



High-level Meeting on Chinese Outbound Tourism to Africa

Addis Ababa, Ethiopia
20 April 2017

John G.C. Kester
Director Tourism Market Trends Programme

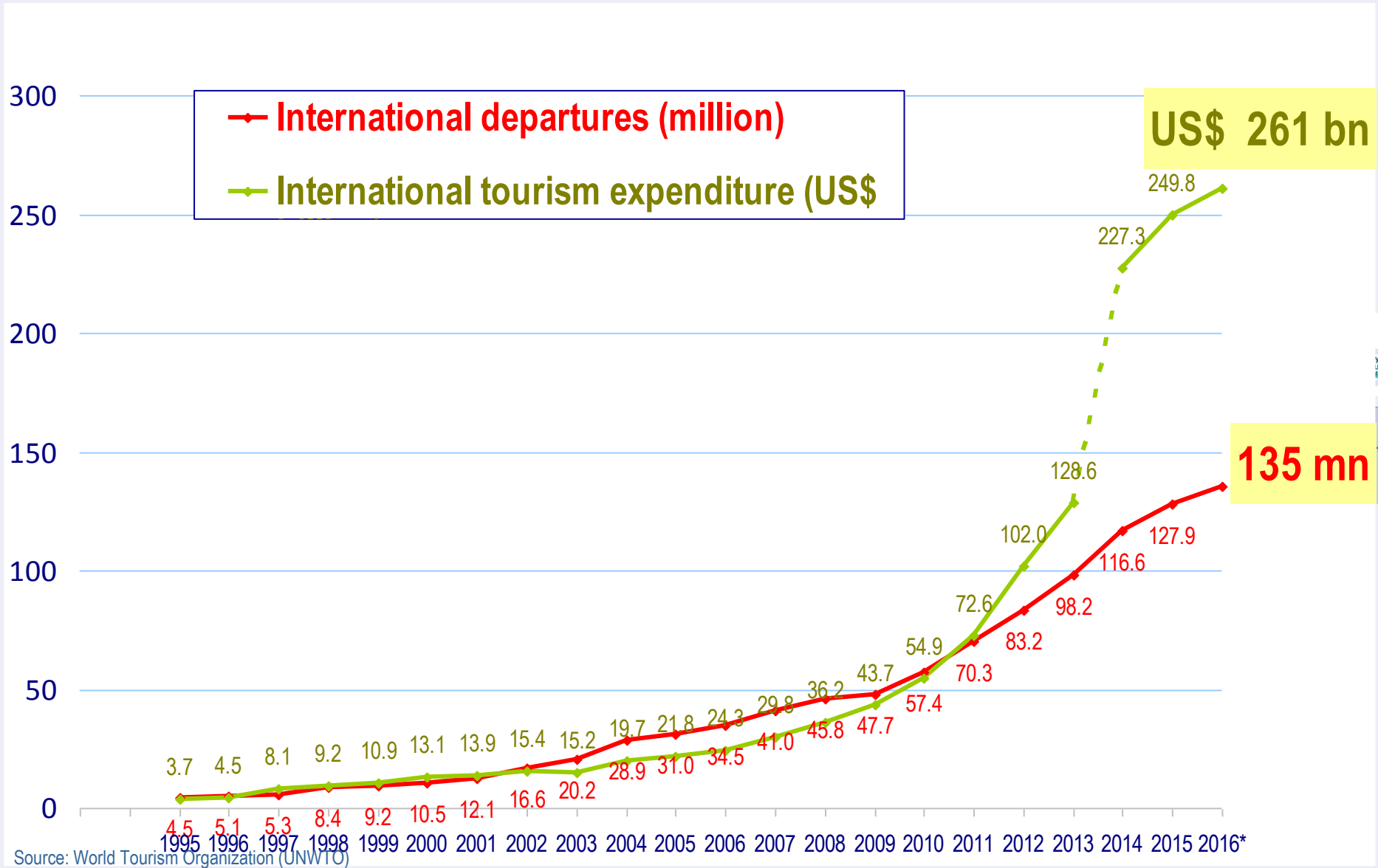


A close-up photograph of a hand placing a piece of injera (a traditional Ethiopian flatbread) onto a plate of food. The plate contains various dishes, including a meat and vegetable stew, a salad of shredded meat and vegetables, and a piece of injera. The background is blurred, showing more food and a person's face.

Overview

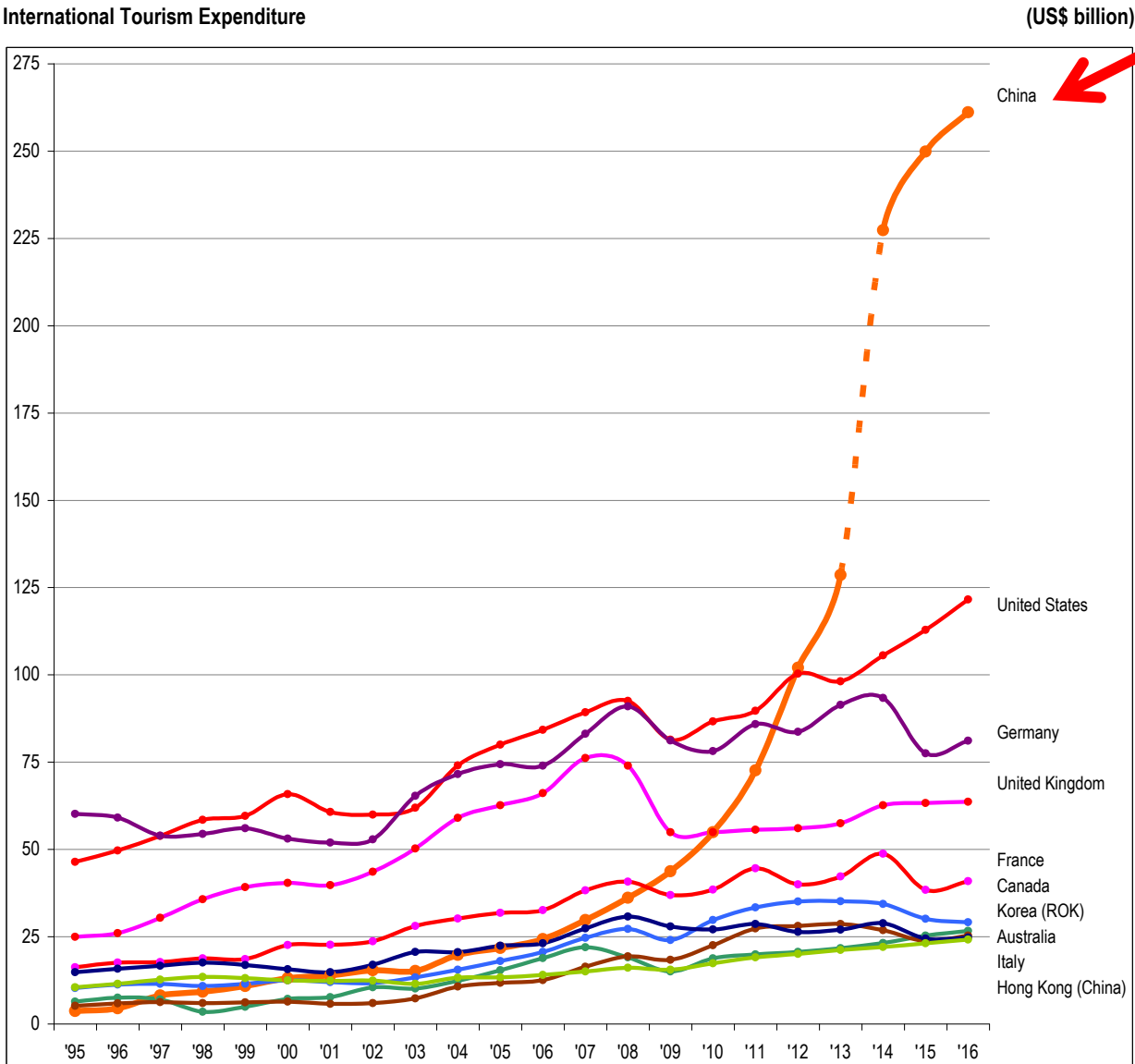
- The rise of China
- Chinese outbound tourism to Africa
- Know your customer
- How to prepare

Outbound tourism from China



China became number 1 outbound market in 2012 and strong growth continues

Outbound Tourism Top 10 Spenders
International Tourism Expenditure



Source: World Tourism Organization (UNWTO) ©



The Chinese Outbound Travel Market

2012 Update



YEAR
JOURN
MENT



Understanding Chinese Outbound Tourism

What the Chinese blogosphere is saying about Europe

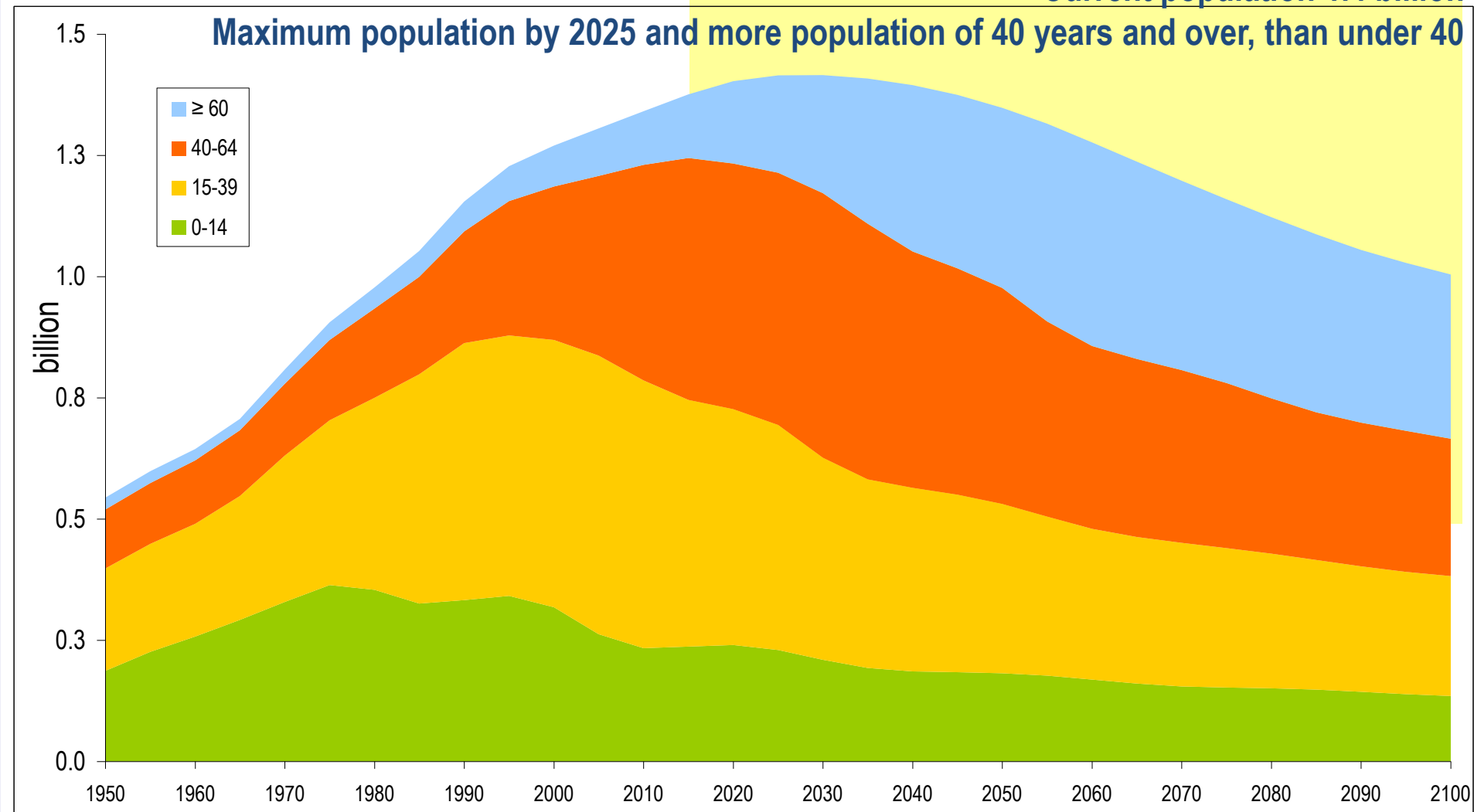


China population

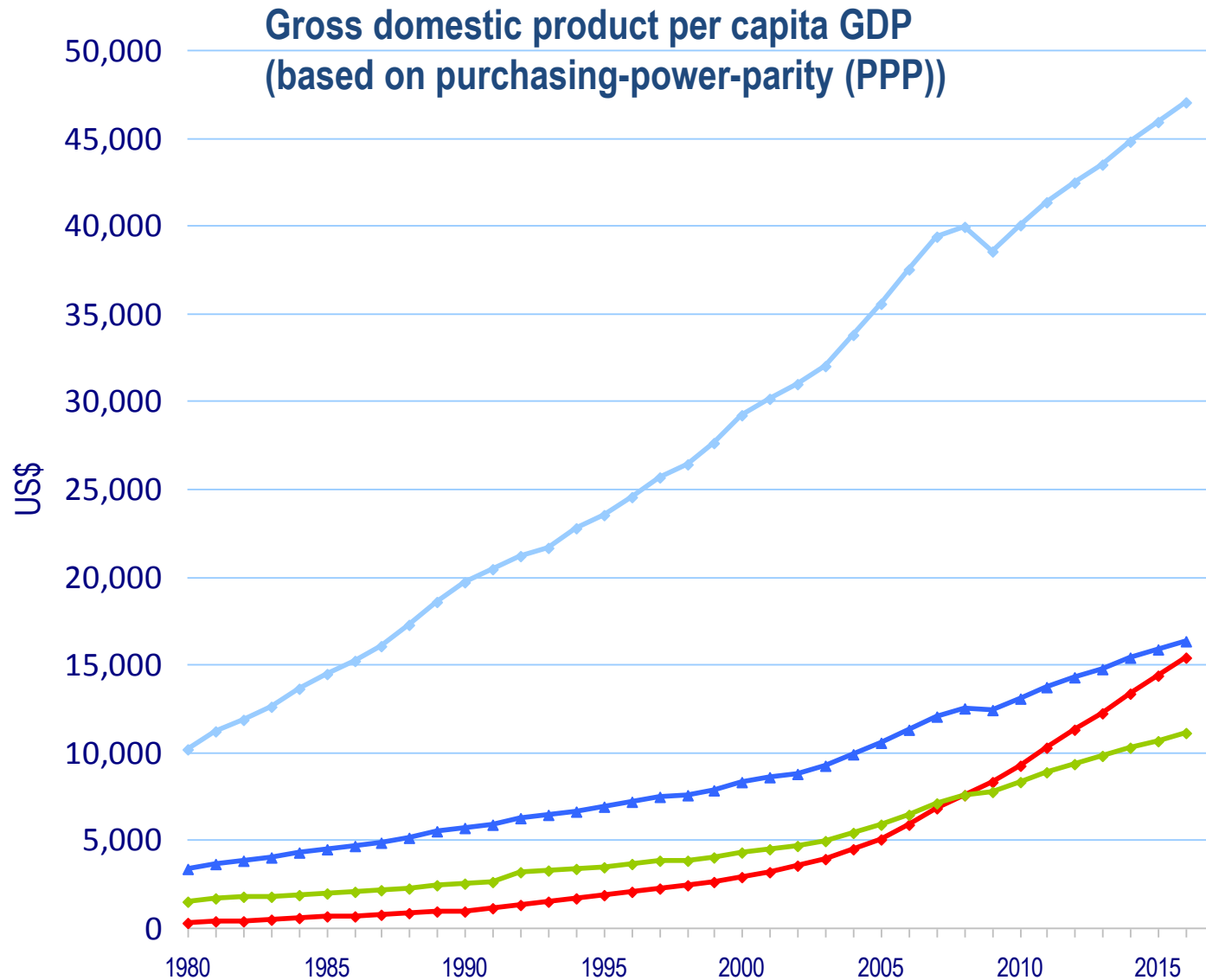
China: population by age group, 1950-2100

Current population 1.4 billion

Maximum population by 2025 and more population of 40 years and over, than under 40



Growing prosperity



Advanced
economies



World average

China

Emerging economies

Growing prosperity

China share in the world

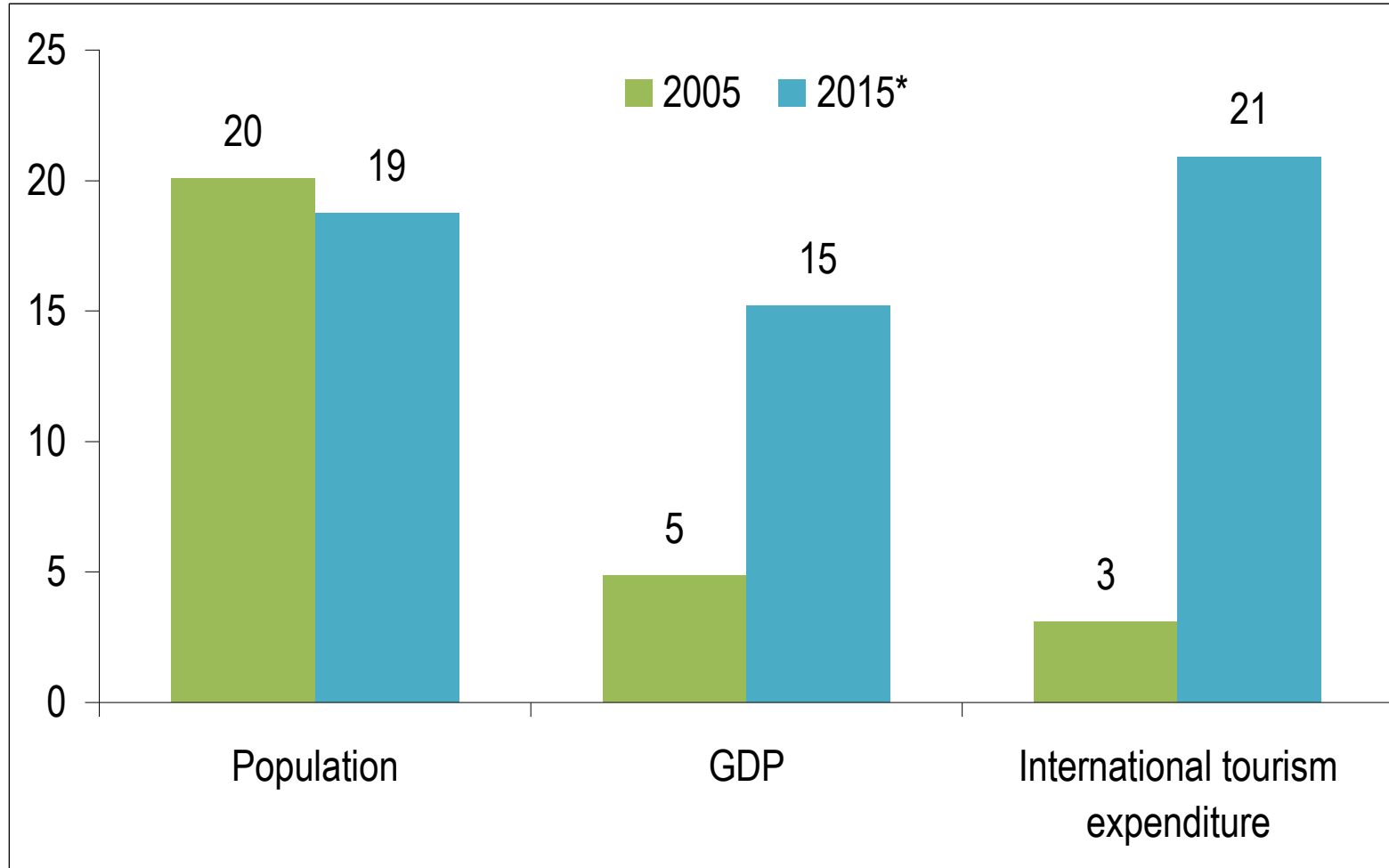
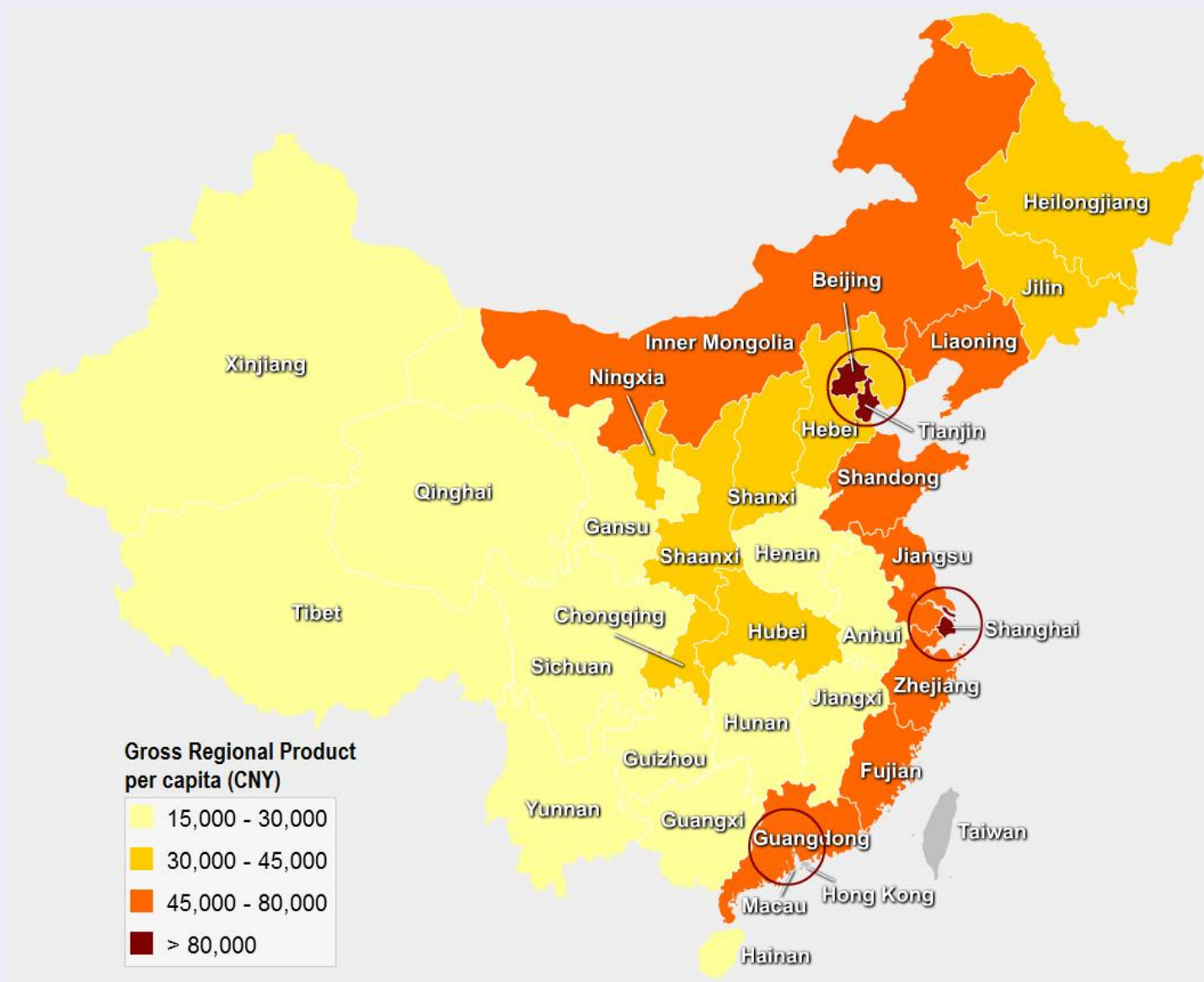


Figure 2.3 Chinese Provinces, Autonomous regions and Municipalities by Gross Regional Product per capita (CNY), 2011



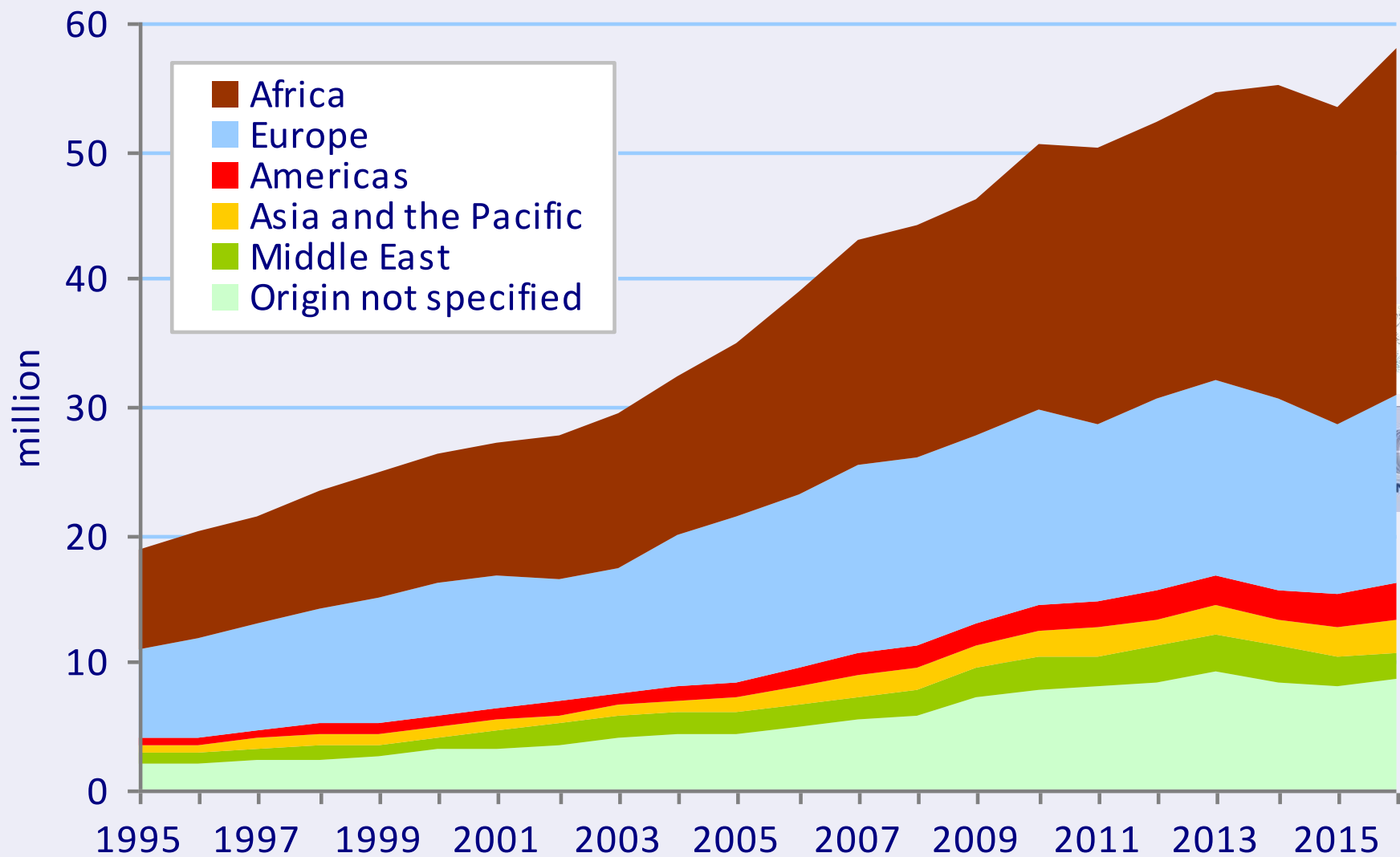
Source: UNWTO, compiled from National Bureau of Statistics of China

Disclaimer: The maps elaborated by UNWTO are for reference only and do not imply any judgment on the legal status of any territory, or any endorsement or acceptance of such boundaries.

A family of four (two adults and two children) are sitting in a wooden boat on a body of water, waving their hands. They are surrounded by tall, steep, rocky cliffs covered in lush green vegetation. The water is a vibrant green color. The sky is clear and blue. The family is smiling and appears to be enjoying their trip.

**Chinese outbound
to Africa**

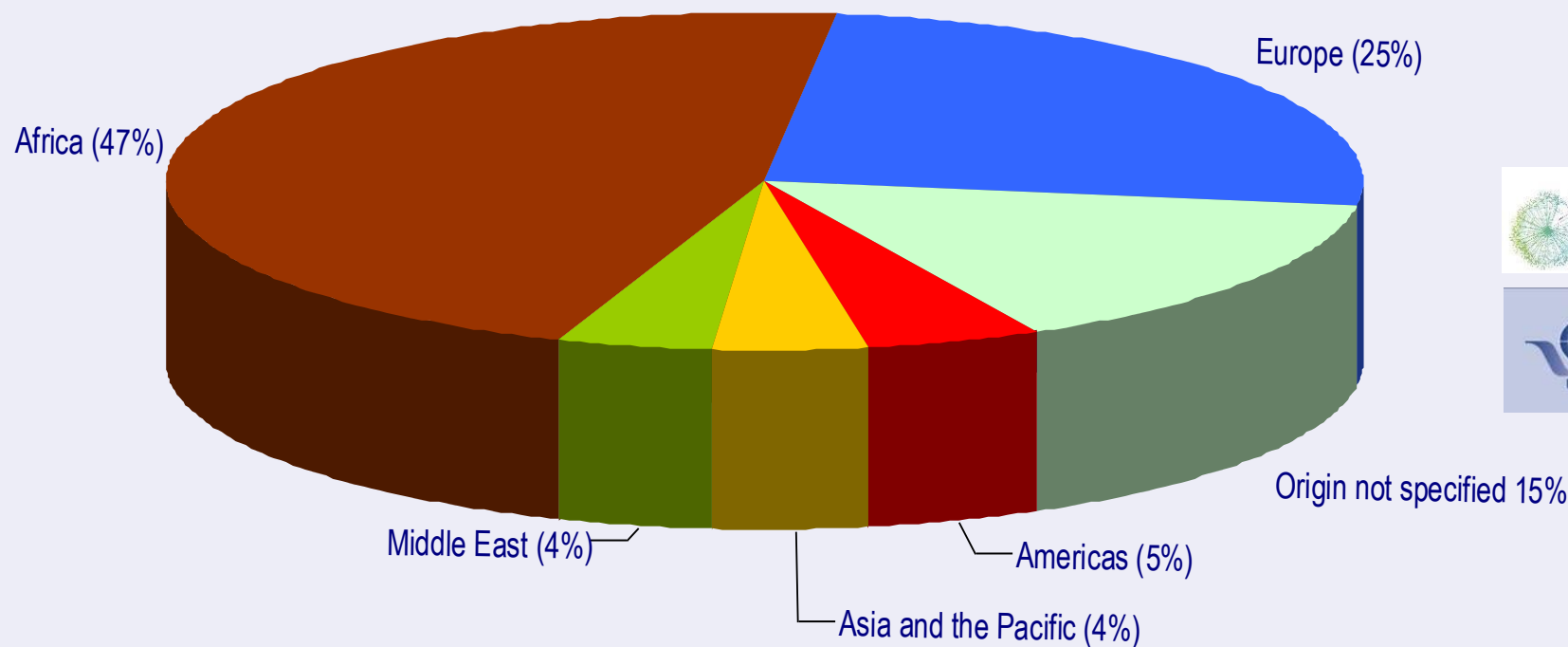
International tourist arrivals to Africa by region of origin



2017
INTERNATIONAL YEAR
OF SUSTAINABLE TOURISM
FOR DEVELOPMENT



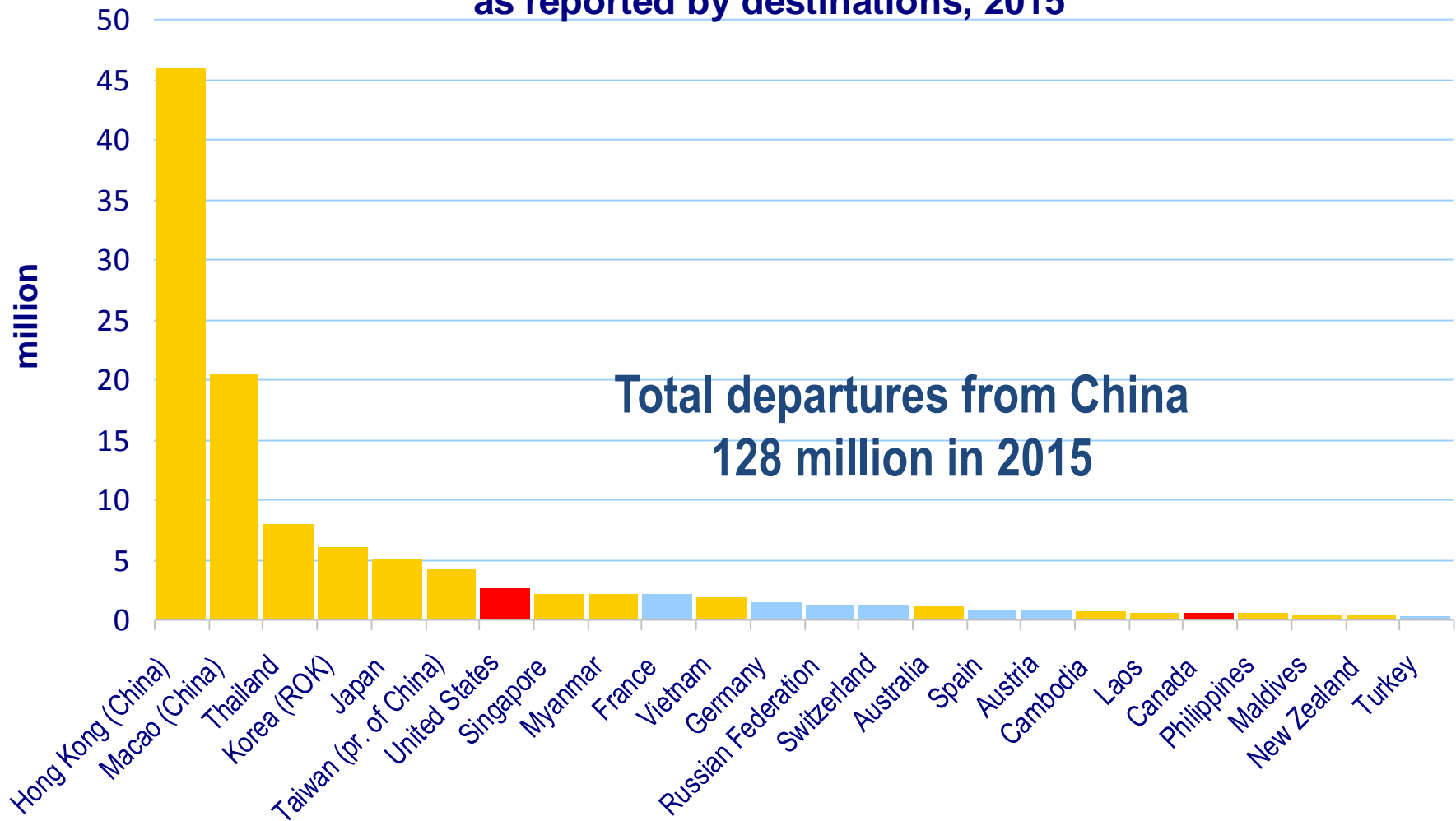
International tourist arrivals to Africa by region of origin, 2015



**Total arrivals from Asia and the Pacific
2.3 million in 2015**

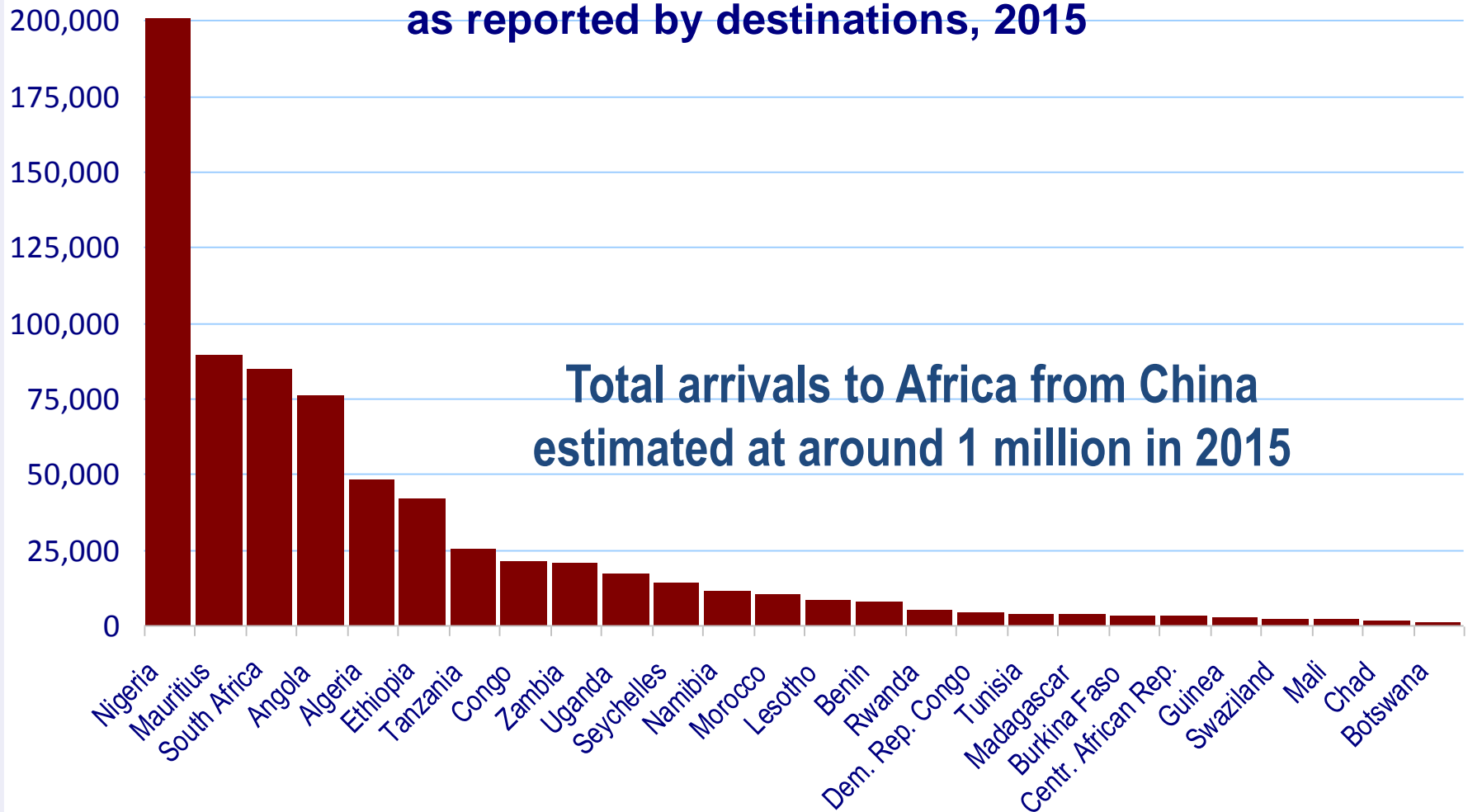
Where do Chinese travel

International tourist arrivals from China
as reported by destinations, 2015



Where do Chinese travel

**International tourist arrivals from China
as reported by destinations, 2015**

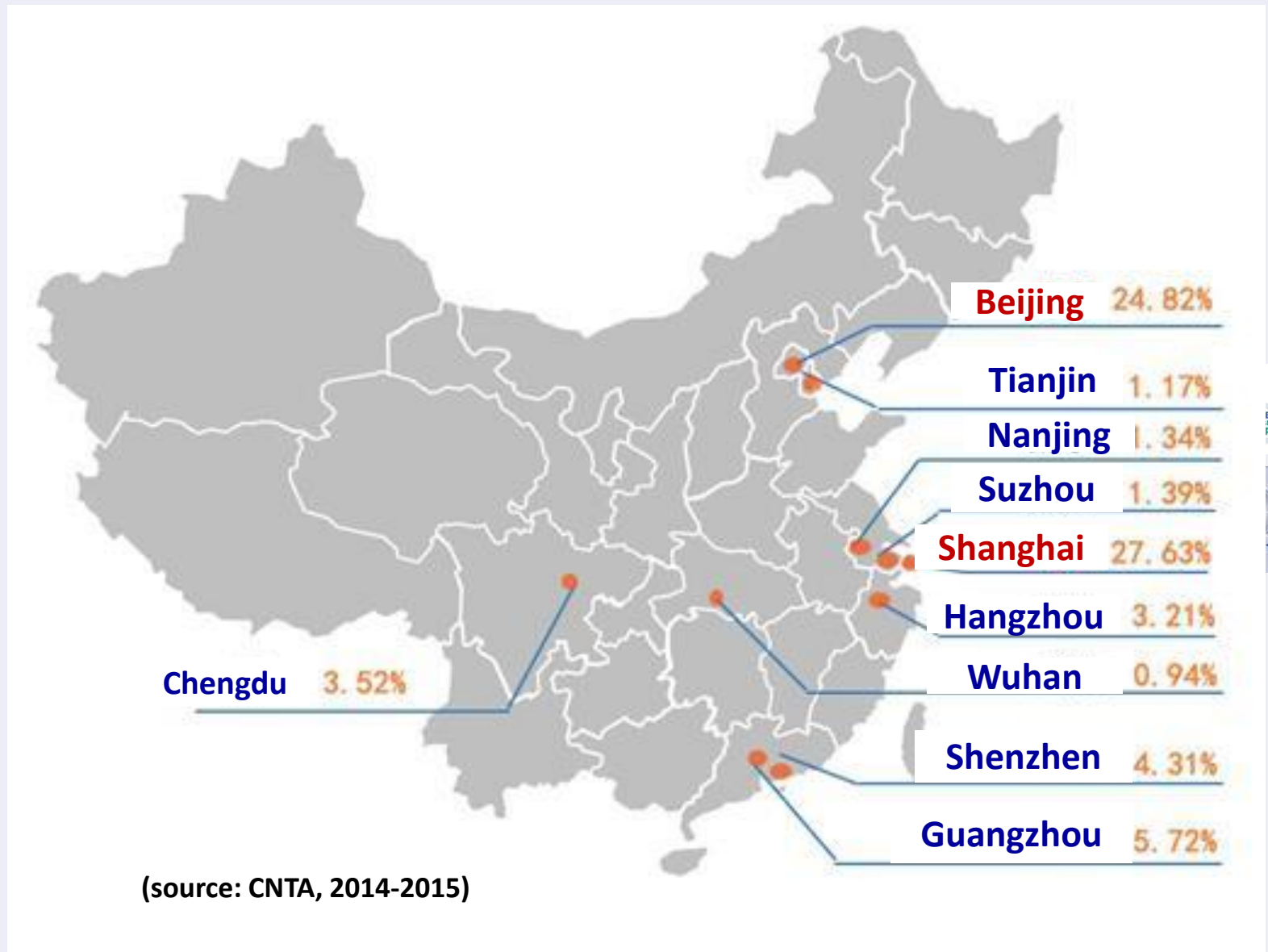


**Total arrivals to Africa from China
estimated at around 1 million in 2015**



**Know your
customer**

Where are Chinese tourists from?



Where are Chinese tourists from?

**First-tier cities and eastern China are steady outbound tourist sources.
Second-tier cities and south-western China show great potential.**

%	Source province/city of Chinese outbound tourists
>65%	Beijing, Shanghai, Guangdong
8%-12%	Jiangsu, Zhejiang, Tianjin
5%-10%	Liaoning, Shandong, Hubei, Sichuan, Chongqing
3%-5%	Heilongjiang, Hebei, Shanxi, Henan, Anhui, Hunan, Fujian, Guangxi
3%	Jilin, Inner Mongolia, Ningxia, Qinghai, Xinjiang, Tibet, Gansu, Yunnan, Guizhou, Jiangxi, Hainan



Where are Chinese tourists from?

Outbound travel tendency in first-tier cities

Sample city	Outbound travel tendency
Beijing	Increasing family and MICE tourists Leisure holidays in short-haul destinations Sightseeing trips in long-haul destinations
Shanghai	Expanding demand in high-end products Decreasing demand in low-end products Increasing family and MICE tourists
Guangzhou	Expanding demand in long-haul destinations



Where are Chinese tourists from?

Outbound travel tendency in second-tier cities

Sample city	Outbound travel tendency
Hangzhou Qingdao Nanking Chengdu Suzhou Wuhan Chongqing	Traveling for showing-off Shopping with lower taxation More convenient foreign destinations Strong consumption power Expanding demand in emerging destinations



Who are the Chinese tourists?

Chinese citizens born in late 1940s and early 1950s, already retired

- Time, Money and desire to travel

Over 60% outbound travellers are young people

- “Ba Ling Hou” (travelers born in the 80s) take up 54% of China’s outbound tourist market.
- “Jiu Ling Hou” (travelers born in the 90s) take up 11% of China’s outbound tourist market.



They have higher education

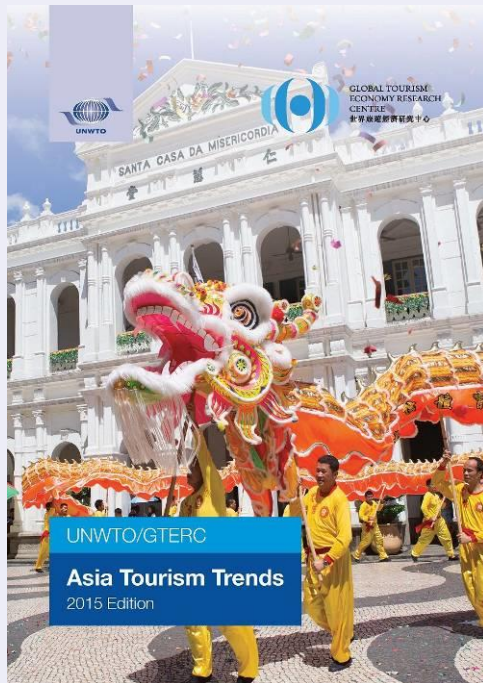
Over 70% of Chinese outbound tourists are graduated from colleges or universities.



(Source: China Tourism Academy, 2014 China Outbound Tourism Report)

Rise of the consumer class

- Disposable income
- Urban
- Connected
- Generally young



How do Chinese travel?

Over **70%** of Chinese outbound tourists tend to travel with friends or family.

Most Chinese outbound tourists choose destinations based on:

- Good experiences of **friends, family and colleagues**
- Information available on the internet
- Recommendations and brochures from travel agencies



7
AL YEAR
ETOURISM
OPMENT

UNWTO

(Source: China Tourism Academy, 2014
China Outbound Tourism Report .
Analysis based industry researches.)

How do Chinese travel?

- Over **60%** of Chinese outbound tourists travel abroad more than once a year.
- Over **70%** of Chinese outbound tourists travel by themselves.
- About **25%** of Chinese outbound tourists travel in groups organized by agencies.



(Source: China Tourism Academy, *2014 China Outbound Tourism Report*)



MEET CHINA'S NEW WAVE OF INDEPENDENT TRAVELERS

SOPHISTICATED, SELF-RELIANT & SPONTANEOUS

OF WANDERLUST AND (BIG) WALLETS

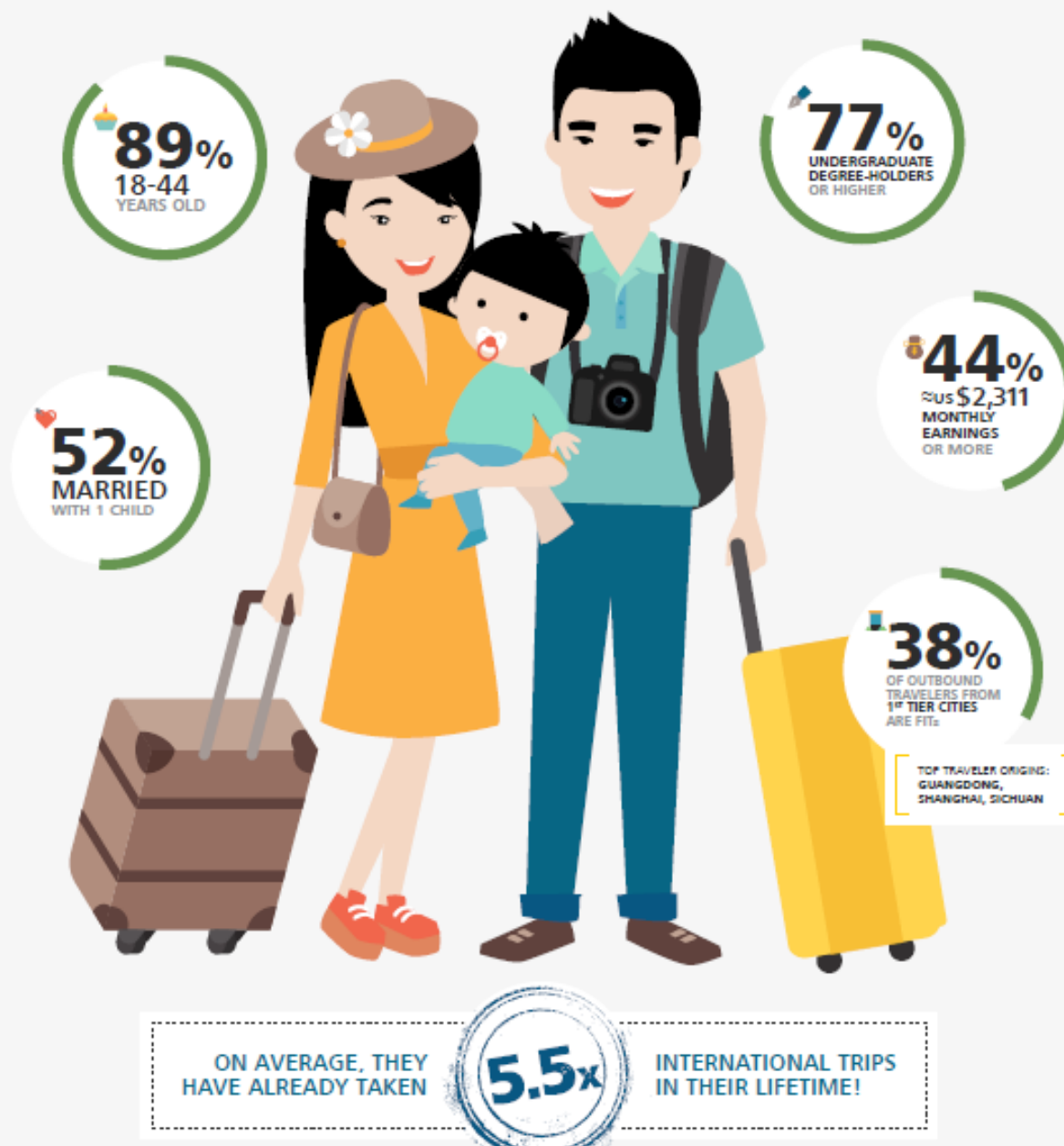
A new breed of Chinese travelers is starting to emerge –
Dubbed the **Free Independent Travelers (FITs)**, these individuals are craving
the adventure away from group tours, with their wallets ever at the ready!

20% INCREASE
IN OUTBOUND
LEISURE TRIPS
YEAR-ON-YEAR

≈US **\$205.7**
BILLION

TOTAL TRAVEL
EXPENDITURE

WHO ARE CHINA'S FITs?



THEY ARE INDEPENDENT AND IMPULSIVE

CREATING CUSTOMIZED ITINERARIES

9/10

BUY SEPARATE
TRAVEL COMPONENTS



TRAVELING SPONTANEOUSLY

32%

CHOOSE DESTINATIONS
1-2 WEEKS BEFOREHAND



77%

PREFER TRAVELING
BETWEEN MAY
AND OCTOBER

TAKING LONGER TRIPS

40%

STAY 4 - 6
NIGHTS ABROAD

7 NIGHTS OR MORE
FOR 1/3 TRIPS TAKEN DURING
THE NATIONAL DAY HOLIDAY*



FLYING SHORTER DISTANCES

91%

PREFER SHORT-HAUL
DESTINATIONS



TOP 10 TRAVEL HOTSPOTS:

JAPAN, THAILAND, SOUTH KOREA, UNITED STATES, MALAYSIA,
SINGAPORE, FRANCE, UNITED KINGDOM, ITALY, CANADA



TRAVEL ASPIRATIONS & MOTIVATIONS

56%

REST &
RELAXATION



47%

NATURE,
CULTURE &
HISTORY



42%

SHOPPING



DESTINATION CRITERIA

SAFE AND POLITICALLY STABLE

65%

CLEAN WITH LOW POLLUTION

36%

NATURAL FEATURES AND LANDSCAPES

35%

HOLIDAY INDULGENCES

AVERAGE SPEND PER TRIP
≈US **\$2,729**



ACCOMMODATION
≈US **\$473**

AIRLINE TICKETS
≈US **\$691**

SHOPPING
≈US **\$1,054**

FOR TRIPS TO THE U.S. AND CANADA,
THE AVERAGE SHOPPING SPEND
CAN REACH ≈US\$2,707!

A BRIGHTER FUTURE BECKONS

In the next 2 years, nearly half of outbound Chinese FITs plan to take more trips

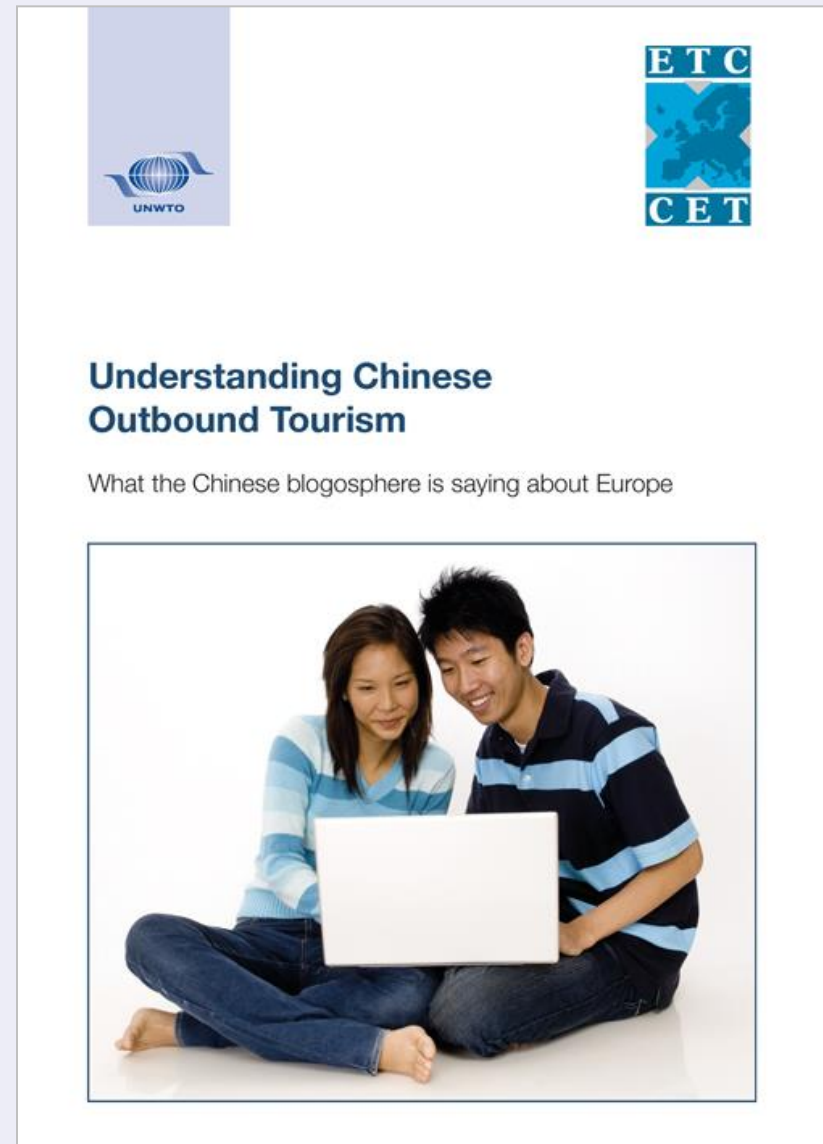
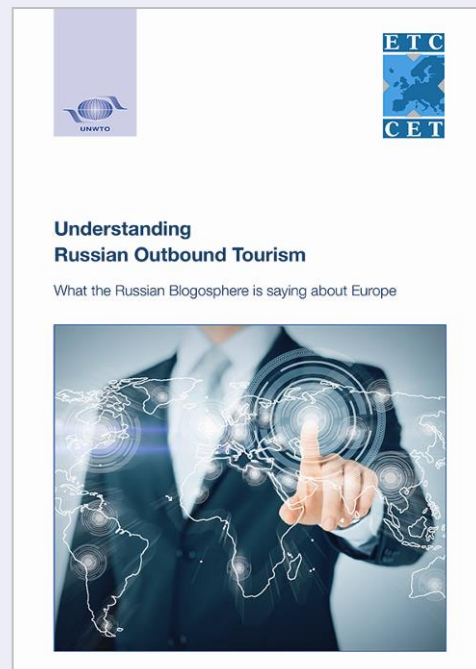
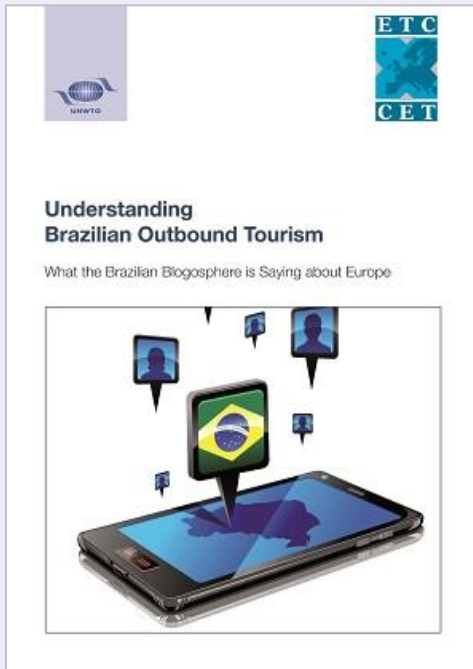
52% for a
LONGER
period

54% with a
BIGGER
budget



Understanding Chinese outbound tourism

Outbound market 'netnographic' studies based on the analysis of the blogosphere



Major themes

- Yearning for simplicity and authenticity
- Increasing demand for in-depth travel
- Shopping and luxury
- Remaining price sensitive
- High potential in lower-tier cities
- Honeymoon boom
- Travel goes mobile
- Fringe phenomena spreading to the mainstream
- The visa hurdle



Yearning for simplicity and authenticity

The ideal destination is one with few people. If you want to talk, you talk. If you want silence, you keep silent

*Forget about Paris and London!
The small towns in Europe are
so much more beautiful than
the big cities. But most travel
agencies won't take tourists
there, we can only go on our
own.*



Blue skies – an underestimated advantage

Take a picture in any direction and it will show a beautiful landscape. Look anywhere and you will see a sky bluer than what you've ever seen in Beijing.

Honeymoon travel



The tenth wedding anniversary is a very special day, so I asked my wife where she would like to go for a make-up honeymoon.

I and my beloved wife travelled to amazing Greece. We experienced the sweetness and romance of the myriad Greek islands, embraced the serendipitous blue sky at the Aegean Sea, kissed in front of temple ruins, and felt the warm breeze on a passionate boat trip. We will forever live happily together.

Courtesy of Chai Ran and Huang Yanfang.

Wedding photo travel



Courtesy of Chai Ran and Amina Xu.

My plan is to travel to Hungary, Austria and Italy next year. I will have a wedding veil made and bring it with me to take photos.



亚的斯亚贝巴景点 Addis Ababa



查看地图

景点玩乐类型

热门景点

景点类型

- ☐ 博物馆 (8)
- ☐ 景点与地标 (21)
- ☐ 跟团游览 (58)
- ☐ 自然与公园 (6)
- ☐ 购物 (13)
- ☐ 饮食 (5)
- ☐ 户外活动 (26)

展开

热门景点

查看所有



Red Terror Martyrs Me...

561 条点评

专业博物馆



Holy Trinity Cathedral

360 条点评

圣地与宗教景点, 教堂与大...



Ethnological Museum

359 条点评

专业博物馆



National Museum

1,013 条点评

专业博物馆

纪念碑与雕像

查看所有



Menelik II Square

19 条点评

纪念碑与雕像, 景点与地标



Tiglachin Memorial

48 条点评

纪念碑与雕像



Yekatit 12 Martyrs Squ...

7 条点评

纪念碑与雕像, 景点与地标



Meyazia 27 Square Mo...

7 条点评

历史景点, 纪念碑与雕像, ...

博物馆

查看所有



Red Terror Martyrs Me...

561 条点评

专业博物馆



Ethnological Museum

359 条点评

专业博物馆



National Museum

1,013 条点评

专业博物馆



Asni Gallery

20 条点评

美术馆



开始撰写 National Museum 的点评



点击评分



Travelgirl602014

康涅狄格州黑文

10条点评

“在博物馆度过了美好的下午！”

★★★★☆ 2周前点评

下文由TripAdvisor全球志愿者翻译而来，查看原始英文点评

我和我丈夫在这里度过了下午时光，游览了一些旅游景点。他是埃塞俄比亚人，但从未去过博物馆！博物馆很小但有伟大的文物，我们的导游很乐于助人。我以为可能会更新一些，轮椅在那里应该不能使用。我们走楼梯到每一层。总的来说很有趣，但我希望有更多的埃塞俄比亚和东非艺术。大多数的文物都是皇室物品和服装等。我们看到了著名的“Lucy”，但并没有很好地表现埃塞俄比亚今天向艺术世界所提供的东西。

有用？ 感谢 Travelgirl602014

举报



KarenUnterwegs

哥伦比亚特区华盛顿特区

12条点评

“埃塞俄比亚之旅的不错的背景知识”

★★★★☆ 4周前点评

下文由TripAdvisor全球志愿者翻译而来，查看原始英文点评

虽然这家博物馆比较小还算是灰，但是对于来埃塞俄比亚来旅行的人来说，这里还有几场比较有趣的展出。在进行为期两周的北埃塞俄比亚之旅之前和之后我们都来过这里，发现两次都了解到不少东西。下面一层楼的展出讲的是人类进化史，展出很不错，最好别错过。一层的展出讲的是阿克苏姆帝国和阿克苏姆帝国之前的东西。这里不是很大，但是有一些很不错的手工艺品。感谢我们的导游 Netsanet Tessema（通过 Gamel Tours 联系的，强烈推荐）让我们的参观变得更有趣和丰富。如果你去过埃塞俄比亚的话就会知道女导游是多么的少见。支持埃塞俄比亚的职业女性，如果可以的话请联系 Netsanet——她懂的多而且很有魅力！是她让我们短暂的亚的斯亚贝巴之旅变得如此有趣。

有用？ 感谢 KarenUnterwegs

举报



laohai1991

上海市

5条点评

66条点评

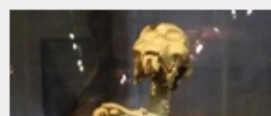
13条景点点评

2张赞成投票

“为Lucy而来”

★★★★☆ 2017-2-20的点评

我来博物馆就是为了看一眼露西Lucy，Lucy是一具发现于埃塞俄比亚的古人类化石标本，生活于约320万年前的类人族，科学界普遍认为全球人类皆由Lucy所属的种群进化而成，很有可能是我们全人类的共同母亲。可是我们的导游Alex说他不信，因为他的信仰告诉他人是神创造的，但这并不妨碍他认真地给我们讲解博物馆。

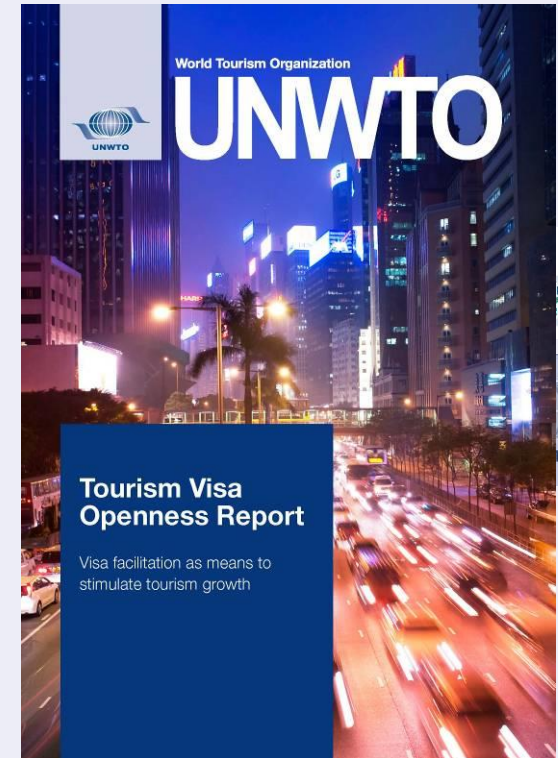
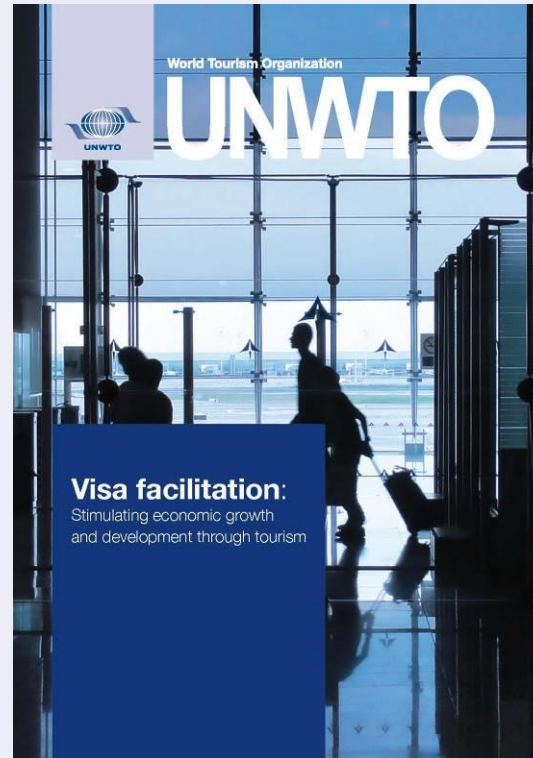


A woman in traditional beaded attire, likely from the Hamar region of Ethiopia, is shown carrying a large bundle of hay or straw on her back. She is wearing multiple necklaces of red, white, and yellow beads, and several metal armbands on her arms. The background is a blurred natural setting with green foliage.

How to prepare

Visa facilitation: UNWTO jointly with partners is working closely with stakeholders to move agenda forward

A number of meetings have taken place and three reports have been prepared taking stock of and analysing the current situation:



For more information and download of reports, see <http://rcm.unwto.org/en/content/facilitation-tourist-travel>

Safe and seamless travel

Visa requirements for visitors from China

visa free: Mauritius, Cook Islands, Hong Kong, Dominica, Grenada, Turks & Caicos Islands

visa free recently introduced: Morocco, Indonesia, Micronesia, Niue, Fiji, Macao, Taiwan (China), Vanuatu, Antigua & Barbuda, Bahamas, Cuba, Ecuador, Haiti, Jamaica

visa upon arrival: Comoros Islands, Seychelles, Cambodia, Laos, Maldives, Samoa, Sri Lanka, Thailand, Timor-Leste, Tuvalu, Bahrain

visa upon arrival recently introduced: Cape Verde, Djibouti, Ethiopia, Guinea-Bissau, Kenya, Madagascar, Malawi, Mauritania, Mozambique, Tanzania, Togo, Uganda, Bangladesh, Iran, Nepal, Palau, Azerbaijan, Tajikistan, Guyana, Jordan, Lebanon,

e-visa recently introduced: Côte d'Ivoire, Gabon, Rwanda, São Tomé e Príncipe, Zambia, Zimbabwe, Australia, Bhutan, India, Malaysia, Myanmar, Singapore, Georgia, Turkey, Colombia, Montserrat, St Kitts & Nevis, United Arab Emirates

Visa needed: Algeria, Angola, Benin, Botswana, Burkina Faso, Burundi, Cameroon, Central African Republic, Chad, Congo, Democratic Republic of Congo, Equatorial Guinea, Eritrea, Gambia, Ghana, Guinea, Lesotho, Liberia, Mali, Namibia, Niger, Nigeria, Reunion, Senegal, Sierra Leone, Somalia, South Africa, Sudan, Swaziland, Tunisia, Afghanistan, Brunei, French Polynesia, Japan, Kiribati, Korea DPR, Korea ROK, Marshall Islands, Mongolia, Nauru, New Caledonia, New Zealand, Pakistan, Papua New Guinea, Philippines, The Solomon Islands, Tonga, Vietnam, Albania, Andorra, Armenia, Austria, Belarus, Belgium, Bosnia & Herzegovina, Bulgaria, Croatia, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Iceland, Ireland, Israel, Italy, Kazakhstan, Kyrgyzstan, Latvia, Liechtenstein, Lithuania, Luxembourg, Macedonia, Malta, Moldova, Monaco, Montenegro, Netherlands, The, Norway, Poland, Portugal, Romania, Russian Federation, The, San Marino, Serbia, Slovak Republic, Slovenia, Spain, Sweden, Switzerland, Turkmenistan, Ukraine, United Kingdom, Uzbekistan, Anguilla, Argentina, Aruba, Barbados, Belize, Bermuda, Bolivia, Bonaire, Brazil, British Virgin Islands, Canada, Cayman Islands, Chile, Costa Rica, Curaçao, Dominican Republic, El Salvador, French Guiana, Guadeloupe, Guatemala, Honduras, Martinique, Mexico, Nicaragua, Panama, Paraguay, Peru, Puerto Rico, Saba, St Eustatis, St Lucia, St Maarten, St Vincent & Grenadines, Suriname, Trinidad & Tobago, United States of America, Uruguay, Venezuela, Egypt, Iraq, Kuwait, Libya, Oman, Qatar, Saudi Arabia, Syria, Yemen



Use of big data in marketing



Handbook on E-marketing for Tourism Destinations

Fully revised and extended version 3.0



UNWTO/ETC Marketing Handbooks

Handbook on
Tourism Destination Branding

With an introduction by Simon Anholt



EUROPEAN
TRAVEL
COMMISSION

Handbook on Key Performance Indicators
for Tourism Marketing EvaluationHandbook on
Tourism Market Segmentation

Maximising Marketing Effectiveness

Handbook on
Tourism Product Development

Recommendations

- **Vitamin 4c: communication, cooperation, collaboration and coordination**
 - With Chinese travel trade
 - In the region
- **Establish presence in China**
- **Professional trainings**
- **Language, signage**
- **Participation in travel shows in China**
- **Film/tv shot in African destinations**
- **Need for an image specially for China market:**
culture needs translation, religion needs interpreting,
people need introduction, food needs sharing
- **Payment: more places accepting Union Pay cards**



European Travel Commission (ETC)

Meet the Chinese Travellers Brochure

MEET THE CHINESE TRAVELLERS

Chinese travellers are on their way to Europe...
Are YOU ready to take your share?

Ni hao! My name is Huang. I'm from Wuhan and for me and my family this is the first time in Europe! We travel as part of a group.



Ni hao! My name is Ji Son and I'm from Beijing. I really love Europe, it is my fourth time here! The last few times I travelled on my own.



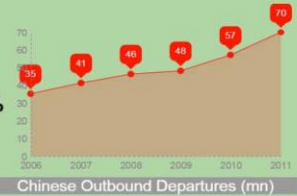
Chinese travellers are very diverse.
If we have to generalise, we can distinguish between
a package tour traveller and **a self-organised traveller**



Why should Chinese tourists matter?

FASTEST
growing tourism source
market in the world

forecasted annual ↑ through 2018=10%



the **BIGGEST** tourism source
market volume-wise



nr. 1
tourism spenders in the world



STOP HERE!

- ✓ A Chinese trip to Europe averages 8-15 days. Chinese tend to spend only 1 to 3 nights in each European country.
- ✓ Most Chinese travellers to Europe are aged 35-60.
- ✓ Most Chinese travellers to Europe have a university or college education.
- ✓ The majority of Chinese visitors to Europe belong to the upper and upper-middle class, they are used to high-quality services.
- ✓ Today, most Chinese travellers still prefer sightseeing over relaxation. However, in the near future, relaxation will become the dominant travel motivation.

www.etc-corporate.org/china-operations-group

What does travel mean to the Chinese?



Hierarchy of the Chinese travellers' needs



What Chinese travellers do before and during a trip?



Travel is for sightseeing - the more the better!

Travel is to explore outside the cities' center and get in-depth experiences

The attitude to travel

Word of mouth, TV, websites

What inspires them to come to Europe?

Websites, electronic word of mouth

Travel agents

Where do they search for travel information?

Online search, travel agents

Travel agents

Where do they purchase the trip?

Independent online booking, travel agents

Full schedules of must-see sites

What are their main activities on a trip?

Sightseeing and relaxing entertainment

Motivation

Shopping!
- Strong interest in famous brands
- Obligations to bring back 'gifts' from their travels

Shopping!
- Personal interest in shopping is important
- Buying regional, authentic, special goods

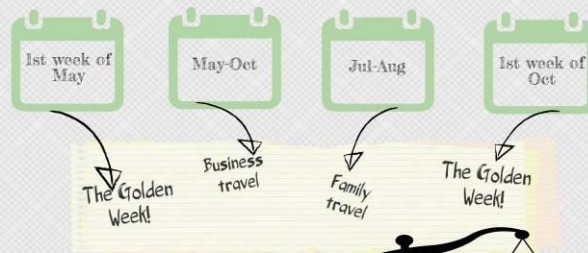
Experience during the trip

We booked our trip with a travel agent. This was convenient since Europe is not familiar to us!

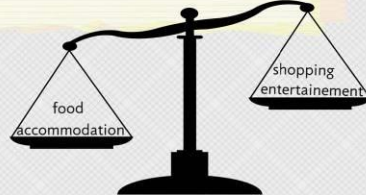
I search online for hotels with Chinese owners. This way I know I will meet other Chinese backpackers!

www.etc-corporate.org/china-operations-group

When do most Chinese travel?



Where do they spend most of their money at the destination?



DID YOU KNOW?



ANNOYANCES

High prices
Lack of Chinese language information & material
Chinese debit cards cannot be used
Need to pay for the use of toilets
Long queues at tourist attractions
Shops close early



Blue sky
High level of cultural sophistication
Clean, peaceful cities and beautiful landscape
Friendly, helpful people
Delicious and safe food
Convenient public transport

DELIGHTS

We went to Louvre in Paris and waited for 2h to enter! My kids were hardly standing!

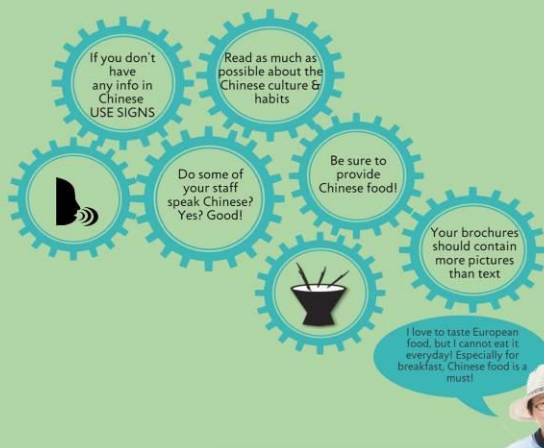
No matter where I take a picture, it will show a beautiful landscape! Everywhere I look I see a bluer sky than I've ever seen in Beijing!



- ✓ Family name comes first, normally only one syllable (Xi Jinping).
- ✓ Status comes before gender, no "ladies first" in China.
- ✓ Many Chinese travellers are money-rich but time-poor. They do not want to wait.
- ✓ Numbers 4 and 44 pronounced in Chinese are similar to "death". Avoid them! Number 8 has a positive connotation.
- ✓ Chinese assign powerful meanings to colors:
YELLOW - the center of everything and signifies neutrality and good luck
RED - symbolises good fortune and joy
BLUE - implies vigor and vitality
WHITE - symbolises mourning and is associated with death and used predominantly in funerals



TOP 8 TIPS TO WIN THE CHINESE!



TIP 1

勇氣

Make your services "China friendly"!

Make sure that your services meet their expectations, don't expect them to like what you offer.

We learned about Karl Marx back in school. Now that I am in Europe, I definitely want to visit his birth place!

I always eat ice cream at the Spanish Steps in Rome, as I want to recreate a scene from the movie "Roman Holiday".

TIP 2



Storify your services

What stories do Chinese know about your destination?

I cannot survive without internet while travelling! I use it for photo sharing, locating restaurants and local transport information.

Most Chinese travellers bring their internet-enabled devices to Europe

TIP 3



Provide Chinese with WiFi!

...and smartly encourage them to spread the voice about your service on Chinese social networks

In China I would dare to ask a foreigner to take a photo of us together, but in Europe I'm too shy.

TIP 4



Set the stage for interaction!

Lead Chinese from observation to participation - engage them in conversations or suggest them ways to interact with locals or other Chinese tourists.

TIP 5



Let them shop!

Do you have Chinese Union pay points? Also, suggest shops opened late hours!

typical highest celebrities choice famous awarded as seen in movies VIP only old hard to get new

TIP 6



Emphasize the value of your services

Find out what phrases attract the Chinese!

Europeans can be rude sometimes. They don't understand our culture, our history, our emotions. It's difficult to connect with them deeply.

TIP 7



Accept Chinese travellers with open arms!

Give service with a smile!

TIP 8



Learn a few useful Mandarin Chinese phrases... right now!

Welcome

歡迎光臨 [歡迎光臨] (huānyíng guānglín)

Hello

你好 (nǐ hǎo) - frm
您好 (nín hǎo) - frm

How are you?

你好嗎? [你好嗎] (nǐ hǎo ma)

I'm fine, thanks. And you?

我很好, 你呢? (wǒ hěn hǎo, nǐ ne)

What's your name?

您貴姓大名? (nín guìxìng dànmíng) (frm)
你叫什麼名字 (nǐ jiào shénme míngzì)

My name is ...

我姓 ... (wǒ xìng ...) (frm)
我叫 ... (wǒ jiào ...)

Pleased to meet you

幸會 [幸會] (xìng huì)

Thank you

謝謝 [謝謝] (xièxie)

Sorry

對不起 [對不起] duìbùqǐ 抱歉 bàoliàn

Good morning

早安 (zǎo ān)

Good evening/good night

晚安 (wǎn ān)

Goodbye

再見 [再見] (zàijiàn)

Mandarin

"the official language of the People's Republic of China"

I am so impressed when Europeans try to speak my language! It doesn't matter whether it sounds perfect - I appreciate the effort!



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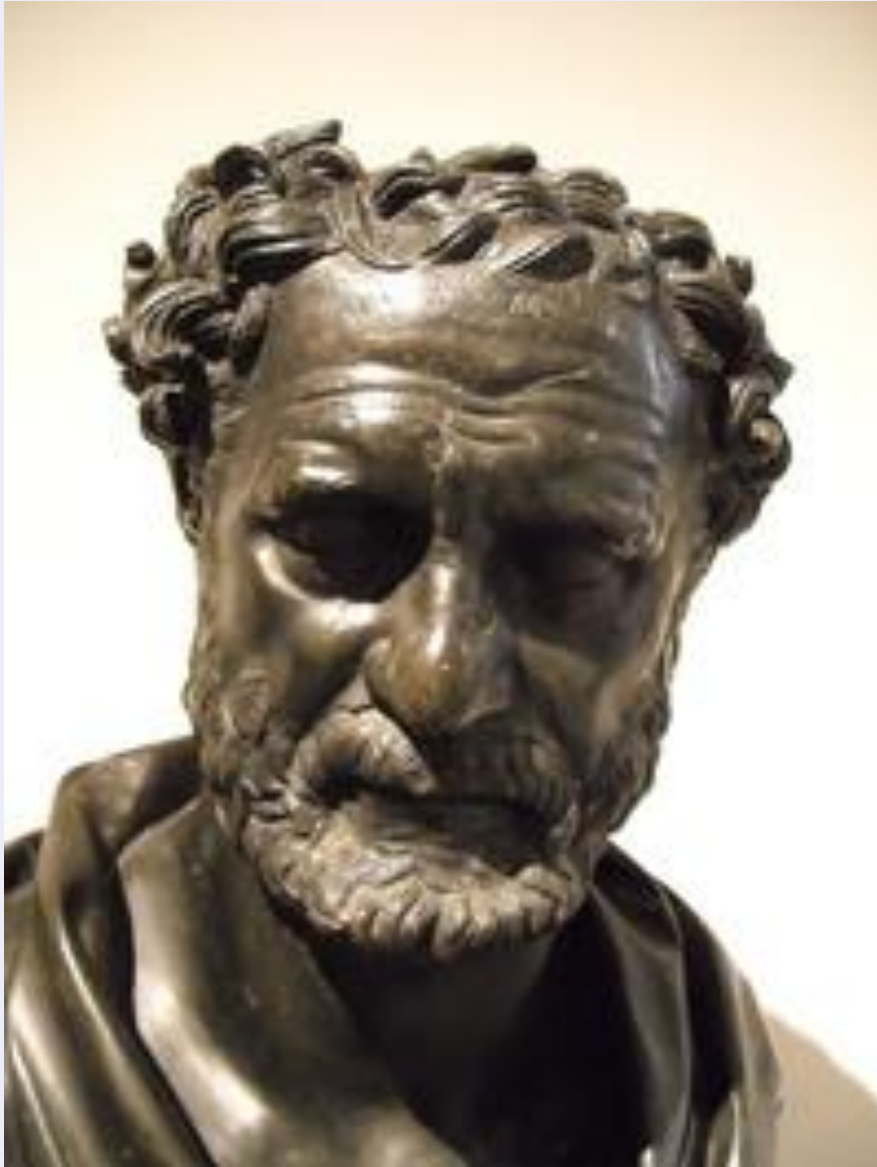
Guilin Forum on Tourism Trends and Outlook

The 11th UNWTO/PATA Forum on Tourism Trends and Outlook
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<http://asiapacific.unwto.org/event/unwtopata-forum>

**‘The only thing that is constant is change’
Heraclitus, c. 535 - 475 BC**



**Thank you very much
for your attention!**

John G.C. Kester

Tourism Market Trends Programme

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