

WTCCF助力旅游城市发展

文 / 世界旅游城市联合会秘书长 宋宇



城市是旅游业发展的重要载体，旅游业是推动城市发展的重要产业，两者相互依存、相得益彰。当今世界，一座现代化的城市不但应当是宜居之城，也应是宜游之城；不仅是当地居民的幸福家园，也应成为游客向往的旅游乐园。秉承这样的理念，世界旅游城市联合会成立两年来，努力把握新机遇、迎接新挑战、搭建新平台，在促进会员城市分享旅游发展经验、增进合作与交流等方面发挥着越来越积极的作用，为旅游城市持续发展和旅游业健康发展注入了强劲动力，受到国际旅游业界的广泛关注。



联合会助力旅游城市发展

旅游业的加速发展，为联合会助力旅游城市发展创造了前所未有的重要机遇。

从世界旅游业的发展大势看，加快发展旅游业成为很多国家和地区的战略决策，特别是亚太地区旅游业保持强劲增长，旅游业发展重心逐步东移，为联合会同世界各国和地区开展旅游合作带来了新契机。

从中国旅游业的发展趋势看，中国旅游业积极应对全球经济危机的影响，出境旅游逆势大幅上扬，始终保持两位数的增长速度。2012年、2013年，中国公民出境游分别达8300万人次和9700万人次，成为世界第一大出境客源市场。2013年，中国以境外旅游消费1020亿美元超过美国和德国，成为世界第一旅游消费国，为全球旅游业的景气指数做出了贡献。预计今后5年，中国旅游市场规模将达2万亿美元，出境旅游将超过4亿人次，使全球对

中国旅游业的发展充满期待。中国国家主席习近平在2013年博鳌亚洲论坛开幕式上发表重要讲话时，郑重提出：中国将大力促进亚洲和世界发展繁荣。我们坚信，中国越发展，越能给世界旅游业带来发展机遇。

从联合会自身的发展形势看，它是世界上首个以城市为主体的国际旅游组织。我们高兴地看到，联合会的力量日益壮大，目前会员单位已经涵盖世界主要著名旅游城市，必将结出联合会自身与会员单位共同发展的“双赢”硕果。

挑战即机遇

机遇与挑战并存，希望与困难同在。我们在看到发展机遇的同时，更要看到前进道路上的挑战和困难。微博、微信、APP等新媒体的出现，使传统旅游方式受到挑战；世界旅游城市联合会的组织机构、运行机制和品牌打造，



还有待进一步完善；各会员单位特别是会员城市之间，存在的旅游业发展水平不一、执行管理标准不一等问题，已经成为加强合作交流、实现互利共赢的障碍；中国出境游市场表现出来的强劲态势，在给目的地城市带来利好经济效益的同时，也对跨越文化和习惯差异的接待服务能力提出了挑战。

中国有句俗语：“挑战即机遇，压力即动力”。意思是说，挑战和机遇、压力和动力是可以互相转化的，挑战的背后蕴藏着机遇，面临的挑战越大获得的机遇也越大。因此，只要我们团结一心、群策群力，充分尊重不同国家和地区的城市特色，不断创新交流合作机制，就没有克服不了的挑战和困难。

充分发挥平台优势

推动旅游城市建设和城市旅游发展，是联合会的使命所系、职责所在。联合会基于创立宗旨、发展定位和世界旅游业发展趋势，围绕“食、住、行、游、购、娱”旅游六要素，搭建了信息、学术、数据、活动、合作、培训“六大”新平台。我们更应抓住当下、着眼未来，立足和用好这个平台，大力推动旅游城市建设和发展。

充分发挥平台的交流合作优势。积极推进旅游国际和区

域合作，探索建立国际旅游合作机制，融入国际旅游市场体系，完善高层互访和对话机制，推进城市间经济、科技、文化、教育、体育、环境、城市管理全方位交流合作。

充分发挥平台的宣传推介优势。着力发挥联合会官方网站、移动互联客户端和微博、微信、APP等新媒体，以及《世界旅游城市》、《城市资讯》等专业性、时尚性杂志作用，推动会员城市旅游宣传向新媒体化、大数据化转变。

充分发挥平台的学术资源优势。通过发布年度《中国出境游市场分析》、创办联合会会刊、推送《会员资讯》，建立会员旅游城市数据库及世界旅游城市评价体系，制定《世界旅游城市服务标准》等途径，实现资源整合最优化、信息共享最大化。

充分发挥平台的人才培训优势。着眼培养高素质旅游从业人员，编制和落实初期、中期、远期人员培训规划，有针对性地培训各国选送的导游人员、青年学者和旅游行业高级管理人才，为世界旅游业发展提供强大的智力支持。

此次论坛以“WTCTF助力旅游城市发展”为主题，聚焦旅游城市可持续发展问题，具有很强的现实意义。我相信，通过这次论坛，联合会自身的建设一定能够更进一步，世界旅游城市的发展一定能够更具活力，世界旅游业的未来一定能够更加美好！



WTTCF Assists in the Development of Tourism Cities

City is the important base of tourism development while tourism is an important sector that promotes the development of a city. The two are dependent on and enhance each other. Nowadays a modern city should not only be a city fit for living but also be a city fit for traveling. Aiming at making city local people's happy home and tourists' paradise, World Tourism Cities Federation has tried to take the advantage of new opportunities, meet new challenges, and build new platforms. It is playing a more and more active role in promoting experience sharing, cooperation and exchange among its members, injecting vigor into the sustainable development of tourism cities and the healthy development of tourism, and attracting great concern from international tourism circle.



The rapid development of tourism industry has brought unprecedented opportunities for WTTCF to assist in the development of tourism cities.

From the perspective of world tourism development, it has become the strategy of many countries and regions to accelerate the development of tourism. Tourism has maintained strong growth momentum especially in the Asian Pacific region and the eastward shift of the focus of tourism development has brought new opportunities for the cooperation in tourism between WTTCF and different countries and regions.

From the perspective of tourism development in China, China's tourism industry has actively fought the global economic crisis and its outbound tourism has kept a

double-digit growth despite the influence of economic crisis. The number of Chinese outbound tourists in 2012 and 2013 reached 83 million and 97 million respectively, making China the largest outbound tourist market. In 2013, surpassing US and Germany, China became the largest consumer of outbound tourism with an expenditure of 102 billion US dollars and made a great contribution to global tourism industry. It is predicted that the value of Chinese tourism market will reach 2 trillion US dollars and the number of Chinese outbound tourists will surpass 400 million in the next five years, making the world filled with expectation towards China. Chinese president Xi Jinping asserted in his speech at the opening ceremony of Boao Forum in 2013: China will vigorously promote development and prosperity in both Asia and the world. The more China

grows itself, the more development opportunities it will create for the rest of Asia and the world.

From the perspective of WTTCF's own development, as the first international tourism organization for cities, WTTCF is growing stronger day by day and its present members cover main world famous tourism cities and a win-win situation for both WTTCF and its members will be realized.

Challenge is opportunity

Opportunity and challenge coexist. So do hope and difficulty. We should not only hold out hope for development opportunities but also see the challenges and difficulties. With the availability of new media like microblog, Wechat and APP, traditional tourism mode is being challenged. The organizations, operation mechanism and brand building of WTTCF need to be improved. Problems like different development levels and management standards have become barriers to the communication and mutual benefit between WTTCF members, especially its city members. The rapid growth in China's outbound tourism market has brought economic benefits as well as challenges in intercultural communication to tourism cities.

A Chinese saying goes that challenge is opportunity and pressure is motivation. That is to say challenge and opportunity, and pressure and motivation are interchangeable. Challenges contain opportunities, and the greater a challenge is, the greater an opportunity is. Therefore, so long as we unite together, bring the initiative of each side into full play, respect the differences in other countries and regions, and keep on innovating new mechanism for exchange and cooperation, there is no difficulty we cannot solve.

Make full use of the platform of WTTCF

To promote the construction of tourism cities and the development of urban tourism is the objective of WTTCF. WTTCF has built six new platforms of information, academia, data, activity, cooperation and training on eating, living, transporting, traveling, shopping and entertaining based on its targets, development orientation, and world tourism development trends. We should make full use of the platform of WTTCF to propel the construction and development of tourism cities.

We should make full use of the advantage of WTTCF as a promotion platform to make the tourism campaign of its city members rely more on new media and big data by using new media like WTTCF's official website, mobile internet, microblog, Wechat, APP and specialized fashion magazines like World Tourism City and World Tourism Cities Monthly.

We should make full use of the advantage of WTTCF as an academic platform to build the database of its city members and world tourism city evaluation system by publishing annual Market Research on Chinese Outbound Tourism, journals and Member Information, and set up World Tourism Cities Service Standards to best integrate resources and share information.

We should make full use of the advantage of WTTCF as a talent training platform to cultivate high-quality tourism personnel, formulate and implement training programs of different time periods, and carry out training targeted at guides, young scholars and senior tourism management personnel selected by different countries, and provide strong intellectual support for world tourism development.

With "WTTCF Assists in the Development of Tourism Cities" as its theme, this forum focuses on the sustainable development of tourism cities and has a great realistic meaning. I believe WTTCF will further improve itself, the vigor for development of world tourism cities will be enhanced, and the future of world tourism will be better through this forum.



新媒体应用 开拓对外传播旅游文化新途径

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近年来，移动互联网和社交媒体发展方兴未艾，大数据、云计算、物联网等新一代互联网技术又映入眼帘，深刻地改变着人们的生活和工作方式。作为高度依赖信息传播的产业，在新媒体时代的变革下，旅游业的竞争格局和价值流动随着信息传播形态的改变，不断向个性化、智慧化转型。而“对外文化传播”是一个国家通过文化信息的展示与交流，获取他国对本国文化的认同，争取他国配合与支持的重要途径。随着科技的发展，新媒体应用已成为开拓对外传播旅游文化的新途径。



对外文化传播塑造国家形象

在国际传播的发展进程中，文化交流与政治、经济互动，始终占据着重要的地位。“对外文化传播”是一个国家通过文化信息的展示与交流，获取他国对本国文化的认同，争取他国配合与支持的重要途径。文化的内涵代表了国家的软实力，随着文化因素在国际事务中影响越来越

大，通过对外文化传播来塑造国家形象备受重视。文化传播与交流虽然不能消除各种冲突和战争，但它像润滑剂一样有助于消除国与国之间的误读、误解与偏见。通过旅游这样一种形式，一方面民间交流增多，使民众之间加深了解与沟通，另一方面也可以缓和某些紧张的国际气氛，有助于国际事务的妥善处理。

当今世界传媒技术与手段的迅猛发展，突破了文化传播的区域性与国界性的限制，国际文化传播使各民族、各地区间的文化相互交融，相互影响，通过传播文化实现人与人和国与国之间的直接沟通，国际传播在总体上促进各民族文化，在撞击中融合，在冲突中发展，它对国际间的政治影响表现出举足轻重的作用。

新媒体新技术触发旅游业智慧转型

2014年，是中国接入国际互联网的第20个年头。20年来，以互联网为代表的信息技术日新月异，以前所未有的深度和广度推动着经济社会的发展与变革。特别是近年来，移动互联网和社交媒体发展方兴未艾，大数据、云计算、物联网等新一代互联网技术又映入眼帘，深刻地改变着人们的生活和工作方式。作为高度依赖信息传播的产业，在新媒体变革的时代背景下，旅游业的竞争格局和价值流动随着信息传播形态的改变，不断向个性化、智慧化转型。

2014年上半年，美国用户通过移动设备访问旅游网站的用户比例为58%，而在英国这一比例高达69%，在使用智能手机预定过旅游服务的旅行者中，有十分之七的人会在未来一年内再次使用智能手机预订，23%拥有智能手机的旅行者表示可能会在接下来的一年内使用智能手机

进行预订。而在中国，已有近四成游客将在2014年使用手机客户端预订旅游服务，相比一年前增长了十倍。传统和在线旅游服务商都全面发力移动端，旅程分享、目的地导览、途中服务等移动端服务模式不断涌现。现在用户已经可以通过众多媒介平台进行旅程的规划、预定、结算及分享。从而用更低的成本获得更好的旅游体验，充分享受新媒体在旅游产业带来的变革红利。

传统旅游行业拥抱新媒体之变

在数字媒体发展的大背景下，各国家和旅游城市纷纷开始重视新媒体在旅游中的运用。2009年，澳大利亚昆士兰旅游局和YouTube合作策划的“世上最好的工作”招聘网站，在全球招聘大堡礁看护员，掀起的轰动效应成为新媒体旅游营销的一个经典案例。通过制造话题，充分调动媒体热情开展病毒式传播，在世界范围内有效推广了大堡礁的知名度与美誉度，最终促进了整个昆士兰旅游业大跨步发展。

2011年底，瑞典为了推广国家形象，吸引更多的游客，也曾发起“瑞典监护人”计划。在此次创新型活动中，每个瑞典公民都可以申请成为瑞典政府官方Twitter账号的管理员，用官方账号发表自己对于瑞典的看法，向



世界各地的网友展示自己眼中的瑞典，这极大地吸引了各国游客的关注。

洛杉矶为了开拓中国游客市场，更是推出“China-ready”（你好，中国）计划，包括搭建中文网站等一系列新媒体计划。

今年以来，许多国家的旅游局为了吸引中国游客的关注，不断突破尝试，纷纷进行“微”旅游宣传，建立官方微信、微博、Instagram账号，拍摄微电影，与视频网站及新浪微博等社交网站合作推广；同时一些国内旅游城市还开设了脸谱、推特官方账号，专门吸引海外用户的关注。

旅行者信息获取和消费行为发生着巨大的变化

在新的数字媒体时代，旅行者信息获取和消费行为也发生着巨大的变化。随着智能手机和平板设备的迅速普及，过去游客通过互联网主要进行的是旅游前的信息获取、在线预订和旅游后分享，而现在，只要你有一台智能手机，不仅可以随时随地了解旅游目的地的资讯、攻略、导览及用户评价，还可以通过简单的几个步骤就完成航班、酒店、门票等旅游产品的预定和支付，更可以即时租车、打车、查询最优路线，通过随身翻译应用克服语言障碍进行跨语种跨文化交流，借助智能3D导游应用，实时了解所在各景点的背景及特色，并在旅途中，随时进行分享点评互动等。

极其丰富而便捷的旅游移动应用从不同层面和维度对整个旅游产业进行服务细分和信息重组，使旅行者获取和解读旅游信息的成本大大降低，从而成为信息的整合者及创作者。UCG已经成为旅行者们最热衷的形式，而从移动产品和专业网站、社区获取的“驴友”攻略和碎片化阅读信息逐渐成为年轻一代旅行者的重要决策参考。与此同时，个性化、定制化和创新性的旅游产品和服务将逐渐成为他们的首选。

新媒体带来的旅游文化展示新途径

随着科技的发展，触摸屏、虚拟现实、幻影成像、全息影像、互动投影、互联网电视等技术及产品进一步成熟，最终成为旅游文化魅力完美呈现的物理载体。一方面它们是旅游文化的展示平台，另一方面也是游客与旅游文化深入接触、亲密互动的有效途径。

过去，一提到中国，外国游客能想到的就是“熊猫”、“功夫”、“长城”、“故宫”，对中国广袤的地理景色，博大精深的多样文化知之甚少，他们手头能拿到的宣传材料也是为数不多的几幅照片、几部宣传片。现

在，只要动一动手指，源源不断的各种信息扑面而来，除了海量的图文、音频、视频内容外，制作精美的互动产品更让人身临其境，乐在其中。通过“指尖上的中国”让海外游客充分的体验到了中国文化的魅力。这些都是新媒体带来的文化展示新契机。

新媒体展示成功提高在线交易量

与此同时，旅游产品的在线购买，支付与专业旅游资讯、服务相结合，又促进了旅游全产业链的贯通。世界旅游组织预测报告称，2014年国际游客人数将增加4%-4.5%。我们常说，“跨越国境的民众往来是国家对话的基础”，对国家如此，对城市亦是如此，如何将这部分人群转化为固定的城市文化、城市旅游的宣传大使，是保持旅游城市活力与发展的重要基础。

2013年，全球第一大旅游在线网站Priceline全年预订量为392亿美元，其中85%的预订量（333亿美元）来自国际市场，可见国际旅游市场的潜力之大。对于各个旅游城市、旅游企业来说，通过与新媒体联手开拓推广渠道，以及线上线下相结合的营销手段，有效放大了旅游产业各环节的资源优势。



中国日报重塑新媒体传播渠道

谈到新媒体传播渠道的重塑，这里我讲个小例子。20多年前我毕业进入中国日报工作，当时做夜班编辑都是传统排版，我想开创一种全新的图文表达模式，但没有现在智能方便的编辑软件，只能一个字一个字的扒，一个模块一个模块的拼，印厂的师傅每次看我来都头疼，以至于有一次我为了排好一个版面把手掌划伤，鲜血流了一地。老报人一定都有感触，那时想做国际传播非常不容易，就在那样条件下，重要的信息、数据要在短时间内代表国家官方媒体第一时间发布到美洲、非洲、大洋洲等各国去是要花大力气的，搞国际发行十分艰难，覆盖区域非常有限。

经过三十多年的发展，现在中国日报已成为一个全媒体集团。其中国日报网是全球网民获取英文中国资讯的首选网络渠道，拥有全国最具规模的英语网络采编团队，英文网日均页面访问量和独立用户数均为全国网络媒体之最。近些年来，我们在移动新媒体领域的国际传播影响力也持续增强，中国日报网移动资讯产品注册用户超过380万，覆盖15个语种、近180个国家和地区人群，高居国内媒体之首。

经过与各国使馆及官方旅游局的密切合作，在旅游新媒体领域，中国日报网打造的旅游平台“爱出国”，专注中国出境旅游市场信息服务的精准定位；汇聚旅行社出境游精品线路以及各方出境旅游达人旅行经验，它的信息容量和规模以及信息源的权威性在目前中国境内的旅游网站

中独树一帜。“爱出国”同时采用多屏加视频为特色的全媒体内容，策划并推出《大使带你全球GO》真人旅游体验节目，由各国驻华大使亲自推荐本国行程，在各个手机、PC、Pad、电视和其他应用屏幕上均可收看。目前已有几十个国家和地区进行了深度参与合作。另外，中国日报“爱出国”还自主研发了“聚合搜索传播平台”在这里，汇集用户可以编译翻阅到中外旅行的丰富信息。今年我们将推出“中国旅行者最佳出境旅游目的地”盛大评选活动，中国日报网期待与WTCTF旅游相关机构的通力合作。

合作与共享

如今，WTCTF其它兄弟媒体单位、会员单位也都在进行着数字媒体的蜕变，在这个大潮中，新媒体赋予人们话语权、传播力，增强了公开性、透明度和创造性，文化生产与传播也从来没有像今天这样丰富、多元、及时和生动。

为了更好地迎接旅游业的时代变革，我认为传统媒体、新闻网站、旅游电商和旅行社应当携起手来，整合各方优势资源，形成产业合力，以新媒体手段为依托，利用新媒体、新技术的传播优势和形式丰富、互动性强、覆盖率高的优点，从旅游资讯生产模式、旅游文化传播模式、旅游信息共享和渠道拓展模式、旅游产品个性化模式、用户体验模式等全产业链条上进行协同，突破和创新，在全球旅游者和旅游业界之间架起全新的互动交流平台，形成全方位、多平台、立体化的旅游资源文化传播和体验格局。

New Media: A New Way in the Communication of Tourism Culture

Recent years have witnessed the rapid development of mobile internet and social media. Words like big data, cloud computing and the internet of things keep jumping into our eyes and they have profound implications on the way we live and work. Under the revolution of new media and as a communication based industry, the competitive landscape and the flow of values are experiencing a shift to more individualized and intelligent model with the changes in the ways of information communication.



The role of cultural communication in the shape of national image

Cultural exchange and its interaction with politics and economy consistently play an important role in the development of international communication. "Cultural exchange" is an important way for a country to gain other nations' identification and win their coordination and support. The dramatic development of contemporary communication technology and methods has surmounted the national boundary and enables the civilizations of

various nationalities and regions to integrate and exert influence on each other. Cultural exchange makes it possible for peoples and nations to have direct exchanges and enables their national cultures to develop through cultural conflict and it plays a significant role in international politics.

Smart shift in tourism triggered by new media and technology

2014 marks the 20th year since china has connected into the world internet. Over the past 20 years, the fast changing

information technology represented by the internet has been pushing forward the economic and social development in unprecedented scope and depth. Especially in recent years, the mobile internet and social media are in full swing and the new generation of technologies such as big data, cloud computing and the internet of things have far-reaching impact on people's lives and working styles. Under the revolution of new media and as a communication based industry, the competitive landscape and the flow of values are experiencing a shift to more individualized and intelligent model with the changes in the ways of information communication.

Traditional tourism industry facing new media changes

Under the context of digital media development, various nations and tourist destinations begin to attach great importance to the role of new media in tourism. Starting this year, tourism authorities of multiple countries have adopted new ways like Wechat, MicroBlog, Instagram, or working with video or social websites to the attract the attention of Chinese tourists. Meanwhile, some domestic tourist cities have launched Facebook or Twitter for overseas tourists.

Considerable changes in the way tourists obtain information and spend money

In this digital media age, there are significant changes in the way tourists get information and spend money. In the past, tourists logged on the internet to obtain information and had online booking before they set off and shared their experiences after the travel, however, nowadays thanks to the widespread use of smart phones and tablet devices, people can get any information about the destination at any time and can take several steps to book and pay for the flight, hotel rooms and admission tickets.

New media enabling new ways to showcase tourism culture

Thanks to the development of technology, products like touch screen, virtual reality and internet TV have served as the physical media to showcase the tourism culture. On one hand, they serve as a channel to present tourism culture; on the other hand, they become effective ways for tourists to be engaged in the culture.

New media help increase online trading volumes

At the same time, online order and pay of tourist products with professional information and services for tourists help form an entire tourism industry chain. According to

the forecast of World Tourism Organization, the number of international tourists in 2014 will increase by 4% or 4.5%. It's often said that cross border people to people exchange is the foundation for dialogue between countries. It's true to cities as well, and how to make those tourists become the ambassadors for promoting city culture and tourism is critical to maintaining the vitality and development of tourist cities.

China Daily's role in reshaping the new media

After three decades of development, China Daily has become an inclusive media corporation. The China Daily Website is the priority choice among other English websites for global netizens to read news about China and it has the largest group of English journalists and editors nationwide and its daily visits and independent users also top the national internet media. In recent years, its influence in terms of new mobile media in international communication has also improved and more than 3.8 million users have registered the mobile news of China Daily website in 15 languages and nearly 180 countries and regions have been covered which also lead the domestic media.

Coordination and sharing

To better cope with the revolution in tourism industry, traditional media, news websites, electronic business of tourism and travel agencies shall work together to integrate their respective advantages and form industrial synergy. We shall fully exploit the advantages of strong interaction capacity and broad coverage of new media so as to form a new platform to enable global tourists and tourism industry to interact by making new breakthroughs and innovations in terms of tourism information distribution and sharing, customized products for tourists and experience-oriented tourism.



入境旅游发展趋势

文 / 联合国世界旅游组织 (UNWTO) 旅游专家委员会委员 徐汎

入境游是一个国家旅游国际竞争力的重要体现，是旅游强国建设的重要指标。我国现在已经是全球入境旅游第三位的目的地，发展到了一个关键的时刻，既有着广阔的发展空间，也面临着呈现下降走势的问题。如果我们能找出症结所在，就可望从一个更高的层面上开始新一轮的发展，开始从世界旅游大国向世界旅游强国的新里程。



从旅游经济到访客经济

中国的入境旅游从上个世纪80年代有了一个飞速的发展，从1978年到1988年，入境游客从180万增长到3169万。上世纪90年代仍然保持着两位数的年均增长幅度。但是，进入新世纪以后，发展的速度开始放缓，尤其是近几年开始呈现下降的走势。当然，总的来说，随着市场基数的增大，市场增速放缓，是一个基本的态势。按照UNWTO的统计，中国现在已经是全球入境旅游第三位的目的地，但仍然还有发展的空间。目前这种状况，有外部的因素也有内部的因素，有长远的因素也有短期的因素，而我们能做的、可做的就是通过自身的努力来改变目前的状况。

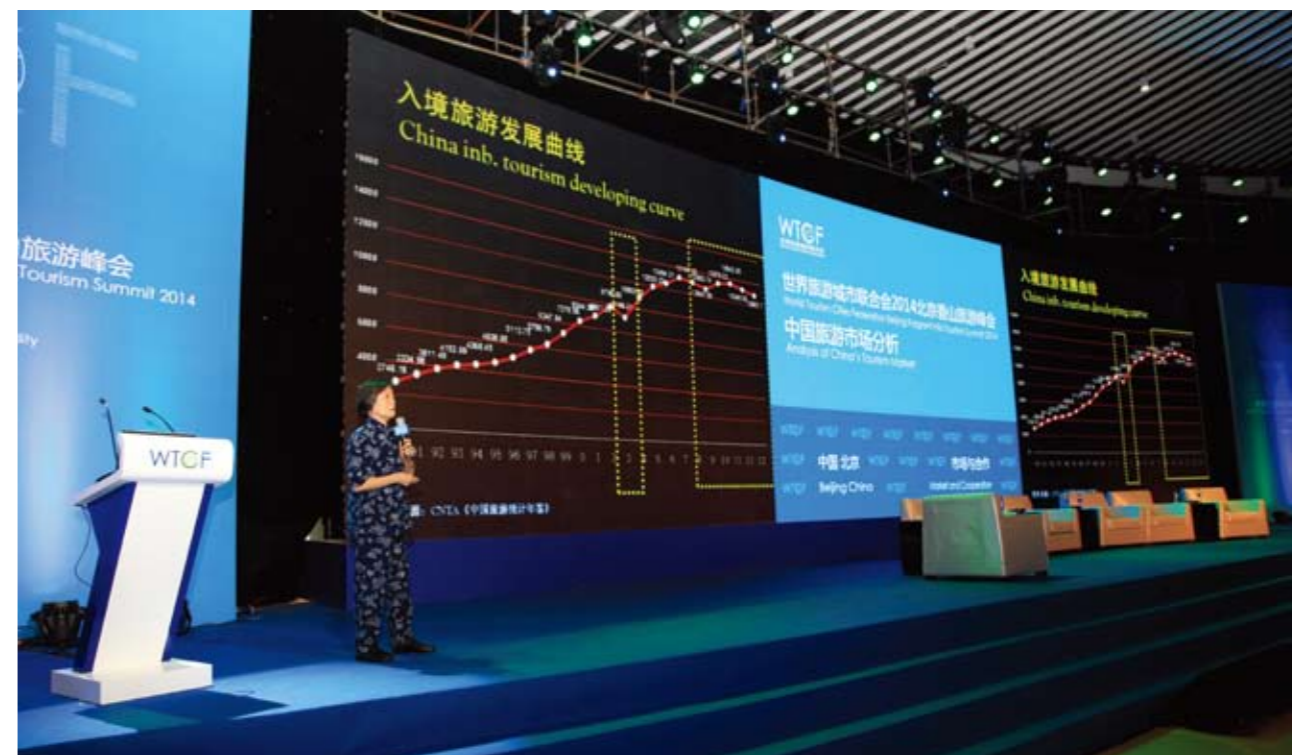
旅游经济发展到今天，已经有了更广阔的领域，从旅游经济(Tourism Economy)到访客经济(Visitor Economy)，市场更加社会化、更加宽泛化。我们所说的旅游经济，主要是观光旅游、度假旅游，当然也包括探亲访友、商务旅行。而访客经济的面更宽，商务旅行、探亲访友者、第二家园度假、康体旅游，当然也包括观光旅游、度假旅游。比较停留时间，旅游者到一个地方旅游的停留时间比较短，而作为各种目的来到这个城市的人们，停留时间可能会相对比较长；比较再放率，旅游者多是一个地方一个地方的走，再访率相对低一点，而商务旅行、

探亲访友者的再访率会比较高；比较购买方式，旅游者多为预定式的购买，而到访客的购买行为则随意性比较强，我需要去就去了；比较消费范围，旅游者到一个地方的消费，就是我们平常说的旅游的六大要素(行、游、住、食、游、购、娱)，而可能出于各种目的来到这个城市的人们，往往很快就融入到人流当中，融入整个城市的现代服务业和消费当中，所以他消费的范围比旅游消费更宽泛。从这一点来看我们熟悉的旅游市场，就会发现这个市场确实是在发生着很大的变化。

譬如体验旅游(Authentic Tourism)，英文字面是真实旅游，内涵是指体验旅游。再譬如Retail Tourism，购物旅游，为什么不是shopping。还有美食旅游，运动旅游，康体旅游，从需求到供给到整个产业的运营模式都在发生着越来越多的变化。还有一些新趋势，如祖孙一起旅游，爷爷奶奶带着孙子孙女一起去旅游，爸爸妈妈则忙于工作。还有第二家园旅游，定期到一个地方生活一段时间。这些都反映到旅游经济到访客经济转变中各个细分市场的变化。

进入体验经济的时代

我们来细看一下体验旅游。当服务经济发展到极至之后就进入了体验经济的时代。对于体验旅游者来



说，最重要的是什么？是真实，所以英文(Autheatic Tourist)直译是真实旅游。经历型旅游者的特点，他们旅游是要经历原始的，没有掺假的，没有经过中介渲染的震撼，因此真实性正在成为越来越多旅游者选择目的地时重要的甚至是首要的因素。他们会避开旅游者相对集中的地方，去那些还没有被破坏的、没有被触及的地方，他们期待新的经历，要求去掉游客的标签，别把我当游客，而是与当地人有真正的深入的接触。他们能够熟练的安排自己的旅行计划，能够预定各种服务，要求高质量的经历和服务，追求一种非物质的真实的深度的经历，比如各种各样的学习等等。他们主要是为了充实自己，丰富自己的人生经历，满足自己的心理需求。新一代旅游者的行为记忆概率是，听(譬如导游讲解)，能记住10%；看(譬如导游书、指示牌、博物馆的说明词)，能记住30%；看(视野所及看到种种)，能记住50%；做(旅游中亲身做的事情)，能记住90%。

以自己真正参与其中的经历为主的人，更要求和当地居民的一种互动。从这个角度上，旅游的主位正在发生变化。过去，旅游的主体更多是旅游者，因为旅游者花钱购买，他的游走形成客流，带动物流、信息流、资金流。今天，由于体验旅游的发展，当地的居民越来越多的进入我们旅游的范围，成为旅游的主体之一。过去，旅游者是买方，当地居民是卖方。今天，旅游者是客人，当地居民是主人。从买卖的关系到主客的关系，其中发生了很大的变化。主客互动，成为旅游的重要内容。我们再看旅游市场的主体，旅游者和当地居民应该是均衡的。我在江南的苏州古城附近很短的古老运河乘小船，没有导游，就是当地的阿婆一边摇船，一边用软软吴语唱当地的民歌，历数12个月中，一月开什么花，二月开什么花……我感觉到比导游讲解这条河的历史更有味道，更多的感受到当地的民俗、风情，一种非常贴近生活的感受。在许多旅游地，都可以看到那些退休族身上背着相机甚至长焦相机，在那里摄影、品评，这也是当地的一条风景线。在拉萨，看到藏族人民在那里默默的慢慢的非常虔诚的转经，给我们这些来自于都市的，在繁忙的世界中匆匆奔波的人带来心灵的抚慰。

我们越来越难以区别这些人是当地的居民，还是外来的游客，他是旅游的主体还是旅游的资源，我想都是。最近，有一个西安至霍尔果斯的骑自行车旅游，一队人从西安骑往霍尔果斯，到嘉峪关时，一位在上海工作的德国女教师加入车队，到乌鲁木齐，当地的市民也加入车队，车队里游客学维吾尔族语、哈萨克语，还有讲德语的，讲英

语的，我们怎么去区分这里面谁是外来游客谁是当地居民呢？从某种意义上讲，最好的境界是游客即居民，居民即游客，游客与居民和谐相处，带来一个深度体验、真实体验的社会大环境，也是旅游的大环境。

从供给管理转向需求管理

在浮躁的、匆忙的、高速旋转的社会中，人们期待着放慢速度，慢生活、慢城市、慢旅游、慢度假正在越来越多的进入更多消费者的视野。在旅游各个环节中，我们都可以做出“慢”的文章，譬如意大利人提倡6M的慢餐文化，即精致的美食(Meal)，精美的菜单(Menu)，优美的音乐(Music)，优雅的礼仪(Manner)，温馨的气氛(Mood)，愉悦的会面(Meeting)。旅途中的用餐，不仅仅是为了吃饱，而是在这个过程中深入的了解当地的饮食文化，其背后所隐含的当地的人文环境、历史因素等，达到一种人与人的交往。美食文化，也是一种修养，是走向世

界领会世界的一部分。体验型经历者要“带着灵魂去旅游”。古老的印第安民族、犹太人，在游走的过程中，走几天后会停下来，别人说你干什么呢？他会说我在等灵魂。当下的生活太快了，人们在慢旅行的过程中，找回自己的灵魂，在发现世界的过程中，找回真实的自我。我们要给大家提供的就是这种能够带着灵魂去旅游的环境。

现在，旅游者正在掌握旅游对话的大部分。现在的消费者既是旅游者也可以是写作者，是评论者，他对有兴趣的地方做记录、审视，在微博微信上传递各种各样的信息。品牌的所有权和消费者的话语权几乎相等。因此，我们已经进入了一个用户创造内容(user-generated content)的时代，这给我们的旅游企业和旅游行业带来新的挑战 and 课题。

网络世界从以计算机为基础的互联网时代发展到以移动手机为基础的移动互联网时代，即从E时代到U时代，我们又进入一个共同组织生产的时代。现在的旅游者可以

通过手机通过网络提出对旅游产品的具体需求。原来由旅游企业制造的标准化的旅游产品，诸如多少天的行程什么样的线图，不够了。消费者更多是我要这个要那个，自己拣选产品，你给我组合，给我包装。这样，消费者和供应商双向参与旅游产品的制作过程，旅游产业正在从供给管理转向需求管理。

实际上，市场是多变的，市场的变化和消费者的变化往往会超出我们的预想。在这种情况下我们要想赢得市场，最重要的是要掌握市场。从访客经济到体验经济，到消费者制造内容，到供需双方共同组织生产，在这些趋势中，我们看到了旅游主体的社会化，看到了旅游资源的社会化，也看到了旅游服务的社会化。消费者越来越多元的需求、越来越个性的需求，期待我们的旅游企业能够提供更加宽泛的、更加灵活的、更加精准的服务。从这个意义上说，我们唯有搭住市场的脉搏、把握市场的变化、适应市场的变化，才能够赢得市场。



Development Trend of Inbound Tourism

Inbound tourism is one of the important indicators of national tourism competitiveness and capacity-building efforts. China has become the third inbound tourist destination globally and has entered a critical moment and there is enormous potential as well as challenge of a downturn in development. If the market slowdown has attracted enough attention and served as an alarm for the industry, we can take a far-reaching plan to identify the problems and initiate a new-round of development of a higher level to build China into a vibrant world tourist destination.

From tourism economy to visitor economy

The tourism economy today has transformed into visitor economy with a more socialized and extensive market. The tourism economy refers to tours for sight-seeing and vacation as well as visiting families or doing business. Whereas visitor economy has a broader scope which also covers second homeland vacation tourism or health tourism. As for the time spent in a certain city, travelers tend to

spend less time in a particular destination than people who come to the city for other purposes; as for the revisiting rate, people involved in business travel or family reunion are more likely to visit the city again than ordinary tourists who travel from one spot to another; as far as purchasing habit is concerned, travelers tend to have plans about what goods to purchase, whereas people for family reunion just buy things they need; as for money-spending habits, tourists

spend money on traffic, accommodations, admission tickets, souvenirs and entertainment, however, people for other purposes are deeply involved in the city life and thus they spend money on more things. From the above perspective, the tourism market we are familiar with is evolving in a significant way.

For example authentic tourism is actually experience-based tourism. Another example is that we use retail tourism instead of shopping tourism. There are also other examples like cuisine tourism and sports tourism which demonstrate dramatic changes in the entire industrial operation model including the demand and supply chain.

Time for authentic economy

Let us take a closer look at Authentic Tourism. Authentic economy is the most developed stage of service economy. What matters most for the authentic tourism? It's authentic. The most unusual feature in experience-oriented tourism is the original and unexploited tour spot highlighted by more and more tourists. They expect to get deeply involved with local residents to have hands-on experiences not as a tourist but as a local people. They can develop their own travelling agendas and book quality services and experiences of various kinds in pursuit of impressive, genuine and non-



material feelings. Their main goal is to gain life experiences and satisfy their spiritual needs.

It makes us more and more difficult to distinguish tourists from local residents. In my view, tourists are both the subject and object of tourism. From certain perspectives, the best way for tourists to have direct and first-hand experience is to create harmony between tourists and residents.

From supply-oriented management to demand-driven management

The world of internet is evolving from computer-based network to a mobile internet age characterized by mobile phones, meaning a transformation from E time to U time. For us, we have entered an age of collective production. Nowadays, tourists can put forward specific demands for their tours by using their mobile phones, which means that the standardized products designed by the travel agencies cannot fully meet tourists' demands. Tourists prefer products specifically designed to satisfy their needs. The engagement of tourists in the development of tour products prompts a shift from supply-oriented management to demand-driven management for the tourism industry.

In fact, the market and consumers are changing all the time which are often unpredictable for us. Under such circumstances, we need to master the market in order to stand out in the competition. From visitor economy to authentic economy, then to consumer-designed content and collective production, we find out a socialized tendency of tourists and tourism materials as well as services. There are increasingly more individualized and varied demands of consumers for more extensive, flexible and adequate services by travel corporations. In this sense, we have to master and get adapted to the changes of the market so as to win.

