WORLD TOURISM ALLIANCE | mastercard | Trip.com Group

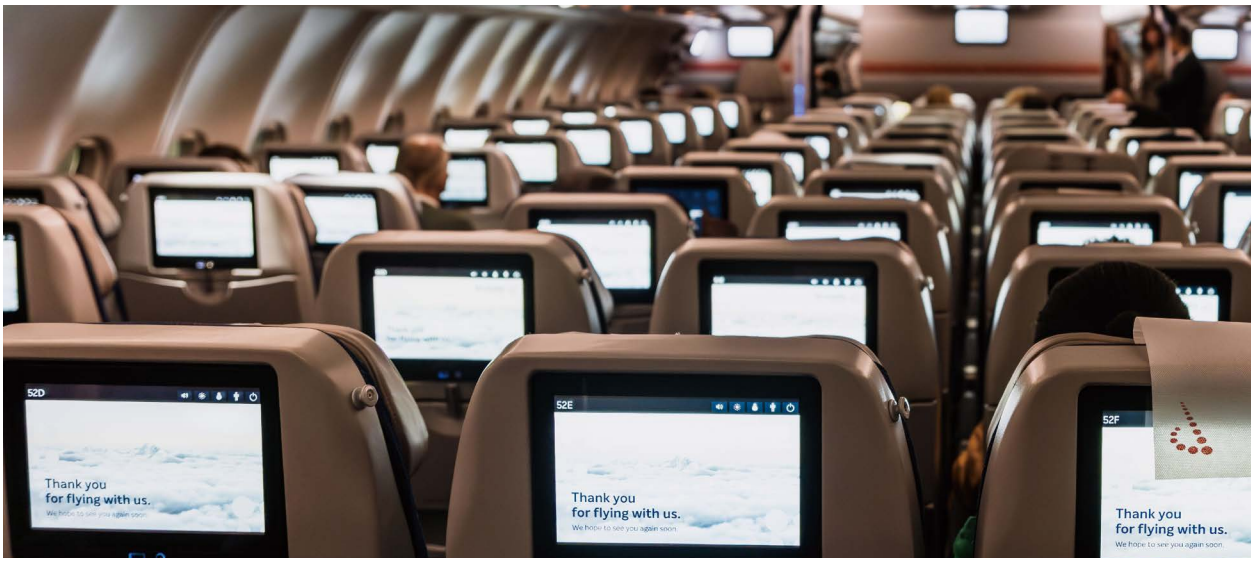
2025-2026 Cross-border Tourism Consumption Trends Report



This report is printed on environmentally friendly paper

2025-2026 Cross-border Tourism Consumption Trends Report

WORLD TOURISM ALLIANCE | mastercard | Trip.com Group™

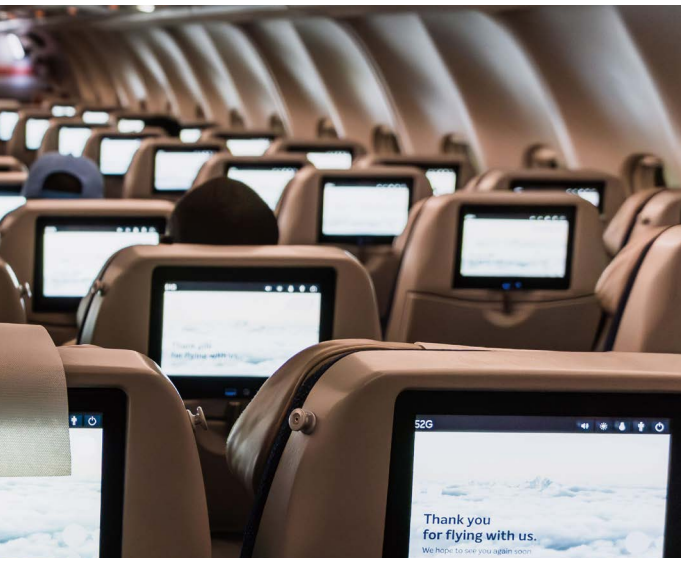


Foreword /

The 2025-2026 Cross-Border Travel Consumption Trends Report is jointly released by the World Tourism Alliance, Mastercard and Trip.com Group. Taking a global view with a focus on China, and drawing on robust data sources such as Mastercard's consumption insights and Trip.com's outbound and inbound booking data, the report examines overall consumption trends in global tourism and in China's outbound and inbound travel, aiming to provide a reference for the high-quality development of the global tourism industry. Since its first release in July 2024, the series has drawn wide attention both within and beyond the tourism industry. From July to October 2026, the report team carefully researched and consolidated the new trends and changes from Q3 2025 to the end of Q2 2026, culminating in this report.

From Q3 2025 to the end of Q2 2026, the global tourism industry shifted from the rebound-driven recovery of the previous two years to normalized growth. In 2025, international tourist arrivals exceeded 1.5 billion and international tourism receipts hit a record high, yet regional divergence was pronounced: Europe and Africa grew steadily, Asia-Pacific was still recovering, and the Middle East declined amid geopolitical tensions, diverting traffic to alternative hubs in Asia-Pacific and Europe. Meanwhile, experiential consumption remained the growth engine, while visa facilitation, the recovery of international flight capacity and the widespread adoption of AI together formed new drivers of this round of global tourism growth.

Outbound travel: Trips and overseas spending by Chinese mainland travelers kept growing steadily. Popular destinations remained concentrated in long-haul Europe and the Americas and short-haul Asian



markets, while emerging and experience-led destinations such as Brazil, South Africa, Portugal, Türkiye and Iceland rapidly gained popularity. Visa policy changes, major sporting and performance events, safety expectations and social media together reshaped the destination landscape; booking behavior diverged, with "long holidays locked in early, short breaks decided flexibly." The focus of spending shifted from shopping to experiences; independent travel, small-group customized tours and fragmented bookings grew rapidly, making travel and leisure services a high-potential source of incremental spending beyond retail and dining.

Inbound travel: Visa-free policies continued to expand, making visa-free entry the mainstream way for foreign visitors to come to China, and inbound arrivals kept growing rapidly. The source-market mix continued to improve: Europe and the Americas recovered faster to become the main growth engine, Southeast Asia's dividend continued to materialize, and Northeast Asia entered a phase of normalized development. Inbound destinations are spreading from gateway cities to distinctive cities and "capillary" destinations, with Chongqing, Zhangjiajie, Harbin, Guilin and Jiaxing seeing notable gains in popularity. Spending became more diversified, with shopping emerging as a high-share, high-growth segment; "instant tax refund upon purchase" and payment facilitation continued to advance, the share of ATM cash withdrawals declined, and inbound payment is moving from "convenience" to "diversity."

This report adds a dedicated chapter on new forms of tourism in the AI era, examining the opportunities and the "trustworthiness" challenges AI brings across traveler decision-making, the in-trip experience and the industry's supply-side ecosystem. It also provides in-depth analysis of popular destinations and events at home and abroad, including the FIFA World Cup in the US, Canada and Mexico, France, Brazil, Beijing, Hangzhou and Hainan, as references for other destinations. In addition, the report continues to focus on sustainable and responsible travel, observing issues such as the living cultural heritage, balancing host-guest relations, green and low-carbon development, and cross-border data compliance, and offers recommendations and outlooks for outbound, inbound and sustainable cross-border travel.

*** This report is fully supported by the technical expertise of Mastercard's Advisors & Consulting Services department**

Table of Contents

2025-2026
Cross-border Tourism Consumption
Trends Report



Chapter 1 | Global Tourism Industry Overview 06
1.1 Global Tourism at a Glance 07
1.2 Global Cross-Border Travel Market and Changes 09
1.3 Global Cross-Border Travel Bookings and Payments 14
Chapter 2 | China Outbound Travel and Consumption Trends 17
2.1 Overall Outbound Travel Trends 18
2.2 Popular Outbound Destinations 19
2.3 Changes in Outbound Booking Behavior 22
2.4 Trends in Outbound Traveler Spending Behavior 25
Chapter 3 | China Inbound Travel and Consumption Trends 29
3.1 Inbound Travelers' Profile and Origins 30
3.2 Inbound Traveler Product Bookings 33
3.3 Inbound Spending Structure and Payment Behavior 36
Chapter 4 | New Forms of Tourism in the AI Era 42
4.1 AI-Driven Traveler Decisions and Experiences 43
4.2 AI Reshaping the Tourism Supply Side 48
4.3 Risks and Challenges of Cross-Border AI 50
Chapter 5 | Case Studies of Popular Destinations 52
5.1 Popular Outbound Tourism Destinations 53
5.2 Popular Inbound Tourism Destinations 59
Chapter 6 | Recommendations for Cross-Border Travel Development 67
6.1 Outbound Travel Risks and Challenges 68
6.2 Inbound Travel Risks and Challenges 71
6.3 Sustainable Cross-Border Travel: Observations and Reflections 74
6.4 Recommendations and Outlook 77
Contributors to the Cross-border Tourism Consumption Trends 2025-2026 80

Chapter 1

Global Tourism Industry Overview



1.1
Global Tourism at a Glance

Global tourism remains broadly stable despite geopolitical headwinds

According to UN Tourism1, international arrivals reached 1.544 billion in 2025 (+4.7% YoY), while total international tourism export revenues hit a record US$2.2 trillion. About 690 million international trips were made in H1 2026 (+0.4% YoY); full-year 2026 arrivals are expected to grow by about 1-2% over 2025. Since 2025, arrivals and spending have surpassed 2019 levels.



H1 2026 YoY growth



2025 international tourism export revenues

Amid heightened geopolitical uncertainties and mounting global economic pressures, the tourism industry continues to face headwinds, while overall travel demand remains resilient. Going forward, the global tourism sector will continue to drive economic growth, benefiting from flight recovery, AI adoption, and a more open and supportive policy environment.

Air capacity recovers; global passenger traffic may hit a record in 2026, despite geopolitical impacts

Global air travel has fully recovered and entered structural growth. Per IATA, 2025 passenger demand (RPK) rose 5.3% YoY; international demand grew 7.1%, capacity 6.8%, and the international load factor hit a record 83.5%. According to IATA's report in June 2026, global passengers may still grow 2.1% YoY, the Middle East faces a deep contraction, while Africa and Asia Pacific grow thanks to traffic rerouting.

AI in global tourism

Per Mastercard Economics Institute's 2026 report The New Travel Equation, about 64% of travelers globally use AI tools to pick destinations, compare prices and optimize itineraries. AI subscribers spend a larger share of wallet on travel (especially lodging) and seek "hidden destinations" matching their interests in four clusters: culture & history, food & wine, sports, and beaches. Destinations now compete as searchable, comparable, personal experiences, not points on a map.

Visa-free access expands; Chinese outbound travel brings new opportunities to destinations

As of August 2026, 42 destinations provide visa-free entry for travelers with Chinese passports, plus 46 with visa on arrival. The network now reaches beyond Southeast Asia to Central Asia, the Caucasus, the Middle East, Africa and Latin America; in 2026, Brazil, Russia, Türkiye and the Philippines, among others, offered visa-free entry to Chinese passports[2]. Lower visa barriers spur independent, multi-country and long-haul immersive travel, diversifying outbound destinations.

Facilitation takes effect; China inbound travel gives strong momentum to global tourism

Under China's *15th Five-Year Plan for Building a Strong Tourism Country*, inbound tourism is expected to reach 190 million trips and over US$150 billion in spending by 2030. China keeps expanding visa-free entry and easing payment, telecoms, lodging, ticketing, booking and guiding for visitors, e.g., foreign cards in mobile payment, foreign bank cards acceptance, passport-based station entry and "one-click tax refunds." A network of key inbound cities and tailored cultural, study and shopping products aims to turn "easy entry" into immersive, multi-scenario spending.

***Data Source:**

1. UN Tourism;
2. Passport Index;

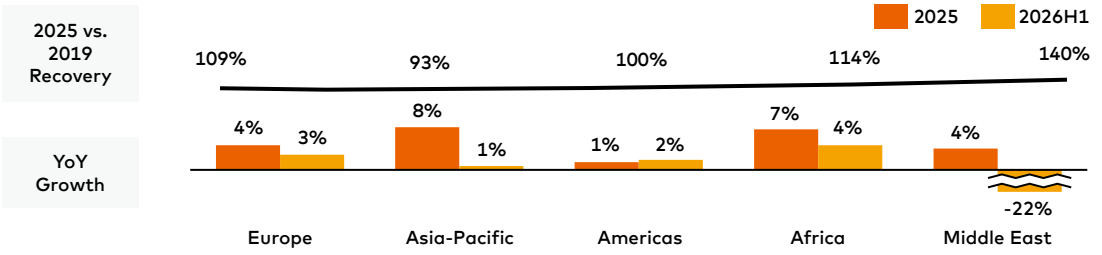
1.2 Global Cross-Border Travel Market and Changes

Resilient demand: from broad rebound to structural growth

In 2025, international arrivals reached 1.544 billion, up about 4.7% YoY and surpassing the 2019 level by approximately 65 million; international tourism exports hit a record US$2.2 trillion. Growth momentum has shifted from "recovery rebound" to "normalized growth", but regional divergence in demand has deepened markedly.

Europe and Africa performed most steadily. Europe, with its mature resources, holds over half of the global share, while Africa led all regions with high growth in both 2025 and H1 2026. The Middle East swung sharply after strong growth: directly hit by geopolitical conflict, its inbound arrivals in H1 2026 fell 22%, and the impact spilled over to distant markets: many Europe–Asia routes transit through Middle East airspace, where disruptions pushed up flight times and costs between Europe and Asia-Pacific. Asia-Pacific experienced a slower pace of lifting travel restrictions following 2019. Combining all these external shocks, Asia was the only region that had not yet returned to its 2019 tourism levels, with its international arrivals gap versus the same period of 2019 widening from 7% in 2025 to 11% in H1 2026.

International Arrivals[1] Growth by Region, 2025 and H1 2026

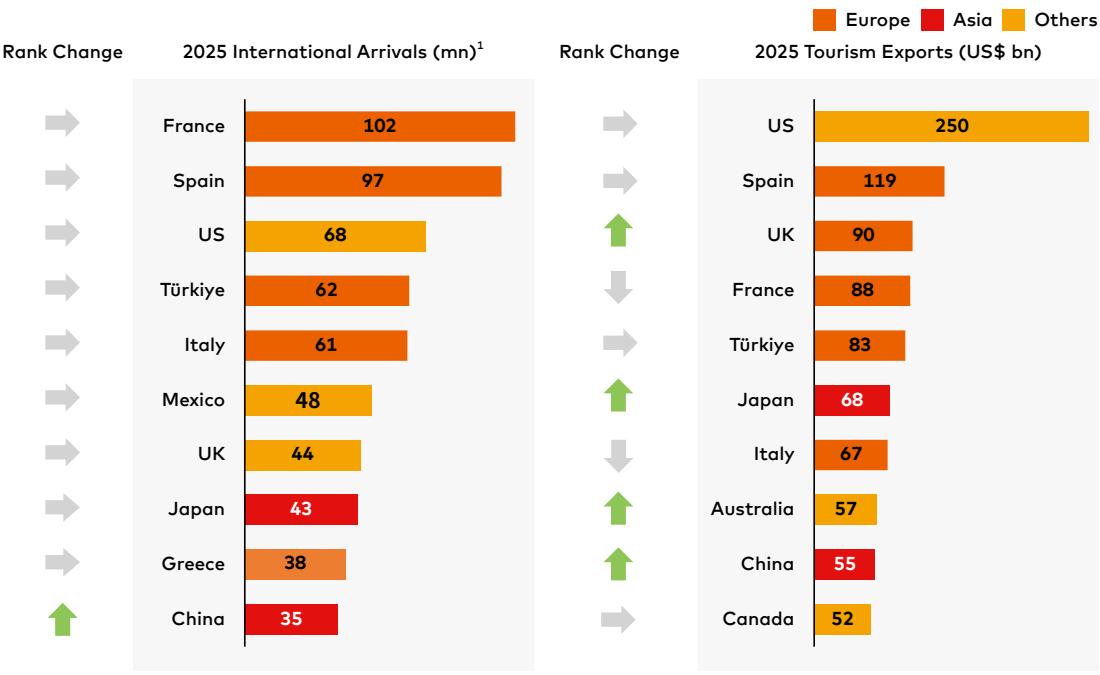


*Data Source: UN Tourism

Destination rankings by arrivals and by actual revenue diverge. France and Spain each draw close to 100 million visitors, firmly anchoring global visitor flows; the US leads by a wide margin with US$250 billion in tourism exports, showing a very high spend per visitor. Notably, the UK, Australia and China rose markedly in the revenue rankings, with China entering the top 10 in both international arrivals and tourism revenue, achieving growth in both volume and revenue. The international tourism market is shifting from "competing on visitor numbers"

to "competing for high-spending travelers", and leading mature markets are upgrading at a faster pace.

Top 10 Destinations by Country, 2025



*Data Source: UN Tourism

Geopolitical conflict reshapes the regional landscape of global tourism: Middle East traffic declines and spills over to Asia-Pacific and Europe

According to data released by UN Tourism, Middle East international arrivals in 2025 grew 4% YoY and exceeded 2019 levels by 40%, making it the fastest-recovering region globally that



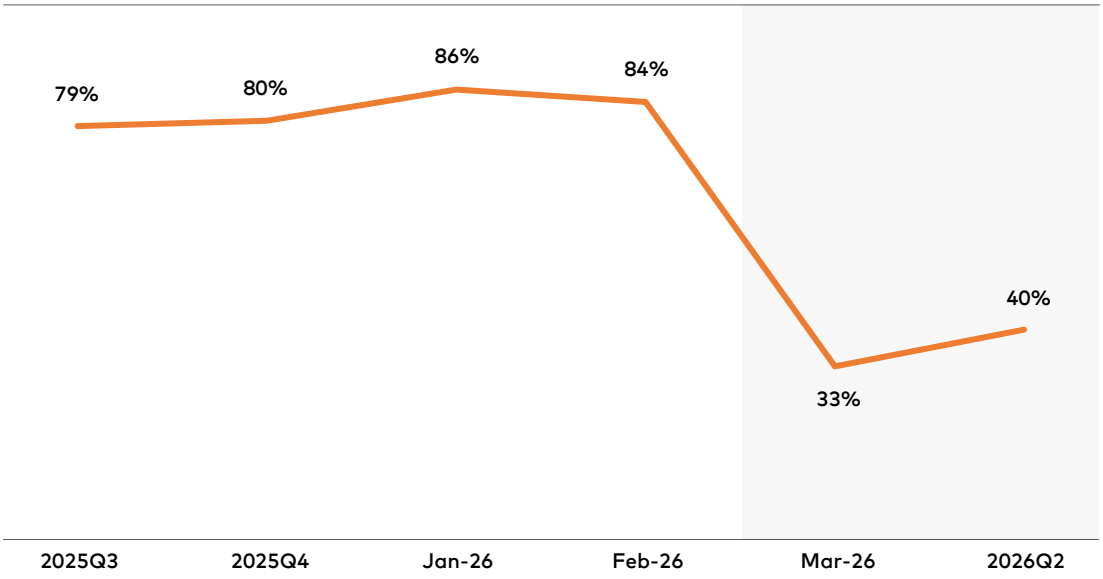


year, with Lebanon and Israel once the fastest-growing destinations in the world. However, affected by geopolitical events, arrivals in H1 2026 turned to a YoY decline of 22%.

The impact of geopolitical conflicts on tourism is mainly transmitted through the aviation sector: the Middle East accounts for about 9.5% of global air passenger traffic, yet handles over 40% of global transfer traffic. International Air Transport Association (IATA) data show that in Q1 2026, Middle East international air passenger traffic fell 16% YoY, with March down as much as 61%.

Middle East accommodation also came under pressure: data from hospitality analytics firm STR show that average hotel occupancy in Dubai fell from 84.8% in January–February 2026 to about 33% in March, while the UAE overall stood at 36.2% in March. Mastercard has

Dubai Hotel Occupancy Data



*Data Source: Dubai Department of Economy and Tourism (DET), STR data

also observed alternative transit hubs emerging in Asia-Pacific and parts of Europe: Paris ranked first globally in YoY growth of scheduled international seats for June–September, and passenger traffic rose significantly at Asian hubs such as Vietnam and South Korea. Demand "squeezed out" of the Middle East has spilled over, objectively supporting growth in parts of the Northeast Asian/Southeast Asian markets.

Visa facilitation and infrastructure improvements drive Africa's international tourism growth

Africa's international arrivals grew 7% YoY in 2025 and 4% YoY in H1 2026, both among the highest of all regions, driven mainly by intra-African travel: in South Africa, the largest destination in Sub-Saharan Africa, over 70% of international visitors come from within Africa.

On the policy side, visa policies across many African destinations have opened up significantly: Ghana has offered visa-free entry to all Africans since 2025, Kenya grants visa-free entry to 52 African countries, and the share of visa-free intra-African travel has risen to a record high of 28%. On the aviation side, the "Free Route Airspace" (FRA) led by the African Airlines Association (AFRAA) took effect in West and Central African airspace on October 30, 2025, with six African airlines approved to operate user-preferred routes covering 30 core city pairs. Under the Single African Air Transport Market (SAATM) framework, 113 African airlines now operate a network of 124 intra-African routes, and the passenger share of multi-stop cross-border routes within Africa has risen to 23%.



AI reshapes "discovery": emerging and niche destinations see explosive growth

AI tools are helping travelers discover niche destinations and get better value — a UN Tourism survey shows that 37% of industry practitioners rank "using AI and other technologies during trips" and 26% rank "exploring niche destinations" among 2026 consumer trends. At the destination level, this shows up as the accelerating rise of emerging and niche markets: among the global Top 10 countries and regions by arrivals growth in 2025 and H1 2026, niche destinations such as El Salvador, Paraguay and Vanuatu sustained growth of over 30%. Mastercard Economics Institute transaction data further confirm the direct role of AI in helping destinations "break out": high-growth destinations identified by AI cluster in four experience types (culture & history, food & wine, sports, and beaches), with 31% of visitor spending in Leipzig, Germany and 23% in Orvieto, Italy driven by AI subscribers. For travel and hotel businesses, this means AI is playing an increasingly important role in deepening personalized traveler services and helping niche destinations "get discovered".

Top 10 Destinations by International Arrivals Growth

H1 2026

#	Market	YoY	Region
1	N. Caledonia	41%	APAC
2	El Salvador	37%	Americas
3	Paraguay	34%	Americas
4	Guadeloupe	33%	Americas
5	Bhutan	31%	APAC
6	Vanuatu	30%	APAC
7	Palau	29%	APAC
8	Uzbekistan	25%	Europe
9	Brunei	23%	APAC
10	South Korea	21%	APAC

2025

Market	YoY	Region
Paraguay	91%	Americas
Vanuatu	62%	APAC
Lebanon	45%	Mid-East
Brazil	37%	Americas
Israel	37%	Mid-East
Bhutan	31%	APAC
Angola	28%	Africa
Palau	28%	APAC
Guyana	22%	Americas
Vietnam	21%	APAC

*Data Source: UN Tourism

***Note:**

1. As UN Tourism has not yet released 2025 arrivals data for France, the UK and China, official national data are used instead: France (Atout France), 102 million; UK (VisitBritain forecast), 43.6 million; China (NBS & MOFCOM, inbound foreign visitors), 35.17 million.

1.3 Global Cross-Border Travel Bookings and Payments

Air Ticket Bookings: Demand Keeps Recovering; Booking Windows Shorten but Decisions Grow More Cautious

According to data released by commerce media platform Criteo, global air ticket bookings grew 8% YoY in Q1 2026 and revenue grew 10%, with the Americas leading booking growth at 17%. Although demand for air ticket bookings continued its strong recovery, the conversion rate of air ticket booking ads rose only 1% over the same period. This mismatch shows that consumers are making more price comparisons and itinerary evaluations before booking flights, and their decisions are becoming more cautious. In terms of booking lead time, the global air ticket booking window has narrowed, shortening from 56.6 days in April 2025 to 52.7 days in April 2026, a YoY decrease of 7%.



+8%
Global air ticket bookings



+10%
Air ticket-related revenue



+17%
Americas air ticket bookings



52.7 days
Average booking lead time

Accommodation Bookings: Higher Room Rates Drive Growth; Online Booking Channels Keep Growing

In 2026, the global hotel market continued to recover, but growth came more from higher room rates than from higher occupancy. According to hospitality data company STR, in Q2 2026 European hotel revenue per available room (RevPAR) grew 1.4% and occupancy grew 0.5%; in the U.S., the average daily rate (ADR) of sold hotel rooms rose 1%, while occupancy dipped slightly to 62.1%.

Meanwhile, online accommodation booking platforms have maintained high growth. EU data show that in Q1 2026, nights spent in EU short-term rental accommodation booked through multiple international accommodation platforms grew 9.7% year-on-year, significantly higher than the 3.4% growth of the overall accommodation market. Consumers browse an average of 25 hotel options, with a decision cycle of 11.5 days.

Experiential Consumption Remains a Key Growth Engine for Cross-Border Travel

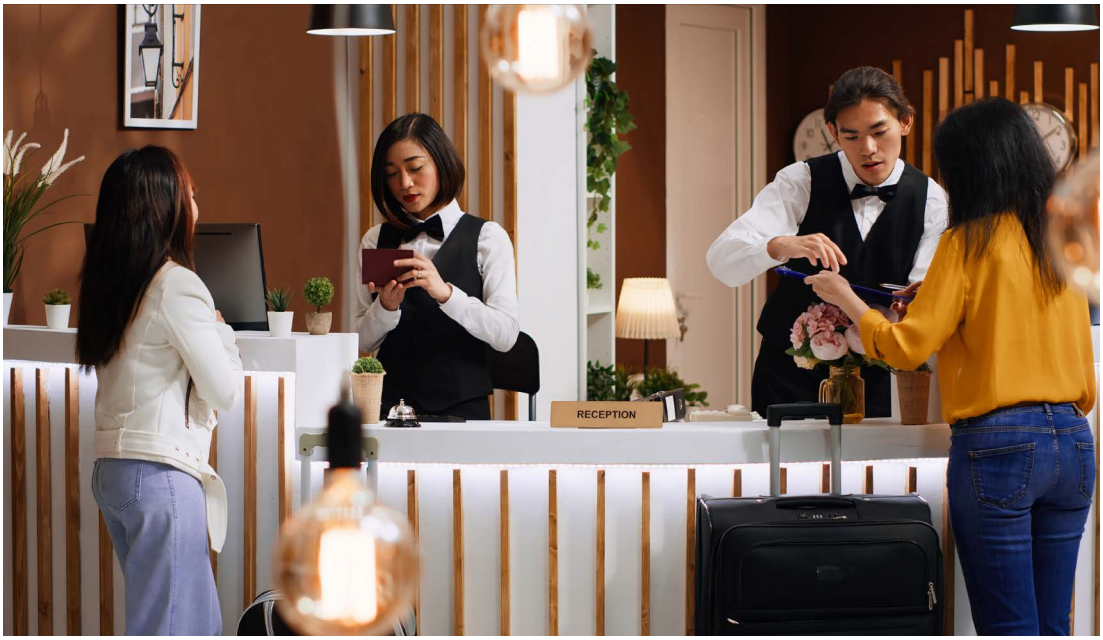
According to UN Tourism, experiential tourism, represented by sports, cultural and rural experiences, has for many consecutive years been an important component of cross-border tourism spending. Among these, sports tourism accounts for about 10% of global tourism expenditure, with a market size of US$672 billion in 2025, and its use cases continue to expand from watching major sporting events to outdoor sports and fan experiences. Meanwhile, UN Tourism's "Best Tourism Villages" network now covers 319 rural destinations in 65 countries, and cultural, rural and community experiences have become an important direction for tourism product innovation.

Overall, the experience-oriented upgrade of tourism consumption has become a long-term trend in the global tourism market in recent years: traveler demand continues to shift from standardized travel services toward consumption scenarios with stronger participation, immersion and personalization, and the importance of content operations and scenario innovation keeps rising.

Consumer Demand for Diverse Payment Methods Continues to Grow

In recent years, tap-and-go, real-time payments and various local alternative payment methods (APMs) have spread rapidly and are becoming an important part of global travel and retail payments.

As consumers' expectations for convenient and secure payment experiences keep rising, contactless payment has expanded from traditional offline retail to scenarios such as public



transport, cross-border travel and everyday financial services, and is gradually becoming a payment method frequently used by international travelers. In 2025, contactless payments accounted for more than 75% of transactions on Mastercard's global network, reflecting that contactless tapping (tap-and-go) is gradually becoming a payment habit for consumers worldwide.

Flexible Payment Methods Are Rapidly Penetrating Travel Consumption Scenarios

According to a report by payments company Worldpay, online Buy Now, Pay Later (BNPL) transaction volume grew from less than US$3 billion in 2014 to US$342 billion in 2024, and is expected to keep growing. Many international OTA platforms, airlines and other travel-related businesses have introduced flexible payment services such as BNPL, installment payments and deferred payments to reduce consumers' pressure of one-lump-sum payment. Travel payment is shifting from "one-time payment" to "flexible payment", and budget management capability has become an important factor influencing consumer decisions.



Chapter 2

China Outbound Travel and Consumption Trends



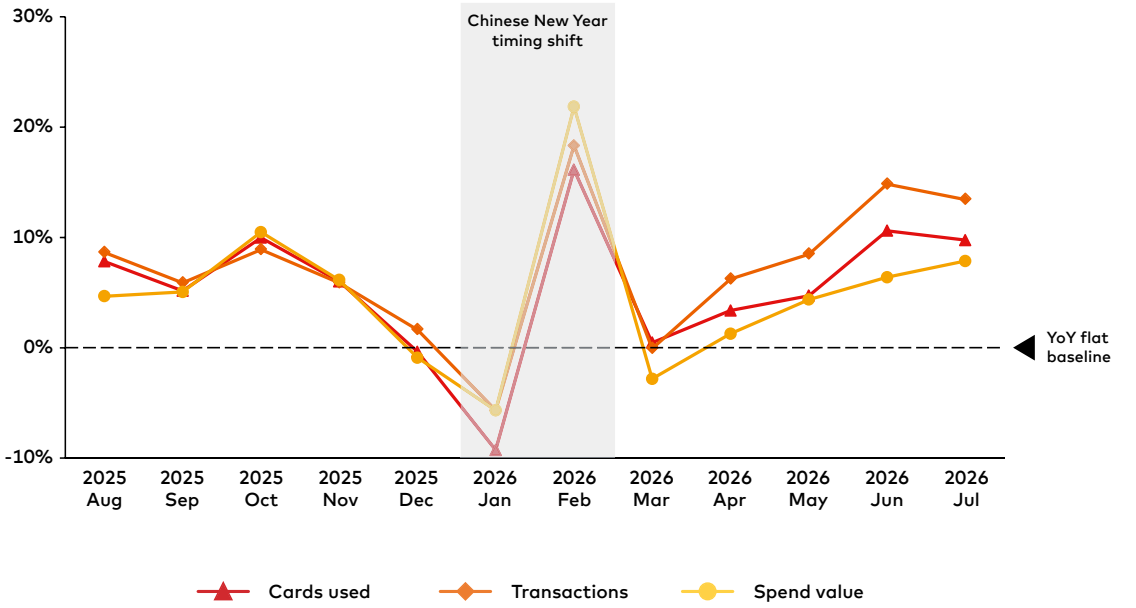
2.1 Overall Outbound Travel Trends

Rising Outbound Traveler Flows Drive Steady Market Expansion

From Q3 2025 to Q2 2026, Chinese mainland's outbound travel entered a phase of steady growth. According to the China Tourism Academy's Annual Report on China's Outbound Tourism Development 2025-2026, Chinese residents made about 168 million outbound trips in 2025, or roughly one trip for every 10 citizens. Sustained growth in cross-border traveler flows has laid a solid foundation for market expansion, moving the outbound travel market into a stage of high-level operation and steady growth.

Growing traveler flows continue to translate into spending, with offline spending by Chinese outbound travelers growing overall. Although the shifted Chinese New Year holiday weighed on YoY growth in January 2026, concentrated holiday travel demand pushed YoY growth in overseas offline spending value and frequency to a periodic high in February, and growth continued into Q2, showing strong momentum and potential.

YoY Change in Offline Spending by Chinese Outbound Travelers



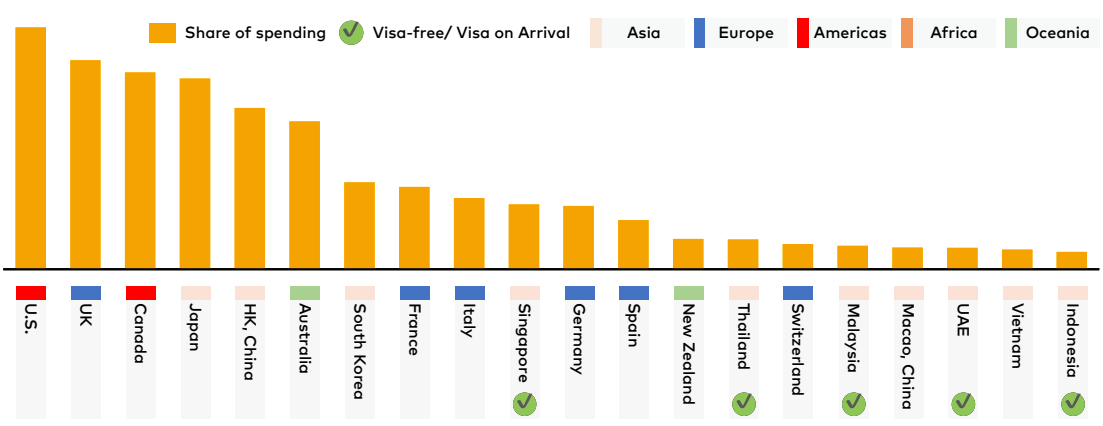
*Data Source: Mastercard Insights

2.2 Popular Outbound Destinations

Spending Concentrates in Europe, the Americas and Nearby Asia

From Q3 2025 to Q2 2026, Chinese outbound spending was concentrated in Europe, the Americas and Asia, led by the U.S., the UK and Canada. Of the Top 20 destinations by spending, 8 are in Europe and the Americas and 10 in Asia, so long-haul Western trips and short-haul Asian trips form the market's core. In addition, visa-free destinations such as Singapore, Thailand, and Malaysia have seen strong travel demand from Chinese consumers. Continued visa facilitation measures are expected to further stimulate regional travel and unlock additional tourism spending.

Top Destinations by Spending



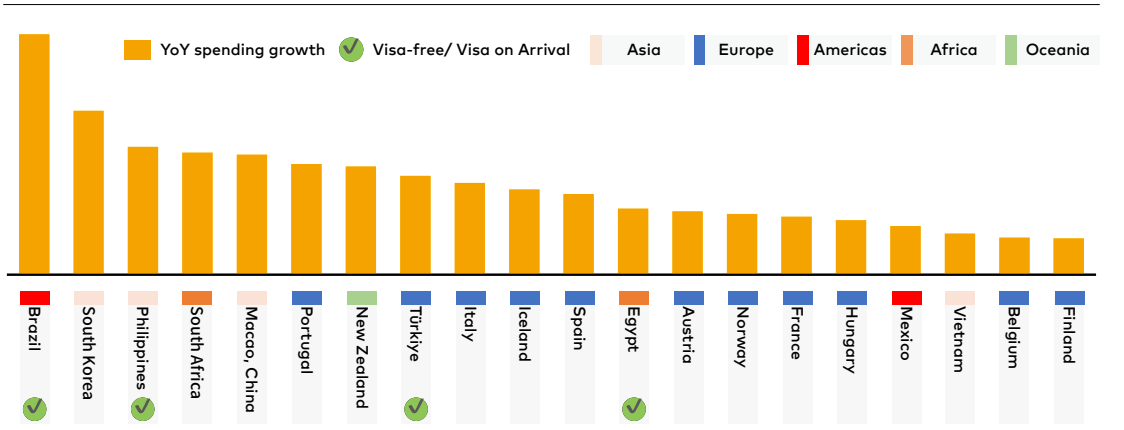
*Data Source: Mastercard Insights



Emerging and Experiential Destinations Keep Gaining Popularity

From Q3 2025 to Q2 2026, interest kept spreading from traditional markets to emerging and experiential destinations. Long-haul destinations such as Brazil and South Africa gained popularity, and high-growth destinations clustered in Europe (Portugal, Türkiye, Italy, Iceland, etc.). Chinese travelers' choices are diversifying, shifting from sightseeing toward nature, culture and niche in-depth travel.

Fastest-Growing Destinations by Spending



*Data Source: Mastercard Insights

Multiple Factors Reshape the Outbound Destination Landscape

China's outbound travel market is shaped by visa policy, cultural and tourism events, safety expectations and social media. Together, these internal and external factors are redistributing traveler flows between established and emerging destinations.

- **Visa Policy Changes**

Visa policy changes alter travel costs and decision thresholds, continuously shaping where Chinese travelers go. Thailand and Singapore have each signed mutual visa exemption agreements with China, boosting demand for short-haul independent and weekend trips. Brazil introduced a time-limited visa exemption for Chinese travelers in May 2026, sharply lowering the barrier to visiting and raising the appeal of South American leisure, business and MICE travel.

- **Booming Cultural and Tourism Events**

Major sporting events, concerts and other cultural and tourism events can rapidly raise a destination's profile and visitor numbers, drawing concentrated flows of high-spending travelers. During the FIFA World Cup 2026 in the U.S., Canada and Mexico, demand for match-going, business hospitality and high-end travel in North America rose. Given the high cost of



long-haul travel, most visitors combine matches with city sightseeing, shopping and self-drive trips, lifting overall travel spending and temporarily heating up North American destinations. Meanwhile, the Singapore F1 Grand Prix has evolved into a major cultural and tourism IP blending racing, concerts and urban entertainment. During race week, visitor arrivals to Singapore rise by about 25% and visitor spending by about 45%. South Korea continues to attract international visitors through the fan economy driven by K-pop.

- **Safety Expectations and Risk Perception**

Safety and geopolitical factors change travelers' judgments about a destination's stability, controllability and risk costs, which in turn affect booking decisions. Geopolitical tensions, border conflicts, travel advisories and natural disasters dampen travel intentions and shift demand to alternative markets. For example, tensions on the Thailand-Cambodia border and travel advisories for some areas have hit combined Thailand-Cambodia tours and cross-border routes. Although core destinations such as Bangkok and Phuket operate normally, some travelers choosing Southeast Asia may now favor Singapore, Malaysia or Vietnam. Similarly, the Russia-Ukraine conflict continues to weigh on Eastern European destinations, and uncertainty in the Middle East may curb some long-haul in-depth travel demand.

- **Social Media Influence**

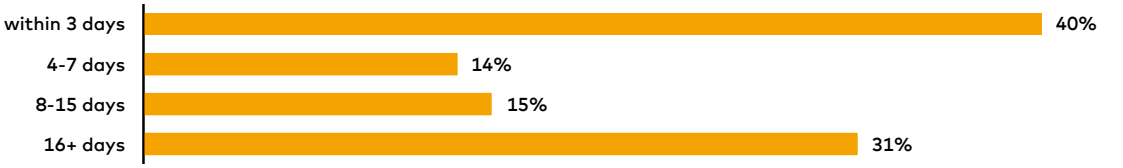
Social media is profoundly changing how Chinese travelers discover outbound destinations. Rather than relying on travel agencies, OTA rankings or search engines, more travelers now seek inspiration on social media, treating real user posts, KOL(influencer) content and short-video experiences as key references. Research by a leading short-video platform1 shows that 83% of Chinese outbound travelers discover destinations through social media, with Douyin(TikTok), Xiaohongshu(RedNote) and WeChat all major sources of inspiration. Social media lowers the information barrier for emerging destinations, bringing non-traditional places such as Central Asia, the Caucasus, the Middle East, Iceland and New Zealand into view. It also amplifies the appeal of specific scenes and experiences: travelers no longer choose just "a country", but a photo spot, concert, theme park, hotel, snow-mountain train, the northern lights or a road trip.

2.3 Changes in Outbound Booking Behavior

Outbound travel bookings are shifting earlier overall, with advance planning for long holidays and more flexible decisions for shorter breaks

According to Trip.com Group data, 31.4% of outbound travel in H1 2026 were booked 16+ days in advance, reaching a three-year high. Meanwhile, 39.5% were booked within three days of departure, reaching a three-year low. Overall, the outbound booking cycles are gradually shifting toward planning more than two weeks ahead.

Distribution of Booking Lead Times



*Data Source: Trip.com Group, from Jan 2026 to Jun 2026

Meanwhile, Mastercard Insights show that Chinese consumers still tend to plan ahead for long holidays, while booking patterns vary across peak seasons. For the National Day holiday, long-haul trips typically require bookings 1–2 months in advance. Online outbound travel spending grew 4.7% YoY in August and 8.4% YoY in September, followed by 10.5% growth in overseas offline spending in October, indicating a clear "book ahead, travel during the holiday" pattern. Summer travel shows a similar trend: online booking spend grew 8.5% YoY in June, the strongest growth outside the Chinese New Year period, reflecting early planning for summer trips such as family travel.

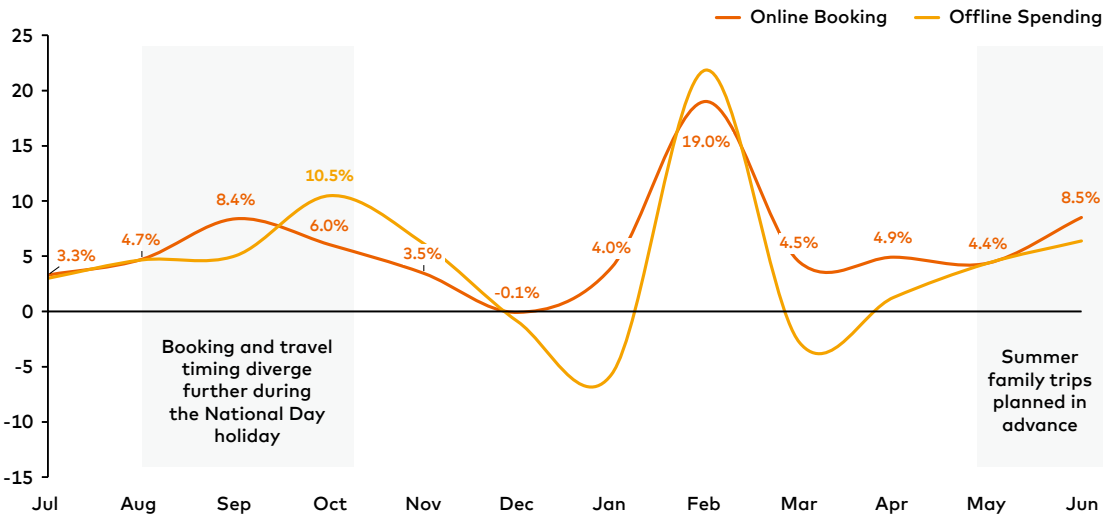
By contrast, shorter holidays tend to see more last-minute decisions. During Chinese New Year, as the holiday fell later in 2026 than in 2025, both online and offline spending grew by around 20% YoY in February, without a clear advance booking trend. Online booking growth ahead of the May Day holiday was also relatively moderate, with no strong sign of earlier peak-season bookings. This suggests that travelers may increasingly wait until closer to departure, depending on airfare and hotel prices, holiday schedules, and destination conditions.

Overall, consumers are not simply extending or shortening their booking cycles. Instead, they



are adjusting booking windows more flexibly based on holiday length and trip complexity, resulting in a clear pattern of "long holidays booked in advance, shorter holidays decided more flexibly".

China Outbound Travel: YoY Changes in Online Booking / Offline Spending



*Data Source: Mastercard Insights, from Jul 2025 to Jun 2026

Experience Economy Continues: Travelers Increasingly Value Experiences over Admission Tickets

As Chinese travelers gain more outbound travel experience, their expectations for travel quality and content continue to rise. Interest in sightseeing-only travel is declining, with travelers increasingly seeking to immerse themselves in local culture and lifestyles. Compared with admission tickets alone, experiences offering cultural interaction and personalized memories are becoming more popular. Trip.com Group data shows that travel experience products grew 69% YoY in 2025, far outpacing the



16% growth in attraction tickets. Experience products now account for over 40% of the platform’s attractions and activities business, reflecting rapidly growing demand for experiential travel and a continued shift from sightseeing to immersive experiences.

- **Local Culture & In-Depth Exploration: Continued Shift from Sightseeing to Experiences**

Traditional clothing experiences and travel photography are becoming important forms of cultural experience spending. Experiences such as wearing Hanbok at Gyeongbokgung Palace in Korea and traditional Thai dress at the Grand Palace in Thailand remain popular among Chinese travelers. Travelers are paying not only for costume rental and photography, but also for the opportunity to immerse themselves in local culture and create memorable, shareable travel content. As social media plays a growing role in travel decisions, photogenic and shareable travel photography products are gradually evolving from add-on services into a standalone travel category.

- **Food Experiences: From Tasting Local Cuisine to Experiencing Local Culture**

Food has become an important factor in Chinese travelers’ destination choices. Travelers actively search for local restaurant recommendations before departure and include food experiences in their itineraries. Booking.com data shows that 54% of Chinese travelers say food influences their destination choice, while 50% consider tasting local specialties a must-have travel experience. This indicates that food is shifting from a supporting travel expense to an important part of destination appeal. Beyond traditional dining, more travelers are seeking participatory food experiences, including local cooking classes, winery tastings, and dining experiences on cruises or buses. Compared with simply tasting local food, these experiences offer deeper insight into local culinary culture, history and lifestyles, meeting growing demand for cultural exploration and immersive travel.

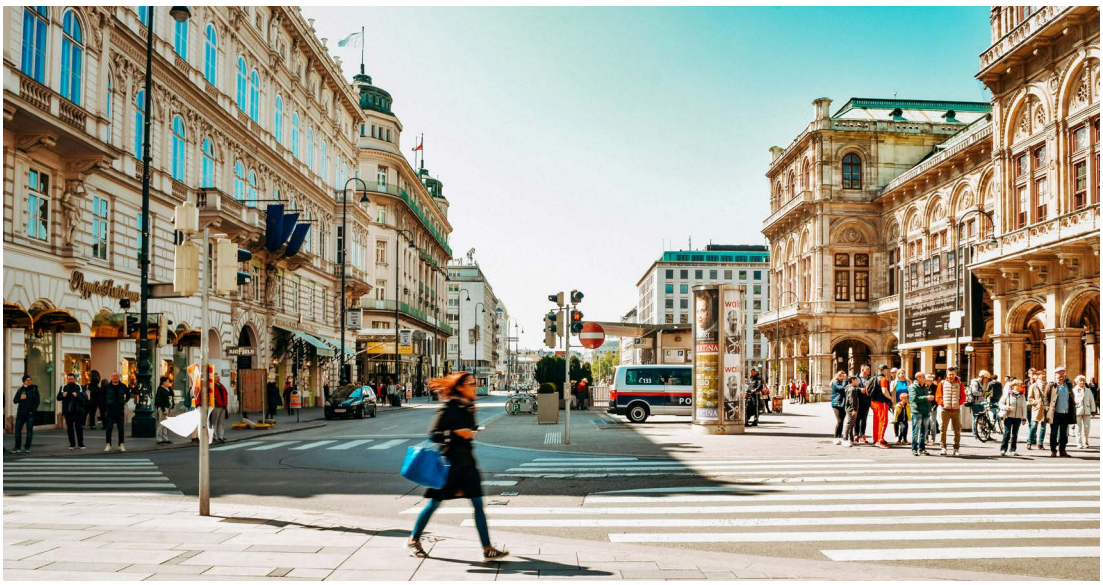
2.4 Trends in Outbound Traveler Spending Behavior

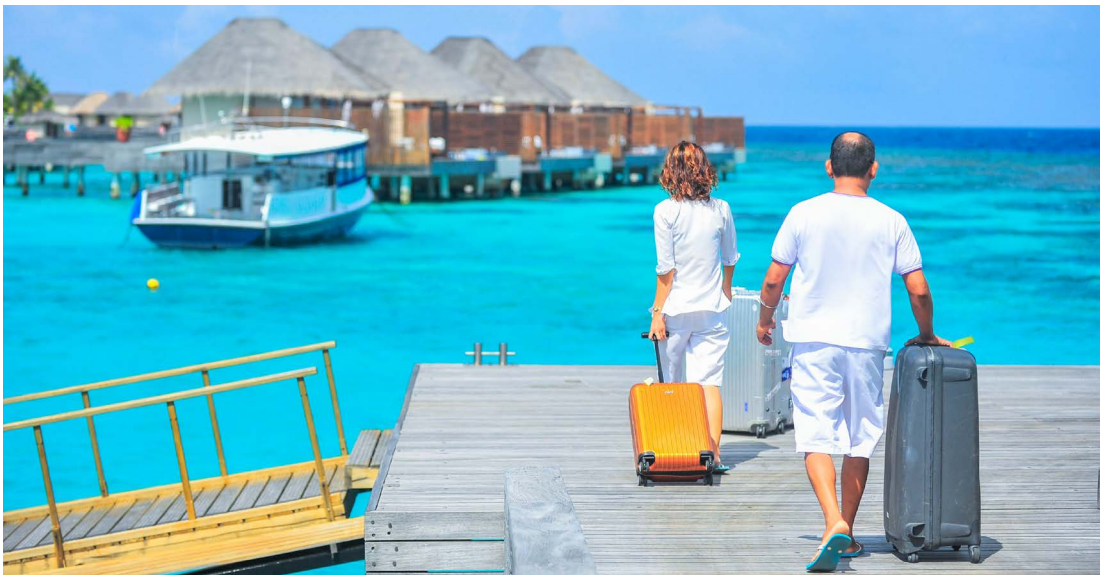
Increasing Outbound Travel Demand Drives Broad-Based Growth in Overseas Offline Spending

Mastercard Insights show that from Q3 2025 to the end of Q2 2026, overseas offline travel spending increased across major categories, supported by recovering outbound travel demand. The spending mix remained stable, with shopping and dining accounting for around 80% of total offline travel spending. The number of cards used in both categories continued to increase, while per-card spending remained stable, indicating that growth was mainly driven by broader consumer participation, while spending habits remained steady.

Accommodation and transportation spending both grew by around 1% YoY, remaining broadly stable. The number of cards used increased by over 5%, while per-card spending declined by more than 5% in both categories, indicating higher penetration, lower per-card spending and stable overall spending. Growth was therefore driven more by a broader consumer base, with demand becoming more diverse and segmented.

Travel and leisure services grew by around 4% YoY, outpacing accommodation and transportation. The number of cards used increased by around 8%, while per-card spending fell by around 4%. Growth was again driven by broader participation, but with a smaller decline in

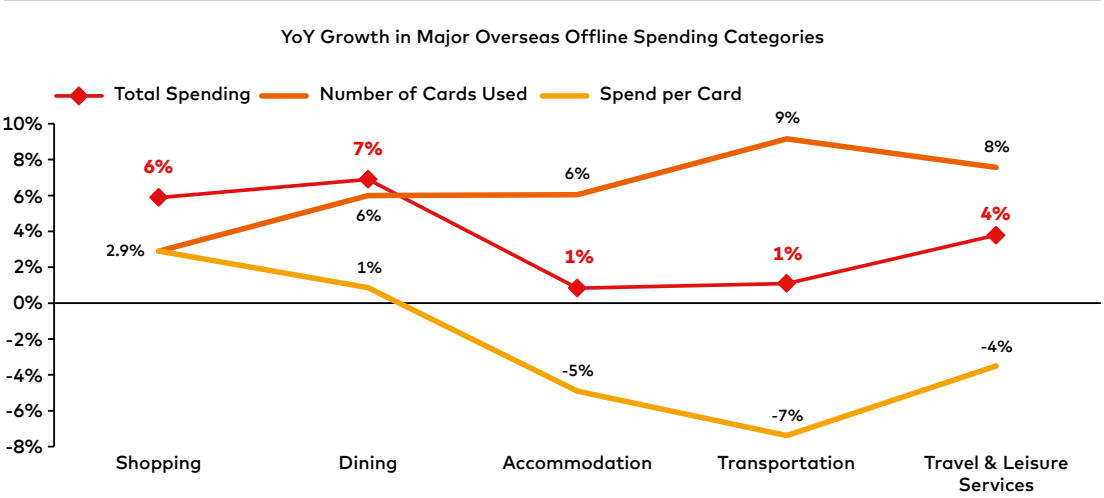




per-card spending. This suggests that travel and leisure services are benefiting not only from a larger traveler base, but also from relatively stronger spending demand. As outbound travel recovers, the category is emerging as a new growth area beyond shopping and dining, with demand for travel experiences and supporting services continuing to expand.

Overall, growth in overseas offline spending is mainly driven by a broader consumer base, with different categories showing distinct trends: shopping and dining remain the core spending categories, accommodation and transportation grow steadily with traveler volumes, while travel and leisure services show stronger momentum. The recovery in outbound travel is extending spending from shopping and dining into a wider range of travel-related categories.

Changes in Outbound Travel Spending by Category



*Data Source: Mastercard Insights, from Q3 2025 to Q2 2026

Spending Priorities Shift from Shopping to Experiences

Experiential value is increasingly replacing shopping as a key driver of outbound travel spending, a trend seen over the past two years. Travelers are allocating more of their limited budgets and time to experiences that offer emotional value, deeper engagement, and lasting memories. Outbound travel demand is moving from simply visiting and shopping, to exploring destinations and local culture. This shift from sightseeing to in-depth experiences is particularly evident among high-spending travelers. Cultural exploration, outdoor activities, themed travel, and premium customized products continue to gain popularity. Overall, outbound travel spending is becoming more experience-led, with culture, nature, local lifestyles, and unique experiences emerging as key sources of value.

This shift is also reshaping destination choices and travel decisions. Market research shows that relaxation and wellness, nature exploration, and cultural immersion have become mainstream travel motivations, while safety and the richness of tourism resources remain basic requirements. Beyond these fundamentals, cultural uniqueness, environmental quality, travel convenience, and experiences tailored to personal interests are becoming increasingly important. Beyond traditional sightseeing, concerts, sporting events, festivals, interest-based trips and local experiences are emerging as new travel triggers, particularly among younger travelers. Shopping remains an important part of outbound travel, but its role is gradually shifting from a primary purpose of travel to an extension of the overall travel experience. Consumers increasingly value brand stories, local characteristics, contextual experiences, and emotional value rather than price advantages alone. This suggests that travelers are moving from "being able to go" to "being worth the trip." Personalized, in-depth and content-rich experiences are increasingly shaping outbound travel decisions.

New Generation of Outbound Travelers Favors Independent and Flexible Travel

A new generation of outbound travelers is moving away from standard itineraries toward self-planned, flexible and on-demand travel. With more travel experience and easier access



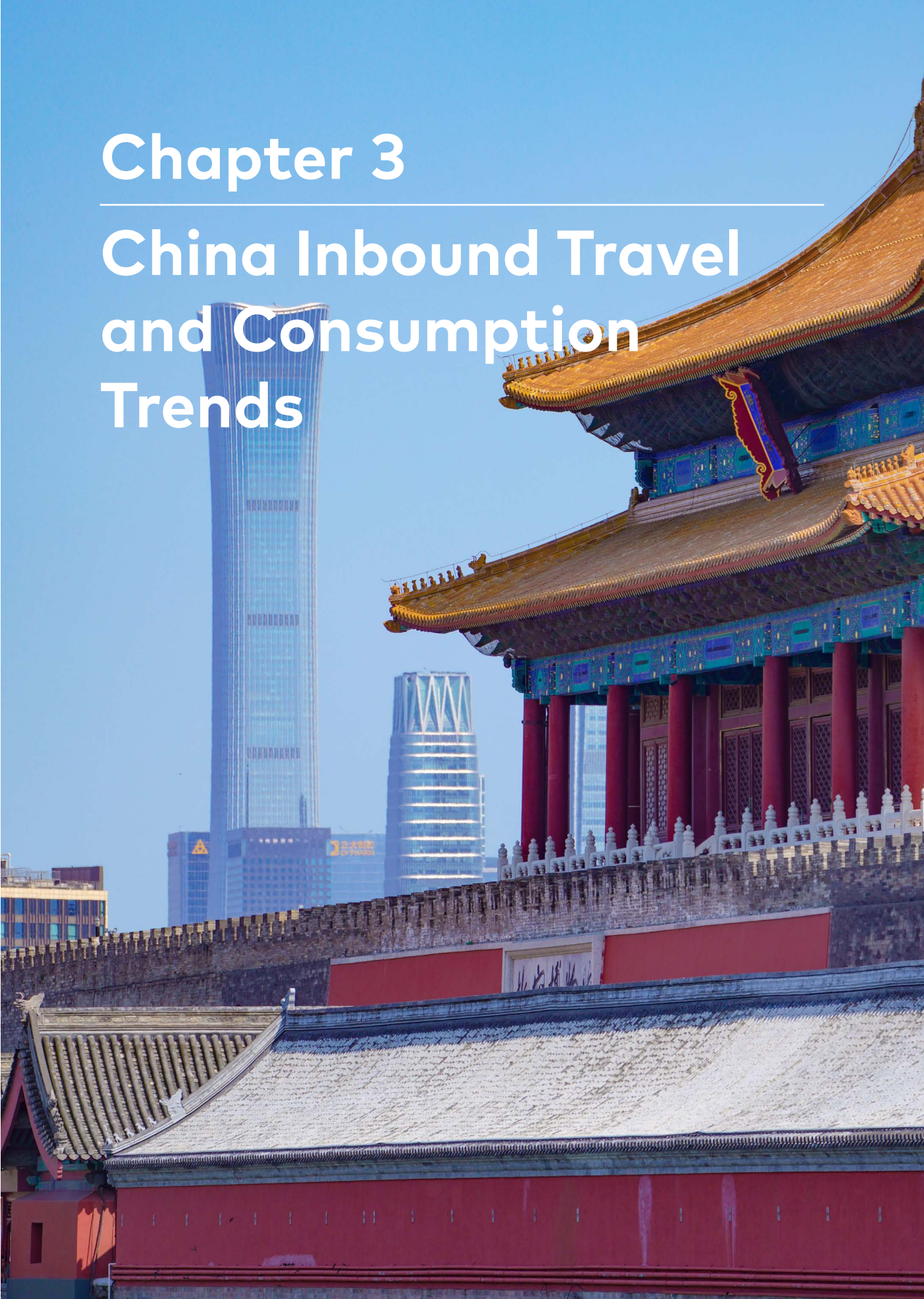


to information, travelers increasingly combine flights, accommodation, local experiences and activities based on their own interests and schedules. The China Inbound, Outbound and Domestic Tourism Market Sentiment Report for H1 2026 shows rapid growth in independent travel, semi-independent travel and unbundled bookings, while traditional all-inclusive tour packages continue to lose appeal. This trend is particularly evident in short-haul travel, where weekend and short-holiday getaways are becoming more spontaneous, creating greater demand for last-minute availability and booking flexibility.

This trend is particularly evident among younger and high-spending travelers. Younger travelers rely more on social media, OTA platforms and digital tools for trip planning, with travel decisions becoming more interest- and content-led rather than destination-led. High-value travelers place greater emphasis on independence, personalization and control over their travel experience, favoring independent travel, solo trips, customized small-group tours and interest-based experiences. Overall, travelers increasingly expect travel services to support their journeys rather than define the entire itinerary, making freedom of choice an important source of value.

Changes in demand are also reshaping the supply side. The market is gradually moving from standardized tour packages to modular services. Transfers, local guides, themed activities, attraction tickets, specialty dining and short excursions are offered as standalone services, creating a model of "essential services + flexible add-ons." At the same time, travel service providers are evolving from traditional guides and tour organizers into destination resource integrators, experience advisors and service coordinators, providing professional support when needed rather than managing the entire journey.

In the long term, competition among travel agencies and destination service providers will shift from selling package tours to building trusted, flexible and responsive service ecosystems. Digital platforms will play a greater role in improving product discovery, bundled booking, on-demand service fulfillment and personalized recommendations, better serving travelers' growing demand for independent, modular and experience-led travel.



Chapter 3

China Inbound Travel and Consumption Trends

3.1 Inbound Travelers' Profile and Origins

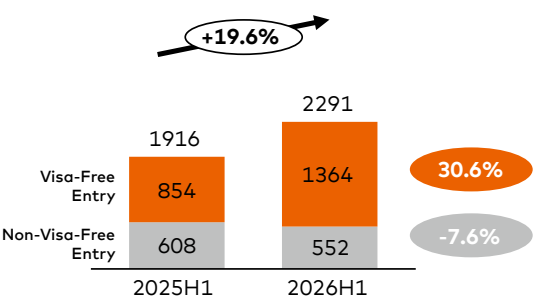
Inbound Tourism in China's Major Cities Saw Strong Growth in 2026

According to China's National Immigration Administration, China received around 22.91 million foreign visitors in H1 2026, of whom 17.81 million entered visa-free, accounting for 77.7% of the total. Visa-free arrivals grew 30.6% YoY, outpacing the 19.6% growth in overall foreign arrivals and becoming the mainstream of inbound tourism.

Since 2024, China has continued to expand its visa-free access and extend permitted stays. Services covering foreign visitors' entry, stay and departure have also improved, with greater convenience across payments, accommodation and transportation. These have facilitated international travel and economic cooperation, further strengthening foreign travelers' interest in visiting China.

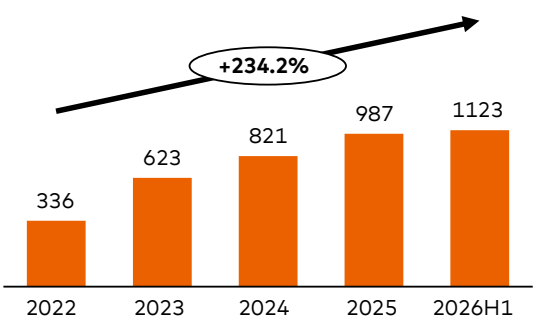
Inbound tourism continued to grow across major cities including Shanghai, Beijing, Shenzhen, Guangzhou, Chengdu and Chongqing. In H1 2026, Beijing received 3.27 million inbound visitors, up 32.6% YoY, including 2.79 million foreign visitors, up 36.7%. Shanghai received 5.31 million inbound visitors, up 27.82% YoY, including around 4.42 million foreign visitors, up 29.7%. Short-haul markets such as Malaysia and South Korea maintained strong growth. With further expansion of visa-free policies, greater convenience in payments, language services and transportation, and a growing range of cultural tourism, China is becoming increasingly attractive as an international travel destination.

Inbound Travel Volume / Visa-Free Entries (10,000 persons)



*Data Source: National Immigration Administration of the PRC

Number of Scheduled International Passenger Flights



*Data Source: Civil Aviation Administration of China

Based on online booking data from Trip.com Group, the primary source markets for China's inbound tourism in H1 2026 included Malaysia, Russia, South Korea, Thailand, the U.S., Singapore and Australia. All listed markets are covered by visa-free entry or visa-free transit policies, indicating that China's visa-free policies and improved entry facilitation have effectively supported inbound tourism.

Rankings and Trends of Inbound Foreign Visitors by Origin, Based on Estimated OTA Data, H1 2026

Top 8 Origin	Malaysia	Russia	South Korea	Thailand	United States	Singapore	Japan	Australia
H1 2026 Ranking	1	2	3	4	5	6	7	8
Ranking Changes vs. 2025	↑ Up 1	↑ Up 5	↓ Down 2	↑ Up 1	↓ Down 1	– No Change	↓ Down 5	↑ New

*Data Source: Trip.com Group, aggregated and anonymized data

Continuous Optimization and Upgrading of the Visa-Free Policy

China continues to refine its visa-free entry policies by expanding the list of visa-free countries, extending permitted stays, and improving regional policies. As of June 30, 2026, China had established unilateral or mutual visa exemption agreements with 79 countries. The visa-free transit policy now covers 55 countries, allowing eligible travelers with valid international travel documents and connecting tickets with confirmed seats to stay in China for up to 10 days, from 65 ports open for visa-free transit. Key policies are outlined below:

Policy	Applicable Countries	Stay Period	Activity Areas	Entry Ports
Entry Policy Nationals of specific countries entering China for the purpose of business, tourism, family or friends' visits, exchange and transit for no more than 30 days without visa	Unilateral visa-free entry - 50 countries: Europe (35), Oceania (2), Asia (7), Americas (6) Mutual visa-free entry - 29 countries: Asia (10)*, Europe (5), Africa (2), Americas (6), Oceania (5)	30 Days	All	All open ports
Transit Policy Foreign nationals holding valid international travel documents and connecting tickets to a third region through China	55 Countries: Asia (7), Europe (40), Oceania (2), Americas (6)	240 Hours (10 Days)	Permit to cross provincial boundaries within 24 eligible regions	65 ports

*Data Source: Ministry of Foreign Affairs of PRC, Chinese Visa Application Service Center, National Immigration Administration of PRC
* Includes visa-free group tours from Turkmenistan

- **Continuous Increase in Visa-Free Countries**

From Q3 2025 to Q2 2026, China has signed mutual visa exemption agreements with 3 countries (Azerbaijan, Malaysia and the Federated States of Micronesia) and introduced unilateral visa-free entry to nationals of 3 countries (Sweden, the UK and Canada). China now has mutual visa exemption arrangements with 29 countries and offers unilateral visa-free entry to 50 countries, totaling 79 visa-free countries.

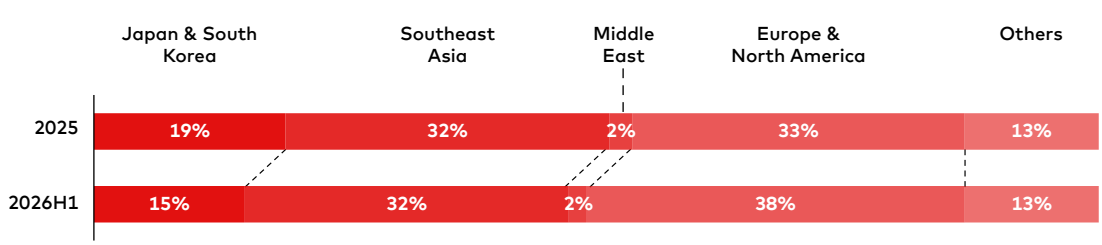
Southeast Asia Maintains Strong Momentum, While Europe and North America Accelerate Recovery to Drive Inbound Tourism Growth

Since 2025, China's inbound visitor mix has continued to evolve. The recovery of international flights, easier visa access and the growing popularity of "China Travel" on overseas social media have accelerated the rebound in Europe and North America, making them key growth drivers. Trip.com Group data shows double-digit growth in arrivals from these markets in H1 2026, with growth up more than 30 percentage points from 2025.

Meanwhile, Southeast Asia remains a major source of incremental growth. Supported by expanded visa-free access and geographic proximity, arrivals from Southeast Asia maintained double-digit growth in H1 2026. Visa-free markets such as Malaysia, Singapore and Thailand continued to bring incremental visitors, demonstrating the impact of greater travel convenience on inbound tourism.

Compared with the strong recovery in Southeast Asia, Europe and North America, Northeast Asia saw more moderate growth. Japan moved down in the source-market rankings, while South Korea remained relatively stable. Overall, Japan and South Korea have largely completed their post-pandemic recovery, with growth now shifting toward a more normalized pace.

Inbound Visitor Mix by Source Market: H1 2026 vs. 2025



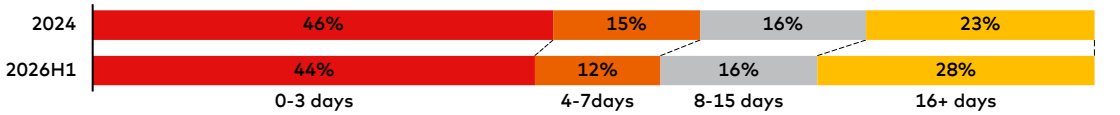
*Data Source: Trip.com Group

3.2 Inbound Traveler Product Bookings

Inbound Travel Expands Beyond Gateway Cities as Travelers Explore More Distinctive Destinations

With expanded visa-free access, the 240-hour visa-free transit policy and the continued recovery of international flights, inbound tourism in China is shifting toward more in-depth travel experiences. Travelers are also planning further ahead. Trip.com Group data shows that in H1 2026, 27.7% of bookings were made more than 16 days in advance, nearly 5 percentage points higher than in 2024, while over 43% were made at least one week ahead. This suggests that more international travelers are including China in their medium- to long-term travel plans and planning multi-city, multi-destination itineraries.

Advance Booking Window for Inbound Travel: H1 2026 vs. 2024



*Data Source: Trip.com Group, aggregated and anonymized data



As travelers explore China more deeply, their geographic reach is also expanding. According to Qunar, inbound flight bookings by international travelers covered 160 cities across China in H1 2026. While Shanghai, Beijing, Shenzhen, Guangzhou and Chengdu remain the main gateways, more travelers are adding distinctive destinations such as Chongqing, Xi'an, Zhangjiajie and Harbin to their itineraries, creating a "gateway city + distinctive destination" travel pattern. Following the launch of independent customs operations at the Hainan Free Trade Port, tourism growth has continued to benefit Haikou and Sanya, both of which entered the national Top 20. Overall, China's inbound tourism is shifting from concentration in a few gateway cities to a broader spread of destinations nationwide.

Top 20 Cities by Inbound Flight Bookings in H1 2026 and Ranking Changes vs. 2024

Top 1-5	Shanghai	Beijing	Guangzhou	Shenzhen	Chengdu
Top 5-10	Chongqing +2	Hangzhou -1	Xiamen -1	Kunming	Qingdao
Top 10-15	Xi'an +2	Zhuhai -1	Zhangjiajie NEW	Nanjing -2	Harbin +4
Top 15-20	Fuzhou -2	Sanya NEW	Wuhan -3	Haikou NEW	Suzhou -3

*Data Source: Trip.com Group, aggregated and anonymized data

Distinctive Local Stays and Social Media Hotspots Open a New Window into Chinese Culture

Accommodation choices provide an important window into changes in how inbound travelers experience China. As demand for deeper travel and local experiences grows in recent years, many international visitors have noted that distinctive accommodation is becoming an important way to understand Chinese culture and local lifestyles. More travelers are choosing accommodations with strong regional characteristics, such as historic villas in Shanghai and traditional stilt houses in Southwest China. Beyond providing a place to stay, these properties offer a more immersive way to experience Chinese culture.

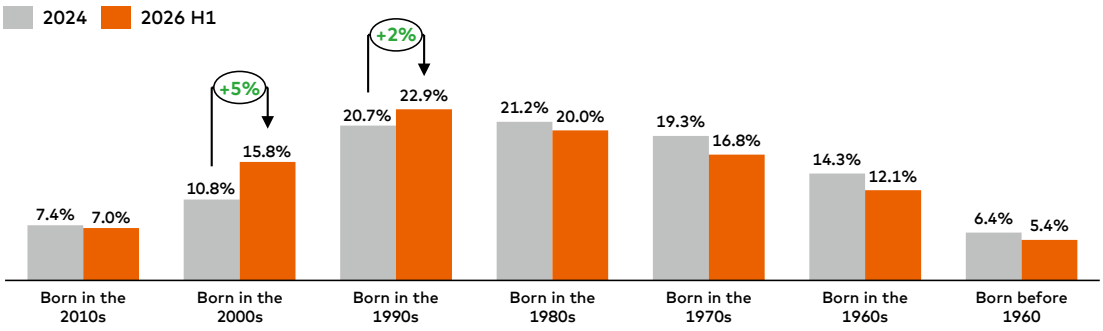


As younger travelers continue to account for a growing share of inbound visitors, overseas social media platforms such as TikTok, Instagram and YouTube are playing an increasingly important role in shaping travel decisions. Compared with traditional promotion of tourist attractions, aspects of modern everyday life in China, such as high-speed rail, mobile payments, drone delivery, bike-sharing and city nightscapes, are proving particularly appealing to younger international travelers.

Chongqing is one of the most prominent examples of this trend. With its distinctive mountainous terrain, multi-level transportation network and visually striking urban landscape, the city has been dubbed an "8D city" and a "real-life cyberpunk city" by overseas social media users. Since 2025, widely shared social media content around visits to China by prominent international online creators and NBA star Stephen Curry has further increased Chongqing's international exposure. According to Trip.com Group data, this wave of online attention contributed to a 170% YoY increase in inbound visitor arrivals to Chongqing in 2025, while hotel bookings in some commercial districts increased by as much as eightfold. International travelers interviewed also highlighted Chongqing's mountainous cityscape, monorail running through buildings and air-raid shelter bars as some of their most memorable experiences in China.

Chongqing's growing popularity reflects a broader shift in how China is presented to international travelers, from conventional attraction-led destination marketing toward showcasing urban lifestyles and everyday experiences. An increasing number of younger travelers are discovering China through social media and viewing the country as a destination for experiencing contemporary urban life.

Age Distribution of Inbound Travelers



*Data Source: Trip.com Group; data have been anonymized and aggregated.

3.3 Inbound Spending Structure and Payment Behavior

Major Inbound Source Markets: High Spending from Europe and the Americas, Strong Growth from Southeast Asia

Spending Growth and Average Per-Card Spending by Major Inbound Source Market

	Indonesia	Singapore	UK	Australia	Malaysia	Thailand	U.S.	South Korea
Spending Growth								
Avg Per-Card Spending								

*Data source: Mastercard Insights; data have been anonymized and aggregated, Q3 2025 to Q2 2026.

From Q3 2025 to Q2 2026, the major inbound source markets generally achieved rapid growth, with Indonesia, Singapore, the UK, Australia and Malaysia recording year-on-year growth of over 50%, and Thailand, the U.S. and South Korea over 25%. As one of the fastest-growing major source markets, Indonesia also maintained a high average per-card spending, with shopping and medical/wellness, the two categories with the highest average transaction values, contributing nearly 75% of its incremental spending. Beyond the major source markets, several emerging markets also stood out: Kazakhstan, Turkey, Canada, Mexico, Brazil and Saudi Arabia all recorded year-on-year growth of over 50%.

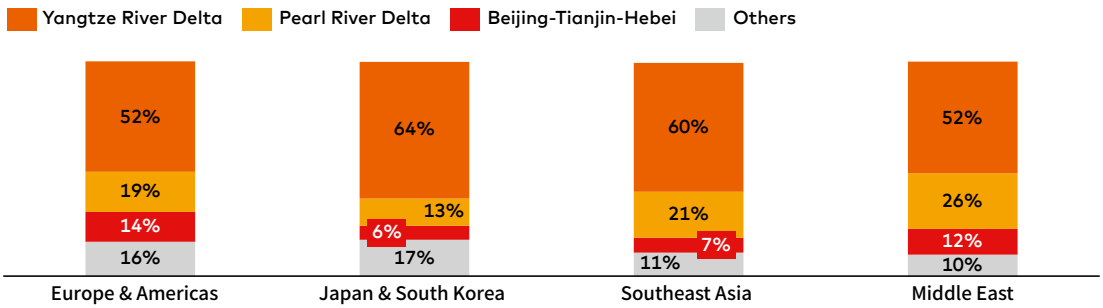


Shanghai Remains the Top Inbound Spending Destination, While City Preferences Vary by Source Market

Inbound visitor spending remains highly concentrated in first-tier and leading new first-tier cities. From Q3 2025 to Q2 2026, the top 10 cities by total inbound visitor spending were Shanghai, Beijing, Guangzhou, Shenzhen, Chengdu, Hangzhou, Suzhou, Xiamen, Chongqing and Nanjing. Shanghai ranked first in both spending value and year-on-year growth, and was the leading spending destination across source markets, ranking first in both spending value and visitor volume.

Beyond Shanghai, visitors from Southeast Asia and the Middle East showed a stronger preference for Guangzhou. Visitors from Japan and South Korea exhibited more diversified destination preferences: in addition to first-tier cities, distinctive tourism destinations such as Zhangjiajie, Xi'an, Qingdao and Yanji were also among their popular choices.

Distribution of Inbound Visitors by Destination City and Source Market



*Data source: Mastercard Insights; data have been anonymized and aggregated, Q3 2025 to Q2 2026.

Natural and Cultural Attractions Drive the Rise of Emerging Destinations

Inbound tourism is expanding beyond traditional gateway cities to a broader range of distinctive destinations, with several cities rich in natural and cultural attractions recording rapid spending growth. Jiaxing, Guilin and Harbin have risen notably in the rankings, emerging as representative destinations in this trend. Led by its "Discover China's Ancient Water Towns in Jiaxing" tourism proposition, Jiaxing has built a distinctive appeal around ancient towns such as Wuzhen and Xitang and the cultural experience of Jiangnan water towns. Its proximity and strong transport links to Shanghai and Hangzhou have further supported its appeal, helping Jiaxing enter the top 30 cities by transaction value for the first time. Guilin continues to attract visitors from major source markets including South Korea, Vietnam and Malaysia, drawing on its renowned natural attractions such as the Li River, Yangshuo and its karst landscapes. Harbin, meanwhile, offers a highly seasonal tourism experience built around its winter scenery, seasonal cultural and tourism activities, and urban history and culture. Together, distinctive

natural and cultural attractions and immersive local experiences are encouraging inbound travelers to explore a wider range of destinations across China.

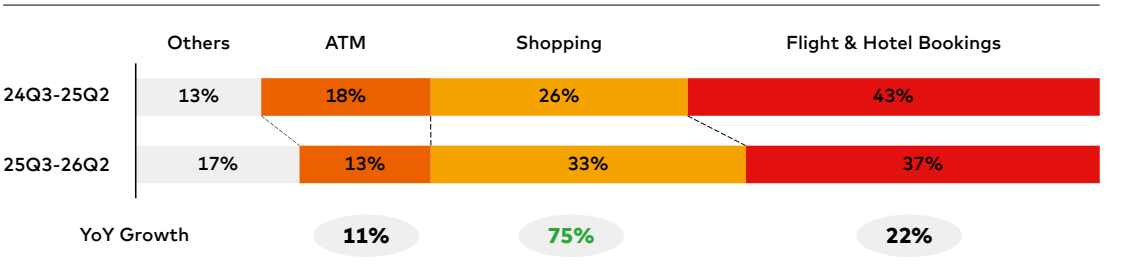
Spending Becomes More Diverse, with Shopping Emerging as a High-Share, High-Growth Category

In terms of spending structure, inbound visitor spending remains concentrated in three major categories: flight and hotel bookings, shopping, and ATM cash withdrawals. Together, flight and hotel bookings and shopping account for 70% of total inbound spending, remaining the core components of inbound visitor expenditure.

Among these categories, shopping recorded the fastest growth, rising 75% year on year, significantly above the overall growth rate of 42%. The strong increase in shopping spending has benefited from growing visitor flows driven by visa-free policies, while improvements in payment convenience and departure tax refund services, together with the increasing international appeal of Chinese brands, are encouraging more visitors to add "Made in China" products and Chinese brands to their travel shopping lists.

Notably, ATM cash withdrawals account for around 14% of inbound spending but grew only 11% year on year, well below the overall spending growth rate. This reflects continued improvements in foreign card acceptance and mobile payment accessibility in China. In recent years, measures such as linking foreign cards to domestic mobile wallets, enabling direct acceptance of overseas wallets and bank cards, and introducing contactless card payments on public transit have made it easier for international visitors to pay by card or digital wallet, reducing their reliance on cash and further improving the accessibility of China's payment environment for international travelers.

Major Inbound Spending Categories and YoY Growth



*Data source: Mastercard Insights; data have been anonymized and aggregated.

Spending Extends Beyond Core Travel Needs as Local Lifestyle Consumption Gains Share

Inbound visitor spending remains concentrated in major cities such as Beijing, Shanghai, Guangzhou, Shenzhen, Hangzhou and Chengdu, but spending patterns are becoming increasingly diverse. Compared with previous years, when hotel spending was overwhelmingly

dominant, shopping, dining, and leisure and entertainment have gained share across several cities.

In Chengdu, shopping accounts for around 50% of inbound visitor spending, highlighting the city's appeal for retail and tourism-related consumption. Shanghai has a more balanced spending mix, with shopping, dining, and leisure and entertainment together accounting for more than 50% of inbound spending. This indicates that international visitors are increasingly expanding beyond traditional business and sightseeing activities into a wider range of experiences, including culinary exploration, nighttime consumption and urban exploration. Overall, inbound visitor spending is gradually expanding from essential categories such as accommodation and transportation toward local lifestyle consumption, including shopping, dining, cultural experiences, and leisure and entertainment. This shift not only reflects longer stays and a broader range of visitor activities, but also suggests that international travelers are engaging more deeply with Chinese cities and everyday life.

Share of Offline Card Spending by City and Category

	Beijing	Shanghai	Guangzhou	Shenzhen	Hangzhou	Chengdu
Hotels	~ 50%	~ 40%	~ 40%	~ 30%	~ 50%	~ 40%
Shopping	~ 30%	~ 40% ▲	~ 20%	~ 30% ▲	~ 30% ▲	~ 50% ▲
Dining	~ 10%	~ 10% ▲	~ 5%	~ 10% ▲	~ 5%	~ 5% ▲
Leisure & Entertainment	~ 1%	~ 2% ▲	~ 1%	~ 2%	~ 1%	~ 1%

*Data source: Mastercard Insights; data have been anonymized and aggregated. Arrows indicate an increase in share versus the previous year.



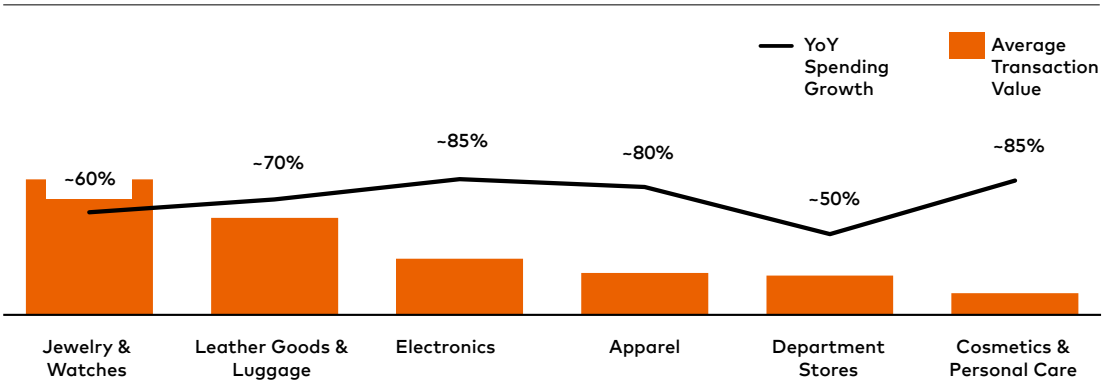
Departure Tax Refunds Drive Rapid Growth in Inbound Shopping, Benefiting Both International Luxury and Chinese Brands

Since April 2025, China's "instant tax refund upon purchase" departure tax refund service for international visitors has expanded nationwide from an initial pilot program. The policy brings the refund process forward: after signing the required agreement and completing a credit card pre-authorization at the point of purchase, travelers can immediately receive an RMB advance equivalent to the tax refund amount, rather than waiting until departure. This has significantly improved the convenience of shopping for inbound travelers. Since then, authorities have introduced further measures to improve departure tax refunds, including lowering the minimum purchase threshold from RMB 500 to RMB 200, raising the cash refund limit from RMB 10,000 to RMB 20,000, and promoting paperless refund processes, further supporting China's development as a tax-refund-friendly shopping destination.

Together, these measures are transforming departure tax refunds from a post-purchase service into an important driver of visitor spending. Offline shopping spend on overseas bank cards has grown by more than 70% for two consecutive years, while shopping spend in Q2 2026 increased 40% from Q1, indicating sustained and accelerating momentum in inbound shopping.

Compared with H1 2025, all major inbound shopping categories recorded growth in H1 2026. Leather goods & luggage and jewelry & watches recorded the highest average transaction values, with both also posting modest year-on-year increases. Hermès, Chanel and Louis Vuitton accounted for relatively large shares among luxury brands, highlighting China's continued appeal as a luxury shopping destination. In terms of shopping destinations, SKP and MixC were the most popular shopping mall brands among inbound visitors. Outlets and second-hand luxury platforms, including Shanghai Village and ZEER, also recorded notable growth.

Top Shopping Categories by Spending Growth and Average Transaction Value, H1 2026



*Data Source: Mastercard Insights; data have been anonymized and aggregated.
YoY spending growth is calculated against H1 2025

Beyond international luxury brands, Chinese brands are also gaining momentum. Songmont and Laopu Gold recorded particularly strong growth, with spending in H1 2026 increasing severalfold compared with H1 2025, while brands such as ANTA and Chow Tai Fook also grew rapidly, reflecting increasing international recognition of Chinese design. Interviews with international visitors conducted by Mastercard found that more travelers are making dedicated visits to POP MART, showing interest in domestic brands such as ICICLE, and adding products with distinctive Chinese characteristics and local souvenirs to their shopping lists.

From "Payment Convenience" to "Payment Choice"

With measures such as linking overseas cards to domestic wallets, enabling international wallets for payments in China, and expanding POS acceptance of foreign cards, payment barriers for international visitors have been significantly reduced. Interviews indicate that most respondents can now successfully make offline payments at hotels, restaurants and shopping malls, with payment acceptance improving noticeably compared with the past.

As inbound visitor numbers continue to grow and travel scenarios become more diverse, the focus needs to evolve from simply making payments more convenient to providing greater choice in how visitors pay. On the one hand, current pain points are increasingly concentrated in platform-based services. Issues frequently raised in interviews include food-delivery platforms requiring a Chinese mobile number, bike-sharing services requiring identity verification with a Chinese ID, and ride-hailing apps that may not support direct linking of overseas cards and instead require payment through digital wallets. In these situations, payment itself is not necessarily the main barrier. Rather, gaps across the broader payment and identity-verification journey can make these services difficult for international visitors to use. On the other hand, while linking overseas cards to domestic mobile wallets can support QR-code payments, foreign cards and cash remain important payment options for visitors who have not linked their cards before arriving in China or encounter difficulties during the linking process. Foreign card acceptance outside major commercial districts in Beijing, Shanghai, Guangzhou and Shenzhen still has room to improve. Other challenges include some merchants not having sufficient change for cash payments and limited access to foreign-currency exchange services outside major urban areas.

The next step for inbound payments is therefore no longer simply enabling visitors to "make a payment," but giving them a broader range of payment options. This will require addressing both payment and identity-verification friction across platform-based services, while continuing to expand foreign-card acceptance. Card payments, contactless payments, QR-code payments and cash should coexist, allowing international visitors to pay using the methods that are most familiar and convenient to them.

Chapter 4

New Forms of Tourism in the AI Era



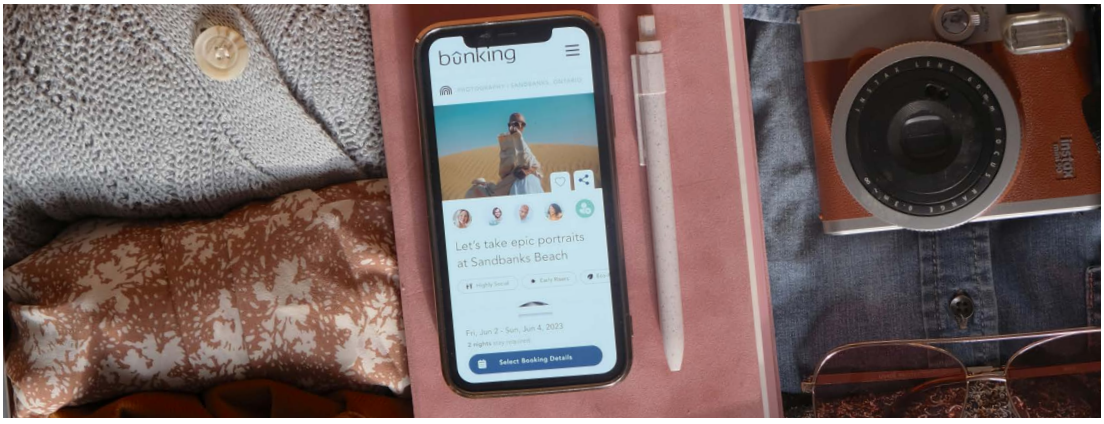
4.1 AI-Driven Traveler Decisions and Experiences

As the tourism market continues to evolve and AI technologies mature rapidly, AI is becoming increasingly embedded across the entire travel journey. On the demand side, AI is beginning to play a role across pre-trip inspiration, booking decisions and in-trip services. On the supply side, AI is driving tourism products, service models and supply systems toward greater intelligence and precision.

AI Reshapes the Demand Side: From an Information Search Tool to an Intelligent Gateway for Inspiration, Planning and Decision-Making

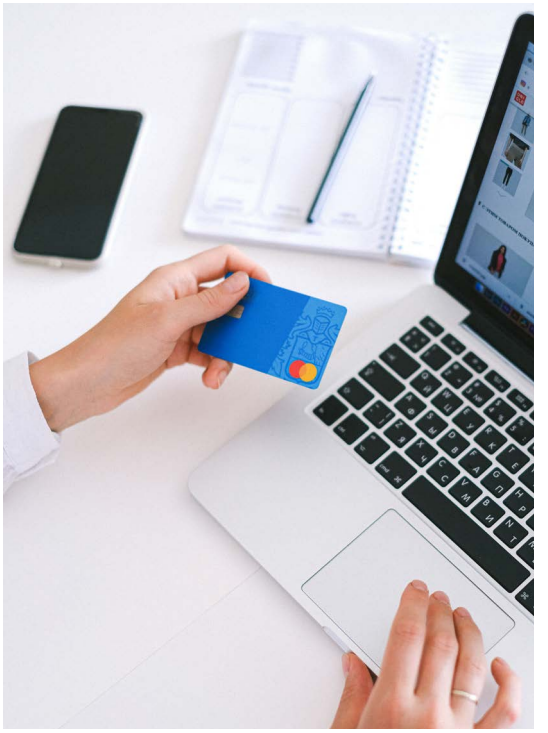
Overall, as AI increasingly connects travel inspiration, itinerary generation, product booking and in-trip services, travelers are shifting from multi-platform price comparisons and fragmented searches toward conversational, one-stop planning, further streamlining the travel decision journey.

In terms of adoption, generative AI has evolved from an experimental tool used by a small group of early adopters into a common entry point for pre-trip planning. Research in Chinese mainland shows that awareness of AI-powered travel tools exceeds 90%, while adoption is approaching 80%, with 22.5% of respondents already using them frequently[1]. Overseas markets show a similar trend, with 85% of respondents saying that AI can save time and provide recommendations better tailored to their needs[2]. The supply side is also moving in parallel, with more than 70% of tourism businesses having introduced AI into content generation, intelligent customer service and traveler-facing itinerary assistants, laying the foundation for continued AI adoption across the pre-trip journey[1].



At the user level, travel inspiration is the earliest and most widely adopted area of AI application. Travelers can use AI to find destination inspiration and discover places they may not have previously considered. Compared with conventional recommendation lists, AI is better able to respond to less standardized requests such as "less crowded," "reliable choices," and "suitable for traveling with elderly family members," translating broad preferences into specific destination and activity recommendations and giving niche routes and non-standardized experiences greater visibility.

When it comes to coordinating traveler needs and planning itineraries, AI takes on some of the most time-consuming tasks traditionally involved in travel planning. Budget, physical ability, interests and time constraints among travel companions often conflict, while searching, integrating and filtering information across flights, hotels and attractions can also be complex. Travelers can now provide these requirements to AI at once, allowing it to balance different priorities within a single itinerary while providing route planning, time estimates and budget breakdowns. This transforms what was previously a fragmented and repetitive process of manual searching, filtering and coordination into the generation of a structured plan in one step. For example, Trip.com Group's TripPlanner integrates information on flights, hotels, attractions and restaurants into a single platform and can quickly generate personalized itineraries based on traveler needs, demonstrating the increasing integration of travel planning tools[3].



As AI takes on more planning tasks, travel decision-making has become significantly more efficient. One leading platform's AI travel assistant generated more than 1.315 million itineraries within three months of launch, saving users an estimated 4.71 million hours of information-search time[4]. More fundamentally, AI is reshaping the decision journey by integrating previously fragmented travel-planning processes into a connected series of decision-making experiences, shifting travelers from actively searching for information toward managing their needs and selecting among proposed options, thereby improving overall decision-making efficiency.

AI-Powered Booking: From Pre-Trip Inspiration and Planning to One-Stop Booking

As AI becomes increasingly embedded in OTA platforms and travel products, its role



in travel is expanding from pre-trip planning to booking. The traditional "search – filter – compare – purchase" journey is gradually evolving into "converse – recommend – confirm – book," with AI becoming an important bridge between traveler needs and transaction conversion. According to relevant research[5], users referred to travel websites through AI recommendations have a 45% lower bounce rate than those from traditional channels. This suggests that travelers are not only willing to ask AI for advice, but are increasingly willing to trust its recommendations and use them to continue browsing, comparing and ultimately booking.

For example, an AI trip-planning tool launched by an international OTA platform[6] allows users to specify their budget, travel dates and preferences in natural language. AI can then filter, compare and combine options across flights, hotels and local activities, generating an itinerary that can be booked directly. With intelligent search, itinerary planning and conversational booking, the previously fragmented process of gathering information and making decisions across multiple pages is greatly simplified, shortening the journey from expressing travel needs to completing a booking.

However, AI adoption in travel booking remains at an early stage, with significant differences across product categories. For less standardized products such as hotels, vacation packages and local activities, travelers often need to consider multiple factors including location, facilities, price, reviews, personal preferences and the needs of their travel companions. As these decisions are more complex, travelers are more receptive to AI-assisted filtering and recommendations. Some platforms are already connecting conversational AI with inventory, loyalty benefits and payment, enabling users to move from inquiry to booking within a continuous conversation.

By contrast, transportation products such as flights are more standardized, with consumers continuing to focus primarily on price, schedules and airlines. AI currently plays a supporting role in areas such as price monitoring, route planning and option comparison, while final confirmation, payment and ticketing are still mainly completed through airline or OTA platforms.

Meanwhile, AI applications in booking are expanding to include budget management, real-time customer service, travel disruption management, automated rebooking and cross-language communication. For example,

when a flight is delayed or canceled, AI can help assess alternative flights, hotel availability and the impact on subsequent travel plans, and provide travelers with adjustment recommendations.

From an industry perspective, deeper integration of AI agents with real-time inventory, pricing systems, loyalty programs and booking interfaces could move travel from an era of information search toward one of agent-led execution. Travelers may eventually need only to express their travel intent, with AI handling itinerary generation, product selection, price comparison, booking and payment, and in-trip management, further shortening the travel journey and creating a more seamless and personalized booking experience.

AI-Powered In-Trip Experiences: From Breaking Down Cross-Border Barriers to Becoming an End-to-End Digital Travel Companion

For cross-border travelers, arriving at the destination is often where the real challenges begin. Language barriers, route choices, access to local information and unexpected changes can continually affect the travel experience and willingness to spend. The value of AI during the trip is evolving along a path of lowering barriers, improving efficiency, enriching experiences and consumption, and ultimately enabling end-to-end intelligent services, helping travelers move from reacting to unfamiliar environments to exploring more confidently and personally.

AI is first helping to break down language and information barriers overseas. Everyday activities such as asking for directions, ordering food, navigating public transport and visiting attractions can become more difficult when communication is limited. With advances in voice recognition, image recognition and real-time translation, travelers can communicate with local residents, quickly understand menus, signs and attraction information through images, and use AI assistants to understand local rules. In more complex situations such as tax refunds and emergency medical care, AI can also help travelers understand key information and communicate their needs more accurately, reducing communication barriers, increasing travel confidence and further supporting tourism spending.

Similarly, AI can support more efficient travel decisions. AI-powered navigation can integrate traffic, crowd levels, weather and facility information to recommend the best option at a given moment. Whether avoiding congestion at attractions, adjusting plans due to unexpected weather, or locating parking, charging stations and accessible facilities on a road trip, AI can provide more context-aware recommendations. Navigation is therefore evolving from a route-planning tool into a real-time decision assistant, reducing waiting, detours and repeated searches, while freeing up more time for sightseeing and spending.

AI is also becoming an important tool for enriching travel experiences and driving consumption. Travelers can photograph museum exhibits to receive background information and ask follow-up questions about history, art and other areas of interest. Wearable devices such as AI glasses extend these interactions to more



attractions. Companies such as Lingban Technology are exploring AI + AR glasses that can provide real-time explanations based on what travelers see, transforming traditional guided tours into interactive intelligent experiences. As AI gains a better understanding of travelers' location, budget and interests, it can proactively recommend hidden attractions, local restaurants and activities, seamlessly connecting personalized exploration with local spending. AI imaging tools can further extend the travel experience by helping travelers edit photos and generate travel videos for social media, amplifying destination exposure, inspiration and related spending.

Currently, these capabilities remain fragmented across different tools and face limitations including inaccurate or contextually weak multilingual translation, occasional AI hallucinations, and incomplete local destination knowledge. As AI Agent technology matures, these constraints may gradually be addressed, with translation, navigation, guided tours and content creation converging into a unified AI Travel Agent. AI could therefore evolve from a collection of standalone tools into a digital travel companion connecting traveler needs with tourism services.

***Data Source:**

1. 2026 H1 AI Travel Application Trends Insights Report;
2. Tailored Horizons: The New Rules of Travel Personalization in the Age of AI;
3. Trip.com Group, Trip.com Group AI Applications;
4. 2026 AI + Tourism Trends Report;
5. Travel Planning Gets an AI Upgrade;
6. Expedia Unveils New AI Trip Planning and Travel Ecosystem; Mastercard Insights and Services desk research.

4.2 AI Reshaping the Tourism Supply Side

AI Empowers the Tourism Supply Side, Evolving from Smart Tools to an Agent-Driven Ecosystem of Supply, Operations and Services

From the supply-side perspective, AI is creating a new tourism ecosystem built around smart tools, dynamic supply, precision operations and cross-border services, improving supply efficiency, optimizing operating costs and enhancing user experience. In the process, AI is gradually reshaping traffic entry points, service models and value creation across the tourism industry.

At the supply organization level, AI is accelerating the transformation of OTAs into intelligent travel service platforms. Trip.com Group's TripGenie is increasingly embedded in travel planning and product recommendations. As agent technology advances, AI can not only understand traveler needs and provide personalized recommendations, but also coordinate tourism resources and assist with transactions, shifting tourism services toward AI-assisted decision-making and supply organization. AI-powered customer service is also widely used for inquiries, information requests and after-sales support, improving service efficiency and reducing operating costs, although there is still room for improvement in handling complex scenarios, understanding deeper needs and delivering more emotional services.

At the product supply level, hotels and attractions are using AI to optimize product selection, dynamic pricing, inventory management and resource allocation, enabling more precise supply and higher returns. Travel agencies use AI to generate personalized itineraries and optimize resource allocation. Attractions and cultural venues are also integrating AI-powered guides (such as "Li Xiaobo" at the Shanghai History Museum and "AI Guide Wang Bo" at Tengwang Pavilion in Nanchang, Jiangxi), intelligent Q&A, AR-guided tours and wearable devices (such as applications at Chen Clan Ancestral Hall in Guangzhou, Tianyi Pavilion in Ningbo, and the "AI + AR Smart Tour of Tanzhe Temple" project in Beijing) to create smart guided tours and immersive experiences. Meanwhile, AI is also being applied to the digital preservation and revitalization of cultural heritage, exemplified by the digital restoration of murals by the Dunhuang Academy, further upgrading tourism and cultural offerings.





At the operations and marketing level, AI is shifting tourism operations from experience-driven to data-driven models, while marketing is moving from mass communication toward highly personalized engagement. Platforms and merchants can generate tailored content based on user interests, spending power and travel intent, and improve customer acquisition and marketing ROI through intelligent recommendations and targeted advertising. Tourism brands are also exploring integration with large-model ecosystems, enabling product recommendations and bookings directly within user conversations while using booking data to inform marketing strategies, further connecting content, marketing and transactions.

At the cross-border ecosystem level, AI is accelerating the transformation of cross-border tourism supply. Through multilingual interaction, intelligent customer service, localized recommendations and data-driven operations, platforms can lower information and transaction barriers for international travelers and improve inbound travel experiences. For example, tourism development projects supported by Fliggy have applied AI to inbound traveler services, tourism recommendations and tourism data operations, exploring greater coordination between public tourism resources and market-based travel services. Looking ahead, as agent capabilities and cross-departmental data collaboration improve, AI will further advance intelligent inbound services, destination operations and the broader tourism consumption ecosystem.

***Data Source: Trip.com Group.**

4.3 Risks and Challenges of Cross-Border AI

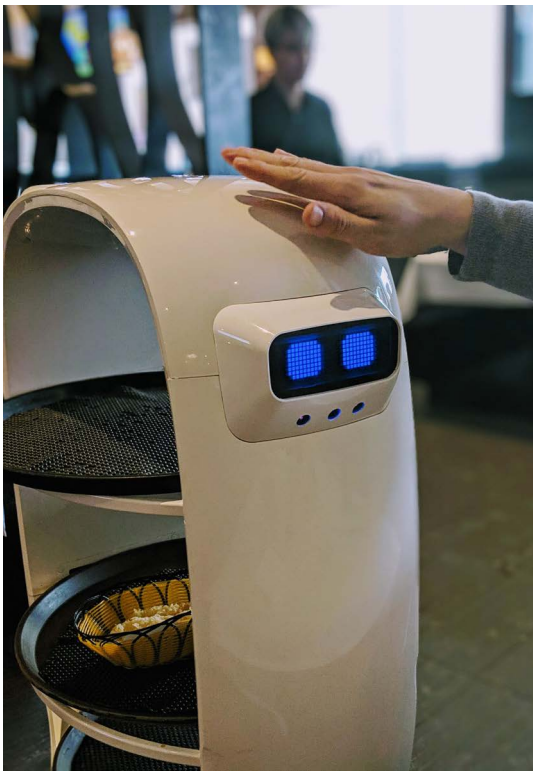
From "Good at Recommending" to "Trustworthy": Four Real Pain Points in Cross-Border Travel

As AI increasingly evolves into a decision-making assistant, the industry's focus is shifting from technological capabilities to user trust. From the traveler's perspective, today's AI-powered cross-border travel products face four key challenges.

First, information may appear comprehensive but may not always be up to date. Travelers are more concerned about receiving the wrong answer than receiving no answer at all. AI can quickly compile travel guides, visa requirements and transportation options, but outdated policies or invalid information can lead to serious consequences. More trustworthy travel AI should not only provide answers but also explain where the information comes from. Systems should clearly display sources, update times and uncertainty notices, while providing links to official channels for verification.

Second, translation can bridge language gaps but may not fully understand context. AI translation tools can already provide fluent language conversion, but cross-border travel involves more than language alone. In areas such as healthcare, insurance and customs,





travelers need accurate translation as well as an understanding of cultural differences, technical terminology and risk levels. Future travel translation tools should evolve from language translators to context-aware translation assistants, providing keyword prompts, original-text references and access to human support in higher-risk situations.

Third, booking is becoming simpler, but gaps remain across cross-border services. As AI becomes integrated into travel platforms, travelers can increasingly use natural-language conversations to plan itineraries, select products and even complete parts of the booking process. However, many post-booking services remain fragmented. Visa changes, medical assistance and insurance claims, for example, may still require coordination across multiple platforms and service providers. The next stage of travel AI may therefore extend beyond optimizing bookings to connecting the entire service journey and creating a more seamless cross-border travel experience.

Fourth, greater personalization also requires greater transparency. To provide precise recommendations, AI needs access to information such as travelers' locations, preferences and itineraries. More data can enable greater personalization but also increases concerns around privacy and data security. Future product design should integrate privacy into the user experience, clearly explaining how data will be used at key authorization points and offering options for minimum data permissions, disabling personalized recommendations, and deleting or exporting personal data.

The future of AI in cross-border travel will be defined not only by model capabilities, but also by who can provide trustworthy information, understand real-world contexts, connect fragmented service journeys and handle user data transparently. Only then can AI truly move from being "good at recommending" to "trustworthy."

Chapter 5

Case Studies of Popular Destinations



5.1 Popular Outbound Tourism Destinations

This chapter presents case studies of representative cultural tourism destinations. Overseas samples include the United States, Canada and Mexico, France and Brazil, while Beijing, Hangzhou and Hainan were selected in the Chinese mainland. The analysis examines market opportunities across dimensions such as the sports-event economy, urban cultural tourism and leisure vacations.

Event-Driven: FIFA World Cup 2026

- **Sold out: the World Cup heated up flights and hotels across half the globe**

The FIFA World Cup 2026 hosted by Canada, Mexico and the United States has noticeably boosted travel from the Chinese mainland to North America to watch matches. Data from multiple travel platforms show that demand for flights and accommodation to the US, Canada and Mexico among Chinese mainland travelers rose significantly during the tournament. Flight bookings to several major host cities, including New York, Atlanta, Miami and Monterrey, posted double-digit growth, with Miami and Monterrey more than doubling. Accommodation demand also heated up, with hotel prices around the final's host venue rising sharply.[1,2]



- **Immersive match-viewing trips go mainstream, with strong demand for premium packages**

As North American host cities are widely dispersed, Chinese fans tend to combine match viewing with travel. Market data show that most travelers plan to stay more than a week and attend multiple matches across cities. Some premium packages covering the quarter-finals, semi-finals and final are priced at over RMB 200,000, showing that the World Cup has extended from pure spectating into high-end experience-driven travel consumption.[3,4]

Cultural Diplomacy: China-France 60th Anniversary

France remains the most iconic European destination for Chinese travelers. This is driven not only by the policy and momentum of the 60th anniversary of China-France diplomatic relations in 2024, the China-France Year of Culture and Tourism and the Olympic Games Paris 2024, but also by France's strong alignment with the structural changes Chinese travelers are undergoing. China's unilateral visa-free policy for French citizens has greatly stimulated travel by French tourists to China and accelerated the expansion and recovery of China-France air routes, providing ample flight capacity for Chinese travelers traveling to France. Following the policy rollout, trips by Chinese residents to France reached 130,000, representing a remarkable 215.28% increase.[5]



According to the latest data from Atout France, as of 2026, the China-France tourism market shows the following three core impacts and changes:

- **Shift in travel patterns: independent and small-group travel end the coach tour era**

In recent years, travel has been driven mainly by entertainment, sports and cultural experiences, and for Chinese travelers, France is the ideal place to experience culture. The hurried sightseeing of "30-to-50-person coach tours" has declined sharply, while independent travel and small groups have become mainstream, reflecting a pursuit of autonomy, privacy and highly tailored travel:

- Independent travel overtakes group tours: As early as 2024, independent-travel visas issued by France in China exceeded group-tour visas for the first time, accounting for over 50%.

- **Small groups dominate:** In 2026, over 70% of Chinese travelers to France chose customized small groups of 6-15 people, trips with family and friends, or solo trips.

- **Venturing deeper:** Travelers are no longer limited to Paris. Southern France (Provence, the Côte d'Azur), eastern France (Alsace) and the Centre-Val de Loire have become core hubs for customized small groups, which focus on in-depth travel built around wine, gastronomy, art, lifestyle and immersive local culture.

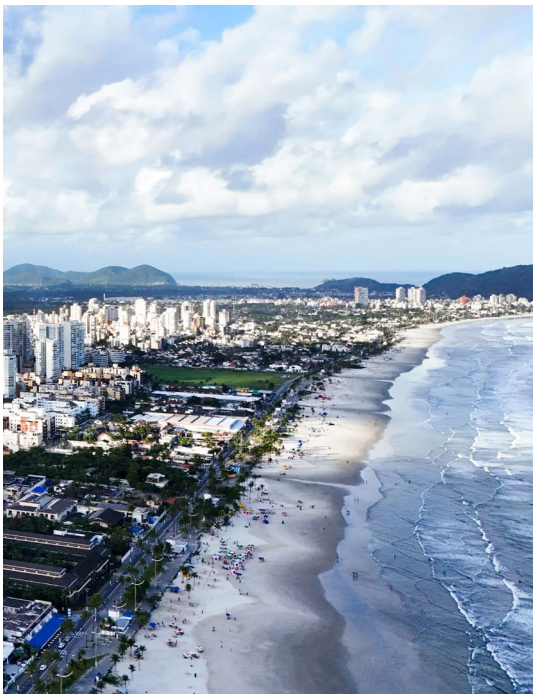
- **Travel demand upgrade: from "luxury shoppers" to "French lifestyle curators"**

From "shopping sprees" to "immersive local experiences": Chinese travelers' consumption and travel mindsets are adopting a quality-first pattern:

Luxury shopping sprees are fading as experience-driven spending becomes mainstream: The long queues once seen outside duty-free stores have largely disappeared, and spending is shifting from luxury hauls to "experience-driven spending + boutique shopping + personalized consumption".

Relaxed, label-free travel: Travelers increasingly prefer to spend on guesthouses and distinctive independent hotels, or to slow down in cafés, museums and small towns in the South of France. Wine tourism, traditional craftsmanship (e.g., Alsace crystal-making) and cycling have become new hallmarks of Chinese travelers' immersive experience of authentic French living.

A green and vibrant Olympic effect: During the Olympic Games Paris 2024, growth in Chinese visitors to Paris ranked among the highest worldwide. The Games sparked a tourism boom across France, with the "sports spectating + outdoor exploration" trend



creating lasting momentum and driving greater adoption of low-carbon transport and digital ticketing among younger travelers.

- **Market recovery and rebound in flight routes: despite shifts in economy and travel environment, demand for travel to France remains resilient**

To serve this wave of high-net-worth, personalized travelers, Chinese and French tourism supply chains and digital services have been closely aligned:

"Visa+service" seamless integration: Launched by Atout France in strategic partnership with visa centers in 15 cities across Chinese mainland, the "Digital Passport" program (WeChat mini program: "法国旅游发展署") has surpassed 660,000 users. By reaching travelers at the moment their visas are approved, it offers a complete closed loop covering pre-trip themed guides, in-trip interactive maps, and exclusive

benefits from partner merchants (e.g., Printemps and La Vallée Village).

Explosive market momentum: Boosted by sustained exposure of direct routes such as Marseille-Shanghai, in Q1 2026, air ticket bookings from the Chinese market grew 17% YoY, showing strong recovery momentum.

Deepening high-net-worth customization: Travel products have fully shifted toward "longer stays" and "high-end customization", not only extending Chinese travelers' average stays but also providing essential support for France's national strategic goal of reaching EUR 100 billion in tourism revenue by 2030.

Visa-free emerging destination: Brazil

- **Visa-free benefit: making the "out of reach" within reach**

In 2026, Brazil has become one of the fastest-growing long-haul destinations in China's outbound travel market. In 2025, Chinese visits to Brazil totaled 103,000[6], up 35% YoY; in H1 2026, arrivals hit 73,000[6], a record high for the same period. With the short-term visa-free policy taking effect in May 2026, Brazil has moved further into Chinese travelers' view. Yet what truly attracts them is not just convenience, but its world-class natural landscapes, diverse cultural appeal and in-depth exploration experiences distinct from traditional short-haul trips.



- **Globally unique landscapes have become Brazil's greatest draw**

Unlike short-haul island getaways in Southeast Asia or city trips to Japan and Korea, Brazil's core appeal for Chinese travelers is not convenience but uniqueness. Given the 20+ hour flight, Chinese travelers to Brazil tend to seek out "once-in-a-lifetime" world-class landscapes. This preference for "globally unique landscapes" has become particularly evident in China's outbound travel market in recent years. Compared with the shopping, food and city sightseeing of short-haul trips, uniqueness and irreplaceability are becoming more important travel decision factors than convenience for long-haul travel.

Iguazu Falls is the most representative example. As one of the world's largest waterfalls, in 2025 it received ~21,500[6] Chinese visitors, over one-fifth of all Chinese visits to Brazil. The Amazon rainforest embodies the imagination of "Earth's last pristine wilderness", with rainforest expeditions and wildlife watching offering exceptional scarcity. Lençóis Maranhenses National Park has rapidly gained popularity among Chinese tourists for the "otherworldly landscape" formed by white sand dunes and turquoise lagoons. The Pantanal wetlands, rich in wildlife, attract a growing number of eco-photography and high-end nature travel enthusiasts. For many Chinese travelers, Brazil's greatest appeal lies in natural wonders that no other destination can replicate.



- **More diverse traveler mix: younger and high-end segments are on the rise**

In the past, Chinese travelers to Brazil were mostly business travelers, tour groups or high-net-worth individuals. Thanks to easier visa access, the profile of travelers to Brazil is now diversifying rapidly.

On the one hand, the "Bleisure" trend is increasingly evident. After finishing work in São Paulo, many Chinese business travelers extend their trips to Rio de Janeiro, Iguazu Falls or the Amazon. On the other hand, young independent travelers are growing rapidly. Rather than traditional sightseeing, they care more about rare experiences and social-sharing value, and unique experiences such as Amazon expeditions, sand-dune lagoons and jaguar watching fit this demand perfectly.

Meanwhile, interest in Brazil among high-end travelers and silver generation is also rising. From boutique Amazon cruises to Pantanal eco-lodges, more and more travelers are willing to pay for exclusive nature experiences.

- **Social media is breaking through awareness barriers, making Brazil a new "bucket-list destination"**

If visa-free entry has lowered the barrier to travel, social media and digital platforms have accelerated Brazil's breakthrough in the Chinese market.

In the past, Chinese travelers' impressions of Brazil were largely limited to football and samba. Over the past two years, however, visually striking and irreplicable natural landscapes such as Iguazu Falls and the Amazon rainforest have drawn sustained attention on social platforms, transforming



Brazil from a traditionally "distant South American country" into a destination with a stronger sense of exploration. After the implementation details of the visa-free policy were announced, searches for the keyword "Brazil" on Trip.com Group's platform rose 25.3-fold compared with the previous period, and views for "Brazil flights" increased 45-fold, as online interest surged.

Meanwhile, Brazil's official tourism bodies are also actively entering China's digital ecosystem. On the one hand, the Ministry of Tourism of Brazil continues to deepen its cooperation with Trip.com Group, raising Brazil's visibility in Chinese travelers' pre-trip search and decision-making through destination showcases, content marketing and travel product promotion, with a focus on nature, ecology and cultural experiences. On the other hand, destinations have also begun operating Chinese social media accounts directly. For example, the Visit Iguassu (official tourism agency of Iguazu Falls) has built a dedicated Chinese-language website and runs accounts on Weibo, WeChat and Xiaohongshu (RedNote). As of April 2026, its Chinese website received more than 85,000 visits per month, and its official Weibo account had about 65,000 followers[7].

This kind of communication also matches shifting preferences among Chinese travelers: rather than simply pursuing convenience and value for money, more long-haul travelers are willing to pay for rare experiences "worth crossing half the globe for". Digital platforms further amplify the visual appeal of Brazil's "one-of-a-kind landscapes", gradually turning Brazil from a niche destination into a "bucket-list" trip worth a dedicated journey.

***Data Source:**

1. Trip.com 2026 FIFA World Cup Travel Trends;
2. 2026 FIFA World Cup Accommodation Booking Trends Report;
3. Trip.com Luxury Tailor-Made Travel and FIFA World Cup Spectator Packages Information;
4. FIFA World Cup 2026 Ticketing Information;
5. People's Daily Online
6. Ministry of Tourism of Brazil
7. Desk research

5.2 Popular Inbound Tourism Destinations

Cultural Heritage Landmark: Beijing

- **Beijing: an ancient capital's modern appeal**

In recent years, the number of foreign visitors on Beijing's streets has risen noticeably. In 2025, Beijing received 5.48 million inbound visits (+39% YoY), with tourism spending of US$7.08 billion (+44.3% YoY). Both figures fully surpassed 2019 levels and set new records. From January to July in 2026, this strong momentum continued, with 3.86 million inbound visits (+32.4% YoY), and tourism spending of US$5.28 billion (+39.7% YoY).[1] Behind this growth lies not only a rebound in international travel demand, but also Beijing's shift from a traditional sightseeing destination to an immersive-experience destination.

- **Classic landmarks being reinterpreted**

The Forbidden City and the Great Wall remain top choices for international visitors, but what draws them is no longer merely the check-in value of "been there, done that", but richer and more diverse cultural experiences. Many Great Wall attractions launched summer night tours. As dusk falls, visitors take the cable car up and discover another side of the ancient Great Wall through lighting, performances and interactive intangible cultural heritage activities. Away from the daytime crowds and heat, the Great Wall is no longer just a historical relic, but a new setting blending culture, leisure and



night-time consumption.

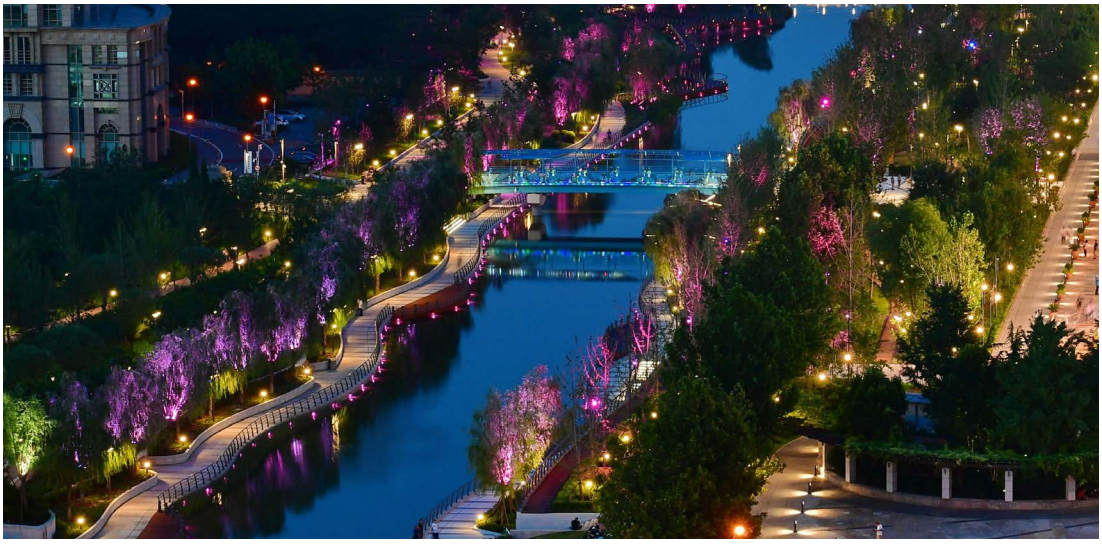
This shift reflects a key trend in global cultural tourism market: cultural heritage is transforming from a static sightseeing resource into an immersive experience product. Extending visitor stays and enriching spending scenarios through night tours, performances and intangible heritage showcases has become an important way for many international cultural destinations to enhance their appeal, and Beijing is deeply integrating this trend with its rich historical resources.

If the Great Wall night tours showcase an innovative expression of cultural heritage, cycling along the Central Axis represents another emerging way to travel. In recent years, guided cycling tours along the Beijing Central Axis have been increasingly popular with international visitors. From the Bell and Drum Towers to Yongdingmen Gate, visitors ride along the 7.8 km axis through the heart of the ancient capital, learning about the city's development. After hearing about the Beijing–Hangzhou Grand Canal and the history of Beijing's founding, an Italian visitor who has traveled to China many times said this see-as-you-go approach made history feel more three-dimensional; many visitors continue into the hutongs after the ride to try local food and everyday street life.

This reflects a change in international visitors' consumption preferences. Compared with traditional group tours, more and more travelers are seeking immersive experiences such as "City Walk" and "cycling exploration", hoping to build deeper connections with destinations at a slower, more immersive pace. For Beijing, with its deep historical heritage and rich neighborhood spaces, Central Axis cycling is becoming an important window for foreign visitors to understand Chinese culture and urban development.

- **An old yet new Beijing: half of its charm lies in the ancient capital, half in vibrant international metropolis**

If the Great Wall and the Central Axis represent Beijing's historical and cultural foundation, the Liangma River, known as the "Seine of Beijing", showcases the city's modern charm. Once an ordinary waterway, the Liangma River has become one of

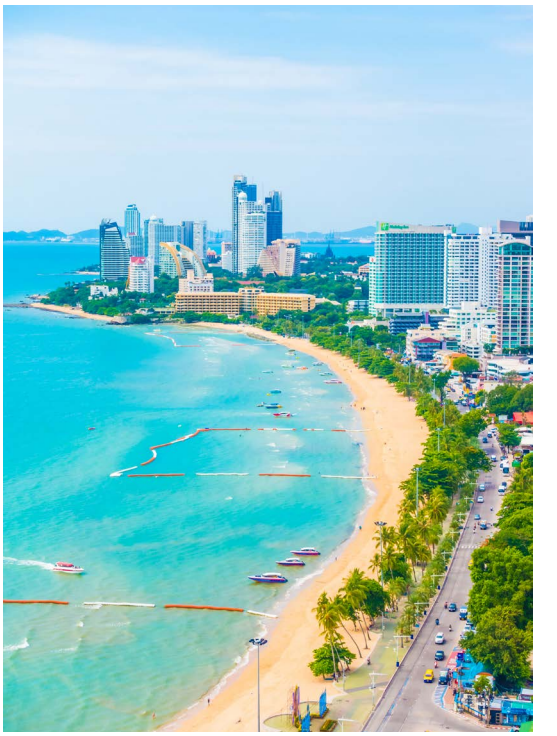


Beijing's most iconic night-time leisure spaces after systematic restoration and urban renewal, and was selected as one of UN-Habitat's Top 10 International Outstanding Practices. When the lights come on, cruise boats glide between bridges, lights and shadows, while restaurants, cafés and bars along the banks form a continuous stretch of dining and leisure, attracting large numbers of local residents and international visitors.

The Liangma River's popularity is not an isolated case. Globally, urban renewal is reshaping the spatial logic of tourism development. Where visitors once headed mainly to scenic areas and attractions, more and more cities are now turning waterfronts, public spaces and community neighborhoods into tourism experiences. What visitors consume is no longer just the scenery itself, but the urban lifestyle. The success of the Liangma River reflects this trend, and shows international visitors a more open, modern and vibrant side of Beijing beyond the ancient capital.

- **From sightseeing to experience destination**

Beijing's immersive travel experiences are underpinned by an ever-improving international service system. For entry, its pioneering "one-stop" transit visa-free model, with a dedicated temporary entry permit zone, enables clearance within half an hour. For payments, a "cards for large payments, QR codes for small payments, cash as a backup" system is in place: over 72,000 merchants accept foreign cards, card-to-wallet linking supports seven major card schemes, and Beijing's rail transit is the world's first to accept tap-to-ride with



all five major international card schemes across its network, at all hours and gates. For tax refunds, the pioneering "citywide tax refunds with one-stop service" and "instant tax refund upon purchase" cut processing to 2 minutes with on-the-spot refunds, with over 2,000 tax-refund stores across Beijing. More importantly, these measures let visitors immerse themselves in city life, shifting from "seeing Beijing" to "experiencing Beijing".

From Great Wall night tours that revitalize cultural heritage, to cycling along the Central Axis, to the urban renewal of the Liangma River, Beijing's appeal now extends beyond historic landmarks to a tourism ecosystem integrating culture, urban life and modern innovation. For more and more international visitors, Beijing is both a 3,000-year-old capital and a world-class destination to experience traditional and modern China alike.

- **Collaborating with International Organizations to Expand Overseas Promotion and Enhance Payment Convenience**

Since 2012, Beijing tourism authorities have consistently partnered with international organizations—such as Mastercard—to broaden international outreach and elevate Beijing's global standing as a tourism destination. The Beijing Municipal Bureau of Culture and Tourism, in collaboration with Mastercard, launched the "Priceless Beijing" campaign, which features a curated selection of tourism products for inbound visitors, promoted to Mastercard cardholders worldwide via the Priceless.com platform.

In September 2026, the Badaling Great Wall Park in Beijing partnered with Mastercard to establish China's first "World Cultural Heritage Inbound Payment Demonstration Site." This initiative offers inbound tourists a diverse range of payment options—including bank cards, digital wallets, and Scan-to-Pay through mobile camera—thereby facilitating inbound tourism and consumption.

Resort & Shopping Destination: Hainan

- **Hainan: accelerating toward an international tourism consumption hub through policy support and diverse experiences**

In 2026, Hainan is accelerating its transformation from an island resort destination into an international tourism consumption destination. In the first half of the year, inbound overnight visitors to the province exceeded 1 million for the first time, reaching 1.0007 million; total inbound spending reached US$740 million, up 72% YoY[2]. According to plans, Hainan's inbound visitor volume will reach 3.5 million by 2030[3]. As the development of the Hainan Free Trade Port deepens, Hainan is gradually building a new pattern of international tourism development underpinned by policy openness, resource endowments and consumption scenarios.



- **Policy advantages and expanded international routes continue to improve destination accessibility**

Hainan continues to lower barriers for international visitors and broaden its international source-market coverage by optimizing entry policies and improving its international transport network. Currently, citizens of 86 countries holding ordinary passports can enter Hainan visa-free. Combined with multiple facilitation policies such as 30-day visa-free entry and 240-hour visa-free transit, visa-free foreign arrivals reached 377,000 in the first half of the year, up 40.6% YoY. Meanwhile, Hainan has kept expanding its international air network. In H1 2026, international flights in Hainan reached 11,400, up 28% YoY, and international passenger throughput reached 1.4831 million, up 32% YoY[4]. Policy facilitation and route expansion have jointly broadened Hainan's international visitor base, with markets such as Malaysia, Indonesia and Myanmar growing rapidly. The continued diversification of source markets marks Hainan's gradual move beyond reliance on traditional regional markets toward a broader global visitor base.

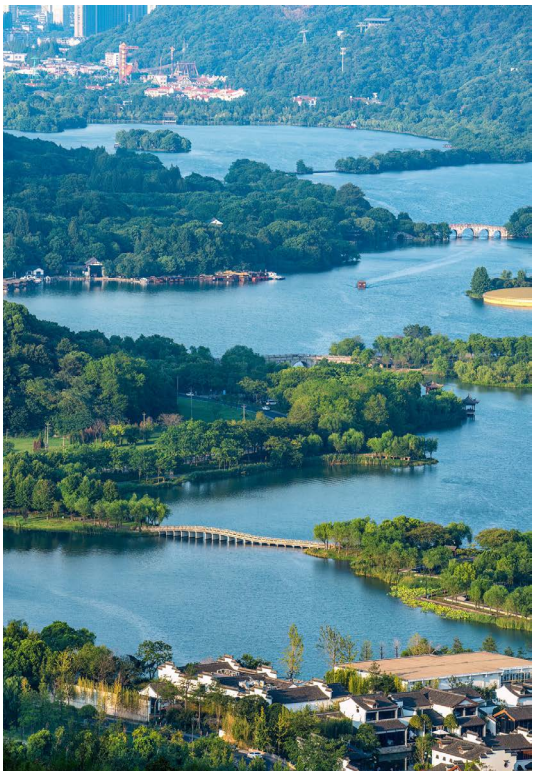
- **Integrating island ecology with distinctive culture to enrich resort consumption experiences**

Hainan's appeal is no longer limited to coastal resort resources, but gradually developing a multi-layered tourism product system that combines islands, rainforests, rural areas and ethnic cultures. Coastal areas leverage high-quality beaches to create core resort scenarios such as surfing, diving, yachting, beachfront hotels and specialty dining, while the central mountainous areas draw on the rich ecological resources of Wuzhishan, Qiongzhong, Baoting and Baisha to develop distinctive offerings such as rainforest hiking, cycling adventures, wellness retreats, agritourism, and Li and Miao ethnic cultural experiences. In 2026, Hainan further launched Tropical Rainforest Challenge, international cycling events, farming experience activities, harvest-season themed events and oxygen-rich wellness products, continually enhancing the participatory and experiential nature of its tourism products. Notably, the 17th Tour of Hainan International Road Cycling Race attracted 249 athletes from 37 countries and regions[5]. By deeply integrating natural ecological resources with sports, culture, wellness and other consumption scenarios, Hainan continues to upgrade its tourism products from simple sightseeing to immersive experiences, which not only helps extend visitors' length of stay but also drives growth in related spending on accommodation, dining, transport, leisure and entertainment.

- **Continuous improvements in duty-free shopping and service convenience turn tourist flows into incremental spending**

While enhancing its destination appeal, Hainan has also continued to boost visitors' spending conversion through duty-free shopping, consumer benefits and payment facilitation. Currently, Hainan's offshore duty-free policy grants each person an annual shopping quota of RMB 100,000. Since November 2025, offshore duty-free product categories have expanded from 45 to 47. As the Hainan Free Trade Port advances toward independent customs operations, the "zero-

tariff" policy is set to cover around 6,600 tariff items1, further unlocking room for consumption growth. In H1 2026, Hainan's offshore duty-free sales reached RMB 19.92 billion, up 18.8% YoY2, continuing to play a key role in driving tourism consumption. Meanwhile, Hainan keeps improving its international consumer service system. By the end of 2025, over 50,000 POS terminals accepting foreign bank cards had been deployed across the province[8]. With the continued expansion of international source markets, ever-richer consumption scenarios and the further release of Free Trade Port policy dividends, Hainan is steadily moving beyond visitor growth to higher-value tourism consumption, accelerating its development into an international tourism consumption center with global influence and a regional international tourism hub.



- **Partnering with International Organizations to Boost Inbound Tourism**

Hainan's tourism authorities have taken an innovative approach by collaborating with international organizations—such as Trip.com Group and Mastercard—to offer inbound travelers discounts on airfare and hotel stays. Furthermore, by leveraging the overseas networks of partners including Trip.com Group, Mastercard, InterContinental Hotels Group (IHG), and Accor, the province has effectively accelerated the growth of inbound tourism and related spending[9].

Where Tradition Meets Modernity: Hangzhou

Since 2025, Hangzhou's inbound tourism market has maintained strong growth. According to the Hangzhou Municipal Bureau of Culture, Radio, Television and Tourism, Hangzhou received 1.442 million inbound overnight visitors in 2025, up 26.45% YoY, and international tourism (foreign exchange) revenue reached US$1.40 billion, up 26.9% YoY. Among the major inbound destinations in China, Hangzhou has become one of the fastest-growing cities[10].

The growing buzz around Hangzhou on overseas social media stems not only from China's improved entry policy environment and the dividends of the 240-hour visa-free transit policy, but also from Hangzhou's advantageous location and its distinctive payment convenience. For foreign visitors, Hangzhou's appeal does not rely solely on natural scenery or a single city image, but on offering multiple experiences spanning Jiangnan culture, World Heritage and digital

economy. As a result, it has ranked among the top cities in the Chinese mainland for visitor satisfaction for several consecutive years and topped the Chinese mainland visitor satisfaction ranking in 2025[11].

- **From "one city with three World Heritage sites" to poetic living: the twin pillars of Hangzhou's cultural appeal**

Hangzhou is home to three World Cultural Heritage sites—the West Lake Cultural Landscape, the Grand Canal (Hangzhou section) and the Archaeological Ruins of Liangzhu City—making its "one city with three World Heritage sites" highly distinctive within the Chinese mainland. Yet for many international visitors, the real attraction lies not only in the heritage itself but in how it blends with contemporary life. In recent years, Hangzhou has also continued to turn its heritage resources into international tourism products, including themed routes such as "Discover 5,000 Years of China in Hangzhou", telling China's story to global visitors through Song Dynasty culture and intangible cultural heritage experiences. Meanwhile, immersive experiences built around the Longjing tea plantations, the Southern Song Imperial Street and canal-side neighborhoods are encouraging more foreign visitors to slow down and get to know local life through city walks, tea culture experiences and exploring distinctive neighborhoods.

What Hangzhou offers is not just heritage, but a poetic Eastern way of life—from strolling along West Lake to sipping tea in the Longjing tea plantations, from the bustling street life by the canal to leisurely moments amid moonlit lotus ponds. This city experience, combining cultural depth, lifestyle aesthetics and modern convenience, has become a representative window through which many overseas media and foreign travelers understand the "Chinese way of life", drawing international visitors not only for its World Heritage sites but also for a Chinese lifestyle that is at once traditional and modern, tranquil and vibrant.

- **Digital services shape a "future city" experience**

As a representative city of China's digital economy, Hangzhou continues to advance smart tourism and internationalized services. Innovative applications such as the "Hang Xiaoyi" AI agent, the "Zhejiang Travel" platform and the "Easy Go" service code provide international visitors with itinerary planning, multilingual consultation, payment and transport services, enabling "one code for all access". For many foreign visitors, experiencing mobile payments, smart mobility and digital consumption in Hangzhou has itself become an important part of understanding contemporary China.

Responding to visitors' need for convenience, Hangzhou has also launched a series of innovative measures. In 2025, it introduced a reform facilitating self-drive tourism for inbound visitors via license conversion and car rental: with online pre-review and fast-track airport processing, permits and car rental can be completed in as little as 15 minutes[12]. It has also continued to improve the departure tax refund experience and efficiency, with the "one-click tax refund" service cutting processing time to as little as 2 minutes. By the end of 2025, the number of departure tax refund stores citywide had risen to 292,



and departure tax refund sales grew 104.44% YoY[13]. From payments to tax refunds, and from urban transport to self-drive travel, Hangzhou keeps lowering the barriers for international visitors to travel and spend in China.

- **Where tradition meets modernity: shaping Hangzhou's unique appeal**

For many international visitors, Hangzhou's appeal stems not only from World Heritage sites such as West Lake, the Archaeological Ruins of Liangzhu City and the Grand Canal, but also from the modern lifestyle the city embodies. Here, history and culture develop side by side with the digital economy, allowing visitors to appreciate the profound heritage of Chinese civilization while experiencing the convenience and vitality of a modern Chinese city.

Building on this distinctive character, Hangzhou has continued its international communication and destination promotion efforts. In 2025, it invited overseas travel influencers and content creators to visit representative sites such as West Lake, the Archaeological Ruins of Liangzhu City and the Grand Canal, sharing their Hangzhou travel experiences through short videos, illustrated guides and other formats. Content centered on cultural experiences and city life has not only enriched overseas visitors' understanding of Hangzhou, but also further strengthened its appeal as an international tourism destination.

***Data Source:**

1. Beijing Municipal Bureau of Culture and Tourism;
2. Hainan Provincial Department of Tourism, Culture, Radio, Television and Sports;
3. People's Government of Hainan Province;
4. Hainan Provincial Department of Tourism, Culture, Radio, Television and Sports;
5. People's Government of Hainan Province;
6. Ministry of Finance of the People's Republic of China;
7. Xinhuanet;
8. Hainan Branch of the People's Bank of China;
9. Hainan Provincial Department of Tourism, Culture, Radio, Television and Sports;
10. Hangzhou Municipal People's Government;
11. Hangzhou Municipal Bureau of Culture, Radio, TV and Tourism
12. China News Service;
13. Hangzhou Municipal Bureau of Statistics

Chapter 6

Recommendations for Cross-Border Travel Development



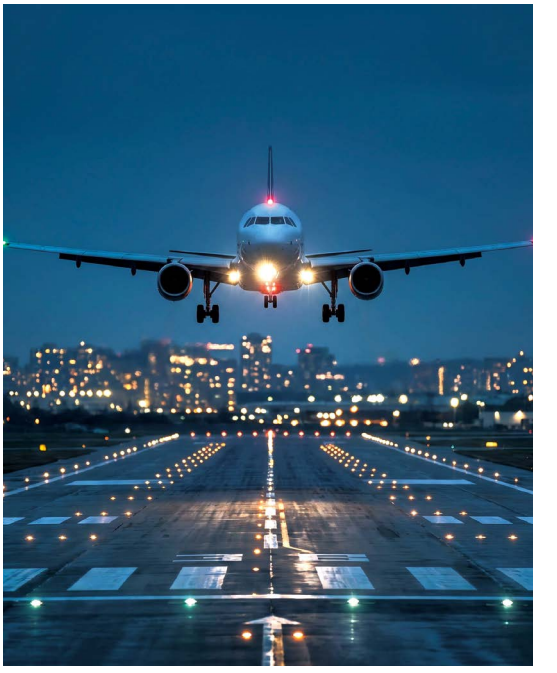
6.1 Outbound Travel Risks and Challenges

The global tourism market has, overall, moved beyond its recovery phase and is gradually shifting toward structural growth. At the same time, however, the international relations environment, the degree of visa facilitation and international flight capacity still largely shape travelers' willingness to travel and choice of destination, and thereby the pace of growth and quality of development of cross-border travel[1]. For destinations and the industry chain, whoever is first to reduce these travel frictions, enhance accessibility, and strengthen safety will be more likely to gain an edge in the next phase of competition for visitor flows. Accordingly, this section analyzes these issues across three dimensions: air route supply, visa policy and overseas safety.

1. Travel Challenges from Uneven Route Recovery

Although the global aviation market continues to recover, the recovery in capacity remains uneven, and insufficient route supply continues to pose a significant challenge for outbound travel. On the supply side, fuel price volatility, aircraft delivery delays and shortages of engines and key components[2] continue to constrain the release of global capacity. Airlines are more inclined to deploy limited capacity on hub and popular routes with more stable yields, so some emerging and niche destinations, even as their popularity rises, struggle to secure stable direct services in step.

Meanwhile, owing to the international situation and airspace adjustments, some long-haul routes have been canceled or rerouted. For travelers, this translates directly into reduced accessibility: more connections and longer layovers, which markedly extend overall travel time. Longer routings and higher operating costs in turn push up fares and incur additional expenses such as transit accommodation and rebooking after missed flights. Structural gaps in route supply are raising the time and financial costs of outbound travel.





2. Persistent Visa Constraints on Outbound Travel Potential

In recent years, the global trend toward visa facilitation has continued to deepen, with a growing number of destinations lowering barriers to cross-border travel through visa-free entry, visa on arrival and similar measures. The role of visa facilitation in stimulating travel demand has also been borne out in China's inbound market: in Q1 2026, border inspections of foreign nationals entering and leaving China rose 22.3% year on year, and nearly 8 in 10 foreign arrivals entered visa-free[3], indicating that visa facilitation can markedly shorten the travel decision-making chain and unlock cross-border travel demand.

For destination countries, visa facilitation has become an important policy tool for attracting international visitors. Destinations offering visa-free entry to Chinese travelers have continued to multiply in recent years, yet China's mutual visa exemption data show that visa facilitation for outbound Chinese travelers remains relatively limited: 29 countries have signed mutual visa exemption agreements for ordinary passports with China[4], fewer than the 57 countries covered by China's 240-hour visa-free transit policy[5]. Judging from China's experience of visa-free policies driving inbound growth, visa facilitation remains an important factor in shaping travel decisions and enhancing destination competitiveness.

3. Overseas Safety Challenges

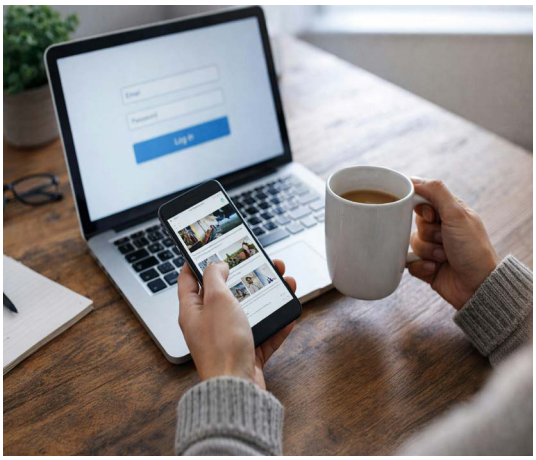
1) Geopolitical conflicts disrupting tourism markets in destination countries and surrounding regions

A recent global travel safety survey in which Mastercard participated shows that safety is the foremost consideration in Chinese travelers' cross-border travel decisions, with

geopolitical conflict risk having the most pronounced impact on destinations' safety image. Geopolitical conflict and political instability not only hit destination tourism markets directly, significantly reducing inbound arrivals (arrivals in some conflict-affected areas are projected to fall year on year by 11% to 27%[6]), but their impact may also spill over to neighboring countries and regions through airspace restrictions, route adjustments and regional security risks. Before departure, travelers should pay close attention to risk alerts issued by official authorities, assess travel risks soundly and adjust their itineraries accordingly.

2) Information security risks in digital travel services

Cyberattacks targeting the travel industry have increased significantly over the past three years[7], and generative AI has sharply reduced the cost of producing false content, amplifying the risk of fraudulent information spreading. When planning trips, travelers should be wary of links, advertisements and agency services from unknown sources, and give priority to the official platforms of airlines, hotels, travel service providers and





government bodies to obtain information and complete bookings, to reduce exposure to misleading information and transaction risks.

3) Overseas payment security

Unlike the familiar mobile payment environment in China (QR code scanning, payments via bank cards linked to digital platforms, etc.), payment security and personal data protection have become important factors shaping travelers' confidence when spending abroad. Compared with cash, bank card payments offer safeguards such as transaction dispute resolution; as card tokenization, chip cards and authentication technologies gain wider adoption, the risks of data leakage and card fraud are further reduced, providing more comprehensive security for travelers' cross-border spending.

***Data Source:**

1. Report on China's Inbound, Outbound and Domestic Tourism Market Sentiment, H1 2026;
2. IATA;
3. National Immigration Administration (NIA);
4. China Consular Affairs website (data as of May 29, 2026);
5. NIA (data as of August 20, 2026);
6. Oxford Economics;
7. Check Point

6.2 Inbound Travel Risks and Challenges

With the expansion of visa-free access, the recovery of international routes and intensified market promotion, the inbound tourism market continues to grow. As visitors' travel footprint and experience expectations continue to broaden, destination resilience, multilingual services, payment acceptance, departure tax refunds and digital adaptation still leave room for further optimization. This section outlines five risks and challenges that, to a certain extent, constrain further improvement of the inbound experience.

1. Geopolitical Risks and Destination Resilience Challenges

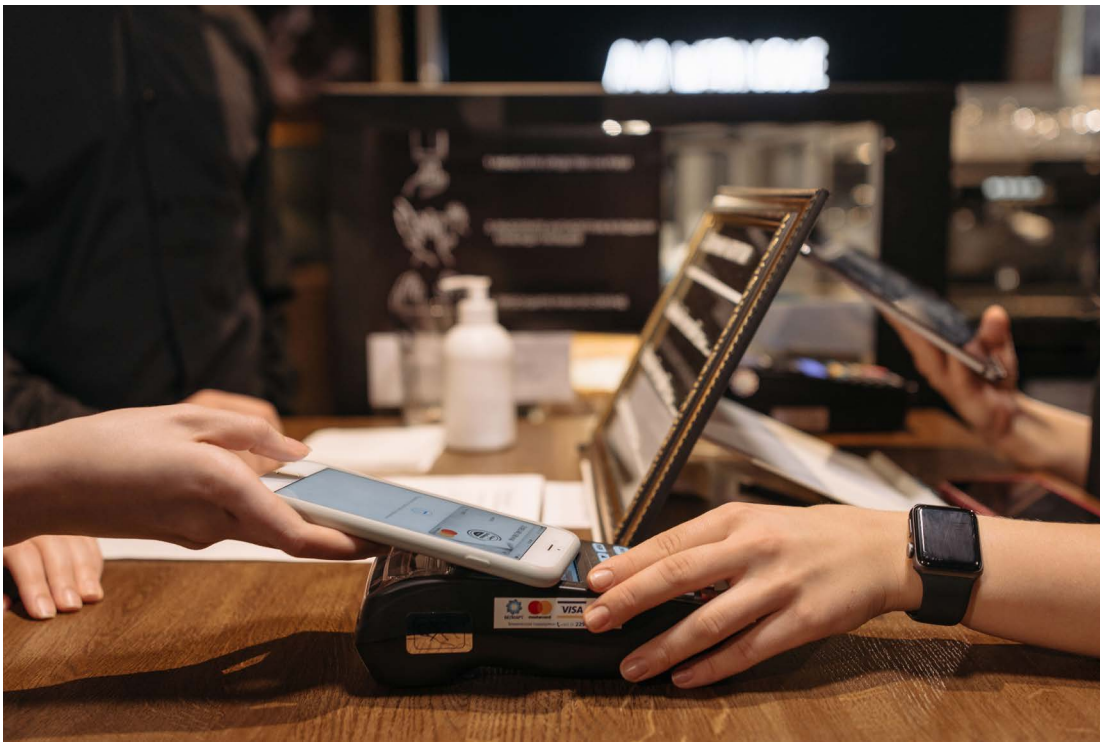
China's international route network continues to recover, underpinning inbound tourism growth. Some long-haul markets have rebounded strongly: the China–UK direct flight network continues to mature, and the 2026 summer-autumn season added further capacity on routes such as Qingdao–London1, giving UK travelers more options for visiting China.

Meanwhile, recovery on certain other long-haul routes remains subject to geopolitical shifts, airspace adjustments and aviation supply chain constraints, which may weigh on operating efficiency and the pace of route growth. Long-haul coverage, schedule stability and hub connectivity all need sustained improvement.

2. Gaps in Multilingual Services and Cultural Outreach

As inbound visitors venture beyond gateway cities to smaller cities and distinctive destinations, demand for multilingual





port-of-entry inquiries, scenic-area guides and online customer service continues to rise. Trip.com Group data show that the internationalization upgrade of scenic areas continues to roll out: more than 290 key scenic areas across China have deployed multilingual ticket-collection devices supporting 16 service languages2.

The level of coverage still varies across cities, scenic areas and service formats. Beyond expanding language coverage, the capacity for "cultural translation" remains a core challenge: the meaning carried by intangible cultural heritage, historic districts and local customs is often hard to convey accurately through literal translation of names.

Moreover, content shared on overseas social media is narrow in scope, focusing mainly on attraction recommendations. What is missing is well-rounded sharing of everyday experiences, such as technology, high-speed rail infrastructure, public safety, local customs, food and the arts. Short videos, local creators and authentic visitor word-of-mouth can help continuously turn content that interests overseas visitors into destination appeal.

3. Significant Improvements in Payment Convenience, Yet Room for Further Refinement

In recent years, efforts to enhance payment convenience have yielded notable results. The acceptance of bank cards and the e-wallets card-on-file have been steadily improved across major cities, transport hubs, and key tourist attractions, fueling a rapid rise in inbound tourism spending.

However, as inbound tourists increasingly venture into smaller cities, county-level

attractions, and local communities, there remains a need to extend payment convenience to a broader range of "long-tail" scenarios—such as homestays, small restaurants, specialty markets, and micro- or small-scale merchants—where payment acceptance infrastructure is still less convenient. Addressing these gaps will require more innovative payment solutions to offer inbound tourists a diverse array of options.

4. Untapped Potential of Departure Tax Refunds

Departure tax refund policy has drawn high-level attention. Measures introduced in 2026 further expanded refund store coverage3, advanced cross-regional mutual recognition of "instant tax refund upon purchase" and fully paperless processing, and, from July 1, 2026, introduced proportional spot checks for refund applications below RMB 10,0003.

However, refund store distribution, policy signage and the processing experience still vary by region. Some visitors cannot promptly identify refund stores before shopping or are unaware of requirements such as the minimum purchase threshold, customs verification and the time limit for departure. International awareness of new measures such as "instant tax refund upon purchase", cross-regional processing and e-documents has room to grow, and policy convenience has yet to translate fully into purchase intent and incremental spending.



5. High Barriers to Digital Services for Overseas Visitors

Scenic areas and travel platforms keep enhancing international services. Beyond key scenic areas supporting passport-based and group reservations for foreign visitors, travel platforms are also playing a part: Trip.com, for example, drove more than 8,000 scenic areas to add 63,000 ticket types bookable by foreign nationals, empowered Chinese hotels' international operations, and also set up inbound service counters at airports that have served over 66,000 visitors2.

However, some online service journeys remain fragmented. In e-commerce, local lifestyle services and transport, overseas visitors may still encounter limited support for overseas mobile numbers and repeated real-name identity verification. Better international adaptation of digital services, including broader passport and overseas mobile number support and tighter integration between platforms and local services, would allow inbound visitors to use digital services in the Chinese mainland more smoothly.

***Data Source:**
Xinhuanet, Trip.com Group Research Institute reports, Chinese Government Website (gov.cn), Mastercard Insights

6.3
Sustainable Cross-Border Travel: Observations and Reflections

As inbound and outbound travel facilitation continues to advance, cross-border travel is not only expanding in scale but gradually entering a new phase centered on quality and responsibility. This section examines key issues increasingly shaping whether it can advance steadily and sustainably.

1. Rise of Immersive Experiences: How Can Culture Remain Authentic?

The appeal of cross-border travel stems from the distinctiveness of culture and nature. As traveling like a local becomes a new trend, visitors are no longer content with checklist sightseeing, instead venturing into streets and communities for deeper local experiences. Heritage, too, is shifting from a static object to living culture to be engaged with and felt, as night tours of the Great Wall and cycling tours of Beijing's Central Axis make history tangible. Yet immersion has another side: as visitor flows concentrate in popular destinations, over-commercialization and wholesale replication of trending formats can easily dilute local cultural distinctiveness, with local character supplanted by homogeneous businesses. How to meet travelers' experiential needs while keeping culture



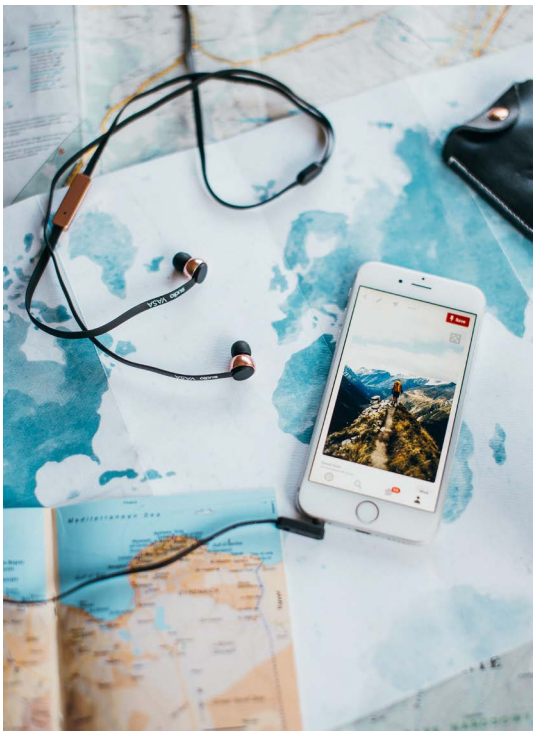
authentic, free of over-commercialization and homogenization, is a long-term question for the high-quality development of cross-border travel.

2. Concentrated Travel Demand: How Can Host–Guest Relations Be Balanced?

Cross-border travel demand tends to concentrate in a few destinations and limited holiday windows, readily creating pulse-like peaks in visitor flows. Such short-term overconcentration not only causes congestion and environmental strain but may also disrupt residents' daily lives. In response, some international bodies have proposed approaches: the European Travel Commission, for instance, promotes shoulder-season travel, steering visitors away from the midsummer peak toward lesser-known destinations for a more balanced year-round distribution. Meanwhile, as inbound flows extend from gateway cities to smaller cities and rural areas, distinctive homestays and rural tourism are bringing tangible local development opportunities, closely aligned with rural revitalization; ensuring residents genuinely benefit while attracting visitors is key to sustaining this dividend.

3. Green and Low-Carbon: How Can Ecological Pressure Be Reduced?

Amid the global green transition, tourism's ecological pressure is drawing growing attention. Transport, accommodation and catering are the main sources of carbon emissions. Meanwhile, the extensive use of single-use items in accommodation, together with food waste in catering, represents an easily overlooked source of resource consumption and environmental pollution.



Reducing single-use items, promoting reusable alternatives and serving food in appropriate quantities are becoming a consensus among a growing number of hotels and destinations. For cross-border travel, green and low-carbon development should not remain merely at the level of publicity; how to genuinely embed low-carbon principles across accommodation, transport, catering and other stages remains a long-term undertaking for the industry.

4. Cross-Border Data Flows: How Can Convenience and Compliance Be Reconciled?

While digitalization makes cross-border travel more convenient, it also brings new compliance issues. To personalize services, platforms often need to collect sensitive data such as travelers' location, preferences, itineraries, payments and even health. Once such data cross borders, for example



when overseas travelers access services in China from abroad or travelers' data are collected by foreign platforms, issues must be addressed, such as whether explicit consent has been obtained and whether only the necessary data are collected, while legal standards differ by country. With multiple national regimes coexisting, how to balance convenience and compliance, so that data can be both used and safeguarded, is an issue unique to cross-border settings and difficult to avoid.

5. Deepening AI Adoption: How Can AI Move from Recommending to Being Trustworthy?

AI is becoming deeply embedded in pre-trip planning and in-trip services, gradually evolving from a query aid into an assistant that shapes decisions and even acts on travelers' behalf. Yet in complex cross-border settings, its reliability is still being tested. AI-generated itineraries and visa and customs information may appear complete but not necessarily reflect the latest policies, and misjudgments from outdated information often carry greater risk than "having no information" itself; translation can help travelers speak up, yet may not understand the context and risks underlying scenarios such as medical care, customs and insurance; booking keeps getting simpler, yet genuine cross-border needs such as visa changes, flight delays and claims assistance often arise after booking, leaving service gaps. Moreover, as AI moves from providing information to making decisions on users' behalf, responsibility in the event of errors has yet to be clearly defined. As the AI applications chapter notes, the next stage of cross-border competition hinges not only on technological capability but, above all, on who can provide credible information, understand real scenarios and connect service processes, truly moving from "able to recommend" to "trustworthy."

***Data Source:**
National Immigration Administration (NIA); Mastercard Insights

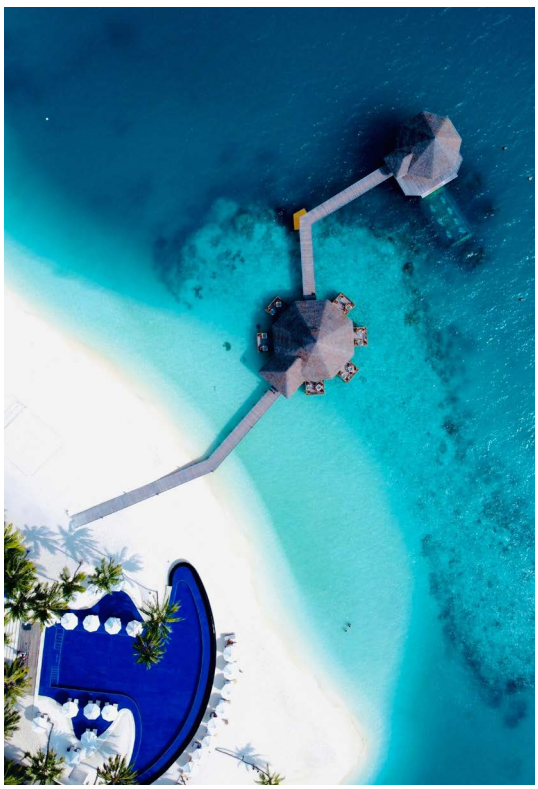
6.4 Recommendations and Outlook

Cross-border travel has moved beyond its recovery phase. As it moves toward normalized growth, what matters is not only visitor volume but, more importantly, service quality and the travel experience. For inbound visitors, payment convenience, language communication and shopping tax refunds are increasingly key concerns; for outbound travelers, route arrangements and visa costs also affect, to varying degrees, the release of demand. Meanwhile, beyond the growth in visitor flows and spending, whether green tourism and smart tourism can advance in tandem will also shape the sustainable development of cross-border travel.

1. Inbound: From Attracting Visitors to Retaining Them

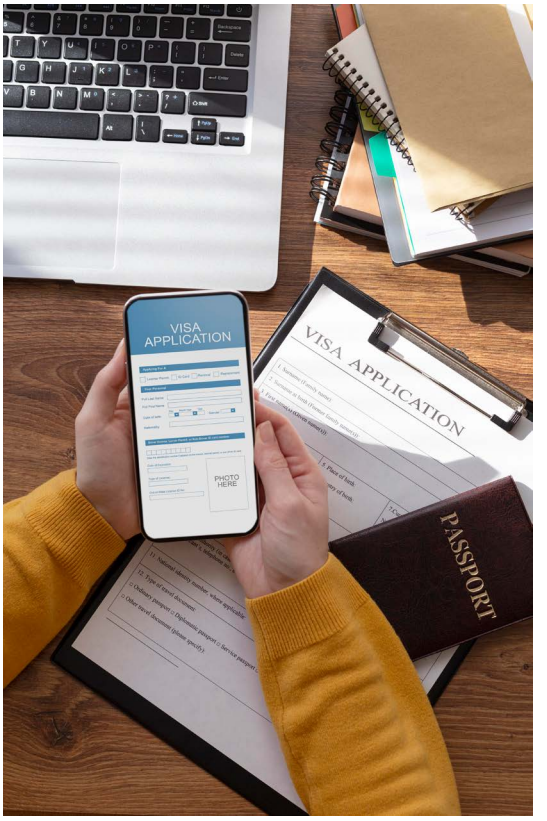
Payment. From 2019 to May 2025, the NetsUnion Clearing Corporation platform processed 379 million "foreign cards linked to domestic wallets" and "foreign e-wallets used in China" transactions worth RMB 60.44 billion, while average daily transactions in May 2025 rose 185% year on year[1]; the effects of payment facilitation are relatively evident. At the same time, the coverage of foreign card POS acceptance in lower-tier cities and among SMEs still has room to improve. Going forward, the key may lie not only in deploying more POS terminals but, more importantly, in diversifying acceptance methods, for example, rolling out low-cost, lightweight merchant-side solutions such as camera-based QR scanning and "card-and-QR-in-one" terminals, and keeping card, QR code, linked-card and cash payments available in parallel to suit the habits of visitors from different countries.

Tax refunds. Departure tax refunds act on the final link of the shopping journey and bear on whether visitors' willingness to spend translates into actual purchases; in response, the relevant authorities have successively introduced measures to facilitate them.



Driven by these measures and by policies such as payment facilitation and "Shop in China," there is still room to further integrate "travel" and "shopping" for inbound visitors: embedding shopping naturally in cultural experiences, city walks, distinctive commercial districts and nighttime consumption, while extending shopping lists from souvenirs to products that better reflect Chinese lifestyles, such as domestic brands, intangible cultural heritage products, time-honored brands and new Chinese-style apparel[2].

Language. The focus of language services is not only to ensure that visitors "understand the language" but, more importantly, to enable them to "understand China." Beyond expanding AI translation applications, local content such as intangible cultural heritage, ancient towns and urban culture must be accurately rendered in guided tours and interpretation, enabling not only smooth communication but also a deeper understanding of Chinese culture. To this end, further deployment of AI translation hardware (e.g., translation earbuds, AI glasses) merits exploration, alongside closing multilingual gaps in ticket booking, network access and city navigation, which are also frequent pain points for international visitors[3].



2. Outbound: From Being Able to Travel to Traveling Smoothly

Air routes. International route capacity continues to expand: in 2025, both passenger and cargo volumes on international routes grew by more than 20% year on year, and the opening of new traffic rights is further expanding the scope for long-haul direct flights; for example, after Hainan opened the seventh freedom of the air, the Sanya–Prague route made its maiden flight in December 2025[4]. Overall capacity growth, combined with continued optimization of traffic rights, provides more stable direct options for outbound travel.

Visas. Promoting mutual visa exemption and visa facilitation and enabling end-to-end online processing of exit-entry documents, can help lower documentation costs and shorten pre-trip lead times.

3. Sustainability: From Moving Fast to Moving Steadily

Green. Leveraging smart technologies to enable low-carbon operations, while also enhancing the international hospitality capacity of emerging destinations, may help ease the pressure of concentrated visitor flows.



Smart. As AI development accelerates, AI-enabled tourism has become an irreversible trend, its value lying chiefly in lowering communication and information barriers. Going forward, these capabilities should be integrated more deeply into inbound services and destination operations, rather than remaining limited to single visitor-side applications.

4. Outlook: The Next Five Years

Looking to 2030, China has explicitly set inbound tourism targets: 190 million inbound visits and total spending exceeding US$150 billion[5]. In China, the strategic position of tourism continues to rise: it not only serves as a key sector for stimulating consumption and expanding employment but also shoulders important responsibilities for promoting international exchange and enhancing China's international influence[5].

For the global tourism industry, this means a market of considerable scale is not only expanding its own openness but will also engage more extensively in international collaboration. The next five years of cross-border travel offer a shared prospect well worth anticipating.

***Data Source:**

1. China Economic Net;
2. Notice on Further Optimizing Departure Tax Refund Measures to Expand Inbound Consumption;
3. Trip.com Group Research Institute report;
4. Civil Aviation Administration of China (CAAC);
5. 15th Five-Year Plan for Building a Strong Tourism Country

Contributors to the Cross-border Tourism Consumption Trends 2025-2026



WORLD TOURISM ALLIANCE

Sponsor: World Tourism Alliance

On September11 , 2017 , the world Tourism Alliance(WTA) , a comprehensive, nongovernmental international tourism organization initiated by china, held its inaugural ceremony in chengdu, Sichuan Province, China. LiKeqiang, then Premier of the State Council of China, sent a congratulatory message on the establishment of the WTA.
Guided by its vision of"Better Tourism, Better Life, Better world'"and its mission of Tourism for Peace, Tourism for Development, and Tourism for Poverty Alleviation, the WTA is committed to promoting connectivity, mutual benefit, and shared prosperity across the global tourism industry at the non-government level. The WTA's membership spans multiple sectors across the tourism industry, encompassing influential tourism enterprises, national and regional tourism associations, tourism destinations, and research institutions from around the world. Positioning itself as a serviceoriented international organization that places members'need at itscore, the WTA aims to provide its members with a platform for dialogue and exchange, resource sharing, and collaborative development.
The WTA's Headquarters and Secretariat are located in China.





Author: Mastercard

Mastercard (NYSE: MA) is a global technology company in the payments industry. Our mission is to connect and power an inclusive, digital economy that benefits everyone, everywhere by making transactions safe, simple, smart and accessible. Using secure data and networks, partnerships and passion, our innovations and solutions help individuals, financial institutions, governments and businesses realize their greatest potential. Our decency quotient, or DQ, drives our culture and everything we do inside and outside of our company. With connections across more than 210 countries and territories, we are building a sustainable world that unlocks priceless possibilities for all.



Trip.com Group™

Supporter: Trip.com Group

Trip.com Group is a leading online travel service provider. Its brands include Trip.com, Trip.com Group, Qunar, and eLong. Trip.com Group is able to integrate complex travel-related information and provide travel product booking and services through its advanced mobile apps, websites, and 24/7 free customer service centers, helping business and leisure travelers access information and reduce costs. Since its establishment in 1999 and IPO on NASDAQ in 2003, Trip.com Group has grown rapidly and has become one of the largest travel service providers in the world.