

# PROFILE OF CHINESE ARRIVALS TO JAMAICA



- ◆ Seasonality of Chinese Arrivals to Jamaica
- ◆ Chinese Arrivals by Purpose of Visit
- ◆ Age and Gender Distribution
- ◆ Resort Area and Accommodation of Stay
- ◆ Intended Hotel of Stay
- ◆ Port of Embarkation and Airlines Used

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Jamaica Tourist Board

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# Prospects for the Chinese Outbound Market 2007

## China's economy is growing apace

China's economy grew strongly in the first nine months of the year, despite efforts by the government to put the brakes on growth. The Chinese economy grew 9.4% more than a year ago, according to the *National Bureau of Statistics*. Total GDP for the nine months from January to September grew to total 10.627 trillion Yuan (\$1.3tr; £738bn). In addition to strong economic performance, China has the largest population in the world – 1.3 billion people. China's economic performance married with a large population makes an excellent combination for sustained outbound travel from China.

## 100MM Chinese travellers by 2020

One of the most widely quoted statistics on China is *UNWTO's* forecast that China will produce 100 million outbound tourists by 2020. This outbound market has been growing extremely fast: it leapt from 20 million in 2003 to some 31 million in 2005, growth of 55 per cent.

## Hong Kong and Macau main destinations for Chinese travelers

This figure includes all outbound travel from the Chinese mainland, including trips to Hong Kong and Macau. In 2005, 71% of all Chinese outbound visitors were to these two areas. Following world trends of strong intra-regional travel, a further 17% travelled to destinations within Asia. Roughly 5% went to Europe. If forecasts confirm, and the proportions hold around the same level, Europe may expect to receive at least 5 million Chinese visitors by 2020. This is the same number of Japanese travelling to Europe in the peak year of 2000.

## Competition for the Chinese pocket is strong

Chinese outbound travellers spent a total of US\$ 21.8 billion abroad in 2005, up from US\$ 19.1 billion in 2004 (+14%). But, it might be a challenge to turn the Chinese outbound market into a profitable one. Price competition is fierce, driven in many cases by the short lead time (65% of all bookings are made in Europe 2-4 weeks prior to arrival). However, it is known that Chinese travellers spend a lot on shopping. France, Italy, UK and Germany are some of the destinations with the greatest appeal to Chinese travellers.

## Outlook on outbound travel very positive

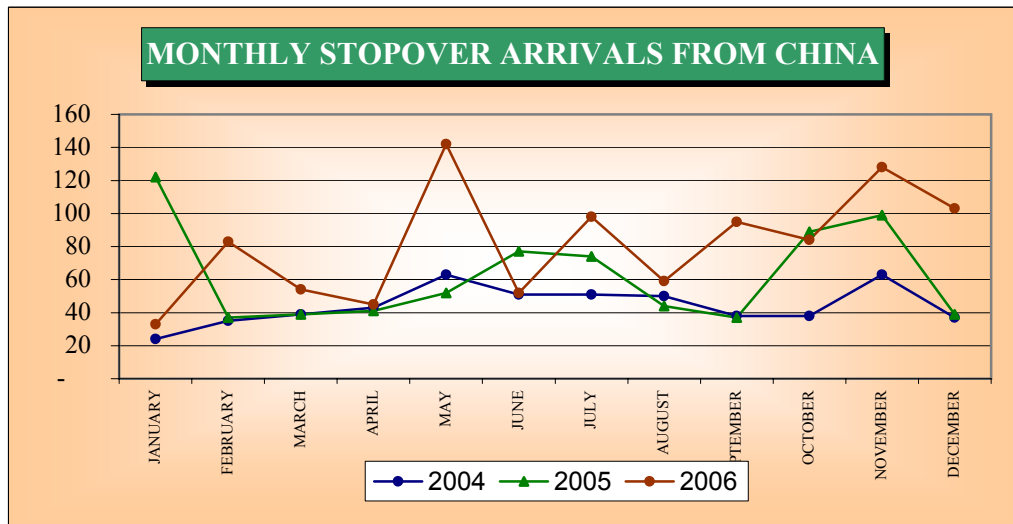
The Chinese outbound travel market is expected to grow from strength to strength as their economy continues to advance and as more and more countries are added to the list of approved countries. China's forecast growth, in both outbound travel and expenditure, make this market critical now and in the future.

*Source: UN World Tourism Organisation, Chinese Outbound Tourism Market, 2006*

**TABLE 1**

**MONTHLY STOPOVER ARRIVALS FROM CHINA TO JAMAICA**

	2004	%Share	2005	%Share	2006	%Share	%Change
JANUARY	24	4.5	122	16.3	33	3.4	-73.0%
FEBRUARY	35	6.6	37	4.9	83	8.5	124.3%
MARCH	39	7.3	39	5.2	54	5.5	38.5%
APRIL	43	8.1	41	5.5	45	4.6	9.8%
MAY	63	11.8	52	6.9	142	14.5	173.1%
JUNE	51	9.6	77	10.3	52	5.3	-32.5%
JULY	51	9.6	74	9.9	98	10.0	32.4%
AUGUST	50	9.4	44	5.9	59	6.0	34.1%
SEPTEMBER	38	7.1	37	4.9	95	9.7	156.8%
OCTOBER	38	7.1	89	11.9	84	8.6	-5.6%
NOVEMBER	63	11.8	99	13.2	128	13.1	29.3%
DECEMBER	37	7.0	39	5.2	103	10.6	164.1%
	<b>532</b>	<b>100.0</b>	<b>750</b>	<b>100.0</b>	<b>976</b>	<b>100.0</b>	<b>30.1%</b>



**TABLE 2**

**STOPOVER ARRIVALS TO JAMAICA BY PURPOSE OF VISIT**

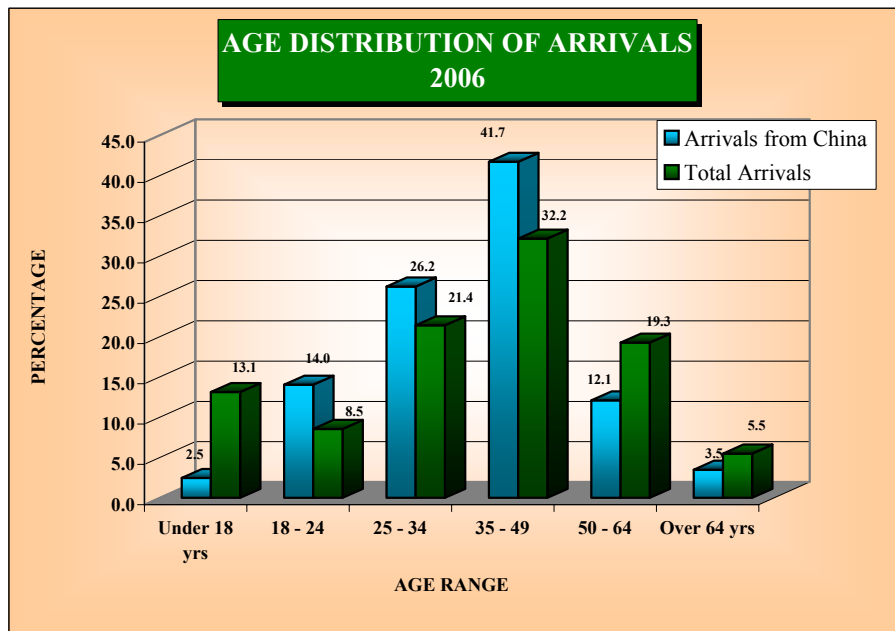
Purpose of Visit	Total Arrivals		Arrivals from China				%Change 2006/05
	2006	%Share	2006	%Share	2005	%Share	
Leisure, Recreation & Holiday	1,346,748	80.2	316	32.4	274	36.5	15.3
Visiting Friends & Relatives	121,698	7.2	105	10.8	100	13.3	5.0
Business	100,649	6.0	223	22.8	215	28.7	3.7
Other /Not stated	109,810	6.5	332	34.0	161	21.5	106.2
<b>Total</b>	<b>1,678,905</b>	<b>100.0</b>	<b>976</b>	<b>100.0</b>	<b>750</b>	<b>100.0</b>	<b>30.1</b>



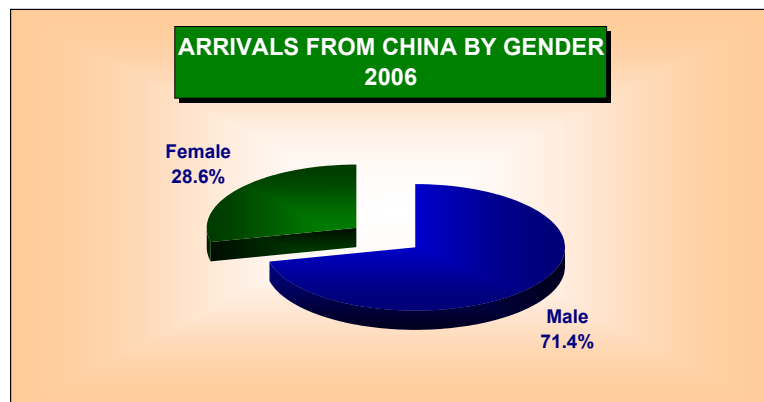
**TABLE 3**

**STOPOVER ARRIVALS TO JAMAICA BY AGE**

Age Range	Total Arrivals		Arrivals from China			
	2006	%Share	2006	%Share	2005	%Share
Under 18 yrs	220,319	13.1	24	2.5	17	2.3
18 - 24	143,455	8.5	137	14.0	164	21.9
25 - 34	359,505	21.4	256	26.2	217	28.9
35 - 49	540,099	32.2	407	41.7	227	30.3
50 - 64	323,363	19.3	118	12.1	94	12.5
Over 64 yrs	92,164	5.5	34	3.5	31	4.1
	1,678,905	100.0	976	100.0	750	100.0



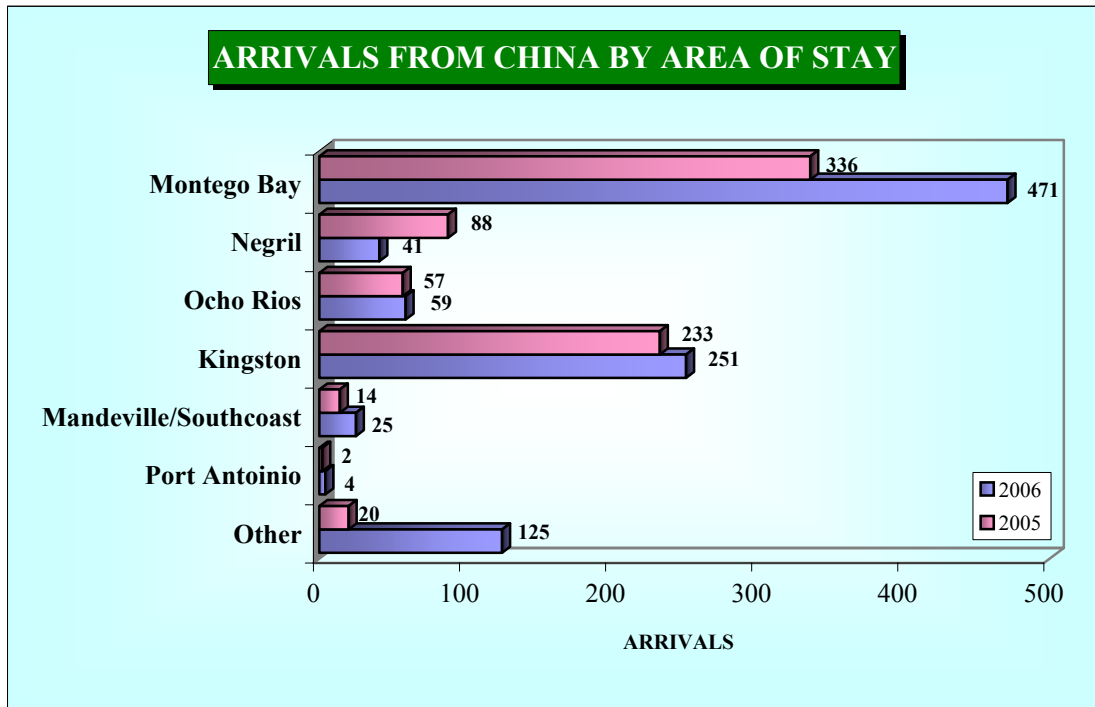
GENDER	Total Arrivals		Arrivals from China			
	2006	%Share	2006	%Share	2005	%Share
Male	786,338	46.8	697	71.4	455	60.7
Female	892,567	53.2	279	28.6	295	39.3
	1,678,905	100.0	976	100.0	750	100.0



**TABLE 4**

**STOPOVER ARRIVALS TO JAMAICA BY INTENDED RESORT AREA OF STAY**

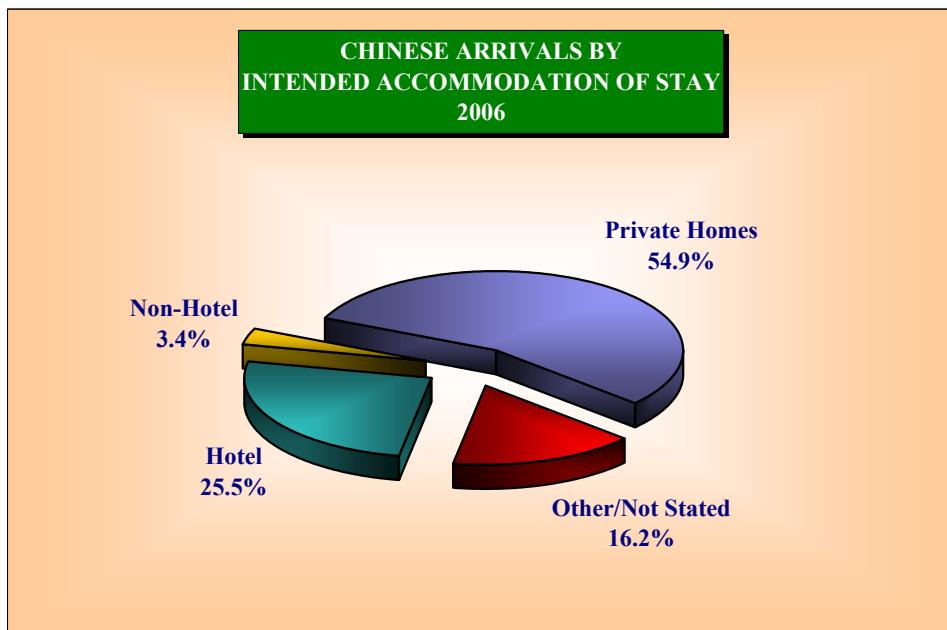
Resort Area	Total Arrivals		Arrivals from China				%Change 2006/05
	2006	%Share	2006	%Share	2005	%Share	
Montego Bay	448,913	26.7	471	48.3	336	44.8	40.2
Negril	353,032	21.0	41	4.2	88	11.7	-53.4
Ocho Rios	393,993	23.5	59	6.0	57	7.6	3.5
Kingston	223,102	13.3	251	25.7	233	31.1	7.7
Mandeville/Southcoast	105,846	6.3	25	2.6	14	1.9	78.6
Port Antonio	18,811	1.1	4	0.4	2	0.3	100.0
Other	135,208	8.1	125	12.8	20	2.7	525.0
<b>Total</b>	<b>1,678,905</b>	<b>100.0</b>	<b>976</b>	<b>100.0</b>	<b>750</b>	<b>100.0</b>	<b>30.1</b>



**TABLE 4a**

**CHINESE ARRIVALS BY INTENDED ACCOMMODATION OF STAY**

Resort Area								
	Hotel	Non-Hotel	Private Homes	Other/Not Stated	2006	%Share	2005	%Share
Montego Bay	168	21	173	109	471	48.3	336	43.0
Negril	21	3	16	1	41	4.2	88	8.6
Ocho Rios	24	9	20	6	59	6.0	57	6.8
Kingston	33	0	199	19	251	25.7	233	36.7
Mandeville/Southcoast	2	0	0	23	25	2.6	14	2.6
Port Antonio	0	0	4	0	4	0.4	2	0.8
Other	1	0	124	0	125	12.8	20	1.5
<b>Total 2006</b>	<b>249</b>	<b>33</b>	<b>536</b>	<b>158</b>	<b>976</b>	<b>100.0</b>	<b>750</b>	<b>100.0</b>
<b>%Share</b>	<b>25.5</b>	<b>3.4</b>	<b>54.9</b>	<b>16.2</b>	<b>100.0</b>			
<b>Total 2005</b>	<b>314</b>	<b>22</b>	<b>366</b>	<b>48</b>	<b>750</b>			
<b>%Share</b>	<b>41.9</b>	<b>2.9</b>	<b>48.8</b>	<b>6.4</b>	<b>100.0</b>			



**TABLE 5****STOPOVER ARRIVALS TO JAMAICA BY INTENDED AREA OF STAY**

Hotel	Arrivals from China			
	2006	%Share	2005	%Share
RITZ CARTLON	30	3.1	11	1.5
SUNDANCE RESORT	26	2.7	22	2.9
HALF MOON	20	2.0	6	0.8
GLOUCESTERSHIRE	17	1.7	3	0.4
STARFISH TRELAWNY	12	1.2	0	0.0
COURTLEIGH, THE	12	1.2	7	0.9
HILTON KINGSTON	10	1.0	53	7.1
BLUE HABOUR	9	0.9	0	0.0
HOLIDAY INN	9	0.9	2	0.3
SUNSET JAMAICA GRANDE	8	0.8	4	0.5
WEXFORD COURT	7	0.7	14	1.9
CRANE RIDGE RESORTS	6	0.6	0	0.0
SUNSET BEACH RESORT & SPA	5	0.5	14	1.9
HEDONISM II	5	0.5	0	0.0
ROSE HALL RESORTS & COUNTRY CLUB	4	0.4	46	6.1
JAMAICA PEGASUS	4	0.4	20	2.7
RIU TROPICAL BAY	2	0.2	39	5.2
COYABA BEACH	2	0.2	5	0.7
SANDALS MOBAY	2	0.2	3	0.4
ROUND HILL	1	0.1	10	1.3
CORAL CLIFF	1	0.1	5	0.7
KNUTSFORD COURT HOTEL	1	0.1	4	0.5
MARINER'S INN	0	0.0	15	2.0
INDIES	0	0.0	3	0.4
RIO BLANCO	0	0.0	3	0.4
OTHER HOTELS	56	5.7	25	3.3
<b>TOTAL HOTEL</b>	<b>249</b>	<b>25.5</b>	<b>314</b>	<b>41.9</b>
NON HOTEL ACCOMMODATION	33	3.4	22	2.9
PRIVATE HOMES	536	54.9	366	48.8
OTHER	158	16.2	48	6.4
<b>TOTAL</b>	<b>976</b>	<b>100.0</b>	<b>750</b>	<b>100.0</b>
Hotel Length of Stay (nights)	17.5		8.2	
Total Length of Stay (nights)	43.5		20.0	

> In 2006 the hotels in Montego Bay were the dominant properties to which Chinese visitors chose to stay in. Of the top ten hotels, 7 were in Montego bay.

**CHINESE ARRIVALS TO JAMAICA BY MAJOR AIRLINES USED IN 2006**

Port of Embarkation	Air Jamaica	Martin Air	Condor	American Airlines	Air Canada	British Airways	US Air	B.W.I.A	Austrian Airlines	Charter Airlines	Continental Airlines	United Airlines	Delta Airlines	Cayman Airways	Northwest Airlines	Copa Airlines	Virgin Airlines	Spirit Airlines	Total 2006	% Share 2006	Total 2005	% Share 2005
USA Ports																			9	0.9	3	0.4
Atlanta [ATL]	5												4						-	-	3	0.4
Baltimore [BWI]																			-	-	3	0.4
Boston [BOS]																			-	-	2	0.3
Charlotte [CLT]	2						4					4							4	0.4	7	0.9
Chicago [ORD]																			6	0.6	1	0.1
Cincinnati [CVG]													2						2	0.2	3	0.4
Dallas [DFW]																			1	0.1	3	0.4
Detroit [DET]	3									1									-	-	-	-
Ft. Lauderdale [FLL]																		1	5	0.5	4	0.5
Houston [IAH]	17							1		2									2	0.2	4	0.5
Los Angeles [LAX]																			17	1.7	18	2.4
Memphis [MEM]																			-	-	1	0.1
Miami [MIA]	6																		83	8.5	73	9.7
Milwaukee [MKE]																			-	-	-	-
New York [JFK]	8			77															24	2.5	24	3.2
Newark [EWR]	8			16							2								10	1.0	5	0.7
Orlando [MCO]	2																		2	0.2	3	0.4
Philadelphia [PHL]								1											1	0.1	2	0.3
Washington DC [DUL]												3							3	0.3	-	-
Canada Ports																			36	3.7	28	3.7
Toronto [YYZ]	7				29														-	-	2	0.3
Caribbean Ports																			-	-	8	1.1
Antigua [ANU]																			4	0.4	53	7.1
Bahamas [NAS]	2																		3	0.3	40	5.3
Barbados [BGI]	3							2											3	0.3	2	0.3
Bonaire [BON]														1					5	0.5	19	2.5
Cayman [GCM]	2																		40	4.1	100	13.3
Cuba [HAV]	5																		-	-	-	-
Curacao [CUR]	40																		2	0.2	1	0.1
Haiti [PAP]																			1	0.1	5	0.7
St. Lucia [UVF]	2																		1	0.1	-	-
Trinidad [POS]																			1	0.1	-	-
European Ports																			-	-	3	0.4
Dusseldorf [DUS]																			-	-	107	14.3
Frankfurt [FRA]			334																334	34.2	142	18.9
Holland [AMS]		296																	296	30.3	13	1.7
London [LGW]						15				2									19	1.9	64	8.5
London [LHR]																			45	4.6	6	0.8
Munich [MUN]	45		17																17	1.7	6	0.8
Vienna [VIE]																			1	0.1	-	-
Zurich [ZUR]																			-	-	4	0.5
Other Ports																			-	-	-	-
Panama [PTY]																			1	0.1	-	-
<b>Total 2005</b>	<b>157</b>	<b>296</b>	<b>351</b>	<b>93</b>	<b>29</b>	<b>15</b>	<b>6</b>	<b>3</b>	<b>1</b>	<b>5</b>	<b>2</b>	<b>7</b>	<b>6</b>	<b>1</b>	<b>0</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>976</b>	<b>100.0</b>	<b>750</b>	<b>100.0</b>
<b>% Share 2005</b>	<b>16.1</b>	<b>30.3</b>	<b>36.0</b>	<b>9.5</b>	<b>3.0</b>	<b>1.5</b>	<b>0.6</b>	<b>0.3</b>	<b>0.1</b>	<b>0.5</b>	<b>0.2</b>	<b>0.7</b>	<b>0.6</b>	<b>0.1</b>	<b>-</b>	<b>0.1</b>	<b>0.2</b>	<b>0.1</b>	<b>100.0</b>		<b>750</b>	
<b>Total 2004</b>	<b>214</b>	<b>142</b>	<b>113</b>	<b>86</b>	<b>20</b>	<b>12</b>	<b>11</b>	<b>9</b>	<b>4</b>	<b>5</b>	<b>5</b>	<b>3</b>	<b>2</b>	<b>2</b>	<b>1</b>	<b>1</b>	<b>2</b>	<b>1</b>	<b>750</b>		<b>1000</b>	
<b>% Share 2004</b>	<b>40.2</b>	<b>18.9</b>	<b>15.1</b>	<b>11.5</b>	<b>2.7</b>	<b>1.6</b>	<b>1.5</b>	<b>1.2</b>	<b>0.5</b>	<b>0.7</b>	<b>0.7</b>	<b>0.4</b>	<b>0.3</b>	<b>0.3</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>	<b>0.1</b>			<b>1000</b>	