



中国旅游研究院
China Tourism Academy

老百姓的旅游梦想
与中国政府的不懈努力
Chinese Dream of Travel via
Government's Unremitting Efforts

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国庆七天长假，从故宫、西湖到九寨沟，从机场、高铁到高速公路，世界再次见证了中国景区和交通由于蜂拥而至的游客所带来的巨大压力。



During the past National Day golden week, from the Forbidden City, West Lake to Nine-village Valley, from the airport, high-speed rail to highway road, flock of tourists brought big pressure to the scenic areas and traffic.



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从巴黎、伦敦到纽约、芝加哥，从新西兰的岛屿到东北亚的邮轮，全球大大小小的旅游目的地都在分享着中国出境旅游发展所带来的商机。



From Paris, London to New York, Chicago, from islands of New Zealand to cruise ships acrossing Northeast Asia, tourism destinations all over the world are sharing the business opportunities of Chinese outbound market.



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中国游客的不文明行为成为世人瞩目的焦点。中国游客的一举一动似乎从来没有像今天这样牵动世界经济、政治和文化的神经。



While unpleasant behaviors of Chinese tourists has been widely criticized. Chinese tourists has have never ever affected so much of world's economy, politics and culture.



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在纷繁复杂的现象背后，事情的本质又是什么呢？

What's the nature behind the various phenomena?



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中国正在进入老百姓旅游权利全面觉醒的新时代，
中国旅游正处于大众化发展的初级阶段。

China is entering a new era, with its people's travel demands booming. China tourism is still in the primary stage of mass travel.



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在一个13亿多人口的大国，一个转型进程中的发展中国家发展旅游，如何通过制度创新和市场创新让更多的国民能够参与到旅游中来？如何完善公共服务和商业服务让游客分享受更高的旅游品质？以及，如何在旅游活动中持续提高国民的综合素质？

with a population of 1.3 billion, for a developing country in transformation, How?

-to get more people involved in tourism through institutional and market innovation.

-to improve public and commercial service with a higher quality?

-to educate citizens through tourism activities.



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1990

- 开始发展国民旅游
- **Domestic tourism**

1999

- 第一个国庆黄金周
- **1st National Day Golden Week**

2012

- 中国的国内旅游市场达到29.6亿人次，出境旅游8318万人次，入境旅游1.34亿人次，旅游总收入2.59万亿元，出境旅游消费总额为1020亿美元
- **2.96 billion domestic tourists, 83.18million outbound tourists, 134million inbound tourists, tourism income 2590 billion RMB, outbound travel consumption 102 billion US dollar.**

2013

- 预计国内旅游将超过32亿人次，出境旅游9500万人次，旅游服务贸易逆差将超过700亿美元
- **domestic tourists to be over 3.2billion, outbound tourists 95million, tourism trade deficit more than 70billion US dollar.**

关注一：散客化，趋势越来越明显

No.1 More FIT travelers

2012年，由旅行社组织和接待的游客比重只有3%多一些，换句话说，就是近97%的游客选择了自由行或者自助旅游，而非团队的方式出游。

In 2012, tourists received by travel agency are only 3%, almost 97% tourists are FIT travelers.



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关注二：消费指向更加多元化

No.2 More diversified Spending



几乎所有当代民众的生活空间游客都会进入，不仅仅是观光，他们还会在这些空间中购物、娱乐和参加各种活动，体验生活在路上的别样精彩。

Tourists will experience local life, through not only sightseeing, but also shopping, joining local activities, to taste a colorful life on road.



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关注三：年轻人正在改变旅游的世界

No.3 Yong people are revolutionizing tourism world

无论是团队游客还是自助旅游的散客，45岁以下的年轻人都已经占到80%以上的市场份额。

No matter group travelers or FIT market, young people under age 45 are over 80%.



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HANTING INNS & HOTELS



桔子酒店

pod inn
布丁酒店连锁



中信产业投资基金管理有限公司
CITIC PRIVATE EQUITY FUNDS MANAGEMENT CO., LTD.



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年轻人不仅是旅游消费市场的主力群体，他们也同样改变旅游供给的产业地图和竞争态势。

Young people are not only the pillar of tourism consuming, but also changing the structure and situation of the industry.



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中国政府和旅游业界已经认识到了这样的变化带给我们的挑战，并先后明确了相应的国家意志和政府战略。

Chinese government and the industry have realized the challenge, and have declared attitude of the state and the strategy.



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2009.12

- 《关于加快旅游业发展的意见》
- **Opinion on accelerating the development of tourism**

2013.02

- 《国民旅游休闲纲要》
- **Outline of National tourism & leisure**

2013.04

- 《中华人民共和国旅游法》
- **Tourism law**
- 《国内文明行为公约》
- **Convention of civilized behavior**
- 《中国公民出境旅游文明指南》
- **Chinese citizens outbound travel guidebook**

旅游市场主体多元化竞争格局的挑战 challenge of diversified industrial competition

近年来有越来越多的战略投资者、金融机构、产业基金和风险投资者开始进入旅游领域。还有大量的中小企业、微型企业，千千万万的创业创新者在进入或者考虑进入旅游行业。

Recently, more and more investors, financial institutions, PC, VE are entering tourism as well as SMEs. Tourism is becoming a popular cake.



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只有让投资主体特别是风险投资者和产业基金与充满生机与活力的创新创业者深度融合，才能在基于移动互联网的旅行服务、消费点评、汽车租赁、精品酒店、旅游购物和娱乐产品开发等旅游衍生消费领域培育出新的商业形态，以满足国民大众不断增长且日渐变化的旅游休闲需求。

Only to attract VC, PE and entrepreneurs to work together, can we develop new business in the fields of online comment, car rental, boutique hotel, shopping, entertainment and so on, to meet with travelers' increasing and diversifying demand.



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迅速扩大的旅游服务贸易逆差也是中国政府和旅游业界面临的新挑战。2012年分国别海外游客总花费排行榜上，中国以1020亿美元位居首位。旅游服务贸易逆差达519亿美元，今年预计会超过700亿美元

Expanding tourism trade deficit is also a new challenge for Chinese government and the industry. China leads the outbound tourist spending list in 2012, with 51.9billion dollar, which is expected to be over 70billion dollar in 2013.



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我们要在更大范围内形成共识，始终把旅游发展的宗旨和导向牢牢建立在公民的旅游权利基础上，坚持让更多的人群得以参与旅游，享受品质服务，并从旅游发展的进程中获益

We should come to an consensus, to develop tourism on the basis of realizing citizens' travel right, to have more people engaged in tourism, enjoy the service and benefit from the its development.



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