

A study in how Wales could improve the quantity and quality of visits by Chinese tourists

Outline

Chapter 1: Introduction

1.1 Research Sources

1.2 Literature Review

1.3 Methodology

Chapter 2: Chinese Language Advertisements for Tourism in Wales

2.1 Welsh Government

2.2 Social Media

2.3 Travel Guides

Chapter 3: Chinese Opinion of Wales

Chapter 4: Statistical Analysis

4.1 Trends

4.2 Reasons Behind the Trends

Chapter 5: Conclusion

Chapter 1: Introduction

Chinese outbound tourism has hugely increased since the opening of the country by Deng Xiaoping in the 1980s. I have chosen to explore how this has and will affect Wales' tourism industry, and what Wales can do to improve the quantity and quality of visits. Why do Chinese tourists choose to travel to Wales? What is Wales doing to encourage visits by Chinese tourists? What expectations do Chinese tourists have of Welsh tourism? How do they rate hotels, transport, places of interest and so on?

1.1 Research Sources

I will be using a mix of English and Chinese language sources. In order to examine what is currently the Welsh marketing strategy for inbound Chinese tourist I will examine Welsh Government's *Partnership for Growth: The Welsh Government Strategy for Tourism 2013-2020*. This strategy report discusses the importance of tourism, ambition, and focuses on promotion and product development of Wales. This is a primary source, a direct account of the Welsh Government's vision for Welsh Tourism. I will also refer extensively to the Welsh Government website, VisitWales.com, its Chinese language counterpart Wales.cn, VisitBritain.com and perform an interview with a Welsh Government representative.

In addition to this I will refer to physical and online travel guides such as Lonely Planet, TripAdvisor and Mafengwo as these will give a clear indication of what information is currently available for Chinese travellers in Wales.

Social Media plays such a big part in people's lives nowadays that it would be remiss to ignore the advertising power and ease of disseminating information on platforms such as Weibo and WeChat.

I will also review data from statistics such as Statista.com, other reports on the Chinese Tourism Market such as the McKinsey report and interviews/questionnaires with Chinese people, both tourists that have visited Wales and Chinese people that have not visited Wales.

1.2 Literature Review

I have used a McKinsey and Company report (2018) *Chinese Tourists: Dispelling the Myths*. McKinsey and Company is an international management consulting organisation that studies "markets, trends, and emerging best practices, in every industry and region, locally and globally". The report is a rigorously substantiated account of the reality of outbound tourism in China.

Similar studies have been carried out regarding Chinese tourism in other destinations. Thomsen and Tenney's *Chinese Tourism Growth to U.S. National Parks and Gateway Communities: A Case Study in West Yellowstone, Montana* state that Chinese tourism is one of the fastest-growing industries in the world. They looked at trends, perceptions, communication modes and business strategies relating to Chinese tourism.

They found that 'Chinese tourists...are very knowledgeable of technology and use apps and social media as a digital resource and communication tool for traveling'. This shows that countries' tourism marketing strategies need to be modern, online and incorporate the use of apps, blogs and social media in order to maximise their ability to reach Chinese audiences. The authors also point out that 'nature is intertwined with Chinese culture', and that Chinese tourists are attracted to national parks. Wales is a country with numerous scenic and nature spots, which is a major selling-point for tourism and could be developed more to further attract Chinese tourists.

Thomsen and Tenney also found negatives regarding Chinese tourists in the US. 'Service providers have complained of inappropriate waste disposal, rude interactions, and other behaviours of Chinese tourists that are considered unacceptable by the destination's cultural norms' and 'Chinese tourists have perceived discrimination that may be attributed to differences in social norms'. These issues may also exist in Wales. Another negative the authors found was that hotels did not meet Chinese expectations where in China a kettle, slippers, toothbrush, toothpaste and other amenities come as standard, whereas these are not usually included in US hotels. This is the same for Wales, these items are generally not included with the room. The study found that Chinese tourists would like the option of Chinese cuisine, rather than 'Western' food. Some hotels have been quite forthcoming in catering to the needs of Chinese tourists by 'offering amenities specific to Chinese tourists, such as an electric kettle, green tea, and instant noodles, and the ability to book and pay for hotels on WeChat'.

They conclude that 'As Chinese tourism to national parks continues to grow, adopting strategies to address these changes is crucial, both for park management and for gateway communities to ensure a positive visitor experience, sustain the environmental and cultural resources, and strategically manage for tourism development'. This is also relevant and applicable to Chinese tourism to Wales.

Another study, *The Outbound Chinese Tourism to Italy: The New Graduates' Generation* (Antonioni Corigliano)¹ sought to discover the reason Chinese tourists chose a country destination over other destinations when travelling. The author issued questionnaires to 2000 Chinese people in China and further interviewed 100 Chinese tourists in Italy.

The author analysed the influence of bureaucracy, distance and cost, destination reputation and so on, and her main results showed that the top choices for tourists to choose a destination were personal needs, costs, available time and destination reputation. History and arts, and natural landscapes ranked highly in Chinese tourists' choices of tourism destination.

The article concludes that according to Chinese tourists themselves, the biggest intervention needed to increase tourism to Italy is 'to promote the distinctive characteristics of the trip'.

¹ Journal of China Tourism Research, 7: 396–410, 2011

There have been many studies in the Chinese outbound tourism market in general. Another study, *New Chinese Tourists in Europe from 2017*² surveyed trends in Chinese tourists travelling to Europe. The survey found that the travel demographic is changing, and travellers no longer conform to the stereotype of busloads of tourists on shopping holidays, in fact now Chinese tourists are much more varied, from families to backpackers to connoisseurs. The change is due to an emerging middle-class with surplus income and a wanderlust. The report found that Chinese tourists were less likely to visit the UK compared with other European countries, as the Schengen visa is not inclusive of the UK. Chinese tourists appreciate value for money, and due to the long flight time, cost of flights and visa, would rather visit several countries in one trip under one visa than visit only one country, or apply for more than one visa. However, certain special events such as the Olympics buck this trend.

In 2019, the United Nations World Tourism Organisation in collaboration with the Chinese Tourism Academy published '*Guidelines for the Success in the Chinese Outbound Tourism Market*'.³

The report found similar key points as with other research into this subject, namely that China is the largest emerging tourism market. Leisure, sightseeing and gastronomy are main attractions in choosing a destination for Chinese people, price is also a factor in choosing a destination, and that free WIFI, ease of payment (WeChat pay, Alipay, Union Pay) and Mandarin language service are preferred by Chinese tourists.

By marketing a destination via direct channels, using Chinese language in signs and services, having a favourable visa policy and the aforementioned points, Chinese visitors will be more likely to choose that destination.

Five countries are already considered to be 'Chinese-ready' destinations. Can Wales achieve this too?

1.3 Methodology

I will be using mixed methods, such as the collection and qualitative analysis of texts and documents, and interviews and questionnaires with people relevant to the study i.e. Chinese tourists, Welsh Government minister.

Initially I will look at other studies in other countries on the topic and use the findings and trends to examine the topic in Wales. My questionnaire will be tailored to discovering what Chinese tourists want and expect from their travels.

Finally I will analyse what measures are currently being made to meet these requirements, and how Wales could meet these requirements in the future.

² See

https://sete.gr/fileuploads/entries/Online%20library/GR/New_Chinese_Tourists_in_Europe_from_2017_en.pdf

³ See <https://www.e-unwto.org/doi/book/10.18111/9789284421138>

Chapter 2: Chinese Language Advertisements for Tourism in Wales

2.1 Welsh Government

From 1975 until its abolition in 2006 the Welsh Development Agency (WDA) was responsible for promoting tourism in Wales⁴. Since 2006 until present, this role has been performed by the Welsh Assembly Government (known as the Welsh Government since 2014).

The Welsh Government consists of 17 service-sectors of which Tourism is under the remit of 'Business, Economy and Innovation'. The UK Government allocates a budget to the Welsh Government based on the Spending Review and the Welsh Government decides how to divide the budget. According to the Final Budget of 2019-2020, the total allocated fund was £19,126,506,000⁵ of which the Economy and Transport group (including Tourism) received £1,315,134,000, or 6.88% of the total budget.

In 2010 the Welsh Assembly Government produced a Major Events Strategy for Tourism in Wales and published the following mission statement:

Developing a balanced and sustainable portfolio of major events which enhances Wales' international reputation and the wellbeing of its people and communities.⁶

This Strategy aimed at raising Wales' profile in the world and benefitting Wales' economy. The strategy included hosting major sporting events such as Cardiff Half Marathon, the Commonwealth Games, and Ryder Cup, as well as other non-sporting events such as Eisteddfod and festivals.

In addition to the 2010 Major Events Strategy, a Tourism Sector Panel was established in 2011 by the Minister for Economy, Science and Transport, Edwina Hart. The Panel was responsible for strategy development in the sector.

Criticisms

In 2012 Cardiff Business School conducted research into the branding and marketing of Wales as a tourism destination. The report found:

a haphazard approach to marketing Wales abroad, and poor coordination between the UKTI and Welsh Government, not helped by continuing changes in organisation in Wales; – a lack of cohesion in operational and strategic coordination of services; – difficulties associated with the overarching branding of Wales...⁷

⁴ See <https://www.gov.uk/government/organisations/welsh-development-agency>

⁵ See <https://gov.wales/sites/default/files/publications/2018-12/final-budget-2019-2020-note.pdf>

⁶ See <https://gov.wales/sites/default/files/publications/2019-06/event-wales-a-major-events-strategy-for-wales-2010-to-2020.pdf>

⁷ See <http://www.senedd.assembly.wales/documents/s23033/EBC4-02-14p.1%20-%20Evidence%20from%20Dr%20Andrew%20Crawley%20Professor%20Max%20Munday.html?CT=2>

Comparisons

As another separate nation within the United Kingdom of Great Britain and Northern Ireland, Scotland has its own independent tourism department and campaign- VisitScotland. VisitScotland has no Chinese language option on the website (six language options available in total) however there is a vast amount of information available to the Chinese traveller. Chinese Consulate information is available on VisitScotland.

On February 28th, 2020, I contacted the Scottish tourism department by email with the following question:

Is the Chinese Tourism Market a priority for Scottish tourism, and if so what measures (if any) are being taken to attract more Chinese tourists to Scotland? What steps have been taken in China and Scotland respectively?

No response was received.

Recent Years

In a 2013 Wales Week trade mission, Heritage Minister Huw Lewis launched *Wales, Land of the Dragon*, an educational exhibition for the promotion of Wales in Chongqing, China. National Museum Wales loaned artefacts to raise the profile of Wales' culture, language, history and landscape.

In 2014 The Welsh Government launched the 'Just Ask Wales' campaign aimed at attracting foreign investment into Wales and into Welsh Tourism. Now operating under 'Trade and Invest Wales', it said of the Tourism Industry in Wales:

Tourism in Wales is a £5 billion industry with great potential for growth. Wales has three National Parks and five Areas of Outstanding Natural Beauty. The award-winning 1,400 km Wales Coast Path, as well as our mountains, rivers and lakes draw visitors from all over the world. Wales has a distinctive culture, with two living languages. It has three UNESCO World Heritage Sites, and more castles per square km than anywhere else in Europe.⁸

Most recently the Department for Heritage's tourism component, Visit Wales⁹, has been responsible for promoting Tourism in Wales. Visit Wales has a Chinese-language sister site, Wales.cn which is a hub of information relating to Wales including a section on tourism. Of the 21 offices that the Welsh Government has in 12 countries, three are in China: in Beijing, Chongqing and Shanghai. The Wales.cn website is managed by the Chongqing office of the Welsh Government, as are the *Weibo* and *WeChat* Welsh Government social media accounts.

A marketing agreement with Qatar Airways was implemented in 2018 in order to raise global awareness of tourism in Wales. Direct flights from Cardiff to Doha commenced in May 2018 alongside an advertising campaign in China, featuring Chinese actor Jin Dong

⁸ See <https://tradeandinvest.wales/key-industries/tourism>

⁹ See <https://www.visitbritain.org/structure-tourism-britain>

travelling to and showcasing Wales. Journalists from Qatar, China, India and Australia were also invited to Wales to meet with Tourism Minister Lord Elis-Jones to discuss Culture, Tourism and Sport. Lord Elis-Jones said of the agreement:

It's extremely good news that we've been able to work with Qatar Airways on this significant marketing partnership agreement. The new route provides an unprecedented opportunity to enhance global tourism and trade links and showcase Wales internationally. Most international visitors to Wales visit as part of a UK-wide tour. This new route into Cardiff provides an additional UK entry point from Asia-Pacific markets.¹⁰

In addition to these strategies and marketing agreements, Welsh Government also hosts 'familiarisation trips' to international travel agents and tour operators. In 2018, North Wales Tourism hosted a visit to Wales for 14 Chinese Travel Itinerary Operators, to provide them with local knowledge and enable them to better meet Chinese travellers' requirements when planning trips to Wales.

How does Welsh Government brand itself to the Chinese Tourism Market?

I contacted Welsh Government to find out more information about its intentions toward the Chinese market. The following is a record of a private email communication with Phil Griffiths, Senior Regional Analyst, from the Department of Economy and Infrastructure, 1st November 2019.

I note that Welsh Government Chongqing Office has both a Weibo and WeChat account; however, these do not seem to be very active. I wonder if you could tell me the intended audience of these accounts and purpose/goal of these accounts.

- These accounts are run by the Welsh Government office in Chongqing whose remit is mainly focused on trade & investment along with government relations and some activity on tourism, culture and education. There is limited resource in market to allocate to these social media accounts at this stage. However, we understand the importance of social media platforms in China and it is hoped that this can be addressed in the future to increase the visibility of Wales in market.

Is the Chinese Tourism Market a priority, and if so what measures (if any) are being taken to attract more Chinese tourists to Wales? What steps have been taken in China and Wales respectively?

- China is not a priority market for Wales and Visit Wales has limited resources allocated to this market. However, Visit Wales undertakes some targeted activity in market mainly focused on Travel Trade engagement. Visit Wales attends Destination Britain China to promote Wales to key Chinese operators. Here, the aim is mainly to influence FIT and small group travel operators to promote Wales' culture and heritage, adventure activities and landscape that has a strong fit with Wales' product offering. We want to position Wales as a new destination to visit within a UK and Europe trip.

¹⁰ See <https://gov.wales/marketing-partnership-agreement-qatar-airways-will-raise-wales-profile-globally>

Other than Weibo and WeChat within China, and VisitWales within Wales, does Welsh Government use other advertising platforms (for China)? I have seen the joint Qatar-Welsh Government venture; have there been any other similar ventures?

- Visit Wales sometimes works with partners that are established in market, such as Qatar Airways, as well as with VisitBritain and Marketing Manchester, who have teams on the ground in China. Given our limited resources in market, working with partners allows us to reach new consumers and increase the visibility of Wales in China.

Has Welsh Government considered how to adapt the tourism industry to cater more for the needs of Chinese tourists?

- Visit Wales, often in partnership with VisitBritain, occasionally brings Chinese press, media and tour operators to Wales on familiarisation trips. These visits give our tourism industry in Wales the opportunity to learn more about the Chinese market and the holiday needs of Chinese consumers. Visit Wales and Welsh tourism suppliers also participate in a range of industry events, such as World Travel Market, Destination Britain China and Explore GB, where suppliers meet with Chinese operators to learn more about Chinese travellers and understand how to adapt their product to suit the market.

This interview shows that Welsh Government is currently prioritising trade and investment over tourism, which generates the question-why? A theme throughout the answers is a financial/resource problem, however some methods of promotion such as updating social media on a regular basis would take little time or money yet could potentially reap a large reward-awareness. Also, Chinese students are very important for Welsh universities so attracting more Chinese tourists would serve as an advertisement for Wales and potentially lead to more students considering studying at Welsh universities.

One notable campaign at attracting Chinese tourists is by VisitBritain, which gave Welsh tourist destinations Chinese names, making the places sound more 'Chinese-friendly'.¹¹

2.2 Social Media

Is the Welsh Government effectively utilising social media to promote Welsh tourism to the Chinese market?

- Weibo

Weibo is a Chinese microblog website where users can make short and frequent posts. As of March 2019, it had 462,000,000 active monthly users¹². The Welsh Government created an official account in January 2018 under the name “英国威尔士政府重庆办公室” (British Welsh Government Chongqing Office).

¹¹ See <https://www.bbc.co.uk/news/av/uk-wales-31496356/welsh-tourist-destinations-get-chinese-names>

¹² See <https://data.weibo.com/report/reportDetail?id=433&sudaref>

The British Welsh Government Chongqing Office's Weibo account is not very active. In fact, the posts are few and not recent (latest post May 2019, accessed May 2, 2020) which is surprising considering the ubiquity and popularity of the platform.

However, the Welsh Government- Qatar Airways advertisement for Welsh tourism was also posted on the Weibo account. This advertisement was posted in two parts, receiving 1250 comments and 2239 likes for part one and 662 comments and 1649 likes for part two (data collected 23rd September 2019). I find these figures considerably low compared with the almost half-billion active users.

- WeChat

WeChat is also a popular form of social media used by Chinese people across China and beyond. The Welsh Government has an official account (again operated by the Chongqing Office) which leads with the introduction:

Welcome to the official account of the Welsh Government of the UK! We will share with you the latest information on trade, culture, education, tourism etc in Wales, as well as the latest developments of the Welsh Government in China...
Inviting you to approach Wales together...

However, again I find that the account has little content and no recent content. It has a total of 854 views (data collected 29th September 2019). Compare this with over a billion daily active users¹³, this is a poor result.

2.3 Travel Guides

Lonely Planet Guidebook

In a Chinese language travel guide for the United Kingdom that numbers 1028 pages, there are 102 pages about Wales. The guide hosts a wealth of information on Welsh history, place locations, sights and activities, traveling with children, tours, festivals, accommodation, food and drink, international and local transport and so on. It includes maps, photographs and important information for the Chinese visitor to Wales, such as the *Renminbi* and Pound Sterling currency exchange rate.

The guide itself is readily available in bookshops in China, and on *Taobao*, China's largest online shopping platform. Priced at 97 RMB, (£10.46 December 2019) it is cheaper than its English-language counterpart *Lonely Planet Great Britain*, and reasonably priced for a Chinese traveller.

Online Travel Guides

Mafengwo: This is a comprehensive Chinese-language travel guide accessible in mainland China. It has information about travelling to Wales, including recommended places (Cardiff, Swansea, Conwy and Llandudno etc), hotels, scenic spots, travel diaries (with photographs), tour information, visa application service, Q&A, and flights.

¹³ See <https://www.statista.com/statistics/255778/number-of-active-wechat-messenger-accounts/>

Qunar: This is an online flight and travel information search engine. Whilst a search for 'UK' results in flight, visa and tour information, a search for 'Wales' yields no results.

Ctrip: This is one of the most popular travel websites in China. A search of 'Wales' results in information and guidance related to weather and climate, visas, scenic spots, accommodation, food and drink, shopping, travel notes, itineraries, local travel guides, and holidays.

Chapter 3: Chinese Opinion of Wales

First, we must establish what Chinese travellers look for when choosing where to travel. According to McKinsey and Company's 2018 report¹⁴ on the Chinese outbound travel market Chinese travellers have increasingly diverse travel needs, with package tours on the rise as Chinese take advantage of higher salaries, more countries offering obtainable visas, and a greater number of flights with more direct routes to a larger number of destinations worldwide.

McKinsey and Company discovered that the rising factors when selecting a travel destination for the Chinese were scenery, fine dining, and an increasingly important factor is the ability to make digital transactions. China is becoming an increasingly cashless society. With the rise and popularity of Alipay and WeChat Pay, people can and do leave their homes in the morning without a 'Jiao' and return home at night having paid for all meals, transportation, services and purchase with their mobile phones. This is a convenience for everyone, for the retailer can make more transactions per minute, and the buyer can be on their way within a matter of seconds. These financial platforms are now an integral part of Chinese life, and not being able to use them is like going back in time.

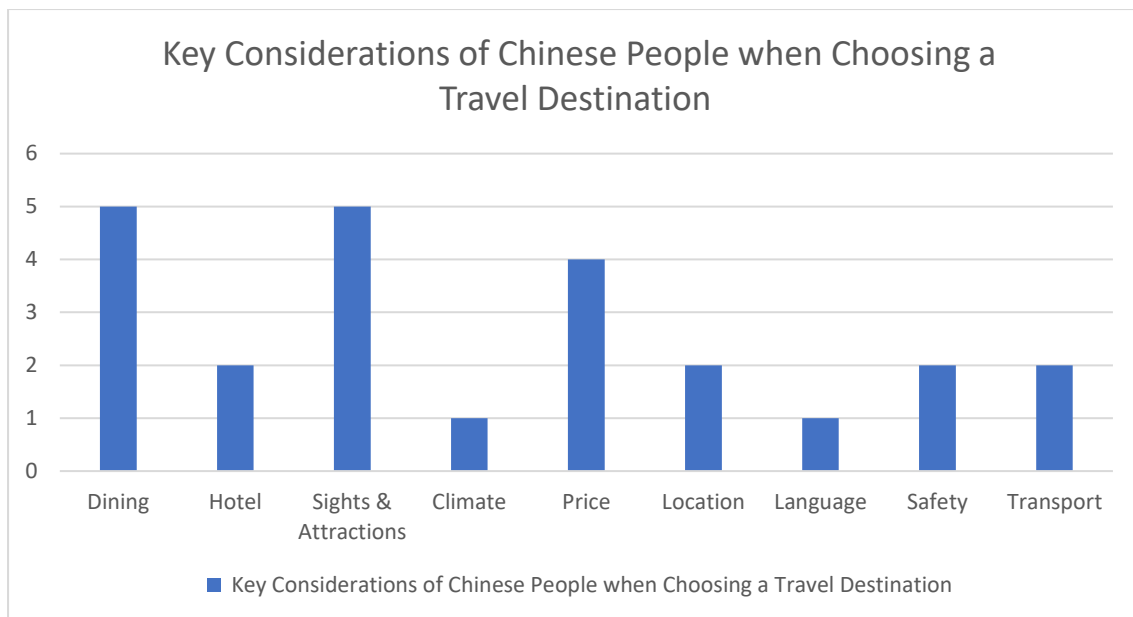
Survey of Chinese people's travel needs*¹⁵

I used WeChat to conduct a short survey amongst 10 Chinese colleagues and acquaintances, namely, to find out what the most important aspect they consider when deciding where to travel. I received the following results (all had more than one consideration):

¹⁴ See

<https://www.mckinsey.com/~media/McKinsey/Industries/Travel%20Transport%20and%20Logistics/Our%20Insights/Huanying%20to%20the%20new%20Chinese%20traveler/Chinese-tourists-Dispelling-the-myths.ashx>

¹⁵ *This was originally a questionnaire (see Appendix B) to be delivered to Chinese tourists presently in Wales. I had planned to visit hotels and transport hubs such as airports and railway stations and disseminate the questionnaires amongst Chinese travellers onsite. However, due to the unforeseeable outbreak of COVID-19 in China in December 2019, and in Wales in February 2020, this plan became unviable and I amended the questionnaire to an online survey. See <https://www.bbc.co.uk/news/uk-wales-51450517>



It is evident from this survey that ‘dining’ and ‘sights and attractions’ are the most important consideration (with 50% of responses respectively citing these as key points), closely followed by price.

Does Wales meet Chinese people’s requirements and expectations?

McKinsey and company found that Chinese tourists traveling to Europe considered the hotel the most important factor of the trip. They sought luxury and quality, with price being not as important as facilities, services and brand. Marriott and Hilton are two high-end hotels popular with Chinese tourists.

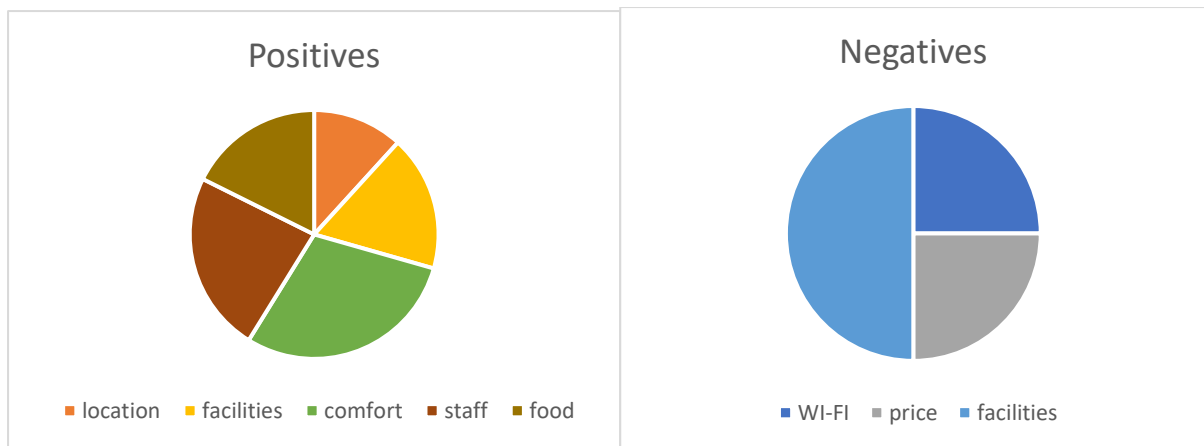
These high-end hotels are not common in Wales. Marriott and Hilton have only two of each of their chains in Wales (Cardiff and Swansea, Cardiff and Newport respectively). Other hotels that are popular with Chinese people such as Shangri-La, Sofitel and Crowne Plaza do not have a branch in Wales.

A search of guest reviews in Chinese language provided the following results:

(for original comments see Appendix A)

Chinese reviews of hotels in Wales, results taken from Booking.com’s recommended choices ‘The 10 Best 5-Star Hotels in Wales, UK’¹⁶

¹⁶ See <https://www.booking.com/fivestars/region/gb/wales.en-gb.html>



These results show that comfort was what most Chinese travellers liked best about their trip in Wales, and that facilities, whilst being popular with some travellers was also the least favoured aspect of Chinese travellers' trips in Wales.

Chapter 4: Statistical Analysis

4.1 Trends

China's travel market is growing rapidly, with 155.02m tourists spending \$277bn from 2008-2018 on outbound travel alone¹⁷. According to Statista, "The most popular travel destination of young Chinese luxury travellers was Europe with a share of 61 percent".

According to the Office of National Statistics' latest release of travel trends¹⁸ there were 37.9m visitors to the UK from overseas in 2018. For the first time since 2010, this figure has decreased (by 3%). The same year also saw a decrease in spending by overseas visitors to the UK. Overseas visitors spent £22.9bn, 7% less than the previous year.

There was an increase in international visitors to Wales in 2019¹⁹ (statistics currently available for Jan-June 2019 only). During this period there were 446,000 trips to Wales by international visitors, who spent £174 million. These figures show increases of 3% and 4% respectively.

Here we see a decrease in overseas tourism UK-wide, but an increase in overseas tourism regionally in Wales. This is positive news for Wales, however there is still scope for these numbers to be improved. Accommodation occupancy rates averaged 54% over the first six months of 2019, therefore 46% of accommodations were empty over this period²⁰.

Globally, there has been a rise in international tourism, with worldwide arrivals reaching 1.4bn in 2018²¹. This figure sees an increase of 6% on previous years.

¹⁷ See <https://www.statista.com/topics/1210/tourism-industry-in-china/>

¹⁸ See <https://www.ons.gov.uk/peoplepopulationandcommunity/leisureandtourism/articles/traveltrends/2018>

¹⁹ See <https://gov.wales/sites/default/files/statistics-and-research/2019-11/wales-tourism-performance-january-june-2019-828.pdf>

²⁰ As above

²¹ See <https://www.theguardian.com/travel/2019/jan/22/tourist-numbers-to-the-uk-down-while-global-figures-continue-to-rise>

Reasons for these trends

China's outbound overseas tourism has increased because

- higher GDP
- stable fuel prices
- improved air links

The United Kingdom's inbound overseas tourism has decreased because

- expensive destination
- Brexit
- trade tensions
- travel restrictions due to COVID-19

Chapter 5: Conclusion

The object of this study was to find out what Chinese people think of Wales as a tourism destination, and what Wales can do to attract more Chinese tourists to visit. The results found that although over the past decade there have been many initiatives to attract tourists to Wales, just one has been Chinese-oriented (Qatar Airlines-Welsh Govt. marketing project).

There has been no attempt to recognise Chinese-specific travel needs, nor any attempt to cater to these. Research and communication have been limited in these areas, due to lack of financial resources and a less focused, broader spectrum inbound tourism marketing strategy.

Wales is a country rich with places of historical interest and scenic beauty. Its beautiful beaches and magnificent mountains conform to the Chinese *shan-shui* ideal of landscape beauty. These natural resources could certainly be exploited to attract more Chinese tourists and in turn benefit the local economy.

Moreover, here are several areas of which Wales could improve in becoming more China-friendly. Chinese language tourism information at tourism attractions, hotels and restaurants and online would certainly promote Wales as a China-friendly destination. Incorporating Chinese payment technology and accepting payment for goods and service via WeChat Pay, Alipay, and Union Pay would mark Wales as a modern, convenient and technologically advanced nation. Providing amenities in hotels and restaurants to help Chinese tourists feel 'at home away from home' would also highlight how welcoming Wales is to Chinese tourists.

By implementing these steps and marketing Wales to China as a friendly and welcoming tourism destination, Wales could see tourism increase in the future. Making change costs time and money, but by investing in China- the most populous country in the world- with

the second highest GDP in the world²²- with an emerging middle-class wanting to see the world- it is also an investment in Wales and Wales' future.

²² See www.imf.org (accessed 2/3/2020)

Appendix A

Foyles of Glasbury, 5*

位置非常好，主人安排的房间很安静，这里的一日三餐都是周边地区范围内最高水平的。

房间内的网络信号很不好，多数时间完全无法使用，建议主人能改善

Plas Maenan Country House, 5*

周围环境非常优美，房间装饰很温馨，员工服务热情周到，餐厅食物可口。

洗澡水太小不舒服

女主人热情好客，亲自下厨为我们准备的早餐令人惊艳！

Gwesty Cymru Hotel and Restaurant, 5*

就在海边，离城中心和火车站都是步行距离，海边的景致很美，特别是住处的餐厅，里面的食物味道很好！里面的员工工作都很认真，待人和气。

旋转楼梯的地毯走起来比较厚，突出楼梯，走起来要小心

Manorhaus Ruthin, 5*

第二次入住，很舒服。推荐边上的 PandaGarden 中餐馆

早餐美味，接待人员殷勤，房间舒适，只是我们的房门较小，高大人仕出入较辛苦。有桑拿和蒸氣室享用令人驚喜！

晚飯費用較貴

Appendix B

Questionnaire for Chinese Tourists in Wales

1. Where are you from?
您来自哪里?
2. How many times have you visited Wales?
您来过威尔士几回?
3. Have you visited/do you intend to any other destination on this trip?
您打算在这趟旅行访问其他地方吗?
4. What is your main purpose of visiting Wales?
您来威尔士的主要目的是什么?
5. Where in Wales have you visited/do you intend to visit?
您去过/准备去威尔士的什么地方?
6. What do you like about Wales?
您喜欢威尔士的什么?
7. What do you dislike about Wales?
您不喜欢威尔士的什么?
8. How do you think Wales can better cater for Chinese tourists?
您有什么建议能让威尔士更好地迎合中国旅客的需求?

Bibliography

ANONYMOUS, *Welsh Development Agency Welcomes Chinese Investment*, May 14th, 2002, Xinhua News Agency

ANTONIONI CORIGLIANI, M, *The Outbound Chinese Tourism to Italy: The New Graduates' Generation*, 2011, *Journal of China Tourism Research*, 7: 396–410

ARLT, W. G., *How Chinese Travelers View Europe*, 2017, New York, Forbes

BROWN, G, *Discourse analysis*, 1983, Cambridge, Cambridge University Press

CHENG, S, *Study on Chinese Tourism Web Sites' Distribution and Online Marketing Effects*, 2010, *Journal of China Tourism Research*, 6(4), pp. 383-396

DICHTER, A, ET AL, *Chinese Tourists- Dispelling the Myths*, 2018, McKinsey and Company

ELSE, D.E.A. ET AL, *英国*, 2009, Beijing, 生活·读书·新知三联书店.

MANSER, M.H., *Oxford Chinese Dictionary English-Chinese, Chinese-English. 4th ed.* 2009, Oxford, Oxford University Press/Commercial Press.

NATIONAL ASSEMBLY FOR WALES and ENTERPRISE AND BUSINESS COMMITTEE, *The Welsh Government's Approach to the Promotion of Trade and Inward Investment*, 2014, Wales

NIEDERGANG, E, *Wales China: 250 Years of History*. 2015, Wales, Ying Hua Books

RAWNSLEY, G.D. ET AL, *Routledge Handbook of Chinese Media* 2015, London, Routledge

ROBSON, C, *Real World Research*. 4th ed, 2016, New Jersey, John Wiley & Sons, Inc.

SCHULZ-MONTAG, B, ET AL, *New Chinese Tourists in Europe from 2017*, 2012, Hanover

THOMSEN, J.M. ET AL, *Chinese Tourism Growth to U.S. National Parks and Gateway Communities: A Case Study in West Yellowstone, Montana*, 2019, *Journal of Park & Recreation Administration* 37.3 (2019): 1-19.

WELSH GOVERNMENT, *Partnership for Growth: The Welsh Government Strategy for Tourism 2013-2020*, 2013, Wales

WORLD TOURISM ORGANISATION, *Guidelines for the Success in the Chinese Outbound Tourism Market*, 2019, Madrid, UNWTO

WORLD TOURISM ORGANISATION, *Penetrating the Chinese Outbound Tourism Market: Successful Practices and Solutions*, 2017, Madrid, UNWTO

Websites

www.bbc.co.uk

www.booking.com

www.china-outbound.com

www.ctrip.com

www.gov.cn

www.gov.uk

www.gov.wales

www.holidayweekly.pk

www.imf.org

www.lonelyplanet.com

www.mafengwo.cn

www.ons.gov.uk

www.qunar.com

www.statista.com

www.tripadvisor.co.uk

www.visitbritain.com

www.visitscotland.com

www.visitwales.com

www.wales.cn

www.wechat.com

www.weibo.com