists to visit more international tourist destinations.

For 2019, according to estimates, Chinese outbound tourists have the choice of travelling from China to the world on 513,000 direct international flights, a year-on-year increase of 4%, and have a capacity of 108 million available seats, a year-on-year increase of 5%.[26]

Unfortunately none of these flights or available seats is directed to South America. Due to limitation on aircraft technology, there is no direct flight between China and South American countries. Flights need to make a stopover or transit at a third country. The flight time often exceeds 25 hours. In 2018, a total of 225,900 air passengers are estimated to have travelled from China to South America; all passengers had to make at least one connection, with 66% making one connection and 34% making two connections. The majority (87%) travelled in economy whilst 13% in premium cabins (business and first class). Although in 2019 South America is connected by 326,000 direct international flights with 60.4 million available seats from the world, however, none are with China.[27]

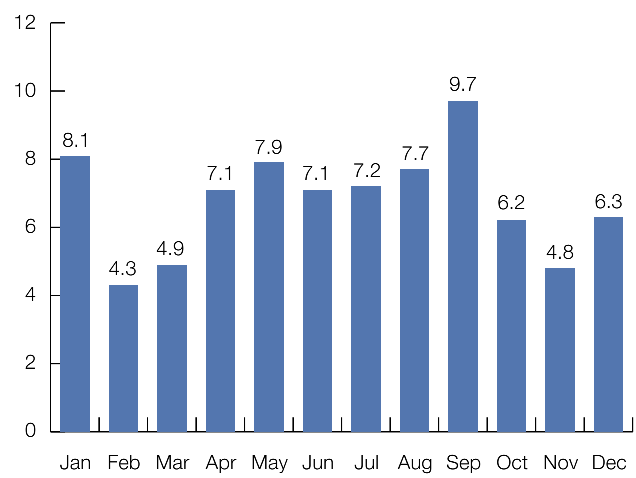
The APEC Project TWG 01 2014A[28] to Develop Air Connectivity in the APEC region published in 2016 concluded that aircraft technology is still one of the biggest hurdles to connect APEC economies. After analysing a

Figure 2.5 Estimated increase in the number of direct international flights from China to the world, 2019 (%)



Source: Amadeus Destination Insight

Figure 2.6 Estimated increase in available seats on direct international flights from China to the world, 2019 (%)



Source: Amadeus Destination Insight

total of 18,500 routes, 82 potential new flight routes were identified and recommended for APEC region. However, the report also identified that 47 economy pairs (22%) that cannot be connected due to physical distance even with the latest aircraft technology. Unfortunately, none of the new flight recommendations were for China and South America.[29]

Air connectivity is a hurdle to the development of tourism between China and South America, with direct flights challenged by limitations of aircraft technology. However, with initiatives like Australia's airline QANTAS 'project sunrise'[30] that is challenging the world's aircraft manufacturers to develop an aircraft that can fly non-stop Sydney to London and Sydney to New York, may be a catalyst for future non-stop flight connectivity between China and South America.

2.2.3 Marketing and promotion

In recent years, the rapid development of the Chinese outbound tourism market led many destination countries and regions worldwide to tailor their market development and marketing strategies to China, hoping to further tap the potential of the Chinese outbound tourism market and attract more Chinese tourists. The development scale of Chinese outbound tourism has also attracted the attention of South American countries, and many South American destinations have stepped up their marketing and promotion efforts targeting the Chinese market. According to information from Chinese tour operators, Chinese tourists had a rather general understanding of South America, and their impressions of South American destinations were vague and limited. For many Chinese tourists, the reference to South America is through sports such as football and its rich culture. As South American tourism products are being publicized and promoted in China, South American tourism resources become more meaningful and better appreciated. The diversity of South American destinations, unique natural landscapes and world cultural heritage sites are important elements that attract Chinese tourists.

In terms of destination marketing, many South American countries have chosen to cooperate with local Chinese companies to carry out destination publicity and promotion via multiple channels. A few South American destinations promote tourism resources and products to Chinese tourists by setting up Chinese websites and opening Chinese social media accounts.

For example, the Argentina National Institute of Tourism Promotion (INPROTUR) has launched a Chinese website (http://travelargentina.cn/) which not only introduces Argentina's history, culture, customs and major tourist attractions, but also brings theme experience activities such as urban culture, outdoor adventure, food and wine, natural scenery and festival activities. Tourism resources and tour itinerary products are integrated to meet the needs of tourists for different tourism themes and experiences. INPROTUR is dedicated to conveying the characteristics of tourism resources, tourism destination image and market positioning of Argentina to potential Chinese tourists through such marketing themes as 'fashion capital', 'fanatical football', 'passionate tango', 'mellow wine' and 'glacier at the end of the world'.[31] In addition to the Chinese website, INPROTUR has opened a Weibo account and a WeChat public account to share Argentina's tourism assets with Chinese tourists, in order to attract more Chinese tourists to Argentina. The Peru Export and Tourism Promotion Board (PROMPERU), the Chile National Tourism Service and the Colombia Trade Promotion Agency (ProColombia) have also publicized the tourism resources of their destinations to Chinese tourists and promote tourist routes and products via official Chinese websites or official social media accounts, so that Chinese tourists can have a deeper understanding of their tourism resources.

In addition to online marketing channels such as websites and social media, South American countries have engaged in face-to-face communication and negotiation with Chinese travel agencies by participating in tourism exhibitions and carrying out road shows. They have promoted their major tourist routes and destinations through travel agency partners and distribution channels in China. In May 2018, the Brazilian Institute of Tourism (Embratur) presented a replica of Brazil to visitors at the ITB China held in Shanghai with cultural performances featuring different regions and refreshing Caipirinha cocktails. Embratur also introduced Brazil's ecotourism resources, famous natural heritage, carnivals and diversified tourism experience to its Chinese counterparts.[32] Besides, Brazil worked with the Argentina National Institute of Tourism Promotion to introduce and promote tourism resources and selected scenic spots of Brazil and Argentina through road shows in major Chinese tourist source cities such as Beijing, Shanghai, Guangzhou and Hong Kong (China). Around 600 representatives from Chinese travel trade took part in the road shows and met with Brazilian and Argentine counterparts for business exchange.[33]

While carrying out offline cooperation with Chinese tour operators, a few South American countries have begun to

seek online tourism promotion and distribution channels. In November 2018, the Chile National Tourism Service signed a strategic cooperation agreement with Ctrip Group, China's leading online travel service provider. The two sides have cooperated in tourism destination promotion, tourism product development and destination marketing. Ctrip, relying on its advantages in big data, distribution platform and members, has provided Chile with precision marketing and one-stop integrated marketing solutions by means of full-scene marketing that covers the full range of channels and products. Peru has also established a flagship store of Peruvian tourism destinations on Ctrip's online tourism service platform, introducing and promoting Peru from various aspects including scenic spots, shopping, food, itinerary, travel notes and strategies.[34]

2.2.4 Destinations and tour products

At present, Chinese outbound tourism routes and products to South America have covered most South American destination countries: Argentina, Bolivia, Brazil, Chile, Colombia, Ecuador, French Guiana, Guyana, Peru, Suriname and Uruguay. According to the survey of ten Chinese tour operators, Argentina, Brazil, Chile and Peru are the most popular countries and most attractive to Chinese tourists. They are also usually the preferred choice for Chinese tourists who travel to South America for the first time. Due to long-distance flights, Chinese tourists visiting South America are more interested in experiencing the different cultures in South America. Therefore, the tourist routes and tourism products connecting multiple destination countries are popular, especially the multi-destination tour itineraries to visit Argentina, Brazil, Chile and Peru, which are among the best sellers.

The average tour itinerary is 16 to 21 days, including visits to main tourist cities and the most famous tourist attractions in the destination countries. The four-country connecting tour includes visits to Buenos Aires, Ushuaia, Tierra del Fuego and Great Glacier in Argentina; São Paulo, Manaus, Rio de Janeiro, Iguazu Falls and the Amazon River in Brazil; Santiago and Easter Island in Chile; and Lima, Cuzco, Urubamba and Machu Picchu Remains in Peru. In addition to the combined tours to the four South American countries, the shorter combined tours to Brazil and Argentina, Chile and Peru, and Peru and Bolivia are also popular tour products.

In recent years, Antarctic tourism has attracted greater attention of the Chinese tourists. The number of Chinese tourists to Antarctica has been increasing year by year, so China has become the second largest source of tourists to Antarctica in the world. Ctrip has predicted that the number of Chinese tourists visiting Antarctica during the 2018/2019 Antarctic tourism season will exceed 10,000.[35] With the growing demand for Antarctic tourism, South America plus Antarctic tourism products are welcomed and continue to sell well. Chinese tour operators have offered different combined tourist routes to South America and Antarctica to meet the needs of tourists at different levels of consumption. Additionally, Chinese tour operators have diversified the choice of tourist routes to South America by organizing combined tours to six or seven countries in Central America and South America, which meet the needs of Chinese tourists who have sufficient holidays and wish to visit several countries at a time.

Bolivia, Colombia, Guyana and Suriname, and other less known destination in Central America and South America profit from such multi-country combined tours. Most Chinese tourists wish to visit more countries and famous scenic spots due to the long distance, so South American tourism is dominated by multi-country combined tours which will develop to higher-quality in-depth tours and experience tours in the future. Accordingly, there will be higher demand and requirements for the development of destination tourism resources, innovation in tourism products, and improvement in tourism facilities and services.

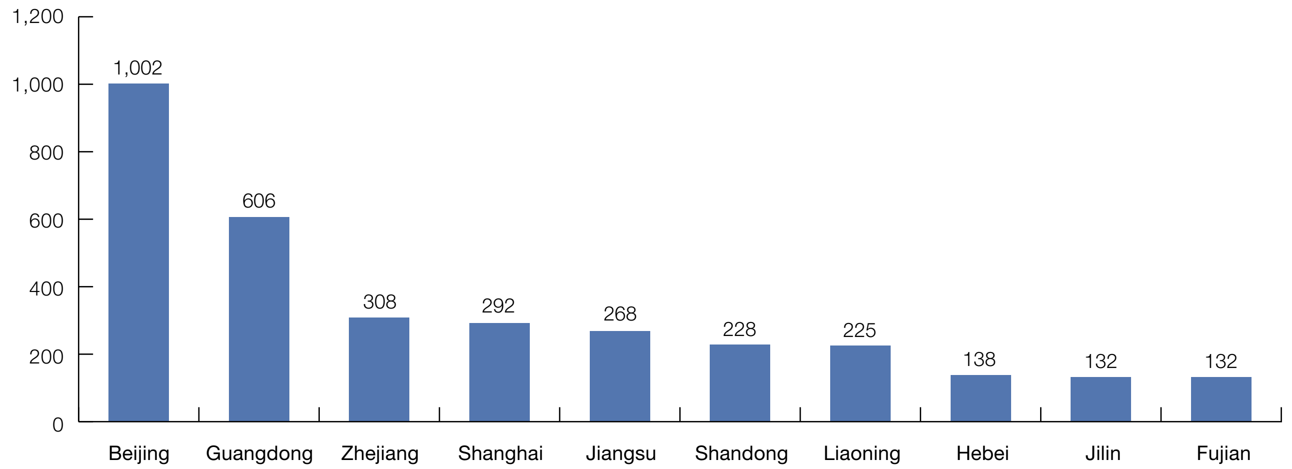
2.2.5 Main tour operators and travel channels

The Chinese outbound tourism market is marked by vertical integration where the wholesale and retail distribution system which consists of major stakeholders such as tourism wholesalers, large-scale full service travel agencies, retail travel agents and online travel agencies play an active role. Chinese outbound tourism wholesalers are outbound tour operators, mainly engaged in packaged tourism products. They are mainly responsible for consolidating different supplier services and local resources such as air tickets, hotels, handling visa application, arranging tour leaders and guides, and organizing outbound tourism activities. Their businesses usually extend to the whole country with retail distribution through small and medium-sized travel agencies in various regions. Large-scale full service travel agencies are those travel service enterprises which provide comprehensive travel services including inbound tourism, outbound tourism, domestic tourism, air ticket agency, etc., and have strong names and operate in different regional source markets. In terms of their operations in outbound tourism, they design outbound tourism products and serve customers directly through their own distribution channels. With the rapid development of information technology, online travel agencies have also emerged and consolidated businesses of traditional travel agencies by providing comprehensive travel services including accommodation reservation, transportation ticketing, packaged tours, local tours, local activities, etc., through online platform.

As of April 2019, the number of officially licensed travel agencies was 4,907. They are mainly distributed in Beijing, Shanghai, Guangdong and other first-tier cities and regions.[36]

As an emerging market, outbound tourism to South America accounts for a relatively small share of the China outbound travel market. In addition to some large-scale outbound tourism wholesalers and comprehensive service providers operating tours to South America, there are also some smaller travel agencies mainly engaged in South American tourism business. These tour operators are concentrated in port cities such as Beijing, Shanghai and Guangzhou, mainly serving affluent customers with relatively rich travelling experience. Some of these major outbound tour operators are outlined below.

Figure 2.7 Geographical distribution of Chinese travel agencies organizing outbound travel by number



Source: Ministry of Culture and Tourism of China.

Table 2.6 Major Chinese tour operators

UTour Group: www.uzai.com	
General information	Founded in 1992, the company is one of the biggest outbound tour operators in China. In 2018, the total revenue of UTour Group has reached CNY 122.3 billion (approx. USD 1.8 billion). The outbound wholesale business revenue accounted for 71% of total outbound travel revenue:
Business and product	The company mainly engages in outbound travel wholesale, retail, and incentive, business travel and meetings. It provides a comprehensive product line system that covers Europe, Australia and New Zealand, Africa, the Middle East, the Americas, Asia, domestic and international cruises.
Operation network	The company has six branches in Shanghai, Chengdu, Shenyang, Harbin, Xi'an, and Wuhan. It has more than 2,000 B2B trade partners and over 435 retail outlets across country.
Outbound tourism operation to South America	The company operates a portfolios of packaged tours to South America, including mainly the four-country connected tours to Brazil, Argentina, Peru and Chile, multi-destination tours to several central and South American countries and in-depth two- country tours to Peru and Chile or Brazil and Argentina.
Guangzhilv International Travel Service Ltd.: www.gzl.com.cn	
General information	Headquartered in Guangzhou, the company is a leading state-owned travel agency in southern China. In 2018, the number of outbound tourists organized by the company reached over 70 million.
Business and product	Company mainly engages in outbound and domestic tourism, inbound tourism and other services, as well as international and domestic air ticketing, development and management of scenic attractions, exhibition services etc.
Operation network	The company has branch offices in Malaysia, Hong Kong (China), Macao (China), Beijing, Yunnan, Sichuan, Xinjiang and others. It has established the most intensive sales and distribution network in south China with over 400 retail outlets in Pearl River Delta.
Outbound tourism operation to South America	The company mainly operates multi-destination combined sightseeing tours and customized tours to South America. The most featured product is five-country connected panoramic tour to Argentina, Brazil, Chile, Peru and Uruguay.
China International Travel Service Limited, Head Office (CITS): www.cits.cn	
General information	The company is a subsidiary of CITS Group Corporation. It is among the first batch of travel agencies to obtain special license to operate outbound tourism for Chinese citizen. Established in 1954, the company has developed into a large-scale tourism enterprise providing comprehensive travel and tourism services.
Business and product	The Company mainly engages in inbound travel, outbound travel, domestic travel, MICE travel, visa service, business travel service, aviation service, e-commerce and other comprehensive services.
Operation network	The company owns a national network with over 1800 retail outlets across the whole country. It has also maintained cooperative relationship with over 1,400 travel agencies in more than 100 countries around the world, with six offshore subsidiaries in overseas countries and regions.
Outbound tourism operation to South America	The main product offerings include multi-destination combined sightseeing tours to South America as well as South America plus Antarctic tourism products. They also sell tourism products to South America destinations operated by other travel agencies.
China CYTS Tours Holding Co., Ltd. – CYTS: www.aoyou.com	
General information	The company was founded in 1980 and headquartered in Beijing, China. As one of the top tour operators in china. It serves 1.5 million tourists annually.
Business and product	The company's business operations include inbound travel, domestic travel, outbound travel, conferences and exhibitions, travel management, scenic area development, hotel management, as well as technical support, travel-affiliated resources development and online information services.
Operation network	The company has set up branch offices in over 30 major domestic and international destination cities including Beijing, Shanghai, Guangzhou, Tianjin, Nanjing, Hangzhou, Shenzhen, Tokyo, Vancouver, Hong Kong (China), among others. It provides booking services for tour packages and holiday services covering more than 100 countries and regions around the world.
Outbound tourism operation to South America	The tourism products offered mainly include multi-destination combined sightseeing tours to South America and as well as distributing tourism products to South America destinations operated by other travel agencies.

Beijing TXJ International Travel Service Co., Ltd: www.lameitour.com	
General information	The company and its travel brand *Lamei Tour* is a professional tour operator specializing in organizing tours to Latin America and polar region. With strong product design and development capability, it is highly recognized by customers in the industry.
Business and product	The company is a leading wholesaler and operator in outbound tourism to South America, with tourism product and service portfolios covering Argentina, Bolivia, Brazil, Chile, Colombia, Peru, Uruguay, Venezuela, North and South Pole and many Latin American destinations.
Operation network	The company provides wholesale services to other peer travel agencies or travel service companies and has become contracted supplier to many leading Chinese travel services companies and large online travel agencies.
Outbound tourism operation to South America	The company operates a series of outbound tours to South American, from sightseeing tours to in-depth exploration. In 2018, the number of Chinese outbound tourists to South America organized by the company is about 3,800.

Shanghai Youpai International Travel Service Co., Ltd.: www.upie.com	
General information	The company was founded in Shanghai in September 2002 and officially established the *Youpai Travel* brand in October 2016. It is recognized as one of the leading wholesalers in outbound tourism to Latin American market. The number of outbound tourists organized in 2018 is over 60,000.
Business and product	The company specializes in the provision of wholesale business in Africa, the Middle East, the Americas, Europe, Central Asia and Polar tourism products to the peer companies.
Operation network	Headquartered in Shanghai, the company has also set up branch offices in Guangzhou, Shenzhen, Wuhan, Zhengzhou and Chengdu.
Outbound tourism operation to South America	The tourism products offered mainly include multi-destination combined sightseeing tours to South America and the Antarctic. In 2018, the number of Chinese outbound tourists organized for visits to South America is over 2000.

Dinghong Tour International Travel Service Co., Ltd: www.dinghongtour.com	
General information	The company was originally formed as an inbound operator in Brazil to receive Chinese visitors. By setting up office in Beijing in 2003, the company has developed into a comprehensive travel service provider specializing in local reception and outbound wholesale business in South America.
Business and product	The company specializes in organizing official or business visits, investment and trade consulting, exhibition, sightseeing tourism, exploration, sports, leisure and vacation, overseas study etc.
Operation network	It has offices in Beijing, Shanghai and Guangzhou. Its flagship companies are all around the world in Rio de Janeiro, Sao Paulo, Lima, Mexico City, Cancun, Santiago and Buenos Aries, among others.
Outbound tourism operation to South America	In 2018, the company organized about 4,000 Chinese visitors to South America for leisure or business travel.

In addition to promoting and selling tourism products through cooperation with local retailers, the outbound tour operators also have online distribution networks, including company-operated e-commerce sites and mobile applications. At the same time, they also work with major Chinese online travel service companies to expand sales channels and reach more visitors. According to China Internet Network Information Center, as of December 2018, China's Internet users reached 829 million. The Internet penetration rate reached 60%. Over the past few years, rapid mobile adoption has dramatically altered the Internet landscape in China. The number of mobile Internet users in China reached 817 million by December 2018. The prevalence of Internet has also led to the quick expansion of online booking for travel related products or services. As of December 2018, the number of users of online travel booking has reached 41 million with penetrating rate at 50%.[37] Ctrip.com International Ltd., Tuniu Corporation and Tongcheng Network Technology (LY.com) are the most important online platforms for distributing outbound tour packages and services in China.

Table 2.7 Online travel agencies providing outbound tour packages

Ctrip.com International Ltd.: www.ctrip.com	
General information	Founded in 1999, the company is the largest online travel service provider in China. It is currently the second largest online travel service company in the world by market capitalization.
Business and product	The company provides vacation packages and guided tour booking, covering most popular travel destinations around the world. It also provides independent leisure travellers with bundled packaged-tour products comprising semi-group tours, private tours or packaged tours with various transportation arrangements.
Operation network	The company has established branches in 95 domestic cities such as Beijing, Guangzhou, Shenzhen, Chengdu and Hangzhou, 22 overseas cities such as Singapore and Seoul and service liaison centres in Nantong (China) and Edinburgh (Scotland).
Outbound tourism operation to South America	The company sells over 300 different tour products to South America on its distribution platform, including group tour packages and destination local tours. Many tour operators in outbound travel to South America have chosen to distribute their tour product through Ctrip online platform.
Tuniu Corporation: www.tuniu.com	
General information	Tuniu is a leading online leisure travel company in China that offers a large selection of packaged tours, including organized and self-guided tours, as well as travel-related services for leisure travellers through its website and mobile platform.
Business and product	By the end of 2018, the company has partnered with more than 16,500 travel service suppliers or providers and offered over 2.2 million packaged tour products, as well as a wealth of services including air ticketing, hotel reservation and visa services.
Operation network	The company provides one-stop leisure travel solutions through its online platform and offline service network, including call centres, regional service centres and international centres.
Outbound tourism operation to South America	The company sells over hundreds of different tour products to South America on its distribution platform, including group tour packages and destination local tours. Major operators in outbound travel to South America have chosen to distribute their tour product through Tuniu online platform.
Tongcheng Network Technology (LY.com): www.ly.com	
General information	Established in 2004, the company is a leading online leisure travel service provider. It has been nominated among the top 20 Chinese Tourism Groups for several consecutive years. The company provides comprehensive travel services and one-stop shopping through its online platform and mobile application, including leisure tours, tickets for scenic attractions, hotel booking, domestic and international air tickets, cruises, etc.
Outbound tourism operation to South America	The company sells several multi-country connection tours to South America and couple of local tours in Rio de Janeiro.

2.2.6 Challenges and opportunities

South America which has rich tourism resources, combining nature and culture and numerous destination choices has attracted more Chinese travellers and has a promising future for market development.

However, the development and growth of Chinese outbound tourism to South America is also facing difficulties and challenges. Due to the limitation of aircraft technology, there is no direct flight connecting China to South America. The long flight time with transfers, usually taking more than 20 hours one way, is one of the main handicaps to travel to South America. Travelling in South America is also heavily dependent on flights between countries, as well as between major attractions within a country, making the overall journey time-consuming and arduous. The high cost of travel to South America is another factor affecting the growth of Chinese outbound tourism to South America. The cost of regular sightseeing tours to South America is generally more than CNY 40,000–50,000 (USD 5,700–7,200) per tourist, which is twice that of regular tour products to Europe and North America.

According to the feedback of Chinese tour operators, the tourists travelling to South America mainly come from traditional first-tier cities such as Beijing, Shanghai, Guangzhou and Shenzhen where residents have higher income and stronger consumption capacity. For the

second- and third-tier Chinese cities with relatively low consumption capacity, tourists' demand for South American tourism is not high.

Longer vacation and free time required for travelling to South America is also dissuasive for Chinese tourists to visit South American destinations. Therefore, the main consumers of outbound tourism to South America are retirees born in the 1950s and the 1960s who have free time and long vacations. Multi-country combined tours can meet their needs. In addition, safety and security issues in some South American destinations are the inhibiting factors influencing travel to South America as a destination. Language barriers also limit the growth of Chinese independent travellers to some extent.

Major features and characteristics of Chinese outbound travel to South America

Tourist origin: mainly first-tier cities such as Beijing, Shanghai, Guangzhou and Shenzhen.

Cost of tour: CNY 40,000–50,000 (USD 5,700–7,200), twice higher than the cost of regular tour to Europe and North America

Demographical profile: main consumers are those born in the 1950s and 1960s with more free time or longer vacations. Chinese middle class and high net worth individuals account for the majority of tourists to South America.

Product: most popular and welcomed products are multi-destination connected tours

As an emerging destination, South America has a great attraction for Chinese tourists. It is appealing to those seasoned Chinese tourists who wish to seek unique and fresh tourism experiences in travelling to South America. A majority of tourists to South America are Chinese middle class and high net worth individuals. They are less sensitive to price, prefer high-quality travel services and experiences, and are willing to pay for high-quality services and products. It offers great business opportunities for South American destinations to tap the consumption potential of these Chinese tourists to boost tourism revenue.

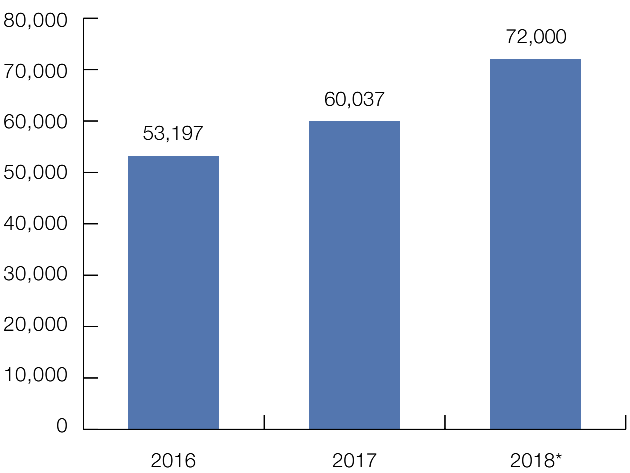
2.3 China outbound tourism to Argentina

2.3.1 Analysis of Chinese outbound tourism to Argentina

Argentina is the second largest country in Latin America after Brazil. Argentina's landscape is rich and varied with tropical rain forests and deserts, mountains and valleys along the continent's Andes range, running west to the Pampas Steppe and Atlantic coast. The biodiversity of the ecosystem endows Argentina with a very rich fauna and flora. Argentina is equally rich in cultural resources, both tangible and intangible centred around international metropolises like Buenos Aires where the tango bars are as common as the cafes in Paris. Argentina is also nation that prides itself in its sporting prowess, not only in football but other sports as well, with iconic figures having given the country a wide reputation.

Under the framework of ADS, Argentina became a destination country for Chinese citizens' group tours as early as in 2007. Many of Argentina's national culture and local products have become familiar to Chinese tourists. Tango dancing, famous football teams and stars, roast meat and wine are all famous in China. Argentina is also one of the main destinations for Chinese tourists travelling to South America. The four-country combined tours including Argentina, the in-depth tours to Brazil and Argentina, and the polar tours to Argentina and Antarctica are some of the popular products. Over the past three years, the number of Chinese tourists visiting Argentina has been increasing by double-digit percentages. According to UNWTO data, the number of Chinese outbound visits to Argentina reached 53,197 in 2016 and 60,037 in 2017, representing an annual increase of 13%.[38] The number of Chinese visits to Argentina reached 72,000 in 2018, up 30% from 2016, according to the data released by the Argentine Ministry of Tourism. In the first four months of 2019, the number of Chinese tourists visiting Argentina increased by 11% compared with the same period last year, and is expected to continue the double-digit growth for the whole year.[39]

Figure 2.8 Chinese tourist arrivals in Argentina, 2016–2018



Source: Ministry of Tourism of Argentina. * Provisional data.

Currently, Chinese outbound travel to Argentina has demonstrated the following features and demographical characteristics:[40]

- Tourism seasonality: Chinese outbound tourism to Argentina shows a strong seasonal trend. Most of Chinese tourists choose to travel during its summer season.

- Age: A large proportion of Chinese tourists visiting Argentina are 30 to 44 years old and 45 to 59 years old. There is a developing trend that more young people choose to visit Argentina than in previous years when tourists to Argentina were older.

- Destinations/attractions visited: Argentina's most classic scenic spots, such as Buenos Aires, Iguazu Falls, Bariloche, the Great Glacier in Calafate, Tierra del Fuego and Ushuaia at the southern tip of South America.

Market demand

In 2018, China generated 3% of all global Amadeus searches for international travel through online travel agencies and metasearch websites. Argentina's market share of global demand in 2018 was 0.45%, and of Chinese demand 0.06%. The key cities from which the searches for Argentina originated were Shanghai (26%) and Beijing (20%), whilst the rest of China represented 54%. The main destination in Argentina was Buenos Aires (83%), whilst the rest of Argentina counted for 17%.

According to Ctrip's online bookings for group tours and independent tours, the number of tourists to Argentina increased by 166% year-on-year in 2018. Chinese tourists preferred combined tours to Argentina and South America and polar tours to Argentina and Antarctica. Chinese tourism to Antarctica has surged in recent years. As the main entrance to travel to Antarctica, Argentina enjoys an obvious geographical advantage. The combined tourism routes to Argentina and Antarctica are very popular and have become an important driver for the continuous growth of Chinese outbound tourism to Argentina.

Total air passengers

In 2018 a total of 32,038 air passengers are estimated to have travelled from China to Argentina, the majority (86%) travelled in economy class whilst 14% in premium cabins (business and first class).[41] There are no direct flights between China and Argentina. Consequently all air passengers had to connect: 65% of air passengers made one connection, and 35% air passengers made two connections. The top ten connection cities are indicated in table 2.8.

The top ten airlines that air passengers travelled on between China and Argentina in 2018 are enumerated in table 2.9.

The main source cities in China in terms of air passengers to Argentina were Shanghai (34%) and Beijing (24%), whilst the rest of China accounted for 42%. The main destination in Argentina was Buenos Aires (98%), whilst the rest of Argentina captured only 2%.

2.3.2 Visa facilitation

The growth in Chinese tourists to Argentina has benefited in part from Argentina's increased marketing and promotional campaigns targeting the Chinese market. On the other hand, improvements to Argentina's visa policy made it more convenient to travel to Argentina and also gave an impetus to Chinese tourists to visit Argentina and South America. In July 2016, Argentina introduced a new visa policy that simplified the visa procedures for eligible Chinese tourists. Chinese tourists with a Schengen Visa or a United States of America B2 visa, valid for more than three months, were able to enter Argentina visa-free by applying online and obtaining an e-travel permit – Electronic Travel Authorization (AVE).[42] Since the e-travel permit can be applied online and no interview is required, the processing time is about 20 working days regardless of the consular district. Compared with the previous requirement that all applicants must be interviewed and submit notarized, certified and Spanish-translated documents, the implementation of AVE greatly simplifies the visa application and approval process.

In June 2017, the Embassy of the Argentine Republic announced in Beijing the implementation, as of 15 June, of the ten years visa for Chinese citizens travelling to Argentina for tourism or business reasons. The new visa policy was launched to encourage more Chinese visitors to travel to Argentina, as well as enhancing the tourism sector.[43] In August 2018, Chinese citizens interested in travelling to South America received a big welcome from Argentina and Chile when the two countries made changes

Table 2.8 Leading connecting cities for Chinese outbound visitors to Argentina, 2018 (share, %)

Connection city	Air passengers
AMS – Amsterdam	27
FRA – Frankfurt	13
DOH – Doha	7
DFW– Dallas Fort Worth	7
DXB – Dubai	7
EWR – Newark	6
CDG – Paris	5
PEK – Beijing	4
LHR – London	4
IST – Istanbul	4

Source: Amadeus Traffic Analytics.

Table 2.9 Leading airlines used by Chinese passengers to Argentina, 2018 (share, %)

Airline	Air passengers
KLM	29
Lufthansa	14
American Airlines	8
United Airlines	8
Qatar Airways	7
Emirates	7
Air France	6
British Airways	4
Turkish Airlines	4
Ethiopian Airlines	4

Source: Amadeus Traffic Analytics.

to their visa policies. Beginning in January 2019, Chinese tourists would be able to get a visa allowing them to move freely between the two South American nations. The new dual visa will be for multiple entries to both countries and will be limited to 90 days. This mutual recognition visa agreement is another important step that Argentina has taken to further increase the influx of Chinese tourists in near future.[44]

2.3.3 Challenges and opportunities – policies to boost tourism cooperation between the two countries

In 2018 Argentina received 6.9 million international tourists, ranking first among South American destination countries, and its international tourism receipts reached USD 5.6 billion.[45]

Recognizing the importance of tourism development to the national economy, the government of Argentina strongly supports the tourism sector. Driven by the vision of becoming South America's tourism destination of choice, Argentina unveiled a new Tourism National Plan in 2016 with a goal to attract up to nine million international tourists by 2020. In the Plan, key international tourist source markets were identified and segmented by growth potential. Different commercial strategies and action plans were developed in order to grow businesses in priority, strategic and potential markets. China was carefully studied and identified as an emerging strong market for potential growth.[46]

Argentina hopes to further increase its share of the Chinese market. However, there are important challenges. Compared to mature destinations that have been popular in the Chinese market for many years, Argentina is less known to Chinese tourists in terms of its tourism resources and cultural background. The long distance and high cost of travel also discourage many Chinese tourists from travelling to South America. To tackle these challenges, Argentina attaches greater importance to the cooperation with China and provides continuous support and collaboration in the area of tourism.[47]

In order to prospect the Chinese outbound tourism market, Argentina has been enhancing marketing and promotion to increase the awareness of the destination among Chinese consumers. It has not only set up an official Chinese website, but also opened an official account on Weibo and a public account on WeChat, with a view to promoting Argentine tourism resources, improving Argentina's awareness among Chinese tourists, and building an attractive image of Argentina as a tourist destination through digital marketing. In addition, Argentina has, as explained earlier, actively adjusted visa policies and simplified visa applications. Argentina has engaged in discussions with China and relevant partner airlines on the possibility of direct connection from China to Argentina.

2.4 China outbound tourism to Brazil

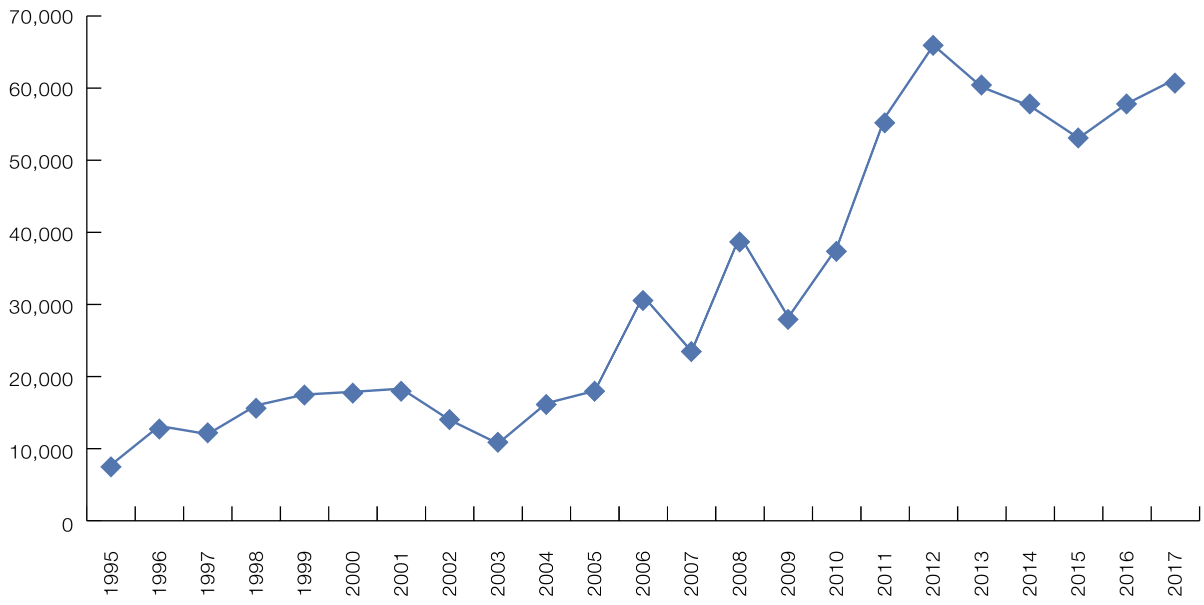
2.4.1 Analysis of Chinese outbound tourism to Brazil

Brazil, located in the southeast of South America, is the largest country in South America and the fifth largest in the world. Brazil boasts a vast territory and abundant natural resources. In the north is the Amazon Rainforest, known as the lungs of the earth. At the southern end is the magnificent Iguazu Falls. The everglades in the middle west are a paradise for wildlife. The long coastline is covered by many beautiful beaches. Brazil's world-famous natural landscape and unique historical and cultural heritage attract a lot of international tourists every year. Brazil enjoys the reputation of 'football kingdom'. Its football culture, famous teams and stars have long been known and favoured by many Chinese football fans. In addition, the Chinese people are also deeply impressed by Brazil's strong Latin American characteristics, especially its passionate samba and colourful carnivals. The Summer Olympic Games held in Rio de Janeiro in 2016 drew the attention of many Chinese sports fans, which also increased the awareness of Brazil as a tourism destination among more Chinese people.

Through the ADS framework agreement, Brazil became one of the first South American destination countries for Chinese citizens' group tours in 2005. In recent years, Chinese tourists have travelled abroad more frequently and gained rich outbound travel experience. Their travel destinations have gradually expanded to the whole world, and South America and Brazil fall into this ambit. Chinese tourists travelling to South America for the first time usually visit major scenic spots and tourist sites and cities in Brazil. The number of Chinese tourists visiting Brazil has grown steadily in recent years. According to UNWTO data, the number of Chinese visits to Brazil reached 61,250 in 2017, with an average growth rate of 7.4% over the previous three years.[48]

At present, most Chinese tourists visit Brazil by joining the group tours organized by Chinese tour operators. The combined tours to four or more South American countries including Brazil, and the in-depth tours to Brazil and Argentina are the popular products of tourism to South America among Chinese tourists. The tourism products to Brazil mainly consists of sightseeing tours to the major tourist cities and famous natural attractions, such as Rio de Janeiro, São Paulo, Manaus, Amazon and Iguazu Falls. Brazil, with its vast territory, rich species and diverse landforms, is suitable for in-depth travel. As Chinese tourists demand more in-depth and customized tours, Brazil is well placed to cater to this demand.

Figure 2.9 Chinese tourists arrivals in Brazil, 1995–2017



Source: World Tourism Organization (UNWTO).

Market demand

Measured in number of Amadeus searches for international travel through online travel agencies and metasearch websites, Brazil's market share of global demand in 2018 was 0.94%, and of Chinese demand 0.22%. The key cities from which the searches for Argentina originated were Shanghai (54%), Beijing (14%) and Guangzhou (4%) whilst the rest of China represented 28%. The key destination cities in Brazil were São Paulo (72%), Rio de Janeiro (15%) and Brasilia (3%), whilst the rest of Brazil accounted for 10%.

Total air passengers

In 2018 a total of 121,700 air passengers are estimated to have travelled from China to Brazil, the majority (86%) travelled in economy whilst 14% in premium cabins (business and first class).[49] Unfortunately, there are no direct flights between China and Brazil and all air passengers had to connect: 68% of air passengers made one connection and 32% made two connections. The top ten connection cities are given in table 2.10.

The top 10 airlines that air passengers travelled on between China and Brazil in 2018 are given in table 2.11.

The main source cities in China in terms of air passengers to Brazil were Shanghai (39%), Beijing (23%) and Guangzhou (12%), whilst the rest of China accounted for 26%. The main destinations in Brazil were São Paulo (73%) and Rio de Janeiro (14%), whilst the rest of Brazil captured 13%.

2.4.2 Visa facilitation

Currently, Chinese tourists visiting Brazil need to apply for tourist visas. Along with the visa application, tourists need to submit a series of supporting documents, such as incumbency certification, financial proof, travel itinerary, hotel reservation information and so on. Brazilian visa applications were previously processed through the embassy or consulate of Brazil. To shorten visa processing time, Brazil set up visa application centres in Beijing, Shanghai and Guangzhou in 2015. Tourist visa applications can be submitted through these centres. In 2017, Brazil further facilitated the process and reached an agreement with China on simplifying visa procedures for tourists. Starting from 1 October 2017, Chinese citizens who go to Brazil for tourism, family visits or business purposes get visas with a maximum validity of five years, which can be used for multiple entries, each of which allows stays of up to 90 days. The issuance of long-term valid visas plays a positive role in attracting more Chinese tourists to Brazil.

2.4.3 Challenges and opportunities – policies to boost tourism cooperation between the two countries

China and Brazil established diplomatic relations in 1974. In 1993, the two countries established a strategic partnership. In 2012, the bilateral relations were upgraded to a comprehensive strategic partnership. Relations between the two countries have been developing smoothly with frequent high-level exchanges and cooperation in many areas. The economic and trade exchanges between the two countries are very close. China is, since 2009,

Table 2.10 Leading connecting cities for Chinese outbound visitors to Brazil, 2018 (share, %)

Connection city	Air passengers
DXB – Dubai	14
PEK – Beijing	14
FRA – Frankfurt	12
DOH – Doha	8
CGK – Paris	8
ADD – Addis Ababa	8
AMS – Amsterdam	5
IST – Istanbul	4
DFW – Dallas Fort Worth	3
YYZ – Toronto	3

Source: Amadeus Traffic Analytics.

Table 2.11 Leading airlines used by Chinese passengers to Brazil, 2018 (share, %)

Airline	Air passengers
Emirates	15
Lufthansa	12
Air China	10
Qatar Airways	8
Ethiopian Airlines	8
Air France	7
KLM	6
United Airlines	5
Turkish Airlines	4
Air Canada	3

Source: Amadeus Traffic Analytics.

Brazil's largest trading partner and has been establishing itself as a major source of investments in the country.[50] The cooperation and exchanges between China and Brazil in the political, economic and trade fields have raised the visibility and popularity of Brazil in China. The success of the 2014 World Cup in Brazil and the 2016 Olympic Games in Rio de Janeiro made Brazil a desirable destination for many Chinese tourists. According to data released by Ctrip, China's largest online travel agency, Brazil was one of the fastest growing destinations for Chinese outbound tourists in 2018, and its attraction to Chinese tourists has increased significantly.[51]

Brazil is also watching closely the development of China's outbound market and hopes to attract more Chinese tourists to the country. However, the long distance and high cost of travel have been the major barriers hindering Chinese tourists from travelling to South America. Safety perception of the destination is also one of the challenges impacting on Chinese outbound travel to Brazil.

To address the challenges facing the country's tourism development, Brazil drew up the National Tourism Plan 2020 in 2018 and established the guidelines and strategies for the implementation of the National Tourism Policy. According to the plan, Brazil's tourism is geared to taking advantage of the country's tourism development potential. The national tourism policy will guide the coordinated development of tourism related sectors and industries, and help achieve Brazil's tourism priorities and build Brazil into a global tourism power. The plan calls for doubling the number of foreign visitors to 12 million by 2022 from 6.5 million in 2017. To achieve this goal, Brazil will strengthen overseas marketing, continue to promote e-visas, and increase the number of international flights. In addition to making travel easier, Brazil will implement a public safety and social protection plan from 2018 to 2028 and include tourism in the new public safety plan to address foreign tourists' concerns about the safety of Brazilian destinations.[52]

Considering China as one of the strategic international markets, Brazil has strengthened the promotion of its tourism resources in China and introduced Brazilian destinations and rich tourism products to the Chinese tourism industry by participating in large national and local exhibitions and organizing road shows in many Chinese cities. Meanwhile, Brazil has also strengthened cooperation with neighbouring countries in South America, such as Argentina and Peru, to do joint promotion in China.[53] In the wake of the digital marketing boom, Embratur launched the Chinese-version Marketplace, a tool focussed on trade business (B2B).[54] Another action was the launch of the new product, China Market, with specific information about Chinese tourism. The material was developed with the aim of increasing the understanding of the market and to facilitate action in the country and subsidize the Brazilian trade so that local companies understand the trends and opportunities to meet the demands of Chinese tourists.[55] In terms of facilitation of Chinese tourist travel, Brazil opened visa centres and introduced five-year long-term valid visas to encourage more Chinese tourists to visit Brazil.

2.5 Recommendations

Both Argentina and Brazil are very confident of the future development of Chinese outbound tourism and have attached greater importance to the Chinese market. However, as a long-haul destination, South America faces competition from other continents such as Europe, North America and Oceania. Based on the feedbacks from Chinese travel trade, in order to attract more Chinese tourists, it is recommended that both Argentina and Brazil be more active and creative in destination marketing and promotion, more proactive in improving travel facilitation and more comprehensive in product development.

2.5.1 Enhance the promotion and marketing of South American destinations

Considering the costs related to travelling to South America, Chinese outbound tourism to South America is still a niche market. Most Chinese tourists like travelling to the better-known destinations. Therefore, it is very important for South American destinations to enhance publicity to increase awareness of the destination and to build a positive image.

For Brazil and Argentina, it is recommended to establish an online presence in China with a Chinese website or build a presence on China's social media networks such as Sina Weibo and/or Tecent WeChat. Many overseas destinations have been successful in attracting more followers to their social media accounts by posting beautiful photos and inspiring stories about destinations, sharing unique experience and adventures as well as introducing festivals or local activities. As monitored by the Wechat Rankings for travel brands, food, flowers, and family travel were the standout themes of first half of 2018. In comparison, 2019 has seen less flower-related content at the top of the weekly WeChat Rankings. Instead, romance has taken the lead and celebrity content has helped propel some destination accounts to new heights. Restaurant recommendations are still reliable, while wildlife- and nature-related content, as well as TV references also stood out. A major shift in 2019 has been the prevalence of short videos and GIFs in WeChat content, which is becoming a must for tourism marketing.[56]

The destination promotion agencies of Argentina and Brazil could also partner with Chinese entertainment or movie production companies to shoot scenes or programmes in their famous attractions, which will increase the popularity of destinations and attract more young travellers. Another opportunity is to work with Chinese celebrities, stars, influential bloggers or professional travellers to promote destinations. These celebrities, stars and online leaders have already built a community around themselves and their personal experience and recommendation carry weight.

2.5.2 Improve facilitation of tourist travel – visas and air connectivity

Long travel time and high costs hinder the growth of Chinese tourists' demand for South American destinations. Hence, it is recommended that Argentina and Brazil take proactive measures to improve the travel facilitation for Chinese tourists in order to stimulate market demand and attract more Chinese tourists.

In the past few years, Argentina has been working actively to simplify visa application procedure through implementing Electronic Travel Authorization (AVE), as well as extending the validity of the tourist visa within ten years. However, due to the strong seasonality of outbound tourism to Argentina, most Chinese travellers take the trip to Argentina during its summer season (September to March), which is also the peak period for applying tourist visas. The process of visa application is often delayed during the peak season, which has led to complaints from the Chinese travel trade and tourists. Hence, the policy to further simply application procedure is welcome.

In the case of Brazil despite setting up visa application centres in Beijing, Shanghai and Guangzhou in 2015, Chinese tourists still need to submit visa application physically at one of the visa processing centres with required supporting documents. This procedure is considered to be less friendly and more onerous when compared to other South American countries such as Argentina, Peru or Chile, which have instead issued electronic travel authorization or waived visa application if Chinese tourists meet certain entry criteria.

To provide more reliable and affordable air transportation services is another area that destinations could look into in order to facilitate tourist travel and lower travel costs. Currently, domestic tourism travel in South American destinations such as Argentina and Brazil rely mostly on air transportation services. However, there are no direct flights between major tourist cities or attractions, such as Manaus and Iguazu in Brazil, Great Glacier and Tierra del Fuego or Iguazu in Argentina. Most flights between two tourist cities are connected or transferred through airline transportation hubs such as São Paulo and Rio de Janeiro in Brazil or Buenos Aires in Argentina. It is recommended that Both Argentina and Brazil take appropriate measures to provide more convenient air services.

2.5.3 Diversify and broaden tourism product portfolios

With increased overseas travel experience, Chinese tourists have become more mature in terms of both their consumption concept and attitude to travel. Instead of hurried sightseeing and shopping tours, they are tending to choose in-depth and experiential tours, which will bring them authentic, inspired and personalized travel experience. Innovative products that meet individualized demand and provide high-quality experiences will become the leading force in the Chinese outbound tourism market. Hence, it is important for Argentina and Brazil to upgrade product positioning, enrich the contents of destination product offerings and develop new themes to meet different needs of Chinese tourists and stay ahead of competition.

Diversified tourism needs and upgraded consumption level has also driven the emergence and rapid development of customized travel. Travellers who fall into this category are usually high-end customers with strong buying power. They are more likely to explore and experience the uniqueness and natural beauty of new destinations, which will bring differentiated personal experience from the mass travelling destinations. South American destinations should enhance the development and marketing of less-known destinations and attractions and upgrade overall tourism service levels to target these high-end customers.

2.5.4 Enhance cooperation with Chinese travel trade

Destinations that seek to penetrate the Chinese tourism market or attract more Chinese tourists are recommended to enhance cooperation with the Chinese travel trade in different regions to understand market needs develop tailored promotion activities:

Training programmes: In order to build a productive distribution network with qualified travel trade partners, Argentina and Brazil can provide regular online training courses for selected travel agencies and equip them with professional knowledge about their destination and product offerings. Many mature destinations have developed comprehensive training programmes with integrated courses to help Chinese travel agencies better understand the uniqueness of their tourism resource so that they can serve their customers and promote the destinations more effectively. It is also recommended to develop some incentive schemes to encourage more travel consultants to take the training courses and excel in selling the South American destinations.

Enhance relationship with Chinese tour operators: Argentina and Brazil could organize familiarization trips and invite Chinese outbound tour operators to visit destinations so that they can obtain first-hand information and experience on destination. The familiarization trips will also help the Chinese travel trade to engage with local tourism suppliers and develop tailored tour package products to Chinese tourism market.

2.6 Conclusions

The Chinese outbound tourism market has been growing fast and developing robustly in the last decade thanks to a healthy economy, increased personal income, loosening of tourism policies and travel facilitation. China has become the largest tourist source market in the world and top spender for international tourism. The number of Chinese outbound trips has reached a record high of 150 million in 2018, a double-digit growth over 2017. The Chinese outbound tourism market is expected to maintain double-digit growth in 2019. As the most populous country in the world, the potential for further outbound growth is tremendous given that the number of outbound tourists only account for a small portion of the overall population. Stable economic development, simplified visa policies of foreign countries, enrichment of tourism destinations and products will also drive the continuous growth of Chinese outbound tourism market.

After quick development in the past decade, Chinese outbound tourism market has been undergoing transformation. Chinese outbound tourists are becoming mature with increasingly diverse and individualized consumer demands. Experienced travellers are interested in in-depth tours and experiential tours that enable them to have a better travel experience. The Chinese outbound tourism market has also seen an increasing number of independent tourists, setting foot in neighbouring counties and far-off destinations, even the Polar region. Chinese millennials have become the major force driving the growth of Chinese outbound tourism.

As a long-distance tourist destination, South America is home to more than dozen countries each possessing different ethnic groups that have respective characteristics that add enormous value to the intangible cultural heritage manifested in art music dance and gastronomy. Both Argentina and Brazil have enhanced their marketing and promotion in China and taken measures to facilitate the travel of Chinese tourists by launching friendly visa policies or simplifying visa application procedures.

With beautiful scenery, well-preserved natural environment, unique culture and customs, Argentina and Brazil are highly attractive to Chinese tourists, and the diversity of tourism resources creates greater opportunities for developing diverse tour products and activities, including in-depth and experiential tourism. However, there remain many challenges when developing the Chinese outbound tourism market, such as the long distance from China, high travel cost, language and cultural differences, competition from other mid- and long-distance destinations, and especially security issues in some of the destinations. To counter those challenges and seize the market development opportunities, Argentina and Brazil are recommended to develop a Chinese market-focussed strategic plan and to take a specific approach to adapt to the changes of the Chinese market and consumer needs. It is recommended that both Argentina and Brazil take advantage of different media channels that are widely used in China, to increase destination awareness and actively promote destinations tourism resources to Chinese tourists. In addition, they should enhance the cooperation with the Chinese outbound tour operators to gain local support in destination promotion and tourism product distribution. Launching more favourable visa policies or measures would also help facilitate the travel of Chinese tourists and boost the market demand.

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It should be noted that data reflected by UNWTO on international tourism receipts and expenditure for China is based on the balance of payments (BOP) travel credit and debit items (as with other countries for reasons of consistency and international comparability) reported by the State Administration of Foreign Exchange (SAFE) at: www.safe.gov.cn/en/BalanceofPayments/index.html

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3 Health tourism in Asia

Health motivation for travel is an evergreen topic and encompasses both medical and wellness tourism. Numerous countries have identified these forms of tourism as one of the key development areas for the near or distant future all around the world. The wellness movement has become mainstream both at individual and corporate levels, and the health-care industry is considered now to be of strategic interest and a priority for tourism development. Various social, economic and political factors, as well as technological innovations shape demand and supply of wellness and medical services. Travelling for health purposes has probably never received as much interest as it does currently.

There are several definitions and terminologies being used for such tourism forms. The proliferation of terminologies has made the understanding, the analysis, as well as the regulation of wellness and medical tourism rather difficult. In this chapter the recommended definitions set in the pioneering study by the World Tourism Organization (UNWTO) and the European Travel Commission (ETC) titled *Exploring Health Tourism* are applied.[1]

In the study, *health tourism* is defined as:

> "Forms of tourism which have as a *primary* motivation the contribution to physical, mental and spiritual health through medical and wellness-based activities which increase the capacity of individuals to satisfy their own needs and function better within their environment and society."

It is understood that health tourism encompasses a broad range of activities, therefore it is the umbrella term for sub-categories of *medical tourism* and *wellness tourism.*

Medical tourism is defined as:

> "Form of tourism which involves trips to international or domestic locations to use medical and evidence-based healing resources and services (both invasive and non-invasive). This can include diagnosis, treatment, cure, prevention and rehabilitation."

Medical tourism usually focusses on invasive interventions such as surgery, including cosmetic surgery and dentistry. However, it can also include non-invasive and evidence-based interventions such as the therapeutic application of thermal waters that have been proven to have healing benefits and are prescribed by doctors as health treatments. In Asia, what are called thermal waters in Europe, are usually termed hot springs. However, it is important to note that many of these sites are also used by tourists for leisure, recreation and wellness rather than healing or medical interventions (whether they contain waters with healing properties or not). These are often referred to as thermal or hot spring spas or resorts with hot spring facilities.

Wellness tourism by the UNWTO/ETC study is defined as:

> "Forms of tourism which aim to improve and balance all of the main domains of human life

including physical, mental, emotional, occupational, intellectual and spiritual. The primary motivation for wellness tourists is to engage in preventative, proactive, lifestyle-enhancing activities such as fitness, healthy eating, relaxation, pampering and healing treatments."

Wellness activities usually take place in purpose built centres, wellness facilities units or spas, wellness hotels and resorts which provide complex leisure and recreation activities. These activities often focus on healthy lifestyle, fitness and nutritional offers, and sometimes on specialized body-mind-spirit activities. Holistic or spiritual retreats, which offer yoga and meditation, as well as self-development activities (these can be mental and psychological, as well as physical) are also part of the wellness supply.

Asian health systems and those associated with tourism, therefore, tend to emphasize body-mind-spirit connections and working with the body's energy systems more than other regions of the world. Such therapies and treatments are becoming more popular in the west, but many of them originated in Asia (e.g., yoga and ayurveda from India, Hindu and Buddhist meditation, massage therapies, Chinese Tai Chi and Qi Gong, and traditional Chinese and Korean medicine). All around the world, there is almost no spa or wellness centre without such therapies. Hot springs are also abundant in some countries like Japan, as well as the Republic of Korea, China and Thailand. Spas and wellness resorts have been developing fast across the region, especially in beach and island locations such as Thailand, Sri Lanka, Maldives or Indonesia.

However, Asia has also been known as a world leader in medical tourism for more than ten years, especially Singapore, Thailand, India, the Republic of Korea and Malaysia. The market has been growing quickly and now includes several other aspiring countries, such as the Philippines and Viet Nam. One of the fastest growing medical tourism destinations at present in Asia is the Republic of Korea with its strong government support, which is rooted in medical technologies at relatively competitive prices for highly-skilled surgeries. Medical tourism is considered as the most profitable segment of the health tourism industry in Asia.

3.1 Overview of health tourism in Asia

Health tourism is not a new phenomenon or tourism product to many Asian countries. Both in medical and wellness tourism certain Asian providers have been the pioneers of the global health tourism movement. The Bumrungrad Hospital in Bangkok, the holistic retreats of Bali and Australia or the luxury hotel spas of the Maldives have been shaping the industry for many years.

Case study 3.1: Medical tourism in Thai hospitals

Bumrungrad Hospital in Bangkok has won international acclaim and is probably one of Thailand's best-known facilities for medical tourism. In 2002, it was the first international hospital in Asia to be accredited by the Joint Commission International (JCI), an organization based in the United States of America which accredits health-care organizations in order to raise the standards of delivery.

Another leading Thai medi-care conglomerate is Bangkok Dusit Medical Services (BDMS), a hospital network that was started in 1969. This network currently contains 47 hospitals including Bangkok Hospital, Samitivej Hospital, BNH Hospital, Phyathai Hospital, Paolo Hospital and the Royal Hospital. Subsidiary companies include Bangkok Helicopter Services (for medical evacuations). Prospective patients are offered diagnosis, annual body check-ups, pharmaceuticals and complex or simple procedures at competitive rates. Bangkok hospital has an International Medical Centre (IMC) which caters for overseas patients from more than 100 nationalities.

There is even a special Japanese Medical Centre. The hospital runs its network of private hospitals in 17 locations across Thailand, including beach resorts like Phuket and Samui. Thailand is also known for its gender reassignment surgery, especially the Bangkok Phuket Hospital.[a]

The Ministry of Interior has approved 90-day visas for medical tourists from Cambodia, China, Lao People's Democratic Republic, Myanmar and Viet Nam. Patients can have a maximum of three companions to accompany them. This second phase of the medical visa scheme only applies to medical tourists going to places approved by the Ministry of Public Health, hence 130 hospitals and clinics have the ability to provide confirmation letters to visitors seeking medical treatment.[b]

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3.1.1 Main destinations and products

Medical tourism

Data suggest[2] that medical tourism in Asia dates back to the 1970s and grew exponentially since the 1990s.[3] After the Asian economic crisis of 1997, cheaper prices attracted western patients and retirees, whereas improved technologized medical care attracted cross-border tourists (e.g., wealthy Indonesians to Singapore and Malaysia or Bangladeshis to India). All of this was assisted by portable health insurance and international accreditation of hospitals. For example, the Republic of Korea is one of the several countries that has developed its own accreditation systems for health-care and/or medical tourism. The Korean Accreditation Program for Hospitals Serving Foreign Patients (KAHF) has endorsed nine hospitals.[4]

It should be noted that the terminology *international patients* may not necessarily refer to international medical tourists. As the UNWTO/ETC publication on *Exploring Health Tourism* highlighted, in country statistics, foreign students, expatriates or military personnel, all would appear as international patients but they are not recognized as medical tourists.

It is widely accepted that the main factors that made many Asian service providers, as well as destinations not only famous but also successful are as follows:

- Significant improvement of health-care standards;
- Affordable prices and value packages;
- Implementation of latest health-care technology especially in imaging and screening, precision cancer treatments and minimal invasive surgery;
- Employment of board certified physicians and support staff trained in the United States of America or Europe;
- Affiliation with reputable provider hospitals, teaching hospitals and specialty centres; and
- Implementation of international certification systems, such as the Joint Commission International (JCI).

International and especially intraregional medical tourism is also boosted by the inequalities of health-care provision in Asian countries. For instance, the reason for Indonesians travelling to Malaysia for health care is fuelled by the higher quality health-care service in Malaysia. The familiar cultural ties, religion, as well as gastronomy (including halal foods and drinks) make Asian countries and therefore intraregional health-care motivated travel very attractive.

The Medical Tourism Index (MTI) measures the attractiveness of a country as a medical tourist destination. Out of 41 countries worldwide, from Asia China, India, Japan, the Republic of Korea, the Philippines, Singapore, Thailand and Taiwan Province of China are included. Singapore is fourth and India fifth in the MTI as the most desirable countries for international medical tourism.[5]

From a broader perspective it is to be noted that several countries in Central Asia[6] are starting to set their sights on attracting health tourists. For example, Kazakhstan is developing programmes to attract more medical tourists from countries like Kyrgyzstan, Russian Federation, Uzbekistan, China, Iran and Turkey. Surgical medical tourism is often combined with climate therapy, hydrotherapy and mud therapy.[7] Georgia is famous for its spa resorts, as well as dental treatments and attracts an increasing number of medical tourists mainly from post-Soviet countries and from the diaspora.[8] So far, these countries were considered as sender countries to the main Asian medical tourism hubs. These developments may have direct impact on the medical tourism flows and business in many countries.

Case study 3.2: Government support for medical tourism in Malaysia

Over 1.2 million health-care travellers came to Malaysia for treatment in 2018. Identified as a key niche export service to contribute to the economy, the Ministry of Finance of Malaysia and its subsidiary, Malaysia Healthcare Travel Council (Malaysia Healthcare – MHTC), are taking practical steps to expand this sector further. The overall 2020 target is to go beyond the USD 479 million mark in hospital revenues from international patients and achieve a total economic impact of USD 1.9 billion. Several key initiatives were highlighted during the announcement:

The fertility and cardiology sectors of Asia

The new initiative is anchored in the private health-care sector's medical expertise in these niche fields and capitalizes on the high demand from neighbouring countries including Indonesia, Viet Nam, Myanmar, China, Singapore and, more recently, India. Malaysia Healthcare is working with fertility centres using the latest technology, equipped with experienced doctors and embryologists and have recorded impressive success rates.

Malaysia has an extensive history in the field of cardiology which led to the establishment of the National Heart Institute (IJN), a hallmark for many procedural firsts in the field of medical expertise, stamping its mark as the preferred cardiac centre in Asia and the Pacific. The increase in successful ground-breaking medical breakthroughs and demand for heart surgeries moved the Ministry of Health Malaysia to establish heart centres across the nation which house many key cardio specialists serving in both the public and private sectors.

Further tax allowances and deductions for medical tourism

There will be:

- An extension in the Investment Tax Allowance for medical tourism until 31 December 2020;
- A double tax deduction on expenditure incurred for dental and ambulatory services; and
- An increase in the special tourism health-care incentive from 50% to 100%.

Investing in health promotion – Malaysia Year of Healthcare Travel 2020 (MYHT 2020)

Malaysia Healthcare will be leading Malaysia Year of Healthcare Travel 2020 (MYHT 2020) to run in tandem with Visit Malaysia 2020 (VM 2020). MYHT 2020 will celebrate quality health care and healthy lifestyles. Malaysia Healthcare also anchors InsigHT, which is Malaysia's annual medical travel market intelligence conference which gathers thought leaders and partners locally and globally to collaborate and advance the medical travel industry in Malaysia and the Asian region.[a]

a) Azli, S. (2018), 'Top Medical Tourism Destination Has Even Bigger Plans', *International Medical Tourism Journal,* 16 May 2018 (online), available at: www.imtj.com/articles/top-medical-tourism-destination-has-even-bigger-plans & personal communication (23-06-2019).

The vast majority of international medical tourism services in Asia are operated by private businesses. As the case of MHTC suggests, however, the role of governmental bodies, as well as cooperation between the public and private sector play a significant role in a country's position, competitiveness and performance in medical tourism.

Criticism, however, draws attention to some potential ethical issues such as:[9]

- Two tier health-care provision for tourists and locals;
- Health worker migration and brain drain from rural to urban areas; and
- Trade in medical supplies, pharmaceuticals and illegal organ trafficking.

Wellness tourism

Asia is as much well known and attractive for wellness tourism as it is for medical tourism. India, especially Kerala, has long been the key destination for those interested in holistic services such as meditation or yoga. Retreats, ashrams, ayurvedic centres have been attracting visitors from all over the world. Bali has become a must-visit destination for spiritual travellers, as well as luxury spa resort enthusiasts. Australia's Byron Bay has long been a favoured hideaway for travellers looking for small-scale holistic experiences.

There has been a notable shift towards wellness tourism in other Asian countries in recent years. Sri Lanka, for example, is also looking into how the country can capitalize on its rich cultural traditions, lifestyle and natural assets in wellness tourism.

Since 2015, the Korean Tourism Organization has been developing a new marketing concept for the health tourism industry based around *health, beauty* and *wellness.* A recent report[10] suggested that wellness tourism would increasingly become a focus in the Republic of Korea for the following reasons:

- Ageing society;
- Increasing interest in quality of life;
- Change of medical paradigm from *cure* to care;
- Increasing GDP and spend per capital in Asian countries;
- Increasing therapy for a number of lifestyle diseases such as digital dementia, obesity, burn-out syndrome, depression, psychological problems connected to modern lifestyles;

Case study 3.3: Ayurvedic wellness tourism in Sri Lanka

The Sri Lankan Government commissioned a Wellness Tourism Strategy in 2017. One of Sri Lanka's traditional assets is ayurveda, but wellness tourism based on ayurvedic approaches has been relatively under-developed. On the other hand, ayurvedic services are sometimes offered as a complement to western medicine within medical tourism, which tends to be private sector-led. Companies in medical tourism have already recognized the growing demand for integrating ayurveda into wellness and have started developing products for wellness tourism. Guests can come for medical treatments using ayurveda, on the other hand when guests visit spas and wellness hotels, they can also receive Ayurvedic treatments as one of the services and treatments available. In the mid- and long-term, investments are planned for the renovation of existing hotels and resorts and for the development of new properties following the recommendations of the strategy:[a]

– Strategic objective 1: Develop coordination and improving cohesion in traditional and western health tourism in close cooperation with stakeholders;

– Strategic objective 2: Set up a quality assurance system for wellness and traditional health system; and

– Strategic objective 3: Build information about the Sri Lankan health tourism sector and about its target markets.

a) Puczkó, L. (2018), 'Asia Research: Asian Traditions', in *Spa Business Handbook,* pp. 134–135 (online), available at:www.spahandbook.com/2018/?email=arif@360-wellness.com&pub=SBHe&date=180912
(22-07-2019).

- Interests in health and development of wearable health checking devices;
- Trends in prevention and health services; and
- Rapid growth of the global wellness market.

The same social trends are visible across most of the Asian region, therefore a growth in wellness tourism is likely in other countries too. For example, the growing emphasis on health tourism in Japan is linked to stressed employees and research points out to the benefits of short breaks.[11]

An initiative in the Philippines looked at the competitiveness of the country in comparison to selected Asian competitors such as Thailand, Malaysia, Singapore or Viet Nam.[12] The critical overview highlights some rather crucial factors that may impact the country's development opportunities in health tourism such as:

- Lack of sufficient number of health-care personnel;
- Lack of accredited facilities; or
- Current state of the transportation infrastructure.

China has significant resoucres, as well as plans for developing health tourism. Most of these plans are part of China's Belt and Road Initiative (BRI).[13] This initiative supports the development of new hospitals in the Belt and Road Health Corridor, many with international patient centres. The BRI has plans for creating 30 centres by 2020 to provide traditional Chinese medicine (TCM) medical services and education, and to spread its influence. Centres have already opened in more than two dozen cities, several of them in Europe (e.g., Barcelona and Budapest). Since China's BRI covers over 70 countries containing 70% of the world's population, the impact on international medical tourism could be significant. Beijing and Hainan have pioneered TCM tourism and are actively

Case study 3.4: The Philippines – 'Islands of Wellness' or medical tourism destination?

The Philippines has been promoting its 'Islands of Wellness' for several years now, with several of its spas being accredited by the Government to deliver traditional and authentic Filipino treatments. These include dagdagay which is a traditional foot massage using two bamboo sticks, introduced by the tribal people from the Highland Cordillera Region. A herbal foot bath is given as a pre-treatment ritual. Other treatments include banos, ventosa and su-ob. The Philippines is also famous for its *hilot* intuitive touch therapy which is customized to each client to remove energy imbalance and create wellness. Virgin coconut oil and warm strips of banana leaves are used before and after treatment.[a]

The *International Medical Travel Journal*[b] stated that the Department of Tourism was relaunching the Philippines as a medical and wellness tourism destination. The Department of Tourism issued a six-month medical visa as part of the plan, which would be granted to tourists whose main purpose for travel to the Philippines was to seek medical treatment. The Department of Tourism, Department of Health and the Department of Trade and Industry's Board of Investments identified five segments in the international medical travel sector:

1. Tourists who require medical attention due to illness;
2. Expatriates already living in the country;
3. Health tourists for spa and other wellness services;
4. Medical tourists seeking medical tests or health checks; and
5. Medical tourists seeking surgery, cosmetic surgery or dental care.

A majority who fall most into the latter two categories are Filipinos who live and/or work abroad and combine treatment with a family visit. There is still a need for the Government to persuade medical institutions to gain international accreditation, and for the accommodation to incorporate more wellness options into their offers.

a) Department of Tourism Philippines (n.d.), *Health & Wellness* (online), available at: www.experiencephilippines.org/health-wellness-tourism/ (27-06-2019).

b) 'Philippines plans to promote wellness and medical tourism' (2018), *International Medical Travel Journal,* 27 August 2018, IMTJ (online), available at: www.imtj.com (27-06-2019).

targeting domestic and international health travellers, particularly from Hong Kong (China) and Macao (China). There are plans to build 15 TCM 'model zones' similar to the one in Hainan by 2020 (Boao Lecheng International Medical Tourism Pilot Zone)[14] and 13 demo zones for health tourism many of which would capitalize on the rich hot spring resources.[15] Such development interest is certainly supported by data such as the one from the China Tourism Academy,[16] that about 2% of visitors from Hong Kong (China) and Macao (China) sought traditional Chinese therapies in 2017, while almost 1% of foreign travellers to mainland China that year bought tourism products related to TCM.

3.1.2 Demand for health tourism

There are numerous estimates and assumptions about the actual size of medical or wellness tourism in Asia as well. There is, however, very little information about which of the rather different estimates are really reliable.

Medical tourism demand

One study[17] suggests that Asia and the Pacific would gain prominence in medical tourism market at fastest compound annual growth rate (CAGR) of 15.5% focussing on chronic diseases such as cancer. The reasons for this

Case study 3.5: The potential for wellness tourism in China

Like other countries in Asia, China has an increasing ageing population who will need social care, as well as medical services. However, wellness (tourism) is also being proposed as a solution. 2012 was declared 'China Happiness and Health Tour' year by the China National Tourism Administration to promote wellness tours in China. Chinese are relatively fitness conscious with seniors exercising daily in parks, and many citizens enjoying water therapies, massages and reflexology.[a] They describe how wellness culture is already infused in Chinese culture, which includes ancient traditions of massage, bathing and seeking balance physically and spiritually. Traditional Chinese medical practices, including acupuncture, cupping, hot springs and herbal medicine treatments, are attracting many people, as well as modern wellness and centres. Spas are becoming big business in China with more than 180 spa centres and as many as 8,000 bathhouses. Wellness and spa centres in China are mainly located in Shanghai, Beijing, Hong Kong (China) and Shenzhen, and 70% of them are located within hotels. The wellness sector has grown in second-tier cities like Xian, Hangzhou and Tianjin, as well as on Hainan Island, in Yunnan province and Indochina. Eight wellness attributes and resources have been identified: fresh air and clean water (including hot springs), landscape, natural resources, peaceful environment, safety, relaxing environment, healthy cuisine and TCM.

Some hotel spas in Hong Kong (China) have created a new market trend of group spa parties (the so-called "sparty") to attract young urban professionals.

Over one hundred Chinese temples have been holding themed meditation camps since 2014.[b] Tourists come to the temples, where they live, work, eat and meditate. The research shows that tourists enjoy the separation from daily life, the landscapes in the locations, the temple atmosphere, the contact with monks and mentors, the sharing of experiences with like-minded individuals, and the sense of personal wellness that participants obtain.

Several recommendations have been made for the development of future wellness tourism in China especially looking at spa operations and products, including:[c]

- Quality of the wellness tourism product (e.g., improve training, benchmarking, international service standards and brands);
- Preventative measures for safety, security and sanitation; and
- Government support (e.g., stimulating investment and promotion) but also public-private partnerships (e.g., for monitoring and supervision).

a) Heung, V. C.; Kucukusta, D. and Song, H. (2011), 'Medical tourism development in Hong Kong: An assessment of the barriers', *Tourism Management,* volume 32, issue 5, pp. 995–1,005, DOI: https://doi.org/10.1016/j.tourman.2010.08.012.

b) 'Jiang, T.; Ryan, C. and Zhang, C. (2018), 'The spiritual or secular tourist? The experience of Zen meditation in Chinese temples', *Tourism Management,* volume 65, pp. 187–199, DOI: https://doi.org/10.1016/j.tourman.2017.10.008.

c) Kucukusta, D.; Pang, L. and Chui, S. (2013), 'Inbound travelers' selection criteria for hotel spas in Hong Kong', *Journal of Travel & Tourism Marketing,* volume 30, issue 6, pp. 557–576, DOI: https://doi.org/10.1080/10548408.2013.810995.

steady growth are attributed to increasing disposable income, easy accessibility of good quality health-care services, and assistance from local governments and tourism departments.

Research on demand has traditionally focussed on international (mainly Western) tourists travelling to Asia, even though the majority of health tourists are actually from the region. Medical tourists visiting Asian countries are divided into three groups:[18]

- The first group is called "value patients", i.e., coming to Asia from countries or regions where health-care costs are higher such as the United States of America or Europe;
- The second group, "access patients", is formed by persons from countries where procedures are not available, waiting lists are long or where technology is less developed; and
- The third group, "quality patients", is formed by persons for whom cost is not a major barrier, but who seek the best doctors, nurses, facilities, procedures and technology. Many are from Islamic countries of the Middle East and it is reported that, for example, Thailand received 30,000 arrivals from Qatar for medical tourism in 2016.[19]

The results of a study on medical tourism marketing in Asia from 2000–2017[20] suggest that the perceived service quality and satisfaction are the most important factors to attract medical tourists. Insurance coverage and effective laws on the other hand are likely to act as major barriers. It has to be highlighted that the main factors affecting medical tourism development are cultural, distance, political and economic stability, regulations and laws, overall medical services quality, costs, and human resources.[21] Other barriers can also be identified such as costs, infrastructure, the government's attitude, policies and regulations, promotion, expertise, investment potential, language and communication, as well as facilities and attractions.[22]

Cross-border medical tourism is common in Asia, for example, Laotians have been going to Thailand for health care since the 1970s[23] and Cambodians travel to Viet Nam, or Indonesians to Malaysia. According to a rather interesting observation medical tourists from Turkey, Armenia and Iraq tend to visit medical tourism destinations that are close to the border such as those in Iran, east and west Azerbaijan and Kurdistan.[24]

During the early years of intra-Asian medical tourism, Japan was considered to be one of the key generating countries[25] because it had a health-care service that was under considerable pressure due to an ageing population, but with a lack of migrant health workers.[26]

The types of interventions intra-Asia medical tourists are looking for should not be generalized.[27] It was observed that Japanese tourists preferred to travel abroad for major surgery, whereas Chinese tourists preferred to travel abroad for minor surgery. Chinese have been more interested in aesthetic services, whereas Japanese tourists were more interested in rehabilitation services. Chinese tourists tend to go to the Republic of Korea for cosmetic surgery.

Cosmetic surgery has become one of the most popular medical tourism forms, and the boom of modern culture from the Republic of Korea (i.e., K-Pop and K-Dramas) has influenced the demand for a combination of tourism and cosmetic surgery, especially from neighbouring countries. The beauty industry in the Republic of Korea, China and Japan – K-Beauty, C-Beauty and J-Beauty, respectively – has become one of the key reasons why medical tourists from these countries visit plastic surgery clinics in another country. Chinese tourists and tourists from the United States of America constitute the main source market to the Republic of Korea, followed by Russian tourists who look for plastic surgery.[28] The young travellers who are important markets for plastic surgery represent the main demand for beauty products from the Republic of Korea, e.g., masksand creams and various beauty lines.

Iranian officials claimed that the number of foreign nationals travelling to Iran to receive medical care has increased tenfold over the past decade to reach 300,000 annually.[29] The main sources of health tourists to Iran are Iraq, Afghanistan, Azerbaijan and Pakistan while Iran has set its sights on becoming the region's medical tourism hub.

It should be mentioned here that in many countries, members of diaspora communities represent attractive segments to target for home economies, especially in medical tourism. Diaspora related strategies are designed in order to mobilize emigrants for the economic development of the countries of origin. The diaspora is an important source for medical tourism demand in the Republic of Korea and in the Philippines. The efforts of the Philippines have been for the most part directed to the overseas Filipino workers.[30]

Case study 3.6: The markets for medical tourism in the Republic of Korea

Since 1999, the Government of the Republic of Korea has been promoting medical tourism actively, and the country is well known for its high-quality innovative medical care and services, highly trained and skilled doctors and advanced medical technology. The Republic of Korea has also become rather famous for its cosmetic surgery procedures, especially for Asian tourists.[a] Of those who come to visit the country for medical reasons, the largest number of patients comes from the United States of America, followed by China, Japan, the Russian Federation and Mongolia.[b] The country's Government tends to divide health tourists into three groups:

- Short distance groups requiring minor treatments such as the Japanese, Chinese and Koreans living overseas;
- Medical tourists from the Russian Federation, the Far East, South-East Asia and Central Asia, where medical services are less developed; and
- Tourists from economically advanced countries where health care is more expensive (e.g., United States of America).

In its 2016 marketing report, the Korean Tourism Organization points out the ever growing potential of the country's health tourism, noting that the number of tourists has grown from 60,000 to 815,000,[c] and that the number of medical tourism facilitators grew from 94 to 1,345 between 2009 and 2017.[d] In the same period, the origins of foreign visitors became more varied increasing from 141 to 190 countries in the same period. The marketing plan aims to enhance the tourists' satisfaction with medical services by setting up a specific wellness identity for the market in the Republic of Korea. It suggests the evolution from *poor health* medical tourism to *prevention and care.* This plan includes developing a larger destination area than the existing medical tourism destinations of metropolitan Seoul area, Busan, Daegu and a few more cities with medical infrastructure.

a) Holliday, R.; Cheung, O.; Cho, J. and Bell, D. (2017), 'Trading faces: The "Korean Look" and medical nationalism in South Korean cosmetic surgery tourism', *Asia Pacific Viewpoint,* volume 58, issue 2, pp. 190–202, 15 June 2017, DOI: https://doi.org/10.1111/apv.12154.

b) Guiry, M. and Vequist, D. G. IV (2015), 'South Korea's Medical Tourism Destination Brand Personality and the Influence of Personal Values', in *Asia Pacific Journal of Tourism Research,* volume 20, issue 5, pp. 563–584, DOI: DOI: 10.1080/10941665.2014.904804.

c) Lee, S. G. (2019), 'Medical Tourism Excellence Through Accreditation', in: *Medical Korea 2019, Proceedings Book 1,* pp. 95–107.

d) Jin, K. N. (2019), 'Korean Medical Tourism Facilitators: Business Models & Performance', in: *Medical Korea 2019, Proceedings Book 2–3,* pp. 96–107.

Wellness tourism demand

There is very little data available about the actual demand for wellness tourism. Hotels and resorts in several countries offer spa and wellness services for leisure, as well as for business travellers. Most of the spa and wellness service demand, however, is based on wellness demand during the stay and less so from core wellness motivation.

The Global Wellness Institute estimated that the top five wellness tourism markets in terms of international and domestic trips were China, India, Japan, the Republic of Korea and Thailand. China itself was estimated to have over 70 million of total trips per year (international and domestic), whereas in the case of Thailand this number was 12.4 million. On an international wellness-oriented trip, the highest average spenders were the Australians and Indians spending approximately USD 3,000 per trip while only USD 634 were Vietnamese spenders. The average spending on a domestic wellness trip was much lower, estimated at around USD 500 per trip in the case of Australia and New Zealand and only at USD 36 for domestic trips in India.[31]

The Tourism Observatory for Health, Wellness and Spa (TOHWS) ran a pilot study in 2018 in cooperation with the Asia Pacific Spa and Wellness Coalition aiming at mapping the most relevant market changes.[32] Although the female segment is still the typically dominant one in Asia – women represent around 65% of the share of total guests –, the importance of male guests is growing. There are several spa and wellness centres where the share of male and female guest is equal, and a few reported more male than female guests. The demand distribution, however, is expected to change. Survey partners confirmed the growing trend of social consumption – when treatments and services are consumed in small groups, rather than individually. This demand change will have direct impact on operations, but also space design, service zoning and allocations, communication, as well as guest journeys.

The Asia and the Pacific spa and wellness market today is dominated by luxury and upscale facilities. The role of international guests is significant in the region since more than 50% of guests are registered as international visitors, with most of those (60%) coming from Europe.[33] The main motivation of foreign guests remains the spa and wellness treatment and services, followed by the brand and reputation of the spa or wellness facility. The data suggest that technology, design or price play very little or no role in the foreign guests' motivation in selecting

a spa or wellness facility. This is rather important market information since spa and hospitality investors tend to spend significant amounts on spa design or technology. There is a high demand for complementary and alternative therapies and holistic treatments in Asia, which is a reflection of the rich spiritual resources and traditions of the region.

3.1.3 Health tourism providers in Asia

Hospitals and clinics

International medical tourists look either for a large general hospital or for a specialist clinic that offers high-level treatments and services in one or in a few specialties. There are certain countries, as well as health-care providers that need to be highlighted. In most countries, except the Republic of Korea, a handful of private health-care facility owner groups dominate the market:

- Thailand was probably one of the first Asian countries together with India that opened up its private hospitals for international patients and particularly for international medical tourists. Bumrungrad International Hospital and Bangkok Hospital have been playing important roles in medical tourism for many years.

- Malaysia has several significant players in the market and the Association of Private Hospitals Malaysia (APHM) comprises some 40 members. Hospitals such as the Sunway Hospital or Glenneagles Hospital have won numerous international awards for their service excellence in medical tourism. Based on recent data the vast majority of international medical tourists to Malaysian hospitals originate from Indonesia. It is estimated that in certain specialities up to 90% of medical tourists to Malaysia are Indonesian[34] and that the majority (66%) travel to Penang where an association of seven private hospitals formed the 'Penang Healthcare Group'.

- In Singapore the Parkway Group has been very active in international medical tourism markets. The group owns a network of hospitals in Malaysia, India and Brunei. Patients come to these hospitals for treatment from China, Viet Nam, India, the United States of America and the United Kingdom. Singapore Medicine, the multi-agency government–industry partnership helped the development of medical tourism in Singapore since 2003. Recently, however, the Government's interest appears to have shifted due to the increased competition in Asia.

- In India, the Apollo Hospitals Group is well established, with units across India including Delhi, Hyderabad, Chennai, Bangalore and Kolkata (Calcutta), most of which have JCI accreditation. According to the Indian Department of Tourism, the average cost of health care in India is about one fifth that of that in Western Europe or the United States of America and this is one of the main motivations of international medical tourists.

- Sri Lanka has 225 registered private health facilities including eight major and eleven medium private hospitals.[35] The capital city Colombo remains the medical tourism hub with many of the major private hospitals practicing western medical techniques being located there.

- The Republic of Korea has a large number of hospitals and clinics of which around 50 offer attractive services for international medical tourists according to Medical Korea. Several countries such as Mongolia and Kazakhstan have been working together with Medical Korea on bringing their patients to the Republic of Korea.

Wellness hotels, resorts and spas

The Asian wellness hotel, resort and spa scene is defined by three different features:

- Firstly, a couple of anchor properties have achieved global recognition. The list includes such prestigious properties such as the Ananda in The Himalayas (India), Chiva Som International Health Resort and Kamalaya Koh Samui (Thailand).

- Secondly, a couple of hotel chains have been capitalizing on the rich holistic and spiritual traditions of Asia in defining their brand, such as the Shangri La, Mandarin Oriental or the Oberoi. More and more hotels and resorts globally use or implement wellness treatments and experiences that are originally from Asia, such as Thai massage, ayurveda or TCM.

- Finally, reference is made to those facilities that happen to be located in Asia and have a spa or wellness centre in their offer. This group can be characterized by the luxury hotel and resort developments in the Mauritius, the Maldives or Bali.

In terms of spas and wellness facilities in Asia, the Global Spa Summit (GSS) and the Global Wellness Institute (GWI)[36] counted 21,566 spas in 2006 which increased to 38,819 spas in 2016,[37] making Asia and the Pacific the world's third largest spa market in terms of revenues and second largest market in terms of number of spas.

In the late 2000s, the Tourism Authority of Thailand branded the country the 'Spa Capital of Asia'. It is not an understatement to say that Thailand is regarded as one of the best wellness and spa markets and its potential for further growth is considered to be even greater than that of other competing countries in Asia. Most of these are based on traditional Thai massage, with the Thai Ministry of Education overseeing the training of therapists and the certification of therapist training programmes. The largest number of spa visitors currently come from China and a similar trend can be observed in Bali, too. In terms of local supply, the wellness and spa centres in China are mainly located in Shanghai, Beijing, Hong Kong (China) and Shenzhen, and 70% of them are located within hotels.

The Asia and the Pacific spa and wellness market is dominated by luxury and upscale facilities.[38] There is a high demand for complementary and alternative therapies and holistic treatments, as these reflect the rich cultural and spiritual traditions of Asia. Similar to the global statistics on spending, foreign guests are estimated to spend approximately USD 180 per day on spa and wellness services (excluding spending on accommodation or food beverage).

Australia's Byron Bay still remains to be an attractive destination for the holism and spirituality minded.

Case study 3.7: The Maldives

The Maldives are one of the dream destinations to many all around the world, especially for those looking for a romantic holiday and honeymooners. Most international high-end hotel brands operate properties on the islands with luxury spas and wellness facilities targeting both pampering seekers, as well as those looking for spiritual experiences. *Visit Maldives* identified Wellness and Spa as one of six important segments (in addition to 'honeymooners', 'luxury', 'diving', 'surfing and watersports' and 'MICE'). Spas and wellness resorts are categorized under 'The Spiritual Side of Life' in their online promotion and Visit Maldives estimates that there are around 110 top quality spas at island resorts plus some spas in Male. There is even a spa at Ibrahim Nasir International Airport. The spas pride themselves on their unique design, luxurious standards and signature treatments often based on local ingredients from the sea or nature. The first underwater spa in the world was created in a resort in north Male, which includes treatment rooms with views of coral reefs.

Source: VisitMaldives: https://visitmaldives.com/.

Facilities based on natural resouces

Natural resources are very important in health tourism, i.e., hot springs, healing mud or climate. Hot springs in particular are one of the important resources in many countries such as in Japan, the Republic of Korea, Thailand, China, Malaysia or the Philippines. Many other countries such as Lao People's Democratic Republic, Cambodia, India, Nepal, as well as Bhutan also have hot spring resources. However, the use and development of these hot springs have followed very different paths.

The hot spring-based services have been enjoying a revival in many Asian countries. In Japan, tourists visit onsens as part of learning and experiencing about local traditions and heritage. Although the Republic of Korea also has rich traditions and plenty of hot spring resources, the local hot spring-based spa culture (the traditional Korean jimjilbang) has not (yet) been developed much as a tourist product.[39]

Wellness trends in the Republic of Korea focus on healthy Korean food and temple stays in provinces like Gwangju and Jeju focussing their main driving force for wellness tourism on local food.[40]

There are rich hot spring resources in New Zealand, which have been used by the Maori for hundreds of years. These springs in Rotorua, for example, until recently, have been considered as natural features and not as wellness tourism resources. Pilot development schemes appear to want to change this situation in the near future. The few hot spring facilities in Australia aim at predominantly the local market. A few of the relatively underdeveloped and undiscovered hot spring assets of Thailand, Malaysia and the Philippines could attract international demand in the future. Based on the growing demand for natural remedies and wellness, these natural resources can all become more important both in domestic, as well as incoming tourism. A clear indication of such interest was referred to earlier with many of the 13 demonstration zones for health tourism in China aiming to capitalize on the hot spring resources.

Azerbaijan is also developing a strategy for health tourism based on its therapeutic mineral and thermal waters, mud volcanoes and Naftalan oil skin treatments.[41] Armenia is famous in the region for its speleotherapy or cave-based and salt mine treatments for respiratory and lung diseases, as well as its balneology in spa hotels and sanatoria.[42]

Case study 3.8: Japanese onsen

The Government of Japan developed some guidelines for wellness tourism based on the abundant thermal resources and unique bath practices in the country – namely, the traditional Japanese onsen baths. One of the aims was to exploit them more in terms of their economic potential for both local users and tourists. A set of measures was developed to revitalize the onsen areas and facilities. The Government developed a 'Health Japan XXI' programme offering subsidies to the potential users, promoting preventive health care practices within the local population by increasing the utilization of onsen facilities, and developing related accommodation services and complementary activities, mostly those related to physical exercise and healthy living.

In rural Japan, it is thought that the traditional onsen has the potential to constitute an important element of unique and authentic wellness experience development. In the Eastern Hokkaido region of Japan, there are seven onsen areas (Onneyu, Nukabira, Shikaribetsu, Tokachigawa, Utoro, Kawayu, and Akanko). The region has over 300 baths and more than 2000 ryokan or traditional Japanese hotels. The area also offers natural landscapes such as national parks and mountains,, botanical gardens and several museums. The wellness experience is described as one that combines the onsen experiences with natural landscape and culture, including local community heritage.

Note: For additional information please consult: World Tourism Organization and Korea Culture & Tourism Institute (2016), *Case Studies of Traditional Cultural Accommodations in the Republic of Korea, Japan and China,* UNWTO, Madrid, DOI: https://doi.org/10.18111/9789284417407.

Source: Romão, J.; Machino, K. and Nijkamp, P. (2018), 'Integrative diversification of wellness tourism services in rural areas – an operational framework model applied to east Hokkaido (Japan)', *Asia Pacific Journal of Tourism Research,* volume 23, issue 7, pp. 734–746.

Retreats

India has typically been the country and Kerala the state with the most retreat centres for yoga, meditation, spiritual practices and others. Other important destinations include Bali's Ubud and other countries like Thailand are also developing holistic wellness facilities. Authentic health and wellness retreats have been developed in Ko Phangan (e.g., the Sanctuary), Hua Hin (Chiva Som), as well as Chiang Mai (e.g., the Pavana resort) and Samui island.[43] Several temples are offering meditation and silent retreats not only in Thailand but also in the Republic of Korea. Spiritual retreats in Chiang Mai offer a combination of daily meditation practice, the teaching of Buddhist philosophy, walking in silence, breathing, relaxation and mindfulness, Thai massage and healthy vegetarian meals.

Japanese examples can also be identified mentioning the benefits for stressed out workers of visiting retreat centres like Yamanashi, which is 1.5 hours from Tokyo. It is a facility that is specifically designed for improving mental health and includes many relaxation programmes such as exercise, dietary cures, forest therapy, Zen meditation sessions, yoga and occupational therapy on a farm.[44]

Case study 3.9: Yoga retreats in India

India is the birthplace of yoga, one of the main spiritual centres in the world and the epicentre for holistic and retreat tourism. India even appointed a Minister for Yoga and Ayurveda in 2014. In the 2015 draft National Tourism Policy for India, yoga, spirituality and wellness were identified as three of the most attractive sectors for tourism product development. However, it seems that many tourists to India view yoga tourism there differently from spiritual or wellness tourism and that yoga in itself symbolizes specific purposes. Many of the yoga travellers tend to be professional women from developed western countries, increasingly travelling in groups.[a]

Many yoga tourists in India are drawn to the spiritual wealth of the country, including the rich cultural experience, as well as the perceived authenticity of the yoga practice. In Mysore many western tourists go to practise ashtanga yoga, staying between one to six months at the Shri K. Pattabhi Jois Ashtanga Yoga Institute (KPJAYI). There may be around 200 tourists at any time from around 20 countries. Maddox describes how a typical day included ashtanga practice in the morning, brunch at one of the several western-run cafes near the institute, chanting class, an excursion into town to buy fruit or go shopping, socializing at the coconut stand, Sanskrit lessons, an early dinner, and perhaps an evening kirtan or musical performance organized by students.[b]

Rishikesh is considered to be the yoga capital of India. It is visited by thousands of domestic, as well as international tourists every year. It is situated in the foothills of the Himalayas in northern India and is famous not only for its yoga tourism but also for pilgrimage, spiritual and adventure tourism with almost equal numbers of men and women, with the majority aged 45–54.[c]

a) Bowers, H. and Cheer, J. M. (2017), 'Yoga tourism: Commodification and western embracement of eastern spiritual practice', *Tourism Management Perspectives,* volume 24, pp. 208–216, DOI: https://doi.org/10.1016/j.tmp.2017.07.013.

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3.2 Conclusions and recommendations

Overall, it can be seen that international medical tourism is significant in the major hubs in Asia: capital and main cities of Thailand, India, Malaysia or Singapore. Many other Asian countries also offer health-care services to cross-border visitors and increasingly to western patients, too. The region is also significant in terms of its spa development and wellness is becoming an increasingly attractive proposition, both for domestic and international visitors. This is especially true for those countries where wellness tourism has so far been relatively under-developed or is yet unexplored (e.g., China, Japan and the Republic of Korea). This can include domestic, regional and international demand for complementary and alternative therapies and holistic treatments, which may already be familiar to tourists in their own country (e.g., Thai and ayurvedic massages).

Main motivators for medical tourists to an Asian country can be typically one or more of the following trigger points:

- Attractive price;
- State of the art technology;
- Close proximity to home;
- Sound training of health-care staff;
- Familiar culture and/or religion (e.g., halal food, Islamic rules applied in health-care services);[45]
- Partnership with western and United States of America health-care providers;
- Eased medical visa procedures; and
- Wide range of shopping options especially for the accompanying persons.

There are, however, some rather important motivations for health-care providers to take part in international medical tourism. One of the motivations is to create a sound patient case base. Certain illnesses may be relatively rare, therefore local patients may not be enough for a viable economic enterprise. Attracting foreign patients at an affordable rate can improve the patient numbers and, consequently, will improve the treatments as well. Having more patients will decrease fixed running costs and improve return on investment in state-of-the-art technology. Many health-care service providers and organizations look at the digital transformation – the 4th industrial revolution – as a great opportunity including the application of block chain technology or big data-based therapies, or technology-based solutions (mobile health and e-health). The so-called person-centred care based on such innovations will provide new ways and solutions that can help to resolve or even prevent the global challenges societies face due to ageing populations.

Local and authentic traditions appear to be growing in appeal for international tourists, which might include thermal baths in the Republic of Korea, China, Australia and New Zealand, or ayurveda in Sri Lanka. There is also a growing interest in wellbeing and quality of life with long life expectancies and healthy diets in countries like Japan and the Republic of Korea being attractive to international tourists. On the other hand, many Asian tourists may also be attracted to wellness activities because of increasingly stressful working conditions and lack of work-life balance.

Initiatives such as the Malaysia My Second Home (MM2H) Programme may bring in additional demand for health-care related services. MM2H is promoted by the Government of Malaysia and it allows foreigners who fulfill certain criteria, to stay in Malaysia for as long as possible on a multiple-entry social visit pass. The MM2H scheme was opened in 2002 to attract foreigners to come and stay in Malaysia, especially those who have already retired or some for business purposes. The Social Visit Pass issued under the scheme is initially for a period of 10 years but is renewable.[46] The Philippines has also been planning to introduce a similar scheme.

Most resort and hotel developments have a spa or wellness component across the region. Besides the international hotel brands, individual, independent hotels are also increasingly offering both standard, as well as innovative wellness services.

Looking at the future demands of the affluent Asian demand segments in wellness tourism, wellness tourism providers who want to focus on the Asian market should consider the following segments:[47]

- Rise of affluent and solo female travellers who look for retreats and girlfriend getaways especially from China and India: the growth is driven by women being more independent and who appreciate intangible experiences more than men. Destinations that can combine transformative service with excellent shopping opportunities can become very attractive;

- The affluent new agers, who believe that the prime of their life is their middle age years and want to maintain the life-well-lived mindset. For them wellness is way more than just a spa – they can have an impact on medical tourism, too; and

- The affluent Chinese millennials want to offset their health-threatening lifestyle and wellness can become a status symbol for them. They look for wellbeing enhancing trips and services which can include fitness and activity-rich getaways at a hidden location, although these trips very rarely have only one purpose.

The growth in the market will come from young and first-time visitors who are interested in complementary and holistic services that reflect regional traditions. In the rest of the world, baby boomers may lead the charge when it comes to spas, but in Asia they come in third – topping only the pre-war cohorts born before 1946 and generation Z, born between 1996–2012.[48] This has important implications for both spa and wellness design and programming.

The role and involvement of governmental bodies remain important for many Asian countries. However, the longevity of and the development directions in the incoming international medical tourism can be an important issue. The governments' role and intentions may change, the existing bilateral agreements in health care may be discontinued and the local developments in health care in the countries that send their patients to Asian countries may also have an impact on incoming patient numbers and/or specialties sought. One interesting development direction will be to see how the experiences of such organizations and cooperation in medical tourism development can be converted to wellness tourism development, management and marketing.

It is clear that Asian countries are to be considered as generating countries, as well as receiving destinations both in medical and wellness tourism. This is certainly a change to the formerly rather one directional industry development and guest flow. The rich cultural and natural healing traditions and resources, the state-of-the-art health care, as well as IT technology solutions combined with sound support by governmental bodies can mean a bright future in international health tourism and health care in many Asian countries.

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4 Sports tourism in Asia

Tourism and sports are interrelated and complementary. Sports tourism is a vast field and is one of the most dynamic sectors in tourism. Democratization of travel, lifestyle evolution and greater media exposure have led to more and more tourists taking an active interest in sport activities during their trips either as participants or as avid spectators of sporting events. As demand grows, an increasing number of destinations in Asia is developing sports-based tourism as a means to attract new segments, tackle seasonality, boost infrastructure or reinforce their image. Technology is changing the way in which sports is experienced.

The appeal of sports tourism can be illustrated by the following characteristics:

- There are hardly any barriers of language or culture;
- Sports tourism spans almost every demographic;
- Sports tourists may travel beyond the main gateways and in off peak seasons;
- Sports tourism is resilient, as people doing sports are travellers with such specific motivations that they are less likely to cancel or put off their trips; and
- Sport tourists tend to travel again more rapidly following negative events compared to other tourist segments.

4.1 Drivers of sports tourism in Asia

A number of factors have contributed to the growing popularity of sports tourism in Asia:

- **More disposable income and time.** With the rise of the middle class and high-income population, an increasing number of people in Asia can afford to travel abroad with more disposable income and time. Enhanced air connectivity in the region, thanks to low-cost carriers in particular, has increased their travel opportunities and choices;
- **Health consciousness.** People are more health and wellbeing conscious and devote more time to keep active; this is transposed to work and leisure, including travel;
- **Lifestyle.** On one hand, sporting activities are an increasingly relevant part of people's daily lives and they want to keep such lifestyle while travelling. On the other hand, specific sports tourism connects likeminded enthusiasts around a sports activity or event; and
- **Self-development, self-achievement** and **self-discovery** are basic tenets of many Asian religious and spiritual teachings; its extension through sports is reflected in the current popularity of sports tourism.

4.2 Trends in active sports tourism

Sports tourism is often segmented in three categories:

1. **Active sports tourism** where travellers participate in sporting activities that could include major team sports such as athletics, football, basketball, baseball, rugger, cricket or tennis, and others which attract a growing number of adepts to mainly individual events in the form of marathons, walking, cycling, skiing, golf or diving to name a few that are growing in popularity;

2. **Passive sports tourism** where travellers watch sport activities and events such as the Olympic Games, FIFA World Cup, professional football or baseball matches; and

3. **Nostalgia sports tourism** where travellers visit sport-related places such as museums and stadiums.

This chapter focuses primarily on active sports tourism related to individual events.

Trends in active sports tourism

- Sports tourists look for new destinations and locations.
- Adrenaline, extreme, endurance and adventure sports are on the rise for excitement, fun, self-development and self-achievement such as long-distance races, challenging trekking, sky sports and whitewater rafting.
- Sports tourists look for unique sport experiences and events.
- Urban tourists and city breakers also want to experience sporting activities during their holidays.
- More participatory sport events such as marathon races are held, and differentiation is necessary to attract participants.
- Sports tourism is promoted as one of the experiences of the destination, combined with local, natural and cultural resources.
- A wide range of sport activities is offered in destinations. For example, ski resorts now offer snow-shoe hiking and snow mobiles in addition to skiing experiences.
- Sport events with charity purposes are on the rise, as well as the practice of heritage sports tourism, e.g., muay thai, karate and taekwondo.

4.3 Overview of national sports tourism policies

In view of the potential of sports tourism, an increasing number of Asian countries have established specific strategies for its development. Japan, China and Thailand are showcased below.

4.3.1 Japan: sports tourism for regional development

Japan has been very active in promoting tourism and has encouraged the diversification of tourism products, including sports tourism, to attract more international visitors and revitalize regional economies. The Japan Tourism Agency (JTA) established the 'Basic policy on sports tourism development' in June 2011 and set five guiding principles:[1]

1. Development of sports tourism experiences and destinations;

2. Bidding and hosting of international sport competitions;

3. Development and promotion of sports tourism products;

4. Human resource development for sports tourism; and

5. Establishment of a nationwide organization to promote sports tourism. In consequence the Japan Sports Tourism Alliance was established in April 2012.

The Japan Sports Agency set the 'Strategy for enlargement of sports tourism demand' in March 2018.[2] It articulates three areas for action:

1. Enhance the awareness of sports tourism potential, content development and tourism reception in the regions;

2. Enhance the collaboration among national and regional governments, private businesses and other organizations; and

3. Promote sports tourism in collaboration with the public and private sectors.

The Strategy also points out that outdoor sports (skiing, hiking, walking, cycling, etc.) and Japanese martial arts (karate, sumo, etc.) have potential for domestic and inbound sports tourism.

In March 2016, the Japan Tourism Agency, the Japan Sports Agency and the Japan Culture Agency signed an agreement to develop and promote "sport culture tourism".[3] Since then the three agencies have held the 'Sport Culture Tourism Symposium' along with the 'Sport Culture Tourism Awards' each year. Regional development at the time of an aging society and declining population has been one of the main priorities in the government agenda and the three agencies see a great potential to revamp the regional economy through promoting tourism combined with sport and culture.

4.3.2 China: boosting domestic sports tourism

In China, people's rising health consciousness and consumption shift to lifestyle experiences have brought about a sports tourism boom. According to a survey[4] on most popular outdoor activities in China, hiking, mountain climbing and cycling are the most popular activities followed by rafting, skiing, rock climbing and ice skating while marathons draw millions of runners to host cities. Diving, parachuting and surfing are also gaining popularity.

The *Outline for National Tourism and Leisure (2013–2020)* was established in 2013 "to meet the people's growing needs in tourism and leisure, promote the healthy development of the tourism and leisure industry, and build a Chinese-style national tourism and leisure system".[5] Sports and fitness tourism was mentioned as one of the tourism products that should be vigorously developed for the diversification of the tourism sector.

In December 2016, the National Tourism Administration and General Administration of Sport jointly issued a document to define the national strategy for the development of sports tourism. It is envisaged to develop 100 sports-themed destinations and 100 quality sports events by 2020. Beijing aims to generate a total of 1 billion domestic and foreign tourist visits annually for sports tourism.[6]

China also announced a Belt and Road Sports Tourism Development Action Plan 2017–2020[7] in July 2017 aiming at accelerating the collaborative development of sports and tourism in China and countries along the Belt and Road Initiative (BRI), and building tourism brands through the development of premium sports tourism events, sports tourism products and sports tourism destinations. Twenty sports tourism cities and 100 sports tourism demonstration bases will be developed and China will also strengthen the intellectual support of sports tourism by, for example, encouraging academies to offer sports tourism majors and building a sports tourism statistical system.

The Beijing Winter Olympics and Paralympic Games in 2022 are expected to further develop sports tourism as a tourism and health strategy.[8]

4.3.3 Thailand: hosting of international and regional sports events

Thailand has been developing sports tourism with a focus on sport events, year-round sport activities and sports training destinations, and promoting Thailand as the ultimate destination for sports tourism in Asia.

Sports tourism is included in *The Second National Tourism Development Plan (2017–2021),*[9] launched in March 2017, and in Thailand Tourism Vision towards 2036 aiming at promoting "Thailand as leading regional travel destination that targets high potential segments such as sports tourism along with the meetings industry, gastronomy tourism and shopping tourism". In the area of sports tourism, Thailand's objectives are "to raise more income from existing sports infrastructure and use sports tourism to help promote awareness and interest in sports and exercise among Thai population". The sports initiative recommends three actions:

1. To develop a wider variety and availability of end-to-end sports packages, especially in already popular sports such as Thai Boxing;

2. To establish Sport Cities with proper financial incentives to attract investments from the private sector. Sport Cities should encompass international standard sport facilities both for professionals and recreation players; and

3. To become the host for international sports events, especially in Sport Cities. Province-level and national-level initiatives to host domestic and international sports events, such as Asian Games or Southeast Asian Games, can generate higher traffic, attract additional income and foster fan loyalties.

The Amazing Thailand Tourism Year 2018 featured 36 sport-related international events and conferences including Air Race 1, Moto GP, Amazing Thailand Marathon Bangkok, and SportAccord Conference.[10]

4.4 Mega sport events and tourism

Mega sport events such as the Olympic and Paralympic Games bring various positive impacts on tourism of the host city or nation. An increase in visitor arrivals and spending during the event is expected in the first place. However, the benefits of a mega sport event are not limited to one-off, short-term impacts. They can – and should – also have mid- to long-term effects as a catalyst for development and change. These benefits and impacts are now called legacy. But the event will not automatically bring about a lasting legacy. To gain the maximum benefits from it, leveraging a strategy is necessary. The tourism sector should take advantage of the event for long-term tourism development.[11]

In Asia, three consecutive Olympic and Paralympic Games were or will be held: (i) the PyeongChang Winter Games 2018; (ii) the Tokyo Summer Games 2020 and (iii) the Beijing Winter Games 2022. Each country's tourism authority aims at making the most of the Games for tourism development.

Case study 4.1: PyeongChang 2018 (Republic of Korea)

The 2018 PyeongChang Olympic and Paralympic Games were held in the Gangwon Province in the north-east of the Republic of Korea. The area had been domestically well known as a winter destination, but not so much internationally. The Winter Games presented a great opportunity to promote the province and its attractions to the world in order to make it a 'Winter Sports Hub in Asia'. Peace was very much in the core message for this edition of the Games. The Republic of Korea set as objectives to increase domestic visitors to the province from 100 million in 2013 to 140 million in 2018 and international visitors from 1.9 million to 40 million in the same period.

There were three key strategies:

1. To promote attractive tourism programmes, for example through the internationalization of the Gangwon Province cuisine;

2. To develop a global marketing strategy such as the 'Visit Korea Year'; and

3. To improve accommodation management with various hospitality programmes such as the 'K-smile Campaign'. The Korea Tourism Organization (KTO) carried out the 'K-smile Campaign' from 2015 in the lead up to the Games in order to promote and establish the culture of hospitality in the country under the slogan of "If Korea laughs, the World laughs". The campaign aimed at improving the attitude of Koreans towards visitors and encouraging them to be hospitable to tourists. The KTO also promoted winter sports tourism contents with the Games at various tourism fairs and other events.[a]

One of the most important tangible legacies of the Games on tourism is the development of two expressways and a high-speed railway (KTX) that connect Seoul and the Gangwon Province. The new KTX significantly reduced the travel time to reach the province and made the region's mountains and beaches easily accessible. This allowed the province to become an Asian winter sports hub and also represented a good opportunity for the country to disperse international visitors beyond Seoul. A drawback of the shorter travel time is the decrease in overnight visitors since the venue also became a day trip destination. However, in Gangneung City's case, "the higher hotel categories registered positive momentum, mainly from the higher spending demand profiles"[b].

Most of the Olympic venues are maintained for sport competitions, training and public use and helped the host region to become a winter sports hub for locals and overseas visitors alike. The PyeongChang Memorial Foundation, using the surplus of USD 55 million generated by the Games, manages and operates these venues based on an agreement between the Ministry of Culture, Sport and Tourism and the authorities of Gangwon Province.[c]

PyeongChang 2018 introduced the latest technologies such as 5G services, augmented reality (AR) and robots in order to show athletes' movement from 360° angles, and provided automatic translation services and spectator guides. These new features are expected to enhance sports tourism experiences in the future.[d]

a) The PyeongChang Organizing Committee. 23, 2018 (2016), *Olympic Games Impact (OGI) Study for the 2018 PyeongChang Olympic and Paralympic Winter Games,* p. 315 (online), available at: https://library.olympic.org/ (20-08-2019).

b) Voellm, D.J. and Yoo, J. (2018), *'South Korea Overview – Opportunity: High-Speed Rail and Winter Olympics',* HVS, Hong Kong (China), p. 8.

c) Olympic.org (2019), *One year on, legacy vision for Pyeongchang 2018 venue is taking shape* (online), available at: www.olympic.org/news/one-year-on-legacy-vision-for-pyeongchang-2018-venues-is-taking-shape (04-07-2019).

d) Solid State Ionics (n.d.), *The Legacy of PyeongChang 2018* (online), available at: http://ssi-22.org/?page_id=125http://ssi-22.org/?page_id=125&ckattempt=1 (05-07-2019).

Case study 4.2: Tokyo 2020 (Japan)

The Japanese Government made concerted efforts over the years to develop tourism (in particular inbound tourism) in Japan. These efforts have been reinforced since the Government with the Japan Tourism Agency as the main tourism organization set up a Ministerial Council headed by the Prime Minister to develop a tourism-oriented nation in 2013 and published a Tourism Action Programme, which is updated annually.

After Tokyo won the bid to host the 2020 Olympic Games in September 2013, the Programme was already drafted considering how to utilize the 2020 Olympic Games and what to achieve by 2020. The latest Programme, updated in June 2018, presents specific actions to be executed by various departments of the Government, including:[a]

– Opening attractive public buildings, facilities and venues for tourism purposes;

– Enhancing multilingual information of cultural resources;

– Branding national parks as tourism destinations;

– Introducing new tourism products such as night time entertainment;

– Expediting immigration process utilizing latest technology; and

– Enhancing the capability of regional destination management organizations (DMOs).

The Action Programme specifically mentions the Olympic Games in the following items:

– Enhancing sport watching experiences for visitors;

– Showcasing the revitalization of the Tohoku Region heavily damaged by the Great Eastern Japan Earthquake and the tsunami in 2011;

– Enhancing tourism promotion overseas to take advantage of the Games, especially in the European, American and Australian markets;

– Promoting tourism in combination with sports and culture (both active and watching sports);

– Enhancing the Disaster Prevention Portal in order for international travellers to be provided necessary information in case of a disaster;

– Enhancing multilingual communication in transport, restaurants, accommodation and retail;

– Improving the reception of business jets at airports in Tokyo; and

– Establishing guidelines to use cruise ships to accommodate visitors to the Games.

The Programme stresses enhancement of universal design in and around tourism leading up to the Games such as accessible and seamless transport system, training programmes for service providers, and raising awareness of accessibility standards.

a) Ministry of Land, Infrastructure, Transport and Tourism, Japan (2018), 観光ビジョン実現プログラム 2018 ー世界が訪れたくなる日本を目指してー（観光ビジョンの実現に向けたアクション プログラム 2018）(online), available at: www.mlit.go.jp/common/001238097.pdf.

Case study 4.3: Beijing 2022 (China)

Beijing will host the 2022 Winter Olympic Games. China also launched its Winter Sport Development Plan to significantly increase winter sport players from around 12 million to 300 million by 2025. The Plan unveils its intention to build 800 ski resorts by 2020, the current number being around 700.[a] It represents a golden opportunity for winter sport resorts in China and many resorts are being developed following the Government's policy.

China's Five-Year Tourism Plan[b] (2016–2020) by the State Council listed winter sports tourism as an important segment. Accordingly, Xinjiang Uygur autonomous region, Inner Mongolia autonomous region, Heilongjiang province and Jilin province established detailed plans to pursue the potential of winter sports tourism and the economic benefits of winter tourism have already started to materialize.

The Chinese Government issued the 'Guidance on Taking the 2022 Beijing Winter Olympics as an Opportunity to Develop Winter Sports' in March 2019.[c]

a) Xiaochen, S. (2018), 'Winter sports industry turning cold into gold', *The Telegraph,* 15-02-2018 (online), available at: www.telegraph.co.uk/news/world/china-watch/business/chinese-winter-sports-industry-grows/ (05-07-2019).

b) Central Compilation and Translation Press (2016), *The 13th five-year plan for economic and social development of the People's Republic of China (2016–2020)* (online), available at: http://en.ndrc.gov.cn/newsrelease/201612/P020161207645765233498.pdf.

c) China Internet Information Center (2019), *China takes advantage of Beijing 2022 to develop winter sports* (online), available at: www.china.org.cn/sports/2019-04/01/content_74632222.htm.

4.5 Local sport events and tourism

Mega sport events are a golden opportunity for tourism development, but not all destinations can afford or want to host one. Therefore, local sport events such as walking activities, marathons, cycling races, surfing competitions and school sport events are a good means for tourism development and a more beneficial tool for smaller destinations:

- They do not require considerable investment as they utilize existing infrastructure;
- They bring positive impacts such as increased visitors, economic benefits, destination image building and community rejuvenation – although the impacts may be smaller than those of mega events;
- They have less negative impacts often associated to big events on residents and the host community such as disruption of daily life, increased traffic and noise, environmental degradation and heightened security measures;
- They attract incremental visitors without causing displacement, crowding out and too much price hike;
- They can be recurring events and continue to generate positive impacts every time they are held; and
- For the above reasons, they can be more manageable and sustainable.

Destinations can use local sport events to develop or diversify tourism products and services that make the best use of their own existing resources and competencies, and enhance the overall tourism experience. However, as in the case of big events, tourism benefits can be realized only when a destination plans and organizes the event with a strategy to leverage it for tourism development. It is critical to choose the right event, strategically integrate the event in the destination tourism plan, enhance overall customer experiences and involve all stakeholders.

4.6 New opportunities

4.6.1 E-sport events and tourism

E-sport stands for "electronic sport" and means competitions in computer and video games. The e-sport market has been rapidly growing in recent years:[12] The revenue of the e-sport industry is expected to grow from USD 655 million in 2017 to USD 1,790 million in 2022; the e-sport audience was of 335 million in 2017 and is expected to reach 645 million in 2022. China will have the highest number of e-sports enthusiasts[13] in 2019 with 75 million. In 2018, there were 737 major events with a total of USD 54.7 million in ticket revenues.

Hosting an e-sport event brings the same benefits as other events. International e-sport events are broadcasted worldwide to a wide audience and high exposure of the destination can be expected: they draw media attention, can raise awareness of the destination and position it in association with e-sport's values such as fun, youth, technology and innovation, thus attracting new segments.

E-sport events can also be used to ease seasonality, as they can be held at indoor venues at any time of the year and destinations can host it strategically during its off-peak season.

In addition, hosting e-sport events can help to attract skilled technology workforce to the destination. Enhancing and expanding high-tech industry bases in a destination can be a strategy to increase business travels and the meetings industry which can be combined with e-sport events.

Case study 4.4: Leading the hosting of international e-sport tournaments (Republic of Korea)

The Republic of Korea has been leading the way in this field. Computer games have been very popular and one of the first major e-sport competitions, the World Cyber Games Challenge was held in the country in October 2000. Since then, many e-sport events have been hosted in the country.

Seoul promotes e-sport as one of its major tourism attractions. Seoul e-Stadium is the largest e-sport stadium[a] in the country and hosts various e-sport tournaments. In the same building, the e-Sports Hall of Fame displays the development and history of the country's e-sport and the memorabilia of star players while offering a variety of experience programmes.

Busan has long been a major tourist city in the country known for its history, culture and fresh seafood. The city now presents itself also as a contemporary, high-tech destination through hosting e-sport events and an international film festival. These changes or additions in the destination image are beneficial to destinations because they now can reach out to new segments of tourists, diversify its markets and products and enhance its overall attractiveness and competitiveness.

The Ministry of Culture, Sports and Tourism announced the project to build up to three new e-sport facilities by 2020 and the possible expansion of the existing sport facilities to make them more suitable to include e-sport so that the country could strengthen its position as the main hub of e-sport.[b]

a) Visit Seoul (2018), *Everything about eSports! 'Seoul e-Stadium* (online), available at: http://english.visitseoul.net/tours/Everything-about-eSports-Seoul-e-Stadium_/26702 (05-07-2019).

b) 'Korean government will build three new esports stadiums' (2018), *VIE Sports,* published 9 August 2018 (online), available at: http://vieesports.com/korean-government-will-build-three-new-esports-stadiums/ (04-07-2019).

Case study 4.5: Attracting new visitor segments (Malaysia and Hong Kong, China)

Malaysia has already held big e-sport events (ESL Genting and Dota 2 Kuala Lumpur Major) and aims to attract youth from ASEAN countries that can learn about the country and visit Malaysia more than once.[a]

Hong Kong (China) has also been exploring the potential of e-sport to attract young visitors. The Hong Kong Tourism Board (HKTB) inaugurated in 2017 the ICBC (Asia) e-Sports & Music Festival Hong Kong at the Hong Kong Coliseum with over 60,000 participants in three days. The Festival consisted of an e-sport tournament and a concert of K-pop's top stars. The three matches of the tournament were live-streamed in six languages and viewed by 7 million people worldwide.

a) 'ESL One Genting returns to Malaysia as official Dota 2 Minor, features a $US400,000 prize pool and The International 2018 Qualifying Points', *ESL Gaming,* published 17 October 2017 (online), available at: www.eslgaming.com/press/esl-one-genting-returns-malaysia-official-dota-2-minor-features-us400000-prize-pool-and-international-2018-qualifying-points (05-07-2019).

Shen, Y. (2019), 'Malaysia To Draw Up Blueprint For eSports; To Be Ready By April 2019', *Lowyat,* 20-03-2019 (online), available at: www.lowyat.net/2019/181007/malaysia-to-draw-up-blueprint-for-esports-to-be-ready-by-april-2019/ (05-07-2019).

'E-sports can boost tourism sector, says Syed Saddiq' (2018), *Malaymail,* published 16 November 2018 (online), available at: www.malaymail.com/news/malaysia/2018/11/16/e-sports-can-boost-tourism-sector-says-syed-saddiq/1694266 (05-07-2019).

4.6.2 New technologies

Innovation and technology are key to enhance the customer journey before, during and after travel. Benefits for tourists include convenience, personalization/curation and more engaging/immersive/exciting experiences. It also helps improve management and operation of tourism suppliers. Sports tourism is no exception and there are many possibilities to utilize technology such as information and communication technology (ICT), mobile applications, Internet of things (IoT), virtual reality (VR), augmented reality (AR) and artificial intelligence (AI), including facial recognition, chatbots and robots to increase the competitive edge of sports tourism.

Innovation and technology in sports

1. **Enhanced customer experience in watching sports:**

   With technology development, audience at the venue can watch sports in more engaging ways than before. For example, audience can:

   - Display timely replays of decisive moments or slow motions of quick plays with higher resolution images;
   - Display the game from various angles and viewpoints;
   - Timely display related data of players, techniques and games; and
   - Participate in a more exciting way by use of drones.

2. **Enhanced customer experience in active sports:**

   Technology and innovation can add value to existing sport experiences and the following elements can be a powerful tool to attract sport fans to a destination or a sport event. For example:

   - Visualization of body and equipment (balls, rackets, etc.) movement by using sensors and cameras attached to body and equipment so that participants can improve their performances; and
   - Automatic recording of physical conditions (such as the number of heartbeats or breaths) and results by using wearable devices.

3. **Creation of new experiences by using technology:**

   Sport experiences can be created or evolve by the use of various technologies. For example:

   - Gears that help people with disabilities enjoy sports;
   - VR-augmented existing sports (bouldering in VR wilderness or e-sport in VR fantasy);
   - Adding game nature to walking and running (such as Pokemon Go); and
   - Invention of urban and cool new sports

   Sport museums and stadium tours can create new experiences to make the visit much more engaging and entertaining with interactive exhibits than just explanatory boards and a display of memorabilia. This will help bring displays to life, expand the customer base and increase repeat visits.

4. ***Smartization* of sport venues (stadia, arenas, ski slopes, sport museums, etc.):**

   Applications, sensors, AI and mobile/wearable gears (e.g., bracelet) can be utilized for the benefits of visitors in the venue other than sport watching itself such as ticketing, entering the venue, purchasing and other activities there. These services can be extended outside the venue (nearby hotels, shops and restaurants or even the venue-centered area as a whole).

   Not only do they help make visitor experiences stress-free, but also manage visitors' movements, improve operation (e.g., reduction of crowdedness and length of queues), and collect and utilize visitor data for marketing and promotion.

4.7 Product development

Travellers demand more diversified, new, unique, authentic sport experiences during their trips. Destinations and tour operators need to offer products that meet these demands to remain competitive.

4.7.1 Unique marathon events

Marathons are booming as people are more health conscious and running fits their own lifestyle. Many people start running in their 30s or 40s when they start being serious about their health or weight. This age bracket means that marathon runners have a comparatively higher spending power.

With this boom as background, many marathon events are held in Asia. For a destination, marathon events are a good opportunity to attract visitors, create economic benefits and promote the destination, but they also encourage its citizens to run for their own health and cheer for entertainment. There are many traditional marathon events throughout Asia either in big cities, regional cities or in the countryside. However, there are also more and more marathon events with special characteristics and it is not uncommon that profits from the events proceed to local sport, education or conservation programmes.

Case study 4.6: Tohoku Food Marathon and Festival – combining sports with gastronomy (Miyagi, Japan)

This event started in 2014 with 1,300 runners and reached 6,800 in 2018. The total number of participants (including the festival) also increased – from 15,000 in 2014 to 53,000 in 2018. The idea came from the Medoc Marathon in France in which runners are offered famous local wines, oysters and cheeses at water stations along the course. In the Tohoku Food Marathon, local food is offered in the same way. In addition to the marathon, events of local food and sake, and a pre-marathon event, the 'Tohoku Food Night', are held back to back. The latter features performances of local traditional entertainment, programmes for kids and relaxing sport activities for everyone, including seniors and people with disabilities. It is estimated that the economic impact of the event was around JPY 300 million (some USD 2.8 million) in the region in 2018. About 47% of the visitors came from outside of Miyagi Prefecture and 4% came from abroad. The organizer's vision is "to connect Tohoku and the world by marathon". The key to success is offering a special occasion to attract first timers and entice repeat visits, and involving local people. The organizers collaborates with major travel agencies to promote packages to the event.[a]

a) Tokohu Food Marathon and Festival 2019 (online), available at: http://tohokumarathon.com/en/.
Diamond online (online), available at: https://diamond.jp/articles/-/184849.

Case study 4.7: Hard marathon events – combining sports with heritage

Runners like challenges. Some marathon events appeal to this need. The Great Wall Marathon (China) started in 1999 and is considered one of the world's most challenging marathons, attracting around 2,500 runners from all over the world.

The Everest Marathon (Nepal) calls itself the highest and most adventurous marathon in the world since it starts at the Mount Everest base camp (5,356 meters) and passes through the historical route by Tenzin Norgay Sherpa and Sir Edmund Hillary.[a]

a) Great Wall Marathon (online), available at: https://great-wall-marathon.com/.
Everest Marathon (online), available at: http://everestmarathon.com/.

4.7.2 Cycling tourism

Cycling tourism is also on the rise in Asia among health and environment conscious travellers. More people ride bicycles in their daily life for sport, commuting, getting around the town or for fun, as a convenient, quick, clean and healthy option. Nowadays, bike lanes have been developed in many urban areas as part of health, environment, safety and overall transport policies. Once people realize the enjoyment of biking, they start to think about riding a bike during their trip or even a cycling holiday. In addition to cycling programmes (with or without a guide), many accommodations provide bikes for rent. Cycling as a shore excursion during a cruise and rental car with bike carriers are also emerging.

One reason for the popularity of cycling tourism is that tourists can see the daily life of local people from a different angle at slow speed and directly feel the atmosphere of the destination (see, hear and smell). It is an immersive, authentic experience with direct encounters with the locals and it is not so hard and slow as walking for a long time. Like marathonists, cyclists get a feeling of accomplishment, companionship, and healthy lifestyle in their activities.

There are mainly two kinds in cycling tourism experience: cycling in the city or town (half day to one day) that almost anyone can participate as one of the ways to tour the city, and long rides or cycling tours through wider areas (2–10 days) for more serious bike lovers.

Case study 4.8: South-East Asia

Across South-East Asian countries, the number of tour operators offering private-guide cycling tours is growing. Popular routes and areas for cycling include:

- Angkor Wat (Cambodia);
- National Highway 1 (Viet Nam);
- From Bangkok to Phuket (Thailand);
- From Hanoi (Viet Nam) to Luang Prabang (Lao People's Democratic Republic); and
- From Siem Reap (Cambodia) to the island of Koh Kood in the Gulf of Thailand (Thailand).

These tours attract cyclists worldwide as they offer amazing landscapes, sometimes challenging terrains, local food, rich cultural and historical backgrounds and friendly local people.

Case study 4.9: Satoyama Cycling (Gifu, Japan)

Satoyama in Japanese means rural natural area close to villages. Satoyama Cycling is a name of an activity programme where travellers ride on a bicycle lead by a guide. It gets very high satisfaction scores on various tourism websites and there is a virtuous cycle that good word of mouth leads to more tourists. It is a three and a half hour leisurely cycling tour through the countryside, rice paddies, agricultural villages and markets along with a view of mountains. It is accompanied by an experienced guide who talks about local culture and history. During the tour, participants can talk with farmers and are warmly greeted by residents. They may even be invited to home for tea. The guide also introduces quality local products for purchase. Colourful designer bicycles are used.

This programme meets the travellers' needs to experience firsthand the local culture, lifestyle and scenery in a healthy, environmentally friendly and active way. The key to success is to share with the residents the value of local resources and tourism and to get understanding and cooperation.[a]

a) Hida Satoyama Cycling (online), available at: https://satoyama-experience.com/cycling/.

Case study 4.10: Shimanami Kaido Cycling Route (islands in the Seto Inland Sea, Japan)

Shimanami Kaido is considered one of the most impressive cycling routes in Japan and in the world. It is a scenic bike and pedestrian lane attached to the expressway (segregated from the highway for the part of high bridges with panoramic views) with a length of 60 km linking six small islands in the Seto Inland Sea between two of the four main islands of Japan, Honshu and Shikoku. It is a smooth and easy ride, suitable for everyone including family with kids. It can be completed in a day, but bikers can spend days stopping by at the islands at a slower pace. Rental bike stations are available along the way and at both ends of the route and bikers may terminate the ride and take a bus for the rest of the route.

A local DMO, Shimanami Japan, develops and promotes area-wide tourism in collaboration with the private sector with the aim of regional economic revitalization. It also involves the locals and shares the cycling culture that also gives them opportunities for health and friendship. Public relations efforts are also important.[a]

The bi-annual Cycling Shimanami event has been held since 2014 where the expressways are open only for the event bikers (and no cars are allowed during the event). In 2018, it attracted more than 7,000 participants and 45,000 event comers that brought in the direct economic impacts of JPY 396 million (around USD 3.7 million) according to the local economic think tank.[b]

a) Shimanami Japan (online), available at: https://shimanami-cycle.or.jp/go-shimanami/.
Clyclo Shimanami (online), available at: www.cyclo-shimanami.com/english.php.

b) Nikkei (2019), しまなみの自転車大会、18年の経済効果は9億円超 (online), available at: www.nikkei.com/article/DGXMZO42981300X20C19A3LA0000/.

4.7.3 Walking tourism

Walking tourism is now one of the most popular ways to experience a destination. It allows tourists to engage more with local people, nature and culture. Walking tourism can be developed anywhere as a sustainable tourism offer with relatively small investment. Since walking is attractive not only to visitors but also to residents to maintain and enhance their wellbeing, a destination can also consider it part of its welfare policy and promote the interaction between visitors and residents.

Even though walking tourism can be developed anywhere, a destination needs to think about its potential depending on its objectives and target segments (from casual walkers to serious hikers). The development of walking tourism should consider the following key elements:

- Route characteristics (attractiveness, safety, level of difficulty, access);
- Necessary facilities (signage, toilets, benches, etc.);
- Maintenance systems;
- Economic opportunities (accommodation, transport, retail, cultural programmes, links to gastronomy and wine tourism, etc.); and
- Marketing and commercialization.

Demand for *experiencing* a destination in an authentic way and the growing popularity of active tourism makes walking tourism more and more relevant for both destinations and travellers. Walking travellers are also likely to appreciate local culture and nature, and walking tourism can be a good opportunity to showcase a destination as a whole beyond walking activities. Therefore destinations can make the most out of the value of walking tourism for their tourism development.[14]

Case study 4.11: Jeju Olle Trail (Republic of Korea)

The Jeju Olle Trail, a circuit around Jeju Island, a volcanic island one and half hours from Seoul by air, is now one of the most popular tourist attractions of the island. *Olle* means a narrow path between the street and the doorstep of a house in the dialect of the island, but now it is known as a general term for hiking. Olle is very well recognized in the Republic of Korea and attracts many repeat visitors regardless of age and gender.

The Jeju Olle Trail includes a series of trails almost circumnavigating the island with a total length of 425 km. It consists of 21 main routes along the coast running through farmlands, tea plantations and forests, and five sub routes in the interior and neighbouring small islands. Each route runs for 10 to 20 km and requires around three to seven hours for a walker to complete. The key elements of the Jeju Olle Trail are the following:

- Use natural footpaths and avoid roadways;
- Link villages where walkers can experience local culture and nature, and interact with people;
- Do not use artificial materials;
- Maintain original natural and living landscapes;
- Enjoyable not only under the sun, but under rain or wind;
- Enjoyable for everyone;
- Can be developed and maintained by local residents; and
- Brings about economic benefits to local enterprises and residents.

The Jeju Olle Trail is managed by the Jeju Olle Foundation, which is basically self-financed with donations and sponsorships without government grants and subsidies. In addition to the donations, the Foundation earns money from sales of original souvenirs, food and drinks, and services. These original products are sold at the Jeju Olle Tourist Center, at shops in villages and online. It contributes to job creation for local communities. Maintenance of the trail including cleaning paths and repairing signs is carried out in cooperation with volunteers and residents so that cost is minimized. Volunteers also play an active part in guiding visitors and organizing events.[a]

a) World Tourism Organization (2019), *Walking Tourism – Promoting Regional Development,* UNWTO, Madrid, DOI: https://doi.org/10.18111/9789284420346.

4.7.4 Sports tourism in cities

Many tourists also want to keep fit while travelling to cities for leisure or business. To cater for such demand, many hotels offer gym and fitness facilities and activities, some with personal trainers and some even in the hotel room. Rental bikes are available and jogging and running maps of the area are also increasingly provided. Sports tourism is also promoted in destinations usually considered as urban destinations such as Hong Kong (China) or Macau (China). Long considered as destinations for dining, shopping and entertainment, but these cities have introduced sports tourism to court sport lifestyle tourists and to diversify their tourism offerings.

Case study 4.12: Water sports in Macau (China)

The tourism vision of Macau (China) is to turn Macau into a World Centre of Tourism and Recreation, as defined in the 'Macao Tourism Industry Development Master Plan' (2017), a blueprint for the next 15 years. One of the eight key objectives of the Plan is to "diversify tourism products and experiences" and under this to "introduce marine tourism products". It is recognized that Macau has a substantial opportunity in marine tourism as a coastal city. Macau now promotes two grand beaches for swimming, canoeing, windsurfing, sailing and jet-skiing.[a]

a) Macao Government Tourism Office (2017), *Macao Tourism Industry Development Master Plan* (online), available at: https://masterplan.macaotourism.gov.mo/home-en/index.html and http://en.macaotourism.gov.mo/showentertainment/showentertainment.php?c=4.

Case study 4.13: Hiking in Hong Kong (China)

Hong Kong (China) is one of the most visited cities in the world. Leveraging its rich natural environment not only in Hong Kong Island and Kowloon but also in the North East New Territories and outlying islands, Hong Kong (China) has been promoting green tourism including hiking trails to broaden its tourism appeal and to entice different visitor segments.

The Hong Kong Tourism Board (HKTB) launched the 'Great Outdoors Hong Kong!' promotion in 2009. It published a guidebook so that visitors, fully independent travellers in particular, could plan hiking trips at their own pace. Developing green tourism in the outlying islands has been considered not only to diversify a portfolio of tourist attractions and enhance the city's attractiveness to overseas visitors, but also to appeal to local residents. Along with HKTB's promotion overseas, the Home Affairs Department (HAD) and the Agriculture, Fisheries and Conservation Department (AFCD) played their roles in improving infrastructure, promotion, visitor services and education. The experience now meets the needs of the visitors who seek a deeper understanding of the city's natural environment including biological and geological diversity.

The HKTB has continued to promote hiking trails recognizing that hikers tend to stay longer and benefit local business and that hiking trails are photogenic places for sharing on social media. The HKTB sees that one of the city's competitive advantages to other popular hiking destinations lies in easy access to trails by public transport from downtown.

4.8 Sports tourism and the Sustainable Development Goals (SDGs)

Tourism can contribute to sustainable development and the achievement of the 17 Sustainable Development Goals (SDGs) if properly developed and managed. Sports tourism also can help achieve sustainable development.[15] The comparative strength of sports tourism lies in:

1. The engagement in physical activities;
2. The opportunities for interactions; and
3. Its high development potential almost anywhere (small events or light activities like walking in particular).

Thanks to these characteristics, sports tourism can play an important role in achieving various SDGs. In particular:

- **SDG 3 – Ensure healthy lives and promote well-being for all at all ages:** Sports tourism enhances the wellbeing of tourists and welfare of the locals.
- **SDG 5 – Achieve gender equality and empower all women and girls:** Sports tourism provides jobs and income opportunities for women. Female athletes participating in sports tourism and events can be an inspiring role model for local women.
- **SDG 8 – Promote sustained, inclusive and sustainable economic growth, full and productive employment and decent work for all:** Sports tourism provides jobs and income opportunities and economic benefits from increased visitor spending in diverse areas of the territory.
- **SDG 11 – Make cities and human settlements inclusive, safe, resilient and sustainable:** Accessible sports tourism products (e.g., hand bikes) provide people with disabilities, both residents and visitors alike, with opportunities for sport. Development of accessible sports tourism can improve general accessibility in the destination by provision of not only such tourism products but also accessible accommodation and transport. Using bicycles as a means of transport for tourists reduces their carbon footprint in cities.
- **SDG 15 – Protect, restore and promote sustainable use of terrestrial ecosystem and halt biodiversity loss:** Nature-based sports tourism enhances the awareness of nature's value and the importance of its protection, while encouraging environmental preservation among travellers, locals and the tourism industry.
- **SDG 17 – Strengthen the means of implementation and revitalize the global partnership for sustainable development:** Sports tourism provides encounters between people of diverse cultural backgrounds from all over the world. It fosters friendship and mutual understanding, laying the foundation of more peaceful societies.

Case study 4.14: Cave Trekking (Viet Nam)

Cave Trekking, run by the local adventure caving company Oxalis Adventure Tours in the UNESCO Natural World Heritage area of Phong Nha, is an example of the commitment of a private sector company to sustainable community tourism development through the implementation of friendly practices and the employment of local workforce.[a] The popularity of caving has been growing among adventure tourists worldwide and so has Oxalis.

Environmental conservation and environmentally friendly practices are key for sustainable sports tourism development. Strict paths are set in the caves so that erosion is kept minimum and delicate formations are protected. Composting toilets are set up in camping sites. Regular environmental impact assessments are conducted to make sure that there are no negative impacts to the surrounding rivers. No tours are operated for several months each year so as to leave a "rest" period to caves.

Indirectly, Oxalis' success has additionally contributed to environment maintenance since many of its employees no longer need to be involved in logging or hunting in the national park, as thanks to tourism they are provided with a regular income.

a) Oxalis (online), available at: https://oxalis.com.vn/.

Case study 4.15: Profits for a good cause (Bhutan, Mongolia and Cambodia)

The Bhutan International Marathon passes through temples, monasteries, rice paddies, villages and chortens (pagodas) and ends at Punakha Dzong (the palace of bliss). All profits go to support Bhutan's youth and Olympic programme.

Profits of the Mongolia Sunrise to Sunset Marathon held around Hovsgol National Park go to preserve the national parks in Mongolia.

Angkor Wat International Half Marathon has a purpose to encourage and give hope to the victims of antipersonnel mines in Cambodia and proceeds help providing prosthetic limbs, social integration programmes and other relevant projects.

a) Bhutan International Marathon (online), available at: http://bhutaninternationalmarathon.com/.
b) Mongolia Sunrise to Sunset (online), available at: www.ms2s.org/.
c) Cambodia Events Organizer (n.d.), *Angkor Wat International Half Marathon* (online), available at: www.cambodia-events.org/angkor-half-marathon/.

4.9 Conclusions

Sports and tourism complement each other. Sports tourism has a potential to any destination not only through the organization of mega sport events but also thanks to the increasing demand for active holidays. The need to experience a destination in an authentic way and the growing popularity of active tourism make sports tourism more and more relevant for both destinations and travellers.

Particularly Asian destinations have shown a strong development in sports tourism as illustrated in the different case studies included in this chapter. Their unique natural and cultural assets, as well as careful planning have largely contributed to the success of the many initiatives taken in the development and practice of active tourism, involving local communities and helping to achieve the SDGs.

On the other hand, Asia's leadership in technological advances is reflected in the rapid growth of e-sport and other sport smart modalities, attracting new visitor segments and generating additional business opportunities.

Asia is also becoming the theatre of mega events: the Summer 2020 Olympic Games to be held in Tokyo, Japan, or the Beijing 2022 Winter Olympics will give an even higher profile to the region.

Innovation, product development, partnerships and effective destination management will be key in order to make the most out of the enormous economic and social potential from sports and tourism.

Chapter 4 Endnotes

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12 Newzoo (2019), *Newzoo Global Esports Market Report 2019* (online), available at: https://newzoo.com/insights/trend-reports/newzoo-global-esports-market-report-2019-light-version/ (04-07-2019).

13 E-sports enthusiasts: people who watch professional e-sports content more than once a month.

14 World Tourism Organization (2019), *Walking Tourism – Promoting Regional Development,* UNWTO, Madrid, DOI: https://doi.org/10.18111/9789284420346.

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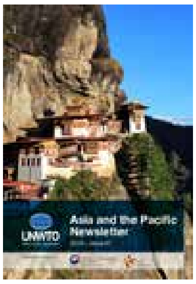
UNWTO publications

Asia Pacific Newsletter, issue 47



The *Asia Pacific Newsletter,* published since 2005, in partnership with Kyunghee University (funded by the Ministry of Culture, Sports and Tourism of Republic of Korea) and the Korea Tourism Organization is released bi-annually and distributed to 68 countries, especially in the Asia and Pacific region. The main purpose of the Newsletter is to introduce current tourism related activities of the UNWTO itself and also of Member States on issues such as national tourism policies, strategies and major tourism events.

Consult this publication at the UNWTO website:
http://asiapacific.unwto.org/newsletter/2019-01-21/unwto-asia-pacific-newsletter-47-issue

UNWTO World Tourism Barometer

The *UNWTO World Tourism Barometer* and accompanying Statistical Annex aim to provide tourism stakeholders with up-to-date statistics and analysis in a timely fashion. The information is updated four times a year and covers short-term tourism trends, including a retrospective and prospective assessment of current tourism performance by the UNWTO Panel of Tourism Experts.

The Statistical Annex is available in English, French, Spanish and Russian.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/loi/wtobarometereng

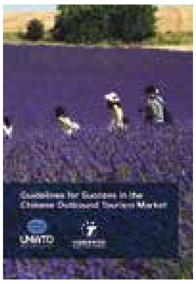
UNWTO Tourism Highlights, 2019 Edition

The booklet presents a concise overview of international tourism in the world based on the results for the year 2017. The booklet includes:

- Key trends in international Tourism in 2018;
- Results by (sub)region and country of destination;
- World's top tourism destinations; and
- Outbound tourism by region and top spenders.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284421152

Guidelines for Success in the Chinese Outbound Tourism Market



The Chinese outbound tourism market is already very strong and has huge potential to grow further still. These guidelines from the China Tourism Academy and UNWTO offer valuable insights into the factors motivating Chinese tourists to travel. It also presents a valuable toolkit to guide destination managers and decision makers on the best way to tap into this lucrative and productive market.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284421138

UNWTO/WTCF City Tourism Performance Research

The *UNWTO/WTCF City Tourism Performance Research* brings forward an analysis and evaluation of success stories in urban destinations. The results were collected by experts who applied the methodology created for the initiative through the realization of field visits and interviews of local tourism authorities and the main stakeholders. The publication based on case studies from 15 cities, provides in-depth understanding of each individual city and has the objective to enable other cities to learn from the progress they have achieved in order to enhance their performance, competitiveness and sustainability.

Consult this publication at the UNWTO Elibrary:
English version:
www.e-unwto.org/doi/book/10.18111/9789284419616
Chinese version: please send an e-mail to pub@unwto.org

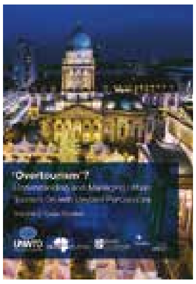
'Overtourism'? – Understanding and Managing Urban Tourism Growth beyond Perceptions

Volume 1: Main report
Volume 2: Case studies

The management of tourism flows in cities to the benefit of visitors and residents alike is a fundamental issue for the tourism sector. It is critical to understand residents' attitude towards tourism to ensure the development of successful sustainable tourism strategies.

This report analyzes the perception of residents towards tourism in eight European cities – Amsterdam, Barcelona, Berlin, Copenhagen, Lisbon, Munich, Salzburg and Tallinn – and proposes 11 strategies and 68 measures to help understand and manage visitor's growth in urban destinations.

The implementation of the policy recommendations proposed in this report can advance inclusive and sustainable urban tourism that can contribute to the New Urban Agenda and the Sustainable Development Goals.



This second volume includes 18 case studies across the Americas, Asia and the Pacific and Europe – Amsterdam, Antwerp, Barcelona, Berlin, Besalú, Cambridge, Dubrovnik, Edinburgh, Ghent, Hangzhou, London, Lucerne, Macao, China, New York, Lisbon, Seoul, Porto, Prague and Venice – on how cities are implementing the following eleven strategies: 1. Promote the dispersal of visitors within the city and beyond; 2. Promote time-based dispersal of visitors; 3. Stimulate new visitor itineraries and attractions; 4. Review and adapt regulation; 5. Enhance visitors' segmentation; 6. Ensure local communities benefit from tourism; 7. Create city experiences that benefit both residents and visitors; 8. Improve city infrastructure and facilities; 9. Communicate with and engage local stakeholders; 10. Communicate with and engage visitors; and 11. Set monitoring and response measures.

Consult these publications at the UNWTO Elibrary:
Volume 1:
www.e-unwto.org/doi/book/10.18111/9789284419999
Volume 2:
www.e-unwto.org/doi/book/10.18111/9789284420629

New Business Models in the Accommodation Industry – Benchmarking of Rules and Regulations in the Short-term Rental Market

Several factors explain the growth of the so-called "sharing economy" in the tourism sector over recent years, including the 2010 global economic crisis, digitalization and new trends in travellers' behaviour and preferences. This growth has been particularly notable in the accommodation industry. With the emergence of online platforms for short-term rentals, the market has been expanding at an unprecedented rate.

Building upon UNWTO's 2017 publication *New Platform Tourism Services (or the so-called Sharing Economy) – Understand, Rethink and Adapt,* this report provides an analysis and benchmarking of 21 case studies in terms of the rules and regulations applied to the short-term rental market, focusing on three key areas: 1) fair competition; 2) consumer protection; and 3) planning and sustainability.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284421084

Global survey on the perception of residents towards city tourism: impact and measures

This research is a result of a partnership between the World Tourism Organization (UNWTO) and IPSOS. To better manage the issues arising from the growing tourism demand in urban destinations it is essential to understand resident's experiences and perceptions on city tourism. The research aims at understanding the perception of residents towards city tourism, its impacts, as well as the most adequate strategies to manage the growing tourism flows in cities.

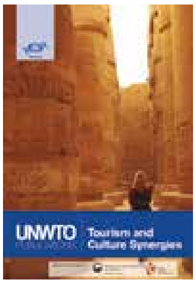
Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284421107

Exploring Health Tourism

The ETC/UNWTO publication on *Exploring Health Tourism* aims to provide a better understanding of the growing segment of wellness and medical tourism. The study introduces the evolution of health-related tourism products and services from all around the world and provides insights into the current situation of the industry, as well as the future potential. It also includes a comprehensive taxonomy that serves as a common reference for tourism destinations operating in this field, as well as a practical toolkit to assist NTOs and DMOs with their planning and management of health-related tourism activities.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284420209

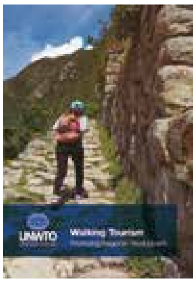
Tourism and Culture Synergies



The UNWTO report on *Tourism and Culture Synergies* highlights the symbiotic relationship between tourism and culture and the interdependency of the two sectors. The report, undertaken through a survey of UNWTO member states and expert opinion, affirms that cultural tourism plays a major role in global tourism today. It also reveals that the sub-sector, in keeping with the changes to tourism as a whole, has been transformed by changing lifestyles, new forms of culture and creativity, and evolution and innovation in technology.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284418978

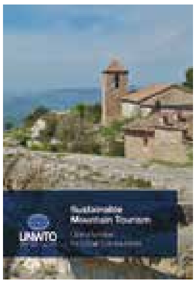
Walking Tourism – Promoting Regional Development



Walking tourism is now one of the most popular ways to experience a destination. It allows tourists to better engage with local people, nature and culture. It also meets the growing demand of travellers of outdoor activities in general, including when they travel. Walking tourism can be developed anywhere as a sustainable tourism offer with a relatively small investment. It can bring about social and economic benefits to residents and communities if properly developed and managed. This report showcases various successful examples of walking tourism and aims to serve as a practical reference for destinations with a focus on the role of walking tourism in regional development.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284420346

Sustainable Mountain Tourism – Opportunities for Local Communities



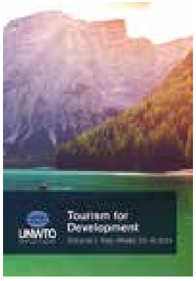
Recognizing the potential of mountain tourism for driving the socioeconomic growth and development of local communities, this publication presents a summary of the information generated at UNWTO's mountain tourism events (i.e. World Congress on Snow and Mountain and Euro-Asian Mountain Tourism Conference), including a systematic definition of mountain tourism.

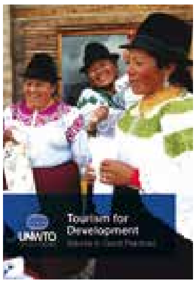
In addition, it gives an overview of the development of mountain tourism in different parts of the world over time, and the recent structural changes affecting this segment as a result of new market patterns.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284420261

Tourism for Development

Volume I: Key Areas for Action
Volume II: Good Practices

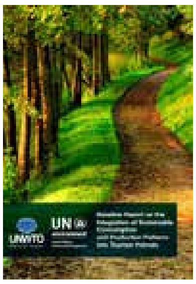




How can tourism effectively contribute to the 2030 Agenda for Sustainable Development? This flagship report addresses the changes needed in policies, business practices and consumer behaviour. Showcased along 23 case studies from around the world, this two-volume report examines the role of tourism in each of the five pillars of the International Year of Sustainable Tourism for Development, 2017: 1. Sustainable economic growth; 2. Social inclusiveness, employment and poverty reduction; 3. Resource efficiency, environmental protection and climate change; 4. Cultural values, diversity and heritage; and 5. Mutual understanding, peace and security.

Consult these publications at the UNWTO Elibrary:
Volume 1:
www.e-unwto.org/doi/book/10.18111/9789284419722
Volume 2:
www.e-unwto.org/doi/book/10.18111/9789284419746

Baseline Report on the Integration of Sustainable Consumption and Production Patterns into Tourism Policies



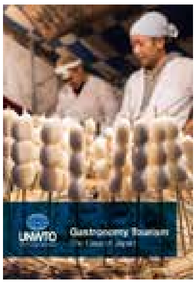
UNWTO expects international tourist arrivals to reach 1.8 billion by 2030, if not before. A sector regularly outgrowing the world economy or international trade, the tourism sector is already facing the challenge of decoupling its growth from the use of natural resources. Advancing sustainable consumption and production (SCP) patterns is therefore essential if the sector is to contribute effectively to sustainable development.

UNWTO and UN Environment embarked on this research project with the objective to gain insights on the much needed integration of SCP into tourism policies. Based on 101 tourism policies from around the world, this is the first global assessment of SCP policy instruments in national tourism. This report also contributes to visualizing the progress achieved towards the implementation of SDG Target 12.b., which calls for "the development and implementation of tools to monitor sustainable development impacts of tourism".

By recommending five strategic approaches to face this challenge, the report ultimately aims to inspire stakeholders and encourage them to advance SDG implementation through sustainable tourism.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284420605

Gastronomy Tourism – The Case of Japan



The report on *Gastronomy Tourism – The Case of Japan,* prepared with the support of the Japan Travel and Tourism Association (JTTA) and Gurunavi, looks at the awareness of gastronomy tourism as a concept in Japan. Based on a survey with the main players in the country, results show that while gastronomy tourism is little-known, activities around this sector exist across the nation.

The report features 18 different case studies of gastronomy tourism activities in Japan, ranging from local Sake breweries to hotel trains. These examples show how gastronomy tourism has been turned into a development tool, inclusion and regional integration in Japan.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284420919

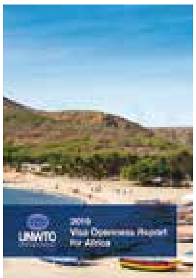
Guidelines for the Development of Gastronomy Tourism

The *Guidelines for the Development of Gastronomy Tourism* have been developed by UNWTO and the Basque Culinary Center (BCC), a UNWTO affiliate member, as part of its long-term collaboration.

The guidelines aim to serve as a practical toolkit to support the development of gastronomy tourism in destinations by providing recommendations on key aspects such as planning and management by national tourism administrations (NTAs), national tourism organizations (NTOs) and destination management organizations (DMOs).

Consult this publication at the UNWTO Elibrary:
English version:
www.e-unwto.org/doi/book/10.18111/9789284420957
Spanish version:
www.e-unwto.org/doi/book/10.18111/9789284420995

2019 Visa Openness Report for Africa



UNWTO surveys visa policies around the world since 2008. The Visa Openness Reports, produced by UNWTO, focus on the entry requirements for tourism purposes.

The *2019 Visa Openness Report for Africa* prepared by UNWTO continues the analysis of visa policies and progress made in visa facilitation over the past ten years, supporting destinations with evidence-based policy making and helping prioritize activities within their facilitation policies. Besides presenting the global perspective, the following report gives specific insights into the temporal changes, as well as current context in regard to visa policies implemented by African countries and their impact on temporary visitors. In addition, the impacts of visa policies implemented by countries of other regions on the citizens of African countries are being presented.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284421039

UNWTO Guidelines for Institutional Strengthening of Destination Management Organizations (DMOs) – Preparing DMOs for new challenges

Many factors account for the increased focus on effective destination management, all of them urging destination management organizations (DMOs) to face and adapt to new challenges. From traditional marketing and promotion boards the trend is for these entities to increasingly enlarge their scope to become all embracing DMOs, aiming to enhance the competitiveness and sustainability of destinations within a harmonious relationship between the residents and visitors.

These guidelines aim to stress the relevance of having a leading organizational entity at destination level and setting a sound framework of criteria and indicators for DMOs, based on the UNWTO.QUEST Certification; overall, to provide a set of recommendations for DMOs to improve their planning, managing and institutional governance.

Consult this publication at the UNWTO Elibrary:
www.e-unwto.org/doi/book/10.18111/9789284420841

List of figures and tables

List of figures

List of tables

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The *UNWTO/GTERC Asia Tourism Trends – 2019 Edition,* the sixth annual report in the series, highlights in its first chapter the rapidly growing tourism sector in Asia and the Pacific. The 2nd chapter examines the potential of the Chinese outbound tourism market, the world's largest in both numbers and expenditure, to South America, with particular emphasis on Argentina and Brazil. The third chapter focusses on Health Tourism in Asia. Encompassing both wellness and medical tourism, Asian destinations have long been pioneers in embracing this sector. The final chapter is related to Sports Tourism in Asia, ranging from mega events to the rise of e-sports, as well as marathons, walking tourism and cycle tourism. The chapter shows how all of these can drive community development and therefore help meet several key Sustainable Development Goals.

The **World Tourism Organization (UNWTO),** a United Nations specialized agency, is the leading international organization with the decisive and central role in promoting the development of responsible, sustainable and universally accessible tourism. It serves as a global forum for tourism policy issues and a practical source of tourism know-how. Its membership includes 158 countries, 6 territories, 2 permanent observers and over 500 Affiliate Members.

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