

# 旅游业已成为推动全球化发展的重要力量

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世界旅游城市联合会洛杉矶香山峰会开幕，世界旅游城市联合会秘书长宋宇围绕“全球化与世界旅游城市发展”这一主题，发表了题为《旅游业已成为推动全球化发展的重要力量》的主旨演讲。



2017年世界旅游城市联合会香山旅游峰会在美丽的洛杉矶市隆重举办。这次峰会的主题是“全球化与世界旅游城市发展”，主要目的是，充分发挥旅游城市在世界旅游和经济发展中的枢纽作用，进一步促进世界旅游城市之间的合作共赢，为世界经济的发展提供有力支持。结合这一主题，我谈三点思考：

## 一、全球化趋势改变了世界旅游业发展的格局

全球化是当今世界经济的重要特征之一，也是当今世界发展的重要趋势。旅游业不仅是全球化的主要受益者，也是全球化重要的推动者。

第一，全球化趋势加快了基础设施的联通步伐，带动了世界旅游业的蓬勃发展。全球化发展有利于资源要素在全世界范围的有效配置，使商品和服务消费更符合消费者的需要。为构建联通全球的供应链网络，各城市都在不遗余力地推进基础设施互联互通步伐。更趋完善的基础设施网络促进了全球资源、数据、服务和消费相互连接，世界旅游业合作版图加快形成。据研究，到2025年，全球交通基础设施投资预计年增长在5%左右，一批跨区域交通基础设施的兴建，特别是廉价航空公司的发展，加速了旅游空中走廊的发展，促进了大众旅游时代的到来。基础设施的互联互通，推动了旅游产业的发展，从过去20年的发展趋势看，无论是旅游人次，还是旅游收入，世界旅游业年平均增长率都在6%~7%，基本做到了每十年翻一番。

第二，全球化趋势推动了服务贸易的快速发展，改变了世界旅游业的格局。全球化促进了世界市场的不断扩大和区域协调统一，使国际分工更加深化。经济全球化和区域一体化深刻地影响着世界旅游业的发展轨迹，也打破了原有的旅游市场格局。旅游业是服务贸易的重要内容，1950年，欧美地区旅游市场占世界旅游市场的96%，到2016年亚太地区旅游份额上升到了32%，其中，2016年中国出境旅游达到1.22亿人次，出境旅游消费超过2150亿美元。世界旅游市场基本形成欧洲、北

美与亚太三足鼎立的局面。根据世界旅游城市联合会《世界旅游经济趋势报告》研究，预计到2018年，新兴经济体旅游人次增长将达到8.7%，旅游总收入增速将达到9.3%，显著快于发达经济体。

第三，全球化趋势促进了科学技术的传播，丰富了世界旅游的运营模式。随着互联网技术的广泛应用，旅游者获得旅游信息的渠道，参与旅游预定的方式和体验旅游品质的途径都发生了深刻变革，多元化、个性化、定制化等新的旅游方式正在形成。在追求个性化的浪潮下，未来旅行客人特别是中短距离区域内的家庭旅游份额将逐步增加。2008年，全球在线旅游机构的销售复合增长率仅有8%，到2016年已经上升到46%。据世界旅游城市联合会《中国公民出境旅游消费市场调查报告》显示，中国游客出境旅游意愿中，超过50%的游客选择自由行、半自由行、自助游和定制旅游；在各类主题旅游意向中，近80%的中国游客选择了邮轮游，其后依次为家庭游、亲子游、蜜月游、购物游和自驾游。

当前，新一轮科技和产业革命正孕育兴起，国际分工体系加速演变，全球价值链深度重塑，这些都给经济全球化赋予新的内涵。国际社会应加快完善世界治理结构，积极引导全球化进程向着更加开放普惠的方向发展。

## 二、旅游业成为推动全球化发展的重要力量

旅游业是世界经济中的朝阳产业，2017年，在世界经济需求增长的背景下，旅游业趁势而上，成为拉动世界经济增长的战略性、综合性、支柱性产业。

第一，旅游产业持续发展，成为拉动世界经济发展的重要动力。根据世界旅游城市联合会测算，2017年，全球旅游总人次将达到119亿人次，旅游总人次达到全球人口的1.6倍。旅游业GDP

占全球 GDP 的总量超过 10%。2013 年至 2017 年五年间，全球旅游投资的年均增长达到 4.2%，2017 年全球旅游投资规模将达 8400 亿美元左右，创 10 年来新高。据联合国世界旅游组织统计，预计到 2020 年，仅国际游客就可以达到 16 亿人次，国际旅游收入将达到 2 万亿美元，直接提供就业岗位 1.3 亿个，旅游业已经成为增加出口收入和非技术劳动力就业的有效载体。

第二，旅游城市加快发展，成为推动世界旅游业发展的重要引擎。城市是世界旅游的主要目的地和客源地，在世界旅游经济发展中发挥着不可替代的重要作用。随着基础设施互联互通步伐明显加快，城市在全球旅游发展中的中枢地位越来越突出，一批超大型旅游节点城市迅速崛起，成为旅游供应链的关键节点。据联合会《世界旅游经济趋势报告》统计，目前世界上已经形成伦敦、巴黎、纽约、东京、北京、上海六大超级城市群，成为旅游的主要集散地，而以世界旅游城市联合会为例，目前联合会 128 个会员城市的旅游经济总量达到 1.89 万亿美元，占全球旅游经济的 37%。

第三，共享经济迅猛发展，成为改变旅游发展业态的活力因子。共享经济是全球化发展的新兴方向。旅游业和共享经济有着天然联系，随着共享经济的快速发展，世界旅游的产业、形态和发展格局也将随之发生很大变化。目前，全球共享经济企业已经超过 1 万家，2015 年共享经济主要业务在欧洲实现价值 300 亿美元，年复合增长率高达 36%。特别是在旅游发展方面，以共享经济为主要特征的企业已经深入到旅游业的各个方面，成为带动世界旅游业发展最具活力的动力因子。2016 年，联合会会员单位 Airbnb 的房源已经覆盖全球 194 个国家，可同时提供 150 万个房源。

### 三、积极推动旅游城市之间的交流合作

世界旅游城市联合会（WTCF）是世界上第一个以旅游城市为主体的旅游组织，始终秉承“旅游让城市生活更美好”的核心价值观，致力于推动世界旅游城市的交流与合作。世界旅游城市联合会希望推动会员城市之间的资本、技术、人员要素流动，提升旅游城市对世界经济的影响力，为旅游的全球化注入新的活力。

第一，积极推进旅游资源在全世界的开放共享。坚持双赢、多赢、共赢的理念，通过加强双边和多边合作，打破制度壁垒，探索旅游城市之间多元合作机制，建立更加开放的旅游市场，实现资源要素在全世界的充分流动和有效配置，促进包容协调的全球价值链发展。深入挖掘不同国家、不同地区的旅游资源和传统文化，推出更多高品质的旅游产品，塑造更多特色化的旅游产品。对接“一带一路”倡议，加快旅游走廊和节

点城市建设，重点打造陆上文化旅游和海上丝绸之路国际旅游精品线路。

第二，大力推动世界旅游城市可持续发展。根据国际游客的多元需求，发挥旅游城市的平台和枢纽作用，大力推动生态环境、基础设施和公共服务设施建设，有针对性地提升旅游城市综合承载力。搭建旅游企业与旅游城市的沟通协调的平台，充分考虑当地民众的文化传统和生活方式，合理安排旅游团队和旅游行程，减少过度旅游对城市生活的不利影响。

第三，加快推动旅游服务更加便捷规范。注重发挥世界旅游城市评价体系的导向作用，推动世界旅游城市数据平台建设，提高旅游服务的便捷化、规范化、标准化水平。引导有关国家和旅游城市进一步放宽出入境限制，完善证照互认机制，推动国家旅游签证便利化。鼓励旅游城市增加国际通用语言服务，完善旅游标识服务系统，推动旅游城市基本服务国际化。

第四，努力营造安全和谐有序的旅游环境。安全是旅游发展的根本保障。坚持以对话化解争端、以协商化解分歧，强化旅游城市社会安全治理和旅游市场管理，营造区域间安全有序的旅游环境。加快建立旅游城市应急服务体系，完善旅游保险和救援机制，探索多方参与的矛盾纠纷快速解决机制，推动世界旅游业向着更加包容和谐的方向发展。



雅典 图 / 全景



# Tourism is a force of



太原夜景 图 / 全景

The WTCF Fragrant Hills Tourism Summit 2017 is held in the beautiful city of Los Angeles under the theme Impact of Globalization on World Tourism City Development. The purpose of the summit is to leverage the pivotal role of tourism cities in world tourism and economy, further promote win-win cooperation among world tourism cities and bolster support for world economic development. In this connection, I want to share with you the following three observations:

## ***1. Globalization is reshaping the landscape of world tourism development.***

Globalization is an important feature of the world economy today, and a major trend of economic and technological development. The tourism industry is not only the main beneficiary of globalization but also its major driving force.

First, globalization has accelerated the building of connected infrastructures and stimulated the boom

of world tourism. Globalization contributes to the effective allocation of resources and factors across the world, making goods and services more tailored to the needs of consumers. To build a global network of supply chain, all cities are making utmost efforts to strengthen infrastructure connectivity. A better-shaped infrastructure network contributes to the connectivity of resources, data, services and consumption, and the rapid progress of tourism cooperation. According to the relevant research, global investment in transport infrastructure is expected to grow by 5% per year by 2025. The construction of cross-regional transport infrastructures, especially the expansion of budget airlines has accelerated the building of tourism air corridors, and contributed to the development of tourism for all. Infrastructure connectivity is also instrumental in the development of the tourism industry. The development trend of the past 20 years suggests a 6%~7% annual growth in both the number of tourists and tourism revenue, with the figure being doubled in

# major driving globalization

Song Yu, Secretary-General of WTCF

The WTCF Fragrant Hills Tourism Summit 2017 was held in Los Angeles under the theme Impact of Globalization on World Tourism City Development. Song Yu, Secretary-General of WTCF, made keynote speech at the Opening Ceremony.

each decade.

Second, globalization has triggered the rapid growth of trade in services and changed the landscape of world tourism. Globalization has facilitated the expansion and regional coordination of the world tourism market and intensified the international division of labor. Economic globalization and regional integration have reshaped the trajectory of the world tourism industry and transformed the existing tourism market. Tourism is an important part of trade in services. In 1950, Europe and America accounted for 96% of the world tourism market, and by 2016, the share of the Asia-Pacific region increased to 32%, with 122 million outbound tourist visits and over 215 billion US dollars of outbound tourism consumption contributed by China. As such, a world tourism market pillared on Europe, North America and Asia-Pacific has taken shape. According to the WTCF Report on World Tourism Economy Trends, emerging economies are expected to register an 8.7% growth in total number of tourists, and a 9.3% growth

in total tourism revenue by 2018, both of which will be significantly faster than that of advanced economies.

Third, globalization has facilitated the dissemination and application of science and technology, and enriched the operation model of world tourism. With the extensive application of internet technologies, profound transformation has taken place in the channels through which tourists access tourism information and in the means by which they make tourism reservations and experience tourism quality. Diversified, personalized and customized tourism models are emerging. Given the growing consumer needs for personalized tourism products, the share of family tours, especially within short- and medium-distance, will steadily increase. The compound growth rate in the sales volume of global online tourism agencies jumped from 8% in 2008 to 46% in 2016. According to the Market Research Report on Chinese Outbound Tourist (City) Consumption published by WTCF, more than 50% of outbound Chinese tourists prefer fully-independent, semi-independent,

backpacking and customized tours. As for the theme of the tours, almost 80% of the Chinese tourists choose cruise tourism, followed by family, parent-child, honeymoon, shopping and self-drive trips.

A new round of technological and industrial revolution is in the making. The system of international division of labor is rapidly evolving and the global value chain is going through deep adjustment. All these have added new contents to economic globalization. The international community should speed up the improvement of the global governance structure and make globalization more open and beneficial to all.

## ***2. Tourism is a major driving force of globalization.***

Tourism is a sunrise industry in the world economy. In 2017, seizing the opportunity of growing international demands, tourism has emerged as a strategic, comprehensive and pillar industry driving global economic growth.

First, the tourism industry has maintained growth momentum and served as a major driver of world economic development. WTCF estimates that the total number of global tourist visits will reach 11.9 billion person-trips by 2017, which is 1.6 times of the global population. Total tourism revenue will equivalent to 6.75% of global GDP. Global tourism investment recorded an average annual growth of 4.2% between 2013 and 2017, reaching 840 billion US dollars in 2017, hitting a ten-year high. According to the UNWTO statistics, international tourist arrivals are expected to reach 1.6 billion by 2020, international tourism revenue may reach 2 trillion US dollars and 130 million direct jobs will be provided. The tourism industry has grown into an effective vehicle for boosting export income and creating non-skilled jobs.

Second, tourism cities have embarked on a fast-track of development and provided a key engine for world economic development. Cities are the primary destinations and tourist sources of world tourism, playing an irreplaceable role in world tourism economy. As the development of infrastructure connectivity picks up pace,

the pivotal role of cities in global tourism development is becoming more prominent. The rapid rise of a group of mega tourism cities has provided the essential connecting points in the tourism supply chain. According to the statistics of the WTCF Report on World Tourism Economy Trends, the world now has six super city clusters, namely London, Paris, New York, Tokyo, Beijing and Shanghai. They have all become major centers of tourism activities. Take WTCF as an example, the tourism economy of WTCF's 128 member cities now amounts to 1.89 trillion US dollars, accounting for 37% of the world's total.

Third, sharing economy has registered strong growth and become a new dynamic in tourism development. Sharing economy is the new direction of globalization. There is a natural link between the tourism industry and sharing economy. With the rapid growth of sharing economy, significant changes have taken place in the industries, formats and development landscape of world tourism. At present, there are over 10 000 companies based on sharing economy around the world. In 2015, sharing economy businesses generated 30 billion US dollars of value in Europe, achieving a compound annual growth rate of 36%. Most notably, in the field of tourism, companies that are defined by sharing economy have reached all corners of the tourism industry, and become the most dynamic factor driving world tourism development. In 2016, Airbnb, also a member of WTCF, expanded its bookable rooms to 194 countries, offering a total of 1.5 million rooms.

## ***3. WTCF promotes exchanges and cooperation among tourism cities.***

World Tourism Cities Federation (WTCF) is the world's first tourism organization focusing on tourism cities. Following the vision of Better City Life through Tourism, WTCF is committed to promoting exchanges and cooperation among world tourism cities. By facilitating the flow of capital, technology and personnel between member cities, WTCF aims to boost the impact of tourism cities on world economic development and inject new impetus into tourism globalization.

First, promoting the open sharing of tourism resources

across the world. We should stick to the win-win approach and strengthen bilateral and multilateral cooperation to break the institutional barriers, explore the mechanism of multi-faceted cooperation among tourism cities, build a more open tourism market, realize the unimpeded flow and effective allocation of resource factors on a global scale, and promote the inclusive and coordinated development of global value chain. We should explore the tourism resources and cultural traditions of different countries and regions, develop more high-quality tourism products and create more tourism products with distinctive features. We should strengthen complementarity with the Belt and Road Initiative, speed up the building of tourism corridor and node cities, and develop classic cultural tourism routes overland and international tourist routes along the maritime Silk Road.

Second, promoting the sustainable development of world tourism cities. To meet the diversified needs of international tourists, we should leverage the role of tourism cities as the platform and hub, strengthen the building of ecological environment, infrastructure and tourism service facilities, and expand the overall capacity of tourism cities with targeted efforts. We should set up the platform for communication and coordination between tourism businesses and tourism cities, take into full consideration the cultural traditions and lifestyles of local communities, make proper arrangements for

tourist groups and their travel itineraries, and reduce the negative impact of excessive tourism on city life.

Third, making tourism services more convenient and well-regulated. We should leverage the guiding role of the evaluation system of world tourism cities, promote the building of world tourism cities data platform and make tourism services more convenient, well-regulated and standard-based. We should encourage relevant countries and tourism cities to further relax restrictions on border entry and exit, improve the mechanism of mutual certificate recognition and promote the facilitation of tourism visa. We should encourage tourism cities to deliver services in more universal languages, improve the system of tourist signs, and promote the internationalization of tourism services.

Fourth, building a safe, harmonious and orderly tourism environment. Safety is the fundamental guarantee for tourism development. We should stick to dialogue and consultation in resolving differences and disputes, strengthen public order and tourism market management in tourism cities, and foster a safe and orderly inter-regional tourism environment. We should speed up the building of emergency service system of tourism cities, improve the tourism insurance and rescue system, explore a multi-party mechanism for quick dispute settlement, and promote more inclusive and harmonious development of world tourism.

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图 / 全景