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# Post-pandemic prospects of Chinese tourism in Italy

Future trends and how to cater to the new needs  
of Chinese tourists

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*To my family,  
who has always encouraged me  
to give my best.*



# 前言

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本论文旨在探讨意大利与中国之间的旅游政策和协议的现状，并预测 COVID-19 疫情后意大利酒店业吸引中国游客的未来趋势和机遇。旅游业历来对意大利的国内生产总值产生重大影响，尽管自疫情以来逐渐复苏，但仍未达到疫情前的水平。由于入境旅游对意大利经济至关重要，因此本研究旨在回答两个问题：中国游客回归意大利会带来什么可能性？意大利酒店业如何更好地为中国游客提供服务？本研究将考察关键要素，例如市场营销、酒店服务、数字推广以及中国游客对意大利的态度和行为等。同时，本研究还将考虑旅游者和旅行服务提供商在该市场面临的挑战和机遇，为希望进入这个重要市场的企业和组织提供有价值的洞察。

近年来，意大利已成为中国游客出境旅游的热门目的地，特别是在米兰、罗马、佛罗伦萨和威尼斯等热门旅游城市。这可能并不令人意外，因为中国游客通常被刻画成“大众旅游者”，以组团形式旅行，有着严格的行程安排，只在主要景点短暂停留拍照，缺乏灵活性。然而，随着中国出境旅游市场的不断发展和成熟，这种刻板印象已经越来越少见。如今，越来越多的中国游客开始独立旅行，并有着新的和不断发展的需求，其中许多需求是由 COVID-19 疫情塑造的。因此，目的地管理者、酒店业和旅游业中的其他参与者需要适应这些变化，并创建量身定制的旅游产品以吸引这个重要的游客群体。

本论文共分为四个章节，每个章节建立在前一个章节的基础上，以全面了解意大利旅游业中中国游客的现状和未来增长潜力为目标。第一章聚焦于意大利和中国在旅游业中的关系，探讨了两国之间已建立的各种协议和举措。其中包括“2022 中意文化旅游年”以及“一带一路”倡议及其对旅游业的影响。此外，还讨论了中国游客在意大利的旅游历史，包括影响旅游业增长的因素，如意大利在 2004 年获得的“ADS”（旅游目的地国家认证）地位。本章提供了关于两国旅游业关系的概述，为后续章节的实践应用奠定了基础。

论文的第二章将着重分析 COVID-19 疫情对中国旅游业的影响，以及旅游业如何适应疫情带来的变化。旅游业是受影响最大的行业之一，旅行限制和封锁措施阻止了人们的出境旅行。随着旅游业的逐渐恢复，考虑到如何重建中国游客的旅游信心，吸引他们再次来意大利旅游变得至关重要。随着 2023 年 1 月中国出境旅游限制的解除，预计中国游客将重返国际旅游

市场。然而，中国游客在经历了三年的旅行禁令后，需要时间来适应新的情况。疫情期间出现了一个有趣的现象，即“复仇旅游”，指的是人们在疫情后重新旅行的动力因素。恢复到疫情前的中国出境旅游水平需要一定的时间，特别是在欧洲和意大利。影响旅行的因素包括交通和住宿的高价、获得签证的时间较长，以及当前缺乏航班。

第三章将分析中国旅游在意大利的未来趋势，包括中国游客的特点和动机、市场细分、行为和偏好，以及因疫情而出现的新旅游趋势。此外，本章还将探讨数字平台的重要性，例如在线旅行社（OTA），以与高度数字化的中国市场建立联系，以及其他在线推广策略，例如跨平台广告和直播，作为吸引这些潜在游客的最有效途径。社交媒体营销是中国近年来的重要趋势。社交媒体和数字营销的成功证明其是一种非常有效的营销方式，这主要得益于近年来互联网的快速发展和普及，各种行业都开始使用社交媒体来宣传自己，旅游业也不例外。旅游经营者们通过社交媒体向客户和潜在客户宣传旅游景点，并提供在线预定服务。这种数字营销方式主要吸引年轻游客，他们被称为自助游者，这是一种新型的旅游方式。近年来，自助游者的数量逐渐增加，他们更倾向于通过互联网寻找信息，预定住宿和交通。中国旅游市场网络营销是不可缺少的一部分，但外国旅游经营者和意大利旅游经营者仍面临着挑战，因为中国的社交媒体格局与西方不同，所以意大利旅游业的公司充分了解和利用中国社交媒体和数字工具是至关重要的。

论文的最后一章将探讨意大利为满足中国游客需求所能采取的实际步骤。这包括研究宣传倡议和采取的措施，以使中国游客在意大利感到受欢迎。本章将重温“2022年中意文化旅游年”，分析意大利国家旅游局（ENIT）如何调整其宣传材料以吸引中国观众的兴趣，以及其他国家和地区机构如何紧随其后。本章还将考虑“Welcome Chinese”认证的重要性，该认证将意大利旅游公司视为“友好中文”的认可。为了让中国游客真正感到在意大利受到欢迎，需要更好地了解现代中国旅行者和他们的社交礼仪。了解“面子”概念很重要，因为它描述了中国人如何向他人展示自己以及他们希望被认为是怎样的人。当提供“面对面”的服务和协助时，应牢记这个概念。建议提供豪华和个性化的旅游、景点和活动，这些内容有利于在社交媒体上发布，受到中国游客的欢迎。为了鼓励重复游览，提供清晰的信息、易于使用的旅行资源、真实和认证的导游以及避免过高费用的定价是很重要的。激励措施，如忠诚度计划或针对重复游客的特别优惠也很有用。创造新的和创新的体验可以让目的地变得令人兴奋，并增加重复游览的可能性。数字可访问性非常重要，因为中国游客精通技术，并且严重依赖数

字工具。建议提供在线预订、数字地图、移动支付选项和免费 Wi-Fi，使用 QR 码和中文材料可以帮助克服语言障碍。通过遵守中国社会规范，提供友好和文化敏感的体验，意大利可以树立积极的声誉。最后，本章将总结为公司提供最佳服务于中国游客和重建他们的旅行需求的实际建议。

整个研究考虑了中意两国在旅游政策方面的互动以及未来的发展前景。它还考察了 COVID-19 大流行对旅游业的影响。在处理中国游客时，需要考虑市场营销、服务行业的规范和标准、数字推广和广告等重要因素。此外，该研究还考虑了中国旅行者对意大利作为目的地的态度和行为，并确定了旅游者和旅游服务提供商在这个市场面临的挑战和机遇。通过研究中国游客在意大利的现状，考虑到影响这一市场的关键趋势和驱动因素，本研究将为旅游提供商和旅游公司提供有价值的见解。

我决定开展这项研究的原因是，意大利旅游业有很大的潜力可以迎合中国游客，但是尽管像“2022 中意文化旅游年”这样的重要举措似乎朝着这个目标努力，但在中国游客方面仍存在很多误解。尤其是在疫情之后，这是意大利旅游业经营者开发更适合中国需求的更好旅游产品的机会，并重新赢回一个重要的旅游客源，必须学习如何针对中国游客的市场营销策略，并制定有效的策略。

总之，意大利旅游业将需要适应疫情带来的变化，并提供量身定制的旅游产品，以满足中国游客不断变化的需求。这可能包括更多的数字营销、特别关注酒店服务以及理解中国游客在旅游行程和活动方面的偏好。意大利和中国在旅游领域的合作也可能是吸引更多中国游客的重要因素。最终，意大利旅游业将需要灵活和创新，以抓住中国游客市场提供的机会，确保其在国际上的竞争力。





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# INTRODUCTION

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The aim of this thesis is to provide an overview of the current situation in terms of tourism policies and agreements between Italy and China, to predict the future trends and the new possibilities for the Italian hospitality sector to attract Chinese tourists after the COVID-19 pandemic. The share of the tourism industry has always had a great impact on the Italian GDP, and fortunately, after falling sharply in 2020 due to the pandemic, it is slowly going up again during the current recovery phase. In 2021, travel and tourism generated about 9.1 percent of Italy's GDP, an improvement compared to the 6.1% in 2020, but still below pre-pandemic levels. COVID has disrupted the travel and tourism sector, as governments took stay-at-home measures to contain the health emergency and, starting from March 2020, causing a sharp decline in the spending by international tourists in Italy. Although this scenario has improved, the monthly expenditures of travelers entering the country have not yet reached pre-pandemic levels as of early 2023. Considering this, inbound tourism for Italy and how to stimulate new tourism influxes are of key importance. 2022 was also "Italy-China year of Culture and Tourism", an official initiative of the two countries to boost cooperation and to highlight the similarities that they both share, reinforcing the concept of *guanxi* 关系, the relationship that ties together the two cultures.

To summarize, there are two main questions driving this research. First, what are the possibilities that come from the return of Chinese tourists in Italy? This includes the current state of relationships in terms of tourism policies between China and Italy and the future perspectives for them, taking into consideration the impact of the COVID-19 pandemic. Secondly, how can the Italian hospitality industry better cater for Chinese tourists going forward? Marketing, hospitality practices, digital promotion and advertising are all key elements to examine when dealing with the Chinese market. Other important elements that will be taken into consideration are the attitudes and behaviors of Chinese travelers towards Italy as a destination, and the challenges and opportunities facing both tourists and travel providers in this market. By examining the current state of Chinese tourism in Italy and considering the key trends and drivers that are shaping this industry, this research will provide valuable insights for travel providers, as well as for businesses and organizations that are seeking to tap into this important market.

In recent years, Italy has been one of the top destinations for Chinese tourists travelling overseas, with peaks on the most famous tourist's destinations such as Milan, Rome, Florence, and Venice. Considering the stereotype of the Chinese tourist in Italy, this doesn't exactly sound like news, as it's common to think of a "Organized mass tourist", following Cohen's classification<sup>1</sup> of tourist types. Travelling in groups with organized packaged tours, inflexible itineraries, with short stops at major landmarks to take pictures and not much else. While these kinds of tourists still exist, it's clear that with the evolving of the Chinese Outbound tourist market and its maturing, this truth is becoming more and more uncommon. New Chinese tourists are individual travelers, with new needs and following evolving trends derived also from the COVID-19 pandemic. The various players in the tourism market, destination managers, the hospitality sector, and all the other industries involved, need to understand these changes and adapt to them, creating tourist products that are catered towards the Chinese market to attract this important tourist segment once again.

This thesis is divided in four chapters, developing a path that starting from the overall current picture of Chinese tourism in Italy leads to more practical implications for the Italian tourism industry and the potential avenues for growth in the future.

The first chapter provides some insights on the relationship between Italy and China in terms of tourism, and the various agreements reached during the years, giving a general overview of the most notable official initiatives that define the two countries' collaboration in this sector. Major attention is put on one of the biggest official events promoted by the two governments, "2022 China – Italy year of culture and tourism", which implied extensive effort by all the formal institutions involved. Another important official initiative that is discussed is the Belt and Road Agreement and its implications for tourism, including the symbolic value of it and the benefits of the new Maritime Silk Road. This has been one of the most ambitious projects developed by the PRC in terms of foreign affairs, and it aims to build a network of countries that collaborates with China, in this case also in terms of tourism. The history of Chinese tourism in Italy is another essential topic to discuss when providing the general overview of the relationship between the countries, understanding the development of Chinese Outbound tourism and what affected the tourist influxes towards Italy, the most notable being the "ADS" status (Approved destination status) granted to Italy in 2004.

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<sup>1</sup> LOWRY Laura, *The SAGE International Encyclopedia of Travel and Tourism*, Sage Publications, 2017.

The second chapter will connect with the history of Chinese tourism by considering the most recent event that affected the industry, the COVID-19 pandemic. As it is known, tourism has been the most affected industry, with lockdown and travel bans preventing people from going abroad, and now that it is recovering it's important to note how this market has adapted to the changes derived from it. This includes the travel industry recovery path and its transformations, and the need to rebuild travel sentiment among Chinese tourists to attract them once again to Italy.

The focus is then shifted towards more practical aspects, with the analysis of the future trends of Chinese tourism in Italy. First, breaking down the characteristics of these travelers coming to Italy, examining their motivations, their segmentation and how it affects their behaviors and preferences, and then analyzing the new generation of travelers (GenZ) and the new tourism trends deriving from the pandemic. An important part of this chapter is also dedicated to digital platforms, mainly OTAs (Online travel agencies), an essential tool to utilize when dealing with the highly digitalized Chinese market. Other online promotional strategies are also discussed, such as cross-platform advertising and livestreaming, as the most effective ways to reach these potential travelers.

The final chapter outlines the ways in which Italy can practically cater to Chinese needs. It includes examples of promotional initiatives and what measures can Italy take to make Chinese tourists feel welcome. Going back to the "2022 China – Italy year of culture and tourism" it will be useful to analyze how ENIT (the Italian National Tourism Agency) put effort into understanding and adapting the promotional material to Chinese audiences, and how other national and regional institutions have done the same. The importance of the official certification "Welcome Chinese" will also be considered, as a way for Italian tourism companies to be recognized as "Chinese friendly". Lastly, the chapter will conclude with some practical advice for companies who wish to provide the most suitable service for Chinese tourists and rebuilding demand for them.

# 1 TOURISM AGREEMENTS BETWEEN ITALY AND CHINA

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This chapter examines the current state of relations in terms of tourism between Italy and China, in particular looking at the “2022 Year of culture and tourism”, promoting the bilateral cooperation between the two countries and the events and agreements reached during this year. China and Italy have a long history of a positive diplomatic relationship, which recently saw its crowning with the signing of the Memorandum of Understanding for admitting Italy in the new Belt and Road initiative by China. Unfortunately, the COVID-19 pandemic put these initiatives on hold, and the impact on Chinese outbound tourism has been one of the harshest due to China “zero-case-first” strategy. Nevertheless, China’s interest on tourism recovery is becoming a more and more urgent topic, as evidenced by the speech of President Dai of China Tourism Academy (the data center of China’s Ministry of Culture and Tourism), entitled "China's Inbound and Outbound Tourism Recovery Process Research and Policy Outlook." In his speech, he highlighted the importance that all regions of the world attach to the Chinese market and the expectations for the recovery, revitalization, and sustainable development of the world tourism industry. <sup>2</sup> This is particularly true for Italy and the impact of the tourism industry in the state’s GDP, so it’s important to review how the promotional initiatives and agreements can positively affect the future influxes of tourists from China.

In this analysis, focusing on the tourism sector, it is also important to note that the main objective of both countries is first and foremost maintaining a positive relationship to benefit and strengthen their economic and financial partnership. Considering this aspect, the official initiatives taken into account (the Belt and Road Agreement and the 2022 Year of Culture and Tourism) share an underlying message of celebrating the two countries’ long lasting friendly relationship to incentivize a more close-knit collaboration in the future that will mainly benefit Italy’s needs for investments and China’s need for EU partners. Nonetheless, tourism remains an important part of both economies, especially for Italy, so these grand-scale initiatives are worth noting and analyzing to provide a background for a future perspective of the travel and hospitality industry recovery.

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<sup>2</sup> Speech of President Dai of China’s Tourism Academy at “Tourism Recovery Cooperation Outlook Forum”, 《中国入境旅游复苏的进程研判与政策展望》 "China's Inbound and Outbound Tourism Recovery Process Research and Policy Outlook", 19<sup>th</sup> September 2022.

## 1.1 2022 CHINA – ITALY YEAR OF CULTURE AND TOURISM

Initially planned for 2020, the China – Italy year of culture and tourism was originally intended as an event to commemorate the establishment of the two countries diplomatic relations' 50<sup>th</sup> anniversary. Postponed to 2022 due to the pandemic, it still holds its message of celebrating the long-lasting bilateral collaboration and the wish for a prosperous future. The main focus of this celebratory year, as the name suggests, is the international cooperation in the tourism and culture sectors, and it featured numerous events hosted in the two countries.

"Italy and China are linked together by a common past and are working on the creation of a bright common future. They are both countries with a thousand-years-long history, they were both glorious empires that conquered huge territories, and are characterized by immense and rich cultures. Italy and China have historically enjoyed profound commercial and cultural exchanges, started by religious men and merchants, such as Marco Polo and Matteo Ricci, who travelled along the Silk Road. Recently the two countries are deepening their relations and cooperating in different fields, including trade, tourism, education, and culture."<sup>3</sup> The year of culture and tourism can be seen as a pact between two world powers in this sector, since together Italy and China can boast a total of 113 UNESCO sites, placing them first and second place in the world ranking for countries with most World Heritage sites.<sup>4</sup> This celebration is then a confirmation of the relationship between the two and a driving force for strengthening and expanding the area of cooperation.

On the opening ceremony held in Rome on the 21<sup>st</sup> of January 2020<sup>5</sup>, the importance of the pact between China and Italy was confirmed by the presence of the Ministers of Culture and Tourism of the two countries, Dario Franceschini and Luo Shugang, as a following of a similar ceremony held on January 15<sup>th</sup> 2022 in Beijing, where the Italian Ambassador Luca Ferrari was present. "There is a great attention to Italy on all fields - said Minister Franceschini - there is a desire to do many things together: from music to co-productions, film, exchanges between museums and exhibitions, and

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<sup>3</sup> TRAVERSO Miriam, *The BRI and Italy-China Cultural Relations: An Overview of the "2020 Year of Culture and Tourism"*, The Twelfth International Convention of Asia Scholars (ICAS 12), Volume 1, p.724 – 735, 2022.

<sup>4</sup> As of 2022, Italy is first place with 58 sites and China is second place with 55 sites.

(source: <https://whc.unesco.org/en/list/stat/#s2>)

<sup>5</sup> Official review of the opening and list of speakers on:

[https://www.esteri.it/it/sala\\_stampa/archivionotizie/eventi/2020/01/italia-cina-2020-anno-della-cultura-e-del-turismo/](https://www.esteri.it/it/sala_stampa/archivionotizie/eventi/2020/01/italia-cina-2020-anno-della-cultura-e-del-turismo/)

working together on tourism, which is growing both in Italy and in China. There is a lot of work to be done and many initiatives are going to be held both in Italy and China, we will start this journey together and strengthen the already existing links in all sectors". Minister Shugang then declared: "There already is a "common language" among our countries, rooted in the past: today the Silk Road is reborn and establishes a new and stronger link between Italy and China. There is a more open spirit to deepen our exchanges, towards a closer partnership. I hope for this Year of Culture and Tourism to bring great satisfaction and be capable of encouraging our bilateral relations, and also encouraging partnerships between our citizens"<sup>6</sup>.

During the Beijing opening ceremony, Italian Ambassador Ferrari emphasized how the Italy-China year of Culture and Tourism is not a point of arrival, but the starting point to strengthen the two countries relationships, fundamental to bring to maturity to many initiatives started in the past years and to start on a virtuous path of relationships that over 2-3 years will bring very positive results. In his speech, he also highlighted how the Year of Culture and Tourism Italy-China 2020 not only could bring people closer together but also intensify trade, economic and financial relations between the two countries.

"I can predict an intensification of our relationship; in recent years the Italian government traced a clear path to boost connections with China, but we will need some years to see the results of it. The year of Culture and Tourism is a fundamental step towards these results, that I believe in a couple of years will give us some really positive outcomes. [...] I believe that a better mutual understanding between Italy and China will benefit both of our countries, not only in terms of export but also in terms of investments. Direct investments are especially important for a country like Italy, and this better understanding of China translates to an afflux of more than 3 million tourists every year, so a noticeable contribution to our country GDP. This will also have an impact on exports, since these Chinese tourists who adopt the "Italian lifestyle" will likely reimport our products in their country,

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<sup>6</sup> Speeches of Minister Franceschini and Minister Shugang at "Italy – China Year of Culture and Tourism opening ceremony", "International cooperation in the tourism and cultural sector between Italy and China: new perspectives" forum, 21<sup>st</sup> January 2020.



so I'm quite positive that this celebratory year will not only brings us closer as people, but also boost our economic, commercial, and financial relationships.”<sup>7</sup>

From the scale of this project and the importance of its message the two countries' interest on this event is clear, “the Italy-China Year of Culture and Tourism in 2022 was born from the collaboration between the Chinese Minister of Culture and Tourism, and for Italy, the Ministry of Foreign Affairs and International Cooperation with the Embassy, the Consulates General in China and the Cultural Institutes, the Ministry of Culture and Tourism and ENIT - the National Agency for Tourism.”<sup>8</sup>

### 1.1.1 World heritage sites twinning initiative

As mentioned before, an important part of the Year of Culture and Tourism is to provide a new opportunity for China and Italy for better communication between people and cultures, and it represents a new phase of the friendly relationship between the two countries, united by the primacy of UNESCO sites, thousands of years of history and territories rich in culture and natural wonders. To emphasize the cultural value and the importance of these sites, the twinning initiative was developed. This translates to several “twin towns” and “twin sites”, locations in Italy and in China that, even if thousands of kilometers apart, share similarities and inestimable artistic significance. The choice of the naming, “twinning initiative”, also points out the fact that the protection and enhancement of the tourist and cultural heritage is not a matter of competition, but rather a shared effort towards the preservation of core parts and symbols of national identity for both countries involved.

This concept, however, is not new to the 2022 initiative. The oldest and most notable pairs of twin towns are Milan and Shanghai (established in 1979), Florence and Nanjing (1980), Venice and Suzhou (1980). The pairing of Milan and Shanghai was developed because the two cities can be considered respectively Italy and China's economic and fashion capitals. The pairing of Florence and

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<sup>7</sup> Speech of Italian Ambassador in China Luca Ferrari, source: [https://www.esteri.it/it/sala\\_stampa/archivionotizie/approfondimenti/2020/01/italia-cina-2020-intervista-all-ambasciatore-d-italia-in-cina-luca-ferrari/](https://www.esteri.it/it/sala_stampa/archivionotizie/approfondimenti/2020/01/italia-cina-2020-intervista-all-ambasciatore-d-italia-in-cina-luca-ferrari/)

<sup>8</sup> <https://www.annoitaliacina.it/en/year>

Nanjing comes from the fact that both cities were ancient capitals, and they both can boast an abundance of historically important buildings and sceneries. Finally, the pairing of Venice and Suzhou is the most evident one because of the presence of canals and bridges in the ancient part of Suzhou, giving it the nickname of “The Venice of the East” (dōngfāng de wēinísī 东方的威尼斯). New additions to the twinning initiative are the pairing of the city of Verona with the West Lake cultural landscape of Hangzhou, and the pairing of Villa D’Este and Villa Adriana with the Summer Palace in Beijing.

“The protection of cultural heritage has always been a central theme in the history of cultural cooperation between Italy and China and, in the implementation of the “Convention for the Protection of World Cultural and Natural Heritage” of 1972, the two countries have shown a great and assiduous commitment that has made it possible to achieve important and comparable results.”<sup>9</sup> This initiative holds a great meaning for the two countries, as it demonstrates that the completely different cultures and populations share more similarities than one might think. It embodies the mutual respect and mutual learning between the ancient civilizations of China and Italy. As a shining example of the close exchanges both cultures enjoy, it also exhibits the strong bond which exists between the two peoples. The governments regard for this message is clear, even from looking at the Memorandum of Understanding for the addition of Italy to the New Belt and Road Initiative, one of the points cites the twinning program among Italian and Chinese UNESCO World Heritage Sites.<sup>10</sup> Particular attention is put on the relationship between the sites and sustainability, territory, heritage, research, training, and new technologies.

### 1.1.2 Main events and initiatives for the Year of Culture and Tourism

The Italy-China year of Culture and Tourism featured an extremely varied program of events in the two countries, all aimed to emphasize the link between the cultural and tourism offering with their promotion, with a focus on digital implementation. In 2022, with Covid as part of everyday life and travel between China and Italy still largely impracticable, the program of events for the year of

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<sup>9</sup> <https://www.annoitaliacina.it/en/heritage>

<sup>10</sup> See Chapter 1.2 for a more in-depth analysis of the implications of the Belt and Road MOA.

culture and tourism focused on digital and bilateral exchanges. It began with the exhibition about the origins of the Italian nation "Tota Italia", set up in May 2022 in the stables of the Quirinale which subsequently left for Beijing. China then made available some statues of the famous terracotta army of Xi'An, gathered in the exhibition "Parallel space". To overcome the physical gap, the digital initiatives are key for the success of the events. The digital environment was a key aspect even when the Pandemic wasn't taken into consideration, seeing as the opening event held in January 2020 started with a Forum called "International cooperation in the tourism and cultural sector by Italy and China: a new outlook", aimed at discussing sustainable tourism, and the changing touristic behaviors in the age of Internet. To connect the two countries, the opening concert held in Rome was also streamed live, with performances from famous singers, performers, orchestras and conductors from Italy and China. "The vibrant events of the Italian Year of Culture and Tourism serve as a testament to the importance of mutual respect and learning, which are necessary for establishing a shared future for humanity. Azzolina Maria Rosa, Secretary-General of the Italy-China Association, emphasizes that these values contribute to promoting solidarity, harmonious coexistence, and global peace and stability. Through collaborative efforts in the cultural and artistic realm between Italy and China, new energy is injected into the development of bilateral relations, setting an example for inter-civilizational dialogue and mutual learning."<sup>11</sup>

An additional symbolic connection between the two countries are the Winter Olympics, held in 2022 in Beijing and in 2026 in Milan and Cortina. For the occasion, the Chinese Embassy in Italy in collaboration with the Olympic Committee inaugurated an exhibition about the Winter Olympics, also as part of the Chinese strategy to consolidate their national image for the games (Winter Olympics and establishing of a National Image Strategy, 冬奥与国家形象建设). On January 11, the Exhibition "China-Italy: Olympic and Paralympic Games Beijing 2022" was inaugurated simultaneously in Beijing and Milan, using the "online and offline" format to allow mutual connection and participation. Yan Jianrong, the spokesman of the 2022 Chinese Olympic Committee stated that the aim of the exhibition is to strengthen the development of cultural exchanges and practical cooperation between the two countries. This was also reiterated by President Xi Jinping,

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<sup>11</sup> HAN Shuo 韩硕, XIE Yahong 谢亚宏, KONG Ge 孔歌, 《中国意大利文化和旅游年"交流活动精彩纷呈——促进文明互鉴 增进民心相通》 *Colorful and diverse exchange activities of the "China-Italy Year of Culture and Tourism" - promoting mutual learning and understanding between cultures*, 人民日报, People's Daily, 2022. Available at: <https://www.yidaiyilu.gov.cn/xwzx/gnxw/269532.htm>

who affirmed that the Year of Culture and Tourism is an opportunity to promote winter sports and snow tourism. Li Jinhua, Chinese Ambassador in Italy, shared a positive message for the mutual cooperation of the two countries: "The time of a winter Olympics is relatively limited, but the friendship born through the Winter Games continues. 2022 is the "Year of Culture and Tourism China-Italy" and, thanks to the Games, interpersonal exchanges and concrete cooperation between the two countries will inaugurate a new and greater development"<sup>12</sup>. From his words, it's clear how China is ready to continue to strengthen its communication and cooperation with Italy, to exchange experiences in the management of the Olympic Games while promoting more bilateral exchanges.

Another important event which received significant media coverage and attention from both President Xi and President Mattarella is the aforementioned "Tota Italia" exhibition<sup>13</sup> (in Chinese, 《意大利之源——古罗马文明展》 yìdàlì zhīyuán—gǔluómǎ wénmíng zhǎn). This exhibition was curated by the Italian ministry of culture in collaboration with Chinese authorities, and it displays artifacts from the early stages of Romanization of the Italian peninsula, starting from the 4<sup>th</sup> century BC, until the unification under the Roman Emperor Augustus. This exhibition featured 308 historical pieces from 28 different Italian museums, and since that the COVID outbreak was still going strong at the time of the setup, China and Italy successfully overcame a great number of difficulties with this new method for the setting up of historical artifacts for exhibitions. Through detailed video tutorials made from the Italian organizations, the Chinese counterpart was able to successfully complete the installation, with an innovative attempt at cross-border cooperation for the care of cultural finds. This transnational exhibition of cultural finds can be considered to be a bridge for communication between China and abroad, making it the embodiment of the spirit of 2022 Year of Culture and Tourism.

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<sup>12</sup> Interview with ambassador Li Jinhua, 17<sup>th</sup> September 2021.

[https://www.rainews.it/archivio-rainews/articoli/Cina-e-Italia-restano-partner-strategici-globali-a33b4f65-b26f-4f73-bc92-b87a5b5a818e.html?refresh\\_ce](https://www.rainews.it/archivio-rainews/articoli/Cina-e-Italia-restano-partner-strategici-globali-a33b4f65-b26f-4f73-bc92-b87a5b5a818e.html?refresh_ce)

<sup>13</sup>It is considered the main event of the 2022 China-Italy Year of culture and Tourism, the opening ceremony in China was held in the presence of important public and political figures such as Huang Kunming, Minister of the Propaganda Department of the Central Committee of the Communist Party of China, Hu Heping, the Minister of Culture and Tourism, Wang Chunfa, the Director of the National Museum, and Zhang Hu, Deputy Minister of Culture and General Coordinator of the Italy-China Cultural Forum. As for Italy, the representatives were the Minister of Culture Dario Franceschini and Ambassador Luca Ferrari.

The exhibition virtual tour is available on the "National Museum of China" website at the link:

<https://www.chnmuseum.cn/portals/0/web/vr/2022ydlzy/>

During the opening ceremony in Beijing, both countries' presidents made sure to express their greetings and their thankfulness to the each other, reinforcing the mutual friendly and cooperative relationship between the two. Minister Huang Kunming, as a representative at the Exhibition opening, read out a message from the President of People's Republic of China, Xi Jinping, who stressed that Italy and China are two exceptional representatives of Western and Eastern civilization respectively, while Minister Franceschini read out a passage from the congratulatory letter sent by Italian president Mattarella to Xi Jinping: "Cooperation in the cultural sphere is a central aspect of the friendship between our countries. This is why, at a juncture still marked by the pandemic, the realization of this initiative in Beijing, together with the many Italian cultural proposals throughout China, is a confirmation that bilateral relations rest on solid foundations, converging between two millenary civilizations, united by mediation skills, curiosity and mutual admiration." said President Mattarella. The positive message was also emphasized by Xi Jinping words, who stressed that mutual respect, solidarity, and harmonious coexistence are the right path for the development of human civilization. "China is willing to work with the international community to support the concept of equality, mutual learning, dialogue and inclusion among civilizations, to transcend the barriers between civilizations through exchanges between civilizations, to transcend the conflicts between civilizations through mutual learning between civilizations and to transcend the superiority of civilizations through the coexistence of civilizations, so as to promote the building of a community with a shared future for humanity".<sup>14</sup>

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<sup>14</sup> Passages from President Mattarella letter and Xi Jinping letter, 10th of July 2022, source: <https://news.cctv.com/2022/07/10/ARTIVT0pOOasqMkmAoOY61UQ220710.shtml>, <https://english.cctv.com/2022/07/11/ARTIxHe5cruTFXE4bdc79aGp220711.shtml>

## 1.2 BELT AND ROAD AGREEMENT – IMPLICATIONS FOR TOURISM

During President Xi Jinping's official visit to Rome in March 2019, the Italian government signed the Memorandum of Understanding promoted by the Chinese Government regarding the cooperation within the framework of the Silk Road Economic Belt and the 21st Century Maritime Silk Road Initiative (“丝绸之路经济带”和“21世纪海上丝绸之路”). This MoU<sup>15</sup> contains a series of cooperation intentions from the two countries involved in the project of the new Silk Road, as clarified in its preamble and in the first paragraph of the document. Its function is mainly to organize the various themes of collaboration, the majority of which already existing, and reorganizing them under the umbrella of the New Silk Road, as a document with a systematic view of relations and cooperation between the countries.

The main areas of cooperation that the two states wish to promote are clearly asserted, and from its reading it is understood that the collaboration is not limited exclusively to projects in the fields of transport, logistics and infrastructure, which are the sectors that mainly identify the project of the new Silk Road, but includes several themes for a wide operational scope, including tourism.

With the MoU the two countries intended to establish synergies in six areas:

- Policy dialogue
- Transport, logistics and infrastructure
- Unimpeded trade and investment
- Financial cooperation
- People-to-people connectivity
- Green development cooperation

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<sup>15</sup> Memorandum of Understanding. This type of document, very widespread in institutional relations as well as in those between private companies, aims to confirm in writing a certain convergence of interests between the parties, indicating a common line of action. It is a document which, as stated in the same text (paragraph 6), does not represent an international agreement and which, by its generic nature and nature, has no binding effect between the parties (As the text expressly states that "none of the provisions of this Memorandum shall be interpreted and applied as a legal or financial obligation or commitment to the Parties").

Concerning this research, major interest is put on the fifth point, in which the parties focus on the connectivity between people, intended in the broader sense including interpersonal, cultural, academic, and institutional exchanges, with a certain attention to the promotion of tourism.

*“People-to-people connectivity: The Parties will endeavor to expand people-to-people exchanges, to develop their sister cities network, to fully utilize the platform of Italy-China Culture Cooperation Mechanism to cooperate for the finalization of the twinning among Italian and Chinese 5 UNESCO world heritage sites, to promote cooperation arrangements on education, culture, science, innovation, health, tourism and public welfare among their respective Administrations. The Parties will promote exchanges and cooperation between their local authorities, media, think tanks, universities and the youth.”*

The MoU continues with a paragraph dedicated to the modalities of collaboration and one paragraph on the mechanism of cooperation, where the Intergovernmental Committee Italy - China (the body coordinating bilateral relations set up in 2004 and chaired by the foreign ministers of the two countries) is entrusted with the task of monitoring progress and follow-up of the MoU. The object of the collaboration between the two states within the project of the new Silk Road is very extensive, in fact, the document is to be understood more correctly as something that goes to identify a broad general framework within which the two countries will operate. It also requires the signing of further agreements for its practical implementation.

The ancient Silk Road, born from the trade of precious goods transported by caravans that connected Europe and China (with the two opposite ends, respectively, Rome - where the state visit took place in recent days - and Xi'an, a famous city in the central area of China), over time, has acquired a greater symbolic value. Through the ancient Silk Road different languages, cultures, knowledge, and religions were also transported, so it can be considered a sort of precursor to globalization. The Belt and Road initiative takes all the positive attributes of the Ancient Silk Roads and adds economic and political motives to it, and the inclusion of Italy doesn't only depend on its position on the historical route: “Italy's place in the BRI is related to the peculiar position that Beijing awards to the country, [...] and even despite the grim picture of Italy's political and economic conditions, Chinese analysts are positive on Italy's place in the BRI. Italy enjoys the ‘geographic

advantage' (*diyuan youshi*, 地缘优势) of its location at the center of the Mediterranean Sea, where it plays the role of natural hub connecting mainland Europe, North Africa and West Asia."<sup>16</sup>

Two years after the signing of this document and President Xi visit to Italy, it is apparent that most agreements have not yet materialized, resulting in a slow development of the BRI related projects. As a matter of fact, most of the completed projects originated from agreements reached before the MoU<sup>17</sup>. The cause of the relative slow development of BRI projects can be linked to four aspects. The first two are external causes: Italy's collaboration with China was influenced by tensions between PRC and USA, and in particular the consequent pressure from Washington. Then, the Covid pandemic hindered the development of many projects, and especially blocked the people to people exchanges. The third reason is connected to the numerous changes that the Italian government underwent after the signing of the MoU. Finally, an important determinant is the difference in culture, identity and values between China and Italy.

According to this list of causes for the slow development of the BRI projects, a possible solution for the development of a better cooperation between China and Italy could be increasing human interactions and cultural exchanges, which should help improve mutual understanding by allowing the two partners to focus on common interests. Considering this, the image that both the Italian and Chinese population have of each other is an important factor to examine, a factor that can also weigh in on the decision of travelling to the other country. "In this scenario cultural diplomacy has an important role, being one of the strategies used by countries to improve their soft power abroad. [...] If the MoU-related projects will have a further development, it will be possible to demonstrate that the increase in people-to-people exchanges and positive mutual perceptions can benefit also the economic and political interactions between countries."<sup>18</sup>

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<sup>16</sup> DOSSI Simone, *Italy-China relations and the Belt and Road Initiative. The need for a long-term vision*, Volume 5 of "Italian Political Science", Società Italiana di Scienza Politica, 2020.

<sup>17</sup> JUNYI Bai, *Che cosa dice veramente il memorandum Italia-Cina*, Agi China, 2019.

Available at: [https://www.agi.it/blog-italia/agi-china/memorandum\\_italia\\_cina-5199831/post/2019-03-24/](https://www.agi.it/blog-italia/agi-china/memorandum_italia_cina-5199831/post/2019-03-24/)

<sup>18</sup> TRAVERSO Miriam, *The BRI and Italy-China Cultural Relations: An Overview of the "2020 Year of Culture and Tourism"*, The Twelfth International Convention of Asia Scholars (ICAS 12), Volume 1, p.724 – 735, 2022.



### 1.2.1 The BRI symbolic value

The initiatives that come from the MoU and weren't already put into practice before now, as of beginning of 2023, all seem to have more of a symbolic value to improve each country's respective image. When considering the concepts listed above, it's easy to see that 2020 was a crucial year for the development of Sino-Italian relations, as it was declared the Italy - China Year of Culture and Tourism. This event had the aim of promoting the collaboration which started with the signing of the MoU, as this celebration has been the first joint state-scale initiative promoted by the two countries, with a focus on improving cultural and interpersonal exchange, but also to celebrate the long-standing existence relations between the two countries since 2020 is also the 50th anniversary of their diplomatic relationship. The decision to postpone to 2022 and not cancel this event demonstrates the will of Italy and China to proceed with the cooperation.

Excluding the pandemic, even though the data have shown a gradual increase in the flow of Chinese tourists visiting Italy, up until now the factors contributing to the growing number of visitors have been independent of the BRI and the MoU<sup>19</sup>. One element causing this growth is the fact that Italy has facilitated the process of issuing visas for Chinese tourists, mainly with the opening of new visa centers directly in China and reducing the wait time for obtaining it. Another component that is influencing this increase has been continuously growing number of Chinese people with a passport and choosing to travel abroad, mainly for the younger generations of Millennials and Gen Z. Furthermore, the fact Chinese tourists are now more technological has allowed them to discover Italy beyond the traditional tourist destinations such as Venice, Rome, and Florence and choose less popular locations (internationally speaking) such as Sicily, Amalfi, and the area of "Cinque Terre".

To summarize, it can be said that in relation to tourism the value of this MoU and promise of collaboration has been more symbolic than concrete, without having notably influenced the Chinese tourist's influx in Italy at present. However, its symbolic value could lead to an increase in the number of Chinese tourists visiting in Italy in the long term, as Italy would gain notability among Chinese people and push them to choose it as a travel destination. To predict the new data of tourism influxes, an analysis of the history of Chinese tourism in Italy should be taken into consideration, to see which was the scenario before COVID and which measures taken by the

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<sup>19</sup> POLITI Alice, *Italy: a case study of the Silk Road Project in Europe*, Policy series: China in the world, LAU China Institute of the King's College of London, 2020.

government where effective in the past. In conclusion, while the initiatives stemming from the MoU between Italy and China may not have had a significant impact on Chinese tourism in Italy thus far, their symbolic value is not to be underestimated as the joint celebration of the Italy-China Year of Culture and Tourism in 2022, despite the challenges posed by the pandemic, represents a clear commitment to collaboration and cultural exchange between the two countries. By fostering greater understanding and appreciation between the two nations, the MoU has the potential to strengthen ties and promote sustainable growth in tourism and other sectors.

### 1.2.2 The new Maritime Silk Road and benefits for tourism

Another aspect of the Belt and Road initiative is the development of the 21st Century Maritime Silk Road – “21 世纪海上丝绸之路”, which has the aim to connect China and Europe via ports traversing through South-East Asia, India, Africa, and the Mediterranean. The plan is to develop new infrastructural construction and cooperation plans along the main Asia–Europe shipping routes in order to create a network of ports for trade and naval uses, with the Grecian Port of Piraeus and Venice in Italy as key termini. One of the key features of the Belt and Road Initiative and the Maritime Silk Road is that both large scale maritime projects and onshore activities are strongly linked and planned in a way so that they can stimulate each other, with the integration of sea and land routes and the removal of bottlenecks to aid smooth connections as a central part of the framework. This project is also aimed at maintaining China significant role in the international shipping industry, and as the latest initiatives, Chinese companies are participating in these ports construction and management. This improved integration objective is to boost future sources of economic growth for China, impacting the trade and economy of the whole region.

The effects of the new Maritime Silk Road as for now are not much different than the ones of the Belt and Road initiative, with the development forcibly arrested by the Covid Pandemic. Focusing on the project at large, though, as a result of this project tourism associated to port and other forms of maritime infrastructure will most certainly develop, with an increased interest in coastal areas as travel destinations. Due to the new connections and opportunities that the Maritime Silk Road brings with it, business tourism will also expand, since other than maritime routes there are also further investment planned for new and existing air routes. New flights have already been

announced from China to other Silk Road countries, boosting overall tourism accessibility. There will also be an improvement in international linkages, new tourism markets and new tourism destinations will become more accessible.

“The integrated approach to development of the Belt and Road Initiative will facilitate tourism growth. Deepwater berth facilities will be available for increased cruise tourism. Business tourism will prosper based on increased trade. The rich maritime heritage of ancient harbors and trade routes could find a new purpose. New facilities will see growth in the MICE tourism sector, and sports tourism could become a new tourism theme in the region. While development zones will attract high investments, economic, social, and environmental criteria will have to be respected and enforced in order to ensure tourism sustainability.”<sup>20</sup>

So, for the geography of tourism, the proposed infrastructural developments will have a significant impact, also influencing the tourism offering. Improved transportation links from ports to land routes will make previously unknown destinations more accessible to international tourists, and the growth of cruise tourism will also be facilitated. These are all speculations for now, but as for the Belt and Road initiative as a whole, the symbolic meaning of it is still a first step for the promotion of cooperation between China and the participating countries, with the honorable mention of Italy as the end of the Maritime Silk Route with the Venetian Port.

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<sup>20</sup> World Tourism Organization, *The 21st Century Maritime Silk Road – Tourism Opportunities and Impacts*, UNWTO, Madrid, 2019

## 1.3 HISTORY OF CHINESE TOURISM IN ITALY

China can be considered a first-class power that greatly influences the world of tourism, and now with the increasing percentage of its citizens that have obtained a passport, attracting Chinese touristic influxes is more relevant than ever. According to Statista, “over the last decade, the issuance of ordinary passports has been on the rise in China. In 2018, the Chinese government issued around 30 million ordinary passports, representing over a five-fold increase compared to 2007. Over 170 million people were holding a Chinese passport that year.”<sup>21</sup> Understanding the development of *outbound tourism* (visits by residents of a country outside that country) provides this research a needed background to start from when considering new policies and strategies to adapt to benefit the Italian tourism economy.

Even when considering the relatively young history of tourism in China, its rapid and steady growth puts the Chinese market in first place as a source of potential touristic influxes. Italy, as an important player in this market, “has a significant advantage as a cultural destination and in particular as a destination for the training in specific sectors such as opera music, art and art restoration. The smart plan of action put into practice by our consular network to overcome the possible barrier of the EU dispositions puts Italy at a vantage point compared to other European tourists’ destination (with the opening of new visa centers) and improves Italy’s popularity for tour operators and individual clients.”<sup>22</sup> In this chapter, the focus will be on the effect of Italian and Chinese policies and State initiatives before the pandemic, as a starting point to then consider the currently still evolving situation for the tourism recovery.

### 1.3.1 Regulations of Chinese Outbound Tourism

Chinese tourism is a relatively young phenomenon that started to develop in the late eighties, thanks to a series of policies that the Chinese government issued and a change in ideology. Before the eighties and therefore before the rise of Deng Xiaoping, we can say that tourism in China was a topic linked exclusively to political and economic purposes. During the Maoist Era China was

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<sup>21</sup> <https://www.statista.com/statistics/1107607/china-number-of-ordinary-passports-issued/>

<sup>22</sup> STURLA Simone, *Viaggiare è commodity e status symbol*, in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, p. 99-108, 2016

substantially “closed”, limiting the possibility for its citizens to travel abroad for both ideological and economic factors. Even regarding domestic tourism, it was seen in a negative light as a symbol of bourgeois well-being.

Starting from the Chinese economic reform and its opening up process, during the eighties there has been a huge increase in laws and regulations for tourism. “A model that is used by many authors to describe the development of tourism in China is characterized by 3 different phases: first, from 1949 to 1978 the main driver for travel and tourism was political motivation; second, from 1978 to 1985 to the political reasoning it was added the economic one, with more value given to travelling abroad; third, from 1986 the economic motivation prevailed over the political consideration.”<sup>23</sup> Even if international travel wasn’t permitted instantly after the issuing of the open-door policy, the government has slowly relaxed its control on outbound travel over the years, recognizing tourism to be a mean to modernization and economic development.

Focusing on *outbound tourism*, there are some important events that defined the history of its development: the first step can be considered to be made in 1983, when PRC citizens of mainland China were permitted to visit relatives in Hong Kong, permit which then developed into the issuing of the VFR Visa (Visit for relatives). During this period of time, one-day trips for business reasons to neighboring countries were also permitted, mainly to URSS, North Korea, Vietnam, Hong Kong and Macau.

During the 1990’s, the Chinese government began to authorize organized trips of its citizens abroad, granting, only to countries which negotiated bilateral agreements, this marked the first ADS list - Approved Destination Status. These destinations were granted by the Chinese National Tourism Administration (CNTA) and the Ministry of Public Security (PSB). Without ADS, any foreign country cannot receive Chinese tourists. By the end of the decade there were just nine countries with and ADS agreement with China, but starting from the 2000 this number accelerated sharply<sup>24</sup>. In 2001 China becomes part of the World Trade Organization and starting from 2004 different EU countries joined the ADS list, including Italy. After the signing of the “Memorandum of Understanding Between the Government of the Peoples Republic of China and Government of the United States to

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<sup>23</sup> FASULO Filippo, *Cina e turismo. Dati e statistiche*, in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, p.55-70, 2016.

<sup>24</sup> See Table 1 for the list of Approved destination status (ADS) agreements by year.

Facilitate Tourist Group Travel from China to the United States” the US also obtained the ADS. These years have also seen an increase in the number of travel agencies authorized to operate in the outbound tourism sector. Before this regulation, Chinese citizens could only travel abroad at official business events or for study purposes, and still they had to obtain special permits that were always subject to strict restrictions. Pleasure trips abroad did not exist or were masked by different motivations.

Observing the Economic Analysis of the Impact of approved destination status on Chinese travel Abroad, the results provide evidence that ADS status has substantially increased mainland Chinese visitor arrivals in ADS countries. The fixed effects estimates found that three years after receiving ADS, the number of mainland Chinese visitors increased by an average of between 34.6 and 52.1 percent<sup>25</sup>.

From the perspective of the Chinese government, granting this gradual liberalization provided major advantages: first, it allowed the country’s leadership to meet the domestic demand of the most economically wealthy citizens who wish to travel abroad. At the same time, it enabled political leaders to adapt to and monitor this new tourism offering, building on initial experiences in the first ADS countries. Since the countries that obtained the designation of ADS plan to obtain substantial economic benefits, an ADS agreement represents a bargaining that the Chinese government can exploit in its diplomatic negotiations, benefiting from other key issues in strengthening relations with other countries.

### 1.3.2 Tourism influxes from China to Italy

After considering the importance of the “*Approved destination Status*” issued by the Chinese Government, the next step for this research is defining its results for Italy.

Based on ISTAT data from 2005, the year after the Chinese government granted ADS status to Italy, the growth of Chinese tourists in Italy begins to increase and, within five years, there is a growth trend both in the number of arrivals (+33.3%) and in attendance (+28.3%), data that seems to be in

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<sup>25</sup> ARITA, EDOMONDS, LA CORIX, MAK; *The Impact of Approved Destination Status on Chinese Travel Abroad: An Economic Analysis*; Working Paper No. 09-18, 2009.

line with the above mentioned economic analysis on the impact of approved destination status on a country.<sup>26</sup> Compared to the following decade though (except for 2020), these numbers seem really small, and if it weren't for the stop of travelling because of COVID the positive curve would have continued to grow.

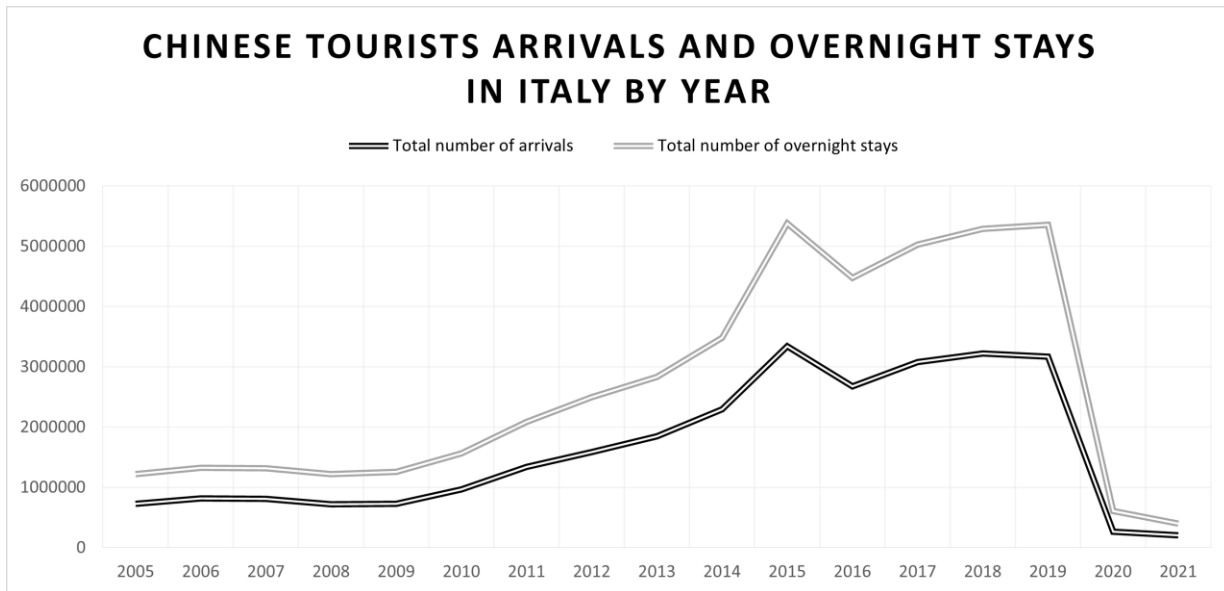


Figure 1: Chinese tourists' arrivals and overnight stays in Italy by year<sup>27</sup>

As for more recent statistics, “according to data provided by the China National Tourism Administration, whereas in 2010 Italy was the fourth European country by number of arrivals and presences after France, Germany and Great Britain, in the course of 2011 and 2012 it was the most popular European destination among Chinese tourists. Although this was an ephemeral victory, considering that in 2013 Italy was narrowly overtaken by France, interest in Italy has remained high, fueled by the awarding of the Universal Exposition to Milan in 2015, the opening of an Italian Consulate in Chongqing in 2014 and the creation of preferential channels for the release of visas for individual journeys, which led to the rejection rate falling to 2% (data from ISTAT).”<sup>28</sup> Considering data from the 2020 yearly statistical report for tourism, it can be observed that after the peak of 2015 the number of tourist arrivals from China have maintained a substantial stability, with a 0,2% percentage points increase in the proportion of Chinese tourists in the total foreign attendance. This

<sup>26</sup> *Ibidem*

<sup>27</sup> See the annex “Table 2” for the specific data used to create the graph, divided by arrivals and overnight stays in hotel establishment and other types of accommodation establishments.

<sup>28</sup> GRAVILLI Silvia, ROSATO Pierfelice, *Italy's Image as a Tourism Destination in the Chinese Leisure Traveler Market*, International Journal of Marketing Studies; Vol. 9, No.5; 2017

accounted for the 2,4% of Chinese tourists in the total number of foreign tourists in Italy<sup>29</sup>, putting China in second place for the number of incoming tourists from a country outside Europe, second only to the USA.

Some other important factor to consider is the spending of Chinese tourists in Italy, and the most significant figure is the total expenditure, which in 2018 recorded a record increase of 40.8%. Looking at the Banca d'Italia data published by Enit, in regard to spending the region in first place for Chinese tourism in 2018 is Lombardy (174.3 million), followed by Lazio (126.9 million), Tuscany (122.7 million), Veneto (103.6), and Piedmont (47): these regions together collected 88.4% of the total Chinese spending in Italy.<sup>30</sup> This data should be enough to drive the creation of new policies to attract more tourists from the PRC.

A key issue for Italy and a major obstacle for the influx of Chinese tourists to Italy is visas. In terms of direct arrivals, in 2015 the Italian diplomatic and consular network in China dealt with 555.000 visa requests: 87,4% for leisure tourism, 8,5% for business, 1,4% for study purposes, 0,8% for family reasons and 0,1% for work. The main channel to obtain these visas has been the Beijing Embassy, with 279.596 visas released accounting for a 27,1% increase in comparison to 2014<sup>31</sup>. This was also the results of a 2012 action by the Italian Embassy, which strengthened its activity in China by increasing the number of dedicated staff, thus making the whole process smoother. Visas have always been a vital matter when dealing with tourists from China, and from 2014 to 2017 Italy has been the fastest country to issue visas for Chinese citizens wishing to travel to Italy. It is also fair to note that the process of obtaining a visa to visit any of the Schengen countries have been simplified, with the regulation (EC) No 810/2009 of the European Parliament and of the Council of 13 July 2009 establishing a Community Code on Visas (Visa Code), with the development of three different types of visas: the Uniform Schengen visa, that permits travel for 90 days in any of the member states, the Limited territorial validity visa, that permits travel to only specific countries and the National Visa, that includes only a single country but for a longer period of time and it must be requested to the

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<sup>29</sup> ISTAT (Italian National Statistical Institute), Italian Statistical Yearbook, 2020.

See Table 2 in the Annexes for the specific data.

<sup>30</sup> Ansa, "Turismo cresce tra Italia e Cina, i numeri", 2020.

source: [https://www.ansa.it/canale\\_viaggiart/it/notizie/mondo/2020/01/21/turismo-cresce-tra-italia-e-cina-i-numeri\\_f9597101-9de2-4a48-87e1-a787e38a209e.html](https://www.ansa.it/canale_viaggiart/it/notizie/mondo/2020/01/21/turismo-cresce-tra-italia-e-cina-i-numeri_f9597101-9de2-4a48-87e1-a787e38a209e.html)

<sup>31</sup> FASULO Filippo, *Cina e turismo. Dati e statistiche*, in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, p.55-70, 2016.



embassy or the dedicated visa center of the singular country<sup>32</sup>. Even considering this seemingly positive data, it's still reasonable to say that Italy could improve some more. Chinese citizens can obtain visas for certain countries through apps, bypassing all the bureaucracy that Italians know all too well, and a Visa for the USA can last up to 10 years.

As the Italian Embassy in Beijing visa guidelines cite:

*"The Embassy of Italy processes individual tourism and business visa applications in two working days (36 hours) from passport delivery at the Embassy; in case controls cannot be done in 36 hours longer processing time might be needed. According to the Schengen Visa Code all decisions must be given within 15 calendar days, extendable to 45 days. For national visas the processing time is of 90 days, shortened to 30 days for family reunion and salaried work, and lengthened to 120 days for self-employment work.*

*We do recommend lodging visa applications well in advance (at least 15 days prior to departure date). Applications cannot be lodged earlier than six months before the start of the intended journey."*<sup>33</sup>

As it is evident from these guidelines, Italy is committed to address these issues and since 2015 it has started the issuance of visas for FIT (individual) tourists, subject to further special investigations, in 36 hours from the arrival of the passport in the Consulate.

Giancarlo Dall'Ara, president of "Chinese Friendly Italy" and expert in the topic of Chinese tourists in Italy, for years has been the first to sustain the liberalization of visas. "The European Travel Commission recently published a report quantifying the potential impact of visa facilitation for Chinese travelers who want to come on holiday to Europe. The results show that the liberalization of visas in addition to increasing arrivals from 7 to 18% each year, generating additional expenditure of 12.5 billion euros per year, would increase jobs by 237 thousand units, with an increase in European GDP of 1%"<sup>34</sup> Considering this, it is evident that the issues surrounding Visas are one of the first aspects to face and improve for the Italian government to increase tourist's influxes from China.

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<sup>32</sup> Source: <https://www.schengenvisainfo.com/>

<sup>33</sup> [https://ambpechino.esteri.it/ambasciata\\_pecchino/en/informazioni\\_e\\_servizi/visti/](https://ambpechino.esteri.it/ambasciata_pecchino/en/informazioni_e_servizi/visti/)

<sup>34</sup> DALL'ARA Giancarlo, *Introduzione al mercato turistico Cinese*, "Chinese Friendly Italy", 2019.

## 2 IMPACT OF COVID-19 ON CHINESE OUTBOUND TOURISM

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Having defined all the official initiatives and the current state of relationships between the two countries, the next important step for this research is to look at the enormous impact that the COVID-19 Pandemic has had on the global tourism industry, especially regarding China. The World Health Organization (WHO) on the 30<sup>th</sup> of January 2020 declared the outbreak to be a public health emergency of international concern, and later characterized it as a pandemic on the 11<sup>th</sup> of March 2020.<sup>35</sup> This caused long-term damage to the global economy, and the tourism industry has been one of the most affected.

“The United Nations World Tourism Organization (UNWTO) reports that almost all countries have implemented travel restrictions of one sort or another, such as travel bans, visa controls and quarantines (UNWTO 2020). As a result, international tourism was almost totally suspended in April and May of 2020. Inbound tourist arrivals declined 74 per cent between January and December 2020, about 1 billion trips. However, if the pre-COVID months of January and February 2020 are excluded, the fall in arrivals amounts to 84 per cent.”<sup>36</sup> The socio-economic impacts of these travel bans imposed by the governments have been really harsh, and due to the strict measures taken by the PRC, China’s travel industry has been slower to recover than other countries with the official reopening of its borders happening on January 8, 2023.

In this chapter the focus will be the tourism sector as a whole, with the analysis of the path of tourism recovery and the major official events that characterized the period of time between March 2020 and January 2023, to then explore in the next chapter the travel trends deriving from it.

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<sup>35</sup> World Health Organization, <https://www.who.int/europe/emergencies/situations/covid-19>

<sup>36</sup> United Nations Conference on Trade and Development, *COVID-19 and tourism: an update*, 2021

## 2.1 TRAVEL INDUSTRY RECOVERY PATH

There are mainly two channels through which COVID-19 has affected the tourist demand. The first was the consequent refraining of tourists from travelling due to the concern of the virus, and the second one were the travel restrictions imposed by the governments to reduce the transmission of the virus in the early stages because of the absence of a vaccine. The Chinese government banned international tourists from most countries, and then it imposed a compulsory two-week long quarantine upon arrival, which caused the nearly complete shutdown of the outbound tourist market in China.

Being one of the driving forces in the global outbound tourism industry, the three-year absence of Chinese tourists was more than evident. From the high peak of 2019, when the number of outbound tourists reached nearly 155 million, it significantly dropped to around 20.3 million in 2020.

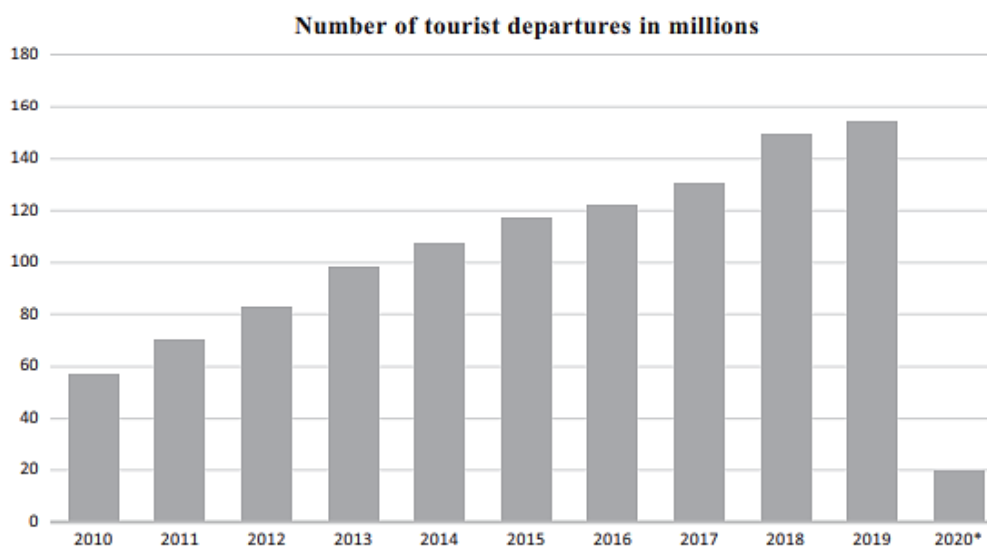


Figure 2 Number of outbound tourists from China between 2010 and 2019, with an estimate for 2020.<sup>37</sup>

As President Dai Bin of China Tourism Academy stated in his article “The impact of the Coronavirus Epidemic on the Tourism Industry and countermeasures”, the PRC government has always been

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<sup>37</sup> WEN Jun, KOZAK Metin, *Chinese Outbound Tourist Behavior, an International Perspective*, Routledge, 2022.

focusing on the prevention and containment of the virus, being aware that this would have caused a substantial impact on the travel and hospitality sector.

“引导行业主动担责，彰显负责任的旅游形象。全国旅游活动有组织降温直至停止，在有效阻断疫情经由旅游活动而传播和扩散的同时，也让旅行社、OTA、住宿、景区、购物等旅游企业承受了巨大的损失，承担了前所未有的财务和就业压力。从这个意义上说，旅游业从一开始就处于抗疫的第一线。”<sup>38</sup>

*Guiding the industry to take responsibility and demonstrate a responsible image of tourism. Tourism activities throughout the country have been organized to subside to then reach a complete stop. While effectively blocking the transmission and spread of the epidemic derived from tourism activities, travel agencies, OTAs, accommodation, scenic spots, shopping, and other tourist enterprises have suffered huge losses, bearing unprecedented financial and employment pressures. In this sense, tourism has been at the front line of the fight against the epidemic from the outset.*

Looking at the industry as a whole, the effects of COVID-19 on China's tourism sector can be summed up into short-term and long-term effects (based on a study by Yuqian Sun, 2022<sup>39</sup>). The short-term effects include a direct and sharp reduction of business volume, a significant reduction of revenue, and a severe damage to tourism related industries. A study published on Tourism Economics on the impact of Covid-19 on the Chinese tourism industry has shown that all the economic sectors closely related to tourism (such as restaurants, accommodation, entertainment, rail and air transports) have all suffered a decrease in their revenues by 30% to 97%, and although the economic prevention and control measures reduced the impact on all sectors significantly, the impact on the tourism related sectors has still been substantial<sup>40</sup>. The long-term impact on the industry can also be considered sort of an “indirect effect”, with the shrinking of the tourism market and the discouragement of tourists' travel intention and tourism entrepreneurship environment, causing a

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<sup>38</sup> DAI Bin (President of China Tourism Academy, 中国旅游研究院, 文化和旅游部数据中心), 《新冠疫情对旅游业的影响与应对方略》, 《The impact of Coronavirus Epidemic on the Tourism Industry and countermeasures》, 2020.

Source: <http://www.ctaweb.org.cn/cta/xsjl/202103/4b11ef2cb6234ab9a0648947dd1ea5c2.shtml>

<sup>39</sup> SUN Yuqian, *Review of the Influence of Covid-19 on China's tourism*, “Advances in Economics, Business and Management Research”, volume 648, 2022.

<sup>40</sup> WANG Can, MENG Xianming, SIRIWARDANA Mahinda, PHAN Tien, *The impact of COVID-19 on the Chinese Tourism Industry*, Tourism Economics, Volume 28, pages 131-152, 2022.

crisis with the sudden interruption of the development in the sector. The outbreak of the epidemic also has an impact on tourists' behavior and psychology, causing the need for a restructuring of the industry.

To summarize, the pandemic has initiated a cascading effect on tourism: with the closing of all tourism businesses after the imposition of lockdowns, and due to the fact that tourism enterprises are a service industry supported by passenger flows, the occupancy rate of hospitality has also decreased, making this sector the most affected by the crisis following the Covid outbreak. This arose the need for the tourism industry to focus on the details of health services and proceed towards the normalization of epidemic prevention and control measures, considering that the influence of Covid-19 seems to have caused long-term effects. The economic consequences of it on tourism development are mainly the direct decline in revenue and the failure of the industry to achieve the original target revenue.

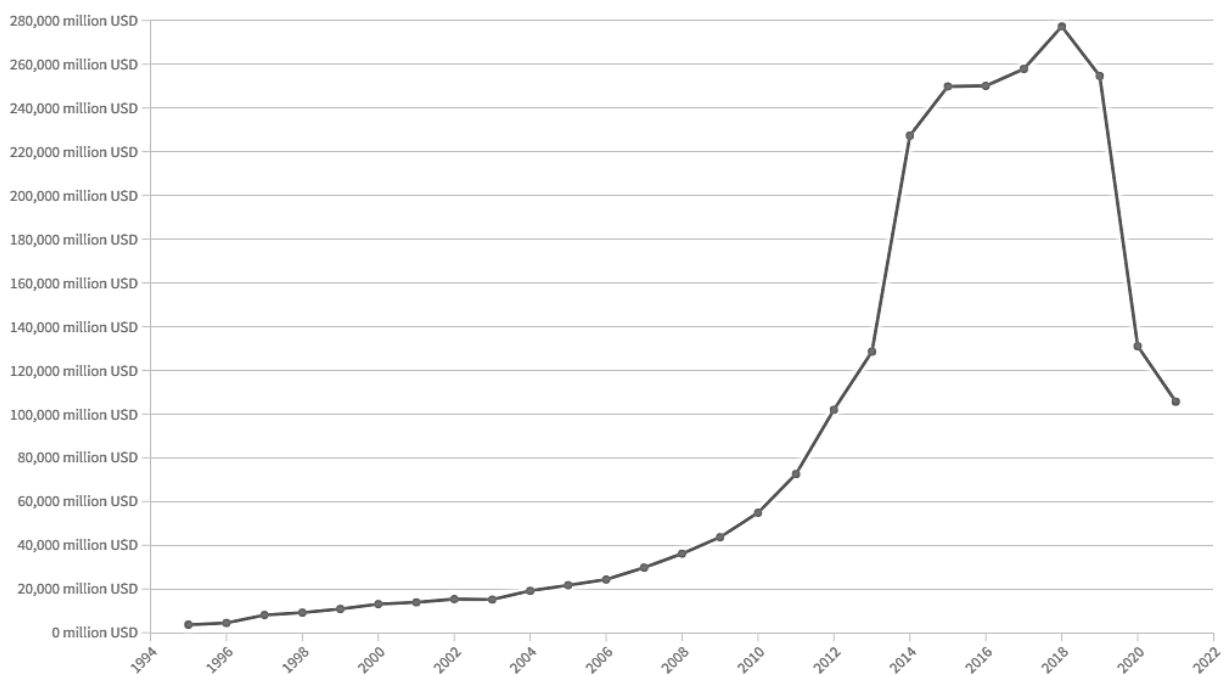


Figure 3 China Outbound tourism expenditure, UNWTO<sup>41</sup>

Considering the economic aspects of it, looking at the outbound tourism expenditure by Chinese tourists brings into perspective the amount of losses that the global tourism economy has experienced. Taking into account the fact that on average this sector accounts for 3.5% of the global

<sup>41</sup> Data from the UNWTO Tourism Statistics database, collected in January 2023  
source: <https://www.unwto.org/tourism-statistics/tourism-statistics-database>

GDP, this contribution mainly includes industries that directly deal with the tourism and travel segment, such as hotels and accommodation facilities, airlines and other transport services, travel agencies and tour operators, but it also include indirect activities such as restaurants and leisure industries.

The impact is not only related to direct loss of revenue, but it also affected the occupancy rate and the investments and financial sector. “Economic strains in MSMEs as much as larger-service industry firms, such as airlines, could have spillovers to the financial sector, further hampering the recovery. As the pandemic is protracted, liquidity problems can transform into solvency ones, straining the capacity of the tourism sector to repay its debts, further endangering the economic outlook. While MSMEs, tend to be less resilient to shocks, the severity of this pandemic is also impacting large players (international hotel and restaurant chains, global and low-cost airlines, packaged tour operators).”<sup>42</sup>

The way in which governments worldwide have supported tourism recovery is to adopt support measures and policies, and with the gradual lifting of the travel bans the levels of outbound and inbound tourism with their related contributions on economy are going back to pre-pandemic levels. Following a UNTWO study on the first response of countries to counteract the impact of the pandemic and how they supported tourism recovery<sup>43</sup>, the overall finds were: government’s response worldwide has been fast and effective, with most countries adopting stimulus packages, both fiscal and monetary measures, to support the economy. The aim of these measures has been to provide fiscal relief, support SMEs and self-employed workers, and secure employment, mainly for the tourism sector as the one which suffered most losses. In countries where tourism plays a significant role in the national economy, the measures issued have been more substantial, with the reinforcement of public-private partnership models and a quicker issuing of safety protocols and measures to restart and promote domestic tourism.

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<sup>42</sup> GORETTI Manuela, LEIGH Lamin, *Tourism in the post-pandemic world: economic challenges and opportunities for Asia-Pacific and the Western Hemisphere*, International Monetary Fund, 2021.

<sup>43</sup> World Tourism Organization, *UNWTO Briefing Note – Tourism and COVID-19, Issue 1 – How are countries supporting tourism recovery?*, UNWTO, 2020.

## 2.2 REBUILDING TRAVEL SENTIMENT

With the lift of outbound travel restrictions from China in January 2023, the return of Chinese visitors in the international travel market is starting again. The rebound of Chinese tourism of course won't be immediate, since it will take some time for the renewal of passports and the process for obtaining a visa to go abroad. But besides these impediments for administrative reasons, an important factor to consider is the actual travel sentiment of Chinese people after three years of lockdowns and travel bans. Seeing the scale of China's outbound travel market, the share of early adapters to this change will certainly be significant, but for the most part an important amount of tourists will still need some time to readjust.

During 2020 and 2021, with the high number of travel bans and lockdowns imposed globally, Chinese people felt safer travelling domestically. This was possible because of some PRC Government's measures, with social distancing measures and mandatory nucleic acid testing, controlling both individuals and the possibility to travel in and out of certain areas. With the help on QR codes and travel tracking it was possible to define safe zones which changed depending on the infection rate in the area, so it was easier for Chinese citizens travelling within China to choose an internal destination feeling safer about their choice. As an example of the results of these measures, looking at a McKinsey study from October 2020, it was evident that the actions taken by the government to boost domestic travel and disincentive outbound travel have been more than effective. "Consumers were asked to rank their confidence in a number of different forms of travel on a scale of one to five, where one represented "not safe at all" and five represented "completely safe." Safety perceptions have increased significantly since May (2020) for domestic leisure trips and would rapidly approach completely safe level. Outbound trips, by contrast, are still considered unsafe."<sup>44</sup>

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<sup>44</sup> CHEN Guang., ENGER Will, SAXON Steve, YU Jackey, *What can other countries learn from China's travel recovery path?*, McKinsey & Company – Travel, logistics and infrastructure insights, 2020.  
Source: <https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/what-can-other-countries-learn-from-chinas-travel-recovery-path>

“How safe do you feel about the following types of travel in the coming one month? Please rate on a 1–5 scale,” average safety-assessment score by respondents (weighted)

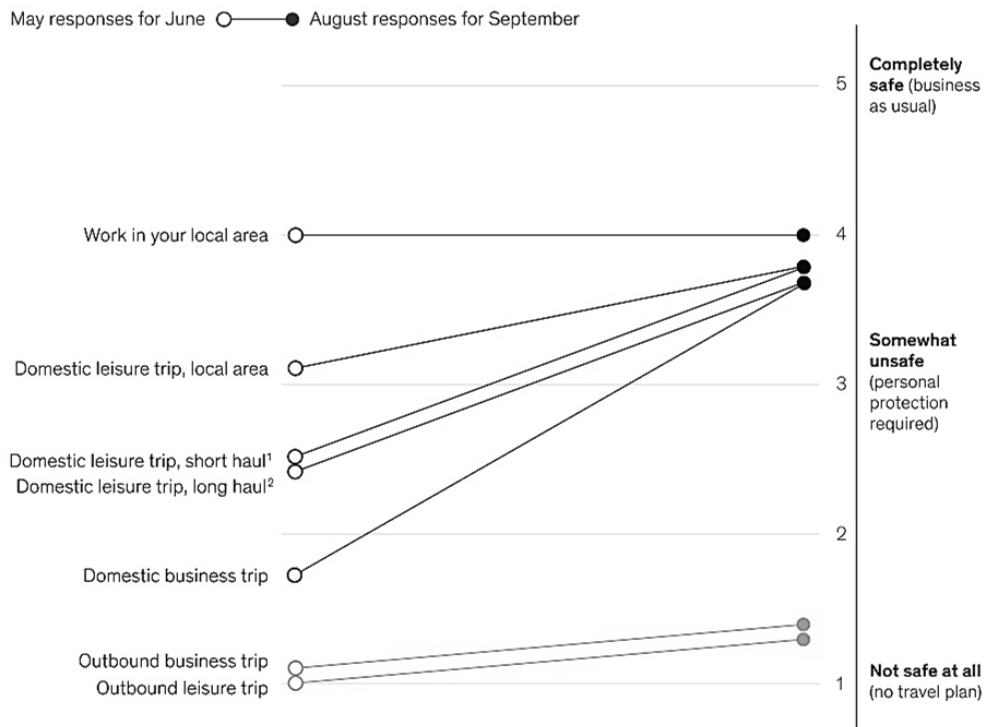


Figure 4 Travel confidence, Survey by McKinsey Company, 2020<sup>45</sup>

The follow-up study by McKinsey continued to monitor Chinese people travel sentiment in the following year, finding that “even though 43 percent of respondents are eager to go overseas for vacation, most people feel that international travel, be it for business or leisure, remains completely unsafe. Most take a dim view of other countries’ management of the pandemic and are concerned about the dangers of infection from overseas travel. In addition to the risks of contracting COVID-19 abroad, the long, mandatory quarantines required after returning to China are also a major deterrent.”<sup>46</sup> In this case, more so than travel confidence, the main variables that impacted Outbound tourism in 2021 and 2022 have been the various restrictions imposed by the government and companies.

<sup>45</sup> *Ibidem*

<sup>46</sup> CHEN Guang., ENGER Will, SAXON Steve, YU Jackey, *China’s travel sector is undergoing a nonlinear recovery: What should companies do?*, McKinsey & Company – Travel, logistics and infrastructure insights, 2021.

Source: <https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/chinas-travel-sector-is-undergoing-a-nonlinear-recovery-what-should-companies-do>



As for 2023, Chinese travelers desire to go abroad is growing. An interesting phenomenon derived from the pandemic has been “Revenge travelling”. As a study by Wang J. and Xia L.<sup>47</sup> demonstrated, the phenomenon of "revenge travel" is driven by psychological resilience, which acts as a motivator for people to travel again after the pandemic. To encourage tourism recovery, nostalgia should be used to rebuild travel sentiment. This information is important for tourism companies, which should take proactive measures to cultivate consumers' desire for leisure travel, and nostalgia can be incorporated into marketing campaigns, using social media platforms as an effective way to communicate these ideas. By using nostalgia in content, marketers can generate excitement and reduce hesitations for post-pandemic travel among friends and families. It's important to note that nostalgia can create a future-oriented mindset, and companies that use continuity and nostalgic messages together can better foster consumers' psychological readiness and excitement for travel.

This phenomenon of “revenge travelling” can be seen in practice from the data about travel sentiment after the reopening. Based on a survey by Dragon Trail Int. which monitored Chinese desire to travel after the announcement by the PRC to lift the international travel restrictions, “more than 60% of respondents say they want to travel outside mainland China this year (2023). The remaining 39.4% either have no plans to travel, or will only travel domestically. So, when can we expect the Chinese travel market to return? While 29% might travel in the first six months of the year, it will be the second half of 2023 that truly sees a recovery. 42% said they plan to travel outbound in July and August, with a further 32% planning cross-border trips for the Mid-Autumn Festival and National Day Golden Week holiday from 29 September-6 October.”<sup>48</sup> Considering this, it will take some time to go back to pre-pandemic levels of Chinese outbound tourism, especially looking at Europe, as Chinese people prefer closer destinations such as Thailand, Japan, Hong Kong and Macao, being more closely connected and requiring less investment of time and money to visit. Other factors to consider in regards of travel impediments are certainly the higher prices of transportations and accommodation, the longer times to obtain a visa due to the fact that foreign consulates have reduced staff, and the current lack of flights which will need some time to be

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<sup>47</sup> WANG Joyce, XIA Lan, *Revenge travel: nostalgia and desire for leisure travel post COVID-19*, Journal of Travel & Tourism Marketing, vol.38, pg.935-955, 2021.

<sup>48</sup> PARULIS-COOK Sienna, KADEERBIEKE Yelinuer, *Ready to see the world - Chinese Traveler Sentiment Report*, Dragon Trail Research, January 2023.

resumed. So even if travel sentiment is high, this doesn't directly translate to an immediate return to pre-pandemic levels.

The same study by Dragon Trail Int. explored the reason for the 39,6% of the respondents who didn't plan to go abroad, and the majority of these are linked to the Covid Pandemic.

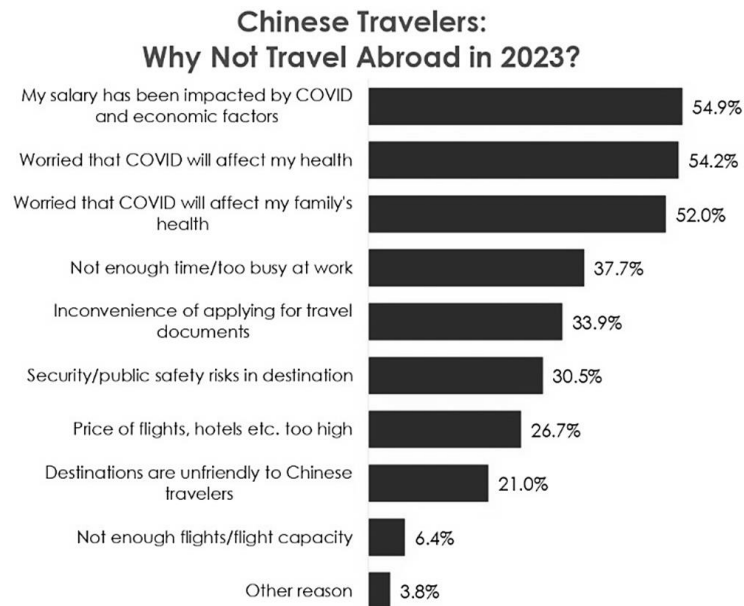


Figure 5 Motivations for avoiding outbound tourism in 2023, Dragon Trail International<sup>49</sup>

Other useful data to consider when measuring Chinese tourist travel sentiment are Online travel agencies (OTAs) booking data, collected by the consulting firm "Value China" in January 2023<sup>50</sup>. They have found that the announcement of the reopening of the borders was greeted with great enthusiasm by Chinese citizens, so much so that the main Chinese tourist booking platforms have recorded an increase in searches related to destinations and hotels abroad. Qyer.com recorded a +400% search for destinations and accommodation and a +280% for content related to visas and documents for outbound tourism. This data shows a real positive trend in searches for destinations and travel information, demonstrating an autonomous rebuilding of travel sentiment in China, which countries such as Italy need to direct towards themselves.

<sup>49</sup> *Ibidem*

<sup>50</sup> <https://valuechina.net/2023/01/24/turismo-dalla-cina-i-trend-di-viaggio-outbound-2023/>

## 2.3 HOSPITALITY INDUSTRY TRANSFORMATION

As health worries fade, tourism enterprises are facing new significant challenges, such as labor shortages in the hospitality and travel sector, consumer financial anxiety, and the growing concern brought by climate change. So, other than the new needs and changing characteristics of tourists, companies need to focus on In this scenario, “2023 will be a year of coming to grips with some complicated realities facing travel. The year ahead in the travel industry will be defined by the basics—product, performance, and price— in the context of economies and societies reshaping themselves on the way out of a once-in-a-generation crisis.”<sup>51</sup> This means that after a year of return for the tourism industry, the next one will require a sort of recalibration and, for companies, a need for transformation.

Following an Accenture report by Ha Yihui and Jiang Yuxing, titled “Chinese tourism industry challenges and opportunities under the Covid Pandemic”<sup>52</sup> (新冠肺炎疫情下中国旅游业的挑战和机遇), the four opportunities that they distinguished for companies during this industry restructuring are the following:

- Industry consolidation and strategic expansion

Small and medium size enterprises, being the ones most at risk because of the losses caused by the pandemic, possess high-quality assets that can be acquired by large enterprises with sufficient cash-flows and financing capabilities, integrating the industry under a strategic framework.

- Customer Interaction and proactive initiative

Tourism companies had a rapid response to the epidemic, with measures appreciated by customers such as more flexible refund policies, information transparency, and membership plan extension. Looking at the growing presence both in number of users and hours spent online by Chinese consumers, it is critical for enterprises to grasp customers' attention through online content and interactions, establishing contact and loyalty.

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<sup>51</sup> CROWLEY Eileen et al., *2023 travel industry outlook – Travel moves from a year of return and resurgence into a period of recalibration and repositioning*, Deloitte Insight, 2023.

<sup>52</sup> HA Yihui 哈亿辉, JIANG Yuxing 蒋宇星, “新冠肺炎疫情下中国旅游业的挑战和机遇” *Chinese tourism industry challenges and opportunities under the Covid Pandemic*, Accenture Strategy - 埃森哲战略, 2020.

- Business innovation and platform cooperation

Enterprises aim to improve their operational performance and can do so by exploring innovative business models. Traditional offline business was the most affected by the epidemic, while online e-commerce and O2O experienced a rapid growth. Enterprises can take advantage of this "universal access" opportunity to start cross-border cooperation with online platforms, testing the water for innovative business models.

- Intelligent operations and smart decision making

With the goal of optimizing the cost structure, the best way to do so is by automating the processes and considering data-driven decisions. Tourism related businesses had to cut costs during the period of travel bans derived from Covid, so the need of optimizing cost structures arose. Achieving process automation and data-driven decision-making is a key factor in this, helping not only in optimizing but also helping organizations respond more flexibly to emergencies.

Considering these points, particular importance should be put on flexibility. During the Pandemic itself, it was crucial for companies to adapt and plan for unpredictability, and this translated in China with the shift towards local opportunities in inbound tourism. Taking advantage of the unwillingness to travel long distances because of safety reasons, companies have focused on alleviating safety concerns by adopting safety measures and targeting local tourists. "Having visible protection and sanitation measures helps to assuage hygiene concerns, while allowing for flexibility in travel packages and membership policies can help companies maintain and deepen customer relationships. As nationwide travel falls out of favor, local tourism would become the main driver of value. Local tourists tend to have more exacting expectations, so companies should look at offering high-value services and diversifying the range of experiences on offer. Travel players can combine niche activities, accommodations, and other value-added services to create "staycation" packages that appeal to local residents."<sup>53</sup> As the containment of the virus progresses, companies need to learn from all the measures taken during this period of time and continue to adapt them in the

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<sup>53</sup> CHEN Guang., ENGER Will, SAXON Steve, YU Jackey, *China's travel sector is undergoing a nonlinear recovery: What should companies do?*, McKinsey & Company – Travel, logistics and infrastructure insights, 2021. Source: <https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/chinas-travel-sector-is-undergoing-a-nonlinear-recovery-what-should-companies-do>

future, not only to improve the enterprise practices, but also to better cater to the new needs of tourists.

To summarize, while the tourism industry is seeing a return to some level of normalcy, there are still significant challenges that companies will face in 2023 and beyond. These challenges include labor shortages, financial anxiety among consumers, and growing concerns about climate change. As a result, companies will need to focus on product, performance, and price, while also considering the changing needs and characteristics of tourists. The restructuring of the industry presents opportunities for companies to consolidate and strategically expand, improve customer interaction, innovate and cooperate with online platforms, and optimize operations through data-driven decision-making and automation. Flexibility and adaptability will be key to success in the post-pandemic era, as companies continue to cater to the new needs of tourists and learn from the measures taken during the pandemic.

## 2.4 OBSERVATIONS ONE MONTH AFTER THE REOPENING ON JANUARY 2023

The most notable developments coming after China's borders reopening are all due to the gradual lifting of measures to reach the "Zero-Covid Policy", but the state of Chinese outbound tourism after the reopening on January 8, 2023, is still recovering. The number of Chinese tourists traveling abroad has been increasing since the reopening, but it is still far from pre-pandemic levels. The travel industry continues to face challenges, including travel restrictions and health concerns, which have made many Chinese tourists more cautious about traveling abroad. Additionally, the economic impact of the pandemic has also affected the purchasing power of many consumers, making it difficult for them to afford international travel. Despite these challenges, the travel industry is optimistic about the long-term prospects for Chinese outbound tourism and is taking steps to attract tourists and ensure their safety while traveling.

Immediately after the announcement that China would no longer subject inbound travelers to quarantine starting January 8, including residents returning from trips abroad, "searches for international flights and accommodations immediately hit a three-year high on Trip.com (TCOM). Bookings for overseas travel during the upcoming Lunar New Year holiday, which falls between January 21 and January 27 in 2023, have soared by 540% from a year ago, according to data from

the Chinese travel site.”<sup>54</sup> This positive trend is confirmed also by other online booking platforms, for example, according to Qyer data, following the announcement of the reopening of China, more than 90% of users have planned to start their travels abroad by 2023; of these, those who chose to travel within the first six months increased by 13.9% - reaching 38.5% - followed by those who want to travel within three months (23.1%). 12% of users took advantage of the Chinese New Year holidays to travel abroad.

As a Dragon Trail report<sup>55</sup> has analyzed, new rules have been introduced, such as no longer requiring PCR test results and health codes to be checked at cross-provincial borders or tourist attractions. The government has also launched an accelerated vaccine campaign, primarily targeting China's elderly population, with the aim of fully vaccinating 90.28% of the population by the end of the campaign. Regarding Inbound tourism, starting January 8, 2023, China no longer requires quarantine for international arrivals. Passengers must provide negative PCR test results from within 48 hours of departure and complete a health self-declaration. On the first day of the reopening, Visa services are also expected to return to normal but with no set date for tourist visas. China's visa-free transit policies for foreigners have also been re-implemented. For outbound travel, China has resumed normal passport processing for tourism and VFR travel and has allowed the sale of outbound group and package travel to 20 countries. The border between mainland China and Hong Kong has also reopened.

However, some countries, including Italy, have imposed restrictions on travelers from China, requiring negative COVID tests, conducting health screenings, and limiting the airports into which flights from mainland China can land. Despite these restrictions, international flights to and from China have more than doubled compared to the previous winter season, although they are still far behind pre-pandemic numbers. China lifted its circuit breaker policy, which suspended flights with positive cases on board, on November 11, 2022.

Despite the new rules and the gradual reopening with the relaxation of the pandemic restrictions, the situation for long-haul tourist destination is far from pre-pandemic levels. The number of difficulties for Chinese tourist to face are still too high, the main point being the difficulties to get a visa and the fact that Covid-19 is still active in China, with high infection rates. As an article from the

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<sup>54</sup> <https://edition.cnn.com/2023/01/06/economy/china-tourist-boom-post-covid-impact-intl-hnk/index.html>

<sup>55</sup> <https://dragontrail.com.cn/resources/blog/chinese-outbound-and-inbound-travel-rules-roundup>

New York Times states, “there has been a bump in tourism to nearby destinations, including Macau, Hong Kong, Thailand and Singapore, farther-flung destinations are still waiting. In addition to high levels of Covid cases within China, Chinese travelers face long delays in getting passports and visas, high prices for international flights and a lack of capacity, since many carriers cut flights during China’s long lockdown.”<sup>56</sup> These difficulties together with the entry requirements of a negative COVID test imposed by countries (Australia, Canada, France, India, Italy, Japan, Qatar, South Korea, Spain, UK, and USA)<sup>57</sup> all add up to create potential discouragement for Chinese tourists to travel, but considering that they are used to regular testing this won’t be considered a complete dealbreaker, but it is also true that no testing requirements will make a destination appear friendlier.

Overall, the gradual return of Chinese tourist is “boosting confidence in the economic recovery of countries that depend heavily on tourism.”<sup>58</sup> Players in the tourism industry are taking some steps towards small-scale diversified products to provide better experiences to the first wave of post-pandemic tourists from China, individual FIT travelers who won’t be stopped by the high cost of flights and increased fees. As for Italy, “according to the Italian National Bureau of Statistics, Italy received 5.356 million Chinese tourists in 2019 before the Pandemic, making it one of the most visited European countries in China that year. Valotti, Italy's chief representative in China, told reporters that Italy is well prepared to welcome more Chinese tourists to Italy as soon as possible.”<sup>59</sup>

In conclusion, the reopening of China's borders on January 8, 2023, has led to a positive trend in Chinese outbound tourism, with a significant increase in bookings for overseas travel. The gradual return of Chinese tourists is a sign of confidence in the economic recovery of countries in which the tourism industry is prominent, including Italy, and despite the ongoing challenges, the future of Chinese outbound tourism remains promising.

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<sup>56</sup> <https://www.nytimes.com/2023/01/29/travel/china-tourists.html>

<sup>57</sup> <https://dragontrail.com.cn/resources/blog/the-return-of-chinese-tourists-what-to-expect>

<sup>58</sup> <https://english.news.cn/20230207/43083feae264af8a6aff97dfb1829c1/c.html>

<sup>59</sup> CCTV Financial 央视财经, “意大利旅游业期待中国游客回归” *Italy's tourism industry looks forward to the return of Chinese tourists*, 2023.

### 3 FUTURE TRENDS OF CHINESE TOURISM IN ITALY

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After thoroughly analyzing the state of diplomatic relationships between Italy and China, and how the Covid-19 pandemic has impacted the global tourism market, the next step of this research will be to consider the new profile of the Chinese tourist in Italy and all the marketing strategies to adopt to better reach them. Considering the latest developments in Chinese tourism, including changes in traveler demographics, preferred travel styles, and the impact of technological advancements, it will be possible to look at the opportunities and challenges facing the Italian tourism industry as it seeks to attract and accommodate a growing number of Chinese visitors. By examining these trends and considering the broader context of Chinese tourism and economic growth, it will be possible to achieve a deeper understanding of the future of Chinese tourism in Italy.

This chapter includes the description and motivation to travel of Chinese tourists considering both the pre- and post-pandemic periods, attempting to define all the most important characteristics to take into account when dealing with them. Another main difference to consider when attempting to define tourist segments is the generation in which they were born (in this case, focusing on the characteristics of the younger generation of GenZ tourists), and to differentiate between the different reasons to travel, with an analysis of the possible segmentation in leisure tourism. This distinction and segmentation makes it possible to adapt the Italian tourist offer to Chinese customers in an effective way, being aware of the ever-changing environment that is the Chinese tourist market and keeping track of new trends to offer the best overall experience.

An important part of this research is also the role of digital platforms and digital marketing in tourist promotion in China. Being the country with the world's biggest internet user base and with the biggest number of active netizens in the world, it's clear how Internet and digital promotion play an important role in every sector, not just tourism. From the first steps of the customer journey, the information search, to the actual booking of the trip, online platforms are crucial for Chinese netizens, and understanding the digital environment that surrounds the tourism industry then becomes essential for any player in the market.



### 3.1 THE PROFILE OF THE OUTBOUND CHINESE TOURIST

Defining all the characteristics of Chinese tourists with the variance of its segmentation is almost impossible, due to the ever-changing nature of it and the tourism trends that influence different groups of tourists. But trying to determine the major tourist segments is vital for every player in the tourism market, as one common mistake that has proved costly for destinations and businesses is clinging to the outdated notion that Chinese tourists are all the same. Especially after the pandemic, the first wave of long-haul travelers in 2023 is characterized by experienced independent travelers, much different from the “mass-tourism” that still defines the stereotype of tourists from China, and it is including Millennials and Gen-Z travelers, more tech-savvy segments that have experience with social media and travel-planning websites and are less interested in big tours with limited time to explore their chosen destination. Of course, mass tourism won’t disappear completely, but those classic sightseeing tours with a big group will almost only appeal to Chinese travelers from smaller cities without travel experience.

Looking at the development of Chinese tourism, it is clear how it is tracing the evolution that has characterized all the mature tourist markets: the more Chinese people travel, the more they want to immerse themselves in the local culture, and to ensure this type of experience they rely mainly on experiences and advice from people they know by word of mouth, or of which they read online reviews. Today Chinese tourists are as different from each other as tourists from any other country, but with a special trait: they usually spend much more, making it one of the main sources of luxury travelers in the world. So, China is not only the largest tourist market, but it is also the one that shows the greatest ability to spending, and the fastest pace of changing and evolving. Considering data from the pre-pandemic years, the growth of the total number of Outbound trips from China had a steady increase, with the main drivers being the higher disposable income and the raise in overseas experience. Other external factors that determined this growth have been the easier access to online travel information and increase in air connectivity and accessibility.

To give a general profile of the Chinese Outbound Tourist, we can make a comparison between the general beliefs and the changing reality that actually represents them better. These changes, and the development of new preferences and needs, align with the development of the tourist market itself.

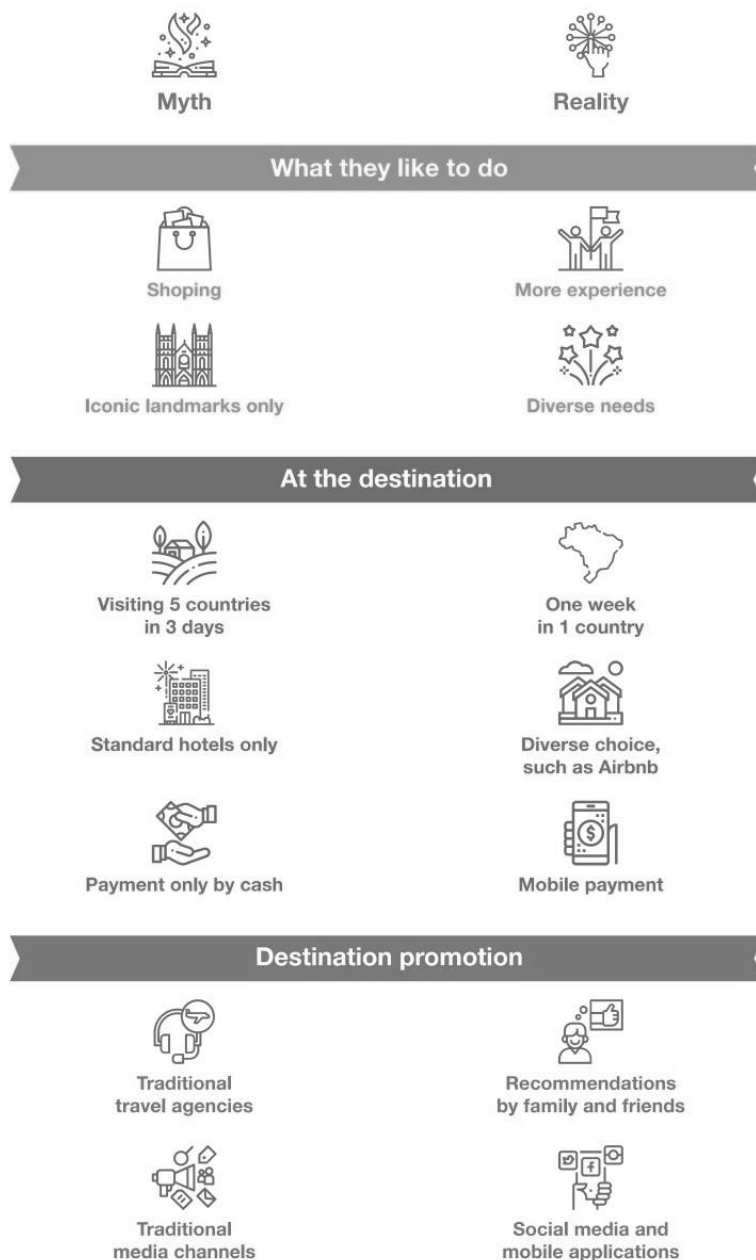


Figure 6 Myths of the Chinese outbound tourism market and new realities <sup>60</sup>

**More Experience:** Although luxury shopping is still a big attracting factor for some specific tourist segments from China, the myth that they travel only to partake in shopping needs to be dispelled.

<sup>60</sup> Image source: UNWTO World Tourism Organization, Guidelines for the Success in the Chinese Outbound Tourism Market, UNWTO Madrid, 2019.

Based on: DITCHER Alex, CHEN Guang, SAXON Steve, YU Jackey, SUO Peimin., *Chinese tourists: Dispelling the myths - An in-depth look at China's outbound tourist market*, McKinsey&Company, 2018.

The desire for natural scenery and sightseeing is one of the main drivers for travel, and the need for an overall “experience” of the country should be valued.

*Diverse travel needs:* As we said, there are several kinds of tourist segmentation to take into account when designing the tourist offer, so these different travelers will have different needs. These goes against the belief that Chinese tourists only want to visit iconic landmarks, instead, they prefer local culture and experiences, and depending on their segment, they may look for more relaxing or more adventurous travels.

*Longer stays and more flexibility:* with the natural development of the outbound tourist market, Chinese tourist more and more often opt for long-haul destinations (although short-haul destinations are still the most popular because of proximity, cost-effectiveness, and less language barriers). They are moving away from ADS tourism (group tourism), in search for more FIT packages (individual tourism), that can grant them more flexibility and the possibility to stay longer in their desired destination. They also not only rely on standard hotels, especially the younger generations, looking for a unique travel experience and booking the accommodation themselves through apps and websites.

*Mobile payments are a must:* China is the largest tourist market when considering it by visitor spending, and it is essential for a destination to utilize a form of payment that they are comfortable using. Credit cards have never been the most popular payment method in China, being completely overshadowed by Mobile payments. Alipay and WeChat Pay are the norm for younger generations, with the older ones still preferring cash.

*Word of mouth and Apps:* Travel agencies are being replaced by OTAs (Online travel agencies), websites which allow users to book all the travel services needed independently, and recommendations by friends and family, other than Online influencers, are now the main drivers and source of information.

To wrap up the general profile of the Chinese Outbound tourist, some basic information about the general age, gender, seasons, budget, are all crucial factors to understand and market long-haul Chinese tourists. Several tendencies that can be highlighted are that more than half of Chinese

travelers are from the Millennial and GenZ groups, 2 out of 3 are women, 90% are coming from large urban cities and have a good standard of education.<sup>61</sup>

Three major periods are welcoming the largest part of 145 million overseas trips of Chinese tourists: Chinese New Year, Summer Break and days preceding and following Chinese National Day. The tendency to travel with family or friends is also an important factor to consider. Package group tours still have success among Chinese travelers, who are likely to visit several cultural attractions in a row, especially for inexperienced tourists from smaller cities, families, and senior tourists.<sup>62</sup> While FIT travel is certainly on the rise with younger generations, ADS group travel shouldn't be ignored as it still covers a big percentage of outbound tourists.

### 3.1.1 Italy in the mind of Chinese tourists

For the matter of this research, we need to consider long-haul travel influxes from China, which is a smaller part of the total Outbound tourism. According to data from Eurostat<sup>63</sup>, in the last decade Italy has been one of the most popular countries for Chinese tourists coming to Europe, and the one in which they spent most nights during their visit, competing mainly with France, Spain and Germany. But why are they choosing Italy as their destination? This primarily depends on the type of tourist segment they are part of, but the main drivers of Italy as a country are the same and can be utilized as the basis for tourist marketing and promotional material<sup>64</sup>. The characteristics that attract Chinese tourists can be summarized into:

- *Made in Italy, with its concept of refinement, luxury, style, fashion and clothing, shopping, and famous brands.*

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<sup>61</sup> World Tourism Organization, Guidelines for the Success in the Chinese Outbound Tourism Market, UNWTO Madrid, 2019.

<sup>62</sup> EUSMECentre, "Chinese Outbound Travelers", 2019.

Source: <https://www.eusmecentre.org.cn/publications/chinese-outbound-travellers/>

<sup>63</sup> Nights spent at tourist accommodation establishments by country of origin of the tourist, source of data: Eurostat [https://ec.europa.eu/eurostat/databrowser/view/tour\\_occ\\_ninraw/default/bar?lang=en](https://ec.europa.eu/eurostat/databrowser/view/tour_occ_ninraw/default/bar?lang=en)

<sup>64</sup> See chapter 4.2 for an analysis of the main promotional initiatives that Italy has published for China, through the national tourism agency, ENIT. This material exemplifies how the Chinese idea of Italy is used to attract and how it is used at a state-scale level promotion.

- *Climate and scenic natural landscapes.*
- *The historical, artistic, and architectural heritage, the excellence of the UNESCO sites and the scenery of historical buildings.*
- *The perception of the “Italian way of life”, meaning family, the small villages and the local communities, the combination of modern and traditional, local cuisine and enogastronomy, the high quality of life.<sup>65</sup>*

These factors all positively contribute to the first step that travelers make on the tourist journey: the planning and information search before departure. The understanding of this step is key to having an insight on Chinese tourist motivation to travel and, consequently, how to adapt the tourist offer and marketing strategy to them.

The main purpose of travel for Chinese outbound tourists is leisure and sightseeing, and in the last few years, “more than half (56%) of Chinese tourists consider travelling abroad as no longer a critical consumption decision that needs long-time discussion and planning with family members.”<sup>66</sup> This is relevant as the first impact and the information about the destination that are available to tourists are now the main aspect to consider to influence the potential incoming tourists from China. “For most Chinese tourists, attractions are the most influential factor when choosing a destination (39%). Many tourists (16%) are also price sensitive. Delicious food (11%) and colorful activities (15%) can help to attract Chinese tourists. Transport and accommodation are essential elements of travel, but they have less influence on decision-making.”<sup>67</sup> This data resonates well with Italy and its tourist offering, consisting of an effective combination of culture and tourism, promising an experience and not only a destination.

There are also some factors that can discourage Chinese tourists to visit Italy, of course, and all the actors involved in the tourism market should take action into reassuring them and actually take into consideration their needs having a bigger cultural barrier to overcome than other long-haul outbound tourists from western countries. Based on a study by Gravili and Rosato titled “Italy’s Image as a Tourism Destination in the Chinese Leisure Traveler Market”<sup>68</sup>, they found the main

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<sup>65</sup> GAVINELLI Dino, *Obiettivo Italia: i turisti cinesi, nuovi utenti del patrimonio materiale e immateriale del Bel Paese*, in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, 2016, p. 99-108.

<sup>66</sup> World Tourism Organization, *Guidelines for the Success in the Chinese Outbound Tourism Market*, UNWTO Madrid, 2019.

<sup>67</sup> *Ibidem*

<sup>68</sup> GRAVILLI Silvia, ROSATO Pierfelice, *Italy’s Image as a Tourism Destination in the Chinese Leisure Traveler Market*, *International Journal of Marketing Studies*; Vol. 9, No.5; 2017.

drivers and repellents from a Chinese point of view, using a model that describes the functional and psychological attributes that act as encouraging and discouraging factors for a holiday in Italy. The elements they found are linked to different segments (for example, a tourist coming from a high-income defined segment will not be discouraged by the destination being perceived as “expensive”), but they give an overall result and a glimpse into the mind of a Chinese tourist visiting Italy.

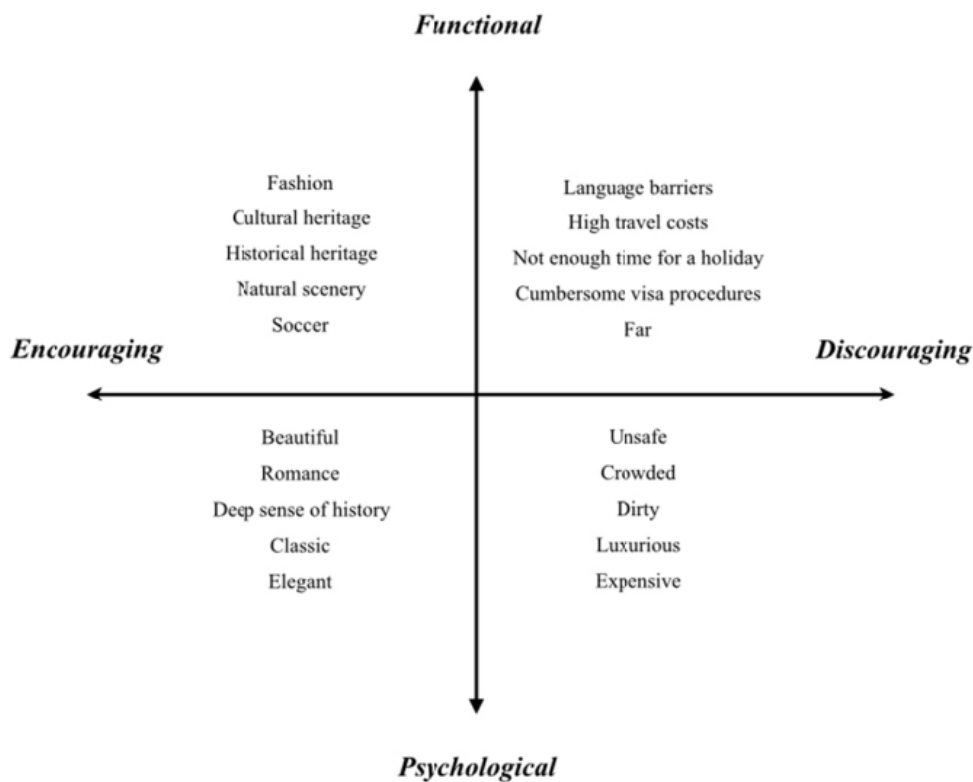


Figure 7: Functional and psychological attributes that act as encouraging and discouraging factors for a holiday in Italy<sup>69</sup>

The most common perception that Chinese tourists have of Italy, without particular attention to segments, is that Italy is the home of style, noticeable because of the references to fashion, fine living and high-quality handcraft when mentioning the country. Long-haul travelers are especially drawn to Italy’s artistic and historic heritage, and they are charmed by religious buildings as they associate them with well-known Italian figures such as Matteo Ricci. Architectural heritage is also well regarded, especially the cultural production of the Roman Empire and the Renaissance. The aspect that sets apart Italy from other European countries for Chinese tourists is the atmosphere,

<sup>69</sup> *Ibidem*

happy and easygoing, rich in evocations, especially in cities like Venice and Rome. Naples, Turin, and Verona are also appreciated, together with Lake Como, Sicily, and the recognized “capital of fashion”, Milan. Depending on what the tourist is looking for, be it luxury, gastronomy, well-being, they will be attracted to an Italian destination more than another, and despite the interest in cities (often associated with football clubs), nature tourism is on the rise.

Italy has a good reputation in China, and they expect an “experimental component” on their trip, looking for local experiences, enjoying culture and traditions. Aside from the stereotypes linked with fashion, romanticism and football, their image of Italy is becoming more detailed, with the concepts of elegance, sense of history and style becoming new inducements to travel to Italy. However, there are also some images that cast a bad light on Italy as a travel destination, like being unsafe, health concerns, litter and theft. These aspects add themselves to the other functional discouraging elements, especially Italy’s poor geographical accessibility and lack of information given by the language barrier, mainly the absence of Mandarin signs and menus, the higher cost of living in Italy and the difficulty of getting a visa.

To summarize, “the results of the qualitative and quantitative investigations demonstrated that overall, outbound Chinese tourists consider Italy to be a destination for holidays centered on relaxation, comfort, and art-and-culture. However, they also voice growing concerns about certain aspects of staying in the country, such as the chaos and poor organization or, with specific reference to tourism goods and services, a system that is poorly adapted to their needs and expectations. The risk is that of an increasingly sharp discrepancy between the secondary and primary images of Italy, due to a failure to fulfil the potential of its enormous historic, cultural, and natural heritage. In this sense, a consolidation of the national tourism sector’s system of governance and the application of policies designed to strengthen the destination’s resources may enable the creation of a series of highly flexible and personalized products and experiences, which would also have clear benefits in terms of the de-seasonalisation of flows.”<sup>70</sup>

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<sup>70</sup> *Ibidem*

### 3.1.2 Tourists' segmentation

After considering the general characteristics of the Chinese outbound tourist and their reasons for visiting Italy, the next step of this research is to get into detail of the differences that define the different tourists' segments in the leisure tourism market. These segments will have different behaviors, spending patterns and customer journeys.

There are countless studies and several ways to differentiate tourists and categorized them into segments based on different factors, so depending on the purpose of the developing of the segmentation the results can change, with a variable number of tourist categories. The segmentation taken into consideration for this research is based on a study by McKinsey<sup>71</sup> and it is elaborated with the definition of different "archetypes". The data used in this analysis is from the pre-pandemic period, but it is in line with the tourist characteristics of other more mature tourist markets. These archetypes are characterized by different behaviors, spending patterns and customer journeys:



#### **Value-seeking Sightseer**

- Families, low to middle income (monthly income of 12.000-25.000 yuan)
- They travel to escape from their routines and enjoy some time with their family members.
- Value-oriented, they most likely choose ADS group travel and prefer basic sightseeing with a laid-back schedule.
- More willing to spend on comfortable hotels and transportation, but otherwise not big shoppers. For the organization of the trip, they usually turn to travel agencies and tour operators.

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<sup>71</sup> DITCHER Alex, CHEN Guang, SAXON Steve, YU Jackey, SUO Peimin., *Chinese tourists: Dispelling the myths - An in-depth look at China's outbound tourist market*, McKinsey&Company, 2018.





### **Shopper**

- Married couples, aged 30–40.
- They look for a shopping-oriented travel experience, with less time devoted to basic sightseeing.
- They are highly influenced by social media and plans meticulously to seek the best-value deal.
- Other than shopping, they prefer to be conservative with their spending, preferring a package tour for its convenience and lack of complex planning.



### **Individualist**

- Aged 20–30, white collar with high income (monthly income of over 25,000 yuan)
- Strong self-awareness and desire a personalized and customized trip experience.
- Looking for unique destinations and personalized travel experience.
- Share their trip on social media, enjoying influencing friends.
- Seeks high-quality accommodations and food experiences.



### **Backpacker**

- Low- to middle-income workers aged 20–30.
- Enjoy outdoor activities and experiencing local culture, choosing less-known travel destinations to discover or experiencing less touristy areas.
- Price sensitive but willing to spend money on entertainment and local activities, with an income shift can develop into the Individualist archetype.



### **Novice Traveler**

- Middle income.
- Most likely to choose ADS group travel, influenced by peers.
- Prefers Chinese-speaking tour service due to high language barrier, favors going on package tours to avoid complex planning and prioritize visiting iconic landmarks.



### **Aspirant**

- Low income from Tier 1 or Tier 2 city.
- Looks for modern and metropolitan life, influenced by Kols and social media.
- Seeks high-status recognition from friends, buys from well-known brands.
- Appreciates quality and willing to exceed budget.



### **Sophisticated Traveler**

- Middle-aged, high income.
- Less price sensitive and emphasis on quality, looking for immersive experiences.
- Enjoys designing own unique travel experience with self-guided tours.
- Prefers to immerse in local culture, dedicates time to shop local products.



### **Unplugged**

- Single, middle income.
- Main need is to escape work routine and relax, may prefer package tour to avoid complex planning but prefers experiences away from high-volume tourist areas.
- Price sensitive.

These different archetypes account for the leisure travel market, but Outbound tourism also include Business tourism (MICE sector<sup>72</sup>), health tourism, educational tourism, religious tourism, wellness tourism, etc. The purpose of travelling can be a method of segmentation itself, as each kind of tourist look for different products and involves different players in the market, with the common denominator of the need for accommodation and transports. Another way of segmenting tourists, like customers in general, is by age and the generation which they are part of, which is useful for defining who will be more impacted by different travel trends.

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<sup>72</sup> MICE tourism stands for Meetings, Incentives, Conferences and Exhibitions, also known as “the meeting industry”, it is a common way to refer to the market closely tied with business tourism. This term encompasses all the tourists who travel for professional events such as conferences, seminars, trade shows and fairs, but also company retreats, summits, and corporate events.

### 3.1.3 Focus on gen-z tourists

Generation Z (born between 1995 and 2010) are the emerging demographic group, they are also referred to as the “Internet generation”, born with the digital revolution and mobile technologies. The growth environment of Generation Z coincides with a period of rapid economic expansion in China, with a significant increase in the level of consumption of Chinese citizens and better economic conditions. Their background make this generation more attentive to their needs in terms of self-image and personal enjoyment. At the same time, the growth stage of this generation occurs simultaneously with a decade of rapid Internet development in China, making them mobile digital and social media natives, characterized by global interconnections, technological developments, and consumption upgrades.

Defining their general tourist profile, Gen-Z tourists are known to be tech-savvy, independent, and experiential in their travel preferences. They seek unique and authentic experiences and are interested in local culture and traditions. Being part of the “Internet-generation”, they are also highly influenced by social media and peer recommendations when making travel decisions. “They are typically more specific about their travel goals and eager to meet individuals who share their interests. This opens space for companies to engage in the digital market and invest in social media apps that feature tools to connect with travel and tourism. Additionally, most young travelers are looking for a variety of unique experiences. Since social media content is how many choose their specific destinations or travel activities, Gen Z tourists in China are eager to replicate some of the experiences they encounter on these apps. Therefore, the way to win these consumers’ hearts, particularly in this demographic group, is to offer experiences (rather than products) – which may have more personal value.”<sup>73</sup> Compared to previous generations of Chinese tourists, an interesting aspect of the Generation-Z tourists is that they prioritize environmental sustainability and responsible tourism practices, and they are also more open to new destinations, beyond the traditional tourist hotspots. However, like all tourists, the travel habits and preferences of Gen-Z Chinese tourists can vary greatly and depend on individual factors such as personal interests, budget, and cultural background.

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<sup>73</sup> INTERESSE Giulia, *Tourism in China: 2022 Trends and Investment Opportunities*, China Briefing – Dezan Shira & Associates, 2022.

Source: <https://www.china-briefing.com/news/chinese-tourism-2022-trends-and-opportunities/>

This generation has already shown the impact of their consuming power on the Chinese travel market. According to Dragontrail data<sup>74</sup>, in 2019 Gen-Z tourists accounted for the 21% of total outbound tourists, and now with the older part of the generation being in their mid-20s, they represent an increasing market with distinct characteristics. During the pandemic, Chinese Gen-z tourists' contribution have been vital for the domestic tourism recovery, and now that borders have re-opened, we can expect the same travel sentiment being carried over to outbound tourism. When comparing this generation with the previous one, Millennials (born between 1980 and 1995), an important characteristic that positively influences the travel industry is their desire for experiences: "Gen Z are more intent on choosing experiences over products than all older generations and the swing between Millennials and Gen Z in China is second largest across all countries. Over 11% of Gen Z respondents strongly agree that they "would rather spend money on experiences than products" as compared to 6 – 7% in older generations."<sup>75</sup> This particular preference make Gen-Z consumers an important customer segment to consider when designing new travel products that are particularly catered to their needs and interests.

The report "Gen Z, Insight Report on Tourism Consumption Trends" by TravelDaily<sup>76</sup> provides some interesting statistics about their preferences. The first important thing to notice is how much they enjoy travelling as a generation:

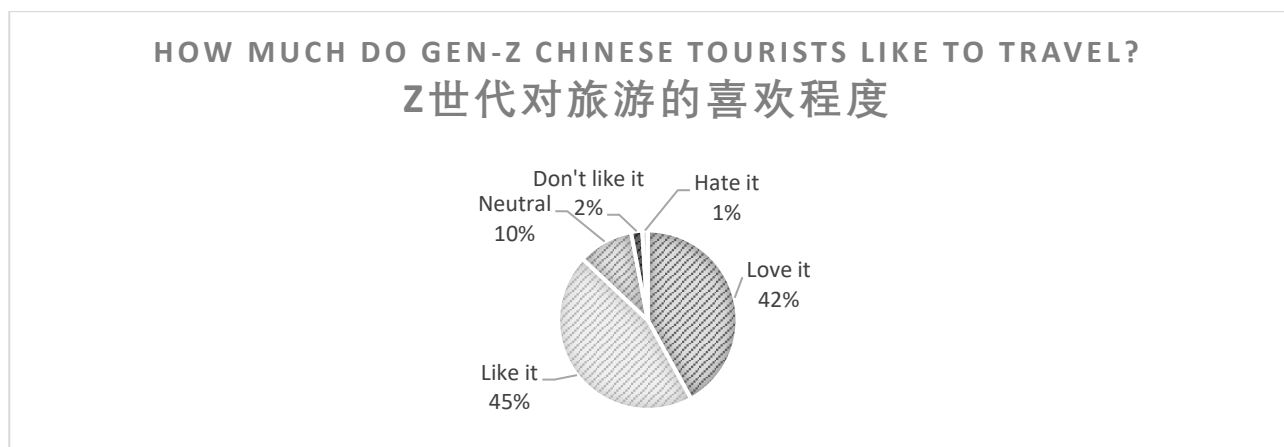


Figure 8 Source: Travel Daily 环球旅讯, 2020.

<sup>74</sup> PARULIS-COOK Sienna, *China's Gen- Z tourists: What you need to know*, Dragontrail Int., 2021

Source: <https://dragontrail.com.cn/resources/blog/china-generation-z-tourists>

<sup>75</sup> OC&C Strategy Consultants, *A generation without borders – Embracing generation Z*, OC&C in partnership with VIGA, 2018.

<sup>76</sup> TRAVEL DAILY 环球旅讯, 《Z世代, 旅游消费趋势洞察报告》"Z-shidài, lǚyóu xiāofèi qūshì dòngchá bàogào", "Gen Z, Insight Report on Tourism Consumption Trends", 2020

Source: <https://www.traveldaily.cn/article/139209>

Tourism and travel is also one of the main areas in which they wish to spend more money in after the Pandemic, making it the third pick after online shopping and education and training. Their reasons for travelling are linked to Gen-z desire for personal growth and enjoyment, but also to their interest in wellness and relax. The travel preferences of Chinese Gen-Z tourists set them apart from other generations, with their personal interests having a bigger impact compared to the others, and they reflect their unique values and interests: one example is sustainable and environmentally conscious travel, as the concern about the impact of travel on the environment of the younger generation increases, Gen-Z tourists are now looking for sustainable and environmentally responsible travel options. Another important characteristic which was already mentioned about these tourists is that they want unique and authentic experiences, that allow them to connect with local cultures and environments. In this sense, they also have particular interest in experiential travel, meaning immersive and interactive travel experiences, such as glamping, adventure sports, and cultural immersion programs.

As for their travel preferences, the data confirms the general trend in China to move away from group travel in favor of independent travel (FIT tours).

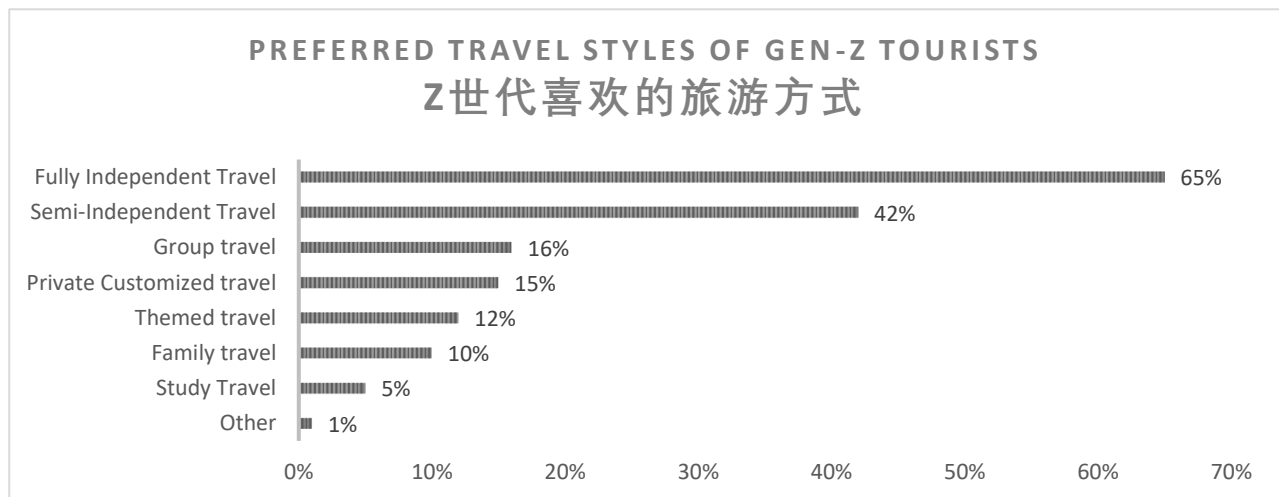


Figure 9 Source: Travel Daily 环球旅讯, 2020.

Another crucial point to note when dealing with Chinese Gen-Z tourists is that they are, as already mentioned, digital and social media-focused. Being highly engaged with digital and social media platforms, they use them as an important source of information and inspiration for travel. They also use social media to share their travel experiences with friends and followers.

Even OTAs and travel apps need to adapt to the new generation, as “generation Z regards travel apps as the main sources of tourist information and itineraries. There is a wide variety of such apps in China that are easy to access and uninstall. The Generation Z consumers spend an extremely short time to keep attention on the brands, even as short as eight seconds, which is 50% shorter than that found among the Millennials.”<sup>77</sup> Nonetheless, OTAs are still the first choice for this tourist segment to book their holidays, but more Gen-Z user friendly platforms, such as Douyin and Xiaohongshu, are also becoming more present in the tourism market not only as sources of travel inspiration and information, but also to directly make bookings.

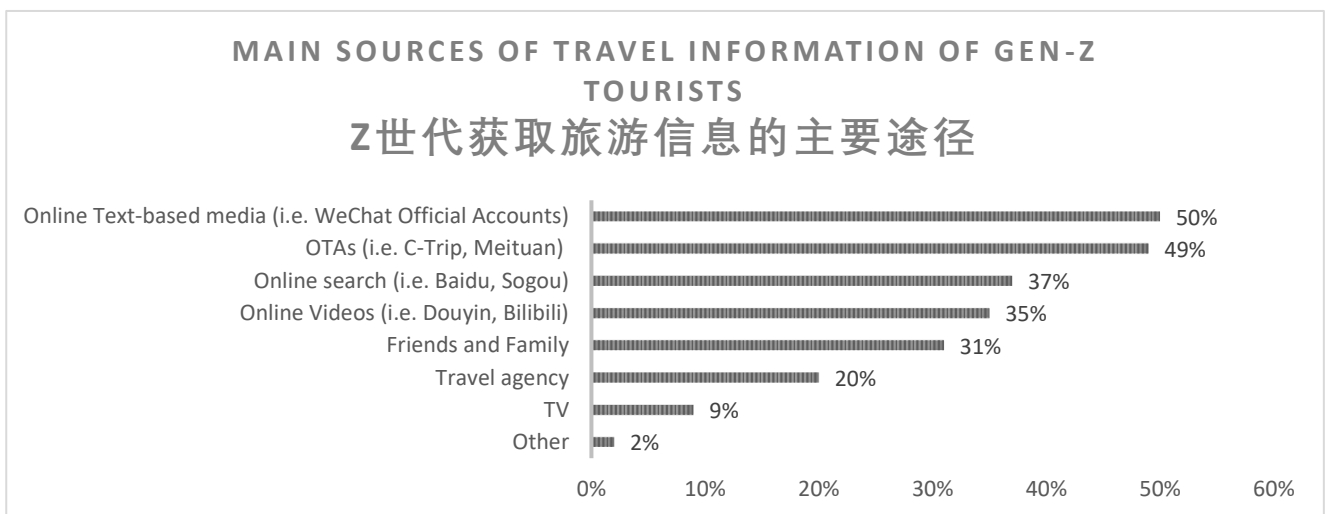


Figure 10 Source: Travel Daily 环球旅讯, 2020.

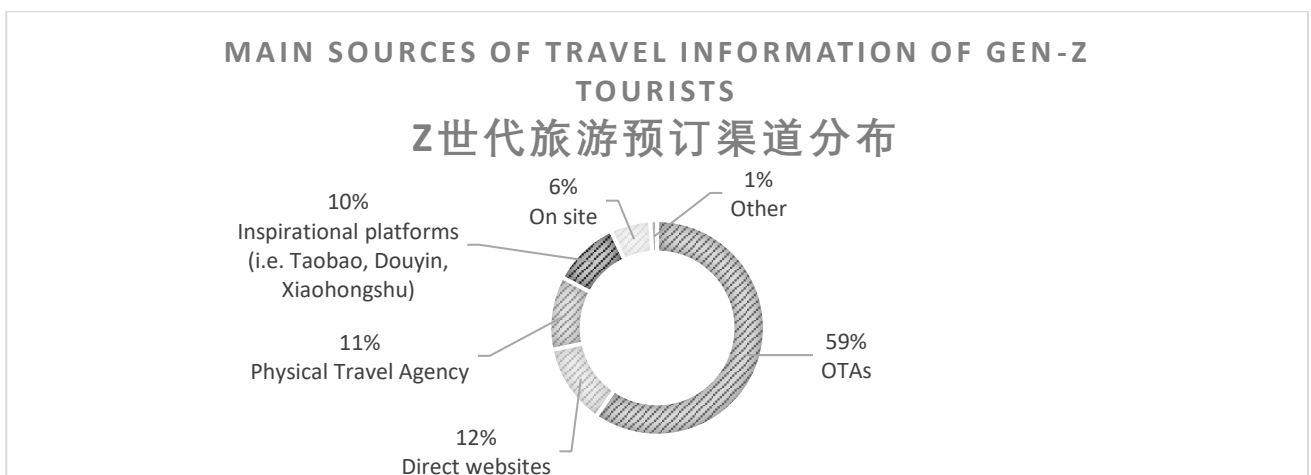


Figure 11 Source: Travel Daily 环球旅讯, 2020.

<sup>77</sup> TSENG Liyu., CHANG Junxiang. and ZHU Ying Ling, *What drives the travel switching behavior of Chinese Generation Z consumers*, Journal of Tourism Futures, 2021.

While the major travel trends that emerged after the pandemic will be discussed in chapter 3.1.4, it is important to mention the ones which are particularly popular with Chinese Gen-Z tourists: Sustainable travel, Glamping and *Daka* travelling (打卡).

This generation is particularly interested in *Sustainable travel* mainly because this travel trend aligns with Gen-Z values and provides opportunities for meaningful travel experiences that benefit both the environment and local communities. “The report, “A world in motion: shifting consumer travel trends in 2022 and beyond”, shows that sustainability is a key element of the travel agenda, with travelers eager to reduce their carbon footprint and support sustainable tourism. According to a survey included in the report, three quarters of travelers are considering travelling more sustainably in the future and nearly 60% have chosen more sustainable travel options in the last couple of years. Another survey also found that around three quarters of high-end travelers are willing to pay extra to make their trips more sustainable.”<sup>78</sup> Tourists from Generation Z are more environmentally conscious, and they are aware of the impact of travel on the environment. As a generation that is also highly informed and socially aware, Gen-Z Chinese tourists are interested in making informed choices and engaging in responsible consumption. They are seeking to support sustainable travel practices that benefit local communities, choosing sustainable tourism practices, such as eco-friendly hotels and activities, as they are also seen as beneficial for personal health and well-being.

The *Glamping* trend (or *luxury camping*) is a mix of Natural and Outdoor Travel, but without the need for disconnecting from social media. “The pandemic has pushed interest in outdoor activities and independent travel to new heights, and glamping and campervan travel has emerged as a major trend, made especially popular by KOLs. During the Labor Day holiday [...], searches for “camping” on Xiaohongshu – a platform dominated by post-90s women – were up by 230% compared to the year before. Outdoor adventure activities such as hiking, paragliding, and water sports are all currently trending.”<sup>79</sup> As this data suggests, this travel trend gained particular popularity through “Xiaohongshu” (also known as “Little Red Book”), a popular social media platform in China that has become a major influence in the country's travel and lifestyle trends. The platform's users, who are mostly young and highly influenced by social media, are drawn to the idea of glamping for its unique

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<sup>78</sup> TRIP.com, *WTTC and Trip.com Group global traveller report reveals shift towards sustainable travel*, 2023  
Available at: <https://www.trip.com/newsroom/trip-com-group-and-wttc-global-traveller-report-reveals-shift-towards-sustainable-travel/>

<sup>79</sup> PARULIS-COOK Sienna, *China's Gen- Z tourists: What you need to know*, Dragontrail Int., 2021  
Available at: <https://dragontrail.com.cn/resources/blog/china-generation-z-tourists>

blend of outdoor adventure and upscale amenities. The visually appealing nature of glamping and its potential for creating Instagram-worthy content has made it a popular subject on Xiaohongshu, helping to spread awareness and drive demand for this form of travel. As a result, glamping has become a popular travel trend in China, especially among Gen-Z tourists.<sup>80</sup>

"Daka Traveling" (打卡旅行) is a popular travel trend among Gen-Z Chinese tourists, and it translates as "punch card". It refers to traveling to specific destinations in order to take pictures or "check in" at popular tourist spots and post them on social media platforms such as WeChat and Weibo. The goal of "daka traveling" is to show off one's travels and experiences to friends and followers, as well as to accumulate cultural capital and improve one's social status. The trend is driven by the desire for unique and Instagram-worthy experiences, and the pursuit of personal fulfillment and self-expression through travel. "According to Mafengwo data, more than 87% of Chinese Gen-Z travelers have a daka list. Daka destinations can be famous places like Tian'anmen Square or the Eiffel Tower; they can be "internet famous" places like a pop-up shop or art installation, for example, or they can be trendy places that are tied to the traveler's personal interests, including theme parks, bookstores, or cafes. Daka can also add a ritual experience to travel – the kind of social media equivalent of collecting a Starbucks mug or a magnet from each city you visit."<sup>81</sup>

"Daka traveling" has become a major driving force behind the growth of Chinese outbound tourism, with many destinations and attractions catering to this trend by offering unique photo opportunities and experiences that can be shared on social media. "Daka" can be seen as a revival of traditional Chinese tourism that focuses on visiting famous landmarks and taking pictures. However, it has a distinct social media aspect, being designed for Instagram-style aesthetics, and tailored to personal interests, leading to varying daka lists among travelers.

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<sup>80</sup> See chapter 3.1.4 for a more in-depth analysis of Glamping

<sup>81</sup> PARULIS-COOK Sienna, *China's Gen- Z tourists: What you need to know*, Dragontrail Int., 2021  
Available at: <https://dragontrail.com.cn/resources/blog/china-generation-z-tourists>



### 3.1.4 New needs and travel trends in China after COVID-19

As it was previously mentioned in chapter 2 of this research, the COVID-19 pandemic has dramatically altered the way people travel, and Chinese tourists have not been immune to these changes. With travel restrictions now easing and the world beginning to reopen, it is important to understand the new tourism trends and the evolving needs that these tourists have when traveling, examining these changes, and exploring the emerging trends in Chinese outbound tourism in the post-pandemic period. It is also important to delve into the new needs and desires of Chinese tourists when traveling, including their concerns about health and safety, their budget-consciousness, and their desire for unique and authentic travel experiences. By understanding these trends and needs, the travel industry can better cater to the demands of Chinese tourists and prepare for the future of travel in a post-pandemic world. According to a study titled “Changes in travel behaviors and intentions during the COVID-19 pandemic and recovery period: A case study of China”<sup>82</sup>, COVID-19 has changed Chinese residents' travel preferences, with a trend towards shorter trips, more independent travel, a higher preference for private transportation, and a preference for natural, outdoor, and uncrowded attractions. Due to COVID-related fears, Chinese tourists prefer to plan their own routes instead of traveling in groups and prefer private transportation to public transportation, which impacted low-income travel. Lodging choices are also impacted, with a focus on sanitary measures. The number of local cases, COVID-19 prevention policies, and crowd level have been the key considerations in choosing a destination, with a preference for outdoor and uncrowded destinations for better air circulation and lower COVID risk. This study findings align with other studies that suggest nature-based recreation areas had increased popularity during the pandemic.

Based on the popular OTA Qyer Report, “Chinese Who Can Play: Insights into Chinese Travel in 2022”<sup>83</sup>, other than the direct changes due to the recent policy modification, the reasons to travel have also undergone some changes. The Top 5 outbound travel themes they identified see nature and sightseeing in first place, with rising interest in the discovery of different cultures and special interests. Chinese tourists are now seeking more unique and immersive travel experiences, seeking

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<sup>82</sup> FAN Xuecong, *Changes in travel behaviors and intentions during the COVID-19 pandemic and recovery period: A case study of China*, Journal of Outdoor Recreation and Tourism, 2022.

<sup>83</sup> QYER, *Chinese Who Can Play: Insights into Chinese Travel in 2022*, 2023.  
Available at: <https://travel.163.com/23/0116/15/HR7DNJQS00067VF1.html>

out destinations that offer a variety of activities and cultural experiences. The most popular destinations for outbound tourism are Thailand and Japan, as closer locations to China, but Italy fortunately occupies the 6<sup>th</sup> place in the top 10 destinations list, following Spain, France and the USA. Another trend to keep in mind is that with the increased use of technology, Chinese tourists are now more likely to book their travel online and explore destinations through virtual experiences such as online tours and virtual reality.

As the worries from the Pandemic start to fade away, Covid-related concerns are less impactful on the decision to travel of Chinese residents, but it is evident that the impact that it had contributed to the development of new tourism trends. This evolution of course is not only given by these years of travel restrictions and health concerns, but also from the changing of generations and the changing of the Chinese tourist market as a whole. The most notable changes are that there is a growing interest in nature-based and adventure tourism, as well as immersive, experiential travel experiences that allow Chinese tourists to connect with local culture and traditions. Additionally, the growth of the Chinese middle class has led to an increase in luxury tourism. Before the pandemic, some tourism trends in China were already growing and have been accelerated by it. A shift away from traditional, large group tourism towards private and personalized travel is the main trend observed. However, during the pandemic-induced closure, there have been further changes in tourist preferences, as seen through analysis of domestic tourism in China<sup>84</sup>.

#### *Experiential, Outdoor tourism and Glamping*

Chinese tourists are now seeking out more immersive experiences that allow them to connect with nature and local communities. This has led to a rise in popularity of eco-tourism and sustainable travel practices, especially within the younger generations. There has been an increased interest in nature-based travel, with many Chinese tourists seeking out destinations that offer scenic landscapes and opportunities for outdoor activities. With many popular destinations facing overcrowding, there has been an increased interest in lesser-known destinations that offer a unique and authentic travel experience. These current emerging travel trends in China reflect new lifestyle choices, new interests, new values and the need of new experiences.

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<sup>84</sup> CUCCOLI Francesca, *Turismo dalla Cina: i trend di viaggio outbound 2023*, ValueChina, 2023  
Available at: <https://valuechina.net/2023/01/24/turismo-dalla-cina-i-trend-di-viaggio-outbound-2023/>

This trend is reflected in the increasing popularity of adventure-based travel, such as hiking, camping, and cycling. Sports tourism in China is also growing as the pandemic has shifted Chinese focus towards outdoor activities and highlighted the importance of good health. An important travel trend that relates to this is *Glamping*, which was received particularly well by the younger generations of tourists, and camping in its more common idea of the term. "Nature and civilization seem to be a set of opposing concepts, being in the wild means "material detoxification," and all "man-made" goods have no place in the scene; staying away from the hustle and bustle means "tech detoxification," outliers and "disconnect." However, unlike the more radical attitude of the classic campers, the Glamping campers are eager to return to nature, but refuse to give up equipment, have desire to flee the city, but refuse to leave the crowd."<sup>85</sup> To provide a better idea of what the glamping experience means for Chinese tourists, a perfect example of it is the lifestyle brand "Dare Glamping", established in October 2020. "Rather than expecting guests to bring their own tents, Dare offers a "tent setting-up experience" where campers watch, film, and photograph while staff members show how it's done. With all-inclusive prices that rival luxury hotels in nearby cities, Dare also offers full-scale catering – including afternoon tea, furniture, lanterns, colorful blankets, showers, and toilet facilities. The brand has been featured in numerous Chinese television shows and is very much in line with the Xiaohongshu camping aesthetic – in fact, the social media platform is seen as an essential factor behind Dare's success."<sup>86</sup> This translates to a perfect mix of nature and luxury, trends that are both really appreciated by post-pandemic Chinese tourists (especially within the younger generations).

### *Family travel*

"According to Qyer.com, the parent-child trip has entered for the first time in the TOP5 of the most popular travel types, become the choice of numerous families with children: tours in natural landscapes, historical and cultural experiences and experiences in theme parks are among the most successful types. According to the report on parent-child travel published by Ctrip, bookings of

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<sup>85</sup> YUANQI CAPITAL 元气资本, 《露营的时代分层: 经济上升期热衷精致露营, 萧条期迷恋「荒野求生」》, "The era stratification of camping: Glamping in periods of economic recovery, "Survival in the wild" during the recession", 2022.

Available at: <https://www.cyzone.cn/article/685485.html>

<sup>86</sup> PARULIS-COOK Sienna, *China's Travel Trend of the Year: Glamping*, Dragontrail Int., 2022

Available at: <https://dragontrail.com.cn/resources/blog/chinas-travel-trend-of-the-year-2021-glamping>

parent-child tourist products for summer 2022 in China accounted for 30% of bookings on all types of tourist products.”<sup>87</sup>

Family travel has become a popular trend post-pandemic for a few reasons. Firstly, the pandemic has caused people to re-evaluate their priorities, and many have chosen to prioritize spending time with their loved ones. Secondly, the pandemic has made people more cautious about traveling and many prefer to travel with family for safety reasons. Finally, the closure of international borders has made domestic travel more appealing, and family travel is often more feasible within the country, a trend that will likely spill over even to the outbound destinations. As an Airbnb report<sup>88</sup> found out, "meaningful travel" has become the new norm in the post-epidemic era and “being together” is now one of the core appeals to enjoy a holiday, sharing it with the people you love. They found that compared to pre-pandemic data, there has been a 62% increase of tourists who want to spend better time with family and friends by traveling together.

### 3.2 THE KEY ROLE OF DIGITAL PLATFORMS AND WEB MARKETING STRATEGIES

As the Chinese internet environment is developing and evolving, and with China being one of the countries with the largest internet user base, every industry is undoubtedly involved in it in one way or another. Digital platforms play a significant role in the Chinese tourism industry, as they help connect tourists with travel service providers and enable them to research and book their travel experiences online. “It is important to use digital technology to promote the integration of culture and tourism. For example, the integration of culture and tourism is conducive to releasing a new momentum for economic development, which can further compensate for the lackluster growth potential of both. [...] With the help of digital technology, the cultural industry can give the tourism industry a new soul. Therefore, the tourism industry can package the original tourism scene and environment with cultural content that is more in line with the characteristics of the times. The

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<sup>87</sup> CUCCOLI Francesca, *Turismo dalla Cina: i trend di viaggio outbound 2023*, ValueChina, 2023

Available at: <https://valuechina.net/2023/01/24/turismo-dalla-cina-i-trend-di-viaggio-outbound-2023/>

<sup>88</sup> AIRBNB 爱彼迎, 《2022 年旅行趋势报告》“2022 nián lǚxíng qūshì bàogào”, 2022 Travel Trends Report, 2022

tourism industry can also find a new material carrier for culture, which is convenient for broadening cultural content dissemination.”<sup>89</sup> The integration of digital technology into the cultural industry can provide new and innovative ways for tourists to experience and connect with the culture of a destination, allowing for the creation of immersive experiences that bring tourists closer to them. For example, virtual reality and augmented reality experiences can give tourists a more in-depth look at the history, art, and architecture of a particular location. This technology also provides a platform for cultural organizations and travel companies to tell the stories of their destinations in new and engaging ways, and through virtual tours making cultural experiences more accessible to a wider range of tourists, regardless of their location or physical abilities.

As a study by Zhao and Liu<sup>90</sup> has found, the combination of modern science and technology in tourism expands the market size and development opportunities of the tourism industry. It also enhances the tourists' experience and the flexibility of the tourism supply to meet demand, driving the transformation and innovation of the industry. This has led to growth in China's online travel market, with travel agencies and tourist spots using the internet and AI to improve their products and services. The internet and big data have also allowed online travel agencies to develop unique business models. According to a CNNIC report<sup>91</sup>, the digitalization and the technological innovation allow for the creation of a “new ecology of smart tourism”. The combination of “tourism + technology” continues to drive a new era of smart tourism, where companies such as Ctrip use big data, AI, AR, and other technologies to enhance immersive, experiential, and interactive travel experiences, leading to the transformation and improvement of the tourism industry.

Enterprises are also prioritizing the digital transformation of their operations, aiming to increase efficiency and better cater to the diverse and personalized needs of travelers. Additionally, “tourism + live streaming” is becoming increasingly popular, as seen by a 230% increase in travel live-streaming views on Weibo from January to May 2022 compared to the same period the previous year.

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<sup>89</sup> ZHAO Xue, XIE Chengyuan et al., *How digitalization promotes the sustainable integration of culture and tourism for economic recovery*, “Economic Analysis and Policy”, Volume 77, 2023

<sup>90</sup> ZHAO Yanyun, LIU Bingqie, *The evolution and new trends of China's tourism industry*, “AIMS – National accounting review”, 2020.

<sup>91</sup> CNNIC China Internet Network Information Center, *The 50th Statistical Report on China's Internet Development*, 2022.

This makes it vital for tourism companies to develop efficient web marketing strategies and utilize all the tools that are essential in the Chinese digital environment. As a McKinsey report states<sup>92</sup>, travel companies should focus on digitalization: they can enhance their digital capabilities in order to reach customers more effectively and to offer improved travel experiences. The majority of travelers view travel as a personal experience, and digitalization presents the opportunity to enhance the customer experience on a personalized level on a large scale. Travel companies can foster a more intimate sense of community by guiding customers from large online platforms to smaller, more exclusive online domains. Platforms such as WeChat in China act as digital "public" ecosystems with a large user base from various backgrounds. By creating a more "private" space, such as a "miniprogram" on WeChat, travel companies can better reach their target customers, making their marketing efforts more efficient. Furthermore, travel companies can take advantage of viral moments and make use of real-time marketing to become travel ambassadors and reach a larger audience. In terms of operations, artificial intelligence and advanced data analytics are transforming the way travel companies do business, just as they are doing in many other industries. Both traditional tourism players (airlines, hotels, attractions) and online travel agencies (OTAs) can redefine their services offerings.

As the majority of internet access is via mobile, the role of apps and mobile users-friendly websites is also a priority to take into account to cater to the Chinese tourist market. According to the 2022 CNNIC statistical report on China's internet development<sup>93</sup>, the 99.6% of Chinese netizens accessed the internet through mobile phones, compared to the 33.3% using a PC. And while the number of users of online-booking slowed down (following the pace of recovery of the travel market as a whole), they found that "enterprises accelerated the digital transformation of the upstream and downstream links of the tourism industry chain, striving to improve the efficiency of the entire industry chain and better meet people's multi-level, diversified and personalized travel consumption needs."<sup>94</sup>

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<sup>92</sup> CHEN Guang, ENGER Will, SAXON Steve, YU Jackey, China's travel sector is undergoing a nonlinear recovery: What should companies do?, McKinsey & Company – Travel, logistics and infrastructure insights, 2021.

Available at: <https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/chinas-travel-sector-is-undergoing-a-nonlinear-recovery-what-should-companies-do>

<sup>93</sup> CNNIC China Internet Network Information Center, *The 50th Statistical Report on China's Internet Development*, 2022.

<sup>94</sup> *Ibidem*

### 3.2.1 OTAs

According to recent data, a significant proportion of Chinese travelers have adopted online travel agencies (OTAs) as their preferred method for booking travel arrangements, especially within the Millennial and Gen-z generations. The trend towards online booking is driven by the convenience, wide range of options, and competitive pricing offered by OTAs. Additionally, the increasing use of mobile devices in China has made it easier for travelers to access and book through these platforms. It should be noted that the exact percentage of Chinese travelers using OTAs versus physical travel agencies can vary depending on the source and the specific travel arrangements being considered (e.g. flights, hotels, activities, etc.). However, overall, the trend is clear: an increasing number of Chinese travelers are turning to OTAs for their travel booking needs.

When considering FIT's bookings, (individual travel), we can take into account the percentage of utilization of flight tickets booking tools and hotel booking tools.

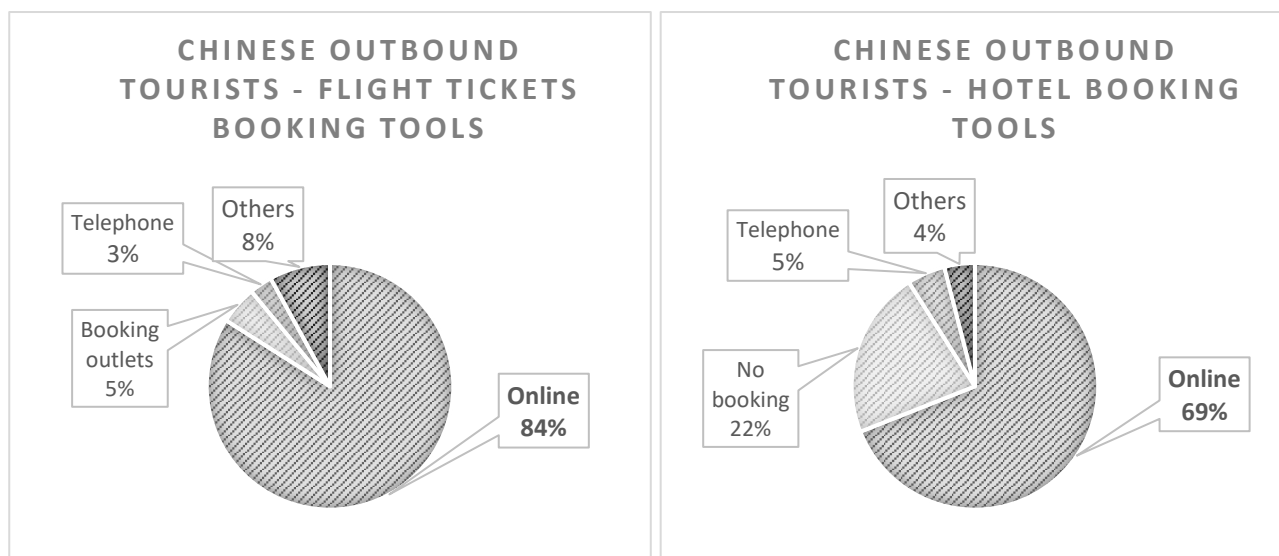


Figure 12 Booking tools percentage of use<sup>95</sup>

Other than for booking, OTAs are also used to gather information about a travel destination, as they have become comprehensive platforms where users can plan, book, and share their travel experience. OTAs offer a convenient and user-friendly platform for Chinese travelers to book their travel arrangements, including flights, hotels, and activities. This allows them to easily compare prices and offerings from different providers, and book their travel arrangements in one place.

<sup>95</sup> Image source: World Tourism Organization, *Guidelines for the Success in the Chinese Outbound Tourism Market*, UNWTO, Madrid, 2019.

These platforms offer a wide range of travel options, allowing Chinese travelers to easily find the destination, accommodation, and activities that suit their needs and budget, and offer competitive pricing, as they have access to a large pool of suppliers and can negotiate better rates for their customers. The major OTAs also use data and machine learning algorithms to make personalized recommendations to Chinese travelers, based on their preferences and past behavior.

They are useful to companies because they provide a platform for travel providers to reach a large audience and market their offerings effectively. Partnering with OTAs for advertising, banners or to be featured in specific landing pages for niche sections or specific travel products is an effective way to enter the digital travel market in China.<sup>96</sup>

As OTAs have established themselves as trusted and reliable sources for travel booking in China, offering a wide range of options, competitive prices, and convenient payment methods, it is essential to know the most popular ones.

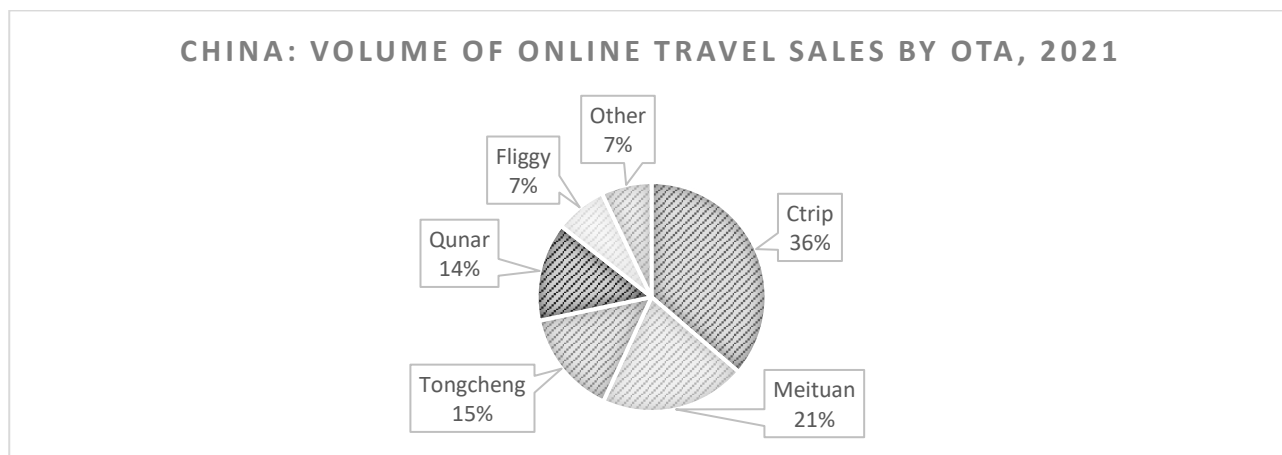


Figure 13 Source: "Fastdata 2021 online travel industry report"<sup>97</sup>

### Ctrip (携程 Xiecheng)

Ctrip is a comprehensive platform that serves as a travel companion for tourists from start to finish. It offers inspiration through content and reviews, as well as booking options for travel destinations, sightseeing, and shopping. The app, as the Trip.com Group<sup>98</sup> defines it, acts as a one-stop-shop for

<sup>96</sup> GRAFF Roy, PARULIS-COOK Sienna, *China, the future of travel*, Dragon Trail Int., 2019.

<sup>97</sup> Fastdata 极数, 《2021 年中国在线旅游行业报告》, "2021nián zhōngguó zàixiàn lǚyóu hángyè bàogào", "2021 China Online Travel Industry report", 2022.

<sup>98</sup> Available at: <https://investors.trip.com/about-the-company/corporate-profile/>



all travel industry products and services, and goes beyond just being a marketplace - it's also a content platform that features both user-generated and professional content, and can be used for promotion and marketing purposes.

Ctrip offers solutions to enhance brand recognition and create targeted marketing campaigns aimed at specific audiences. A key aspect of this is the landing page, which serves as the destination's showcase and displays all published content and information about the place and products being promoted. The landing page is supported by banner advertising campaigns, enabling you to strategically sponsor the landing page on different pages of the platform.

Trip.com Group recently launched a satellite platform, Star Hub Channel. As *ValueChina*<sup>99</sup> analyzed it, Star Hub acts as a social media account for travel destinations. Here, they can post promotional content, vouchers, live streams, and sponsored products, and then these posts are aggregated in the account news feed and integrated with user posts related to the destination. As a social platform, professionally made content is crucial for presenting information about the destination and inspiring Chinese tourists to visit, and these posts should be valuable and engaging to attract visitors to the sponsored site.

### *Qunar (去哪儿网 Qunaer wang)*

A popular OTA in China that provides travel services, including flight tickets, hotel bookings, and vacation packages. As their company description states, "Qunar's mission is to create and maintain a fun and hassle-free one-stop travel information source for Chinese travelers. Via its website and mobile applications, the company organizes enormous travel information and provides instant and thorough searches of flights, hotels, travel packages, group-buying deals and other travel-related information to travelers, helping them find travel products of great value, and travel information that best matches their needs, all by its intelligent and avant-garde technology."<sup>100</sup> Platform born as a meta-search engine, it evolved into a full-fledged OTA that competed directly with Ctrip. But now, Ctrip acquired 45% of the company, and the two OTAs have redefined their focuses<sup>101</sup>: Ctrip

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<sup>99</sup> Available at: <https://valuechina.net/2021/07/01/turisti-cinesi-in-italia-come-attrarli-con-ctrip/>

<sup>100</sup> Available at: [https://www.qunar.com/site/en/Qunar.in.China\\_1.1.shtml](https://www.qunar.com/site/en/Qunar.in.China_1.1.shtml)

<sup>101</sup> GRAFF Roy, PARULIS-COOK Sienna, *China, the future of travel*, Dragon Trail Int., 2019

now concentrates on high-end and international travel, while Qunar specializes in domestic and group travel - to complement each other.

### *Tongcheng-Elong (桐城-埃隆 Tongcheng-ailong)*

Tongcheng-Elong is a leading online travel company in China offering a wide range of travel services including flight and hotel bookings, packaged tours, and transportation rentals. The company leverages its platform to provide seamless integration and marketing support for its partners in the travel industry, helping them reach a larger customer base. With a focus on user experience, Tongcheng-Elong strives to make travel planning and booking as convenient and efficient as possible. As their corporate profile states: "Tongcheng Travel is an innovator and market leader in China's online travel industry. Tongcheng Travel is the combined business resulting from the merger of Tongcheng and eLong, the leading OTAs in China, in 2018. Tongcheng Travel is a one-stop shop for users' travel needs. With the mission of "make travel easier and more joyful", Tongcheng Travel offers a comprehensive and innovative selection of products and services covering nearly all aspects of travel, including transportation ticketing, accommodation reservation, tourist attraction ticketing, and various ancillary value-added travel products and services designed to meet users' evolving travel needs throughout their trips primarily through our online platforms, which comprise our Tencent-based platforms, our own mobile apps, quick apps and other channels."<sup>102</sup> Being part of Tencent, a digital giant that owns WeChat, the focus on the app and user experience are key factors for its popularity.

### *Fliggy (飞猪 Feizhu)*

Fliggy (previously known as Alibaba Travel) is an OTA operated by Alibaba Group and it offers flight tickets, hotel bookings, and packaged tours. The Fliggy brand was launched in 2016 following a rebranding from "Alitrip." As their official profile on Alibaba states<sup>103</sup>, Fliggy is a top online travel platform in China that offers complete reservation services for flights, trains, accommodations, car rentals, tours, and local attractions. It uses its platform to support industry partners such as hotels, by connecting their services and membership systems and using digital marketing to offer a wider

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<sup>102</sup> Available at: <https://www.tongchengir.com/en/about-tongcheng-travel/corporate-profile/>

<sup>103</sup> Available at: <https://www.alibabagroup.com/en-US/about-alibaba-businesses-1496655726993473536#:~:text=The%20Fliggy%20brand%20was%20launched,package%20tours%20and%20local%20attractions.>

range of travel options to users. Fliggy also hosts travel-specific shop fronts<sup>104</sup>, with companies such as American Airlines, Marriott, Hilton, and benefits from the netizens already utilizing Alibaba and Alipay.

### *Meituan-Dianping (美团-大众点评 Meituan – Dazhong Dianping)*

Meituan-Dianping is a comprehensive platform that provides services including food delivery, hotel bookings, and ticketing for attractions, as well as travel services. “Meituan is a one-stop platform for food, transportation, travel, shopping and entertainment. The value we create serves not only to help everyone eat better, but also to improve their lifestyles, helping them to live and travel better.”<sup>105</sup> The platform expanded its services from food delivery to booking services, becoming one of the first Ctrip competitors, especially in the domestic market. According to China Travel News<sup>106</sup>, “Tapping into the consumption trends and increasing its presence in the lower-tier cities proved to be a constructive development from Meituan’s travel business perspective”, and during the pandemic it was the first OTA to recover, focusing on the low-star segment of hotels.

Other important platforms in the digital tourism market in China are Mafengwo and Qyer, two popular travel review and recommendation platforms in China, that also provide some OTA services.

Mafengwo<sup>107</sup> (蚂蜂窝 Mafengwo) is a travel website that provides a platform for travelers to share their travel experiences and recommendations, including reviews and ratings of destinations, hotels, restaurants, and tourist attractions. It also offers a range of travel-related services, focusing on "content + transactions", and catering to younger generations. Qyer<sup>108</sup> (穷游网 Qiongyouwang) is another popular travel review and recommendation platform in China, providing a platform for travelers to research and write about their travel experiences, including destination reviews, hotel and restaurant recommendations, and travel tips. It also offers a range of travel services including flight and hotel bookings and packaged tours. Both platforms have a strong focus on user-generated content, allowing travelers to share their experiences and help other travelers plan their trips. They

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<sup>104</sup> Graff R., Parulis-Cook S., “China, the future of travel”, Dragon Trail Int., 2019

<sup>105</sup> <https://about.meituan.com/en/details>

<sup>106</sup> <https://www.chinatravelnews.com/article/160784>

<sup>107</sup> <https://www.mafengwo.cn/s/about.html>

<sup>108</sup> <https://nav.qyer.com/about>

are well-established players in the Chinese travel market and are popular choices for those looking to research and plan their travel arrangements.

To succeed in the Chinese market, it is important to understand working with dominant Chinese digital travel brands and OTAs, such as Ctrip. Ctrip offers many advertising opportunities, including the possibility for cross platform advertising (which will be explored in the following chapter), the inclusion of coupons in confirmation emails, and a system to label "Chinese preferred hotels" on overseas listings (label that is given to accommodation facilities or services which cater specifically to Chinese tourists), which can be filtered by users when searching for hotels. OTAs are also strengthening their brand image by offering comprehensive tours and high-quality travel experiences, including lodging, dining, and shopping experiences. They have also begun collaborating with tourist destinations, investing in and participating in their planning, design, and operations, thereby gaining significant influence. As Parulis-Cook of Dragontrail Int. suggests<sup>109</sup>, to succeed in the digital travel market, companies can partner with websites for advertising and feature placement, such as on destination pages or product-specific sections. They can also participate in content partnerships, like Fliggy's partnerships with airlines, hotels, and other travel brands that promote travel tips from official sources.

As for travel review websites, reading reviews of your destination to understand its popularity and developing your Chinese marketing strategy is a useful way to utilize the resources available in these sites. Travel review websites like Qyer can also be used for soft advertising by hiring key opinion leaders (KOLs, influencers) to write about destinations or go on sponsored trips. The review sites offer traditional online advertising and distribution, allowing users to buy products with a portion of the price given back as commission to the website. Review websites also host live-streamed offline events and have established large communities, making them an effective way to raise awareness and promote travel destinations or products.

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<sup>109</sup> PARULIS-COOK Sienna, *China's Online Travel Market: What You Need to Know to Get Involved*, Dragontrail Int., 2017.

Available at: <https://dragontrail.com.cn/resources/blog/chinas-online-travel-market-what-you-need-to-know-to-get-involved>

### 3.2.2 Cross-platform advertising and livestreaming

The Chinese digital environment is evolving, and so are the Chinese netizens. Even if the above mentioned OTAs all try to act as a “one-stop-shop” platform, the truth is that consumers utilize different platforms comprehensively. For companies, this means that they need to combine different digital marketing actions and a more diversified approach to reach travelers. This is evident as techniques such as cross-platform advertising, KOL (Key opinion leader) marketing and livestreaming are all combined to create promotional strategies mixed with social media functionalities.

*Cross-platform advertising* has had a significant impact on the travel industry in China. With the widespread use of mobile devices and the increasing popularity of social media and e-commerce platforms, cross-platform advertising has become a valuable tool for reaching and engaging with potential customers. While advertising and deals with OTAs still remain the most popular ways to promote a destination or an accommodation facility, the role of social networks in the Chinese digital environment should be taken into consideration due to the sheer volume of users and considering the role of user generated content in travelling decisions. “Online travelers can be active in multiple social networks, and they can access and exchange information through multiple physical and social networks that intersect. Therefore, information is now distributed across multiple coupled networks rather than a single-platform network. The information dissemination of the coupled network has become more complex as the functions of social platforms have been upgraded and the range of travel users has expanded.”<sup>110</sup> Using Weibo, WeChat, Douyin<sup>111</sup>, all the most popular social media platforms becomes essential to diversify and disseminate the advertising content.

Cross-platform advertising allows travel companies to reach a wider audience and target specific tourist segments. By utilizing a variety of platforms and advertising formats, travel companies can provide a more engaging and interactive customer experience, increasing brand awareness and building customer loyalty. It also allows travel companies to leverage data and technology to deliver highly personalized and targeted advertising to potential customers. For instance, Ctrip is a blatant

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<sup>110</sup> CHEN Jia, WANG Haomin and CHAO Xiangrui, *Crossplatform opinion dynamics in competitive travel advertising: A coupled networks' insight*. Front. Psychol., vol. 13, 2022.

<sup>111</sup> See Annex 1 for the list and short description of alle the most used social media platforms in China.

example of this technique, integrating precision marketing not only on the platform itself, but also on external platforms such as WeChat, Xiaohongshu and Douyin<sup>112</sup>. By providing a seamless and integrated customer experience across multiple platforms, it can help travel companies convert more potential customers into actual bookings, and especially when combined with KOL marketing in open social media<sup>113</sup>. By partnering with KOLs, travel companies and destinations can reach a large audience and increase awareness about their offerings. As a study about destination endorsers raising on short-form travel videos have shown, celebrities have the power to attract public attention to destinations due to their popularity and influence, which strengthens the emotional bond between potential tourists and the destination.<sup>114</sup>

Livestreaming is also linked to the "Cloud tourism" phenomenon, a new trend in China that emerged during the COVID pandemic as people couldn't travel due to travel bans and restrictions. Thanks to livestreaming, people could virtually visit tourist attractions and appreciate the scenery without going outdoors<sup>115</sup>. With the widespread use of mobile devices, livestreaming provides a convenient and accessible platform for people to access and consume content. "Live streaming naturally displays the dual properties of social commerce and media, which integrate real-time social interaction into e-commerce. Thus, it has grown into an important market segment that enables potential tourists to make more informed travel decisions in real time, thereby reducing their risks and fears about the intangibility and asymmetry of tourism products and services. Travel retailers on live-streaming platforms promote local folk customs and cultures, intuitively display natural resources, and provide discounts to attract viewers and generate economic value."<sup>116</sup> These are the main advantages of livestreaming in tourism, allowing for real-time interaction between hosts and viewers, answering questions and providing information, allowing travel companies to showcase destinations, products, and services in real-time, providing a more immersive and interactive experience for potential customers. Livestreaming has also been integrated with e-commerce platforms, allowing users to purchase products directly through the livestream. This has been

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<sup>112</sup> <https://valuechina.net/2021/07/01/turisti-cinesi-in-italia-come-attrarli-con-ctrip/>

<sup>113</sup> CHEN Jia, WANG Haomin and CHAO Xiangrui, *Crossplatform opinion dynamics in competitive travel advertising: A coupled networks' insight*. *Front. Psychol.*, vol.13, 2022.

<sup>114</sup> YANG Jingjing, ZHANG Difei et al., *Destination endorsers raising on short-form travel videos: Self-image construction and endorsement effect measurement*, *Journal of Hospitality and Tourism Management*, Volume 52, Pg. 101-112, 2022.

<sup>115</sup> <https://www.globaltimes.cn/page/202205/1266166.shtml>

<sup>116</sup> YANG Jingjing, ZENG Ying., et al., *Nudging interactive cocreation behaviors in live-streaming travel commerce: The visualization of real-time danmaku*, *Journal of Hospitality and Tourism Management*, Volume 52, pg 184-197, 2022.

particularly popular in the fashion and beauty industries but is also becoming increasingly popular in the travel industry.

Livestreaming has had a significant impact on the travel industry in China. This new marketing trend has become a popular tool for travel companies to reach and engage with customers in real-time, and the *danmaku* function (bullet point messages on screen), as the primary communication channel during the live stream between the viewers and the streaming host, has shown to be a key element that tourism websites should exploit. “Famous travel bloggers, Ctrip contract travellers, microblog/vlog bloggers and microblog travel video personnel have all engaged relevant live-streaming platforms to accumulate a wealth of fans through bullet screen communications. Destination managers should leverage the influence of these bloggers to convert potential consumers into actual guests.”<sup>117</sup> The most popular travel live streamers have a significant following in China and have become trusted sources of information and inspiration for those planning their next travels. They have also become valuable partners for travel companies looking to reach and engage with potential customers. As a report by McKinsey has found, “Livestreaming has shown to be especially effective at cultivating return customers and quickly monetizing traffic. For example, an online travel agency (OTA) generated ¥80 million (\$12.4 million) in sales from a KOL-hosted livestreaming session on November 11, 2020 (a major shopping event in China), which contributed to a 135 percent increase in sales from the previous year. Another online brand, a bed-and-breakfast, collaborated with a travel blogger to host a livestreaming session on the theme of “creating desires,” which generated more than ¥2 million in two hours.”<sup>118</sup>

It’s not only about curated professional content: *user-generated content (UGC)* is important for inspiring Chinese younger generations to travel because it provides a more authentic and trustworthy source of information and inspiration for travel. UGC provides a more authentic representation of destinations, products, and services, as it is created by real people who have experienced them first-hand. This provides a more genuine and trustworthy source of information for those considering travel. This content is often created by people who are similar to the target audience, making it more relatable and inspiring for potential travelers, providing a wealth of

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<sup>117</sup> *Ibidem*

<sup>118</sup> CHEN Guang, ENGER Will, SAXON Steve, YU Jackey, *China’s travel sector is undergoing a nonlinear recovery: What should companies do?*, McKinsey & Company – Travel, logistics and infrastructure insights, 2021. Available at: <https://www.mckinsey.com/industries/travel-logistics-and-infrastructure/our-insights/chinas-travel-sector-is-undergoing-a-nonlinear-recovery-what-should-companies-do>

inspiration and showcasing the experiences and adventures that are possible. “Integrated social media platforms, specifically mobile apps, are accessed frequently in daily life, and may trigger the travel inspiration of those who have not considered the destination. Compared to social networking sites, information search and product review functions are more evident on Weibo and Xiaohongshu and thus likely to influence a wide range of consumer purchases, including travel.”<sup>119</sup> This makes UGC vital for the decision-making part of the traveler customer journey, making it an important tool for inspiring Chinese Gen-Z to travel, providing a more authentic, relatable, inspiring, and trustworthy source of information and inspiration.

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<sup>119</sup> WANG Zhuoli, HUANG Wei-jue, LIU-LASTRES Bingqie, *Impact of user-generated travel posts on travel decisions: A comparative study on Weibo and Xiaohongshu*, “Annals of Tourism Research Empirical Insights”, Volume 3, Issue 2, 2022.



## 4 HOW CAN ITALY CATER TO CHINESE NEEDS

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The influx of international tourists, particularly from China, has led to the need for Italian tourism to adapt and cater to their needs. As it was analyzed in the previous chapter, Chinese tourists have unique preferences and expectations, and it is crucial for the Italian tourism industry to understand and cater to these needs in order to attract and retain this important segment of the tourism market. This makes the next step of this research to be the analysis of the ways in which the Italian tourism offer can be tailored to the needs of Chinese tourists. After examining the current state of the Italian tourism industry, the preferences and expectations of Chinese tourists, the focus is now shifted towards the understanding of the role of culture, language, and technology in attracting Chinese tourists, as well as the benefits of collaborating with the Chinese tourism industry. By exploring these factors, this chapter aims to provide some insights into how the Italian tourism industry can effectively promote itself as a destination and what are the measures to take to make these specific tourists feel welcome.

First, it is important to consider the current Italian tourist offer for the Chinese market, and particularly the challenges that Italy has to face from Chinese operators' point of view: considering a report by Azzolina<sup>120</sup>, she found that Italy's tourism promotion towards China is poorly planned, inconsistent, and fragmented across the country. China's recent economic growth has made previously poor areas the center of new prosperity and higher spending power, however, tour operators who head towards these areas do so autonomously and not in a unified way. There are difficulties in obtaining visas, considering that some European countries issue visas within 24 hours, but in Italy, despite improvements, it still isn't enough, especially for FIT tourists. Little attention is given to tourists who decide to return to Italy for a second time and should receive incentives and facilities both at a bureaucratic and economic level. The presence of authorized and Chinese language-certified tourist guides is also scarce. This problem becomes even more serious when it comes to Chinese tourists with a certain level of preparation and genuinely interested in the Italian cultural and artistic heritage, who expect exhaustive and in-depth explanations.

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<sup>120</sup> AZZOLINA Maria-Rosa, *Stakeholder&Player del turismo cinese in Italia. Case History: Private Incentive Milano*, in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, 3, pp.117-124, 2016

After looking at the reasons why Chinese tourists choose Italy as a travel destination and how the country is seen by Chinese tourists (in chapter 3.1.1), and after looking at the possible critiques to the Italian tourist offering and promotion, the next step is to provide some general suggestions to focus on for the promotion of the country. As the main attractive to Italy is the “Made in Italy” brand, which is particularly prominent for the luxury tourism segment, the first steps should be towards attracting these particular tourists. Considering Global China of the Torino World Affairs Institute notes<sup>121</sup>, they recognized that Italy should strive to attain a prominent position in the luxury market, particularly with the growing trend of brand-conscious consumers who possess substantial wealth and spending power. Additionally, considering luxury and culture often go hand in hand, Italy should utilize its diverse and abundant cultural heritage and allocate considerable resources to promoting custom-made cultural experiences that cater to the desires of Chinese travelers who are passionate about exploring unique historical locations. The Chinese are enamored with the rich history and culture of Italy, particularly in cities such as Venice, Rome, and Florence. Some view Italy as a romantic destination, while others are becoming more knowledgeable about the quality of Italian wines and the reputation of Italian cuisine. Tapping into the preferences and the main motives of Chinese tourists to travel, considering the combination of the latest tourism trend in China, the characteristics of tourists from different travel segments and the reasons for which Chinese tourists come to Italy should become the main basis to create tourism products that are specifically catered to them.

So, if Italy wants to secure a portion of the Chinese tourism market, it must implement strategies that make Chinese tourists feel welcome and eventually foster loyalty, turning them into ambassadors who can promote the wonders of Italy to others in their home country, taking advantage of the importance of WOM, Word of Mouth when it comes to travel inspiration.

Considering the relationship between the countries and taking into account strategies on an official level, the main points to overcome the challenge that is constituted by the Chinese tourism market, as Italian ambassador in China Ettore Francesco Sequi<sup>122</sup> analyzed, can be summarized into the “5 Cs method”: continuity, concreteness, creativity, communication and credibility. This translates to

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<sup>121</sup> <https://www.twai.it/journal/tnote-55/>

<sup>122</sup> SEQUI Ettore Francesco, *Sistema Italia in Cina: continuità, concretezza, creatività, comunicazione e credibilità*, in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, 3, pp.117-124, 2016.

the concreteness of lines of action and initiatives; the continuity of the commitment of the official presence and the keeping of relations; the creativity in knowing how to devise new tools to make up for limited resources; communication to amplify the diffusion of our initiatives in a country of immense dimensions but by now perfectly interconnected through the most futuristic digital applications. It is also necessary to communicate better in China what Italy is and what it does: a unique country in terms of history, tradition, and culture, but also the cradle of innovation and advanced technological processes. Moreover, credibility, an even more essential requisite in a country guided by meticulous medium-long term planning and which involves public bodies (central and local) and private operators, who move en bloc with cohesion and unity of purpose, political and economic. This 5 Cs method has translated in various degrees of effectiveness to state-scale initiatives for Italian tourist promotion in China.

## 4.1 PROMOTIONAL INITIATIVES

There have been several state-scale tourism promotion initiatives launched by Italy to attract Chinese tourists and create a more *Chinese-friendly* tourism offer. All of these initiatives have the objective to overcome the challenges that the Chinese outbound tourism market provides and improving the reputation of Italy as a tourist destination, increasing the desire among Chinese tourists to visit the country. By creating awareness about Italy as a tourist destination among Chinese consumers, these promotional activities and initiatives can attract more tourists from China to visit Italy, by promoting the country's rich heritage and history which can help foster cultural exchange between the two nations, and promoting the cultivation of *guanxi*, the relationships between the two cultures, which can help Italian companies and official organizations build partnerships with travel agencies, tour operators, and other stakeholders in China.

The characteristics of these initiatives all rely on the guidelines of the “2017-2022 Strategic tourism development plan”<sup>123</sup> developed by the Italian Ministry of Cultural Heritage and Activities and

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<sup>123</sup> MiBACT - Ministero dei Beni e delle Attività Culturali e del Turismo, *Piano Strategico del Turismo 2017-2022*, 2016.

Tourism, a plan which establishes the main objectives for the Italian national tourist offer: the first objective is to innovate, specialize and integrate the national tourist offer; the second one is to increase the competitiveness of the tourism system, the third is developing an efficient and innovative marketing strategy, and the fourth point is to achieve efficient and participatory governance in the process of developing and defining the tourism plan and policies. As the introduction to the plan by minister Dario Franceschini states, this plan “strengthens Italy as a widespread museum and, proposing new destinations, relaunches the leadership of our country on the world market and identifies in sustainable and high-quality tourism, a tool of economic and social welfare for all. [...] This Plan marks an important change of direction for the tourism sector, providing for the first time to the “Italy of tourism” a unified framework in which institutions and operators share long-term strategies and medium-term objectives and lines of intervention.”<sup>124</sup> This plan puts the tourists as the main focus, developing travel experiences that adapt to them, and not vice versa. As the responsible for the General Direction for Tourism Francesco Palumbo noted<sup>125</sup>, the "Tourist at the Center" concept is a key theme for successful marketing in the Chinese market. This approach places the traveler at the heart of the travel experience, making sure all services and conditions cater to their needs and expectations. The rapidly changing tourist demand requires promotions to be calibrated to the needs of different travel segments and markets. Satisfying the traveler is not only important for maximizing their experience but also for promoting tourism as an engine of inclusion, education, and culture. Italy aims to promote its strengths, such as its cultural heritage, nature, fashion, food, and wine, factors to leverage in particular to attract high-quality Chinese tourism, as well as increase their quantity, towards our country.

After the Pandemic hindered all the possible positive intentions that the tourism development plan could have brought, the results of its application aren't yet tangible, but the initiatives that derived from it still retained its message. These are the most recent and notable ones:

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Available at: <https://www.ministeroturismo.gov.it/wp-content/uploads/2021/11/Piano-Strategico-del-Turismo-2017-2022.pdf>

<sup>124</sup> *Ibidem*

<sup>125</sup> PALUMBO Francesco, *Quali strategie per un turismo di qualità Chinese Friendly* in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, 3, pp.25-33, 2016.

### *M.it.i.ci. (Italian museums in China)*

M.it.i.ci. (In Italian short for “Musei Italiani in Cina”)<sup>126</sup> is a project that aims to promote and showcase Italian museums in China. The goal of the project is to bring the rich cultural heritage of Italy to a wider audience in China, and to increase cultural exchange and collaboration between the two countries. Through this project, museums in Italy have the opportunity to exhibit their collections and artifacts in Chinese institutions and venues, introducing Chinese audiences to the diverse artistic and historical treasures of Italy. The project also aims to foster cultural tourism between Italy and China by attracting Chinese visitors to Italian museums. Curated by the General Directory of Museums of the Ministry of Culture in collaboration with the digital marketing agency Digital to Asia in partnership with Alipay, it was launched during the 72° anniversary of the founding of the People’s Republic of China, also known as “Golden week”.

As the Italian Chinese Chamber of Commerce (CCIC)<sup>127</sup> has observed, the M.IT.I.CI project will improve the hospitality and cultural experience of Chinese visitors in the context of promoting museum activities. This will be achieved through the experience of cultural mediators and the development of strategic actions by Digital to Asia, providing both offline and online tools to showcase the beauty of Italy to the Chinese audience. The digital marketing agency will implement various strategies, including seminars accessible on Chinese digital platforms, informational materials and best practices guidelines, sustainable graphic material, web pages and 3D virtual tours, live streaming, and various promotion and marketing strategies through Chinese social media. Chinese tourists will also have the option to purchase tickets for museum visits directly online using their usual digital payment platforms. The museums involved in this project are exceptional examples of the Italian cultural and artistic heritage: they include the Royal Museums of Turin, the Royal Palace of Genoa, the Bargello Museums in Florence, the National Gallery of Ancient Art in Rome, the Ostia Antica Archaeological Park, Villa Adriana and Villa d'Este in Tivoli (Rome), the Royal Palace of Caserta, the Paestum and Velia Archaeological Park, and the National Archaeological Museum of Taranto (MArTA).

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<sup>126</sup> <http://musei.beniculturali.it/progetti/m-it-i-ci-progetto-di-promozione-digitale-dei-musei-italiani-in-cina>

<sup>127</sup> CCIC Camera di commercio italo cinese, *Digital To Asia: Al via M.IT.I.CI, il progetto di promozione digitale dei Musei Italiani in Cina*, 2021

Available at: <https://www.china-italy.com/it/digital-asia-al-mitici-il-progetto-di-promozione-digitale-dei-musei-italiani-cina>

### *ENIT flagship store on Ctrip*

As mentioned on chapter 3.2.1, OTAs are an essential tool for promotion in the Chinese tourism market. ENIT, the Italian national tourism agency, has opened on the leading OTA platform Ctrip an Italian Flagship store, which will act as an official source of information and travel inspiration for any Chinese interested in traveling to Italy. The Italian regions and artistic centers joined forces for an initiative to increase visibility of the Italian brand in China's digital space. This is part of a wider program to position Italy on the Chinese digital ecosystem. Using cutting-edge technology and the global travel group's large user base, the initiative connects directly with Chinese travelers. The flagship store, Italy on Ctrip<sup>128</sup>, is a central hub showcasing Italy's tourist image through travel itineraries, points of interest, promotional videos, and more. On the platform, ENIT highlights the main highlights of Italy as a travel destination: they use taglines such as “艺术国度” *yishu guodu*, kingdom of arts, highlighting the cultural relevance of its art cities, “意式美食” *yishi meishi*, Italian cuisine, for the world famous Italian dishes and quality of food, “山地度假” *shandi dujia*, mountain resort, tapping into the outdoor tourism trend and providing some sport tourism options, “购物天堂” *gouwu tiantang*, shopping paradise, focusing on high-end fashion and artisan boutiques, and finally “海滨风光” *haibin fengguang*, seaside charm, with emphasis on the beauty of the marine landscapes.

The platform is constantly updated and available in a mobile app version on Trip.com Group's new travel marketing hub, Star Hub, and also has a satellite channel on the popular social media platform Weibo. Italy, through ENIT, is one of the first countries to have its own official profile on Ctrip. The initiative also includes a digital marketing campaign and a live streaming event with Chinese KOLs. This is part of ENIT's broader strategy to have a strong presence on major Chinese digital platforms, including social media, multimedia content production, and two WeChat Mini Programs for B2B and B2C purposes.

As ENIT president Giorgio Palmucci stated: "Digital technology has become an incentive to increase user interest in new forms of tourist experiences, such as virtual guided tours to museums, reading, theater performances, or online concerts. These experiences encourage users to access the Italy experience. Tourism can be recalibrated by intertwining it with innovative paths and investments in

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<sup>128</sup> <https://fs.ctrip.com/italypc>

merchandizing and platforms. This creates not only a sense of widespread belonging and roots for Made in Italy in the world, but also a desire to amplify Italy's multifaceted and constantly evolving offerings."<sup>129</sup>

### *Vento d'Italia (意风)*

A less-known promotional initiative, the “Vento d'Italia” project<sup>130</sup> aim is to promote Italian excellence in China by combining digital promotion of Italian tourist destinations and e-commerce of the regional excellences. Launched in 2018, it is worth mentioning as it is sponsored by Enit and received MiBACT funding (Italian Ministry of Cultural Heritage and Activities). This project relies on the interdependence of the tourism and production sectors, promoted through coordinated storytelling on the Vento d'Italia digital platform on WeChat, the most widespread *social commerce platform* in China. The platform is a marketplace that promotes destinations and local production excellence. Attracting Chinese tourists to Italy requires preserving historical-artistic heritage and lifestyle, as well as supporting local producers. The Vento d'Italia platform on WeChat connects tourists with local experiences and products. The goal is to have a positive impact on the territory through digital innovation while respecting community and history.

### *The "Chinese friendly Italy" initiative (意大利、中国之友)*

The “Chinese friendly Italy”<sup>131</sup> initiative was launched in 2015 and aims to enhance cultural and economic exchange between Italy and China, as well as to promote Italian tourism in China. It represents hotels, tour operators, destinations, museums, restaurants, and others who want to host Chinese tourists and offer customized proposals. It releases the “Chinese Friendly Italy” label to the requesting facilities, issued after an evaluation of the minimum standards of hospitality towards the Chinese tourist. These include knowledge of the Chinese tourist market, reception standards, language standards, F&B standard and, for accommodation facilities, room standards. They are present throughout Italy, in major cities and small towns, and offer both classic and off-the-beaten-path tours, sustainable tourism, and MICE. The website features facilities selected for respect for

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<sup>129</sup> CICATELLI Francesca, *L'Italia con ENIT lancia il primo flagship store in Cina*, Comunicato stampa Enit – Agenzia Nazionale del Turismo, 2021.

Available at: <https://www.enit.it/it/litalia-con-enit-lancia-il-primo-flagship-store-in-cina>

<sup>130</sup> <https://www.ventoditalia.it/>

<sup>131</sup> <http://www.italychinafriendly.com/>

Chinese culture and hospitality standards, preserving Italian identity. The project is managed by Professor Giancarlo Dall'Ara, an expert in Chinese tourism.

#### *The "China-Italy Year of culture and tourism"*

It couldn't not be mentioned again, but the "Italy-China year of culture and tourism" is the most important official initiative endorsed by the two country governments to date. This initiative, as already extensively explained in chapter 1.1, was first launched in 2018, and aims to promote cultural and tourism exchange between the two countries and to increase the number of Chinese tourists visiting Italy.

As mentioned above, these initiatives are part of a larger effort by the Italian government to attract more Chinese tourists and promote the country as a top tourist destination in the world. By leveraging cultural exchange, fashion, food, and film, Italy aims to appeal to the unique preferences and interests of Chinese tourists.

#### 4.1.1 Web marketing and promotion for the 2022 year of culture and tourism

As the most notable official event for the development of tourism between Italy and China, the "2022 year of culture and tourism" is worth a further analysis in terms of the actions taken for the digital promotion activities of the Italian government towards China. The web marketing plan<sup>132</sup> developed by ENIT (the Italian national agency for tourism) in collaboration with the Italian embassy in Beijing and the consular offices is carried out on the most popular social media platforms in China<sup>133</sup>, utilizing the most widely used forms of communication. ENIT took advantage of its already established WeChat, Weibo and Ctrip accounts to carry out new promotional activities developed for the event:

On the Italian official account on WeChat ENIT launched an event called the "*Shipinhao National Livestream - Extraordinary Holiday in Italy campaign*", a video marathon involving Cortina, Milan, Cremona, Florence and Rome, also promoted on People's Daily. Italy also has his own WeChat mini-program, a platform specifically designed for Chinese travelers who are planning a trip to Italy. It

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<sup>132</sup> <https://www.annoitaliacina.it/en/tourism>

<sup>133</sup> See Annex 1 for the list and the description of the most popular social media in China.



offers useful information and resources to help with trip planning, including information about destinations, suggested itineraries, popular attractions, and promotional videos showcasing the best of what Italy has to offer. This Mini Program, other than a promotional device, also helps Chinese tourists overcome the problem of lack of information in Mandarin Chinese during the trip and the difficulty in using WeChat pay, which can be used for the in-app transactions.

ENIT has also intensified its presence on the social networks Weibo and Douyin, with the development of short videos specifically designed for the Chinese market. Other than short videos, the digital marketing plan for the “2022 year of culture and tourism” included livestreaming and KOL marketing, effective strategies for the digital promotion in the Chinese market. An effective campaign that has been carried out has been a series of videos with the actor and social media star Liu Haoran<sup>134</sup>, titled “#Myitalianjourney”, the promotion project involved the creation of a short documentary featuring Liu as the narrator. He shares his personal experiences and insights from his travels in Italy, visiting a variety of destinations such as Florence, Verona, the Dolomites, Rome, and Matera, which was designated as the capital of culture in 2019. The documentary showcases the beauty and uniqueness of these destinations, with the tagline “Find more, find yourself” suggesting that travelers can discover more about themselves through exploring these places.

The content on the “Italia” official flagship store on Ctrip has also been incremented, with a collaboration with different Italian regions showcasing information about the various destinations involved. The platform includes itineraries, points of interest, promotional videos, and other useful information for travelers, and it is also constantly updated with new content. It is also available in a mobile app version, integrated within Trip.com's new travel marketing hub, Star Hub. As livestreaming has become an important marketing tool for China, Ctrip and ENIT collaborated to create a special live stream with two KOLs called “暖暖冬”意”, 探索不一样的意大利”, “Italian



Figure 14 QR codes for the Wechat official account and Wechat miniprogram of ENIT.

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<sup>134</sup> [https://www.esteri.it/it/sala\\_stampa/archivionotizie/retediplomatica/2019/02/cina-il-viaggio-in-italia-di-una-star-del-cinema-e-dei-social/](https://www.esteri.it/it/sala_stampa/archivionotizie/retediplomatica/2019/02/cina-il-viaggio-in-italia-di-una-star-del-cinema-e-dei-social/)

*mild winter, exploring a different Italy*”, with the aim to promote the Italian Alps, winter sports, and the Italian mountain lifestyle to a Chinese audience.

ENIT has also started a collaboration with the famous OTA “Tongcheng-Elong”, a competitor of Ctrip, to expand their presence on the Chinese digital environment. On the platform, the national tourism board has started a new digital marketing campaign, with a personal web page focused on promoting Italy's UNESCO heritage sites and cultural tourism experiences, connecting with the “world heritage sites twinning initiative”. To further promote this twinning initiative ENIT has also created another WeChat mini program that features virtual visits to the famous Italian cities of Florence, Venice and Palermo, giving its users the possibility to have virtual travel experiences.

In conclusion, the marketing plan developed by the Italian national agency for tourism (ENIT) to promote Italy to the Chinese market through popular social media platforms such as WeChat, Weibo, and Ctrip, utilized a variety of strategies such as video marathons, short videos, livestreaming, KOL marketing, and mini-programs to showcase the beauty and uniqueness of Italy. ENIT's collaboration with OTA Tongcheng-Elong and the creation of a digital marketing campaign to promote Italy's UNESCO heritage sites and cultural tourism experiences further demonstrate the efforts made by the Italian government to attract Chinese tourists. ENIT's digital promotion activities were effective in reaching and engaging the Chinese audience, demonstrating the growing understanding of this market and the importance of creating specific contents to cater to it.

#### 4.1.2 Welcome Chinese Project

"Welcome Chinese "<sup>135</sup> is the only official international certification for the guarantee of quality Chinese tourism hospitality, a project intended for enhancing the travel experience of Chinese tourists visiting travel destinations by offering a range of services and facilities that cater to their specific needs and preferences. The enterprise also promotes the use of digital tools and technologies to improve communication and provide relevant information to Chinese tourists. The goal of the "Welcome Chinese" for Italy, and for every other foreign destination, is to create a more accessible, welcoming, and memorable experience for Chinese tourists visiting Italy. Being

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<sup>135</sup> <https://www.welcomechinese.com.cn/>

the official certification body for Chinese tourist hospitality, recognized by the PRC government, its goal is to improve services for Chinese travelers, working in collaboration with the official entities of China Tourism Academy (CTA) and the Chinese National Tourism Authority (CNTA). The certification program is also supported by CCTV (China Central Television), China Union Pay, and Ctrip among others.

Founded in 2013, but developed from 2008 by Jacopo Sertoli, CEO of Select Holding (a travel agency), it became a privileged partner of the Chinese government. In 2018, Select Holding was selected by the European Travel Commission as the exclusive international marketing company for the Welcome Chinese certification for 10 years. It provides assistance to the international travel industry and promotes certified activities on [welcomechinese.com.cn](http://welcomechinese.com.cn). The certification receives further support from China Central Television and China Union Pay. The reason for its funding is explained thoroughly in Sertoli's words: "The growing presence of Chinese tourists abroad has made it essential to focus on their demands and needs: the gap between the services offered by the international tourist market and the expectations of Chinese customers had to be filled. The "Welcome Chinese" certification is the answer to this fundamental need." <sup>136</sup> Italy has been supporting this project from the start, being a popular destination among Chinese travelers.

There are several kinds of certifications for all kinds of travel services that can guarantee the optimal experience for Chinese tourists, which include hotels, airports, airlines, shopping malls, attractions, railway stations, rail companies, museums, and restaurants<sup>137</sup>. For each category Welcome Chinese offers a specific certification with some standards to meet for obtaining it; for example, Airports can obtain the *Red certification* if they provide as standard services: Union pay payment, free Wi-Fi, hot water dispenser, website in Chinese, possibility of tax refund and flight information in Chinese. Hotels have access to two levels of certification: the *Jade certification* (providing Union pay payment, newspapers in Chinese, free Wi-Fi, water kettle, and CCTV channels), and the *Gold certification* (all the requirements for the jade certification plus Chinese speaking staff, "Welcome Chinese" kit, Chinese breakfast and discounts for Chinese cardholders). With the payment of an annual fee the organization offers digital visibility in China, PR activities on

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<sup>136</sup> [https://www.confcommerciomilano.it/it/impresa\\_istituzioni/news/Welcome-Chinese-firma-laccoglienza-per-i-turisti-cinesi/](https://www.confcommerciomilano.it/it/impresa_istituzioni/news/Welcome-Chinese-firma-laccoglienza-per-i-turisti-cinesi/)

<sup>137</sup> <http://www.welcomechinese.com.cn/company/>

Chinese events, promotion and representation services, online training and business intelligence solutions.

Some of the services that obtained this certification in Italy are Italo, the Roma Fiumicino airport and, most notably, Trenitalia, the Italian national railway service. They obtained the Red certification in 2014, as Trenitalia's Frecciarossa and Frecciargento trains started featuring displays with welcome messages and travel directions in Italian, English, and Chinese. Onboard Frecciarossa trains, traditional Chinese dishes can also be requested from the menu. Trenitalia's website has a Chinese version, which has received over 20,000 hits in the first 15 days of activation. Mandarin Chinese information material is also available at assistance points and ticket offices at the main high-speed network stations. Additionally, customers have the option to make purchases from the Trenitalia network using a China UnionPay credit card<sup>138</sup>, another one of the main standards requested to obtain the certificate.

### 4.1.3 Regional promotion

Aside from the Italian national tourism promotion activities carried out mainly by ENIT, there are several Italian regional tourism initiatives aimed at promoting their respective regions in the Chinese outbound tourism market. Some examples include:

*Tuscany* has been actively promoting itself as a destination in China, with a focus on showcasing its rich cultural heritage, beautiful countryside, and high-end wine and food experiences. As an article by the regional news site "intoscana"<sup>139</sup> presented, the "托斯卡纳，无限的文艺复兴" (*Tuscany, The Infinite Renaissance*) live streaming event, featuring two well-known Chinese influencers, aims to bring China and Tuscany closer together through the "Smart China"<sup>140</sup> project. Developed in collaboration with Fondazione Sistema Toscana, the project's goal is to present Tuscany's diverse range of tourist products to a wider audience on television, the web, and social media, as well as make booking packages easier for tourists, potential visitors, travel agencies, and Chinese tour

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<sup>138</sup> <https://www.repubblica.it/ultimora/24ore/Fs-Trenitalia-ottiene-certificazione-welcome-chinese/news-dettaglio/4578381>

<sup>139</sup> <https://www.intoscana.it/it/articolo/cina-toscana-turismo-wechat/>

<sup>140</sup> <http://www.toscanapromozione.it/magazine/smart-china-e-digital-la-toscana-che-guarda-alla-cina-e-al-futuro/>

operators through commercial channels. The initiative has involved 480 hospitality establishments, 90 service companies, and 118 tour operators and DMOs (Destination management organizations), for a total of 688 Tuscan sector operators who have expressed interest in the Chinese market and participated in the various phases of the "Smart China" project. This ambitious project aims to be present and easily recognizable in the Chinese market, which is one of the most significant for Tuscan tourism and will likely be one of the first to recover internationally, as evidenced by the data showing a timid recovery within the country. The three coordinated promotion activities include dissemination and communication, promotion, and commercialization, all aimed at the vast Chinese market. The first is a co-production with CCTV, the state television network, which airs an eight-part documentary about Tuscany to showcase its culture, history, landscape, and heritage. The second is via WeChat, where the official regional tourism entity<sup>141</sup> has its own account, and the third through Ctrip Group. By involving these platforms and tour operators, Tuscany aims to promote its many attractions to Chinese tourists, boost cultural exchange, and ultimately forge a stronger relationship with China.

*Lombardy*, home to the city of Milan, has been promoting itself as a fashion and shopping destination in China, leveraging its reputation as a fashion capital and the popularity of Italian luxury brands among Chinese consumers. "Regione Lombardia"<sup>142</sup>, in partnership with Explora, started a new multi-year tourism promotion project on the Chinese market in 2016. The main objectives were to increase awareness of the region and its diverse tourist attractions, enhance the safety of tourist experiences, strengthen relationships and training activities with Chinese tourism operators, and attract potential Chinese tourists for upcoming international events. The project featured both B2B and B2C communication, digital channels and tools, and special promotional initiatives, including a digital campaign co-financed by the European Travel Commission. As part of the project, a popular influencer created promotional videos featuring Lombardy's beauty and culture. The tour covered a range of cultural, historical, and scenic sites in Lombardy, showcasing the region's unique charm and appeal to Chinese tourists. Another tourism promotion project worth mentioning is "Experience Milano"<sup>143</sup>, launched in 2019 by the Milan Chamber of Commerce and the Municipality of Milan. This project aim is to present Milan to the Chinese public through digital channels. The official

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<sup>141</sup> <https://www.visittuscany.com/it/index.html>

<sup>142</sup> <https://explora.in-lombardia.it/attivita-di-promozione-turistica-sul-mercato-cina/>

<sup>143</sup> <https://www.confcommerciomilano.it/it/news/news/Aderire-a-Experience-Milano-progetto-di-promozione-turistica-verso-il-mercato-cinese/>

WeChat account, 探索米兰 (Explore Milano, also called YesMilano), is dedicated to users located in China. This channel will provide all the necessary information to showcase Milan as a great tourist destination, and offer practical guidance for staying in the city and exploring the surrounding area. Through YesMilano 探索米兰, the Milan brand will directly communicate with its Chinese followers, providing support from trip planning to staying in the city.

*Veneto*, home to the cities of Venice and Verona, has been promoting its rich cultural heritage and historical attractions, including the iconic city of Venice and its stunning canals, as well as the stunning palaces and art collections of Verona. It's important to mention that Venice has always had a special connection to China, being the end destination of the maritime Silk Road and of the Ancient Silk Road of Marco Polo. This city was also chosen for the opening ceremony of the "2018 China-UE year of tourism"<sup>144</sup>, at Palazzo Ducale. During the pandemic, Antonia Sautter<sup>145</sup>, an entrepreneur and fashion designer from Venice, brought the magic of the Venice Carnival to China through a two-hour live-streaming session on Fliggy. This digital initiative, which aimed to celebrate the city's 1600 years of history and honor its relationship with the East, was well-received by the Chinese audience, with over 60,000 views and 50,000 likes. The collaboration with Fliggy to promote the Italian art and culture to the Chinese public, despite the strong limitations on international travel was successful. This experience showcased the luxurious fabrics, silk, and embroidery that speak of Venice's history and its ties to the East. It was an incredible opportunity for Chinese tourists to admire the cultural and artistic heritage of Venice and learn about its Carnival, even though they couldn't travel due to the pandemic. This innovative collaboration between Antonia Sautter and Fliggy is a remarkable example of how technology can bring people and cultures closer, even in the face of adversity.

These are just a few examples of regional tourism initiatives aimed at promoting Italy as a travel destination to Chinese tourists. In conclusion, various Italian regions are actively promoting themselves with different initiatives. These include co-production with state television networks, social media promotions, and digital campaigns that showcase the beauty and charm of Italy to the Chinese public. These efforts aim to forge a stronger connection with Chinese tourists, offer them a memorable and unique experience, and promote cultural exchange between Italy and China.

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<sup>144</sup> [http://www.xinhuanet.com/world/2018-01/20/c\\_1122287921.htm](http://www.xinhuanet.com/world/2018-01/20/c_1122287921.htm)

<sup>145</sup> <https://www.china-files.com/china-e-files-turismo-la-storia-di-veneziana-sbarca-in-cina-con-fliggy/>

## 4.2 CREATING A “CHINESE FRIENDLY ITALY”

After seeing the effort that both official and private entities are making to promote Italy in the Chinese outbound tourism market, the next important aspect to analyze is how to provide the best experience possible to Chinese tourists when they come visit Italy, creating what can be described as a “Chinese friendly Italy”. This is an important step towards the fostering of loyalty of Chinese tourists, increasing the chance for them to return and promoting Italy as a travel destination to their peers, making them “ambassadors” of the country abroad.

To create a friendly environment to welcome Chinese tourists, first, there should be a better understanding of the modern Chinese traveler, without falling into stereotypes. Then, an understanding of the social protocols that are followed in China is another main aspect of creating welcoming relationships, with the focus on demonstrating curtesy and humbleness. The concept of “*面子 Mianzi*”, meaning the concept of “face”, is very important to Chinese people, and as an analysis by Teon<sup>146</sup> defines it, it is a sociological term that describes the way people presents to others, how they want to be described and perceived by others, referring to the prestige and image of an individual in a society. A study titled “The role of face in Chinese tourists’ destination choice and behaviors”<sup>147</sup> emphasizes how travel destinations should offer face-gaining travel experiences to increase their attractiveness to Chinese visitors. When creating new tourist products, tourism planners and tour operators should think about what Chinese tourists see as experiences that will make them “gain face”. By providing these kinds of experiences, the destination can improve its image in the minds of Chinese tourists. It's suggested to promote luxury and personalized tours, as well as attractions and unique activities that would make good social media posts. As Chinese tourists become more sophisticated and well-traveled, offering experiences that create lasting memories and encourage social media posts can be beneficial for both the tourist and the destination, as it increases interest in the destination and gives the tourist an opportunity to show off their experiences to their network. In this sense, the concept of “face” becomes essential both

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<sup>146</sup> TEON Aris, *The Concept of Face in Chinese Culture and the Difference Between Mianzi and Lian*, 《the Greater China journal》, 2017.

<sup>147</sup> CHEN Li-Hsin, LOVERIO Jennifer Paison, WANG Mei-Jung, et al., *The role of face (mien-tzu) in Chinese tourists’ destination choice and behaviors*, 《Journal of Hospitality and Tourism Management》, Vol. 48, pg 500-508, 2021.

in the planning of a tourism product and when dealing directly with Chinese tourists, being aware of not making actions that can make them “lose face”.

With regards to face-to-face interactions, as it was mentioned it is important to understand the Chinese social protocol, as well as understanding some cultural aspects that can affect Chinese tourists’ sensitivity. As the UNTWO report “Guidelines for the Success in the Chinese Outbound Tourism Market”<sup>148</sup> describes, there are certain DOs and DON’Ts of welcoming Chinese tourists:

#### DOs

Smile – Chinese people value non-verbal communication.

Allocate hotel rooms with the numbers 6, 8 or 9, all are considered lucky.

Pay compliments and offer other forms of respect such as giving small gifts.

Use some basic Chinese phrases as a mark of respect.

Handle items such as dishes and documents with both hands as a sign of respect.

Treat complaints seriously and be prepared to formally apologize.

Deal with the group leader or most senior member.

#### DON’Ts

Don’t give Chinese tourists a fourth-floor room as number “4” resembles death in Chinese language.

Don’t raise politically sensitive issues such as human rights or independence without great care.

Don’t correct or contradict people in public – or say anything that causes them to lose face.

Don’t put someone’s business card in your pocket without being seen to read it first.

Don’t Expose groups to long queues or make them wait for service.

All of these precautions are a must when dealing face to face with Chinese tourist, it's important to consider these social protocols when welcoming Chinese tourists as they are an integral part of Chinese culture and are deeply ingrained in their social norms and expectations. Failing to adhere to them can lead to misunderstandings and a negative experience for tourist. By understanding and following these protocols, such as proper greetings, gift-giving customs, and table manners, tour operators and tourism planners can provide a welcoming and culturally sensitive experience for

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<sup>148</sup> World Tourism Organization, *Guidelines for the Success in the Chinese Outbound Tourism Market*, UNWTO Madrid, 2019.



Chinese tourists, leading to a more enjoyable and memorable trip, and a stronger connection between the destination and the tourist. This can also help to establish a positive reputation and increase the likelihood of repeat visits and recommendations to friends and family.

To increase repeat visits, the UNTWO guidelines<sup>149</sup> also provide some tips to encourage them: first, it is important to strengthen the authenticity of the host destination by emphasizing its unique culture and heritage, providing dedicated services to Chinese visitors. To ensure easy accessibility, it is important to provide clear information and easy-to-use travel resources, as well as to pay attention to authentic and certified guides. Additionally, it is crucial to check the pricing of products and services, avoiding any excessive costs, and to encourage and facilitate digital payment methods, which are becoming increasingly popular among Chinese tourists. Incentives such as loyalty programs or special offers for repeat visitors can also play a role in encouraging them to return. Finally, creating new and innovative experiences can help to keep the destination fresh and exciting for visitors, and can increase the likelihood of repeat visits. The guidelines by the official tourism certification “Welcome Chinese” also provide some valuable suggestions for the different tourism services to increase their attractiveness with Chinese tourists:



Figure 15 "Welcome Chinese" tips for a better experience for Chinese tourists in hotels<sup>150</sup>

Other than these factors, there are also some other requirements for tourism services and facilities to ensure that they are able to welcome Chinese tourists to their best, and they all rely on digital accessibility. As Chinese tourists are tech-savvy and rely heavily on digital tools, it is important for

<sup>149</sup> *Ibidem*

<sup>150</sup> Welcome Chinese, *Certification hotels*, 2016.

Available at: [http://www.welcomechinese.com.cn/wp-content/uploads/2016/06/Certification\\_Hotels.pdf](http://www.welcomechinese.com.cn/wp-content/uploads/2016/06/Certification_Hotels.pdf)

tourism services and facilities to have a strong online presence and offer digital services, such as online booking, digital maps and mobile payment options. Free Wi-Fi is also an important service that Chinese tourists value, and the use of QR-codes is familiar to them, so they should be utilized. “Five essential actions are made with QR-code in the Chinese digital eco-system: pay, connect, follow, access to information, register.”<sup>151</sup> The use of this technology can also help overcome the language barriers, implementing them to showcase materials in Mandarin Chinese when there is a lack of, for example in menus, signs, etc. According to a “Market Research Report on Chinese Outbound Tourist (City) Consumption”<sup>152</sup>, reducing tourists’ concerns is another main element to make them feel welcome and increasing their possibilities to return, and being that language difficulties are the main concern before their trip, QR codes and digital content are one way to quickly try to solve this problem.

Overall, creating a "Chinese friendly" environment in Italy is crucial to attracting and retaining Chinese tourists. To achieve this, a better understanding of the modern Chinese traveler and their social protocols, as well as cultural aspects that can affect their sensitivity, is necessary. By adhering to Chinese social norms and providing a welcoming and culturally sensitive experience, tour operators and tourism planners can establish a positive reputation and increase the likelihood of repeat visits. Additionally, offering digital services and providing clear information, accessible pricing, and incentives, such as loyalty programs and innovative experiences, can help to attract and retain Chinese tourists. The use of digital tools, such as online booking and mobile payment options, as well as QR-codes and Mandarin materials, can help overcome language barriers and provide a more seamless experience for Chinese tourists. To create a successful "Chinese friendly" environment, a holistic approach is needed, considering both official and private entities' efforts, and the cultural and digital needs of Chinese tourists.

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<sup>151</sup> EUSME Centre, *Chinese Outbound Travelers*, 2019.

Available at: <https://www.eusmecentre.org.cn/publications/chinese-outbound-travellers/>

<sup>152</sup> WTOF “世界旅游城市联合会” World Tourism cities federation, 《*Market Research Report on Chinese Outbound Tourist (City) Consumption*》, 2018.

### 4.2.1 Companies need to rebuild demand for Chinese tourists

China has long been a significant market for global tourism, and the pandemic-related restrictions of the past three years have had a major impact on the industry. As countries prepare to welcome back Chinese tourists, it is essential to understand what companies can do to rebuild demand for them and how to rethink their services to make them more appealing. As professor Gavinelli correctly states, “the idea that Italy “sells itself” should be abandoned, and a new era has started, where Italy should increment the receptive capacity of the most popular tourist sites in a responsible and sustainable way, to learn to link the major national destination with less-known ones, to increase the offer of national and international tour operators.”<sup>153</sup>

First and foremost, as it was mentioned in chapter 3.1, it is essential to understand that the Chinese outbound travel market is not homogenous. It is segmented, with experienced independent travelers, including millennials, Gen-Z, and luxury travelers, expected to be the first wave of long-haul travelers in 2023. These independent travelers, especially those from younger generations, will seek new destinations, and the game is no longer to go where everybody goes, but to discover new places that not many Chinese have visited before. This for Italy means promoting and adapting the tourist offer of less-known cities and destination among international visitors.

To attract Chinese travelers, destinations and brands need to take a fresh approach that speaks to the Chinese traveler who has spent three years away from the world. According to a Bloomberg report<sup>154</sup>, they found some major adjustments that destinations and brands need to consider. First, as we mentioned, they need to understand the diverse needs of Chinese travelers. Value for money has become important, and spending on experiences and learning is now considered more impressive than spending money for shopping. Secondly, destinations and brands should let go of mass tourism. The younger market has become increasingly aspirational, with platforms like Xiaohongshu (Little Red Book) tying up with tourism trends for the younger market, creating also a more luxury-focused tourism experience. Thirdly, communication on safety is essential. Even the slightest perception that Chinese travelers could be subjected to racism in a place or treated poorly because they are Chinese could have significant consequences. Tourism boards must lay out the

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<sup>153</sup> GAVINELLI Dino, *Obiettivo Italia: i turisti cinesi, nuovi utenti del patrimonio materiale e immateriale del Bel Paese*, in «Mondo Cinese, Rivista di Studi sulla Cina Contemporanea», 160, 2016, p. 99-108.

<sup>154</sup> <https://www.bloomberg.com/news/articles/2023-01-16/5-ways-tourism-needs-to-improve-in-2023-to-attract-chinese-travelers>

welcome carpet, and hotel managers will need to train frontline workers to receive Chinese travelers adequately to make a good first impression. Health safety and hygiene are also important post-pandemic requirements. Fourthly, destinations and brands must offer value-packed experiences. The absence of discount tour packages means that Chinese travelers are looking for value for money, and the increased costs of travel have made this more critical.

A China Briefing report<sup>155</sup> adds some other suggestions for companies who wish to better cater to Chinese tourists and create better tourist products for this market. Innovation is key to the development of China's tourism products. New payment options, improvements in the flow of funds among tourism market players, and the launch of full-fledged fintech solutions have changed the way the travel sector does business. This confluence of finance and travel is set to continue, and it is expected that airlines, hotels, and travel agencies may modify their customer loyalty programs to encourage clients to utilize their specialized services. In addition, the COVID-19 pandemic has accelerated the pace of construction of smart scenic spots. Self-guided tours, small group tours, and customized tours with less contact with strangers are preferred. Online platforms and the travel app of the scenic spot allow tourists to learn about their destination, find information to support travel route planning, book tickets for scenic spots and hotel accommodation, and even shop for souvenirs in advance. The deepening of the integration between Internet and tourism has become the driving force for tourism development in China, with the inclusion of information communication technology and the integration of artificial intelligence, which is already changing China's hospitality sector and it will motivate other countries' to embrace innovation in the same way.

All of these suggestions can be furtherly applied to the singular services in the industry, creating new opportunities for them to rebuild the demand and grow as companies. Based on suggestions from the “Chinese tourists: Dispelling the myths - An in-depth look at China’s outbound tourist market” study<sup>156</sup>, these tips are also based on the tourist segmentation of chapter 3.1.2.

The first travel industry sector to explore is the travel agency one. Outbound tourism is key to the travel agency and high-end tourism markets, outpacing overall market growth. Marketing to different traveler segments is important, understanding how to reach these different segments and

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<sup>155</sup> <https://www.china-briefing.com/news/chinese-tourism-2022-trends-and-opportunities/>

<sup>156</sup> DITCHER Alex, CHEN Guang, SAXON Steve, YU Jackey, SUO Peimin., *Chinese tourists: Dispelling the myths - An in-depth look at China's outbound tourist market*, McKinsey&Company, 2018.

how to provide them the most suitable product. High-income consumers seek unique and customized experiences, as it was mentioned in often in less-traveled destinations, and are most likely to use online channels to purchase trips. To attract high-end travelers, travel agencies should provide unique and customized services and curate offerings by applying customer insights and acquiring access to high-end customers. In this sense, especially in this era of high digitalization, the development of a better online presence is crucial. Another factor that will impact the activity of travel agencies is the resume of group tours, which were banned for the first month after the reopening, as Global Times interview with Zhang Yan, outbound tour services director of Trip.com shows: “We predict there will be an increase in the number of outbound group tours as well as tourists starting from March, but it requires time for the recovery of the market as many Chinese restaurants overseas shut down due to the pandemic and many guides changed jobs, [...] China's resumption of outbound group tours could bring more than \$200 billion back to international tourism, the Financial Times reported in January”<sup>157</sup>.

Another tourism sector which will need consolidation is the travel retail industry. Airports are important locations for building a brand's image and awareness. Brands are going direct and establishing partnerships with vendors for potential value propositions. Chinese consumers are more focused on health and wellness, resulting in changes in duty-free sales, and with the emergence of cross-border e-tailing there have been further changes in the industry, especially after the resurgence of e-commerce during the pandemic. The target retail customers include three archetypes: Individualist, Shopper, and Sophisticated Traveler <sup>158</sup>, with Shopper having high spending potential. It is important to be aware that Chinese travelers are becoming more price savvy and plan shopping in advance through digital platforms.

Lastly, the hotel industry, with hotel brands competing to attract Chinese tourists, and global hotel groups focusing on strategic mergers and acquisitions to meet diverse customer needs. Local brands are introducing mid-high-end and lifestyle-focused brands, while boutique hotels are carving out a market niche by showcasing local culture and providing unique experiences. Travelers across different segments have varying preferences for hotels, with midrange hotels being the most popular overall, but hotel brand and quality become more important aspects for long-haul

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<sup>157</sup> <https://www.globaltimes.cn/page/202302/1284852.shtml>

<sup>158</sup> See chapter 3.1.2 for the specifics of these tourists segments.

destinations. As an article by CNBC travel has found, there has been a growing demand for high-end and luxury hotels: “Consumers appear more willing to increase spending on hotel accommodation for their trips vs. pre-Covid, with 20% citing it as their top travel expense compared to 17% each in 2017 and 2020. [...] 37% of the consumers prefer higher star-rated hotels, up from 18% in 2020, with higher-income consumers showing even stronger appetites for luxury hotel stays (47% vs. 31% in 2020)”<sup>159</sup>. Lastly, hotels must be aware and adapt to the changes that their Chinese counterparts have adopted during the Pandemic in China, as EHL insights<sup>160</sup> has found that in response to the COVID-19 pandemic, hotels have had to implement various strategies to adapt to the changing circumstances and protect their businesses. One strategy is to provide food delivery services from hotels, which can help to recover revenue and avoid waste by utilizing existing inventory. However, it's important to adapt the menu and find suitable partners to ensure seamless delivery and appropriate pick-up procedures. Another strategy is to implement contactless service, using measures like hand sanitizers and occupancy quotas to minimize cross-infection, as well as more high-tech solutions like robots and apps to provide self-check-in/out and deliver goods to guest rooms. Implementing these changes may require significant capital investment, but hotels can also use existing resources to reformat service procedures and reduce points of contact. Hotels can also negotiate cancellation policies with Online Travel Agencies (OTAs) to reduce pressure on cash flow, while taking cost-saving measures like rearranging shift schedules and clearing out annual leaves and overtime hours. To maintain motivation among employees, hotels can also provide online training and prepare by dimensioning the team according to the services planned. These measures can help hotels emerge stronger in the current recovery phase.

In conclusion, as countries prepare to welcome back Chinese tourists, it is essential for companies to understand how to rebuild demand and rethink their services. To attract Chinese travelers, destinations and brands need to take a fresh approach that speaks to Chinese travelers, and need to understand their diverse needs, provide value-packed experiences, and communicate safety effectively. Overall, the tourism industry needs to adapt and innovate to meet the needs of Chinese travelers and build a sustainable and responsible tourism market.

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<sup>159</sup> <https://www.cnbc.com/2023/02/10/chinese-travelers-want-luxury-travel-and-hotels-survey-shows.html>

<sup>160</sup> <https://hospitalityinsights.ehl.edu/chinese-hoteliars-coronavirus-crisis>

## 5 CONCLUSIONS

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The objective of this thesis was to analyze how the Pandemic has affected the *incoming* Chinese tourists in Italy and the new trends and needs that derived from it, to try and answer the questions “What are the possibilities that come from the return of Chinese tourists in Italy?” and “How can the Italian hospitality industry better cater for Chinese tourists going forward?”. To achieve this goal, the analysis adopted a comprehensive approach, considering both the broader picture of tourism between Italy and China, and the more practical implications for developing an effective promotional strategy and better tourism products that fit Chinese tourists needs. The overall research took into consideration how China and Italy currently interact with each other in terms of tourism policies, and what the future might hold for their relationship. It also examined how the COVID-19 pandemic has affected the tourism industry. When dealing with Chinese tourists, important things to consider are marketing, hospitality practices, digital promotion, and advertising. Additionally, the study took into account the attitudes and behaviors of Chinese travelers towards Italy as a destination and identified the challenges and opportunities that both tourists and travel providers face in this market.

Regarding the current state of relationships between Italy and China, the ongoing positive diplomatic ties between the countries made possible for the “2022 year of culture and tourism”, that was originally planned for 2020, to not be abandoned as an important initiative that symbolically unites the two cultures. This concept of symbolic unity is furtherly exploited by the Belt and Road Initiative, which because of Covid couldn’t develop the intended projects during the years after the signing of the MoU with Italy, but still retained its message of connection between the countries, united also from the historical Silk Road. Seeing that the recent history of Chinese outbound tourism have been speckled with positive reinforcements given by the relationship of Italy and China, it’s no surprise that the growth of Chinese tourism influxes has been steadily increasing before the pandemic-induced stop. The situation can still improve tough, and it is important that Italy puts effort into re-establishing these tourism influxes by easing the process of getting a visa and further strengthening the consular work in China.

An analysis of the impact of COVID-19 is unavoidable seeing the effect that it had on the global tourism market, and particularly for Chinese Outbound tourism, which because of the extended travel bans is one of the latest to recover. Aside from examining the recovery path of the tourism

industry, providing some insight on the rebuilding of travel sentiment among Chinese citizens was also necessary to understand when we can expect them to resume long-haul outbound travel, which will return to pre-pandemic levels later than short-haul due to lingering concerns and price increases. The latest observations (one month after the reopening of China on the 8<sup>th</sup> of January 2023) have shown how the travel sentiment had a massive increase, driving an immediate increment in the number of bookings. This positive trend has given confidence to the entire industry, making the future of Chinese Outbound tourism hopeful.

While these chapters provided a background of the current state of the industry, the more practical approach of the following ones has shown how, by studying the new trends in the Chinese tourism industry, it can be deduced that China's outbound tourist market has significant potential that remains untapped. The travel industry has the chance to broaden its product offerings through activities like offering personalized and immersive experiences and adapting to evolving customer demands. In addition, tourism marketing strategies can incorporate knowledge gained from the evolving experiences of the domestic market during the pandemic, defining a possible future for Chinese tourism in Italy. This research has found how, in recent years, Chinese tourism has become a sustainable and responsible trend, with educated individuals who have a desire to engage with authentic Italian culture and act as its ambassadors in China. This implies that the new Chinese tourist views their trip to Italy as an experience that enriches their life, making them more receptive to alternative travel options that do not harm Italy's artistic and cultural heritage, but instead, enhance and promote it. These new tourists will look for different destinations in Italy other than the more popular cities like Rome, Venice and Florence, appreciating also outdoor experiences and having longer stays, prioritizing experience. To attract and retain Chinese tourists, it's essential to have well-designed initiatives that are put into action, sustained by both private and public sectors and supported by relevant government institutions. Creativity in developing new tools and methods, utilizing technology, is crucial, and communication between Italian and Chinese tourism structures and institutions is vital for building lasting relationships. By following these methods, a sense of acceptance and loyalty can be fostered among Chinese tourists coming to Italy.

As this research has found, the Chinese outbound travel market is not homogenous, it is segmented, with experienced independent travelers, including millennials, Gen-Z, and luxury travelers, expected to be the first wave of long-haul travelers in 2023. To attract these segments



of travelers, destinations and brands need to take a fresh approach that speaks to the Chinese tourist who has spent three years away from the world. They need to understand their diverse needs, communicate on safety, and offer value-packed experiences. Companies in the travel agency and travel retail industries need to consolidate and provide unique and customized services to attract high-end travelers. Additionally, innovation is key to the development of China's tourism products, and new payment options, improvements in the flow of funds among tourism market players, and the launch of high-tech solutions have changed the way the travel sector does business. The deepening of the integration between the internet and tourism has become the driving force for tourism development in China, and the Italian tourism and hospitality industry should follow soon, embracing the innovation.

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## TABLES AND ANNEXES

*Table 1. Approved Destination Status (ADS) Agreements by year*

Year	Recipient	Number of ADS
1983	Hong Kong, Macau	2
1988	Thailand	3
1990	Malaysia, Singapore	5
1992	Philippines	6
1998	South Korea	7
1999	Australia, New Zealand	9
2000	Brunei, Cambodia, Japan, Myanmar, Vietnam	14
2002	Egypt, Indonesia, Malta, Nepal, Turkey	19
2003	Croatia, Cuba, Germany, Hungary, India, Maldives, Pakistan, South Africa, Sri Lanka	28
2004	Austria, Belgium, Cyprus, Czech Republic, Denmark, Estonia, Ethiopia, Finland, France, Greece, Iceland, Ireland, Italy, Jordan, Kenya, Latvia, Liechtenstein, Lithuania, Luxembourg, Mauritius, Netherlands, Norway, Poland, Portugal, Romania, Seychelles, Slovakia, Slovenia, Spain, Sweden, Switzerland, Tanzania, Tunisia, Zambia, Zimbabwe	63
2005	Antigua and Barbuda, Barbados, Brazil, Chile, Fiji, Jamaica, Lao PDR, Lesotho (B), Mexico, Northern Mariana Islands, Peru, Russia, United Kingdom, and Vanuatu	77
2006	Algeria (B), Bahamas, Benin (B), Botswana (B), Cameroon (B), Gabon (B), Grenada, Madagascar (B), Mongolia, Mozambique (B), Nigeria (B), Rwanda (B), Saint Lucia (B), Tonga, Uruguay (B)	92

<b>2007</b>	Andorra, Argentina, Bangladesh, Bulgaria, Monaco, Morocco, Namibia, Oman, Syria, Trinidad and Tobago (B), Uganda, United States, and Venezuela	105
<b>2008</b>	Costa Rica (B), Federated States of Micronesia (B), French Polynesia, Israel, Lebanon (B), and Taiwan	111
<b>2009</b>	Cape Verde, Dominica, Ecuador, Ghana, Guyana, Mali, Montenegro, Papua New Guinea, and United Arab Emirates	120

**Sources and Notes:** China National Tourism Administration (2009) and a list from Professor Zélia Breda. The list covers ADS agreements thru September 2009. The CNTA and Breda lists are the same through 2004. The Breda list has more ADS countries (120) than the CNTA list (104), and the additional countries on the former appear to involve countries that signed a Memorandum of Understanding with China for ADS but have not made the agreements operational.

Table 2. Chinese tourists' arrivals and overnight stays in Italy by year

**Sources and Notes:** Data from Istat (Italian National Statistical Institute) database, yearly tourists' arrivals and stays in accommodation facilities filtered by country of origin, in this case China.

	Type of accommodation facility	Indicator	Number of tourists from China
<b>2005</b>	Total number of accommodation facilities	arrivals	724 444
		overnight stays	1 219 151
	Hotel establishments	arrivals	707 196
		overnight stays	1 128 318
	Other accommodation establishments	arrivals	17 338
		overnight stays	90 833
<b>2006</b>	Total number of accommodation facilities	arrivals	816 940
		overnight stays	1 325 467
	Hotel establishments	arrivals	79 541
		overnight stays	1 233 958
	Other accommodation establishments	arrivals	22 399
		overnight stays	91 509
<b>2007</b>	Total number of accommodation facilities	arrivals	806 129
		overnight stays	1 314 727
	Hotel establishments	arrivals	775 013
		overnight stays	1 196 057
	Other accommodation establishments	arrivals	31 116
		overnight stays	118 670
<b>2008</b>	Total number of accommodation facilities	arrivals	716 545
		overnight stays	1 221 174
	Hotel establishments	arrivals	686 391
		overnight stays	1 101 656
	Other accommodation establishments	arrivals	30 154
		overnight stays	119 518
<b>2009</b>	Total number of accommodation facilities	arrivals	727 570
		overnight stays	1 254 039
	Hotel establishments	arrivals	696 778
		overnight stays	1 120 082
	Other accommodation establishments	arrivals	30 792
		overnight stays	133 957

<b>2010</b>	Total number of accommodation facilities	arrivals	965 857
		overnight stays	1 564 035
	Hotel establishments	arrivals	929 308
		overnight stays	1 404 270
	Other accommodation establishments	arrivals	36 549
		overnight stays	159 765
<b>2011</b>	Total number of accommodation facilities	arrivals	1 342 518
		overnight stays	2 089 115
	Hotel establishments	arrivals	1 291 762
		overnight stays	1 895 228
	Other accommodation establishments	arrivals	50 756
		overnight stays	193 887
<b>2012</b>	Total number of accommodation facilities	arrivals	1 583 479
		overnight stays	2 496 287
	Hotel establishments	arrivals	1 516 406
		overnight stays	2 265 575
	Other accommodation establishments	arrivals	67 073
		overnight stays	230 712
<b>2013</b>	Total number of accommodation facilities	arrivals	1 850 206
		overnight stays	2 829 861
	Hotel establishments	arrivals	1 760 320
		overnight stays	2 536 935
	Other accommodation establishments	arrivals	89 886
		overnight stays	292 926
<b>2014</b>	Total number of accommodation facilities	arrivals	2 297 699
		overnight stays	3 481 280
	Hotel establishments	arrivals	2 180 295
		overnight stays	3 133 825
	Other accommodation establishments	arrivals	117 404
		overnight stays	347 455
<b>2015</b>	Total number of accommodation facilities	arrivals	3 338 155
		overnight stays	5 378 530
	Hotel establishments	arrivals	3 152 811
		overnight stays	4 859 805
	Other accommodation establishments	arrivals	185 344
		overnight stays	518 725

<b>2016</b>	Total number of accommodation facilities	arrivals	2 678 626
		overnight stays	4 472 992
	Hotel establishments	arrivals	2 506 806
		overnight stays	3 921 942
	Other accommodation establishments	arrivals	171 820
		overnight stays	551 050
<b>2017</b>	Total number of accommodation facilities	arrivals	3 077 279
		overnight stays	5 027 945
	Hotel establishments	arrivals	2 871 289
		overnight stays	4 428 542
	Other accommodation establishments	arrivals	205 990
		overnight stays	599 403
<b>2018</b>	Total number of accommodation facilities	arrivals	3 220 847
		overnight stays	5 287 714
	Hotel establishments	arrivals	2 974 006
		overnight stays	4 611 477
	Other accommodation establishments	arrivals	226 841
		overnight stays	676 237
<b>2019</b>	Total number of accommodation facilities	arrivals	3 167 960
		overnight stays	5 355 907
	Hotel establishments	arrivals	2 911 356
		overnight stays	4 619 555
	Other accommodation establishments	arrivals	256 604
		overnight stays	737 352
<b>2020</b>	Total number of accommodation facilities	arrivals	264 993
		overnight stays	608 094
	Hotel establishments	arrivals	232 454
		overnight stays	449 090
	Other accommodation establishments	arrivals	32 539
		overnight stays	159 004
<b>2021</b>	Total number of accommodation facilities	arrivals	204 874
		overnight stays	396 259
	Hotel establishments	arrivals	183 039
		overnight stays	293013
	Other accommodation establishments	arrivals	21 835
		overnight stays	103 246

Source: <http://dati.istat.it/#>, data collected on January 2023.

## *Annex 1. Chinese most popular social media platforms*

The most popular social media platforms in China are:

### **WeChat**

WeChat was launched in 2011 by Tencent, a Chinese tech giant, as a messaging platform, and has since become one of the most widely used social media apps in China with over a billion monthly active users. In western terms, we can resume Wechat as a mix of WhatsApp, Google, Facebook and Apple Pay. WeChat is the most popular platform used in China due to many features of the app, in fact, users can do almost everything they need, including voice calling, text messaging, online payment services, play games and many more features, all without ever leaving the app. One of WeChat's most popular features is "Moments," which is essentially a social networking feature that allows users to share photos and posts with their friends and followers. WeChat also has "Official Accounts," which are accounts run by businesses, organizations, and public figures that allow them to interact with their followers and provide news, information, and services. WeChat Pay is another popular feature, which is a mobile payment service that enables users to make payments and transfer money to other WeChat users. The app also offers "Mini Programs," which are lightweight apps that can be accessed within WeChat and provide various services, such as ordering food, booking a taxi, and playing games. In addition to these features, WeChat also allows users to make voice and video calls with their friends and family, and is known for its strong security and privacy features, including end-to-end encryption for messages and the ability to control who can see your Moments posts. Overall, WeChat is a versatile and one of the most widely used social media platform in China that offers a wide range of features and services to its users, making it an essential part of daily life for many Chinese people.

### **Weibo**

Weibo is a microblogging platform launched in 2009 by another big tech company in China, Sina Corporation, and it is usually compared to Twitter, as their concept and newsfeed interface are similar. Weibo allows users to post short messages with a maximum of 2 thousand words, photos, and videos, and it is often used for sharing news, entertainment, and personal updates, becoming a major platform for social activism and public opinion. Weibo also offers other features that help to make it a comprehensive social media platform. For example, it has "Official Accounts," which allow businesses, organizations, and public figures to interact with their followers and provide news, information, and services. Weibo also has a "Weibo Wallet" feature that allows users to make mobile payments and transfer money to other Weibo users. Another popular feature of Weibo is "Weibo Stories." Similar to Instagram and Snapchat, Weibo Stories allows users to share photos and videos that disappear after 24 hours. This feature has proven to be especially popular among younger users who enjoy sharing their daily lives with friends and followers. Overall, Weibo is a popular and influential

social media platform in China that offers a wide range of features and services. It allows users to connect with each other, share information and ideas, and stay up to date with the latest news and trends. Weibo isn't as popular as WeChat with over 500 million registered users, while WeChat has more than 1 billion monthly active users. However, both platforms are important in the Chinese digital landscape, and many users use both WeChat and Weibo for different purposes.

### **Douyin**

Douyin is a popular short-video social media platform in China, also known as TikTok in other parts of the world. Launched in September 2016 by the tech company ByteDance, Douyin reached a 100 million user base in its first year of existence. The favorite features of users in China are creating short videos (lip-synch, comedy, viral challenges) and live streaming. It has the same interface as the western counterpart TikTok, with a "For You" page, which showcases a personalized feed of videos for each user. This feature helps users discover new content and creators, and has been a major factor in the app's success. Douyin's algorithm also ensures that the content users see is relevant and interesting to them based on their viewing history. Its popularity has made it an important platform for businesses and marketers to reach younger audiences in China. The platform has various advertising options that allow brands to target specific demographics and reach a large audience.

### **Kuaishou**

Kuaishou, internationally known as Kwai, is a social media platform that is popular in China and other parts of Asia. It was created in 2011 by the Chinese tech company Kuaishou Technology and has since become one of the largest short-form video and livestreaming apps in the world, with over 300 million daily active users, and currently competing with Douyin. This app allows users to create and share short videos that are typically 15 to 60 seconds in length. These videos can be edited with filters, music, and other effects to create engaging and entertaining content, with the focus on content created by ordinary people. Many of the most popular videos on the platform feature users sharing their daily lives, hobbies, and talents. This has led to the platform being seen as more authentic and relatable compared to some other social media platforms. Kuaishou also has a strong focus on livestreaming. The platform allows users to stream live video to their followers, providing a way to interact with fans and share real-time experiences. This has made the app popular with influencers, who use the platform to build their fan base and engage with followers. The platform also has a "Kuaishou Shop" feature that allows users to purchase products directly from livestreams or short videos. Kuaishou has become an important platform for businesses and marketers to reach audiences in China. The app offers various advertising options that allow brands to target specific demographics and reach a large audience.



### **Xiaohongshu (Red, or Little Red Book)**

Xiaohongshu, also known as "Little Red Book" or "RED" in English, is a social media and e-commerce platform that was founded in China in 2013. The platform combines social media, content creation, and online shopping, making it a popular destination for Chinese consumers, and it is often compared with the western social media Instagram. One of the unique aspects of Xiaohongshu is its focus on lifestyle content. The platform is a hub for beauty, fashion, travel, and other lifestyle topics, with users creating and sharing content about their experiences and recommendations. This has made the platform a popular destination for younger generations in China who are interested in exploring new products and experiences. It also has a strong e-commerce component, allowing users to purchase products directly from the platform. This has made it an important destination for businesses and marketers looking to reach younger Chinese consumers. The platform offers a range of advertising and marketing options, allowing brands to target specific demographics and reach a large audience. Users can follow and interact with each other, creating a community around shared interests and experiences. This has made the platform a valuable tool for influencers and content creators looking to build their fan base and engage with followers. Xiaohongshu has become one of the fastest-growing social media platforms in China, with over 300 million registered users as of 2021. The platform's unique combination of content creation, online shopping, and social networking has made it a popular and important destination for businesses and consumers alike.

