



Thursday March 14, 2-3 PM CET

# The Future of Chinese Tourism in Europe

SHANGHAI  
Jungle

A free webinar by Shanghai Jungle

# Today's Agenda

WEBINAR STRUCTURE — MAREK, SHANGHAI JUNGLE

---

WHY WE DO THIS WEBINAR — ALEXANDER, SHANGHAI JUNGLE

---

NAVIGATING CHANGES IN CHINESE TOURISM TO EUROPE — ALAIN CHEN, CTRIP EUROPE

---

AUSTRIAN PERSPECTIVES ON CHINESE TOURISM TO EUROPE — EMANUEL LEHNER, AUSTRIAN TOURISM PROMOTION AGENCY

---

UNDERSTANDING CURRENT TRENDS IN CHINESE TOURISTS' BEHAVIOR — XIU XIAOLING, KAYTRIP NORDIC

---

Q&A



# Your Host

## **Marek Matura**

- Managing Partner at Shanghai Jungle
- Head of China
- 10 years in China

# Webinar Structure

- Each guest speaker will have 10-15 minutes for their presentation
- The host will choose questions to answer at the end of the webinar
- Polls will be conducted during the event
- This webinar is being recorded



## Co-Host

### **Alexander Schultz**

- Partner at Shanghai Jungle
- Head of Europe
- 10 years in China



# Guest Speaker

## **Alain Chen**

- General Manager at Ctrip Europe (Tickets and tours)

# Trip.com Group™

An international OTA leader that provides one-stop solutions for travelers globally

March 2024

© Trip.com. All rights reserved.

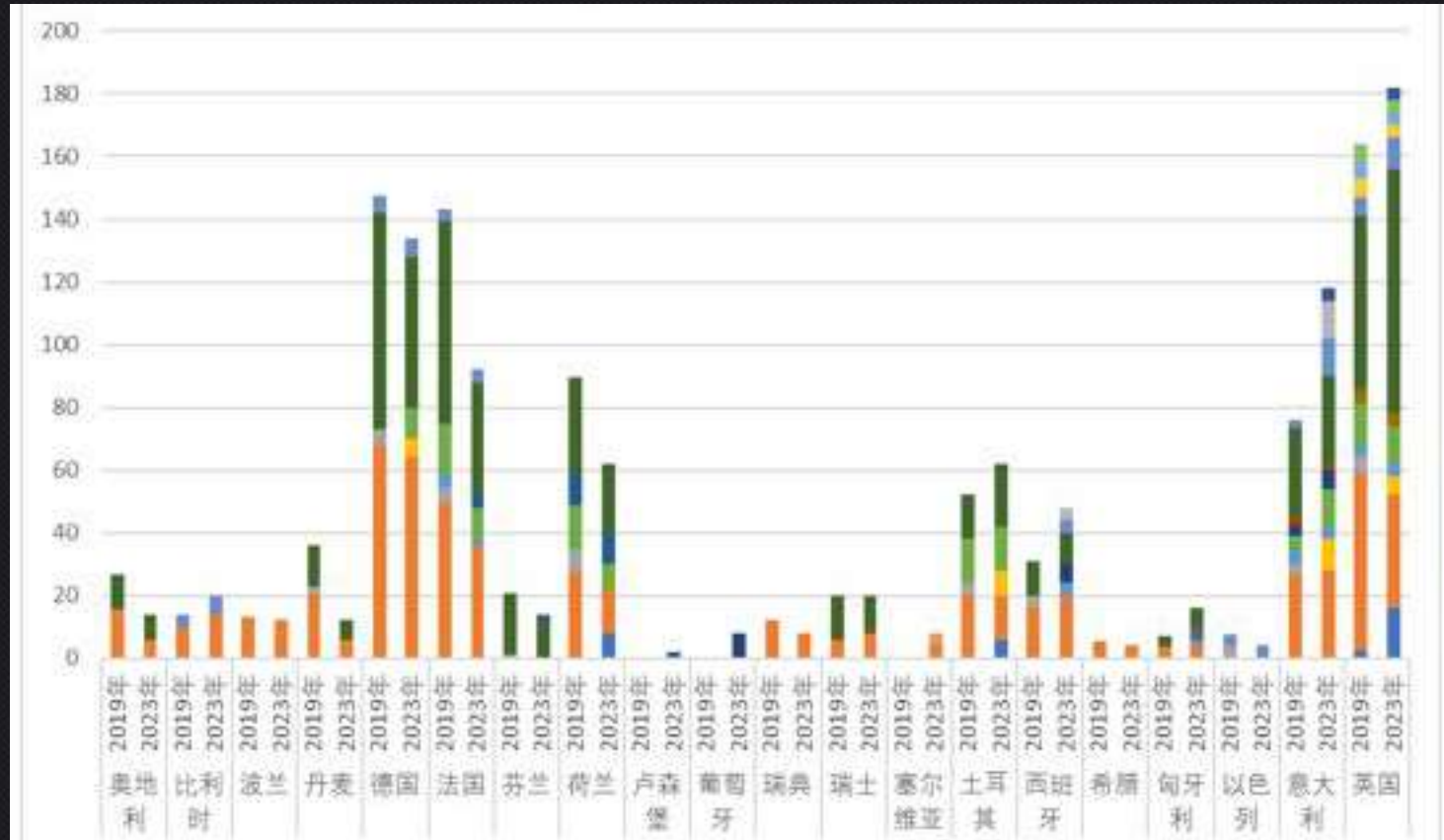
# Meeting Agenda

1. **China Outbound Market Outlook**
2. **Trip.com Group User Profile**
3. **About Trip.com Group**



# Flight Recovery from China to European countries in 2023

(Comparison of weekly flight volumes in December 2023 and average weekly flight volumes in 2019)

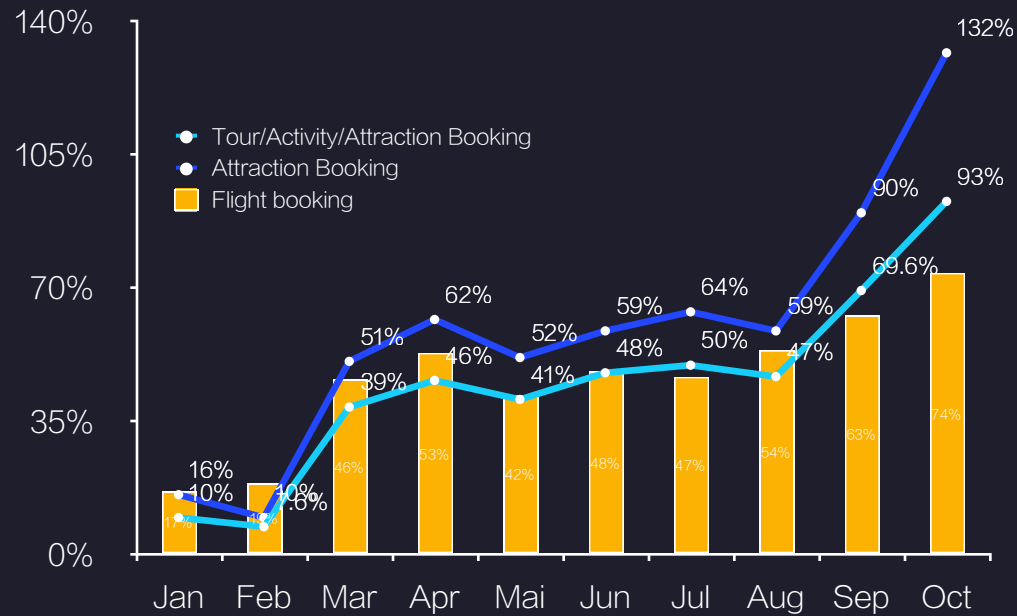


Austria Poland Germany Finland Lux Sweden Serbia Spain Hungary England  
 Belgium Denmark France Holland Portugal Switzerland and Turkey Greece Italy

# Duration for visa application

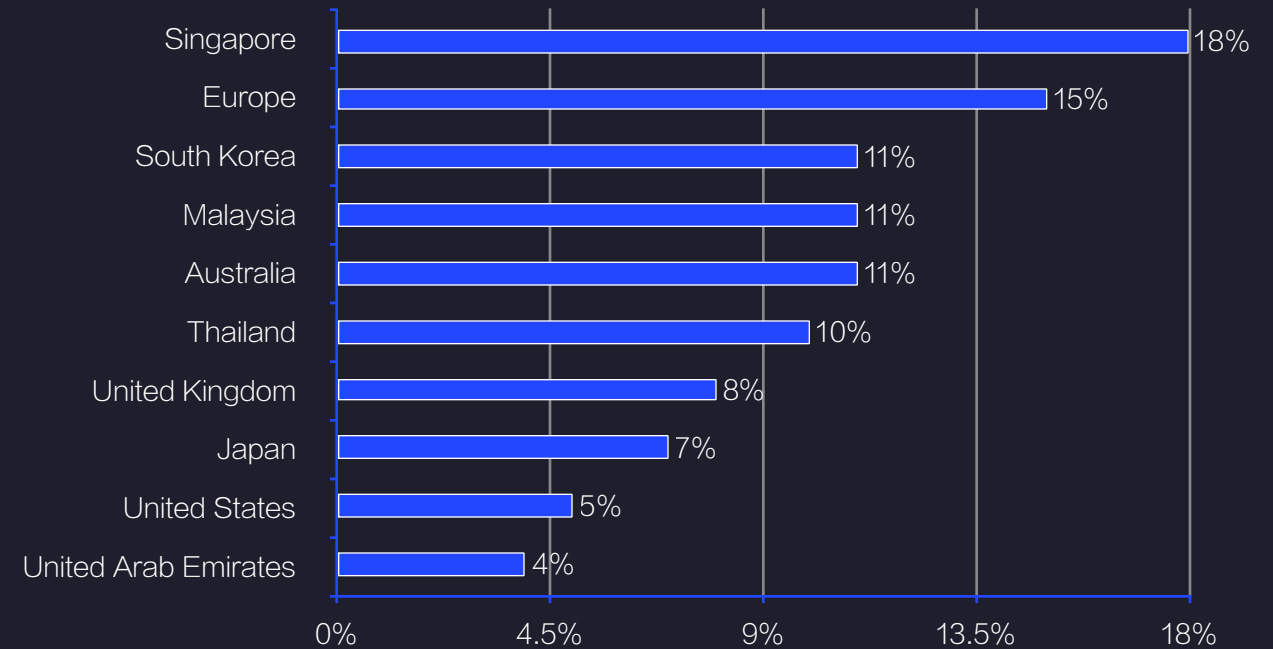
<b>Country</b>	<b>Jul-Sep 2023</b>	<b>Oct-Dec 2023</b>	<b>shorten by (days)</b>
US	94	65	29
Germany	73	54	19
Italy	74	56	18
France	63	49	14
GB	29	25	4

Sales recovery rate 2023 Vs 2019  
China Outbound market to Europe



- 2023: Production surged, peaking in October after a steady rise since March.
- TNT bookings showed consistent growth throughout.
- Attraction Bookings saw an exceptional 132% recovery rate in October

Where Chinese travelers are headed next



Source: CNBC TRAVEL published on NOV 20 2023

On 13 November 2023, the European Council adopted new rules allowing people who plan to travel to the Schengen area to apply online for a visa.

Approx. 55%  
travel bookings  
are by **females**





Over 65% travel  
bookings are by  
millennials



$\geq 65\%$

Below 35



$\leq 35\%$

Above 35

"Millennials, born in the 1980s and 1990s, comprise almost 80% of the online travel demographic in China."

With average of €1,046 per person per trip in Europe compared to €712 of American

Keys factors Influencing China Millennials' Travel Choices"

Experience/Convenience/Assurance

Rank	City	Number of Chinese Tourists in 2019
1	Paris	2.2 million
2	London	1.7 million
3	Rome	1.5 million
4	Barcelona	1.4 million
5	Berlin	1.2 million
6	Amsterdam	886,000
7	Madrid	877,000
8	Milan	783,000
9	Vienna	728,000
10	Munich	711,000

Seek unique culture experiences:  
Storytelling can be crucial

Prefer have a sense of exclusivity  
Offer personalized experience or giveaway

Experiencing local customs and traditions  
Opportunities to engage with local people and taste local food

Willing to spending but also emphasize value-for-money  
Offer special deals and bundled packages

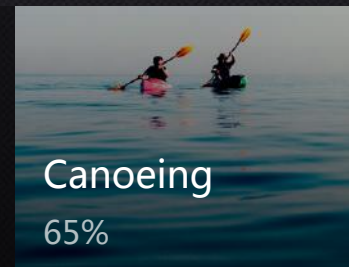
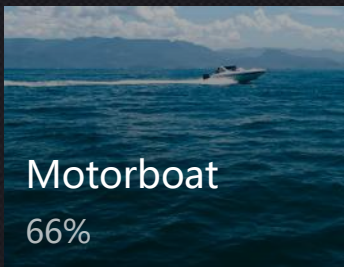
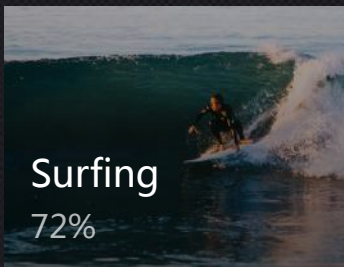
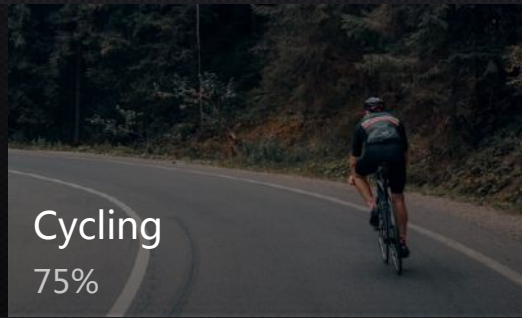
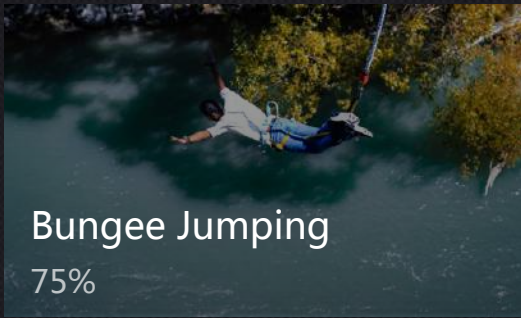
Enjoy sharing on social media  
Create shareable content

They are Tech-savvy:  
Focus on mobile experience



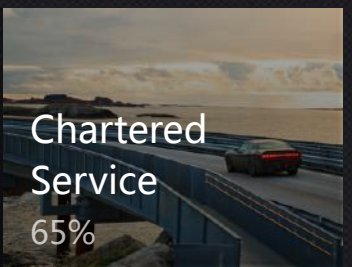
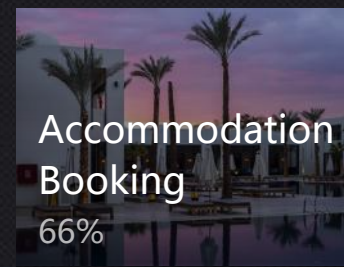
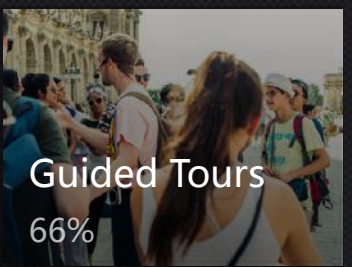
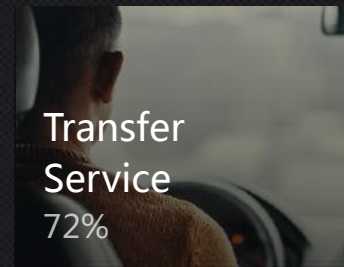
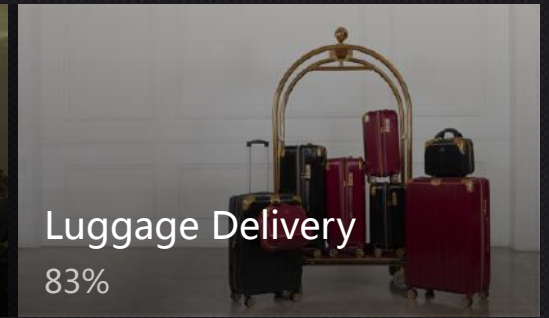
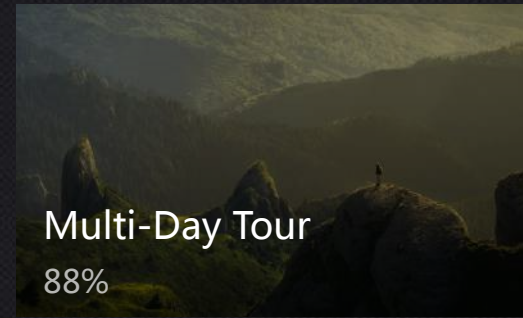
## Adventure

Under 35' s

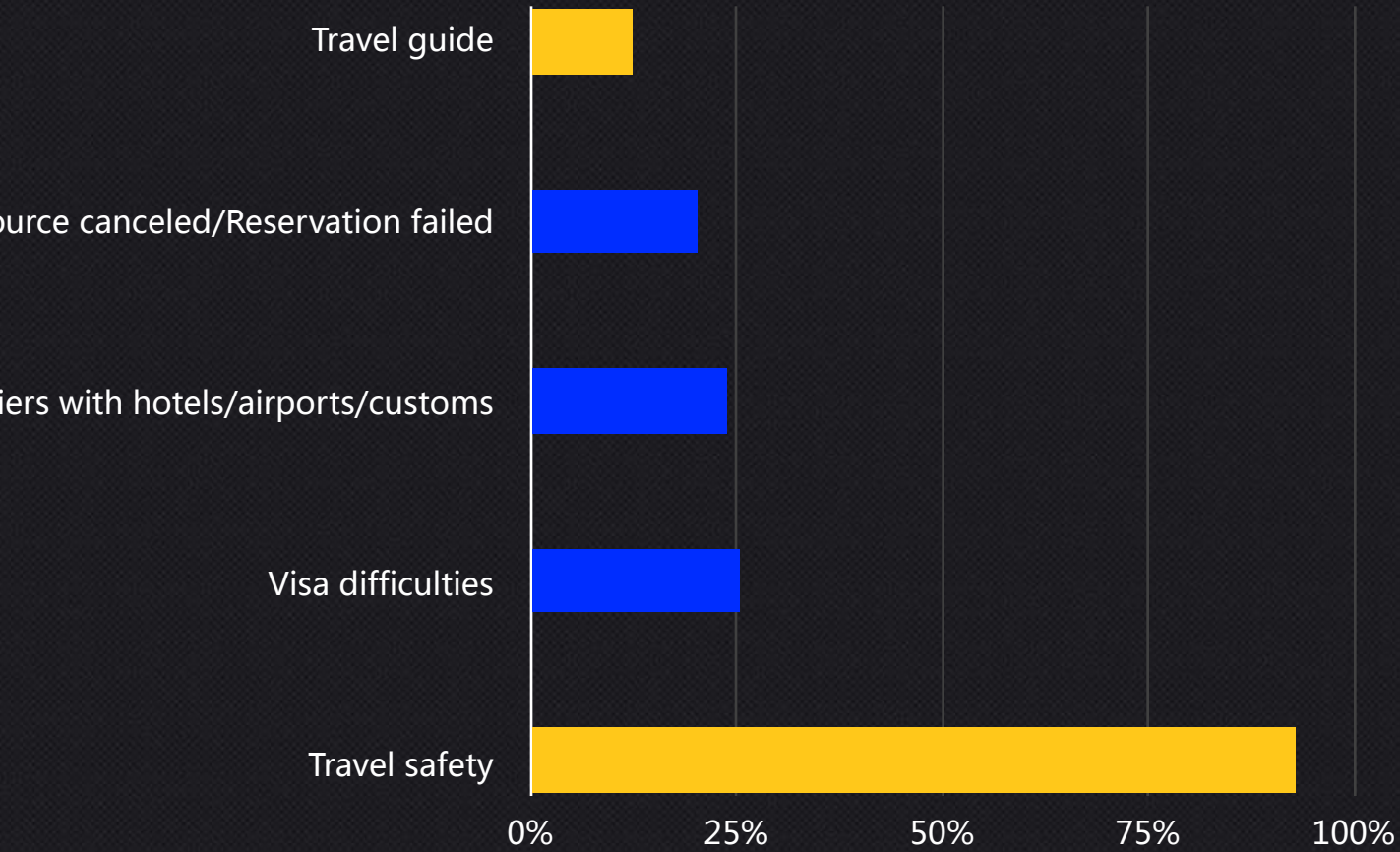


## Convenience

Over 35' s



## User Survey



01

93%

Travel safety

02

25.5%

Language barrier

03

10%

Travel guidelines

04

10%

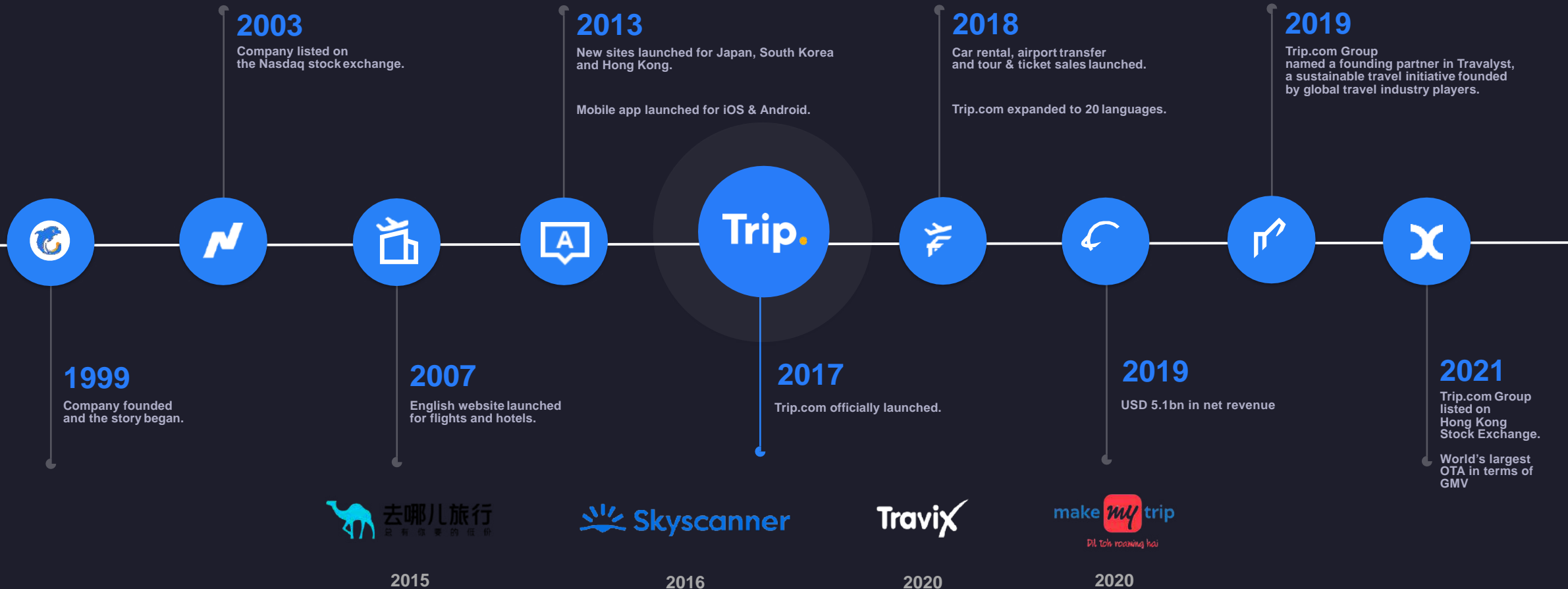
Cancellations



**Trip.com Group™**  
**Tours & Tickets.**

**Trip.com Group**

Trip.com Group (NASDAQ: TCOM, HKEX: 9961)  
 Leading the global travel service industry with sustainable, fast-paced growth



Over 10M

Ctrip APP DAU

3 Billions

Accumulated download

400 million

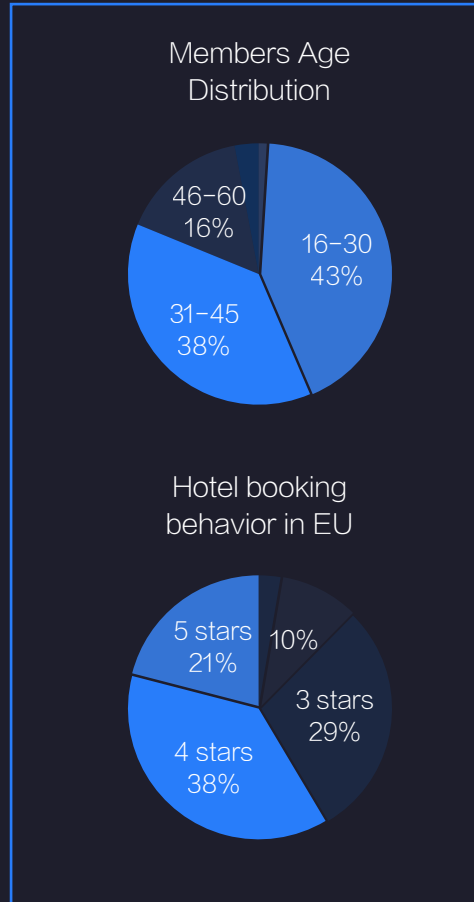
Members around the world



Flight

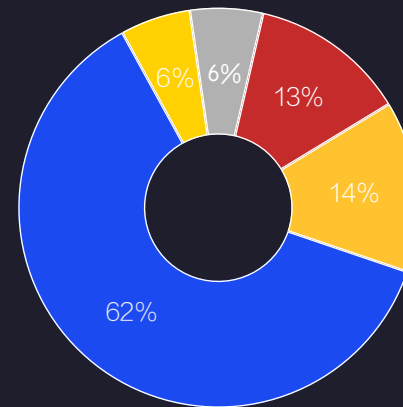
booking

No.1 in industry



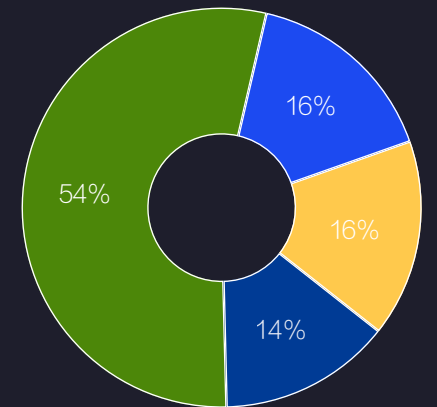
Young & High-spending

China OTA Market (2019) in GMV



- eLong
- Ctrip
- Others
- Fliggy
- Meituan

Global OTAs (2019) in GMV



- Ctrip
- Expedia
- Booking
- Others

Source: iResearch, Analysys China Internet Watch (CIW), China National Tourism Administration (CNTA) and company information  
 Note: 1Market share includes Ctrip and Qunar

Our Mission

# Creating the best travel experience



All-in-one Platform



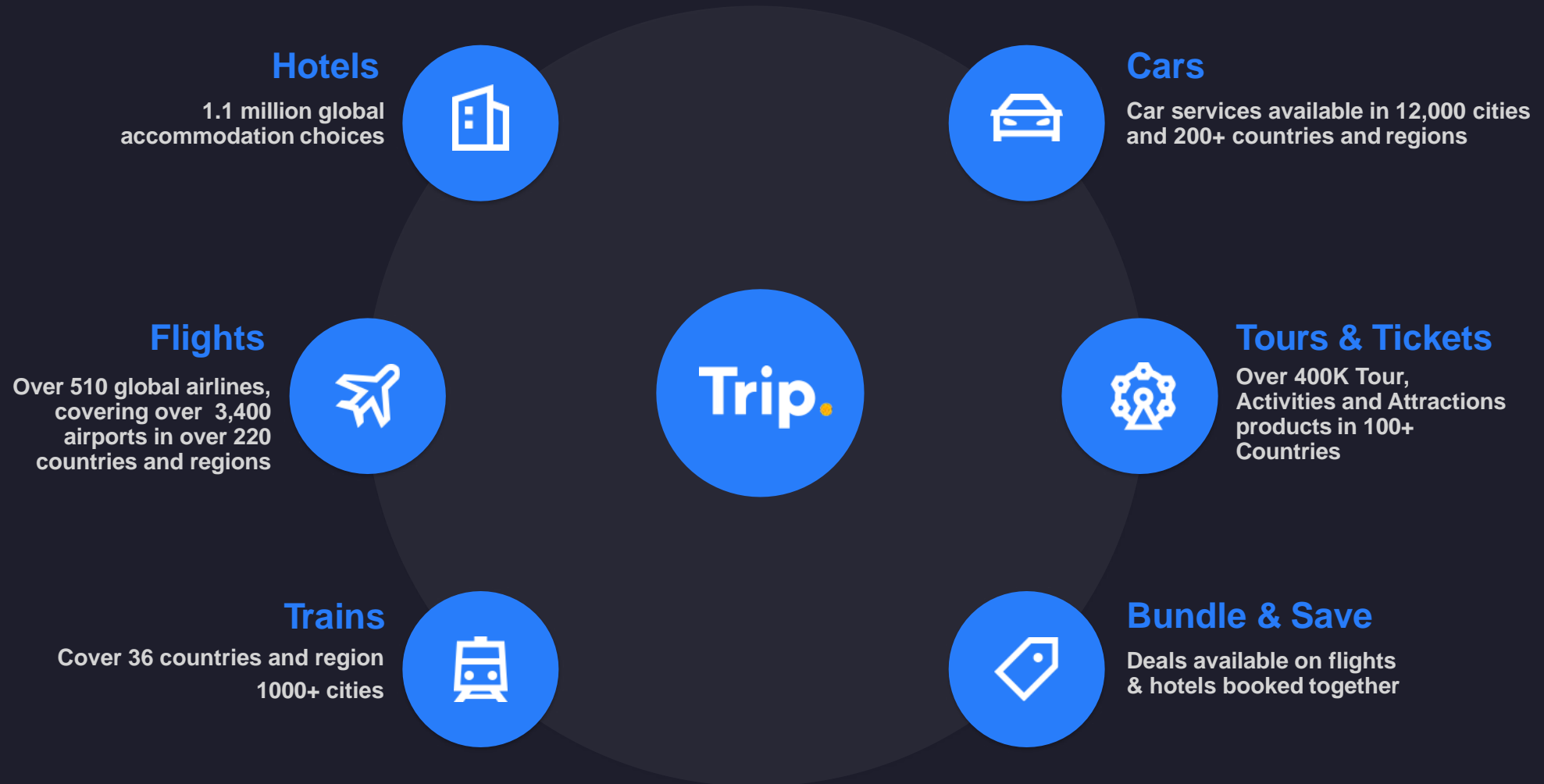
Mobile Experience



Customer Support

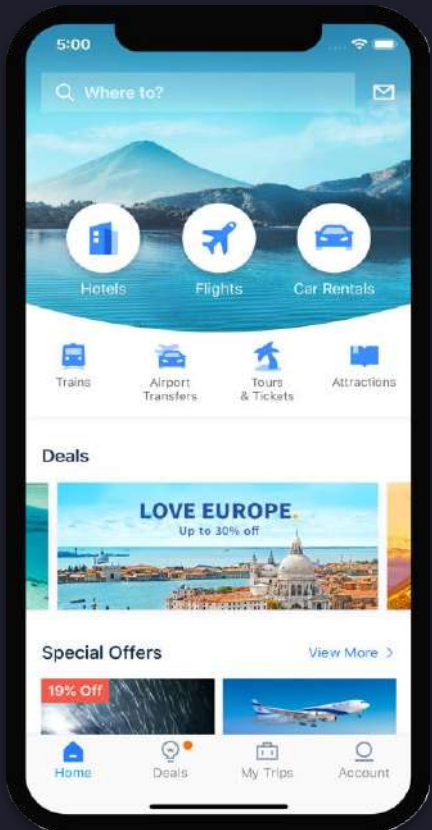
An international OTA leader that provides one-stop solutions for travelers globally

# All-in-one travel platform meets wide range of traveler needs



# Industry-leading mobile experience

Trip.com



Trip.



Ctrip.



4.7/5



153,554 reviews

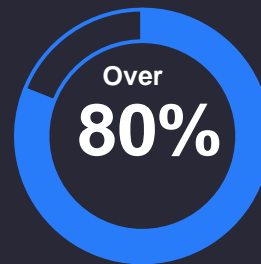


4.7/5

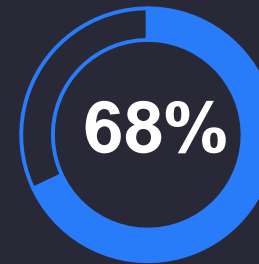


46,430 reviews

Mobile Users



Mobile Bookings



User-friendly experience leads to high engagement.

On average, each visitor engages with **20+** pages on our app.

\*Average visit depth

Dedicated to providing best-in-class service for all our users



24/7

### Customer support

Always available to provide helpful support in English, Cantonese, Japanese and Korean.

24

### Language spoken

English 日本語 Русский Deutsch မြန်မာစာ 韓 國 語  
Français Italiano Español 廣東話 Nederlands  
Türkçe Polski Ελληνικά Português Bahasa  
Indonesia Tiếng Việt 中文 阿拉伯語

15

### Currency

AUD - CAD - CNY - EUR - GBP - HKD - USD - JPY  
- WON - MYR - NZD - PHP - SGD - INR

# Trip.com Group Tours & Tickets.



## Attractions Tickets

- Landmark
- Theme Park
- Arts & Museum
- Ski & Lift
- Exhibition
- Onsen
- Cruise



## Sports & Shows

- Sports Event
- Concert
- Festival
- Musical
- Live Show
- Nightlife



## Tours

- Day Tour
- Multi-day Tour
- City Walk
- Bike Tour



## Experiences

- Cuisine
- SPA & Beauty
- Helicopter
- Climbing
- Skydiving
- Diving
- Kayaking
- Surfing
- Aquatics Class



## WiFi & SIMs

- WiFi
- SIM card
- eSIM card



## Travel Services

- Transportation
- HOHO Bus
- Train Pass
- City Pass
- Arrival Service
- Souvenir

785-311



## Travel Photography

- Photoshoot





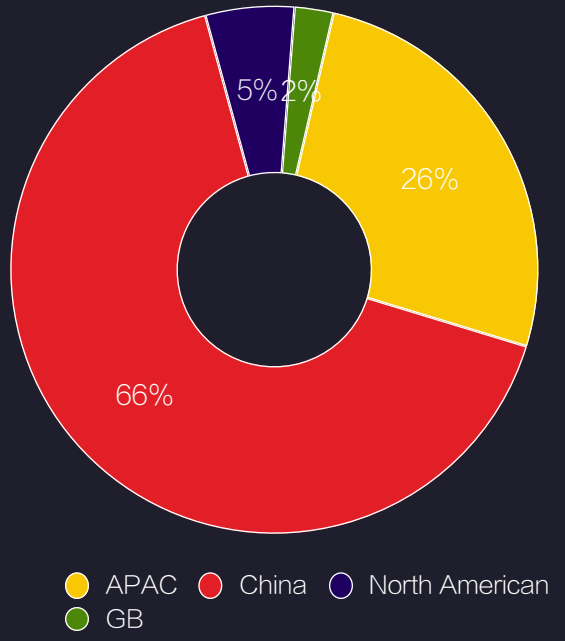
Why  
choose  
Trip.com  
Group?

# Trip.com Group™ Tours & Tickets.

- Access to global high-spending and long-haul travelers (P.10-12)
- Leverage our content-oriented and performance driven marketing approach (P.13-16)
- Access reports, visitor insights and demographics and benefit from our 24/7 customer service(P.7)
- Dependable B2B solution and support for Our Valued Partners (P.17)
- Tap into Trip.com Global ecosystem and partners network (P.18)

# Drive global long-haul travelers to partner venues in Europe

Europe Region Source Market 2023 Q3



China remains our leading source market for Europe, with rapid growth in other regions, including 266% in APAC, 645% in GB, and 175% in the US.



- Mainland China
- South Korea
- Hong Kong
- Singapore
- Thailand
- Vietnam
- Malaysia
- Indonesia
- Japan
- United States
- United Kingdom
- France
- Germany
- Spain
- Ireland
- Netherlands
- Belgium
- Switzerland
- Denmark
- Israel
- Saudi Arabia
- Portugal
- Brazil
- Mexico
- Philippines
- Finland
- Italy
- Austria
- Sweden
- Greece
- United Arab Emirates

# Awareness generating channels

# Our Marketing Approach (Case study)

# On target Channel to drive sales



Brand campaign



Homepage banner/feed



Travel KOL/UGC and 3 party channel

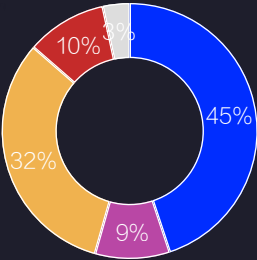


Precision APP Push

POI Page Activation



Internal traffic source distribution Ctip



37% of Sales driven by incremental exposure



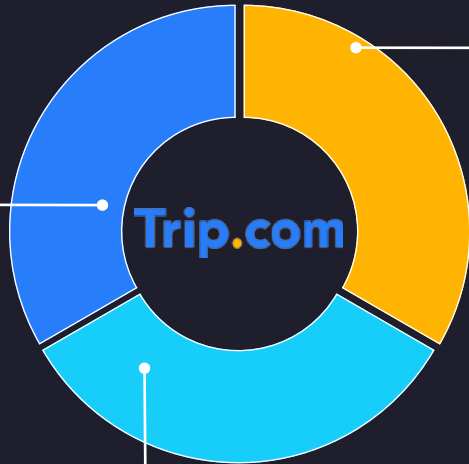
Search bar Optima

### 3 Connectivity solution for our partners

#### Direct API

Connect with our API, backed by our consistent and robust technical support.

<https://ttdstp.ctrip.com/apiplatform/api.do>



#### Connectivity partners

Trip.com has established integrations with over 20 global ticket booking systems, and this number continues to expand.

#### Trip.com B2b portal

Just 4 simple steps to join and manage your inventory and bookings in our b2b platform with reliable support.

<https://www.trip.com/m/vbooking/home>



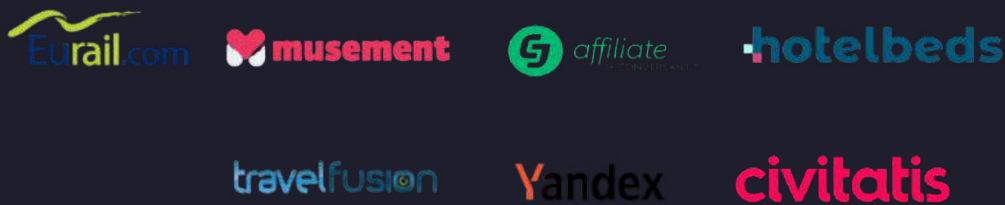
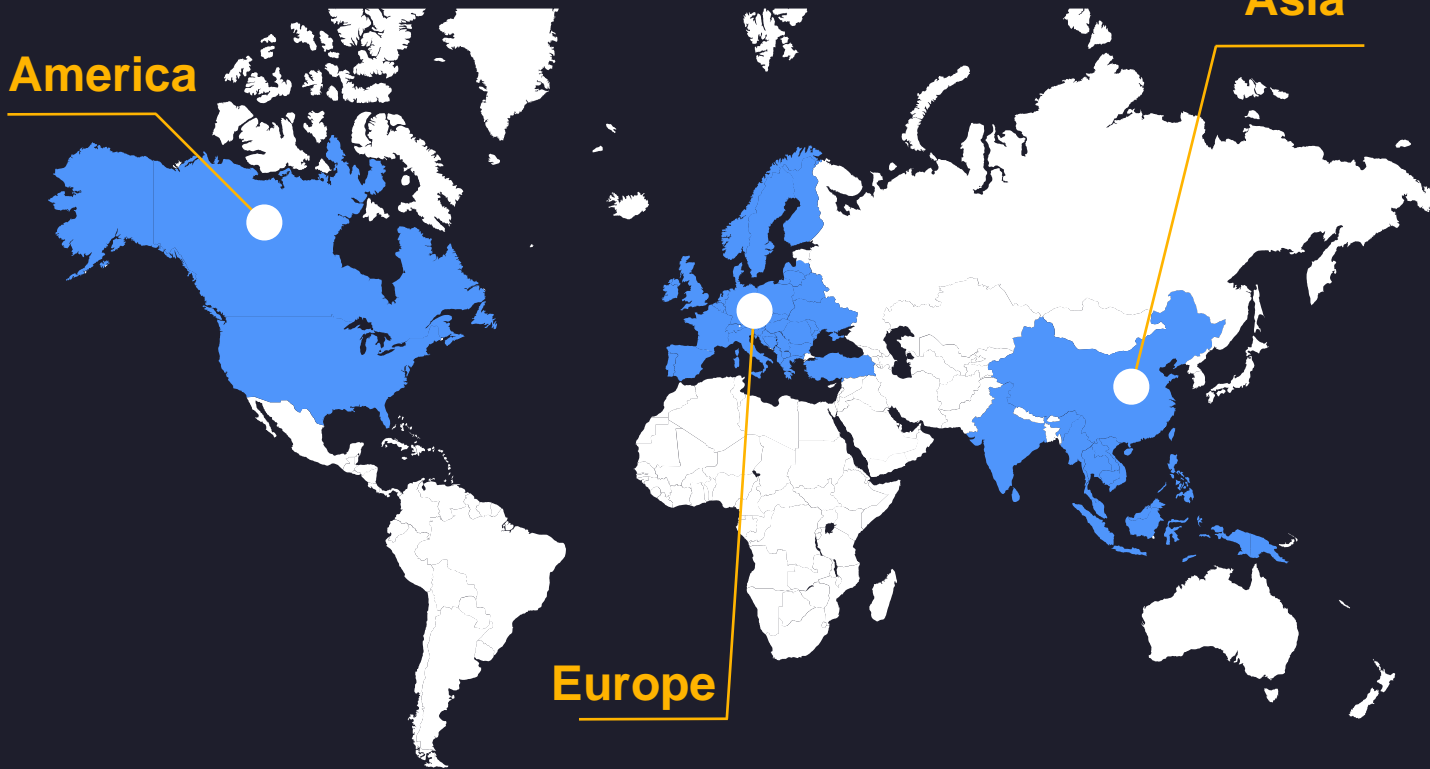
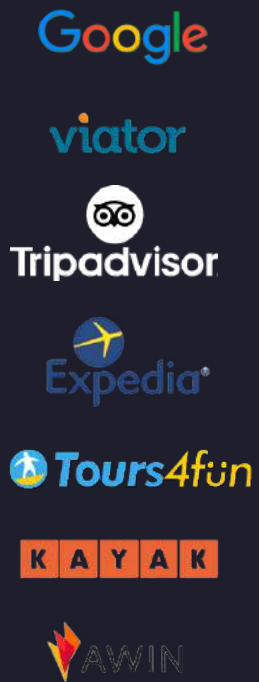
Q1 2024



# Trip.com Group Ecosystem

Partnership over 200 countries and regions

Cover comprehensive Industries over 2000+ channels





# Guest Speaker

## **Emanuel Lehner**

- Head of Markets Asia-Pacific at National Austrian Tourism Promotion Agency

# Chinese tourism to Austria

## March 20th, 2024



## Situation 2019 and 2023

---

### Tourism in Austria 2019/2023




2019:

46 mio. arrivals  
153 mio. overnights

2023:

45 mio. arrivals  
151 mio. overnights

### Tourism from China to Austria 2019



1 mio. Chinese arrivals  
1,5 mio. Chinese overnights

Length of stay: 1,5 overnights

Share of the 4\*-/5\*: 57%

Direct flight connections:

appr. 25

### Tourism from China to Austria 2023



186.000 Chinese arrivals  
352.000 Chinese overnights

Length of stay: 1,9 overnights

Share of the 4\*-/5\*: 52%

Direct flight connections:

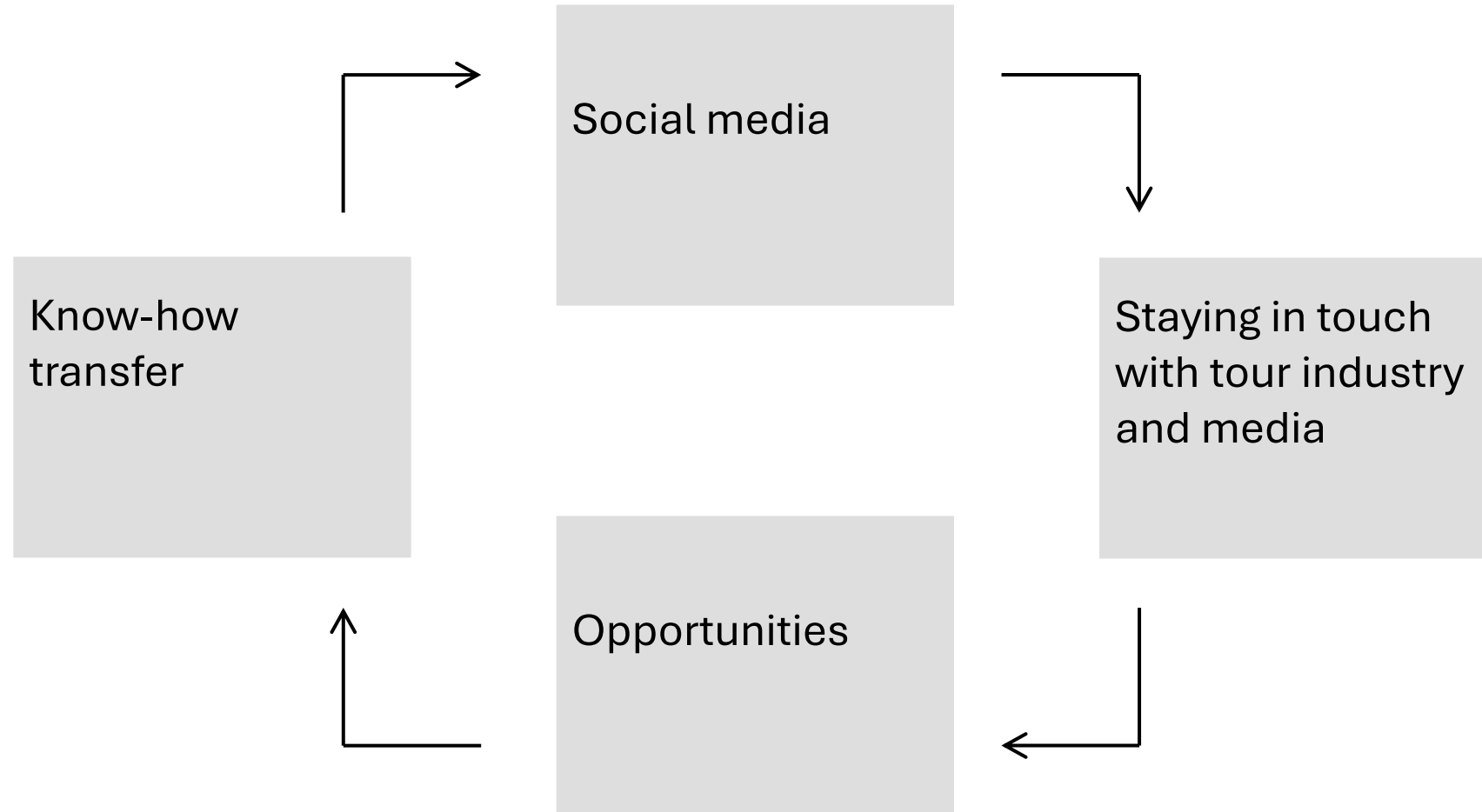
appr. 12

Remark: numbers are again  
increasing month by month.  
E.g. Dec 2023 “only“ 55%  
behind.



## Our focus in China since Covid started

---



## Sustainability

- Sustainability has been a part of the Austrian mindset and culture for a long time
- Austria is currently ranked 3rd in the World Sustainability Ranking
- Austrian tourism product has always been linked very closely to sustainability
- But explicit communication has started only recently
- Stronger focus on sustainable products in the future





# Guest Speaker

**Xiu Xiaoling**

- General Manager at Kaytrip Nordic

# Thanks!

We'd love to hear your  
feedback.

[marek@shanghaijungle.com](mailto:marek@shanghaijungle.com)

SHANGHAI  
Jungle

[shanghaijungle.com](http://shanghaijungle.com)