

# UNLOCKING CHINA'S INBOUND TOURISM COMPETITIVENESS

释放中国入境旅游竞争力





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*A Green Paper by Pacific Asia Travel Association (PATA) and World Tourism Cities Federation (WTCF)*

亚太旅游协会 (PATA) 和世界旅游城市联合会 (WTCF) 的绿皮书

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China has a significant opportunity to enhance both the quality and scale of its inbound tourism. This Green Paper, developed by PATA in collaboration with WTCF, highlights the potential for growth in China's inbound tourism sector. It provides a thorough analysis of the sector's strengths, challenges, opportunities, and threats. By assessing the current landscape and identifying key areas for improvement, WTCF and PATA aim to unlock China's vast potential as a leading destination in the Pacific Asia Region.

In 2023, tourism supported 78 million jobs and contributed 7.3% to China's GDP, with projections indicating growth to 107 million jobs and a 13.5% GDP contribution over the next decade. Beyond its economic impact, tourism plays a vital social role in China, enhancing public well-being and driving socio-cultural development.

中国在提升入境旅游质量和规模方面蕴含着巨大机遇。本《绿皮书》由亚太旅游协会与世界旅游城市联合会合作编写，强调了中国入境旅游业的发展潜力。绿皮书对该行业的优势、挑战、机遇和威胁进行了全面和深入的分析。世界旅游城市联合会和亚太旅游协会旨在通过评估当前形势和确定需要改进的关键领域，释放中国作为亚太地区主要旅游目的地的巨大潜力。

2023年，旅游业提供了7800万个就业岗位，对中国GDP的贡献率为7.3%，预计未来十年将增长至1.07亿个就业岗位，对GDP的贡献率为13.5%。除了经济影响，旅游业在中国发挥着重要的社会作用，提高了公众福祉，推动了社会文化发展。

China's tourism industry is rapidly evolving, fueled by several key factors with the potential to significantly boost the nation's economic and cultural growth. The expanding middle class has greatly increased demand for diverse travel experiences, both within China and abroad. Enhanced infrastructure, including high-speed railways and expanded flight routes, has improved accessibility and reduced travel times. There is a growing interest in cultural and heritage tourism, with travelers seeking authentic experiences that explore China's rich cultural history. Additionally, the integration of technology has transformed the travel experience, making it more convenient and personalized, especially for Chinese-speaking tourists.

As a global cultural and historical powerhouse, China has emerged as a significant player in international tourism, with vast growth potential and the capability to assume global leadership in the sector. Spanning 9.6 million square kilometers and with a history of over 5,000 years, China offers a diverse and compelling array of attractions for international visitors.

Tourism has become a key aspect of modern Chinese life, and this trend is expected to continue its steady growth, supported by favorable economic conditions and positive consumer sentiment. However, to fully benefit from its tourism economy, authorities must carefully evaluate current performance and seek ways to improve the profitability and competitiveness of the sector, particularly inbound tourism movements. Notably, the flourishing tourism sector has the potential to drive the prosperity of other industries, exemplifying the concept that when one industry flourishes, all industries flourish.

This Green Paper is divided into four sections including State of Play of the Chinese Tourism Economy, International Competitiveness of China Tourism, High-level Recommendations and Concluding Remarks.

在几个关键因素的推动下，中国旅游业正在迅速发展，这些因素有可能显著地促进中国的经济和文化发展。不断扩大的中产阶级极大地增加了对国内外多样化旅游体验的需求。包括高速铁路和扩建航线在内的基础设施的改善，提高了交通便利性，缩短了旅行时间。人们对文化和遗产旅游的兴趣与日俱增，旅游者寻求探索中国丰富文化历史的真实体验。此外，科技的融合也改变了旅游体验，使其更加便捷和个性化，尤其是对讲中文的游客而言。

作为全球文化和历史强国，中国已成为国际旅游业的重要参与者，具有巨大的增长潜力，并有能力在该领域发挥全球引领作用。中国幅员960万平方公里，拥有5000多年的历史，为国际游客提供了丰富多样、引人入胜的旅游景点。

旅游业已成为现代中国人生活的一个重要方面，在有利的经济条件和积极的消费情绪的支持下，这一趋势有望继续保持稳定增长。然而，要从旅游经济中充分获益，有关部门必须认真评估当前的表现，并设法提高该行业的盈利能力和竞争力，尤其是入境旅游活动。值得注意的是，旅游业的蓬勃发展有带动其他行业繁荣的潜力，从而体现出“一业兴则百业兴”的理念。

本绿皮书分为四个部分，包括中国旅游经济现状、中国旅游的国际竞争力、高层次建议和结束语。

## China's Tourism Economy State of Play

### 中国旅游经济现状

China has a robust tourism economy consisting of domestic, inbound and outbound activities. The following sections provides a state of play summary of each.

中国的旅游经济蓬勃发展，包括国内旅游、入境旅游和出境旅游。下文将对各项活动的现状进行总结。

#### Domestic Tourism 国内旅游业



The robust revival of the domestic tourism market in 2023 has fueled ongoing confidence and momentum in the industry. According to the Ministry of Culture and Tourism, nearly 4.891 billion domestic trips were made in 2023, marking a substantial 93.3% increase from the previous year. However, this figure still falls short of the 5.5 billion trips recorded in 2019, when domestic tourism expenditure was estimated at \$862 billion.

2023 年国内旅游市场的强劲复苏为旅游业带来了持续的信心和动力。根据中国文化和旅游部的数据，2023 年国内旅游人数达到 48.91 亿人次，比上年大幅增长 93.3%。然而，这一数字仍未达到 2019 年的 55 亿人次，而 2019 年的国内旅游支出为 8,620 亿美元。

The expansion of high-speed railways, new air routes, and enhanced tourist facilities has significantly contributed to the growth of domestic tourism. Across the country, destinations have capitalized on the power of short videos and social media to boost their appeal and reputation. Successful city marketing campaigns in 2023, such as Zibo Barbecue, Village BA/Super, Tianjin's Diving Grandpas, and Harbin Ice and Snow World, underscore the crucial role of city marketing in promoting destinations and sparking travel interest.

高速铁路的扩建、新航线的开通以及旅游设施的加强，对国内旅游业的增长做出了重要贡献。全国各地的旅游目的地都在利用短视频和社交媒体来提升自身吸引力和美誉度。2023 年成功举办的城市营销活动，如淄博烧烤、超级村 BA、天津潜水爷爷和哈尔滨冰雪大世界，突显了城市营销在推广目的地和激发旅游兴趣方面起到的关键作用。

Prior to the pandemic, China was the global leader in outbound tourism expenditure, underscoring its importance as a source market. Given the global economic slowdown, it is wise to improve the balance of trade within China's tourism economy by enhancing inbound tourism and managing monetary outflows. Encouraging Chinese tourists to explore domestic destinations rather than traveling abroad can support this goal in the short term. During the pandemic, there was a notable rise in domestic travel as many Chinese opted to discover their own country.

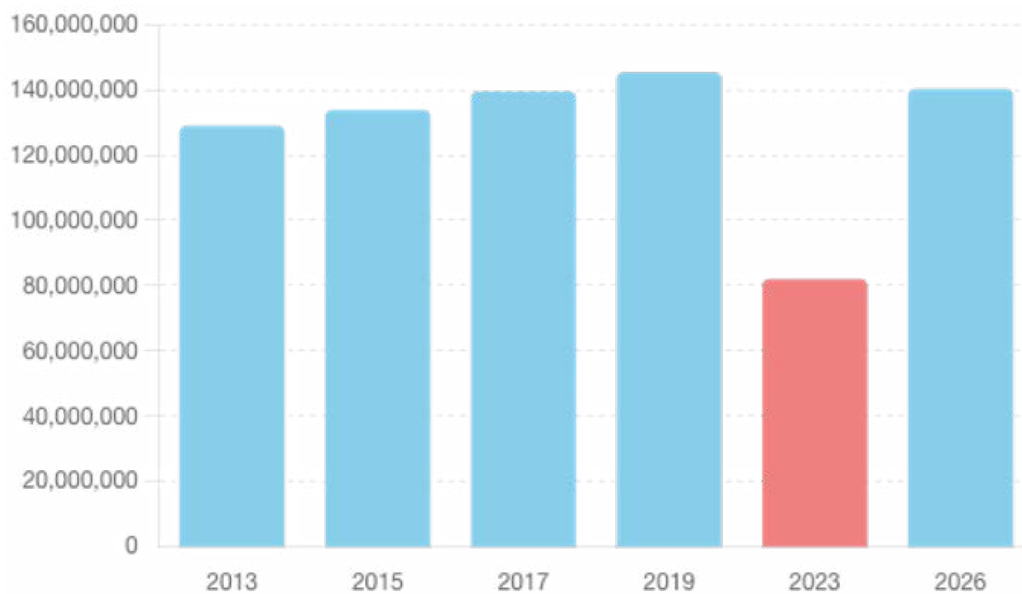
疫情前，中国的出境旅游支出在全球居首位，凸显了其作为客源市场的重要性。鉴于全球经济放缓，通过加强入境旅游和管理资金外流来改善中国旅游经济内部的贸易平衡是明智之举。在短期内鼓励中国游客探索国内旅游目的地，而不是出国旅游，可以帮助实现这一目标。在疫情期间，由于许多中国人选择在国内探索，国内旅行显著增加。

**Inbound Tourism 入境旅游**

In 2023, China recorded 82 million inbound tourism arrivals, including visitors from Hong Kong SAR, Macao, and Chinese Taipei, which represented 67% of the 145 million visitors in 2019 when inbound tourism spend was estimated at US\$136 billion. The Pacific Asia Travel Association (PATA) forecasts that China will return to this 2019 visitor level by 2026.<sup>1</sup>

2023 年，包括港澳台同胞游客在内的中国入境旅游人数达到 8200 万人次，达到了 2019 年 1.45 亿入境人次的 67%，而 2019 年的入境旅游消费估计为 1360 亿美元。亚太旅游协会 (PATA) 预测，到 2026 年，中国游客数量将恢复到 2019 年的水平。

**Figure 1: International Visitor Arrivals to PRC**  
**图表1：中国国际游客数量统计**



<sup>1</sup> PATA Asia Pacific Visitor Forecasts 2024-2026: Mid-Year Report  
 2024年-2026年亚太地区游客预测报告——年中报告

These dimensions and characteristics of the current international inbound market should be carefully considered as China embarks on an effort to boost inbound tourism growth. In addition to implementing favorable visa-friendly policies, recovering international flight capacity, and enhancing products and services to expand market reach, Chinese authorities need to better understand the current drivers of tourism in the country.

Current trends for inbound tourism show the rising popularity of snow tourism is significantly boosting expectations for inbound tourism in Northeast China. The Chinese government is actively leveraging Harbin's fame to expand snow tourism across the region, promoting collaboration to enhance the unique qualities of major tourist destinations and create strong regional tourism brands.

Meanwhile, East and South China remain the primary destinations for inbound tourism, benefiting from major international cities like Shanghai, Shenzhen, and Guangzhou. These areas enjoy frequent international exchanges and economic activities, supported by abundant resources and comprehensive facilities in tourism hubs such as Suzhou, Hangzhou, and Guilin. Additionally, residents in these regions have the highest propensity for international travel.

When comparing the tourism appeal of various regions across the country, North, Central, Southwest, and Northwest China boast historic and cultural cities as well as world-renowned attractions. However, East and South China hold a more significant advantage in tourism appeal due to their earlier development of the tourism industry, higher levels of internationalization, and a more diverse range of tourism resources.

在中国努力促进入境旅游增长的过程中，应深入研究当前国际入境市场的各个维度和特征。除了实施有利的签证政策、恢复国际航班运力、加强产品和服务以扩大市场覆盖面之外，中国政府需要更好地了解当前中国旅游业的驱动因素。

此外，从目前的入境旅游趋势来看，冰雪旅游的不断升温大幅提升中国东北地区入境旅游的预期。中国政府正积极利用哈尔滨的知名度，在整个地区推广冰雪旅游，促进合作，提升主要旅游目的地的独特品质，打造强大的区域旅游品牌。

同时，受益于上海、深圳和广州等主要国际城市，华东和华南地区仍是入境旅游的首选主要目的地。在苏州、杭州和桂林等旅游枢纽丰富的资源和完善的设施支持下，这些地区的国际交流和经济活动频繁。此外，这些地区的居民也具有最高的国际旅行倾向。

在对比全国各大区域的旅游吸引力时，不难发现，尽管华北、华中、西南及西北地区在历史文化与自然景观上具有不可小觑的吸引力，但华东与华南地区凭借其更早的旅游业发展基础、更高的国际化水平以及更为丰富的旅游资源组合，在旅游吸引力上占据了更为显著的优势地位。

## Outbound Tourism 出境旅游

In 2019, China produced 134 million outbound trips, with Chinese travelers spending a substantial \$258 billion on tourism-related products and services, accounting for one-fifth of global tourism expenditure. U.S. travelers ranked second, spending \$135 billion.<sup>2</sup>

By 2023, China's outbound tourism industry was on the path to recovery, with over 87 million outbound tourists, reaching about 50% of 2019 levels. Some Chinese travelers are opting to temporarily forgo overseas trips, choosing instead to explore domestic destinations. Factors such as current visa policies and changes in international flights have boosted outbound tourism, particularly to Asia. However, challenges like instability in the international political situation continue to pose deterrents.

The "Singapore-Malaysia-Thailand" route remains a popular choice among Chinese tourists, while emerging destinations along the "Belt and Road" in Central and West Asia are gaining traction.

Europe is seeing increased popularity due to a rise in flights, now reaching 90% of 2019 levels. However, entry barriers for Chinese citizens remain relatively high, with visa fees on the rise. The outbound tourism supply chain has yet to fully recover, keeping travel costs elevated. Outbound tourism to North America remains slow, with Chinese citizens primarily traveling for study and business purposes.

From a purely balance of trade perspective, China's tourism imports are nearly double its exports. Therefore, a concerted effort to increase inbound tourism activities is clearly of national fiscal interest.

2019年，中国出境旅游人数达1.34亿人次，中国游客在旅游相关产品和服务上的支出高达2580亿美元，占全球旅游支出的五分之一。而美国游客位居第二，消费额为1350亿美元。

到2023年，中国出境游行业正逐渐复苏，出境游客数量超过8700万人次，达到2019年水平的约50%，部分中国游客选择暂时放弃海外旅行，转而探索国内目的地。签证政策的调整、国际航班班次的增加等因素推动了中国出境旅游市场的增长，特别是前往亚洲各国的出境游增长显著。然而，国际政治局势不稳定等挑战仍是阻碍。

新加坡-马来西亚-泰国“路线仍然是中国游客的热门选择，而中亚和西亚“一带一路”沿线的新兴目的地也正日益受到青睐。

由于航班增加，欧洲的旅游需求不断上升，目前已达到2019年水平的90%。然而，中国公民赴欧入境仍面临相对较高的门槛和逐渐上涨的签证费用。出境游供应链尚未完全恢复，导致旅游成本居高不下。至于北美地区的出境游仍然进展缓慢，中国公民主要以学习和商务为目的。

单纯从贸易平衡的角度来看，中国的旅游业进口额几乎是其出口额的两倍。因此，共同努力增加入境旅游活动显然符合国家财政利益。

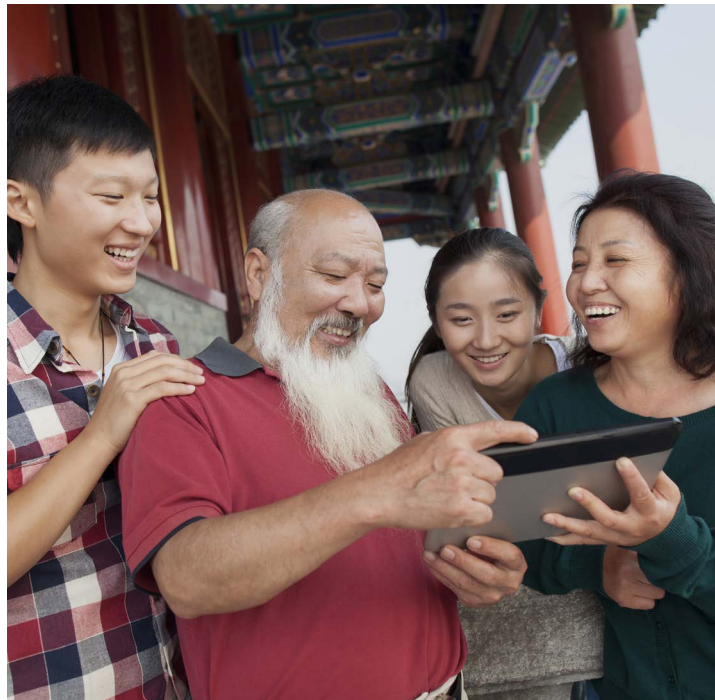
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<sup>2</sup> Analysis by Pacific Asia Travel Association  
PATA旅游业分析

## Tourism+ State of Play 旅游业+发展状况

China holds a significant comparative advantage in tourism-related green and digital technologies. These innovations can be exported across the Pacific Asia Travel Association (PATA) region to support the Belt and Road Initiative, enhancing regional tourism infrastructure and promoting sustainable development.

中国在与旅游业相关的绿色和数字技术方面具有明显的比较优势。这些创新可在整个亚太旅游协会（PATA）所覆盖的地区出口，以支持“一带一路”倡议，并加强地区旅游基础设施建设，从而促进可持续发展。



To advance the tourism supply system, it's essential to shift the foundational ideas towards a "tourism +" approach. This strategy emphasizes tourism's role in empowering the high-quality development of related industries, thereby amplifying the spillover effects of tourism consumption.

要推进旅游供给体系建设，必须转变基本思路，朝着“旅游+”方向转型。这一战略强调旅游业在促进相关产业高质量发展中的作用，从而扩大旅游消费的溢出效应。

Starting with the digital economy, the goal is to build a modern tourism ecosystem centered around digital platforms. This ecosystem will adapt to different tourism consumption patterns, creating tailored tourism spaces, products, and industries. The result will be a comprehensive tourism industry chain that works in tandem with the tourism facilitation system, driving high-quality tourism development in China and across Asia.

以数字经济为基础，构建以数字平台为核心的现代旅游生态系统。该生态系统将适应多样化的旅游消费模式，创造个性化定制的旅游空间、产品和产业。最终形成与旅游便利化体系相配套的完整旅游产业链，推动中国乃至整个亚洲旅游业的高质量发展。



The integration of tourism with health and wellness sectors is already booming, particularly in Traditional Chinese Medicine (TCM). Additionally, guiding tourism enterprises to embrace technological innovations, cultural creation, and other new productive forces will further the high-quality development of the industry. Continuous innovation in business models and products will foster smart tourism, enhancing convenience and enriching the tourist experience. This approach advocates for tourism that benefits society, providing warm and inclusive services for special groups, such as the elderly.

Despite national tourism policies prioritizing digitalization, Southeast Asia's SMART tourism ecosystem development faces challenges, including insufficient funding, limited digital skills, urban-rural digital divides, and evolving legal frameworks. China is well-positioned to offer assistance in these areas to its ASEAN neighbors.

To accelerate the deep integration of tourism with related industries—such as culture, transportation, sports, and agriculture—China must launch world-class tourist attractions, routes, destinations, cities, resorts, and complexes. The aim is to cultivate globally influential tourism enterprises, including tourism groups, hotel chains, service providers, cultural creators, on-line travel agencies (OTAs), and operators of transportation services. This integration will lead to significant breakthroughs in tourism facilitation, furthering the construction of a comprehensive tourism supply system driven by the “Tourism +” strategy.

旅游业与康养产业的融合已经蓬勃发展，尤其是中医药产业。此外，引导旅游企业拥抱科技创新、文化创意等新生产力，将进一步推动旅游业高质量发展。商业模式和产品的不断创新将促进智慧旅游的发展，提高旅游的便利性，丰富游客的旅行体验。这种方式倡导旅游造福社会，为老年人等特殊群体提供温馨而包容的服务。

尽管国家旅游政策将数字化列为优先事项，但东南亚的智慧旅游生态系统发展仍面临诸多挑战，包括资金不足、数字技能有限、城乡数字鸿沟以及不断演变的法律框架。中国在这些领域具备条件向东盟邻国提供帮助。

加快推进旅游业与文化、交通、体育、农业等相关产业的深度融合，中国必须打造世界级的旅游景区、线路、目的地、城市、度假区和综合体。目标是培育具有全球影响力的旅游企业，包括旅游集团、连锁酒店、服务提供商、文化创意企业、在线旅游平台（OTA）、旅游专列和交通服务运营商等。这种整合将使旅游便利化体系取得重大突破，进一步推动以“旅游+”战略为驱动的全域旅游供给体系建设。

## Achieving World Class Tourism 实现世界级的旅游业

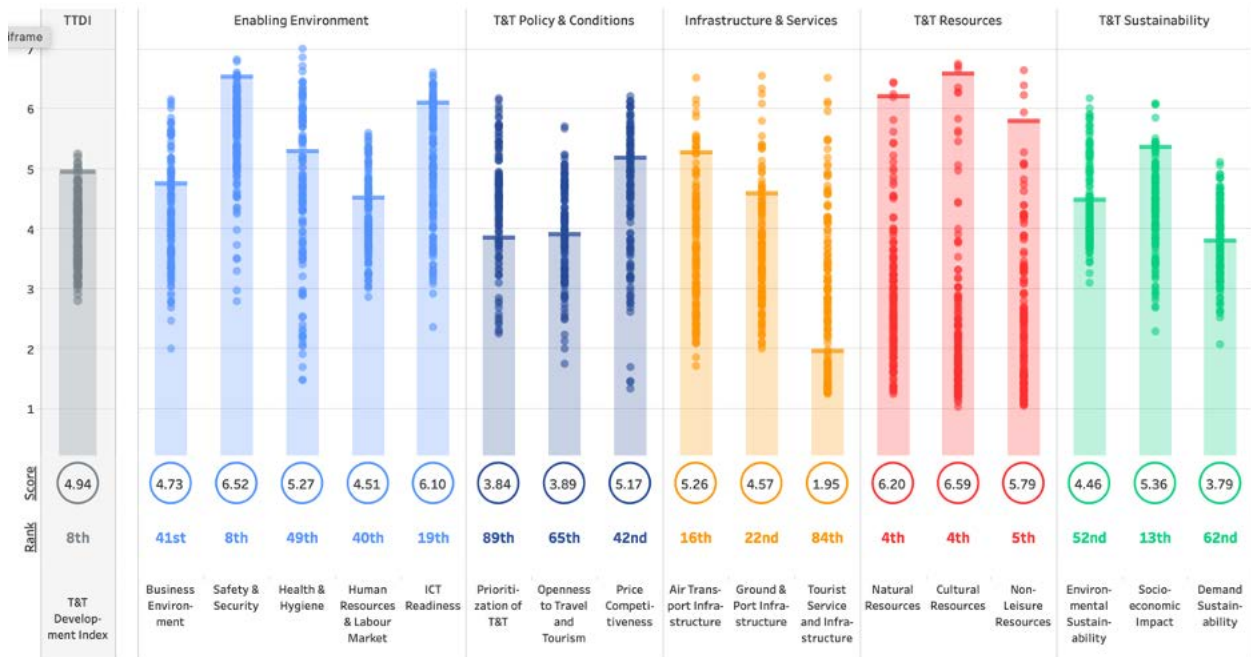
### China's International Competitiveness 中国的国际竞争力

Understanding and addressing weaknesses, as well as mitigating challenges, are crucial for effective tourism development. China's rich cultural heritage, diverse landscapes, and historical landmarks offer a strong foundation for inbound tourism. The World Economic Forum's biennial Travel and Tourism Development Index (TTDI) serves as an excellent benchmark for international tourism standards, measuring factors and policies that drive sustainable development. This index provides valuable insights into opportunities and challenges in the context of global and regional market trends. China has consistently improved its rankings, scoring 15th position out of 140 countries in 2019, 12th out of 117 countries in 2021 and 8th out of 119 countries in 2024. Figure 2 provides an overview of China's impressive 8th rank performance in 2024.

了解和解决薄弱环节以及应对挑战对于有效发展旅游业至关重要。中国丰富的文化遗产、多样的景观和历史地标为入境旅游奠定了坚实的基础。世界经济论坛每两年发布一次的“旅行与旅游发展指数”（TTDI）是国际旅游标准中备受推崇的评估工具，可衡量推动可持续发展和提升目的地竞争力的因素和政策。该指数提供在全球和区域市场趋势背景下洞察机遇和挑战的宝贵见解。中国在世界经济论坛“旅行和旅游指数”中的排名持续攀升，2019年在140个国家中排名第15位，2021年在117个国家中排名第12位，2024年在119个国家中排名第8位。图2提供了2024年中国排名第8位的概况，且令人印象深刻。

**Figure 2: 2024 Travel and Tourism Development Index Results for PRC**

**图表2：2024年中国旅行和旅游发展指数成果**



For comparative purposes, the 2024 rankings for Japan (#3) and Singapore (#13) are presented in Table 1 to showcase regional best practices. These examples can serve as valuable references for China as it develops its own vision and strategy for future inbound tourism growth.

为了比较研究的目的，本报告纳入了日本（第3位）和新加坡（第13位）如表一所示的2024年排名，以展示该地区最佳实践。这些案例可为中国制定自身未来入境旅游发展愿景和战略提供有价值的参考。

**Table 1: 2021 Travel and Tourism Development Index Ranking<sup>3</sup>**  
2021年旅行和旅游发展指数排名

Index/Sub-Indices	索引/分索引	China PRC 中国	Japan 日本	Singapore 新加坡
<b>Enabling Environment</b>	<b>有利环境</b>	<b>32</b>	<b>18</b>	<b>5</b>
· Business Environment	· 商业环境	41	19	1
· Safety and Security	· 安全和安保	8	39	1
· Health and Hygiene	· 健康与卫生	49	12	53
· Human Resources/Labour Market	· 人力资源/劳动力市场	40	22	7
· ICT Readiness	· 信息和通信技术就绪状态	19	25	5
<b>T&amp;T Policy and Enabling Conditions</b>	<b>T&amp;T 政策和有利条件</b>	<b>65</b>	<b>54</b>	<b>25</b>
· Prioritization of Travel and Tourism	· 确定旅行和旅游的优先次序	89	40	10
· Openness to Travel and Tourism	· 旅行和旅游开放度	65	60	2
· Price Competitiveness	· 价格竞争力	42	79	114
<b>Infrastructure</b>	<b>基础设施</b>	<b>38</b>	<b>14</b>	<b>1</b>
· Air Transport Infrastructure	· 航空运输基础设施	16	14	4
· Ground and Port Infrastructure	· 地面和港口基础设施	22	4	1
· Tourist Service Infrastructure	· 旅游服务基础设施	84	56	21
<b>T&amp;T Demand Drivers</b>	<b>T&amp;T 需求驱动因素</b>	<b>1</b>	<b>3</b>	<b>54</b>
· Natural Resources	· 自然资源	4	11	109
· Cultural Resources	· 文化资源	4	2	66
· Non-Leisure Resources	· 非休闲资源	5	4	25
<b>T&amp;T Sustainability</b>	<b>T&amp;T 可持续性</b>	<b>65</b>	<b>51</b>	<b>48</b>
· Environmental Sustainability	· 环境可持续性	18	28	55
· Socioeconomic Resilience and Conditions	· 社会经济复原力和条件	13	44	56
· T&T Demand Sustainability	· T&T 需求的可持续性	62	106	39
<b>Overall Ranking (out of 117)</b>	<b>综合排名 (总分 117 分)</b>	<b>8</b>	<b>3</b>	<b>13</b>

<sup>3</sup>World Economic Forum (WEF). Travel & Tourism Competitiveness Index 2019 Edition and Travel and Tourism Development Index 2021 Edition.

世界经济论坛 (WEF) · 2019年“旅行与旅游竞争力指数”(TCI)和2021年旅行和旅游发展指数排名。

China's high ranking is largely driven by its exceptional performance in the T&T Demand Drivers sub-index, which identifies key motivators for travel, including natural, cultural, and non-leisure resources:

- **Natural Resources:** Measures natural capital, including landscapes, parks, and biodiversity, considering attractions such as UNESCO natural World Heritage Sites, fauna richness, and protected areas. Digital demand for nature-related activities is also considered, reflecting how well these assets are marketed.
- **Cultural Resources:** Evaluates cultural assets like archaeological sites and entertainment venues, considering protection, development, and promotion efforts. This includes the number of UNESCO cultural World Heritage Sites, large stadiums, and UNESCO Creative Cities, alongside digital demand for cultural sites and entertainment.
- **Non-Leisure Resources:** Focuses on factors driving business and other non-leisure travel, significant for T&T revenue. This includes the presence of multinational corporations, globally integrated cities, quality universities, and online searches related to business, academic, and medical travel.

These strengths underscore China's strong positioning in the global tourism market and provide a roadmap for further enhancing its international competitiveness in inbound tourism. The below SWOT analysis provides a summary of China Tourism's challenges and opportunities.

中国名列前茅，主要得益于其在“旅行和旅游发展指数排名”中的卓越表现，该指数确定了旅游的主要动因，包括自然、文化和非休闲资源：

- **自然资源：**衡量自然资本，包括景观、公园和生物多样性，并考虑到联合国教科文组织世界自然遗产地、丰富的动物种群和保护区等景点。与自然相关活动的数字需求也在考虑之列，反映了这些资产的市场化程度。
- **文化资源：**评估考古遗址和娱乐场所等文化资产的保护、开发和推广力度，包括联合国教科文组织世界文化遗产数量、大型体育场馆以及联合国教科文组织创意城市数量，同时还需满足对文化遗址和娱乐场所的数字需求。
- **非休闲资源：**重点关注驱动商务和其他非休闲旅游的因素，对“旅行和旅游”收入至关重要。这些因素包括跨国公司、全球一体化城市、高质量大学以及与商业、学术和医疗旅行相关的在线搜索。

这些优势凸显了中国在全球旅游市场中的强势地位，并为进一步提升中国入境旅游的国际竞争力提供了发展方向。以下 SWOT 分析概述了中国旅游业面临的挑战和机遇。

**Table 2: China Tourism SWOT Analysis**

表2: 中国旅游业SWOT分析

**China Tourism SWOT**  
中国旅游业SWOT分析

**Strength 优势**

- **Rich Cultural Wealth:** China's millennia-old history, represented by iconic landmarks like the Great Wall and the Forbidden City, is a significant strength, attracting international tourists seeking cultural immersion.
- **丰厚文化财富：** 以长城和故宫等标志性建筑为代表的中国千年历史是一大优势，吸引着寻求文化体验的国际游客。
- **Diverse Landscapes:** China's diverse geography, ranging from vibrant metropolises to serene natural wonders, offers a spectrum of experiences for tourists with varied preferences.
- **多样的地貌景观：** 中国地貌多样，既有充满活力的大都市，也有宁静的自然奇观，为不同喜好的游客提供了多样的体验。
- **Remarkable China's modernization:** Ongoing and established infrastructure in transportation (e.g., high speed railway), accommodations (e.g., smart hotels), mega-event legacy (e.g., Olympics), and tourist facilities (e.g., VR Immersive experience) contribute to an improved and eye-opening fresh experience.
- **令人瞩目的中国式现代化：** 中国式现代化在交通(如高速铁路)、住宿(如智能酒店)、大型活动遗产(如奥运会)和旅游设施(如VR沉浸式体验)方面的体现，有助于提升游客体验，让人大开眼界。

**Weakness 弱点**

- **Large Cultural Disparities:** China faces challenges in presenting a clear and compelling image, limiting its appeal and acceptance to a broader international audience.
- **较大的文化差异：** 东西方文化的差异和区别，使得中国在展示清晰、引人注目的形象方面面临挑战，部分限制了其对更广泛的国际受众的吸引力和接受程度。
- **Language Barrier:** The prevalence of Mandarin and limited English proficiency in some regions poses a communication challenge for non-Chinese-speaking tourists.
- **语言壁垒：** 中国一些地区普通话普及，而英语水平有限，这给不讲中文的游客带来了交流上的挑战。
- **Inconvenience of Cultural and Tourism Consumption:** The reservation rules and consumption environment for foreign tourists' travel in China need to be improved, including but not limited to foreign passport booking, foreign currency payment, foreign language service, etc.
- **文旅消费的便利性尚待加强：** 外国游客来华参观的景点预约规则、消费环境还有待改善，包括但不限于外国护照预约、外币支付、外语服务等。

**Table 2: China Tourism SWOT Analysis (Continued)**

表2: 中国旅游业SWOT分析

### China Tourism SWOT 中国旅游业SWOT分析

#### Strength (Continued) 优势

- **Strong Government Support:** Supportive government policies, including visa facilitation and tourism promotion initiatives, bolster the attractiveness of China as a destination.
- **政府强有力支持：**政府通过支持旅游发展的政策，如签证便利化和旅游业的推广等，增强中国作为旅游目的地的吸引力。
- **Rural tourism revival:** Along with the deepening of rural revitalization and the construction of beautiful villages, rural tourism become more appealing to international tourists as new destinations to explore.
- **乡村旅游的复兴：**随着乡村振兴和美丽乡村建设的深入，乡村旅游作为新的旅游目的地对国际游客的吸引力越来越大。

#### Opportunity 机遇

- **Cultural Exchanges:** Leveraging China's cultural heritage for immersive exchange programs can attract tourists seeking authentic experiences.

#### Weakness (Continued) 弱点

- **Imbalanced Regional Marketing:** Disparities in destination marketing may result in some regions receiving inadequate exposure, affecting their visibility to potential international visitors.
- **不均衡的地区营销：**中国各目的地营销方面的不均衡差异可能会导致一些地区的曝光率不足，影响其对潜在国际游客的知名度。
- **Fragmented Destination Branding:** Due to the geographical and cultural diversity, there are too many tourism brands across China with limited integration to the national brand.
- **目的地品牌分散：**由于地貌与文化的复杂多样，中国各地的旅游品牌较多，与国家旅游品牌的融合度有限。
- **Shortage of Qualified Human Resources:** The current supply of hospitality and tourism personnel across the tourism value chain are not entirely suited to inbound tourism.
- **人力资源短缺：**目前整个旅游价值链中的酒店和旅游业人员的供应并不完全符合入境旅游业的基本需求。

#### Threat 威胁

- **Political Instability Challenge:** Global political tensions can deter tourists due to concerns about safety and security.

**Table 2: China Tourism SWOT Analysis (Continued)**

表2: 中国旅游业SWOT分析

**China Tourism SWOT**  
中国旅游业SWOT分析

**Opportunity (Continued) 机遇**

- **发挥文化交流魅力：**可利用中国的文化遗产开展身临其境的交流项目，吸引寻求真实体验的游客。
- **Benefits of Visa-free transit policy:** China's 72 or 144-hour transit visa-free policy has greatly simplified the procedures for foreigners coming to China and facilitated inbound tourism.
- **过境免签政策的利好：**中国实行的72 或144小时过境免签政策极大简化了外国人来华手续，为入境旅游提供了便利。
- **International Social Media WOM Enhancement:** Strengthening China's online presence through social media word-of-mouth (WOM) and travel platforms can significantly influence international travelers' decisions.
- **国际社交媒体口碑传播：**通过社交媒体口碑和旅游平台加强中国的网络形象，可以极大地影响国际游客的决策。

**Threat (Continued) 威胁**

- **全球政治局势挑战：**全球紧张的政治局势会让游客对安全和保障产生担忧，从而望而却步。
- **Pandemic Concerns:** Ongoing health crises may lead to travel restrictions, impacting inbound tourism globally.
- **对流行病的担忧：**持续的健康危机可能导致旅行限制，影响全球入境旅游。
- **Regional Competition:** Similar cultural destinations in neighboring countries may pose a competitive threat. The multiple competing tourism brands create complete confusion in the market and knowledge about and interest in China wanes.
- **区域内竞争的威胁：**区域内邻国类似的文化旅游目的地可能构成竞争威胁。多个相互竞争的旅游品牌在市场上易造成内耗局面，从而削弱对中国的了解，降低访问兴趣。

All of these factors affect China's potential to grow international inbound tourism and must be considered in any growth strategy.

上述各因素均会对中国发展国际入境旅游潜力造成影响，因此在任何发展战略中都须加以考虑。

## High Level Recommendations 高层次建议

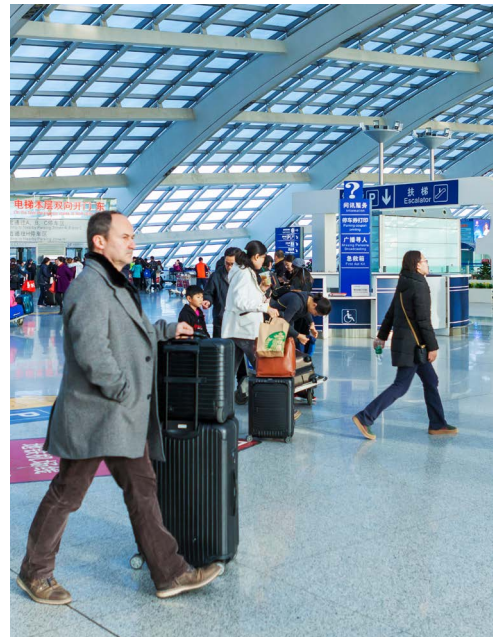
### Growing Inbound Tourism to China 发展中国入境旅游业

Based on the above situational analysis, this Green Paper provides six high level recommendations to improve the value and impact of international inbound tourism in China.

基于上述形势分析，本《绿皮书》提出了六项建议，旨在提升中国国际入境旅游的价值和影响力。

The following are some recommended strategic considerations that national, provincial and local tourism authorities might consider in their orchestrating the sustainable growth of inbound tourism to China.

以下是一些战略考虑建议，国家、省和地方旅游部门在协调中国入境旅游的可持续增长时可能会加以考虑。



#### Recommendation #1: Build on Comparative Advantage and Strength

##### 建议一：基于资源禀赋，发挥比较优势

China is often cited as a global leader in natural, cultural, and non-leisure resources based on several international benchmarks. For instance, China leads in the number of elements inscribed on UNESCO's Representative List of the Intangible Cultural Heritage of Humanity. This includes traditional practices, festivals, and crafts that are recognized globally for their cultural importance. Given China's high standing in world-class cultural and natural heritage sites, the country should focus on developing its core comparative advantages in cultural tourism, such as cultural events, educational tours, and wellness/medical tourism offer significant potential for further development and refinement.

China should particularly focus on developing environmentally friendly tourism by leveraging its abundant natural resources to promote eco-tourism and sustainable tourism. In the planning and development of tourism, careful consideration

根据多项国际标准，中国的自然资源、文化资源和非休闲资源均居全球首位。以非物质文化遗产为例，中国在联合国教科文组织《人类非物质文化遗产代表作名录》中收录的项目数量就位居世界前列。这些项目包括传统习俗、节庆和工艺品，是全球范围内得到认可的、重要的文化表达。鉴于中国在世界级文化和自然遗产方面的卓越地位，中国应重点发展其在文化旅游方面的核心比较优势，例如文化活动、教育旅游以及健康/医疗旅游，这些领域具有进一步开发和提升的巨大潜力。

特别是，中国应注重打造环境友好型旅游，充分发挥自身丰富的自然资源优势，推广生态旅游和可持续旅游，并且在旅游规划和开发过程中，充分考虑生态保护和资源合理利用，合理



should be given to ecological protection and the rational use of resources. Environmental assessments should be conducted thoroughly to prevent over-development or over-tourism from consuming the eco-system.

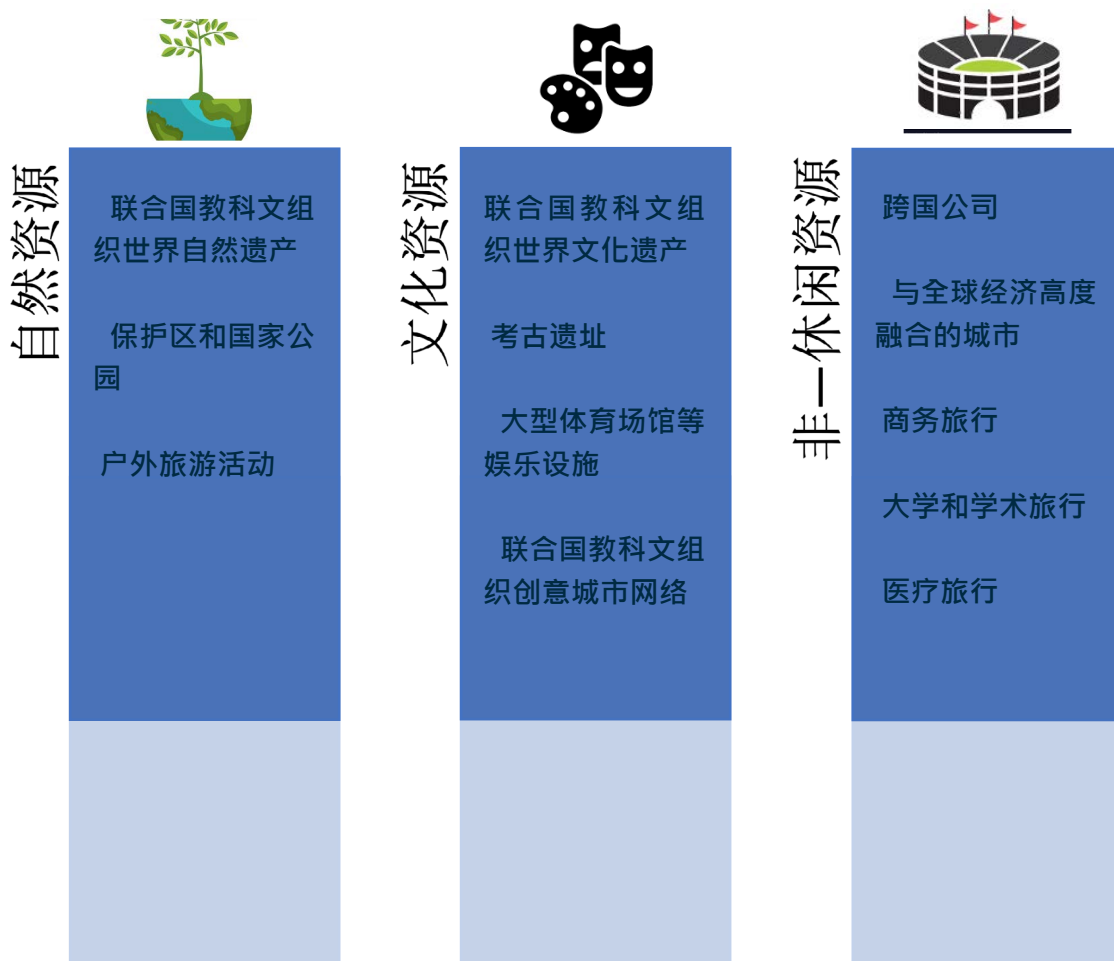
开展环境评估，避免过度开发和过度旅游对生态环境的消耗。

China's tourism sector has the opportunity to enhance these assets and strengthen the country's tourism brand, ensuring that marketing and advertising campaigns prominently feature these themes. On the supply side, tourism circuits, routes, and itineraries should be crafted around these core themes and niches. Additionally, the development of the Meetings, Incentive, Convention, and Exhibition (MICE) industry should be a key component of inbound tourism, with a particular focus on urban-based tourism across China's cities.

中国的旅游部门有机会提升这些优势，强化国家的旅游品牌，并确保营销和广告活动突出这些主题。在供应方面，应围绕这些核心主题和商机精心打造旅游线路、路线和行程。此外，会议、奖励旅游、会议和展览(MICE)行业的发展应成为入境旅游的关键组成部分，尤其应关注中国各城市的都市型旅游。

Figure 3: China's Comparative Advantages in Tourism

图表3：中国旅游业的比较优势



## Recommendation #2: Advancing Towards Culture Tourism 3.0

### 建议二：推动文化旅游进入3.0时代

Since ancient times, the Chinese people have embraced the idea of “reading 10,000 books and traveling 10,000 miles.” Tourism plays a vital role in cultural inheritance and the creation of civilization, making it essential to enhance cultural self-confidence and soft power as part of building a strong tourism nation. As China has achieved widespread material prosperity, the demand for spiritual and cultural enrichment has become increasingly prominent, with people eager to explore both the spirit of scholarship and the broader world.

However, China's current model of cultural tourism is lagging behind the rapidly growing market demands, where innovative initiatives are critically needed. This current model is characterized by one-way communication, limited engagement, and a heavy reliance on traditional tour operators/guides. This has resulted in the persistence of well-worn itineraries centered around destinations like Beijing, Xi'an, Shanghai, and occasionally Guilin, Chengdu, and the Yangtze River—an approach that hampers the effective dispersion of inbound tourism across the country.

To revitalize its image, China must be rebranded as a dynamic, contemporary destination with engaging and vibrant people. The shift should be towards a more interactive and collaborative cultural experience, where visitors actively participate in hands-on and immersive activities. The focus should be on providing authentic cultural experiences that allow tourists to deeply connect with Chinese culture. Furthermore, local community involvement is essential to ensure that they benefit both economically and socially from tourism activities.

Culture Tourism 3.0 emphasizes dynamic, co-created, experiential forms of tourism. To advance, China needs to transition from its traditional, passive cultural tourism (1.0) to a more dynamic

自古以来，中华民族就有“读万卷书，行万里路”的思想。旅游在文化传承和文明创造中发挥着重要作用，因此，建设旅游强国必须增强文化自信和软实力。随着中国物质生活的普遍富裕，人们对丰富精神文化生活的的需求日益凸显，渴望深入探索学术精神和更广阔的世界。

然而，中国当前的文化旅游模式已不能满足当前的市场发展需求，亟需创新。其特点是单向交流，参与度有限，并且严重依赖传统旅游运营商/导游。这导致了以北京、西安和上海为中心，以及偶尔也以桂林、成都和长江为中心的传统旅游路线持续存在这种做法，阻碍了入境旅游在全国范围内有效分布。

要重振中国的国际入境旅游目的地形象，就必须将其重新打造为一个充满活力的现代旅游目的地，让人们参与其中，感受活力。文化体验应朝着更具互动性和协作性的方向转变，让游客积极参与实践和身临其境的活动。重点应放在提供原汁原味的文化体验上，让游客与中国文化深度融合。此外，社区参与对于确保当地社区从旅游活动中获得经济和社会效益至关重要。

文化旅游 3.0 强调动态、共创、体验式的旅游形式。要实现这一目标，中国需要从传统的、被动的文化旅游（1.0）模式向更具活力的、共同创造

and co-created model (3.0), where the Chinese people themselves become central tourism assets throughout the entire value chain. This transformation will position China as a leader in innovative cultural tourism, offering visitors a truly immersive and participatory experience that resonates with the evolving demands of global travelers.

的 (3.0) 模式转型，在此过程中，中国人民本身将成为整个价值链的核心旅游资产。这种转型将使中国成为创新文化旅游的领导者，为游客提供真正沉浸式的参与式体验，与全球游客不断变化的需求产生共鸣。

**Table 4: Understanding the Dynamics of Culture Tourism 1.0, 2.0 and 3.0**

表4：了解文化旅游 1.0、2.0 和 3.0 的发展动态

<b>Culture Tourism Phase</b> 文化和旅游业的阶段	<b>1.0: Traditional Cultural Tourism</b> 传统的文化和旅游业	<b>2.0: Interactive Cultural Tourism</b> 互动的文化和旅游业	<b>3.0: Collaborative and Sustainable Cultural Tourism</b> 合作与可持续的 文化旅游业
<b>Features</b> 特征	<p>This phase represents the traditional form of cultural tourism, where visitors primarily seek exposure to the heritage, history, and cultural artifacts of a destination.</p> <p>这一阶段代表了文化旅游的传统形式，游客主要寻求接触目的地的遗产、历史和文物。</p> <p>Tourists are passive observers, and the focus is on historical landmarks, museums, and traditional cultural performances.</p> <p>游客是被动的观察者，重点是历史地标、博物馆和传统文化表演。</p> <p>Interaction with the local community may be limited, and the experience is often curated by tour operators.</p> <p>与当地社区的互动可能有限，而且这种体验通常是由旅游经营者策划的。</p>	<p>This phase reflects a shift toward more interactive and participatory experiences for tourists.</p> <p>这一阶段反映了向游客提供更具互动性和参与性体验的转变。</p> <p>Visitors seek hands-on and immersive cultural activities, such as workshops, cooking classes, and cultural events.</p> <p>游客寻求亲身体验和身临其境的文化活动，如工作坊、烹饪班和文化活动。</p> <p>There's a growing interest in understanding the local way of life, customs, and traditions beyond traditional tourist attractions.</p> <p>除了传统的旅游景点之外，人们越来越有兴趣了解当地的生活方式、习俗和传统。</p>	<p>This phase emphasizes collaborative and sustainable practices in cultural tourism.</p> <p>这一阶段强调文化旅游的协作和可持续实践。</p> <p>There's a focus on co-creation, where tourists actively contribute to and participate in the preservation and promotion of local culture.</p> <p>重点是共同创造，让游客积极促进和参与当地文化的保护和推广。</p> <p>Sustainability, responsible tourism, and community engagement are integral to the experience.</p> <p>可持续发展、尽责的旅游和社区参与是这种体验不可或缺的一部分。</p>

**Table 4: Understanding the Dynamics of Culture Tourism 1.0, 2.0 and 3.0 (Continued)**

表4：了解文化旅游 1.0、2.0 和 3.0 的发展动态

Culture Tourism Phase 文化和旅游业的阶段	1.0: Traditional Cultural Tourism 传统的文化和旅游业	2.0: Interactive Cultural Tourism 互动的文化和旅游业	3.0: Collaborative and Sustainable Cultural Tourism 合作与可持续的 文化旅游业
<b>Characteristics:</b> 特点	<p><b>One-way communication:</b> Tourists consume cultural experiences presented by the destination without active participation.</p> <p><b>单向传播:</b> 旅游者在不主动参与的情况下消费目的地呈现的文化体验。</p> <p><b>Limited engagement:</b> Interaction with the local community and immersion in authentic cultural activities are minimal.</p> <p><b>有限的参与:</b> 与当地社区的互动和真正的文化活动的沉浸体验很少。</p> <p><b>Tour operator-led:</b> It is often organized through guided tours and packaged experiences.</p> <p><b>旅行经营者主导:</b> 通常通过导游和打包体验来组织。</p>	<p><b>Two-way communication:</b> Tourists actively engage with the local culture, participating in activities and connecting with the community.</p> <p><b>双向交流:</b> 游客积极融入当地文化，参与各种活动，与社区建立联系。</p> <p><b>Immersive experiences:</b> The focus is on providing tourists with authentic, hands-on experiences to enhance cultural understanding.</p> <p><b>沉浸式体验:</b> 重点是为游客提供真实的亲身体验，以增进文化理解。</p> <p><b>Rise of independent travel:</b> Tourists may explore cultural elements independently, seeking personalized and unique experiences.</p> <p><b>自由行兴起:</b> 游客可以自主探索文化元素，寻求个性化、独特的体验。</p>	<p><b>Co-creation:</b> Tourists become contributors to the cultural experience, actively participating in cultural preservation and enhancement.</p> <p><b>共同创造:</b> 游客成为文化体验的贡献者，积极参与文化保护和提升。</p> <p><b>Sustainability:</b> Emphasis on responsible tourism practices to ensure the long-term well-being of cultural and natural resources.</p> <p><b>可持续性:</b> 强调尽责的旅游实践，以确保文化和自然资源的长期福祉。</p> <p><b>Community involvement:</b> Local communities play a significant role, benefiting economically and socially from tourism activities.</p> <p><b>社区参与:</b> 当地社区发挥着重要作用，从旅游活动中获得经济和社会效益。</p>

### Recommendation #3: Brand China as a Vibrant Destination

#### 建议三：将中国打造成充满活力的旅游目的地

To be competitive in international inbound tourism, China must establish a market-oriented and professional national tourism promotion agency, integrating tourism into key multilateral platforms such as the Belt and Road Initiative, the Shanghai Cooperation Organization, the BRICS mechanism, and China-ASEAN. Strengthening both international and domestic tourism promotion is crucial to enhancing China's global appeal and influence.

It is recommended to create a National Tourism Promotion Bureau dedicated to the comprehensive planning and implementation of China's overseas tourism promotion efforts. This includes developing suitable tourism products and improving public tourism services for visitors from visa-free, visa-on-arrival, and transit visa countries. Additionally, the construction of domestic tourism infrastructure should be prioritized, alongside initiatives that promote the concept of "Beautiful China." Financial support should be allocated for the green transformation and global development of the tourism industry.

Furthermore, to elevate the standard of inbound tourism facilitation, it is essential to launch a national inbound tourism revitalization plan. This plan should focus on the development of world-class tourism cities and the enhancement of inbound tourism services. Continuous improvements in areas such as visa processing, mobile payments, international data connectivity, and the internationalization of public interpretation systems will be key. These efforts will not only promote Chinese culture globally but also reduce China's service trade deficit and position inbound tourism as a stabilizing force in the international environment, contributing to the advancement of China's soft power.

中国要想在国际入境旅游中具有竞争力，应建立市场化、专业化的国家旅游推广机构，将旅游业纳入“一带一路”倡议、上海合作组织、金砖国家机制、中国-东盟等重要多边平台。加强国际和国内旅游推广对于提升中国的全球吸引力和影响力至关重要。

建议设立国家旅游促进局，专门负责中国海外旅游推广工作的全面规划和实施。这包括为免签、落地签和过境签证国家的游客开发合适的旅游产品，改善公共旅游服务。此外，应优先建设国内旅游基础设施，并积极推动“美丽中国”的理念。应为旅游业的绿色转型和全球发展提供资金支持。

此外，要提升入境旅游便利化水平，启动国家入境旅游振兴计划尤为重要。该计划应以建设世界级旅游城市和提升入境旅游服务为重点。在签证流程、移动支付、国际通信数据连接、公共翻译系统国际化等方面不断改进将是关键所在。这些努力不仅有助于在全球范围内弘扬中华文化，还能减少中国的服务贸易逆差，并将入境旅游定位为国际环境中的稳定力量，为提升中国的软实力做出贡献。

Figure 4: China International Destination Branding

图表4：中国国际目的地品牌建设



To correspond with the need to shift China's approach to culture tourism and to nurture the growth of inbound tourism, it is recommended that China be branded as a vibrant destination with lively and engaging people. A nation's tourism brand is a powerful tool for economic development, cultural exchange, and global recognition, making it a crucial aspect of a country's overall strategy for growth and international engagement.

While the new *Nihao! China* is certainly eye catching, it is important to identify how the logo and slogan can be used in a creative way to portray China as vibrant, hip and contemporary, particularly in regards to youth culture. There is great potential to gain popularity worldwide, introducing global audiences to Chinese storytelling, fashion, and lifestyle.

Appreciating that destination brands are complicated and sensitive topics, it may be prudent to conduct a third-party assessment of how to build the *Nihao! China* brand to produce the desired results. An overall assessment of tourism brands is also prudent; as it is a critical success factor in developing inbound tourism that there consistent brand and messaging across national, provincial and municipal tourism promotion campaigns aimed at international visitors. A critical success factor will be the full engagement and coordination of the network of 46 Culture and 23 Tourism offices located overseas. It may be that these 69 representation offices are underutilized and lack brand coordination. The key is to align the branding with the aspirations and needs of each target audience, creating a narrative that resonates and inspires action.

为适应中国文化旅游方式的转变和入境旅游增长的需要，建议将中国打造成为一个生机勃勃的旅游目的地，拥有充满活力和独具魅力的人民。一个国家的旅游品牌是促进经济发展、文化交流和全球认可的有力工具，也是国家发展和国际参与总体战略的重要方面。

而新的“你好！中国”固然是引人注目的，但重要的是要明确如何创造性地使用标识和口号，尤其是在青年文化中，将中国描绘成一个充满活力、时尚和现代的国家。它有巨大的潜力在全球范围内流行，向全球受众介绍中国的故事、时尚和生活方式。

考虑到目的地品牌是一个复杂而敏感的话题，对于如何打造“你好！中国”品牌产生预期效果具有重要意义。对旅游品牌进行全面评估也是审慎之举，因为在国家、省和市三级针对国际游客的旅游推广活动中，品牌和信息的一致性是关键成功因素。文化部门(46)和旅游部门(23)海外办事处网络的充分参与和协调将成为关键成功因素之一。这69个代表处可能没有得到充分利用，缺乏品牌协调。关键在于使品牌符合每个目标受众的愿望和需求，创造一种能够引起共鸣并激发行动的叙事方式。

## Recommendation #4: Establish Targeted Marketing Strategies

### 建议四：制定有针对性的市场营销战略

Efforts should focus on the demand side of tourism by adjusting institutional constraints that currently limit the release of tourism consumption potential. The diversity of China's tourism offerings and the growth of tourism consumption depend on the variety and type of tourism demand. However, various systems and policies from relevant departments have restricted the emergence of new tourism demands, such as research tourism, recreational vehicle tourism, and skill-based tourism. To address this, it is essential to reform the institutional constraints on tourism demand and establish a supportive system for various forms of tourism. Expanding the scale and variety of tourism consumption will ultimately lead to a new development pattern for mass tourism.

In the endeavor to enhance China's global image as a diverse and inviting inbound tourism destination, the implementation of targeted marketing strategies becomes paramount. This approach entails crafting and disseminating messages tailored to resonate with the varied interests and preferences of international travelers. Achieving this goal necessitates a nuanced understanding of diverse markets and the creation of compelling narratives that showcase China's rich cultural heritage, scenic beauty, and warm hospitality.

Through a well-planned and integrated marketing strategy, China can exhibit its multifaceted appeal and position itself as a people-centric destination that is not only fun, welcoming, and captivating but also attuned to the diverse interests of inbound tourists. Utilizing digital platforms, social media, and other communication channels is crucial for disseminating captivating stories about China's cultural legacy. These narratives should spotlight iconic landmarks, festivals, and traditions to weave a vivid and enticing narrative around the concept of Culture Tourism 3.0.

应着力从旅游需求侧入手，调整目前制约旅游消费潜力释放的体制性束缚因素。中国旅游产品的多样性和旅游消费的增长取决于旅游需求的多样性和类型。然而，相关部门的个别制度和政策限制了研学旅游、房车旅游、技能型旅游等新兴旅游需求的出现。要解决这一问题，关键在于改革制约旅游需求的体制机制，建立多种形式旅游的配套体系。扩大旅游消费规模，丰富旅游消费品种，最终形成大众旅游发展新格局。

要提升中国作为多元化、极具吸引力的入境旅游目的地的全球形象，实施有针对性的营销战略至关重要。这就需要针对国际游客的不同兴趣和偏好，精心设计和传播信息。要实现这一目标，需要对不同市场有细致入微的了解，并创造引人入胜的叙事，展示中国丰富的文化遗产、美丽的风景和热情好客的待客之道。

通过精心策划和整合的营销战略，中国可以展示其多方面的吸引力，并将自己定位为以人为本的目的地，不仅有趣、热情、迷人，而且符合入境游客的不同兴趣。利用数字平台、社交媒体和其他传播渠道对于传播有关中国文化遗产的精彩故事至关重要。这些故事应突出标志性地标、节日和传统，围绕文化旅游 3.0 概念编织生动而诱人的故事。

Additionally, forming partnerships with international travel influencers, bloggers, and media outlets can amplify positive narratives, showcase the country's attractions, and dispel misconceptions. For instance, a series of promotional campaigns can highlight China's rich culinary heritage, featuring themed tours focused on regional cuisines, cooking classes, and food festivals to provide travelers with an immersive taste of China's diverse gastronomic traditions. Actively promoting and organizing cultural festivals and events celebrating various aspects of China's heritage serves as magnets for travelers interested in arts, music, and traditional festivities.

此外，与国际旅游影响者、博主和媒体建立合作关系可以扩大正面宣传，展示中国的魅力，并消除误解。例如，通过开展一系列宣传活动，突出中国丰富的烹饪遗产，以地方美食、烹饪课程和美食节为主题，让游客身临其境地领略中国多样的美食传统。积极宣传和组织庆祝中国各方面遗产的文化节和活动，吸引对艺术、音乐和传统节日感兴趣的游客。

Emphasizing China's breathtaking landscapes by curating soft adventure packages, including eco-tours, hiking expeditions, mountain tourism, and nature retreats, caters to travelers seeking outdoor activities and natural wonders. Moreover, developing wellness-themed retreats that emphasize relaxation, traditional Chinese medicine, and spa experiences responds to the growing segment of travelers prioritizing health and rejuvenation.

China should also focus on developing regional tourism brands and strengthening the joint promotion of tourism products with neighboring countries, such as Silk Road tours and Lancang-Mekong River Basin tours. Establishing a regional tourism information-sharing platform that offers real-time travel information and data can enhance cultural exchanges with neighboring countries and boost tourism development in northwest and southwest China.



通过策划以软探险为核心的旅游套餐，包括生态旅游、徒步探险、山地旅游、自然康养，突出中国壮丽景观，迎合寻求户外活动和自然奇观的旅行者。此外，开发以康养为主题的度假胜地，强调放松、传统中医和水疗体验等元素，以满足对健康恢复与活力提升需求日益增长的旅游者。

中国还应促进区域旅游品牌的建设，加强与周边国家共同推广旅游产品，比如丝绸之路之旅、澜湄河流域之旅等。建立区域旅游信息共享平台，提供实时的旅游资讯和数据。这既可以加强与周边国家的文化沟通往来，又可以促进中国西北和西南地区的旅游发展。



## Recommendation #5: Position Chinese Cities as Dynamic Tourism Hubs

### 建议 五：将中国城市定位为充满活力的旅游枢纽



As clearly advocated by WTCF, Chinese cities possess the potential to significantly contribute to inbound tourism due to their unique features such as cultural richness, business activities, museums, universities and cityscapes, alongside state-of-the-art conference facilities and event infrastructure. There are more than a dozen cities across China that could emerge as leading global MICE (Meetings, Incentives, Conferences, and Exhibitions) destinations, garnering substantial market share in regional and global events. To achieve this, it is crucial to craft a narrative that captures the essence of each city, highlighting its distinctive offerings for residents, businesses, and visitors. This narrative should be adaptable to cater to various predetermined target audiences. A comprehensive and impactful Cities of China campaign should be implemented, supported by an omnichannel marketing strategy, leveraging digital platforms, social media, traditional media, and direct engagement. Ensuring consistency in messaging across channels is essential for a unified and effective promotional effort.

正如世界旅游城市联合会(WTCF)明确倡导的，中国城市凭借其深厚的文化底蕴、友好宜商的环境与活动、博物馆、大学和城市景观，以及最先进且完备的会议设施和活动基础设施，具备为入境旅游做出重要贡献之潜力。这些城市有望成为全球领先MICE(会议、奖励、会展)目的地，在区域和全球活动中赢得可观的市场份额。

要实现这一目标，关键是要精心设计一种能抓住每个城市精髓的叙事方式，突出其为居民、企业和游客提供的独特服务，并适应各类预定目标受众。同时需采取全渠道营销战略，利用数字平台、社交媒体、传统媒体以及直接参与等手段进行全面而有影响力的宣传活动。确保各渠道信息的一致性对于统一有效的推广活动至关重要。

In response to the growing interest in urban roaming, county tourism, and rural tourism, efforts should be made to preserve local culture based on regional characteristics, improve supporting facilities, and develop tourism products and services that are intimate, charming, and welcoming. These initiatives aim to create a shared, livable, and convenient leisure environment for both hosts and visitors. Leveraging natural resources such as national parks, nature reserves, mountains, forests, fields, lakes, grasslands, and deserts, eco-tourism and research tourism should be developed in a structured and sustainable manner. Additionally, by utilizing national cultural parks and world-class, national, and local historical and cultural resources, as well as intangible cultural heritage, more cultural relic-themed trails can be cultivated to achieve a balance between social and economic benefits.

Successful city tourism promotion campaigns, targeting residents, businesses, and visitors is vital. Emphasizing quality of life, community events, and infrastructure development is important to local residents, fostering a sense of belonging and pride. Showcasing city improvements and future plans can instill ownership and encourage local pride. Forming partnerships with local businesses aligns their growth with the city's brand. Highlighting success stories of businesses, investment incentives, infrastructure, and the business-friendly environment can attract more enterprises. For prospective visitors, spotlight cultural attractions, events, and unique experiences to position the city as a must-visit destination for leisure and cultural exploration. Another approach is to promote the city as an education hub by collaborating with universities, research institutions, and industry leaders, showcasing academic excellence and opportunities for international students.

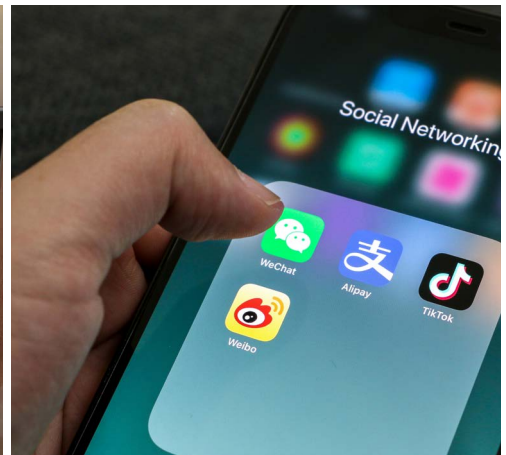
针对城市漫游、县域旅游、乡村旅游日益兴起的趋势，应立足地域特色，传承地方文化，完善配套设施，开发亲切、有魅力、受欢迎的旅游产品和服务。这些举措旨在为东道主和游客创造一个共享、宜居、便捷的休闲环境。利用国家公园、自然保护区、山地、森林、田野、湖泊、草原、沙漠等自然资源，有计划、可持续地发展生态旅游和研学旅游。此外，应利用国家文化公园和世界级、国家级、地方级历史文化资源以及非物质文化遗产，培育更多文物主题旅游线路，实现社会效益和经济效益的平衡。

要成功开展城市旅游推广活动，针对居民、企业和游客的宣传至关重要。对居民而言，强调生活质量、社区活动和基础设施发展至关重要，可培养其归属感和自豪感。展示城市的改善和未来计划可以灌输主人翁意识，鼓励当地人的自豪感。与当地企业建立合作关系，使其发展与城市品牌相一致。重点介绍企业的成功案例、投资激励措施、基础设施以及对企业友好的环境，以吸引更多企业前来投资。针对潜在游客，重点宣传文化景点、活动和独特体验，将城市定位为休闲和文化探索的必到之地。另一种方法是通过与大学、研究机构和行业领导者合作，宣传该城市作为教育中心的地位，展示卓越的学术成就和为留学生提供的机会。

## Recommendation #6: Establish a SMART Tourism Framework for International Tourists 建议六：为国际游客建立智慧旅游框架

In the era of SMART Tourism, prioritizing the enhancement of digital services is crucial for delivering a seamless and enjoyable experience to inbound tourists. While China stands out as a global leader in developing and adopting digital payment, delivery, and booking systems like Alipay/WeChat, Meituan, and Trip, these platforms and China's digital ecosystem are often difficult to access and use for outsiders. Complications arise due to difficulties in accessing payment platforms, language barriers, and restrictions on commonly used social media platforms overseas like Facebook and Google.

在“智慧旅游”（SMART Tourism）时代，优先提升数字服务对于为入境游客提供无缝、愉悦的体验至关重要。虽然中国在开发和采用支付宝/微信、美团、Trip 等数字支付、交付和预订系统方面处于全球领先地位，但这一数字生态系统的可访问性对外来游客而言却是一个挑战。由于难以进入支付平台、语言障碍以及对脸书和谷歌等常用社交媒体平台的限制，而出现了一些问题。



To elevate the overall inbound tourism experience and boost visitor spending, China should work on improving accessibility to its digital ecosystem. This involves addressing language barriers and leveraging online platforms to provide inbound tourists with easy access to relevant information, fostering a more enjoyable and accessible travel environment. The promotion of SMART city technologies can further enhance the overall experience for residents, businesses, and visitors, positioning the city cluster as a forward-thinking and technologically advanced destination. Additionally, priority should be given to continuously optimizing visa policies, including piloting the implementation of an e-visa system to reduce the time required for tourists in obtaining visas. Simplifying how foreigners book internal train and air tickets online should also be prioritized.

为提升入境旅游的整体体验并促进游客消费，中国应努力改善其数字生态系统的可访问性。这包括消除语言障碍，利用在线平台为入境游客提供便捷的相关信息，营造更愉快、和无障碍的旅游环境。推广智慧城市技术可以进一步提升居民、企业和游客的综合体验，并将城市群定位为一个具有前瞻性和技术先进的目的地。此外，持续优化签证政策应成为优先开展的工作，通过试点性推广电子签证系统，减少游客的办理签证的时间。重点考虑增加外国人在线预订国内火车票和机票的便捷性。

To successfully advance the digitalization of cities and destinations across China to prepare for the coming inbound tourism boom, collaboration with influential online travel platforms and social media channels is imperative. By partnering with platforms that boast significant user bases and influence in the tourism sector, visibility can be amplified, reaching a broader audience. In the realm of SMART tourism, destination digitalization can be further enhanced with features like real-time information updates, digital payments, interactive maps, exclusive discounts on attractions, and personalized recommendations based on user preferences. As cities embrace digital transformation, the integration of SMART tourism in urban destinations becomes not just a practical convenience but a strategic move to attract tech-savvy tourists and elevate the destination's image as an innovative and visitor-friendly urban center.

为即将到来的入境旅游热潮做好准备，成功推进中国城市和目的地的数字化进程，与有影响力的在线旅游平台和社交媒体渠道合作是不可或缺的。通过与在旅游领域拥有庞大用户基础和广泛影响力的平台合作，可以提升知名度，并触及更广泛的受众。在智慧旅游领域，目的地数字化可以进一步增强实时信息更新、电子支付、交互式地图、专属景区折扣和基于用户偏好的个性化推荐等功能。随着城市拥抱数字化转型，智慧旅游在城市目的地的融合不仅将为游客提供便利，还是一项吸引热爱科技发烧友旅行的战略举措，进而不断加深目的地创新、友好的形象特质。



Through SMART tourism initiatives, cities and destinations across China can also create tailored content that highlights the unique attractions and experiences available to inbound tourists. This can be achieved by leveraging engaging visuals, virtual tours, and interactive elements to showcase the diversity of offerings in each location, contributing to a more immersive and personalized travel experience. WTCF and PATA will continue to advocate for advancing digital development in China's cities, particularly within the framework of SMART tourism initiatives.

通过智慧旅游计划，中国各地的城市和目的地还可以提供定制化内容，向入境游客展示独特的景点和体验。这可通过引人入胜的视觉效果、虚拟旅游和互动元素来展示各地产品的多样性，从而带来更加身临其境的个性化旅游体验。在智慧旅游倡议的背景下，世界旅游城市联合会（WTCF）和亚太旅游协会（PATA）也将继续携手倡导和提升中国城市的数字化发展。

## Concluding Remarks

### 结束语

This Green Paper confirms the vast prospects to grow China's inbound tourism sector provides six specific recommendations on how to unlock this potential. Addressing challenges and capitalizing on opportunities outlined will not only enhance the country's appeal but also contribute significantly to the global tourism landscape. As China continues to evolve as a major player in international tourism, strategic initiatives as recommended in this Green Paper will pave the way for a vibrant and sustainable future for its inbound tourism sector.

PATA and WTTC stand ready to support China's tourism leaders to accelerate the growth of inbound tourism. Through the PATA/WTTC partnership, a variety of activities aligned with the six recommendations provided above in terms of research and reporting; capacity building and training; marketing and promotion strategies; and event organization. To implement the aforementioned recommendations, it may be prudent to establish working groups that include members of government, industry, academia and civil society.

本绿皮书得出结论，中国入境旅游行业具备巨大的增长和发展潜力，并就如何释放这一潜力提出了六项具体建议。应对挑战并充分利用上述机遇，不仅可以提升中国的吸引力，还能为全球旅游业发展的格局做出重要贡献。随着中国持续成为国际旅游业主要参与者，本绿皮书所建议的战略举措将为中国入境旅游行业奠定充满活力且可持续发展的基础。

亚太旅游协会 (PATA) 和世界旅游城市联合会 (WTTC) 随时准备支持中国旅游业领导者加快入境旅游的增长。通过亚太旅游协会 (PATA) 与世界旅游城市联合会 (WTTC) 的合作，在研究与报告、能力建设与培训、营销与推广战略以及活动组织等方面开展了与上述六项建议相一致的各项活动。为落实上述建议，建议成立包括政府、行业、学术界和民间社会成员在内的工作小组，以更好地促进中国入境游发展。



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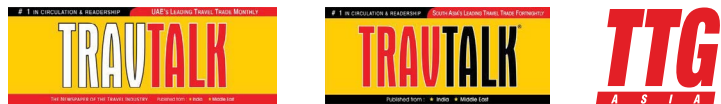


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