

中国旅游世界化

世界旅游城市联合会专家委员会主任 魏小安

全球一体化，是人类进入新世纪以来的潮流。这一潮流表现在诸多方面：

首先是世界经济的一体化，资源全面配置，生产体系已经在世界范围内布局；其次是世界贸易数量越来越大，物流四通八达；第三是金融体系深化到全球各个角落，波动也是世界性的；第四是信息的世界化，在现代技术条件下，信息的流动无远弗界，海量信息淹没世界；第五是技术的世界

化，尖端技术逐步突破，先进技术正在普及，适用技术全面推广，技术的进步改变了人类的生活面貌，也酝酿着新的革命；第六是交通的世界化，交通方式和交通格局都发生了极大的变化，距离的概念已经从空间转换为时间，地球越来越小；第七是文化的世界化，文化产品在世界范围流通，文化新品在全世界同步上市，审美口味趋同。

在这一大背景下，在一个水平分工的世界旅游经济体

系中，要客观评价中国旅游的地位，努力发挥中国在世界旅游格局中的主导性作用。目前，中国旅游和各地旅游发展都需要建立新思维、构建新平台、选择新方式、树立新心态。

从发展过程来看，我们一开始强调的是与国际接轨，其中隐含着弱势向强势学习的态度。之后是进入国际，有所提升，是非主流向主流的进入。现在则应当是融入、建构的交互作用，从而形成中国旅游的世界化。与此相对的，是世界旅游的中国化。作为世界最大的出境旅游市场，中国浩浩荡荡的人流晃晕了世界。所以现在中国菜遍布全球，中国式客房应运而生，中国客人常去商店的中国元素突出，专门对应吵吵闹闹的中国人的特定区域也划了

出来。可以说，全世界是在皱着眉头欢迎中国财神，这可能是世界旅游中国化的一个突出特点。我们应当在旅游世界化的视角之下，通过交互过程，形成多边的关系。

目前，中国已经形成了庞大的市场规模，国内旅游市场和出境旅游市场均为世界第一，入境旅游市场世界第三，对于世界旅游经济增长率的贡献达到20%以上。中国旅游从发展伊始就是同国家战略联系在一起的，现在走向世界的中国旅游业也同国家战略紧密地结合在一起。而对于国家利益的强调，则逐渐形成为国家自觉；进而扩展到对国民权利的强调，于是就形成了国民自觉；在此之后，就是文化自觉。其实我们现在对旅游的很多思考，就是大的文化自觉的组成部分。

我们需要及时树立新的目标，即中国旅游要实现世界化发展。这一新目标的内涵将集中体现在以下四个方面：第一，从世界旅游强国到世界一流的旅游目的地。这个目标就需要我们挖掘文化、发扬传统、创造极品。因为现在中国旅游发展受到环境的严重制约，要想突破，只有创造一些极致的产品，才能真正构造世界一流的旅游目的地。第二，从休闲度假产品到品牌突出的休闲度假地。中国人现在的出国还是以观光为主，但是休闲度假需求也开始逐步升温。中国的观光资源在国际上堪称一流，但中国的休闲度假资源在世界上并不具有优势。中国有16800公里的海岸线，但是真正能做滨海度假的仅有十几个地方，滨海度假资源在中国是稀缺的资源。因此，中国可以转变思路，培育一系列新的休闲度假产品（如拓展山地度假），来满足国民大众的休闲度假需求。这就需要丰富产品、创造新品、开拓新局。第三，从战略性支柱产业到综合性社会事业。中国国内旅游所追求的目标更重要的应该是怎么提高老百姓的生活质量、满足就业、扶助贫困，这是根本。未来旅游也必将更多地包容文化，将来还可以创造出更多的福利旅游产品。第四，从服从大局、服务大局，到创造大局。多年来，旅游总说要服从大局、服务大局，实际上这等于自我边缘化。我们现在融入了大局，并正在创造大局。之前在工作中就涉及到旅游的发展与国家核心利益的问题，如果旅游发展和国家核心利益能够紧密联系在一起，旅游的地位自然就在哪里。

所以，中国旅游需要重新定位、重新建立旅游发展目标体系，符合旅游性质、发挥旅游优势。旅游性质说到底就是“综合性”，认识到旅游的综合性特点才能把旅游的优势彻底发挥出来。旅游的目标可以确定为五重目标：一是经济目标，体现出创收、创利、创发展；二是社会目标，以扩大就业、提升品质为核心；三是文化目标，以弘扬传统文化、创造新兴文化为目标；四是环境目标，





以保护、提升、利用环境为重点；五是世界化目标，研究能够与世界旅游发展接轨的机制、人才和运作。此外，还需要倡导四个发展：一是柔性发展，展示中国形象、生活内容、文化内涵，进行感性交流；二是整合发展，借助资源，整合产品，促进增量，拉动存量；三是关联发展，需求支撑，市场平台，关联体系，各得其所；四是科学发展，即认识规律，把握规律，优化结构，提高水平。

中国旅游的世界行动主要应该集中体现在向世界范围内输出客源、输出资金、输出规划、输出管理等层面。一是客源的输出是持续增长的，2014年上半年，又同比增长了20%。二是旅游资本的对外输出正在展开，旅游企业通过收购、兼并、参股、直接投资等方式来投资项目，通

过上市来筹措资金，进行企业性收购与资源性收购。按照中国人出境旅游需求，形成接待体系，发展网络体系。三是中国旅游规划吸引外国专家和机构已经成为常态，一些中国专家也开始介入外国旅游规划的制定。四是管理输出开始起步，目前有两种形态，一种是借助世界上大的管理公司，中国人走出去；另一种就是中国自己的管理开始向外输出，当然一开始输出的对象还是发展中国家。五是文化输出，我们现在的文化输出还是低级形态，但也给海外的投资者提供了不少机会。

总体而言，世界旅游关注中国，中国也关注世界，我们需要构造完整的中国化旅游，进而形成深层次的合作机制，达到真正的世界化。

China Tourism Approaching to Globalization

Wei Xiaoran Head of Specialist Committee of World Tourism Cities Federation

Since the new century, global integration has become a trend which can be seen in the following aspects:

First, economic integration worldwide which features comprehensive resources allocation and the presence of production facilities all over the world; second, growing amounts of world trade volume and convenient logistics; third, financial system evolving into a global mechanism which can cause volatility everywhere; fourth, boundless information catalyzed by modern technology and the world is inundated with large amounts of information; fifth, the globalization of technology which embraces breakthrough, and the widespread use of advanced techniques has reshaped our life and facilitated new revolution; sixth, transformed transport means and landscape which redefines distance in terms of time instead of length and

the world is becoming smaller; seventh, cultural influence traveling beyond border with culture products moving around the world and simultaneously launched new works worldwide and aesthetic convergence.

Under such circumstance, it is important to have an objective evaluation of Chinese tourism position in the world tourism economy characterized by horizontal labor division system and enable China to play a leading role in the world tourism landscape. Nowadays, we need to reform our mentality, construct a new platform and select a new way in the development of Chinese tourism and local tourism industry.

In retrospect, we first stressed catching up with the world by learning from the advanced experience. Then, we focused on going abroad by making progress and entering the mainstream. Now, it's time to be part of the world and exert our influence to help Chinese tourism go global. By contrast, world tourism is becoming more Chinese. As the largest outbound tourism market, Chinese flock to every part of the world which helps spread Chinese cuisine, Chinese style hotel room and Chinese elements in stores where Chinese tourists mostly frequent and give birth to areas specifically allocated for noisy Chinese. It's fair to say that the world is frowning to welcome Chinese nouveau riche which is a salient feature in the world tourism experiencing Chinese experiment.

What we should do is to have a tourism globalization perspective and to form multilateral relationship through interaction. So far, China has a huge tourism market which contributes over 30% to the world tourism economic growth with its largest domestic and outbound tourism market, and the 3rd largest inbound tourism market. From its birth, Chinese tourism has been closely related to national strategy and it's still the case now with Chinese tourism going global. The highlight of national interest has gradually become national consciousness which evolves into people's rights



and interests becoming people's consciousness, and cultural consciousness will follow suit. As a matter of fact, most reflection we are doing now is about cultural consciousness.

We need a new vision that is to help Chinese tourism to realize global growth. This vision consists of the following four aspects: first, to become a top world tourism destination from a big tourism country. We need to explore culture and develop tradition to create high quality products. Chinese tourism development is confronted with serious environmental constraints, and only by creating something amazing can we transform China into a top world tourism destination. Second, to become a leisure destination with prominent brands instead of leisure products. Currently, most Chinese go abroad for sightseeing, however, leisure tours are becoming more popular. China boasts world renowned natural resources, yet our leisure resorts are limited. Although China has 16.8 thousand km of coastal line, only a dozen beaches can be used as holiday destinations showing a scarcity of beach resorts in China. Thus, we need to transform our ideas and foster a series of new leisure products like launching hill travels so as to meet people's

holiday needs. We need to develop more product variety and explore new areas. Third, to become a comprehensive socialist cause from a strategic pillar industry. Now, tourism shall be defined as a comprehensive socialist activity. The goal for domestic tourism shall be more placed on how to improve people's life, create employment and reduce poverty. In the future, tourism will be more cultural inclusive with more travel benefit products. Fourth, be able to make a difference instead of playing a supportive role. For years, we define tourism as a supporting force in overall development, which has in fact marginalized ourselves. Now we are part of the landscape and are making a difference in overall development. We met the issues of tourism development and national core interest in our previous work and if the two can be considered together, the role of tourism will certainly be emphasized.

Therefore, we need to redefine the position of China's tourism and rebuild the systematic goal for tourism development in consistent with our national reality. Tourism is a comprehensive industry in nature, and only by recognizing its characteristic can we fully exploit the



advantages of tourism. Its goal can be divided in five fields: first, economic targets like revenues, profits and growth; second, social targets like more jobs and higher quality; third, cultural targets such as promoting traditional culture and fostering emerging culture; fourth, environment targets with the focus on protecting, improving and utilizing the environment; fifth, world target highlighting the study on the mechanism, talents and operation in order to connect tourism with the world.

Moreover, we need to promote four ways of development: first, resilient growth by showcasing China's image, life style and cultural contents through emotional exchanges; second, integrated development by promoting product conformity and growth through mobilizing resources; third, balanced development by exploiting needs, platforms and systems to achieve comprehensive growth; fourth, scientific development by optimizing structure and making improvement through recognizing and utilizing rules.

Our vision of connecting China's tourism with the world shall focus on exporting tourists, capital, plans and

managerial resources. First, tourist growth is gaining momentum and the first half of 2014 witnessed over 20% increase year on year. Second, capital outflow is evolving, and travel agencies are making investment in programs by M&A, holding stocks and direct investment, and they raise money by going public or being engaged in enterprise or resources acquisition. Accommodations and networking for Chinese outbound travels shall be put into place. Third, foreign experts and institutions showing interest in our travel plans has become a norm, whereas some Chinese experts are also involved in the planning of foreign travels. Fourth, management starts to go aboard which takes two forms: Chinese working in multinational management companies go global; the other way is to export our managerial expertise to developing countries at first. Fifth, cultural export is limited to a lower level now, but it still presents multiple opportunities for overseas investors.

Generally speaking, world tourism highlights China and vice versa. We need to build a comprehensive Chinese tourism and foster in-depth cooperative mechanism to really go global.

中国公民出境(城市)旅游消费市场调查

世界旅游城市联合会 北京益普索IPSOS市场咨询有限公司



不断增长的中国出境旅游消费对目的地旅游发展带来了明显的拉动作用，世界更加关注中国出境旅游市场，中国公民对于目的地国家和地区的旅游品质也越来越关注。为增进世界旅游城市对中国消费者的了解，帮助会员城市和机构成员更加了解中国这一快速增长的出境客群的消费意愿和特点，世界旅游城市联合会（WTCF）特推出系列深度市场调研成果——《中国公民出境（城市）旅游消

费市场调查报告》，以帮助会员城市和机构更加深入、全面了解中国出境旅游市场的特征和发展趋势，帮助境外会员城市更好地提升旅游服务品质、开展针对性宣传推广，在搭建市场互动的桥梁上达成更多借鉴与共识。

《报告》由全球市场调研的权威机构益普索公司（Ipsos）具体实施操作。世界旅游城市联合会组织了旅游界相关专家学者、主流旅行社共同参与设置了调研方向、栏目、内容项，以一年内到访过会员城市的中国公民作为调研对象，以关注挖掘其旅游选择和决策要素、旅游满意影响因素、旅游消费行为习惯、境外旅游体验评价等为重点，形成持续性的深度调研模式和工作机制。《报告》还尝试采取了转变传统市场调研的方式，更加突出以下特点：

一是更加关注中国公民出境旅游的消费选择和体验全过程。涵盖消费者出发前往境外旅游城市前的信息渠道、客源结构，消费者在境外城市旅游时的餐饮、住宿、交通出行、游览、购物、娱乐等全过程的消费体验。同时，关注消费者在不同城市上述体验过程的差异，以及不同人群间的消费差异，以及表达了不同客群结构的诉求差异。

二是更加突出对旅游城市提供针对服务的指引力度。随着签证国别的扩宽、人民币汇率的调整及日益开放的政策，中国出境旅游消费者规模与消费能力不断扩大，消费者出境旅游关注点从过去的价格导向，逐步对目的地国家旅游服务等方面提出更加多样性和便捷化的要求。《报告》希望以会员城市为视野出发点，结合如何更有效推广城市品牌，更有效把握消费者的消费习惯设置了问卷，力求为会员城市塑造城市形象、优化旅游线路、整合营销渠道、确定发展机会、提高旅游业经济效益提供决策依据。

三是更加突出当前中国公民消费旅游的热点议题。随着





中国出境旅游消费者客群变化，更多城市的消费能力快速提高，中国出境旅游市场旅游形式的多样化，市场面临着旅游资源深化宣传推广的普及加强、旅游消费多样化引导、旅游市场规范化品牌化等公共议题。因此，《报告》将对信息不对称、文化差异、消费习惯迁移等热点议题给予关注，为旅游城市了解、理解中国消费者提供依据。

2014年6-7月，益普索通过在线访问的形式，向超过10万名最近一年有境外城市旅游经历的中国消费者发送了调访问卷，最终在众多调查信息反馈中，抽检出信息完整且符合本次调研项目要求的其中3,170份有效问卷。调研对象覆盖中国各省、直辖市和自治区，其中主要来自于华南、华北和华东区域，以上海、广东、北京等发达省市为主。

本次调研还采用了传统的做法，IPSOS派员在主要出境口岸的机场，采取向部分即将出境旅游的中国游客事先征得同意和建立联系，在其旅程结束回国后一周内再次发送问卷追踪调查的办法，获取必要的信息。

从初步统计结果来看，过去一年到访过会员城市的中国旅游消费者，体现出消费能力更强、旅游关注要素更趋细节等特点。出境旅游已成为受访消费者生活的重要组成部分，超过70%的游客每年至少安排1次境外旅游，且更趋向于在目的地城市停留更长时间，展现出更强的购物消费欲望。与此同时，消费者同样也面临着语言

障碍（73.74%）、人身财产安全（41.32%）和文化差异（40.20%）等问题，消费者迫切希望目的地城市能够开通中文官方网站（79.31%）、加强文化差异的出境前指引（41.14%）、适度增加中文导引或宣传册（53.91%）等。

《报告》从提升中国游客境外旅游满意度、提升目的地城市旅游整体形象的角度出发，建议会员城市增强中文信息的主渠道内容，参与中方展会、推介会、传统媒体，并辅助于微博、微信、印刷品、传统媒体在内的多种渠道宣传方式，以及在热门景区的机场、火车站等地发放中文旅游说明手册，注明目的地民俗、法规、紧急求助联系电话、交通工具、相关收费标准等信息，帮助中国游客更好地了解当地习俗。

“旅游让城市生活更美好”，世界旅游城市联合会希望《报告》能够帮助世界更多地了解中国旅游消费者，通过更加有效地吸引、引导消费，促进中国出境旅游市场的健康、和谐、多元发展！

这是一次希望给予城市会员和机构成员有助于参考和借鉴性的市场调研，因调研采集的数据量和面的有限，其结论和推断难免有不尽之处。若对我们的工作有任何宝贵建议，敬请联系我们。

再次对所有给予协助的各方和参与调研问卷的公众，表示最诚挚的感谢！

Market Research on Chinese Outbound Tourist (City) Consumption

World Tourism Cities Federation & Beijing Ipsos Market Consulting Co., Ltd



With booming number of Chinese outbound tourists to go abroad, and its significantly economic positive affection to the destinations, Chinese outbound tourism market becomes to a keen-on researching project to many authorities and the business related industries in the world. What are their major motivational points for making decision to travel? What are their major concerning persecutions or expectations for the travel? What are their customer

behaviors and benefits they are looking for? What are the changes of their consumption behaviors? How to play a better promotion to approach the selective results? What are the most effective elements to affect the travel consumptions in the different generating regions in China? What are the definitions of Chinese tourism market segment? What are best selected programs and the satisfied service to attract the Chinese market? ... May all these questions are raised to

many people including the tourism industry itself.

It is WTCF service to help the members to better understanding the Chinese market and performing a good practical result. WTCF has begun to commit the series of intensive market researches and worked out this research report by July 2014 with Beijing Ipsos Market Consulting Co., Ltd. We hope the report of "Market Research on Chinese Outbound Tourist (City) Consumption" may help the members the references for a better figuring out the Chinese outbound market.

The research was conducted by Ipsos, the 3rd largest research company in the world and the biggest professional research company in China. Under WTCF overall guidelines and the proposals of practical items, Ipsos worked together with Chinese experts, scholars and travel operators for setting up the procedures, the investigation subjects, and estimation selections. The objective respondents are Chinese citizens who have visited WTCF membership cities within one year in the past only. The overall of 30 questions,

each with multiple choices covers almost all the inclusive basic items that the regular market research should be contented. The report tried to be a key driver by its almost all possibilities to digitally figure out the features behind the unexplored information.

Each investigation covered the whole customer travel consumption process, from the very beginning of purchasing tour decision, selection of destinations and products, way of payment or credit, providing their personal information and visa application, until their ending tour by return back with satisfaction, experience recommendation, and their next trips planning or suggestions. As the basic terms and conditions, the valuable research was only qualified by the investigation forms which were fully itemed by the respondents. Structurally, the analysis also covers almost all fields, including tour programs, transfers service and public transportation facilities, dining and cuisine flavors, accommodations and convenience, guide service and knowledge, sightseeing highlights, entertainments and amusements, shopping and souvenirs, branding malls,

outlets or DFS, life memorable commodities, exciting adventures, safety and securities issues. The analysis was also indicated their selected travel destination composed with the customer identification of their ages, sex, matrimony, occupation, education, residential regions, and level of annual incomes. We hope that the report is able for our members to be more familiar with the Chinese outbound market or adjust their market targets,

The research was attention to the customer satisfaction of their average shopping consumption, the volume of their expenditure on their trip except the package tour cost, the optional tours of the extra cost at the destinations. The research also investigated the medias, internet, WeChat functional roles on their consumption. The analysis tried to indicate the functional result of RMB exchange rate and foreign currency depreciation in the customer's behavior. Meanwhile, with the investigation, we found out that Chinese outbound market became more diversified. The customers are requesting for imaginable, reliable, detail sightseeing information. UNESCO, natural scenery, environment beauties, health activities, educational resources, cultural activities, related history with China, wonders of architectures and monumental, the artificial exhibitions are becoming more attractive acquirement for their tour programs to Chinese market.

Ipsos conducted a nationwide survey in full of June and July by delivery of the questionnaire forms among over 100,000 Chinese outbound tour customers, and selected 3170 full valid respondent reports for the further analysis. The survey covered the major gateway markets in Beijing, Shanghai, Guangdong, Sichuan and their surrounding provincial areas. The customer resources are mainly from some major tour operator's online business operation system. Ipsos also implicated a fieldwork among Chinese tourists at the departure terminals of the airport prior their departure for the preliminary personal connection. With that kind of connection channels, IPOs directly handled its own solid investigation and information.



According to the initial statistics of the analysis, the feature shows us that outbound travel has become an essential part of the lifestyle for those Chinese tourists who have visited membership cities abroad within one year in the past. Over 70% of the respondents have arranged at least one outbound trip annually. These people became to prefer staying longer in their loved destination for leisure and in-depth cultural exploration, or hoped to frequently visit major parts of the world. It manifested that the Chinese outbound market would continually release its stronger energy and desires. Meanwhile, the existed problems are still major concerns of tourists, including language barriers (73.74%), personal and property safety (41.32%) and cultural differences (40.20%). The major respondents (79.31%) expected the industry able to build up some major channels with more detail and highly qualified information for their visit. The suggestion of providing more detail and professional guidebooks in bilingual of Chinese and destination language has reached to a higher requirement (53.91%). The necessary awareness on the cultural difference has been raised to (41.14%). The report also indicated that the customers had turned their interesting to participation of the travelmart, travel shows and exhibitions. The special promotion with the price deduction based on the cooperation between the destination authorities and tour operators were their enjoyable flavors. The brochures in brief introduction or simple forms were not their prefer printing materials.

The report is prospected to providing a perfect reference in an exclusive way to the travel industry. In spite of some uncontrollable conditions and limited volume of respondents, limitation of our knowledge and capability, some of solution may appear to some different results from our expectation. But it real comes out by all the date base of all the solid feedbacks by the questionnaire. We cherish and deeply appreciate any readers who are able to give us any query or suggestion for our further study. Last but not the least, we would like to express our sincerely thanks to all respondents, cooperative tour operators and institutional partners who tried their best to help us in this research!

