

Current Situation, Problems and Strategy Analysis of Tourism Service Trade in Zhejiang

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ABSTRACT

Compared with general service trade, tourism service trade has higher requirements for timeliness and accuracy of information. According to the statistics of the Tourism Bureau of Zhejiang Province, the tourism economy of Zhejiang province has kept steady development in the last ten years. In 2017, the number of inbound tourists in Zhejiang reached 641 million, up 9.63% year-on-year, and foreign exchange income from Zhejiang's tourism continued to increase. In the context of current international environment, the government and enterprises should actively seek the way out for the development of Zhejiang's tourism service trade. This paper analyzes the current situation of tourism service trade in Zhejiang, expounds the problems and carries out a strategy analysis to promote the development of tourism service trade in Zhejiang.

Key words: tourism service trade in Zhejiang province, current situation, problem, strategy.

1. INTRODUCTION

In recent years, China's tourism service trade has maintained steady development and maintained a favorable balance. With the development of global economy and the increase of people's income, more and more people choose to travel abroad, and many regions and countries can seize this opportunity to improve the local tourism service trade industry [1]. Tourism service trade refers to the activities of tourism service industry to provide tourism services and remuneration to domestic and foreign tourists. Compared with the general service trade, tourism service trade has high demand for timeliness and accuracy of information [2]. Zhejiang province is located in the southeast coastal area of China. The tourism resources are very rich, which has laid a good foundation for the development of tourism service trade. The tourism service trade in Zhejiang has developed very rapidly with diversified tourism service trades. The Zhejiang provincial government has made great efforts to develop the third industry. By promoting the sustainable development of ecological environmental protection, the tourism trade products are constantly upgrading, the foreign exchange income of Zhejiang province is growing continuously, the number of inbound tourism is rising, and tourism service trade is developing very well [3]. Between 2007 and 2017, the foreign

exchange income of Zhejiang's tourism service trade has increased from 2.708 billion US dollars to 8.276 billion US dollars, up nearly 3 times. However, with the rapid development of tourism service trade, there are still some problems in terms of unbalanced development of tourism service trade between Zhejiang and surrounding provinces such as Shanghai, Fujian, Zhejiang and Fujian. For example, foreign capital in the tourism service trade related industries lack sufficient funds [4]. With the development of the Hangzhou G20 Summit and preparation of the Asian Games, Hangzhou began to enter the international arena, and thus brought new challenges and opportunities to the development of Zhejiang's tourism service trade [5]. Because of the uniqueness of the tourism industry, the government should increase the support and guidance for the tourism service trade in Zhejiang, promote the transformation and upgrading of the linkage industry of tourism service trade, strengthen the training of professional high-quality talents engaged in tourism service trade, and continue to promote the brand concept of the poetry and painting of Zhejiang [6]. Therefore, in the context of current international environment, both the government and enterprises should actively seek the way out for the development of Zhejiang's tourism service trade, and solve existing problems so as to promote the development of tourism service trade in Zhejiang.

2. CURRENT SITUATION OF TOURSIM SERVICE TRADE IN ZHEJIANG

Overview of tourism service trade in Zhejiang

Zhejiang province is located in the southeast coastal area of China. The tourism resources are very rich, including historical and cultural resources and natural landscape resources. In addition, the infrastructure of Zhejiang is very perfect. In these years, the tourism service trade in Zhejiang has developed rapidly [7]. During the period of 2008-2016, the number of inbound tourists in Zhejiang continued to grow rapidly. The number of inbound tourists in 2017 reached 12.117 million, up 9.63% as compared with 2016, and the number of

foreign tourists continued to rise. According to Zhejiang Tourism Development 13th Five-Year Plan, the number of tourists in Zhejiang will be expected to reach 715 million by 2020, and Zhejiang tourism service trade will continue to develop.

According to Table 1, from 2008 to 2017, the total tourism income of Zhejiang has seen a rapid growth, rising from 225 billion yuan to 932.2 billion yuan, up 314%. With the growth of GDP in Zhejiang Province, Zhejiang's total tourism income is also increasing. In 2017, Zhejiang's total tourism revenue in Zhejiang's GDP accounted for 18%, increasing 1% year-on-year. Thus, the contribution of Zhejiang's tourism service trade to GDP has steadily rising year by year, and the tourism service trade in Zhejiang is playing an important role.

Table 1 Zhejiang's total tourism revenue and GDP growth in recent years (100 million yuan)

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Total tourism revenue	2250	2644	3312	4080	4801	5536	6361	7139	8093	9322
GDP	21462	22990	27722	32318	34665	37756	40173	42886	47251	51768

Source: Zhejiang Provincial Bureau of Statistics (<http://tjj.zj.gov.cn/>)

Trade volume in Zhejiang's tourism service

According to the statistics of the Tourism Bureau of Zhejiang Province, in 2017, the number of inbound tourists in Zhejiang has increased year by year, and the tourism economy in Zhejiang has maintained a sustained growth, and the annual target is literally completed. The

number of tourists to the province reached 12.117 million, an increase of 8.3% year-on-year, and the foreign exchange income of international tourism was 8.276 billion US dollars, an increase of 10.54% year-on-year. Meanwhile, the number of inbound tourism in China was about 139 million, an increase of 0.8% year-on-year.

Table 2 Foreign exchange income of tourism in Zhejiang (2008-2017)

Year	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
International Tourism Foreign Exchange Income (millions of dollars)	3024	3223	3930	4541	5151	5392	5753	6788	7431	8276
Year-on-year growth (%)	11	6	21	15	13	4	6	17	9	11

Source: Zhejiang Provincial Bureau of Statistics (<http://tjj.zj.gov.cn/>)

As shown in Table 2, from 2008 to 2017, foreign exchange earnings of Zhejiang's tourism service trade increased steadily. The foreign exchange income of tourism in 2008 was 3.24 billion dollars, and the foreign exchange earnings of inbound tourism reached 8.276 billion dollars in 2017, increasing nearly 3 times. According to the data, the year-on-year growth rates of foreign exchange earnings in 2008 and 2009 were 11% and 6% respectively. After a certain economic recovery, the growth rate of international tourism foreign exchange income increased sharply to 21% in 2010, and the year-on-year growth rate of foreign exchange income after inbound tourism began to decline gradually, and the rate

of growth in 2013 reached a minimum peak. From 2013 to 2015, the growth rates of foreign exchange earnings were less than 5%, and the economic development was in a stable state. Since 2015, it has maintained an overall growth rate of 10%, and tourism foreign exchange income is on the rise. In a word, it can be concluded that the total amount of foreign exchange income of tourism in Zhejiang province is very considerable, and the trade volume of tourism service continues to grow and has the room and potential to continue to improve.

Export market structure of tourism service trade in Zhejiang

In the past years, the number of inbound tourists in Zhejiang has been increasing, and the structure of tourism service trade export market has changed [8]. In 2017, the total number of inbound tourists in Zhejiang was 12.117 million, with an increase of 8.3% over last year. The number of foreign tourists is 8.15 million. There are 373.7 million tourists from Asia, accounting for 20.3% of the total number, an increase of 4.7%; 2.78 million tourists from Europe, accounting for 14.8%; 1.158 million from America, an increase of 1.6%; 307 thousand tourists from Oceania, an increase of 15.7%; 282 thousand tourists from Africa, an increase of 9.6%.

From the export market structure of Zhejiang's tourism service trade, the total number of tourists from the three countries (Korea, Japan and the United States) accounts for 1/4 of the total number. Among them, the proportion of Korean tourists is the largest, accounting for about two times the number of tourists from the United States and Japan. The number of Korean tourists declined significantly in 2017, while the number of Japanese tourists increased sharply, up 42.2%. The total number of tourists coming to Zhejiang is mainly Asian tourists, with a total number of 3.737 million, nearly three times the total number of tourists in Europe and America, mainly due to the similar culture among Asian countries [9]. The year-on-year growth rate of US tourists reached 14.6%, which is basically the same as 2016. Malaysia, Britain, Singapore and other countries have a large number of inbound tourists, and in recent years, the growth rate of the number of tourists to Zhejiang Province is more than 10%. In addition to Russia, Holland and Sweden, the number of tourists to Zhejiang Province is small, but the growth rate of tourists in 2017 is very considerable.

In 2016, there is a very obvious difference between various cities in Zhejiang regarding the proportion of the foreign exchange income. Among them, Hangzhou is 42.4%, Ningbo 12.3%, Wenzhou 10.8%, and Jinhua 10%. The foreign exchange income of these four cities accounts for 75.5% of the total inbound tourism foreign exchange income in Zhejiang. It can be concluded that the utilization rates of tourism resources in these cities are relatively high, and there is no good economic benefit of tourism service trade [10].

2.4 The utilization of foreign investment in Zhejiang's tourism service trade in Zhejiang

MNCs, financial institutions and individuals are big

players in international investment, and they play an important role in international investment [11]. For the tourism service trade, the main investment object of MNCs is tourism related enterprises, such as the Zhejiang International Tourism Group [12]. The foreign direct investment introduced in Zhejiang province is mostly invested in the third industry. The total investment in the third industry accounted for 64% of the total, and the proportion of the actual utilization of foreign capital was 58.5%. The amount of foreign capital used in the accommodation and catering industry was 0.13%, and the actual utilization of foreign capital was only 0.133%. Therefore, the utilization of foreign capital in the tourism service trade of Zhejiang province is very low, so Zhejiang should improve the policy to attract foreign investment, accelerate the improvement of foreign investment environment, expand the utilization efficiency of foreign investment, and introduce foreign capital into the tourism industry [13].

3. MAJOR PROBLEMS OF TOURISM SERVICE TRADE IN ZHEJIANG

Regional development imbalance of tourism service trade in Zhejiang

Zhejiang province's tourism service trade volume, the number of inbound tourists and other important indicators are becoming better. However, Hangzhou, Ningbo and Wenzhou are the main contributors to the indicators, among which, Hangzhou is the provincial capital city, its indicators are ranked first [14]. According to the statistics of Zhejiang Tourism Bureau, Hangzhou international tourism (foreign exchange) reached 3.1494367 billion US dollars in 2016, accounting for 42.38% of the total. The annual international tourism revenue of Ningbo accounts for only 29.1% of Hangzhou. It can be concluded that the foreign exchange income gap between Zhejiang provinces is very wide. This fully illustrates that the international tourism service trade in Hangzhou is in the top place. In addition to the city of Hangzhou, the number of inbound tourists and the foreign exchange income from other cities are very low. Therefore, this also leads to the problem of the overall low benefits of the tourism service trade of Zhejiang province [15].

Lack of high quality trade practitioners in tourism services

Tourism service trade requires higher quality of tourism practitioners, thus high level services can better meet the needs of foreign tourists. High quality tourism service can guarantee the development of tourism service trade in Zhejiang. Although Zhejiang has a large population and abundant human resources, the quality of the practitioners in tourism service trade is not high. In Zhejiang, the language level of the tourist practitioners is low, and there are only a limited number of tour guides who can use foreign language skillfully. Therefore, it is very important to strengthen the language level of the practitioners [16]. Secondly, at present, the number of high level international tourist service trade practitioners in Zhejiang province is small, especially with the experience of learning and practice abroad, and the complex talents who are familiar with international standards, have professional overseas training and experience, and are able to engage in international trade and characteristic tourism are more scarce. Lack of talents will greatly impede the sustainable development of tourism service trade.

Low proportion of Zhejiang's tourism service trade

Zhejiang's international tourism market share has been increasing in recent years, but there is still a gap between Zhejiang and other cities in China [17]. According to the data of China's statistical yearbook, the international tourism foreign exchange income of Zhejiang province in 2016 is 31.275 million US dollars, which accounts for only 48% of Shanghai and 16.8% of Guangdong province. Thus, it can be seen that the tourism service trade benefit of Zhejiang is not matched with its economic status. However, from 30.24 million US dollars in 2008 to 82.76 million US dollars in 2017, the international tourism service trade in Zhejiang is still growing steadily, while the market share of tourism in Zhejiang is also increasing. But compared with Shanghai and Guangdong, there is a still a big gap in terms of the foreign exchange income.

Insufficient international customer market

Through the analysis of the current situation, the main source of Zhejiang inbound tourism comes from South Korea, Japan and the United States, among which, South Korean tourists have the largest proportion, accounting for about two times the number of tourists from the United States and Japan. The data has shown that the growth

rate of Korean tourists has declined, while the number of tourists in Japan has increased significantly. As a result of the proximity of geographical location and convenient traffic, tourists to Zhejiang are mainly from the Asian region. In 2017, the total number reached 3.737 million, nearly three times the total number of European and American tourists. European and American markets have seen a small increase in recent years, for example, the growth rates of tourists from Britain and the United States have remained at around 15%. In addition, the data have shown that tourist markets in Africa, the Middle East, South America and Oceania have great potential. The total number of inbound tourists from Malaysia, Britain, Singapore and other countries is large, and the number of people coming to Zhejiang in recent years has increased by more than 10%. Generally speaking, the market of Zhejiang's source country can continue to expand. At present, the development of tourist market in many countries is far from enough.

Insufficient introduction and low utilization rate of foreign capital

In 2016, the third industry in Zhejiang using the contract foreign capital accounted for 64% of the total amount of foreign capital used in the contract. The proportion of actual utilization of foreign capital is 58.5%. The amount of foreign capital used in the contract for catering and accommodation related to tourism service trade is only 0.13%, and the actual use of foreign capital amount is only 0.133%. Therefore, generally speaking, the foreign investment in the tourism service trade of Zhejiang province is very low, and the foreign investment can bring many advantages to the tourism service trade industry. Besides capital support, Zhejiang can also introduce advanced international management experience, and advanced tourist service facilities. If Zhejiang wants to better develop tourism service trade, it is necessary to allocate foreign capital more rationally, invest more foreign capital into tourism service trade, and also improve the utilization efficiency of foreign capital [18].

4. STRATEGY ANALYSIS OF PROMOTING THE TOURISM SERVICE TRADE IN ZHEJIANG

Coordinating regional development and narrowing regional gap

Through the continuous efforts in these years, the uneven development of tourism service trade in Zhejiang has been improved. The proportion of Hangzhou's total number of visitors has decreased from 42% in 2006 to 32% in 2016, but this situation still needs to be improved. In order to reduce the differences between regions, all regions in Zhejiang province should promote the development of tourism service trade according to local tourism resources and cultural characteristics. Firstly, Zhejiang should improve the overall tourism service trade benefits. The areas with better tourism services such as Hangzhou, Ningbo and Wenzhou should strengthen the radiation effects on the other regions, actively promote the tourism construction in various regions, and strive to achieve the common development of all regions. The government needs to support the development of less developed areas, strengthening local infrastructure construction, improving relevant supporting facilities, and developing new tourist attractions. Local tourism enterprises can draw on the experience of many excellent tourist cities both at home and abroad, make good use of local resources, innovate constantly, launch new local tourism products, keep pace with the times, and use a variety of mass communication methods to promote the tourism so as to attract the tourists both at home and abroad. In addition, the provinces and regions should also cooperate with each other so as to avoid similarities in many scenic spots and develop together. Zhejiang should also make use of the surrounding big cities like Shanghai to enhance the popularity of the city through cooperation between regions and promote the development of tourism service trade.

Strengthening the training of personnel in tourism service trade

The quality of tourism service trade practitioners determines the quality of tourism service. Zhejiang province has rich human resources and a large number of tourism service trade practitioners. In 2017, more than 100 colleges and universities had tourism majors in Zhejiang province. However, at present, the quality level of the whole practitioners is not high and the international talents are still in short. Therefore, the higher level of talent training plan is urgently needed. Firstly, the government can promote the cooperation between provincial tourism institutions and local tourism enterprises, and therefore college students can grasp the

skills needed for the future jobs. Meanwhile, Zhejiang should promote the international development of professional tourism service talents education, strengthen the exchange and cooperation between tourism colleges and foreign universities and colleges, and cultivate students' international vision. For example, Tourism College of Zhejiang China has exchange and cooperation projects with many countries, and sends outstanding students to the United States, the United Arab Emirates, Australia and other countries every year. These students know the advanced management methods of various countries, international rules, and are familiar with the tourism environment in Zhejiang. In addition, the government should exercise its own functions, maintain a fair and orderly tourism market, and improve the welfare of the practitioners related to the tourism service trade so as to attract more outstanding talents. Travel professional training institutions should also develop related business projects, such as working with tourism companies or tourism associations, organizing regular training for in-service tourism practitioners, promoting their language skills to serve overseas tourists, and strengthening the training of related skills. The government also needs to strengthen the supervision of personnel behavior in tourism enterprises and improve the overall quality of practitioners.

Making full use of superior resources to create characteristic tourism in Zhejiang

Zhejiang province is well-known for "Seven mountains, one water and two fields" and has very rich natural resources and cultural resources [19]. East Zhejiang is adjacent to the East China Sea, with Zhoushan and Shengsi archipelago. The central region has many historical and cultural origins, such as Xitang, Wuzhen, and Nanxun. The town of Water Township with antique fragrance can create a tourist resort in the south of Yangtze River with elegant natural environment and full of historical and humanistic flavor. Central and southern Zhejiang have good ecological environment. There are many forests and natural reserves, which can satisfy the desire of modern people to return to the mountains and forests. In addition, Zhejiang Jinhua Yiwu small commodity market, Haining Leather City, and Wenzhou trade city have unique market tourism resources. While Hangzhou has developed very well in tourism service trade, other areas of Zhejiang should make use of local

tourism resources and create local tourist attractions. While developing characteristic tourism, Zhejiang can attract foreign tourists by developing distinctive and creative high-tech tourism products to promote the tourism service trade in the province. In addition, the rich and colorful nature, humanities landscape and good ecological environment are the basis for the development of tourism service trade in Zhejiang. Therefore, in the construction and development of scenic spots, all regions should also seek protective development measures, adhere to the policy of sustainable development, and protect the tourism resources and the local ecological environment. The development of Zhejiang's tourism service trade will be more stable and lasting.

Optimizing marketing strategy and strengthening overseas marketing

Currently, Zhejiang does not have a high international reputation, and there is still a big gap between Zhejiang and big cities like Beijing and Shanghai. In order to change this situation, the top priority is to improve the overseas popularity of Zhejiang tourism. Firstly, to learn the various needs of different nationality tourists, and formulate the overseas marketing plans for the demand, such as improving the redevelopment of tourist attractions, pricing strategies, and investment in overseas advertising so as to enhance the popularity of tourism and ultimately promote the development of tourism service trade in Zhejiang [20]. Secondly, to adjust the current tourism marketing strategy of innovation based on media marketing methods in other countries. Thirdly, to combine some network platforms and popular TV programs. In recent years, many scenic spots have been popular through some hot travel variety shows, and reality shows. Zhejiang can also make good use of the celebrity fans to attract the attention of domestic and foreign tourists. In addition, network marketing is becoming more and more important recently, spreading fairly fast and efficiently. By YouTube and other social networks, we can propagate Zhejiang's tourism resources in a short time through netizens' praise and forward. At the same time, the updated websites can help tourists to book flight tickets, train tickets, and hotel rooms ahead of time, and provide customized online travel routes and diversified tourist attractions, and meet the needs of tourists to different tourist attractions as well. In a word, all regions in Zhejiang should strengthen the brand

publicity of local tourist attractions, create a distinct brand image, optimize the marketing strategy, and enhance the international popularity.

Expanding the financing channels of capital introduction and improving the mechanism of capital introduction

Foreign investment can bring financial support to the tourism service trade industry, together with advanced international management experience, international management concept, and advanced tourism service facilities. At present, regarding the use of foreign capital, a large number of foreign capital are introduced in Zhejiang province every year, and the proportion of investment into the third industry is more than half. However, the proportion of investment to tourism service is very low. From the Zhejiang foreign direct investment data, it is concluded that the current accommodation and catering industry in Zhejiang has received the contracted foreign capital of 58.76 million US dollars, accounting for only 0.3% of foreign capital contracted in the service industry, and the actual utilization of foreign capital is 51.67 million US dollars, accounting for only 0.5% of the actual utilization of foreign capital in the service industry. Nowadays, the foreign capitals are mainly invested in star hotels and restaurants, and only a small percentage go to travel agencies, tourism traffic and tourism products, partly due to relevant policies in China. However, the contribution of foreign capital should not be overlooked. The direction of attracting foreign investment can be gradually liberalized. Firstly, Zhejiang can attract foreign capital to build its tourist traffic. In recent years, the number of tourist arrivals in Zhejiang has continued to rise, and the number of international tourists is increasing. These all require the further improvement of Zhejiang's tourism traffic, and many areas still need developed transportation facilities. Attracting foreign investment can be a very good choice, and more capital can be invested in the construction of subway, railway and airport. Secondly, Zhejiang can attract foreign capitals to some tourist attractions which are still not fully developed.

To sum up, Zhejiang needs to make better use of foreign capital and allocate it rationally, attract foreign investment to the hotel and catering, and further liberalize the restrictions on foreign investment into the market, provide relevant policy convenience for foreign

enterprises, and thus promote the development of tourism service trade in Zhejiang.

5. CONCLUSION

Through the above research, it can be concluded that there are still many problems in the tourism service trade in Zhejiang Province. Firstly, the development of tourism service trade in Zhejiang province is still unbalanced, mainly relying on Hangzhou, Ningbo and Wenzhou. The overall benefit of tourism service trade in Zhejiang is not obvious. Secondly, although Zhejiang province has rich human resources, it is lack of high quality tourism service practitioners who know multi-languages and have business knowledge. Thirdly, the proportion of Zhejiang's tourism service trade is not high. Compared with Shanghai, Guangzhou and other cities, Zhejiang's tourism service trade volume and overall market share are relatively low. It still needs to be further developed. Fourthly, the international tourist market in Zhejiang province has many limitations. The current Asian countries are the main tourist destination countries in Zhejiang Province, while the number of tourists from Africa and the Middle East is relatively small and the growth rate is relatively high. Finally, the introduction of foreign capital in Zhejiang is insufficient and the utilization rate is not high. Most of the foreign investment introduced in Zhejiang province is invested in the service industry, and the proportion of investment in tourism service is very low, which will restrict the development of Zhejiang tourism service trade and the promotion of overall competitiveness. Based on these problems, relevant strategic analysis is put forward. Firstly, Zhejiang needs to narrow regional differences and improve the overall efficiency of tourism service trade. Large cities such as Hangzhou and Wenzhou should give full play to the radiation effect and actively lead less developed areas. And the landing area should make use of the local tourism resources, strengthen the innovation of tourism products and create special tourism. Each scenic area should optimize the marketing strategy, create its own characteristic brand and increase the marketing intensity of overseas market, make special overseas marketing plans and improve the tourist attractions according to the potential tourist market. The quality of service, optimization of pricing strategies, and promotion of the overseas popularity of the scenic area will eventually push the development of Zhejiang's tourism service trade.

Because of the current utilization and distribution of foreign capital, the investment amount of the Zhejiang provincial government is very small, and the policy can give foreign investment some incentives and attract them to enter the market with reasonable allocation of funds to increase investment in related industries.

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