

Summer 2016



Scotland China-Ready Tourism Guide



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China's fast-growing visitor market, increased direct flights to the UK and a simplified visa process is great news for Scotland's tourism industry. Is your business China-Ready?

Ni Hao!
Hello!

\$128.6 billion

China is the world's most valuable source market for international tourism, worth US\$128.6 billion in 2013.

Ni Hao. Or Hello!

China is growing as a tourism source market for Scotland with double-digit growth since 2014. Global predictions for the Chinese outbound traveler suggest that this is just the beginning...

The next ten years will see China's population demographics have a huge influence on international travel. Travelers aged 35 – 60 and working-age 'empty nesters' are forecast to become one of the fastest growing demographic segments for outbound travel. The young, affluent middle class could become the biggest driver of travel demand, a segment forecast to grow to 500 million by 2025.

While China's leading cities (Beijing, Shanghai and Guangzhou), and their surrounding regions are the source of most outbound travel, second-tier cities are now also establishing themselves as travel demand centres. Whilst the main destination for Chinese Tourists is Asia, there has been rapid growth towards European Destinations and North America. The bulk of travel to Europe by Chinese tourists takes place between May and September.

Edinburgh is already the second-most visited destination in the UK for Chinese visitors after London - ahead of Manchester, Oxford and Cambridge. International Passenger Survey (IPS) statistics reveal there were 33,000 Chinese Visitors to Scotland in 2014. However, this number is only part of the picture because many Chinese visitors arrive and depart from London as part of organised coach tours.

Over 100,000 Chinese nationals went through the turnstiles of Scotland's most visited paid attraction, Edinburgh Castle, that same year. And with an average spend four times greater than other tourists, according to a VisitBritain study, Chinese visitors are already the most important customer group for a growing number of savvy Scottish retailers.

To Chinese people, Scotland is a spectacular, scenic and safe destination with fascinating history, unique culture, breathtaking countryside and a warm welcome from its people. Like with any market, this welcome is founded on mutual understanding, respect and pride in our destination.

This Scottish Development International guide will help you get to know Chinese visitors and their culture – and the simple steps you can make to understand and develop the Chinese market for your business.

China's importance across the global tourism, talent and trade agenda has already seen Scotland's businesses, universities and artists forge strong trade, knowledge and cultural links. With more flights in to the UK, extended and simplified visas and double-digit visitor growth - there's no better time to become 'China-Ready'.



Why focus on China?

£62m

→ Worth £62m in 2014, China is in the top 5 growth markets for Scotland.

1st

→ Edinburgh is the most visited destination in the UK for Chinese visitors, outside London.

9,000

→ There are approximately 9,000 Chinese students studying in Scotland.

2020

→ For the first time ever, the Royal Edinburgh Military Tattoo plans to take its iconic Scottish spectacular, including a full-scale replica of Edinburgh Castle, on tour to China.

4x

→ Chinese visitors to the UK spend four times more than average (£2600 per visit).

100,000+

→ There were over 100,000 Chinese nationals counted through Edinburgh Castle's turnstiles in 2014.

2

→ Edinburgh is the only city in the UK to have been chosen by the Chinese Government to care for two giant pandas, creating a unique link between Edinburgh and China.

\$128.6 bil

→ China is the world's most valuable source market for international tourism, worth US\$128.6 billion in 2013.

7%

→ In 2014, Chinese visitor numbers to National Museums Scotland more than doubled, from 3% to 7% of overseas visitors.

20million+

→ As part of Edinburgh's Hogmanay 2015 celebrations, six influential travel bloggers came to Scotland to share their experiences on important blogs and social media sites back home. So far, the content has been viewed more than 20m times.



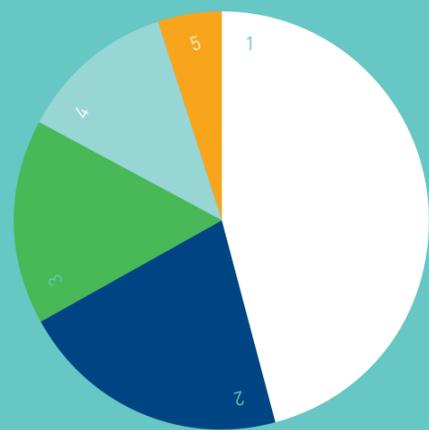
The Chinese visitor market

Visitors from China to the UK (IPS, 2014)

- International travel is quickly gaining popularity amongst the middle class – global travel, and in particular visiting well-known places and landmarks, is a status symbol.
- Dramatically increasing numbers of luxury travelers and Gen Y/millennials aged 35 and below (see graph top right) are seen as key to Chinese tourism trends globally.
- Shopping is also very popular, and many Chinese travelers may often economise on travel and accommodation so they can spend more on gifts and experiences.

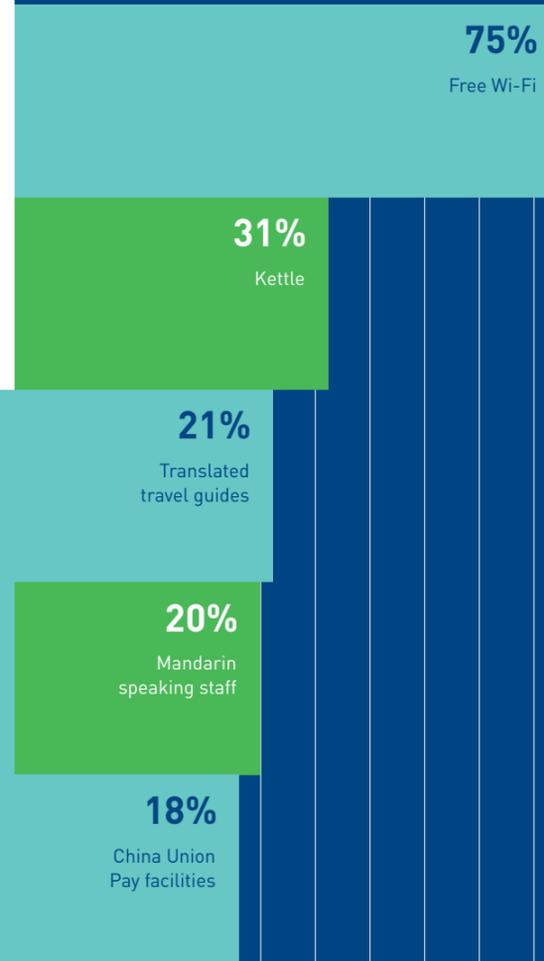
185,099 Total visits to UK
4.49m Total nights to UK
24.2 nights Average length of stay in UK
£498m Total spend in UK
£111 Average spend per day
£2,688 Average spend per visit

Purpose of visit



1 **46%** Holiday
 2 **21%** Business
 3 **16%** VFR
 4 **12%** Study
 5 **5%** Other

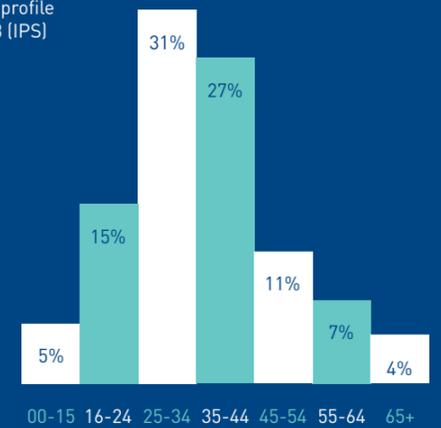
Most common requests received from Chinese guests



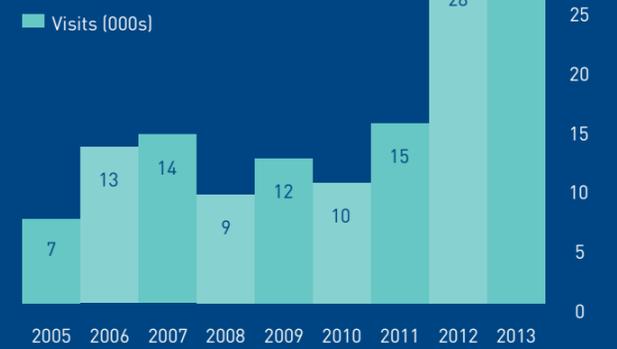
17%
2014

50%
2015

Visitor Age profile 2011 - 2013 (IPS)



Volume Trend (Scotland) 2005 - 2013 (IPS)



Travel bookings made by mobile phone are soaring

Digital and mobile is hugely important for Chinese visitors, 75% of Chinese tourists rely on reviews and word of mouth via Chinese blogs, websites and social media platforms.

They use different tools such as Weibo [a cross between Facebook and Twitter] or WeChat [like WhatsApp]. They can't access Google and mostly use a search engine called Baidu instead. Rather than creating and managing Chinese accounts, don't underestimate the power of encouraging your Chinese visitors to share your product or business on their social networks.

Top tips

There are so many differences between Scottish and Chinese culture that you may feel that truly accommodating Chinese visitors is a daunting or expensive task. But with these simple tips, you can take the first steps to becoming China-Ready; and implementing even just one recommendation could put you ahead of the competition.



→ Use pictorial or translated signage.



→ Use both hands when exchanging business cards, receipts or hotel documents as a sign of respect.



→ Remember: At the end of the day, it is about service and understanding – the cornerstones of a great Scottish welcome – as you offer them some home comforts whilst giving them opportunities to try new things in a world-class destination.

General

- China is a vast, changing, multi-ethnic country with different traditions, so your efforts should be flexible and targeted. Whilst luxury travelers and younger travelers are seen as key trends, take time to understand the socio-demographic profile of your own existing Chinese visitors and adapt to suit.
- Language is one of the main challenges, but download and practice using translation apps such as Baidu Translate (which can translate speech, text or pictures) or Google Translate.
- Never underestimate the power of a pictorial sign – no smoking, photo stop, drinking water etc., or visit the VisitScotland site to download simple signs in Mandarin.
- Many Chinese tourists research brands, places, products and prices prior to departure. If Chinese customers are an important segment for you, reach them before they leave China by setting up a profile on social media like Weibo or WeChat and check out (with the help of the translate button) your customer reviews on China's Tripadvisor-style websites CTrip and Xia Yi Han
- Travel trade links are important, with a large number of tourists still visiting in organised groups. Be sure to connect with VisitScotland and VisitBritain who can advise you on opportunities to promote your product to agents and tour companies via their marketing channels or sales missions.
- UnionPay is the payment card for most Chinese travelers (who don't have Visa or Mastercard). Like most tourists, they prefer not to carry large amounts of cash. Check with your bank or card merchant or visit www.moneyswap.com to look at opportunities for accepting UnionPay at your business.
- Respect and status are pillars of Chinese culture, so when exchanging business cards, hold your card with both hands and with your personal details facing the recipient. In return, take time to read their card closely before putting it in your wallet/pocket. Likewise, when handing over passports, hotel accounts and shopping receipts use both hands rather than one as a mark of respect.



Eating & Drinking

- Meal times in China tend to be earlier than in the West. Typical meal times are Breakfast (from 6.30am), Lunch (from 11.30am) and dinner (from 6pm). Breakfast is the most important meal of the day for Chinese visitors – and usually a substantial, hot breakfast. Getting the breakfast right will win over your Chinese customers.
- Don't worry if you're not able to prepare Chinese breakfast (such as congee or steamed buns). Consider providing instant pot noodles as a breakfast choice (easy and cheap from the speciality aisle of larger stores or Chinese supermarkets) which Chinese visitors will customize with other breakfast items, such as cold meats and boiled eggs.
- Hot water is a key drink for the Chinese, asked for at almost every mealtime and considered to have huge health benefits. Tea is also very popular, but mostly Green Tea or Herbal Teas rather than Western black or breakfast teas.
- Visiting bars is not a hugely popular pastime with Chinese tourists. Most Chinese visitors only drink alcohol whilst eating their evening meal, if at all.
- Trying and purchasing whisky, however, is very popular – and Chinese visitors want to hear about the history, heritage and popularity of whisky (especially if it is linked to famous or important whisky lovers).
- Chinese guests are keen to try new dishes and different styles of eating, but also like a degree of familiarity to enjoy their travel experience. Something as simple as ensuring there is an option with rice on your menu will make them feel at home. Note that many Chinese are lactose intolerant, so sauces heavy with cream or other dairy products are best avoided.
- It's not unusual for Chinese guests, especially those staying more than a night or two, to seek out Chinese cuisine after trying Scottish food and drink.
- Where menus are not provided in Mandarin, consider providing a separate picture menu to break language barriers.
- Like most tourists, they use apps and websites to seek out the most popular dining opportunities. Photographing and sharing their experiences and dishes are not uncommon.
- It is not normal practice for Chinese diners to tip restaurants in China.



→ Breakfast is the most important meal of the day for the Chinese



→ Provide hot water – the preferred health drink!

Accommodation

- Prepare a welcome letter in Mandarin from the General Manager. You can download a sample letter from the VisitScotland.org website.
- If possible, provide your Chinese guests with a Mandarin version of your 'services and facilities' (outlining mealtimes, check out times, wifi, smoking policy etc).
- The numbers 8 and 888 are lucky numbers in China, so where possible, allocate rooms with either of these numbers to your Chinese guests. (It's no coincidence that the Beijing Olympics started at 8.08pm – and 8 seconds – on the 8th of August 2008). Avoid allocating room or floor number 4 as this is seen as an unlucky number (in Mandarin the word four is similar to the word for death).
- Status is hugely important, so allocate the best rooms to the most senior person(s) of the group and ensure this is clearly acknowledged at check-in.
- Smoking is still far more common in China than the UK, and in China nearly all hotel rooms are smoking rooms. To prevent confusion, provide clear signage for guests in Chinese explaining your non-smoking policy, and signpost any smoking areas if you have them.
- Wifi access is very important to all travellers and to Chinese visitors in particular. If you can, provide the login/access instructions in Chinese. In return, you guests will share their experience via Chinese social media channels including WeChat and Weibo
- If you are able to provide a selection of Chinese branded products at reception or in your welcome tray, your Chinese guests will highly appreciate it. For example, Chinese brand green tea and instant noodles are readily and cheaply accessible online or at local Chinese supermarkets.
- A kettle with bottled still water is also popular: Chinese visitors love hot water and back home can't (and don't) drink water from a tap.
- In Chinese 3* hotels and above, toiletries (including toothbrushes) are complimentary and provided in the room. They expect the same from your hotel, so if you only provide some items on demand, mention this in your welcome letter. Slippers are also very common in Chinese hotels – they would rather not walk around only wearing socks.



→ Stock up on some simple items from local Chinese supermarkets.



→ Allocate rooms containing the number 8. Avoid rooms or floors containing the number 4.

Visitor Attractions

- Chinese visitors love to take photographs, so creating photograph/scenery stops is an ideal way to promote your attraction (and including your attraction's name beside designated photostops/statues ensures more publicity). Where photographs are not allowed to be taken, it is important to state so clearly in language or using visual signs.
- If your attraction has lunch/dinner facilities on site, make the travel agency and guide aware of this.
- Invest in imagery that shows Chinese visitors enjoying your attraction or product.
- Scotland's Chinese student population is significant and growing. Targeted promotions to these students, especially at significant moments for the Chinese (such as Chinese New Year) will help them discover your attraction; and encourage repeat visits if they return with their friends and family.
- Bookings for attractions tend to be made last minute. Prepare to be flexible and where possible, provide fast track lanes for large groups who are most likely on a tight schedule.
- Celebrities and superlatives are key selling points for Chinese visitors. If you've welcomed any celebrities or Heads of State to your attraction, especially Chinese or international film stars or members of the British Royal Family, share this with your group as it will be a status symbol. Likewise, superlatives (Scotland's largest, Glasgow's oldest, Scotland's first ever..) are important facts that Chinese visitors will share back home to demonstrate the importance and significance of their trip.
- Likewise, superlatives (Scotland's largest, Edinburgh's oldest, Scotland's first ever..) are important facts that Chinese visitors will share back home to demonstrate the importance and significance of their trip.
- If your attraction has an audio guide system, consider having a Chinese version made. Audio guides are relatively popular at attractions in China, so will be a familiar way of sightseeing.



→ Create and signpost photo opportunities.



→ Emphasise celebrity or royal links.

Retail

- The Chinese love shopping and enjoy buying souvenirs, tartan, whisky, cashmere and luxury brands when in Scotland. They are motivated by the tax refund opportunities for their purchases – visit www.globalrefund.com.
- The Chinese are not typically familiar with Scottish brands and lean towards global luxury consumer goods. Tell the story of your brand while emphasising authenticity, quality and heritage and, where appropriate, the high level of craftsmanship of the brand.
- Items clearly "Made in Scotland" are popular as proof back home of their global adventures. For the same reason, they generally won't buy items "Made in China".
- Gifts are a hugely important part of Chinese culture and it is not rare to see Chinese customers purchase several identical items as presents for friends, family or business relations. Incentivising such purchases through a bulk discount or sliding scale for multiple purchases would be very well received by Chinese visitors.
- Given the importance of gifting, and only if you can, offer small, free gifts with medium to larger purchases. This helps show appreciation of Chinese culture and also confers special status on the recipient – a very important feeling for Chinese. It could be something as simple as a pen or a key ring with your logo.
- Significant Chinese holidays such as Chinese New Year (see p13 for more details) are great opportunities for targeted promotions and store discounts.
- Most Western sales techniques involve familiarity and warmth, but Chinese shopping is more about status and the transaction itself. Avoid personal questions or unnecessary jokes when communicating with your Chinese customers, which may be seen as a lack of respect.
- In a country of 1.5 billion people, it's the norm for retail assistants to serve multiple customers simultaneously. Therefore, it's not uncommon for some Chinese customers to try and interrupt while serving another customer.



→ Whisky, cashmere, luxury items and "Made In Scotland" souvenirs are hugely popular



→ Remember that gifts and gifting are a huge part of Chinese culture.

When the Chinese meet Scotland

The view from Calton Hill.



April Tsai helps you understand Chinese visitors, and shares her first hand experiences of welcoming and supporting Chinese students and visitors to Scotland.

What do Chinese people like about Scotland?

In my experience, visitors love the fresh air, the architecture, the history and tradition, the festive atmosphere all year round, the friendly and polite people, the landscape. Many people also connect Scotland with big movies in China like Harry Potter, James Bond or One Day (which was set in the capital).

Indeed, lots of people already have a romantic perception of Edinburgh because of its name. In Mandarin the name ài dīng bǎo! translates literally as Love-People-Castle! There were also many rumours that Chinese superstar Jay Chou – our Justin Bieber, if you like – got married there.

What do your Chinese students and visitors find hard to adjust to?

We don't really have a bar culture, so it can be difficult to find things to do in the evening (other than go to Primark!). We do find the business opening hours quite strange.

And the food! Lots of people assume we will want to eat only Chinese food, but that isn't true. The main difference is that our eating habits are very different. In China, we have a saying: "Breakfast like a Queen, Lunch like a Noble, Dinner like a Servant", so it is very unusual for us to only have cold sandwiches for lunch and a huge meal at night!

We also love hot water, but get some odd looks when we keep asking for it. In China, it is the number one health drink. Not cold water, and definitely not with ice – in China we don't think you should waste your body's precious energy warming up cold water.

How important is shopping?

Very! It is a lot cheaper for us to buy luxury items, like branded bags or watches, outside of China. We are huge fans of the big luxury brands, and especially the designer outlet villages! Gifts are also really important – for parents, sisters, classmates, the dog, the neighbour's cat... It's an important part of our culture and also a way of sharing your travels with people back home.

What do you miss when you are in Scotland?

We will communicate with family and friends a lot, mostly via social media nowadays, whilst on our travels giving them detailed accounts of our activities and experiences. Many students also miss family at key cultural times of the year for the Chinese such as Chinese New Year (also called Spring Festival, normally a week long celebration around February 6th in 2016), the Winter Solstice (usually on either the 21, 22 and 23 December) and "Golden Week" – the big vacation week in China from the 1st October, China National Day. Events, promotions or even a sign recognising a special Chinese holiday will go down very well with the Chinese visitors!

What can you tell us about Chinese visitors?

Many visitors are very keen to learn about Scotland and meet Scottish people but are worried about how they come across and not knowing English very well. And then I learn that Scottish businesses are worried about not being able to properly accommodate Chinese visitors or speak Mandarin! So I think the main thing is to appreciate that it is about a meeting of cultures. In China, there is a lot of publicity about tourists' behaviour overseas. Queuing is not a Chinese concept – at all! – and our volume is a sign of excitement and enjoyment, not rudeness! With such a big population back home, we have to behave differently in shops and attractions to get served or seen, so we do have to adjust when we come to somewhere peaceful like Scotland.

What do visitors like to do when in Scotland?

For this question I visited the Chinese equivalents of tripadvisor called CTrip and Xia Yi Han. Edinburgh is a key stop for sightseeing, but I think more and more people are using it as a gateway to the Highlands. We like to pack in as many of the major attractions and historic sites and castles as we can, soaking up some of the nature, vast open spaces and wonderful Scottish legends. We take pictures everywhere (and with every meal) and enjoy trying unique, authentic cuisine – especially if it's in a traditional Scottish pub. Business travellers will usually play golf – a growing sport in China with many courses being built. Many of the coach tours will also stop off at Gretna outlet on their journey back down to England (for the Lake District and beyond).

April is the Programme Coordinator of English as a Foreign Language at the Edinburgh Institute, part of Edinburgh Napier University. A former postgraduate student studying Advertising & Marketing in Leeds, she was attracted by the beauty of Edinburgh and moved here after finishing studies and now oversees up to 500 Chinese students every year. Edinburgh Napier University is one of the Leading Summer School/Short Course Providers in Scotland.

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Love People Castle!

→ Ài dīng bǎo! The literal translation of Edinburgh in Mandarin.



Meet the Chinese Visitor

Handy profiles of the three largest Chinese visitor segments to Scotland.

Group traveller

- I'm 44+ years old
- I spend £2,073 per trip
- I'll stay in a 3*-4* hotel
- Travel period: July-September
- Travel purpose: 70% leisure
- 8-14 nights (35%)
- Either employed or retired
- I rely on the trade to book all aspects of my trip, but expect to see all the main sights. I see a lot, quickly
- We're on a tight schedule – using a coach to get from place to place
- I travel with a large group (but don't know them all)
- My English is limited
- Meal times are important. I like a warm breakfast and will try different local food but I will eat more Chinese food than local food.

TOP TIPS for attracting this market:

- Build relationships with buyers and agents (with help of VisitScotland and VisitBritain) and have a factsheet/brochure in Chinese language.
- Participate in travel trade fairs (eg Destination Britain China or the International Luxury Travel Market: see visitscotland.org).

FIT traveller

- I'm 25-44yrs
- I spend: £2,336 per trip
- I'm most likely to visit from July-September (44%)
- I'm a recent graduate, starting my career
- I'll stay 15+ nights and save on accommodation for experiences and shopping
- I travel with a small group of friends and/or family
- Time is less important. We may do some small tours or book internal travel ourselves
- My English is pretty good
- Meal times are important. I like a warm breakfast and will try different local food for dinner. Depending on how long I stay, I might want some Chinese food during my holiday as well
- I like sightseeing, history, beautiful scenery, film locations, the seaside, soaking up local culture.

TOP TIPS for attracting this market:

- Promotions: simple, targeted efforts to extend a special welcome to Chinese customers, such as Chinese pages on your website or special promotions at significant times of year (such as Chinese New Year).
- Social media: setting up your own Weibo/Wechat accounts for example, or encouraging Chinese visitors to review and recommend your product on social media and Tripadvisor-style platforms like CTrip.

Student

- I'm 20 - 22yrs (Undergraduate) or 22+yrs for PHD and PostGrad students
- At the start of my stay in Scotland, I'll do a marathon visit of all the main attractions to soak up my new home
- My first impressions: History, Whisky, Bagpipes, the Scottish Highlands
- During free time I'll shop, watch TV at home, read blogs, cook at home, with friends (other Chinese students)
- I'll eat at Asian restaurants, make a hot pot with friends or eat at home
- I'll have time off at Easter and Christmas break when I'll visit friends studying in other UK cities or European destinations, or they'll visit me
- My lasting Impressions: Beautiful and peaceful place to stay, very cold and windy, limited outdoor entertainment choices
- I may try and get part-time work while I'm here – to either subsidise studies or meet new friends. I'll most likely work in Asian restaurants/takeaways, Cashmere/souvenir stores (esp on Royal Mile) or at the University
- VFR visits: 53% of students receive at least 1 visitor per year, generally for 2-4weeks (1 week spent in Edinburgh and then off to other cities in the UK, especially London, and other European countries).

TOP TIPS for attracting this market:

- Collaboration: connect with the international office of your local college or university to see if you can offer special promotions or invitations to their students to welcome them to Scotland. They may also be able to circulate job opportunities if you wish to employ Mandarin-speakers on a part-time basis.
- Promotions: make simple, targeted efforts to extend a special welcome to Chinese students, such as Chinese pages on your website, welcoming posters in your window aimed at Chinese visitors or special promotions at significant times of year (such as Chinese New Year).

A number of local, national and UK-wide organisations are able to help.

Key cities from which Chinese tourists travel to the UK
→

- 1 Beijing
- 2 Shanghai
- 3 Chengdu
- 4 Guangzhou

Top cities visited in UK
→

- 1 London
- 2 Edinburgh
- 3 Manchester
- 4 Oxford
- 5 Cambridge

Additional Resources and Support

Scottish Development International

Scottish Development International is a partnership between the Scottish Government, Scottish Enterprise and Highlands and Islands Enterprise. It attracts inward investment to Scotland and assists Scottish based companies to trade overseas. SDI's team of experts draw together in-depth industry and geographic knowledge to help foreign companies access Scotland's research expertise, deep and varied talent pool, world class universities and abundance of natural resources. SDI also works to deliver mutual benefit to both Scottish and foreign economies by identifying opportunities for Scottish companies to expand their operations globally, through direct investment and partnerships with other countries. For more information visit www.sdi.co.uk

VisitScotland

Scotland's national tourism agency has helpful online resources, featuring market statistics and insights as well as useful and practical tools like downloadable signage and welcome letters. They are also a key partner for your travel trade strategy – maintaining strong links with major operators and undertaking annual sales missions to key Chinese cities. For more information, find the China Toolkit and visitor research on www.visitscotland.org

Scottish Government

The Scottish Government has offices in China and facilitate or coordinate political, business or tourism engagement in China. They also manage Scotland's Chinese website and social media accounts – sending them content or press releases targeted at Chinese visitors is an effective way to ensure your brand is featured on influential Chinese digital platforms. For more information visit: www.scotland.cn

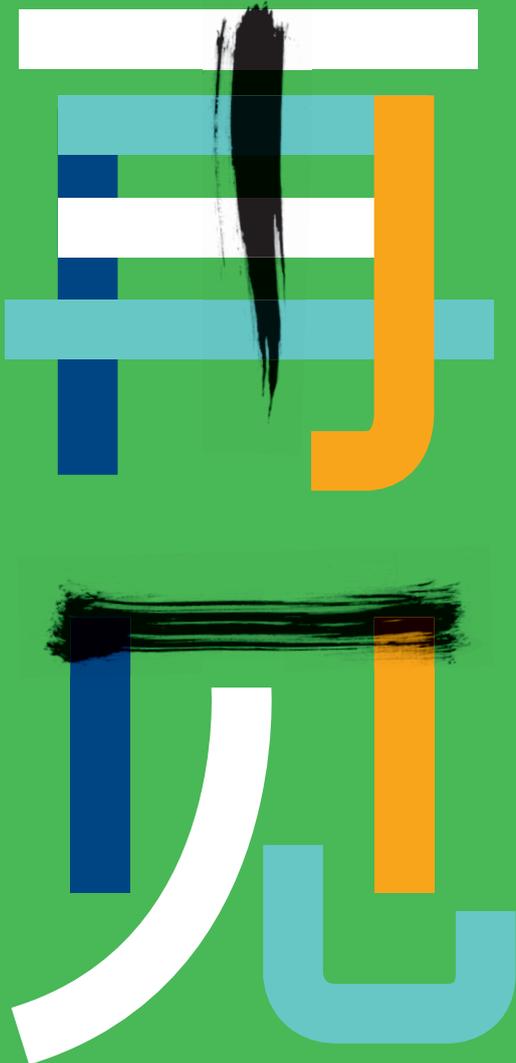
VisitBritain

VisitBritain is the national tourism body for the UK. They also have representation in China and work closely with VisitScotland to promote Scotland in China. VisitBritain run a series of travel trade events in market, including the International Luxury Travel Market (June) and Destination Britain and China (November). They also run the GREAT China Welcome Charter, a free accreditation programme that offers support and promotion for tourism businesses taking steps to become China-Ready. For more information visit: www.visitbritain.org/great-china-welcome

Connect with us online or find us on Twitter or LinkedIn



www.sdi.co.uk
[@ScotDevInt](https://twitter.com/ScotDevInt)



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Zaijian
See you soon