



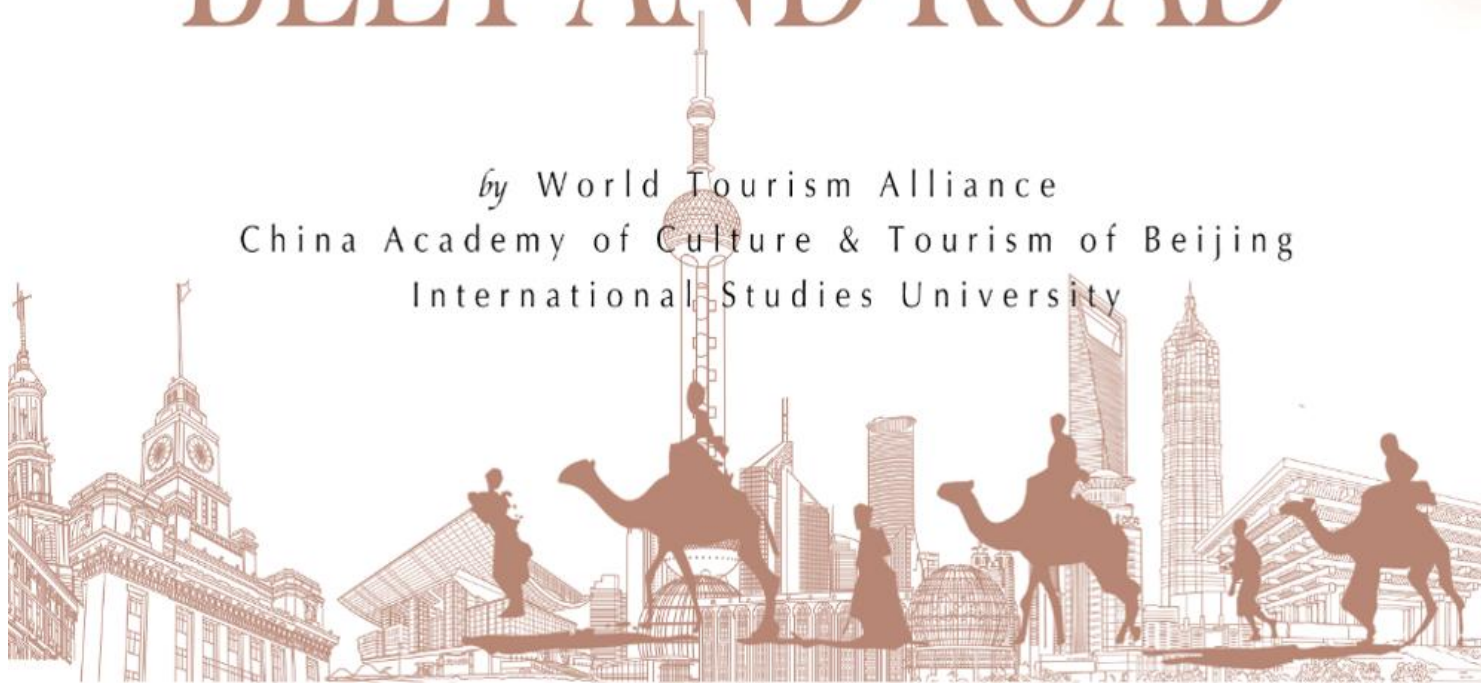
“一带一路” 旅游合作发展报告

世界旅游联盟

北京第二外国语学院中国文化和旅游产业研究院

REPORT ON DEVELOPMENT OF TOURISM COOPERATION ALONG BELT AND ROAD

by World Tourism Alliance
China Academy of Culture & Tourism of Beijing
International Studies University



序

中国提出“一带一路”倡议提出后，中国政府与“一带一路”沿线国家旅游合作更加务实与深入，在联合营销、签证简化、旅游投资、产品开发、人才培养与旅游安全等方面合作取得了丰硕成果。

在营销合作上，先后举办了中国－中东欧、中国－东盟、中国－欧盟等10余个文化年、旅游年；积极创办丝绸之路旅游市场推广联盟、海上丝绸之路旅游推广联盟、“万里茶道”国际旅游联盟等旅游合作机制。举办中国—东盟博览会旅游展、北京国际旅游商品及装备博览会、宁夏中国—阿拉伯国家旅行商大会等。

在产品开发合作上，每年开展“一带一路”文化产业和旅游产业国际合作重点项目。联合开发丝绸之路遗产廊道旅游、大湄公河流域旅游、图们江流域旅游等，联合打造草原丝绸之路、佛教丝绸之路、沙漠丝绸之路、香料之路、茶马古道、琥珀之路等。配合2022北京冬奥会，共建冰雪丝路，积极建设东北、北京和张家口、新疆维吾尔自治区等冰雪旅游核心区，冰雪旅游合作逐步延伸至丝绸之路经济带沿线国家及世界重点冰雪国家和地区。

在旅游投资合作上，“陆上丝绸之路”沿线国家的投资增速提升，投资领域从传统旅游业态（酒店、地产、餐饮、免税店）向新业态（数字文旅、主题休闲、旅游演艺、文化装备）转变，非典型旅游企业和民营企业投资占比提升，非股权投资明显增加，轻资产化倾向凸显。

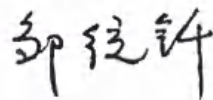
在合作机制上与旅游便利化方面，中国提出“一带一路”倡议之后，先后推动建立中国－东盟、中国－中东欧、中俄蒙等一系列文化旅游合作机制，先后成立中国驻曼谷、布达佩斯、阿斯塔纳旅游办事处，指导完成巴黎、悉尼中国旅游体验中心建设。与57个沿线国家缔结了涵盖不同护照种类的互免签证协定，与

15 个国家达成 19 份简化签证手续的协定或安排。

2020 年始，“一带一路”倡议面对新冠肺炎疫情冲击带来的挑战，一方面各国关闭国门，一方面限制流动，熔断航班，导致国际旅游下降 74%！疫情之下，中国和“一带一路”沿线国家加强在疫情防控、疫苗研发生产等方面的合作。同时改变旅游合作交流方式，大量的在线交流、云展览、在线培训等蓬勃开展。中国文化和旅游部支持中国对外文化集团有限公司、中国文化旅游行业协会等联合举办“丝路数字文旅产业合作论坛”“中国数字文旅产业项目推介会”及“中国数字文旅产品技术展”，推动数字“一带一路”旅游合作。

2021 年中国公布了《“十四五”“一带一路”文化和旅游发展行动计划》，聚焦“健全合作机制和交流平台，全面提升品牌建设水平”“推动‘一带一路’文化和旅游发展，构建全方位发展新格局”“推动区域协同发展，实现对外交流上台阶”等三大任务，具体包括：“一带一路”文化和旅游交流合作务实推进、平台巩固计划、品牌提升、丝路艺术精品创作、文物国际合作、公共文化服务提升、产业促进、旅游体系建设提升、科技成果推广、非遗合作、市场监管合作、区域发展重点推出计划等 12 项专项计划，强力保障了“十四五”期间“一带一路”旅游合作。

本报告为世界旅游联盟倡导，北京第二外国语学院中国文化和旅游产业研究院组织撰写。旨在总结近年来“一带一路”旅游合作的发展过程与未来发展趋势，希望为“一带一路”沿线国家旅游合作提供参考，由于资料有限，报告难免挂一漏万，诚请大家批评指正。



北京第二外国语学院
丝绸之路国际旅游大学

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第一章 “一带一路”旅游合作政策

吴丽云 阎芷歆

一、中国“一带一路”旅游政策现状与特点

“一带一路”是由习近平主席于2013年9月和10月分别提出的建设“丝绸之路经济带”和“21世纪海上丝绸之路”的合作倡议。2013年11月召开的十八届三中全会将“一带一路”上升为国家战略。此后，“一带一路”相关政策文件开始频繁出台，尤其在2014年之后，随着顶层设计的完成，不论是全国还是地方，政策文件在数量上、内容上和可操作性上都取得了巨大的发展与提升。

1、从顶层设计到具体实施不断完善

作为推动“一带一路”合作的重要途径，2014年8月国务院发布的《关于促进旅游业改革发展的若干意见》中就提到了要加强与“一带一路”国家间的旅游合作。2014年12月，中共中央办公厅、国务院印发了《丝绸之路经济带和21世纪海上丝绸之路建设战略规划》，实现了“一带一路”从战略到政策落地的转变，但该规划为政府内部规划，尚未对外公开。2015年3月，《推动共建丝绸之路经济带和21世纪海上丝绸之路的愿景与行动》的发布，标志着“一带一路”顶层设计的基本完成。其中涉及旅游的内容涵盖了旅游合作、旅游推广、旅游线路、旅游产品、旅游签证、邮轮旅游等多方面。同年8月，国务院发布的《关于进一步促进旅游投资和消费的若干意见》，为“一带一路”沿线地区旅游基础设施和服务设施的建设与完善提供了资金支持。此后发布的《标准联通“一带一路”行

行动计划（2015—2017）》、《“一带一路”文化发展行动计划（2016—2020年）》、《关于推进绿色“一带一路”建设的指导意见》为“一带一路”政策下旅游业的发展提供了指导和保障。此外，在中国的《“十三五”旅游业发展规划》和《“十四五”文化和旅游发展规划》中也都提到了要加强“一带一路”旅游合作，通过举办节庆活动、出台互惠政策、鼓励旅游投资等方式提高文旅品牌影响力。2017年5月，推进“一带一路”建设工作领导小组办公室发布《共建“一带一路”：理念、实践与中国的贡献》，总结了中国与沿线国家在旅游推广和交流方面取得的成就。

2017年6月发布的《“一带一路”体育旅游发展行动方案》成为中国第一部专门性的“一带一路”旅游发展政策，其明确了支撑体育旅游的八项行动，为促进旅游产业的发展提供了具体实施方案，具有重要的指导意义。2019年4月，推进“一带一路”建设工作领导小组办公室发布《共建“一带一路”倡议：进展、贡献与展望》报告，对中国与其他一带一路沿线国家旅游的合作提出希冀。目前，《文化和旅游部“一带一路”文化和旅游发展行动计划（2021—2025年）》正在紧张的编制中，“一带一路”旅游政策将更加聚焦具体领域，涉及行业更加全面，政策内容更加具体。

表 1-1 中国“一带一路”旅游相关政策

发布时间	发布部门	政策文件	旅游相关内容
2014-08	国务院	《关于促进旅游业改革发展的若干意见》	围绕丝绸之路经济带和 21 世纪海上丝绸之路建设，在东盟—湄公河流域开发合作、大湄公河次区域经济合作、中亚区域经济合作、图们江地区开发合作以及孟中印缅经济走廊、中巴经济走廊等区域次区域合作机制框架下，采取有利于边境旅游的出入境政策，推动中国同东南亚、南亚、中亚、东北亚、中东欧的区域旅游合作。积极推动中非旅游合作。加强旅游双边合作，办好与相关国家的旅游年活动。

接上表

2014-12	中共中央办公厅 国务院	《丝绸之路经济带和21世纪海上丝绸之路建设战略规划》	尚未对外公开
2015-03	发展改革委 外交部 商务部	《推动共建丝绸之路经济带和21世纪海上丝绸之路的愿景与行动》	加强旅游合作，扩大旅游规模，互办旅游推广周、宣传月等活动，联合打造具有丝绸之路特色的国际精品旅游线路和旅游产品，提高沿线各国游客签证便利化水平。推动21世纪海上丝绸之路邮轮旅游合作。积极开展体育交流活动，支持沿线国家申办重大国际体育赛事。
2015-08	国务院	《关于进一步促进旅游投资和消费的若干意见》	各级人民政府要加大对国家重点旅游景区、“一带一路”及长江经济带等重点旅游线路、集中连片特困地区生态旅游开发和乡村旅游扶贫村等旅游基础设施和公共服务设施的支持力度。让多彩的旅游丰富群众生活，助力经济发展。
2015-10	推进“一带一路”建设工作领导小组办公室	《标准联通“一带一路”行动计划（2015-2017）》	支持各地发挥地缘优势、语言文化和特色产业优势，全方位开展特色标准化合作。
2016-12	国务院	《“十三五”旅游业发展规划》	推动建立“一带一路”沿线国家和地区旅游部长会议机制。建立丝绸之路经济带城市旅游合作机制。推动“一带一路”沿线国家签证便利化，推动航权开放、证照互认、车辆救援、旅游保险等合作。加强与沿线国家旅游投资互惠合作，推动海上丝绸之路邮轮旅游合作，联合打造国际旅游精品线路，提升“一带一路”旅游品牌的知名度和影响力。
2016-12	文化部	《文化部“一带一路”文化发展行动计划（2016—2020年）》	以“政府主导，开放包容；交融互鉴，创新发展；市场引导，互利共赢”为基本原则，重点是健全“一带一路”文化交流合作机制、完善“一带一路”

接上表

			文化交流合作平台、打造“一带一路”文化交流品牌、推动“一带一路”文化产业繁荣发展、促进“一带一路”文化贸易合作。
2017-05	环境保护部 外交部 发展改革委 商务部	《关于推进绿色“一带一路”建设的指导意见》	根据生态文明建设、绿色发展和沿线国家可持续发展要求，构建互利合作网络、新型合作模式、多元合作平台，力争用3-5年时间，建成务实高效的生态环保合作交流体系、支撑与服务平台和产业技术合作基地，制定落实一系列生态环境风险防范政策和措施，为绿色“一带一路”建设打好坚实基础；用5-10年时间，建成较为完善的生态环保服务、支撑、保障体系，实施一批重要生态环保项目，并取得良好效果。
2017-05	推进“一带一路”建设工作领导小组办公室	《共建“一带一路”：理念、实践与中国的贡献》	中国与“一带一路”沿线国家互办“旅游年”，开展各类旅游推广与交流活动，相互扩大旅游合作规模。举办世界旅游发展大会、丝绸之路旅游部长会议、中国－南亚国家旅游部长会议、中俄蒙旅游部长会议、中国－东盟旅游部门高官会等对话合作，初步形成了覆盖多层次、多区域的“一带一路”旅游合作机制。中国连续三年举办“丝绸之路旅游年”，建立丝绸之路(中国)旅游市场推广联盟、海上丝绸之路旅游推广联盟、中俄蒙“茶叶之路”旅游联盟，促进旅游品牌提升。体育合作也在蓬勃发展。
2017-06	国家体育总局 国家旅游局	《“一带一路”体育旅游发展行动方案》	包括加大体育旅游宣传力度、培育体育旅游重点项目、加强体育旅游设施建设、促进体育旅游装备制造、推动体育旅游典型示范、发展体育旅游目的地、打造体育旅游合作平台、强化体育旅游智力支撑八项行动。

接上表

2019-04	推进“一带一路” 建设工作领导小组办公室	《共建“一带一路” 倡议：进展、贡献与 展望》	展望：旅游合作逐步扩大。中国与 多个国家共同举办旅游年，创办丝绸之 路旅游市场推广联盟、海上丝绸之路旅 游推广联盟、“万里茶道”国际旅游联 盟等旅游合作机制。与 57 个沿线国家缔 结了涵盖不同护照种类的互免签证协定， 与 15 个国家达成 19 份简化签证手续的 协定或安排。
尚未发布	文化和旅游部	《文化和旅游部“一 带一路”文化和旅 游发展行动计划（2021— 2025 年）》	正在编制中
2021-04	文化和旅游部	《“十四五”文化 和旅游发展规划》	持续建设“一带一路”国际剧院联盟、 博物馆联盟、艺术节联盟、图书馆联盟、 美术馆联盟，办好丝绸之路国际艺术节、 海上丝绸之路国际艺术节、丝绸之路（敦 煌）国际文化博览会和敦煌行·丝绸之 路国际旅游节等主题节会，提升“丝绸 之路文化之旅”品牌影响力。

资料来源：作者整理

2、各地积极出台“一带一路”发展政策

随着“一带一路”在国家层面政策的落地和顶层设计的完成，在地方层面，各地政府纷纷开始出台参与丝绸之路经济带和 21 世纪海上丝绸之路建设的实施方案，天津、山东、山西、河南、江西、云南、广东、广西、甘肃、青海、新疆等省（区、市）均出台了“一带一路”相关促进政策（表 1-2）。这些政策中与旅游相关的内容多是结合了当地的资源特色和地域优势，从旅游合作出发，在基础设施建设、旅游品牌打造、旅游产品开发、会展活动举办、旅游投资等多方面提供政策指导。其中，山东济南、山西晋城、山西运城市、河南南阳等地从市级层面提出了参与“一带一路”建设的实施方案，进一步细化了省级政策的内容，并将工作落实到具体部门。此后，许多地区开始探索编制“一带一路”具体规划

以及发布年度工作要点和工作计划，旨在形成操作性强的指导方案。例如陕西省自 2015 年起，每年都会出台当年的《“一带一路”建设行动计划》，围绕当年的建设需要，对重点方向、重点地区、重点国别、重点项目进行规划，着力构建国际文化旅游中心。“一带一路”相关政策在各地的推进，为各地国际旅游业的发展提供了新的机遇。

表 1-2 中国各省“一带一路”旅游相关政策

发布时间	发布部门	政策文件	旅游相关内容
2015	山西省人民政府	《山西省参与建设丝绸之路经济带和 21 世纪海上丝绸之路实施方案》	完善“四网”立体平台、开放功能平台、经贸合作平台、多元主体平台等 4 大合作平台，创新合作机制，强化财政、金融、保险、人才政策保障，重点推进经贸合作、对外投资、产业合作、人文交流。
2015	河南省发展改革委员会	《河南省参与建设丝绸之路经济带和 21 世纪海上丝绸之路实施方案》	积极推进与沿线国家的旅游合作，将我省建设成为具有较高知名度的国际旅游目的地和客源地。突出“古丝绸之路”主题，重点打造洛阳龙门石窟、登封“天地之中”历史建筑群、安阳殷墟、汉魏故城、隋唐洛阳城、新安汉函谷关、陕县崤函古道等黄金旅游点，与沿线省份共同建设丝绸之路文化旅游产业带。整合旅游资源和品牌，积极策划开发丝绸之路自驾游、丝绸之路文化寻根探秘之旅、中国功夫研修之旅、茶文化休闲之旅等一批独具特色的系列旅游产品。
2015	江西省人民政府	《江西省参与丝绸之路经济带和 21 世纪海上丝绸之路建设实施方案》	打造国际生态旅游目的地。大力实施旅游强省战略，加强景德镇、庐山、三清山、龙虎山、井冈山、婺源等著名旅游景区建设，打造国际生态旅游目的地。加强与沿线国家旅游宣传推广合作，

接上表

			<p>互办旅游推广周、宣传月等活动，积极参与国际性、区域性旅游展会，大力推介“江西风景独好”旅游品牌，提升江西旅游国际知名度。联合国内相关省份推出一批具有丝绸之路概念的特色旅游线路，吸引“一带一路”区域旅游客源。大力开拓泰国、越南、新加坡、俄罗斯等旅游市场。开辟与沿线国家的旅游直飞航线，支持开通旅游包机，促进国际旅游市场发展。</p>
2015	广西壮族自治区人民政府	《广西参与建设丝绸之路经济带和 21 世纪海上丝绸之路实施方案》	<p>推进共建中国—东盟联合大学、中国—东盟医疗保健合作中心、中国—东盟传统医药交流合作中心、中国—东盟技术转移中心、中国—东盟减贫中心等重大项目（事项），深化教育、医疗卫生、文化体育、科技、旅游、友城等领域合作，夯实民心基础。</p>
2015	广东省发展改革委员会	《广东省参与丝绸之路经济带和 21 世纪海上丝绸之路建设实施方案》	<p>积极与沿线国家签订旅游合作框架协议、旅游合作备忘录等整体性协议，深化旅游业规划和资源开放、行业监管、公共服务等领域的国际合作。促进更多的广东游客到沿线国家旅游观光，支持广东企业到沿线国家开展旅游投资合作，建设旅游酒店、旅游景区及旅游基础设施。与沿线国家华人商（协）会、大型旅行企业合作，开设广东驻海外旅游合作推广中心。在广州、深圳市建设国际邮轮母港，在珠海、汕头、湛江等市启动邮轮旅游开发。筹划一批跨境丝绸之路主题旅游项目。</p>

接上表

2015	甘肃省人民政府	《甘肃省参与丝绸之路经济带和 21 世纪海上丝绸之路建设的实施方案》	进一步统筹国际国内合作,把甘肃打造成为中国向西开放重要门户和次区域合作战略基地,期望到 21 世纪中叶实现五通目标,将甘肃打造成为“一带一路”国际经济贸易文化合作黄金走廊。
2015	云南省人民政府	《云南省参与建设丝绸之路经济带和 21 世纪海上丝绸之路实施方案》	尚未对外公布
2016	天津市人民政府	《天津市参与丝绸之路经济带和 21 世纪海上丝绸之路建设实施方案》	推进基础设施互联互通、打造经贸合作升级版、推动产业与技术合作、提升金融开放水平、推动海上全面合作、密切人文交流合作。
2016	山东省人民政府	《山东省参与建设丝绸之路经济带和 21 世纪海上丝绸之路实施方案》	基于山东丰富的历史文化和旅游资源,着力搭建高端文化交流平台,推广“好客山东”旅游品牌,以创新思维讲好“山东故事”,推动曲阜中华优秀传统文化传承发展示范区上升为国家战略,促进齐鲁文化国际化,加快形成国际文化合作交流中心、国际休闲度假中心和世界知名旅游目的地。
2016	新疆生产建设兵团发展和改革委员会	《新疆生产建设兵团参与建设丝绸之路经济带的实施方案》	促进基础设施互联互通、打造八大进出口产业基地、打造经贸合作平台、实施走出去战略、完善城镇嵌入式布局、密切人文交流、提升医疗服务水平、增强金融支撑能力、当好生态卫士及构建开放型经济体制机制。

接上表

2016	陕西省人民政府	《陕西省推进建设丝绸之路经济带和 21 世纪海上丝绸之路实施方案(2015-2020 年)》	以“商贸物流、产能合作、科技教育、国际旅游、区域金融中心”为建设任务,大力发展旅游、文化、中医药服务等重点领域的服务贸易,不断提高服务贸易比重。
2015	青海省人民政府	《青海省参与建设丝绸之路经济带和 21 世纪海上丝绸之路实施方案》	尚未对外公布

3、文体旅多业融合成风潮

中国“一带一路”政策中的旅游相关政策,虽经常与文化和体育相关政策同类而聚,但三类政策最初通常相互独立、互为补充,随着时间的推移,产业融合类政策频繁出现。2017 年发布的《“一带一路”体育旅游发展行动方案》是旅游和体育业态融合的第一次有效尝试,该方案旨在“一带一路”相关区域形成一批精品体育旅游赛事、特色运动休闲项目、有竞争力的体育旅游企业和知名体育旅游目的地,并通过体育旅游全方位的交流互动,促进“一带一路”区域内的政策沟通、产业互通和民心相通,使体育旅游成为“一带一路”区域内开放合作的亮点。自 2018 年文化和旅游部机构重组以来,文旅融合更加紧密,从 2019 年起,文化和旅游部每年都会颁布《文化和旅游部办公厅关于征集“一带一路”文化产业和旅游产业国际合作重点项目的通知》,促进重点项目的落地,推动“一带一路”文化和旅游的产业实践。而目前正在编制的《文化和旅游部“一带一路”文化和旅游发展行动计划(2021—2025 年)》则是旅游与文化相融合在政策方面的有效尝试,该政策的出台必将对中国“一带一路”沿线旅游业的发展起到重要指导作用。

二、“一带一路”合作文件中的旅游政策

自“一带一路”倡议提出以来，中国同沿线各国积极寻求合作，以政策沟通、设施联通、贸易畅通、资金融通、民心相通为重点，将“一带一路”从理念转化为行动，从愿景转化为现实，从倡议转化为全球广受欢迎的公共产品。《共建“一带一路”倡议 进展、贡献与展望》中提出，截至2020年11月，中国政府已与138个国家、31个国际组织签署了201份合作文件，共建“一带一路”国家已由亚欧延伸至非洲、拉美、南太等区域。大量合作文件的签署，为中国旅游产业的发展提供了有效的保障，其中与旅游相关的支持政策也呈现出了一些新特点。

本报告选取了中华人民共和国国务院新闻办公室官方网站“一带一路”合作文件专栏中的79个包含旅游相关政策的合作文件,并提取其中关键词进行分析(图1-1)。其中“旅游年”作为一种文旅交流的有效形式,出现在了15份文件中,成为中国“一带一路”对外旅游合作的重要路径。与此同时,鼓励游客互访、加强旅游投资、完善基础设施建设、培养旅游人才、增开航线、简化旅行手续等也是旅游相关政策中的常用手段。



图 1-1 “一带一路”合作文件旅游相关政策关键词

资料来源：作者整理

1、旅游投资政策不断深化

中国对“一带一路”沿线国家的旅游投资是中国旅游企业打开全球市场的重要手段，也是中国加强国际旅游交流和对外开放政策的重要组成部分。旅游投资政策呈现出投资力度加强、投资模式多样、投资区域扩大等特征，涉及服务平台建设、数字文旅、创意设计、旅游演艺等多个领域。2020年中国对“一带一路”沿线国家非金融类直接投资177.9亿美元，增长18.3%，占全国对外投资的比重上升到16.2%，在沿线国家承包工程完成营业额911.2亿美元，占全国对外承包工程的58.4%^①。同时，沿线国家企业也看好中国发展机遇，在华新设企业4294家，直接投资82.7亿美元。

2、旅游基建政策卓有成效

基础设施互联互通是实施“一带一路”倡议的先导，旅游基础设施的完善是国际间旅游合作的基础，也是实现旅游高质量发展的重要条件。在合作文件中，“旅游基础设施”被多次提及，主要表现在加强旅游基础设施建设、优化基础设施、鼓励旅游基础设施投资和发展数字化旅游基础设施等方面。在政策的引领下，2013年至2017年，中国企业在“一带一路”沿线国家新签对外承包工程合同额累计3629.9亿美元，完成营业额累计2307.6亿美元，分别占同期总额的50.5%和47.9%^②。在旅游交通基础设施方面，中国参与建设科摩罗莫罗尼国际机场、安哥拉新罗安达国际机场、尼泊尔博卡拉新机场和巴基斯坦瓜达尔新国际机场等重要项目，有效提升了沿线国家的基建水平。

3、旅游推广政策丰富多样

旅游推广是旅游合作的重要组成部分，也是加强旅游交流的有效推力。在合作文件中，不仅有推动旅游团队互访这类常规型手段，也有以“旅游年”为代表的新型推广手段，利用丰富多样的文旅交流活动，打造旅游品牌，推广旅游产品。

① 中国一带一路网. 2020年中国对“一带一路”沿线非金融类直接投资同比增长18.3%[EB/OL]. (2021-01-22) [2021-07-17]. https://m.thepaper.cn/newsDetail_forward_10902912.

② 商务部对外投资和经济合作司. 中国企业拿下半数“一带一路”沿线国家新签对外承包工程合同[EB/OL]. (2018-06-08)[2021-07-17]. <http://fec.mofcom.gov.cn/article/fwydy/zgzx/201806/20180602753596.shtml>.

2013年以来,中国与欧盟、东盟、中东欧、哈萨克斯坦、澳大利亚、克罗地亚等多个沿线国家和地区互办旅游年,并先后成立中国驻曼谷、布达佩斯、阿斯塔纳旅游办事处,指导完成巴黎、悉尼中国旅游体验中心建设,还举办了丝绸之路(敦煌)国际文化博览会暨敦煌行·丝绸之路国际旅游节、丝绸之路国际旅游博览会、海上丝绸之路国际旅游节等以“一带一路”为主题的综合性旅游节会。成功打造了“丝路之旅”、“欢乐春节”、“中非文化聚焦”、“美丽中国”等文化和旅游品牌。

4、旅游便利化政策持续推进

旅游便利化能够提高旅游效率、促进旅游流动。合作文件中的旅游便利化政策主要涉及两个方面:签证便利化政策和交通便利化政策。在签证便利化政策方面,不少国家向中国抛出了“橄榄枝”。根据2019年4月中国经济信息社与携程旅行网联合编制发布的《2018“一带一路”旅游大数据报告》显示,截至2019年4月1日,已经有51个共建“一带一路”国家面向中国游客开放便利签证政策。有11个国家与中国互免普通护照签证,其中波黑的免签条件为入境、出境或过境每180天停留不超过90天;厄瓜多尔的免签条件为入境、出境或过境一年内累计停留不超过90天,其余九个国家的免签条件皆是入境、出境或过境停留时间不超过30天。另外有7个国家单方面允许中国公民免签入境,33个国家对中国游客实施落地签证政策(表1-3)。

表 1-3 “一带一路”国家或地区签证政策情况

签证政策	互免普通护照签证(11个)	单方面允许中国公民免签入境(7个)	单方面允许中国公民办理落地签证(33个)
“一带一路”国家或地区	阿联酋、巴巴多斯、裴济、格林纳达、塞舌尔、汤加、塞尔维亚、波黑、白俄罗斯、厄瓜多尔、卡塔尔	印度尼西亚、韩国(济州岛等地区)、突尼斯、摩洛哥、萨摩亚、安提瓜和巴布达、多米尼克	泰国、印度尼西亚、越南、缅甸、老挝、柬埔寨、马尔代夫、孟加拉国、文莱、尼泊尔、埃及、斯里兰卡、东帝汶、黎巴嫩、马达加斯加、土库曼斯坦、巴林、瓦努阿图、阿塞拜疆、伊朗、

			约旦、亚美尼亚、坦桑尼亚、津巴布韦、多哥、佛得角、加蓬、圭亚那、科特迪瓦、卢旺达、乌干达、毛里坦尼亚、苏里南
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资料来源：上海出入境边防检查总站

随着对外开放与国际合作的不断深入，中国也在积极推动便利的过境免签政策，截至2019年12月1日，全国共有18个省（区、市）23个城市的30个口岸对53个国家（包含25个“一带一路”国家）人员实施过境144小时、72小时免办签证政策（表1-4）。免签、落地签等政策利好，直接促进了国际间的人员流动，是推动“一带一路”沿线国家旅游快速发展的强大助力。

表 1-4 外国人过境免签政策情况

签证政策	外国人过境 144 小时免办签证（23 个）	外国人过境 72 小时免办签证（3 个）
城市	北京、天津、石家庄、秦皇岛、上海、杭州、南京、沈阳、大连、青岛、成都、厦门、昆明、武汉、广州、深圳、揭阳、重庆、西安、宁波	长沙、桂林、哈尔滨
惠及的“一带一路”国家或地区（25 个）		
捷克、爱沙尼亚、希腊、匈牙利、拉脱维亚、立陶宛、波兰、斯洛伐克、斯洛文尼亚、俄罗斯、塞浦路斯、保加利亚、罗马尼亚、乌克兰、塞尔维亚、克罗地亚、波黑、黑山、马其顿、阿尔巴尼亚、白俄罗斯、新加坡、文莱、阿联酋、卡塔尔		

资料来源：国家移民管理局

在交通便利化政策方面，中国旨在与“一带一路”沿线各国构建全方位、多层次、复合型的互联互通网络，实现各国多元、自主、平衡、可持续发展。具

体政策表现在增加航线、开通直航、加强海运、陆运等方面。2019年4月，中国与东盟签订首个区域性航空运输协定，为打造“空中丝路”创造了航权条件，至此中国与沿线国家签订的道路运输便利化协定总数达18个，签订的海运协定达39个，与沿线62个国家签订了双边政府间航空运输协定，并与45个沿线国家实现直航，通航能力覆盖中国83.87%的省份，中欧班列累计开行突破1.4万列，到达欧洲15个国家49个城市，旅游便利化程度不断提升。

三、“一带一路”旅游政策发展趋势

随着“一带一路”合作的深化，旅游相关政策不断细化，形成了较为完善的政策体系。自2016年起，合作文件中的旅游相关政策日益具体，从宏观的发展政策转向旅游基础设施、旅游市场、旅游投资、旅游产品、旅游展会、旅游教育、旅游交通等更加具体的合作政策。从长远看，未来“一带一路”旅游政策或将呈现如下趋势：

1、旅游合作主体更加多元

“一带一路”倡议最初是中国政府与沿线国家政府和国际组织间的顶层合作，在发展过程中，合作主体不断扩大，城市、企业、高校等多种主体不断加入。2015年5月，新丝绸之路大学联盟成立，吸引了来自22个国家和地区的近百所大学加入，促进了“一带一路”沿线国家的人才培养和文化旅游沟通。2017年7月，中国发起成立世界旅游联盟（WTA），成为中国第一个全球性、综合性、非政府、非营利国际旅游组织，为“一带一路”旅游合作提供产业交流、产业研究、智力服务等多方面支持。2017年10月，一带一路沿线国家城市发展联盟正式批准成立，为政府与企业提供服务，目前已与国际上156个国家建立了联系，与68个国家建立了沟通机制，与20多个国家建立了项目的合作关系，并且在一些国家已经开始了项目合作。随着国际间合作的深度推进，未来的“一带一路”旅游

政策中,旅游合作主体也将更加多元,将会有更多合作主体加入其中,共同推动“一带一路”沿线经济合作和发展。

2、旅游新业态合作渐成热点

随着合作的推进,旅游新业态方面的合作已成为“一带一路”合作中的亮点。2017年7月发布的《中国和俄罗斯深化全面战略协作伙伴关系的联合声明》中提出要丰富服务种类,推动历史和红色旅游合作深入开展。2018年11月发布的《中华人民共和国和西班牙王国关于加强新时期全面战略伙伴关系的联合声明》表明愿利用好双边旅游合作的巨大机遇,探讨在可持续旅游、智慧旅游、旅游创新等领域加强专家互访及最佳实践交流,以提高旅游目的地竞争力。2019年6月发布的《中华人民共和国和俄罗斯联邦关于发展新时代全面战略协作伙伴关系的联合声明》指出,鼓励拓展旅游新形式,包括北极旅游、汽车旅游、主题旅游等。这些以旅游新业态为特点的新型旅游支持手段,成为“一带一路”沿线国家间寻求旅游合作的新趋势。2020年11月发布的《上海合作组织成员国元首理事会关于数字经济领域合作的声明》要求各国开展旅游领域数字化和信息通信技术合作,推动了“一带一路”沿线国家旅游业发展的数字化进程。这些政策的发布为未来沿线国家旅游合作领域与合作手段提供重要参考,也将进一步引领各国在旅游新业态方面的合作。

3、联合申遗持续升温

“一带一路”沿线国家的文化遗产为“一带一路”建设提供文化支撑,也是连接“一带一路”沿线国家文旅交流的重要纽带。2014年6月22日,在卡塔尔多哈举行的第38届世界遗产大会上,中国、哈萨克斯坦、吉尔吉斯斯坦三国联合申报的“丝绸之路:长安—天山廊道的路网”成功申报世界文化遗产,成为首例跨国合作、成功申遗的项目,引发了沿线各国对文化遗产联合保护和联合申遗的重视。近年来,中国文化和旅游部会同国家文物局大力推进与“一带一路”沿线国家文化遗产领域交流合作,截至2018年9月,中国与柬埔寨、缅甸等11个

国家签署了12份文物安全及文化遗产领域双边协定和谅解备忘录。未来，沿线各国在文化遗产领域的合作将不断深入，“海上丝绸之路”的国际研究、保护和联合申遗也将被提上日程，成为旅游相关政策的重要内容。

4、旅游安全地位将更加凸显

自新冠疫情暴发后，旅游业受到了巨大的冲击，“一带一路”合作的重点开始转到抗击疫情上。其中对于旅游政策最直接的影响就是签证政策的变化，许多国家采取了“封国”、“封城”的策略，严格签证管理。2020年3月发布的《二十国集团领导人应对新冠肺炎特别峰会声明》中指出，当前最紧迫的任务是应对疫情及其对健康、社会和经济等带来的复杂影响。旅游作为全球经济中发展势头最强劲和规模最大的产业之一，是恢复经济的重要抓手，疫情的全球大爆发引发了国际对旅游安全的重视。在最新的合作文件中，旅游安全政策开始崭露头角，2021年1月，中国和文莱宣布建立两国间“快捷通道”，确保人员安全流动和旅行；2021年6月，中国发布《“一带一路”疫苗合作伙伴关系倡议》，维护全球各地居民的人身安全，此外，各地也开始纷纷探索“疫苗护照”机制。在接下来的旅游政策中，旅游安全将成为国际旅游交流合作的基础与焦点问题，旅游安全政策出现频率将大幅上升，政策内容也将更加严格。

5、国际政治形势影响更受关注

“一带一路”沿线国家间的合作，受国际政治形势的影响。由于历史传统、经济发展和社会文化差异，沿线国家分别形成了独特的政治制度和政治体制，同时也形成了截然不同的外交态度。“一带一路”沿线国家中，有些国家政局稳定、社会安定、经济繁荣，而有些国家财政局动荡，政府频繁更迭，处于战争频发的水深火热之中，对“一带一路”的立场、态度、战略认知存在偏差，影响了国家间的深度合作。同时，近年来，美国对中亚地区军事的高度关注，是影响“一带一路”沿线国家间合作的不利因素。

第二章 “一带一路”旅游市场合作

吴丽云 徐嘉阳

自 2013 年“一带一路”合作倡议提出以来，中国与“一带一路”沿线国家的交流互通日益频繁、伙伴关系深入发展、互利互惠持续发酵，“一带一路”沿线国家的旅游市场快速发展。“一带一路”沿线国家拥有丰富的旅游资源，在世界旅游经济中占有举足轻重的地位。

一、“一带一路”沿线国家入境游市场

1、入境旅游稳定增长，“一带一路”倡议利好惠及多国

“一带一路”倡议以来，随着沿线国家间经济、社会、文化方面合作的加强，沿线国家的旅游发展也步入新的阶段。2013 年，“一带一路”沿线国家入境旅游人数为 4.31 亿人次，2019 年，“一带一路”沿线国家入境旅游人数 5.98 亿人次，是 2013 年的 1.39 倍，各年平均增长率 5% 以上（图 2-1）。2020 年，受疫情影响，“一带一路”沿线国家入境旅游人数急剧下降，仅为 2.31 亿人次。

“一带一路”沿线各国入境旅游人数保持稳定增长，中亚、南亚沿线国家增速尤快。“一带一路”沿线国家中，从 2013 年到 2019 年，入境旅游人数增幅最大的国家是巴基斯坦，以 697.1% 的增长稳居榜首。巴基斯坦本身拥有着丰富的旅游资源，从喀拉昆仑山脉险峻的山峰到肥沃的印度河平原，从宗教文化遗址到古丝绸之路，这些优质资源为巴基斯坦旅游业的快速发展奠定了良好的基础。“中



图 2-1 2013-2020 年“一带一路”沿线国家入境旅游人数

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

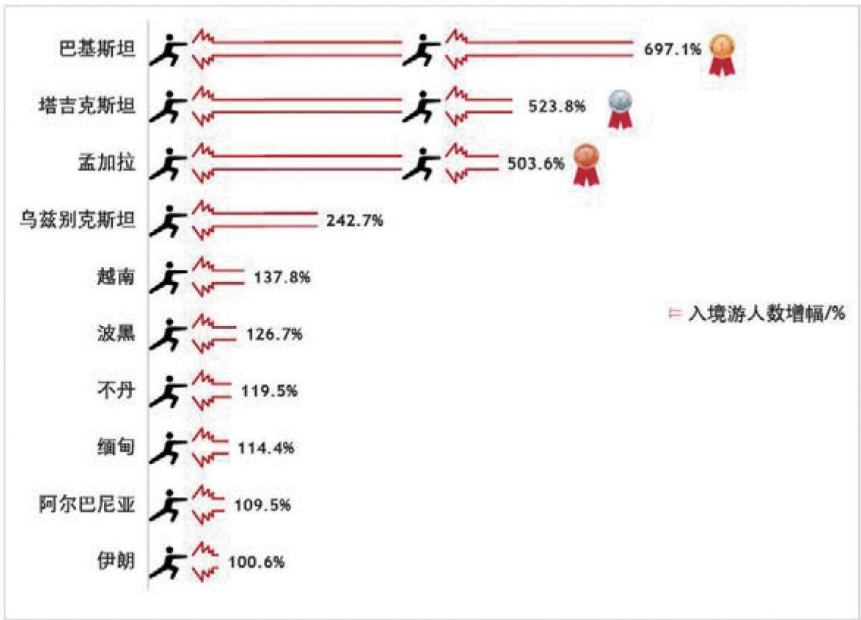


图 2-2 2013-2019 年“一带一路”沿线国家入境旅游人数增幅 TOP10 国家

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

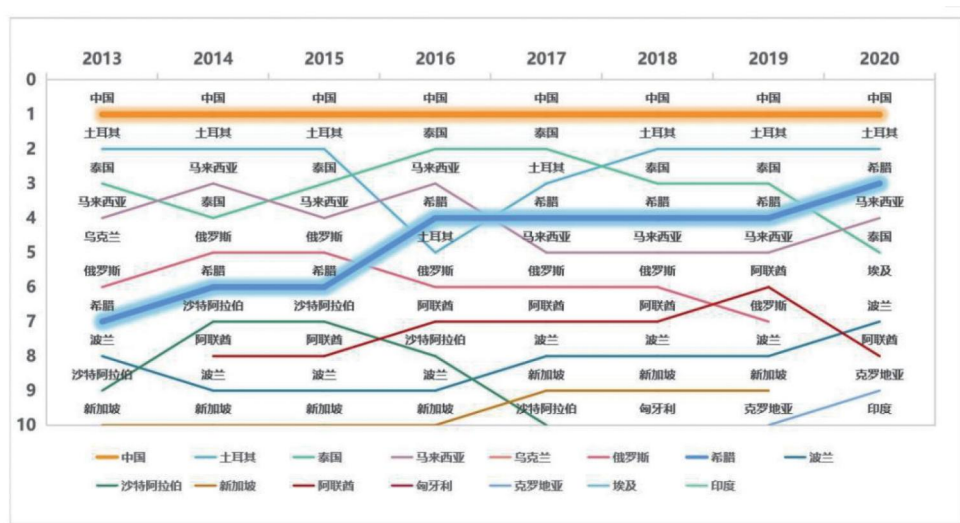


图 2-3 2013-2020 年“一带一路”沿线国家入境旅游 TOP10 国家

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

巴经济走廊”的建设带动了巴基斯坦国内基础设施和交通运输能力的大幅提升，互联互通的贸易渠道和逐年开放的投资环境为旅游业发展提供了良好契机，大大推动了巴基斯坦入境旅游的发展，2019 年，巴基斯坦入境旅游人数达 450 万人次。虽然在入境旅游总体规模上，巴基斯坦入境旅游还有很大的提升空间，但其强劲的发展势头值得关注。其次是塔吉克斯坦、孟加拉国和乌兹别克斯坦，均保持了 240% 以上的增长；越南、波黑、不丹、缅甸、阿尔巴尼亚、伊朗等国也保持了 100% 以上的增幅（图 2-2）。在入境游人数增幅前 10 的国家中，80% 来自东南亚、中亚、南亚等亚洲地区，显示出“一带一路”辐射效果与空间地域临近的强关联效应。

2013-2020 年，“一带一路”沿线国家入境旅游人数 TOP10 国家（图 2-3），虽有小范围波动，但总体排名相对稳定。中国稳居首位，土耳其、泰国、马来西亚等三国始终保持前五位置。希腊增幅最大，从 2013 年的第 7 位攀升至 2020 年的第 3 位，是所有排序国家中位次跃升最多的。俄罗斯和新加坡受疫情影响，2020 年跌出前十。历年的“一带一路”沿线国家入境旅游人数前十国家中，东盟 10 国稳占半数。

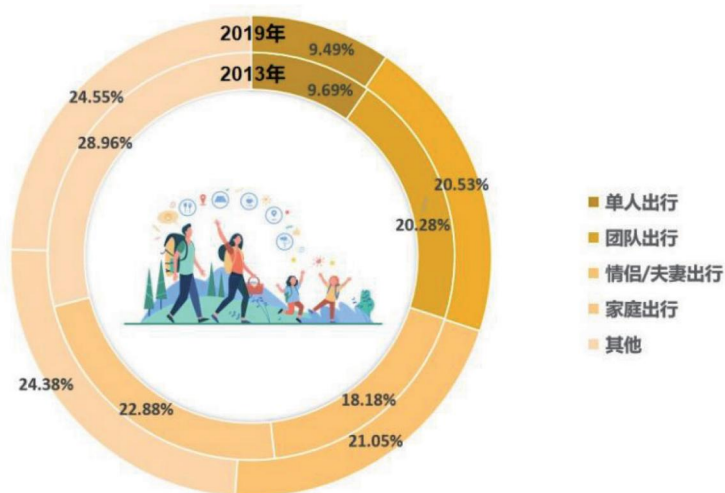


图 2-4 2013、2019 “一带一路”沿线 24 个国家入境旅游同伴变化

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

2、出行同伴选择多样，亲人结伴游备受青睐

随着人们出游经验的丰富和旅行观念的改变，“一带一路”沿线国家入境旅游市场上的亲人朋友结伴游特征日益凸显。2013 年，“一带一路”沿线国家入境游客出游方式选择中，团队出行占 20.28%，情侣 / 夫妻出行和家庭出行分别占 18.18% 和 22.88%（图 2-4），其他出行方式也多为基于婚礼、主题活动等的朋友或家人的目的地集聚性出行，总体看，亲朋好友结伴游是“一带一路”沿线国家入境旅游市场的典型出游特征；2019 年，这一出游特征继续延续，且不断强化。情侣 / 夫妻出行和家庭出行均较 2013 年有较大幅增长，分别占 21.05% 和 24.38%，比 2013 年增长了 4.37%。团队出行比例基本未变。与此同时，独自出游的比例相对稳定，保持在 9% 左右，占比不高，相比于享受远方的“孤独”，与亲人朋友一同出行更受追捧。

“一带一路”沿线国家中，游客出行同伴特征也各有差异。菲律宾是所有国家中单人游客比例最高的国家，2020 年，30.44% 的入境游客以“独行侠”方式到访菲律宾，远高于 9.63% 的平均值。捷克则是团队游客比例最高的国家，2020 年，38.95% 的游客以团队结伴方式到访捷克，远高于 20.24% 的平均值。克罗地亚的

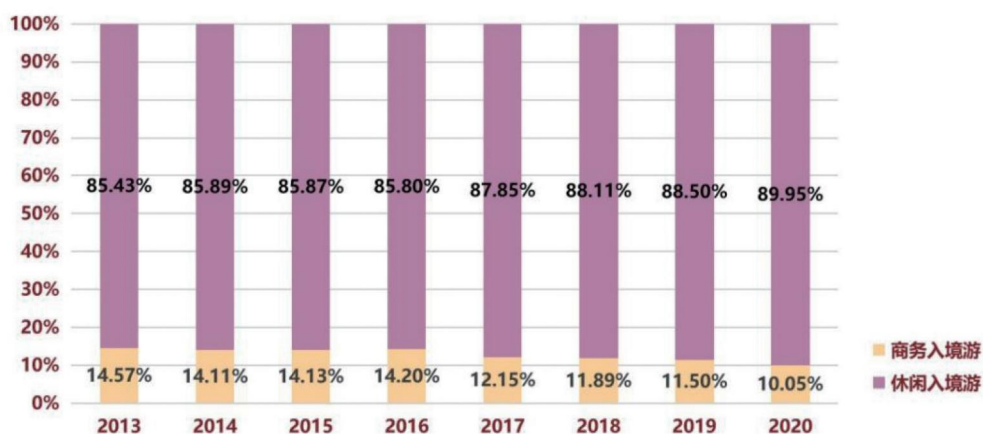


图 2-5 2013—2020 年“一带一路”沿线 24 个国家入境游构成比例变化

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

情侣 / 夫妻到访游客比比比例最高，2020 年，高达 47.18% 的游客以情侣 / 夫妻出行方式到访克罗地亚，是平均 22.36% 比例的二倍多。沙特阿拉伯则最受家庭游客青睐，历年家庭游客的比例一直保持在 44%—50% 之间，2020 年，46.4% 的游客以家庭出游的方式到访沙特阿拉伯，远高于平均值 24.58%。

3、出行目的休闲为主，商务为辅，劳逸结合两不误

从出行目的来看，大部分入境游客的首要出行目的是休闲娱乐，其次才是商务工作。从 2013 年到 2020 年，“一带一路”沿线国家休闲旅游目的的入境游客占比从 85.43% 升至 89.95%，商务入境游客比重相对下降了近 5%，目前仅占 10%（图 2-5）。

入境休闲游中，中国、土耳其、泰国、希腊和马来西亚 2019 年接待入境的休闲游人数都超过了 2500 万人次，中国更以 6703 万人次位居首位（图 2-6）。中国、泰国和希腊 6 年来的入境休闲游人数增幅均超过 50%。越南以 137.62% 的增幅成为入境休闲游增速最快的国家。舒适宜人的自然气候与物美价廉的旅行产品使得越南近年来成为许多人休闲度假的首选之地，海滨港口城市芽庄更是发展成为集休闲、娱乐、运动、温泉于一体的世界知名度假胜地。入境商务游中，中国、

波兰和俄罗斯近年来一直位于入境商务游的前三甲，三者在 2019 年接待的入境商务游客均超 500 万人次。以阿联酋、沙特阿拉伯为首的中东国家沿袭了“海上丝绸之路”的商贸精神，近年来在商务游市场中渐入佳境，不仅抢占了近四分之一的市场份额，且保持了稳定增长。

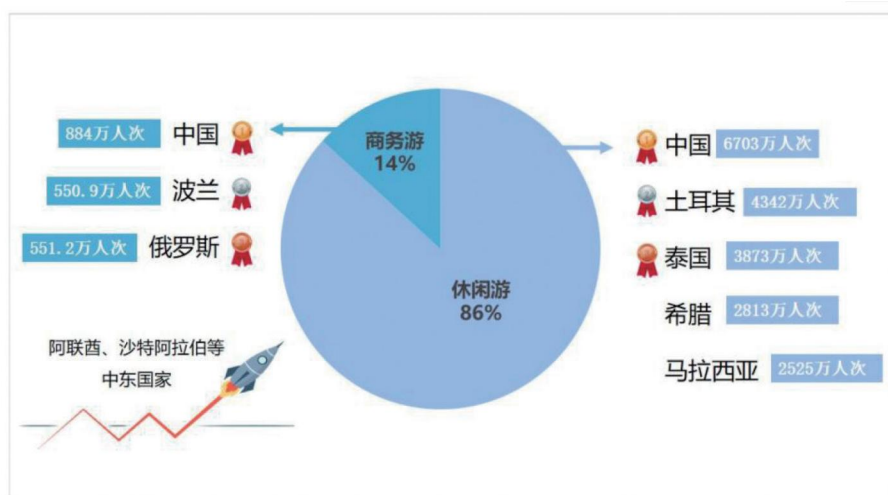


图 2-6 2019 年“一带一路”沿线 24 个国家入境游构成
数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

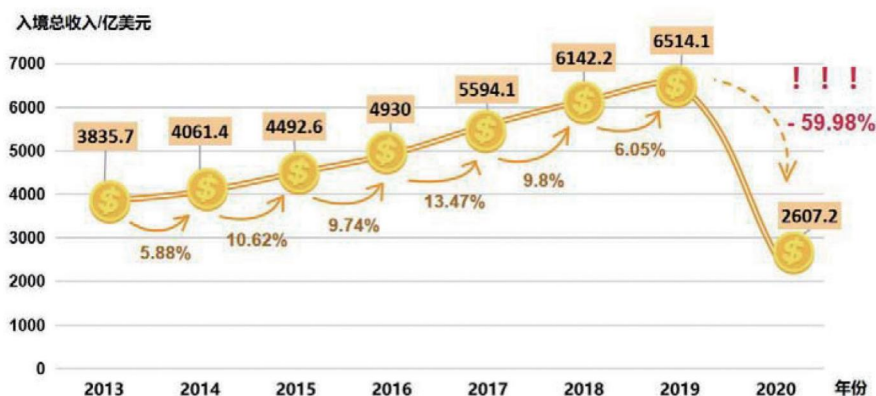


图 2-7 2013-2020 年“一带一路”沿线国家入境游旅游收入
数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

4、入境游收入稳定增长，游客消费力日渐增强

入境旅游的蓬勃发展对“一带一路”沿线国家国民经济产生了深远影响。2019年，“一带一路”沿线国家入境游总收入6514.1亿美元，比2018年增长了6.05%，是2013年的1.7倍（图2-7）。2020年，受全球疫情影响，“一带一路”沿线国家入境旅游收入跌至2607.2亿美元。从2013到2019年，“一带一路”沿线国家入境旅游收入年均增长9.2%，保持稳定增长。从2013到2019年，入境游客人均旅游花费由2013年的890美元增长到2020年的1130美元，游客的消费能力日渐增强。

从入境游收入构成来看，休闲游收入远大于商务游收入，且该优势持续扩大，这是由休闲游庞大的人流量所决定。2013年，商务游收入尚能占入境游收入的五分之一，随后却一路下跌，2019年，跌破15%。但相较于休闲游1022美元的人均消费而言，商务游1242美元的人均消费，依然值得关注。

5、中国稳居入境游收入榜首，土耳其后发优势凸显

“一带一路”沿线国家中，入境旅游收入前十的国家相对稳定（图2-8）。

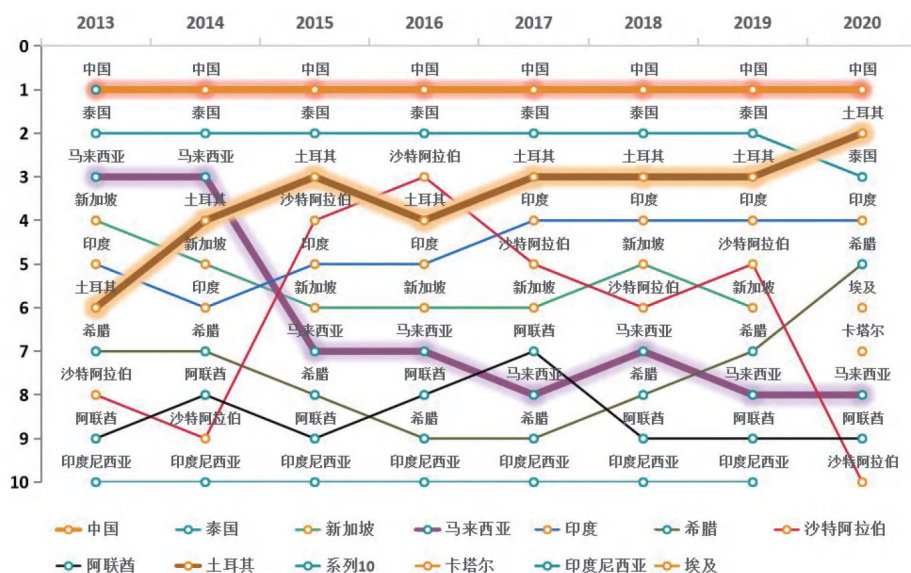


图 2-8 2013-2020 年“一带一路”沿线国家入境旅游收入 TOP10 榜单

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

中国稳居榜首,以一国之力贡献了“一带一路”沿线国家入境旅游收入的五分之一。但随着其他国家入境旅游的发展,中国的领先优势有所减弱。2013 年中国入境旅游收入占“一带一路”沿线国家旅游总收入的四分之一左右,到 2020 年,这个比例已下降到 19%。

泰国、马来西亚、印度、希腊、沙特阿拉伯、阿联酋、土耳其等国始终保持在入境旅游收入 TOP10 榜单内。土耳其入境旅游收入增长迅猛,在 TOP10 榜单内,从 2013 年的排位第 6 跃升至 2020 年的第 2。马来西亚则一路下行,从 2013 年的第 3 位降至 2020 年的第 7 位。新加坡则受疫情影响,在 2020 年滑出入境旅游前十。

在“一带一路”沿线国家入境旅游发展态势良好的背景下,阿富汗、伊拉克、科威特、叙利亚、也门等多国因国内政局动荡和局部武装冲突,游客安全难以保障,这些国家的入境游收入已连续多年下降。

6、购物消费占比最高,买买买值得关注

“一带一路”沿线国家入境游消费结构也在经历着变化。餐饮、住宿、交通、购物、游览娱乐及一日游的花费增幅均在 8% 以上,其中购物消费以平均 22.42% 的占比成为入境游消费的首要支出(图 2-9)。“买买买”是各国入境游客最为

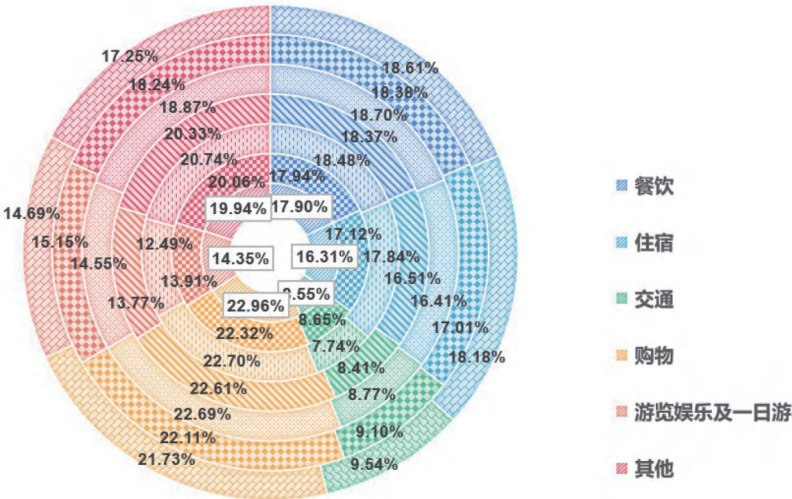


图 2-9 2013-2019 年“一带一路”沿线 24 个国家入境游收入构成

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

突出的特征。各国的品牌商品、奢侈品、特色产品等成为入境游客最为偏爱的购物内容。住宿消费有所增长，由 2013 年 16.31% 上升至 2019 年的 18.19%，游客对住的品质要求在提升。

二、“一带一路”沿线国家出境游市场

1、出境人数保持增长，休闲旅游仍占绝对主导

“一带一路”的建设促进了沿线各国经济发展和人民生活质量的提高，也为普罗大众更加积极地参与到出境游当中提供了坚实的物质保障。2013 年，“一带一路”沿线国家出境游人数为 3.67 亿人次。2013-2019 年，“一带一路”沿线国家出境游人数增长了 1.4 倍，年均增长率为 6.1%，2017 年的增幅更是达到了 9.47%。2020 年，“一带一路”沿线国家有 5.23 亿人次参与了出境旅行，其中 78% 为休闲出游，22% 为商务出游。虽然休闲游依旧在出境游中占据绝对主导地位，但是商务出游所占比例在缓慢增长，2013 年到 2019 年，商务出游比例从 21.07% 增长到 23.09%。2020 年，受新冠疫情影响，“一带一路”沿线国家出境游出现断崖式下跌，出游人数仅为 2.17 亿人次。

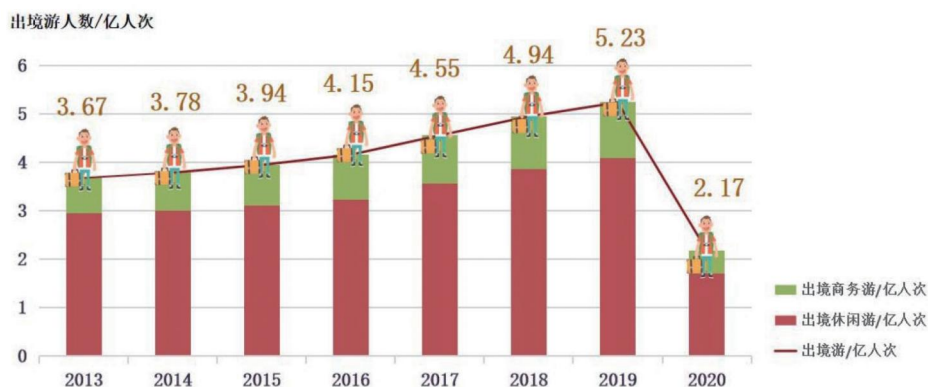


图 2-10 2013-2020 年“一带一路”沿线国家出境游人数

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

2、中俄稳居出境游国家榜首，TOP10 国家相对稳定

从 2013 到 2019 年，中国和俄罗斯以庞大的人口基数和旺盛的出游需求稳居“一带一路”沿线国家出境游榜首，两国的出游人数占“一带一路”沿线国家出境游总人数的近三分之一（图 2-11）。中国的出境游人数一直保持稳定增长，2013 到 2019，由 5869 万人次增长到 1.03 亿人次。俄罗斯出境游人数则呈现先降后增，2013 年，俄罗斯出境旅游人数已达 4475 万人次，此后一路下跌至 2016 年的 2689 万人次。2017 年，在俄国内经济稳定运行，国内旅游价格上涨的推动下，出境游以 29.77% 的增幅止跌回暖了俄罗斯出境游市场。2019 年，俄罗斯出境旅游人数恢复至 4040 万人次，但仍未恢复到 2013 年出境游水平。

“一带一路”沿线国家历年出境游 TOP10 中，除中俄两国外，新加坡、波兰、马来西亚和乌克兰均位于前十序列，虽偶有波动，但整体相对稳定。印度出境游位次整体呈现向上态势，从 2013 年的位居第 7，跃升至 2019 年的第三，2020 年受新冠疫情影响，又回缩到第 5 位置。



图 2-11 2013-2020 年“一带一路”沿线国家出境游人数 TOP10 榜单

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

3、出境方式海陆空全覆盖，航空与公路最受欢迎

“一带一路”倡议提出后，沿线国家的交通、道路设施不断提升，国家之间的交通方式更加多样，航班、车次、船次稳定增加，为“一带一路”沿线国家居民的出境游提供了交通基础。“一带一路”沿线国家的旅游出行方式中，航空、铁路、公路、水路四种方式并存（图 2-12）。航空出行是游客远距离出境游的首选，半数多游客乘飞机出行。2019 年，航空出行人数占比高达 57%，是最受游客青睐的出境旅游交通方式。在商务游当中，时间显得更加珍贵，有近七成游客选择航空出行，远高于休闲游游客航空出行比例。2019 年，“一带一路”沿线 48 个国家中有 2.71 亿人次选择飞机作为出境旅行的交通工具。印度的出境游客几乎全部选择飞机（99.28%）作为交通工具，阿联酋、以色列、塞浦路斯和菲律宾也有超过 90% 的出境游客选择航空出行。在陆路交通中，选择公路出行的人数远大于铁路出行，这一情况多出现于国界相邻国家的出境游当中，公路驾车的可控性与便捷性使其相对于站点固定的铁路更受游客偏爱。三分之一的游客选择公路出行，2013-2015 年，有 36% 的游客选择公路出行，近几年这一比例下降至 33% 左右。铁路和水路出行方式占比较低，仅有 10% 左右的游客选择乘坐火车或轮船等方式出境旅游。在“一带一路”沿线国家中，有 15 个国家的超半数出境游客会选择

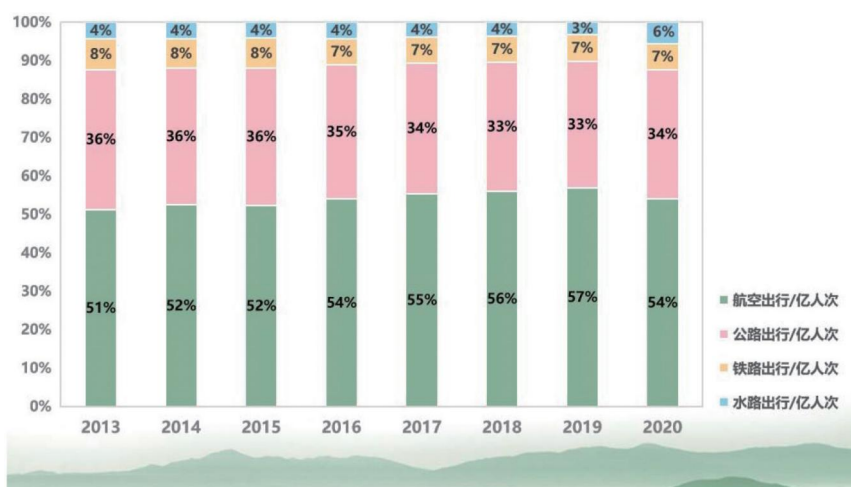


图 2-12 2013-2020 年“一带一路”沿线 48 个国家出境游交通方式

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

公路出行，这些国家大多位于中东欧地区，空间相邻且国家间距相对不远，促进了这些国家间公路出游的发展。

4、结伴出游仍为主流，“独行侠”未成气候

“一带一路”沿线国家出境游中，人们青睐于结伴出行。数据显示，近 60% 的游客选择和伴侣、家人同行或是参团出游，仅有不到 10% 的人群独自前往异国他乡旅行（图 2-13）。异质文化和远距离带来的不仅仅是吸引力，还有未知的挑战 and 大多数大众旅行者难以克服的恐惧，单人出境游依然是少数人的选择。结伴出行方式中，2019 年，团队出行占比最高，21.27% 的人选择跟团游；其次是家庭出游，20.36% 的游客选择和家人出行；情侣 / 夫妻出行占 16.99%。

波兰游客参团意愿并不强烈，他们更偏爱独自出行（24.55%）或与社交关系亲密的人群（60.29%）共同出游。越来越多的以色列人民选择和自己的伴侣共同出境旅行，2013 年以色列出境游中情侣的比例为 15.32%，2017 年就超过了 20%，2020 年达到了 22.51%。在其他国家这一比例基本保持不变的情况下，以色列的明显增长值得关注。沙特阿拉伯的出境游客中，有一半以上与自己的

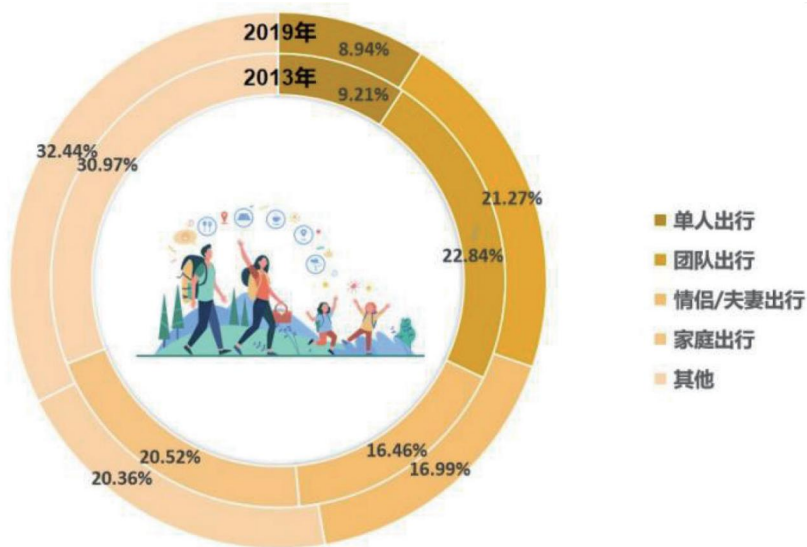


图 2-13 2013、2019 “一带一路”沿线 24 个国家出境游伴侣选择

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

家人同行，远超其他国家的家庭游比例，这或许与伊斯兰教浓重的传统思想和家庭观念有关。印尼人民偏爱团队旅行，有近半成的游客在出境游当中选择参团。团队游比例排名前十的国家中，至少有四分之一的该国出境游客选取这一方式出游。

5、出境游消费体量巨大，休闲消费占主导

“一带一路”倡议以来，沿线各国互联互通，不仅增强了沿线国家的经济实力，也提升了居民旅游消费能力。2019年，“一带一路”沿线国家出境游消费总额6223亿美元，是2013年的1.75倍，年均增长率接近10%（图2-14）。2020年，受新冠疫情影响，“一带一路”沿线国家出境游消费迅速下滑，全年旅游出境消费总额仅为2665亿美元。

休闲消费依然是出境游消费的主体，平均占出境游消费的78.61%。从休闲消费在当年消费的占比看，休闲消费整体呈增长态势，从2013年的77.08%，增长到2020年的79.7%。同商务消费相比，无论是增幅还是增速，休闲消费在出境游消费市场中都处于主导地位。中国、印度与俄罗斯在休闲游市场中贡献颇丰，

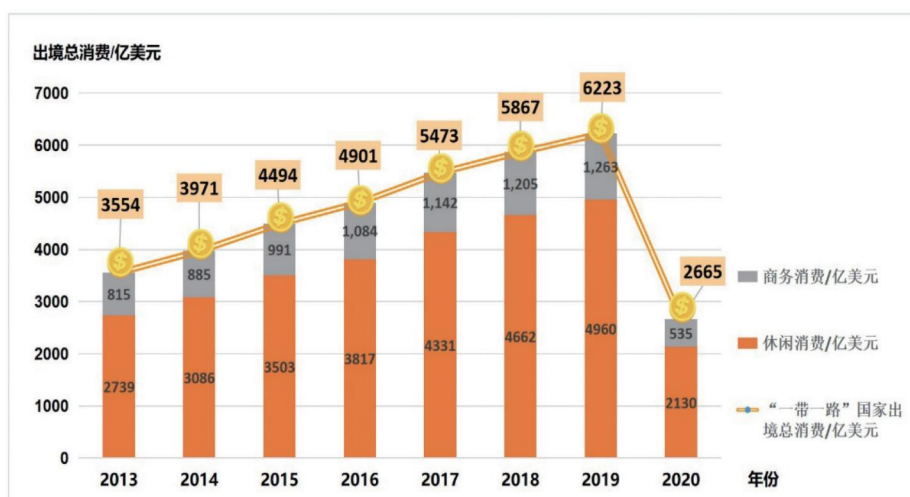


图2-14 2013-2020年“一带一路”沿线国家出境游消费

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

而马来西亚和土耳其的商务游消费市场则蕴含着巨大的潜力。

近年来，中国高端电子产品日益受到海外市场的追捧。出色的性能和过硬的品质所造就的高性价比，让小米、华为、一加等品牌的智能产品在海外畅销；大疆无人机、国产充电宝都凭借着价格优势，异军突起，成为了海外游客来华消费的一大热点。康养旅游是现代健康生活理念所催生的一种新兴旅行方式，带动了各国出境游市场中大健康产品的消费。美国斯坦福大学 2019 年发布的国际医疗健康旅游经济报告显示，亚太地区是全球医疗健康旅游最大的交易市场，排在前三位的是：印度、泰国和马来西亚。欧洲是仅次于亚太地区的活跃区域。同时，这一产业的新兴市场在中东和拉美国家。在亚太地区，印度医疗旅游市场规模最大，并在疫情前保持每年 15% 的增速其客源国主要是孟加拉国、阿曼、乌兹别克斯坦、也门、马尔代夫、斯里兰卡、缅甸等国，其中 80% 是手术病人。“一带一路”沿线国家通过深化合作把握康养旅游产业的发展机遇。中国参与阿联酋、沙特阿拉伯、土耳其等国的国际医疗健康城战略咨询项目，并与多国共建滨海度假健康旅游示范区。

奖励旅游消费同样是国际旅游细分市场中一个不可忽视的重要组成部分。作为国际顶级会展之都，新加坡商务客占总游客人数的 20% 以上，每年有超过 50 亿元新币的消费，占总旅游消费的 30%。自 2013 年以来，中国一直是泰国会展旅游的最大客源国。其中，来自北京、上海和广州的出境会奖游客每年都为泰国创造极高的消费价值。此外，深圳、青岛、杭州和苏州是近年来新晋崛起的会奖游客输出城市，中国二、三线城市会奖旅游市场的发展蕴含着巨大的潜力。

6、中国稳居出境游消费 TOP1 国家，多国消费保持稳定

出境游消费 TOP10 上榜国家相对稳定，中国依然稳居榜首地位，贡献了“一带一路”沿线国家三分之一的出境旅游消费额（图 2-15）。新加坡、马来西亚、印度尼西亚、波兰、菲律宾等国稳居 TOP10 榜单，但新加坡、马来西亚、印尼排名都有一定比例的下降，菲律宾各年排序多有波动，波兰波动中微升。越南



图 2-15 2013-2020 年“一带一路”沿线国家出境游消费 TOP10 榜单

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

自 2015 年进入榜单以来，排名一直稳步提升，虽受疫情影响有小幅回落，但总体依然呈现出迅猛的发展趋势。印度名次在波动中逐步上升，且以连续 3 年位居第 2。

三、“一带一路”沿线国家出入境双向旅游发展

1、出入境市场持续扩大，增速涨中趋稳

2013 年，“一带一路”沿线国家出入境旅行人数为 7.98 亿人次，占全球出入境游的 36.38%。七年“一带一路”建设，旅游产业成绩斐然，2018 年“一带一路”国家出入境游突破 10 亿人次，2019 年达到 11.21 亿人次（图 2-16）。在拥有庞大市场体量的情况下，出入境人数依然保持高速增长，2017 年和 2018 年的增速都达到了 9%，年均增速 5.87%。中国、俄罗斯、土耳其成为“一带一路”国家中出入境游人数前三甲，希腊名次稳步提升（图 2-17）。



图 2-16 2013-2020 年“一带一路”国家出入境双向旅游人数

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

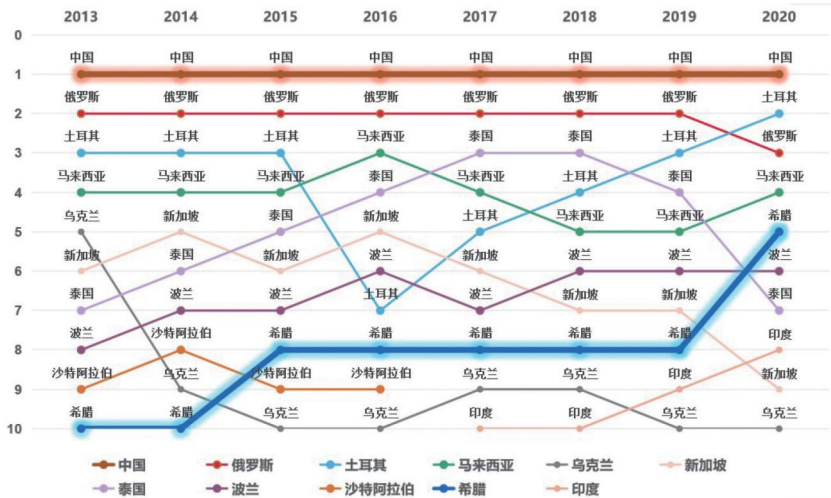


图 2-17 2013-2020 年“一带一路”国家出入境双向旅游人数 TOP10 榜单

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

2、休闲消费占据主流，东南亚国家势头强劲

全球出入境游消费的三分之一来自于“一带一路”国家，平均总量达到 10007 亿美元（图 2-18）。其中休闲出入境游平均消费 8087.95 亿美元，是商务出入境游消费市场的 4 倍之多。现有 15 个国家出入境旅游消费市场规模超过了 200 亿美元，除中国、俄罗斯、土耳其外，其他国家相对集中于东南亚地区（泰国、

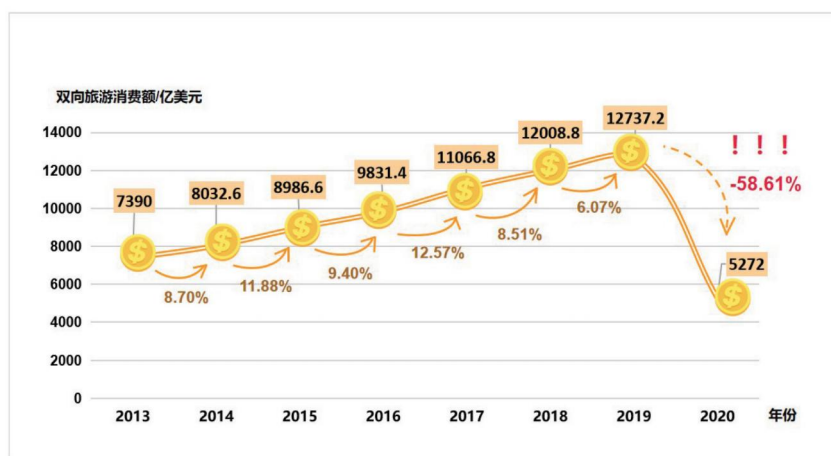


图 2-18 2013-2020 年“一带一路”国家出入境双向旅游消费额

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

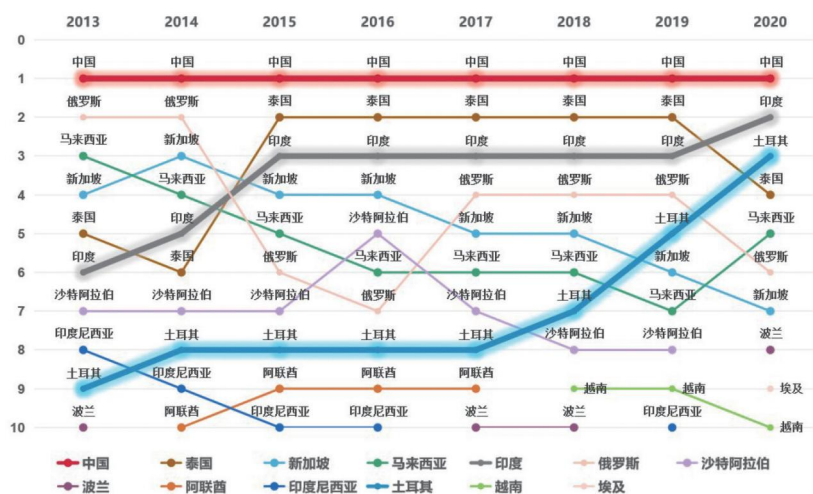


图 2-19 2013-2020 年“一带一路”国家出入境双向旅游消费额 TOP10 榜单

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

新加坡、马来西亚、越南、印度尼西亚）。中国稳居消费额 TOP10 榜单的冠军之位，印度和土耳其牢牢把握住发展机遇，出入境消费市场持续扩张（图 2-19）。新加坡、俄罗斯、马来西亚一直位于榜单 TOP10，但名次下滑明显。沙特阿拉伯受 2020 年疫情影响更是直接跌出了榜单前十。

四、“一带一路”旅游中的中国画像

1、中国成热门旅游目的地，商务游市场亟待振兴

中国在“一带一路”旅游中占有举足轻重的地位，是众多国家的主要客源国和热门旅行目的地。“一带一路”建设期间，中国共接待国际入境游客 4.76 亿人次，其中休闲游人数占比 83.51%，商务游人数占比 16.49%，年均入境外汇收入 7776.7 亿元，在“一带一路”旅游市场中稳居第一。越南、俄罗斯、蒙古、马来西亚、菲律宾和新加坡是中国在“一带一路”市场中的五大入境客源国，年均向中国输送 923 万游客，为中国入境旅游市场注入不竭的活力。中国虽然一直稳居商务入境游的第一大市场，但在大部分其他国家商务入境游人数呈正向健康成长的情况下，出于商务目的前往中国的外国游客数量却日渐式微（图 2-20）。如何充分发挥“一带一路”框架优势，在大力发展休闲游的基础上重视商务游，是未来中国入境游需要思考的方向。



图 2-20 2013-2020 年中国商务入境人数

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

2、接待游客类型全覆盖，深圳最受喜爱

中国在 2019 年接待的旅行团游客、家庭档和情侣档游客均超过了 1500 万，6 年来一直是这三大人群最钟情的旅行目的地。相较于北京和上海，入境的国际游客更偏爱深圳和广州，其中深圳年平均接待国际游客 1200 万人次，是中国唯

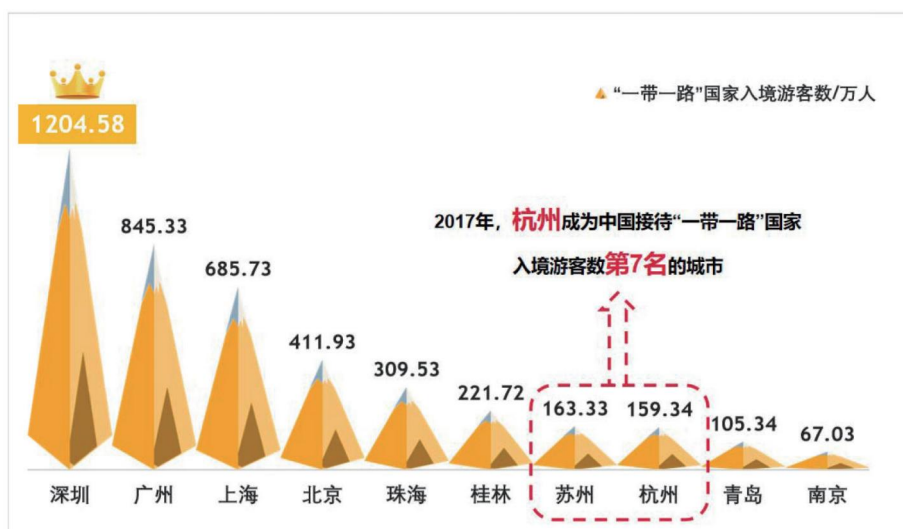


图 2-21 2013-2020 年中国主要城市年均接待“一带一路”国家入境游客数

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

——一个接待国际游客数破千万的城市，无愧于“异域之城”的称号（图 2-21）。得益于“东方休闲之都”的打造，2017 年杭州入境游人数赶超苏州，跃居中国接待“一带一路”国家入境游客人数第 7 名的城市。

3、出境商务市场收缩，首选结伴出游

中国的出境游市场规模大于入境游市场，年均出境游人数超过 8000 万人。相比入境市场，出境市场中商务出行的份额明显增大，平均占比 30%。虽然绝对数量呈增长趋势，但同入境游市场相似，商务细分市场的收缩情况依然存在。就抗风险能力而言，商务游的能力明显要强于休闲游，在此次疫情的冲击下，商务游的市场份额非但没有减少反而还增加了，但伴随着休闲游的复苏，商务市场能否抗住压力还是个未知数。中国游客选择家庭、情侣、团队出游的比例较为均衡，相对市场接受度较低的依然是单人出行（图 2-22）。

4、买买买热度不减，高品质消费成新流行

2019 年，中国居民出境消费达 12388 亿元，是旅游外汇收入的 1.4 倍。中国从旅游出入境消费基本持平到出境消费远大于入境收入，一方面反映出中国经济

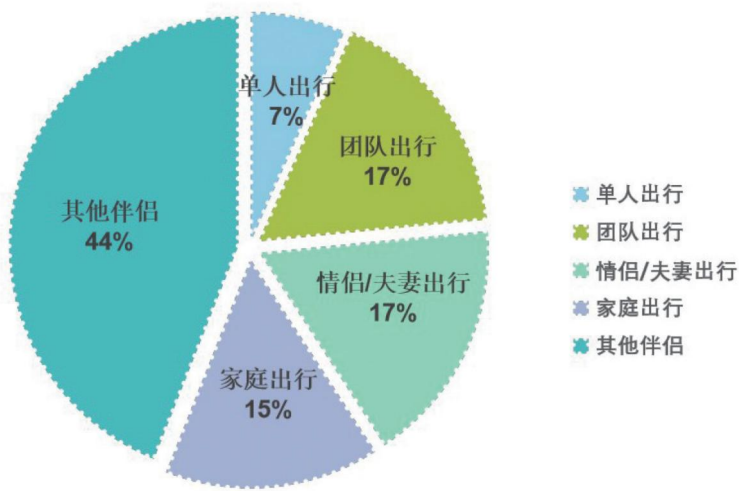


图 2-22 中国游客出境伴侣选择

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制



图 2-23 中国公民出境游消费比例

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

实力的快速发展和人民生活水平质量与消费能力的提高，另一方面也为中国入境旅游市场的可持续发展敲响了警钟。在出境游消费中，购物仍然以 33.9% 的平均占比成为中国游客支出最多的市场，但总体占比趋势缩小；与此同时，游客们愿意在住宿上投入更多的金钱成本，以获得更高品质的服务（图 2-23）。餐饮、交通、游览娱乐及一日游支出相对稳定，尚未表现出大幅度的市场变化。

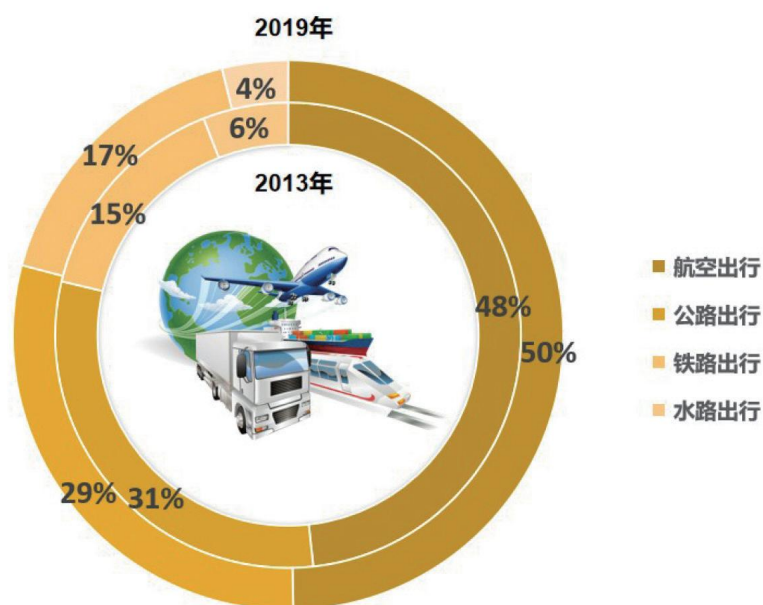


图 2-24 2013、2019 中国公民出境游交通方式对比

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

5、航空与公路出行优势明显，铁路出行体系逐步完善

在出境游的方式的选择上，中国铁路出行以平均 16% 的占比位居 31 个“一带一路”国家第二位，这对于拥有着庞大出境游体量的国家来说是一个值得肯定的成绩。就国内选择来看，航空与公路出境依然占主导优势，但铁路出境人数有逐步扩大的趋势（图 2-24）。近年来，中国的铁路布局得到了全方位的提升，覆盖范围的全面扩大和高铁的进一步普及使得铁路出行在国人的生活中愈发重要。滇越铁路、泛亚铁路、中哈铁路、中蒙铁路等将中国与周边国家紧密相连，正在建设中的中尼铁路和中泰铁路将进一步完善中国的国际铁路通航体系。依照当前的发展趋势，未来将会有更多的游客选择铁路作为出境旅行的交通方式。

6、东南亚国家备受青睐，性价比成首要影响因素

中国游客最喜爱的出境目的地依然是东南亚国家，舒适宜人的自然气候、相似但不相同的文化背景以及相对低廉的出游成本对中国游客都产生了强大的吸引力。泰国是是中国公民出境游的第一大目的地，每年平均有 800 万人次前往泰国

旅行，约等于前往越南、马来西亚和新加坡的人数总和（图 2-25）。在排名前十的国家中，柬埔寨的增势喜人，2018 年是突破最大的一年，增幅达到了 67.2%，直接帮助其从稳定了五年的第 8 位上升至第 5 位（图 2-26）。中国是柬埔寨最大的客源国，平均每年向其输送 116.36 万游客。柬埔寨准许且鼓励国内旅游企业接受中国游客使用人民币，并出台了中国游客可 3 年多次往返的便利签证政策，并增加了直飞中国的航班，这些旅游利好政策是柬埔寨抓住中国市场的关键。



图 2-25 2019 年中国公民出境旅游目的地 TOP10
数据来源：图片根据 Passport 欧睿旅游信息数据库数据
自制



图 2-26 2013-2020 年中国出境旅游目的地 TOP10 榜单
数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

五、新冠肺炎疫情冲击下的“一带一路”旅游市场

2020年初，席卷全球的新冠肺炎疫情暴发，各国的居家隔离政策将全球旅游业“冰封”在了进退维谷的状态之下。这场突如其来的疫情深度冲击了全球旅游业的发展，虽然经过各国人民艰苦卓绝的抗疫“攻坚战”后，各行各业已复产复工，但“一带一路”沿线旅游业的复苏依旧任重道远。

1、出入境旅游市场削减过半，旅游大国损失惨重

2020年，“一带一路”沿线国家出入境人数削减过半，总人数仅为4.47亿人次，不足2013年的60%（图2-27）。消费市场同样不容乐观，出入境消费与收入损失均接近60%（图2-28），此前获利最多的几个国家受到的损失也最为严重，包括俄罗斯、泰国、菲律宾、马来西亚和印度等国。小岛屿发展中国

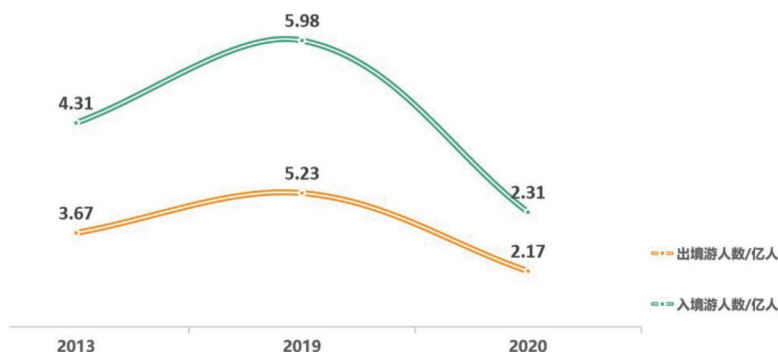


图 2-27 疫情影响下
“一带一路”国家出入
境人数

数据来源：图片根据
Passport 欧睿旅游信息
数据库数据自制

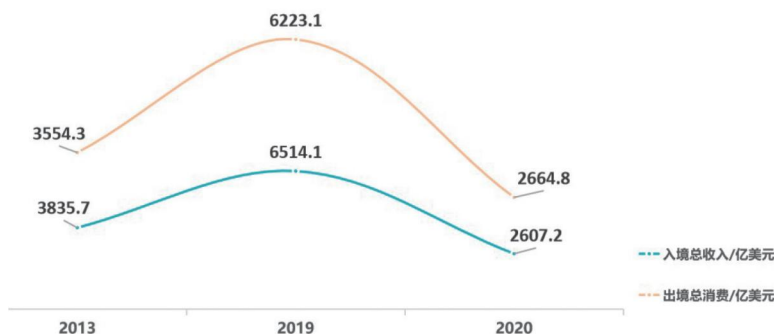


图 2-28 疫情影响下
“一带一路”国家出入
境消费与收入

数据来源：图片根据
Passport 欧睿旅游信息
数据库数据自制

家（SIDS）包括巴林、马尔代夫和新加坡等国的国际游客接待量下降了 77%，这对于国民经济高度依赖于旅游产业的国家来说无疑是致命的打击。虽然新冠肺炎病毒疫苗已经在全球尤其是中国大面积接种，但国际旅行的回暖依然还需要漫长的等待。

2、疫情催生特殊变化，旅游业复苏任重道远

在疫情期间，出入境旅行的数据变化也出现了一些有趣的现象。就入境游人数而言，休闲游（-64.40%）的损失比商务游（-59.15%）更惨重（图 2-29）。新加坡、俄罗斯和罗马尼亚损失了近 80% 的入境休闲游客，土耳其更是损失了 94% 的商务游客和 93% 的商务外汇收入，好在土耳其的休闲旅游市场抗住了疫情的冲击，外汇收入仅减少了 35%，是疫情期间入境休闲游收入 TOP10 国家中降幅最小的，这与土耳其近年来大力发展的医疗旅游紧密相关，即便在疫情期间，也有来自美国、加拿大、英国、荷兰等国家的患者到土耳其进行医疗保健旅游。

限制人数与接触的疫情防控政策让组团旅行开展的难度陡增，同时也从侧面推动了单人出行和以情侣、家庭为单位的入境游。疫情期间，情侣出游占比增幅 1.31%，成为了七年来占比增幅最大的一次。在入境旅游收入构成中，酒店住宿业的占比猛增，从 2019 年的 18.19% 增长到了 24.40%。疫情期间的国际旅行总是伴随着“隔离”政策，7 至 14 天甚至是 28 天的隔离大大增加了旅行的时间成本，

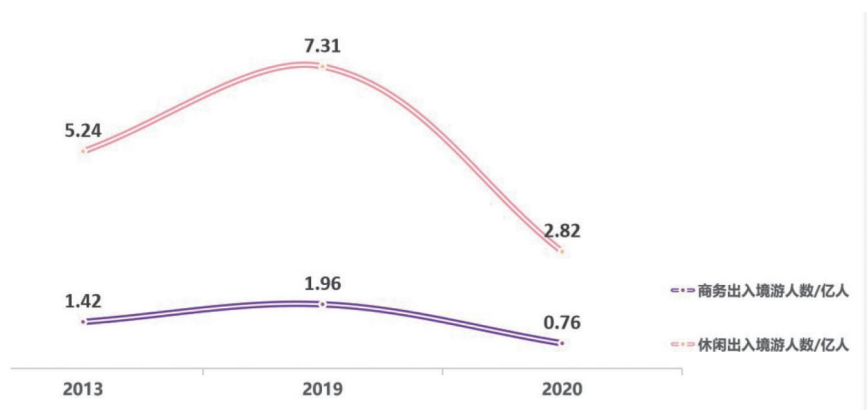


图 2-29 疫情影响下“一带一路”24 个国家商务与休闲出入境人数

数据来源：图片根据 Passport 欧睿旅游信息数据库数据自制

当然也为酒店业的复苏提供了机会。罗马尼亚在餐饮、购物、交通和游览娱乐及一日游中损失的外汇收入均高达 95%，这意味着罗马尼亚的入境游市场几乎处于“停摆”的状态。

3、合作对抗全球疫情，携手共度行业难关

新冠肺炎疫情肆虐期间，旅游市场受到了严重冲击，线下文化交流和跨境旅游也一度中断。但各国从自身国情出发，积极采取一系列措施，借助“一带一路”合作框架，携手共促旅游产业复苏。

“一带一路”的重要建设成果中欧班列成为了防疫物资运输的重要物流通道，截至 2021 年 3 月底，已累计发运防疫物资 1104.6 万件。中国同印度尼西亚、阿联酋、马来西亚、巴基斯坦、土耳其等共建“一带一路”伙伴国开展疫苗联合生产，还将同各国在传染病防控、公共卫生、传统医药等领域拓展合作。中国政府出台大量惠民政策，重点打造数字经济赋能旅游产业，将线下活动转移到线上，推出云演出、云看展、云直播、云购物等无接触文旅项目，引导绿色消费，合理控制流量，发放优惠券刺激旅游消费，为疫情常态化下推动“一带一路”旅游产业国际合作，促进“一带一路”沿线国家旅游产业复苏和繁荣发展提供了示范和借鉴。各国共建数字“一带一路”，促进跨境健康码认证支持的绿色出行数字平台建设，规避旅游出行人员受病毒感染，并评估其感染风险。

第 17 届中国—东盟博览会采用“线上+线下”的双线联动模式，给中外企业免费提供线上展示、在线洽谈和会议、直播推广和跨境电商等功能。云上东博会设置中国商品馆、东盟国家馆、特邀合作伙伴和“一带一路”国际馆，提供国内外知名电商平台链接服务，观众可通过云上东博会平台实现一站式采购中国、东盟 10 国及其他国家商品。同时在网上举办线上跨境采购对接会、网红带货直播、东盟产品推介会等贸易投资促进活动。

“2020 中国马来西亚文化旅游年·丝路数字文旅”活动强调以网络动漫、网络音乐、网络直播、短视频等业态多领域、跨平台的融合创新为载体，寻求新时代下文旅产业发展的新动能。加快推动“一带一路”沿线国家数字文化和

旅游产业的国际合作，促进中马两国数字文化产业交流。咪咕打造了全球首场5G+4K+VR珠峰慢直播，创下了最高海拔5G+4K+VR直播记录，在抗疫时期，咪咕还打造了5G云赏樱等线上观景活动，为用户提供了更沉浸式、场景化的视频旅游体验。

六、“一带一路”旅游市场合作实践

作为国家间顶层合作倡议，“一带一路”为促进沿线国家间的融通互联提供了优质抓手，有效推进了沿线国家间利益共同体的打造。在旅游市场中，各国秉承着价值共创的理念，积极强化各领域内的互通合作，以多样化的合作机制，探求多方共赢的市场发展。

1、联合营销

联合宣传营销是旅游市场合作中运用最为普遍的方式之一。通过国家间旅游企业的对话和旅游平台的搭建，充分发挥各自旅游资源优势，弥补市场发展中的短板，实现“1+1>2”的促销效果。边境城市依托优越的区位条件和文化关联性的特质，可通过跨境旅游合作区的建设，深化双边旅游市场合作。

中国与东盟已互为重要旅游客源国和目的地，加快跨境旅游市场间的交流，是两大区域人民共同的愿望与诉求。自2017年组建边关旅游联盟以来，中越两国的互动交流日益增多，现已联合推进白浪滩景区与茶古景区的跨境项目、中越德天（板约）瀑布跨境旅游合作区、中越友谊关—友谊国际旅游合作区、南海国际邮轮母港及航线等多个项目之间的促销联动；广西还与越南携手打造国际红色旅游目的地，越青年大联欢、中越跨国山地越野赛等活动先后在龙州、靖西举办，靖西孟麻—越南北坡红色旅游合作区项目建设正在推进，胡志明革命遗址景区已具备接待功能。中越两国深入挖掘各自旅游资源内涵，积极寻找文化交叉点，并以此为基础构建跨境旅游合作区，所设计的旅游产品既能充分

体现两国的文化特色，又契合入境游客的旅游需求，展现出联合促销的最大化成效。

消费市场上的异业合作同样能使旅游目的地大放异彩。为了吸引中国游客，卡塔尔与众多国创品牌联名促销：华为 P30 新机上市期间，卡塔尔与华为联合推出了卡塔尔主题壁纸以及一系列新媒体营销活动，通过视频、图片的呈现，让中国游客“直面”卡塔尔；卡塔尔与国潮化妆品品牌玛丽黛佳亦有合作，玛丽黛佳的元旦套装为卡塔尔量身定制了两种彩妆，精致的外形与包装赢得市场强烈认同，也使得人们对卡塔尔这个神秘国度产生了浓厚的兴趣。

沙特旅游局（STA）与印度领先的在线旅行社 Travel Boutique Online（TBO）签署了谅解备忘录（MoU），以通过 TBO Academy 平台上的创新计划开发沙特的目的地文化；同时，沙特阿拉伯的航空公司和阿联酋航空发起了新的互惠忠诚协议，为两国之间的旅行通航带来了更为便利舒适的服务。

2、统一品牌

如果说旅游资源是一个目的地的核心吸引力，那么旅游地形象就是“金装”和“马鞍”。优质的旅游资源也需要科学的整合手段，由此形成旅游地品牌，彰显价值。统一的品牌往往具有强大的示范效应，它能塑造专属于旅游地的价值形象，增强游客对目的地的信赖感并巩固游客的重游意向。节事活动与文化展览通过体验性极强的主客交互和可视化场景，生动传达了各国的文化故事。

中国与中东欧、东盟、俄罗斯、尼泊尔、希腊、埃及、南非等国家和地区共同举办文化年活动，形成了“丝路之旅”、“中非文化聚焦”等十余个文化交流品牌，打造了丝绸之路（敦煌）国际文化博览会、丝绸之路国际艺术节、海上丝绸之路国际艺术节等一批大型文化节会；“志合者，不以山海为远”的主题展在全球 298 个驻外机构和海外中国文化中心展出，展示了中国在“一带一路朋友圈”中的品牌形象。

土耳其推出了一项以“美索不达米亚”为品牌的推广方案，该品牌创建旨在向世界推广提升安纳托利亚东南部地区的旅游潜力。以自然和文化遗产为核心的

品牌不仅拥有强大的资源背景支撑，而且品牌形象鲜明，含义丰富，包容性强，可扩展空间巨大，是饱含潜力的一个旅游品牌。中国与印度尼西亚、缅甸、塞尔维亚、新加坡、沙特阿拉伯等国签订了文化遗产合作文件；中国、哈萨克斯坦、吉尔吉斯斯坦“丝绸之路：长安—天山廊道的路网”联合申遗成功。这些基于文化遗产的合作为日后相关项目的旅游开发奠定了坚实的基础。

3、客源互荐

旅游市场的合作方式还体现在共享市场信息方面。通过双向或多向互介会，客源国旅游企业可以为游客提供更多有针对性的定制化产品，在不同的细分市场和客源人群中深耕；目的地企业可以更加精准地了解游客的需求和偏好，对自身旅游资源进行更为高效的整合与呈现。客源互荐是快速实现旅游市场扩张的有效方式，各国都在积极把握展现自我旅游资源的机会，以期更加高效的拓展客源市场。

2018年，东盟各国绝大多数的省份、城市已在中国北京、上海、广州、厦门、南宁、桂林等地与当地旅游部门开展旅游联合宣传，共同推介本国旅游目的地。2019年，上海与布达佩斯、金边、曼谷、清迈、大马尼拉和全罗南道签约共建“一带一路”友好城市文旅联合推广网络，推动成员城市旅游企业间的合作；乌兹别克斯坦2019年参与了50多场国际旅游展会，在国际舞台上积极推介自身旅游资源，以宣传本国旅游特色。中国湖南省依托湖南国际文化旅游节、中俄红色旅游合作交流系列活动和张家界国际乡村音乐节等国际文化旅游节会平台，加强双向宣传推介。中国贵州省通过与东南亚部分国家的旅游管理部门建立联系，进行客源互送和产品推广等活动，现已取得了初步成绩。

4、市场便利化

随着旅游市场现代化进程的加快，各国依靠现代科技，逐步实现了跨国旅行流程的简化和效率的提升。中国与“一带一路”沿线国家在签证、通关、物流、购物退税等政策安排方面，便利化程度逐步提高，惠及双方广大旅游者。

边境旅游异地办证业务是中国与“一带一路”国家携手推进旅游便利化的缩影。广西、云南、黑龙江省内的多地可以异地办理边境旅游通行证，这一政策推动相关省市旅游产业加快发展，促进商品流通和旅游市场繁荣。跨境购物在出境游消费市场中占据大额比重，是各国外汇收入的主要来源之一。便捷的购物退税和免税政策，让游客不仅能装满“口袋子”，还能少花“钱袋子”，为各国在入境游消费市场中获取更多的市场份额提供支持。从2018年6月1日起，马来西亚全国的消费税从6%调降到0%，这意味着各国游客前往马来西亚购物将获得更为低廉的价格，也无疑将为马来西亚的入境消费市场注入一剂强心剂。2018年11月，阿联酋也实施了游客增值税退税计划，意在提升本国的旅游吸引力和竞争力。俄罗斯同样实行了退税政策，以刺激俄罗斯零售业的复苏，对国际游客而言，最高可享受18%的增值税退税。

第三章 “一带一路”旅游投资合作

邹统钎 丁奕文 常东芳

一、“一带一路”旅游投资合作概况

近年来，“一带一路”旅游产业国际合作不断增强，中国文化和旅游部自2018年开始就积极推动“一带一路”国际合作重点项目的建设。目前“一带一路”沿线国家旅游规模约占全球旅游的70%左右，中国和其沿线国家双向旅游交流超过6000万人次，“一带一路”沿线已成为世界旅游的热点区域。受新冠肺炎疫



图 3-1 受疫情影响“一带一路”沿线各国旅游投资变化

数据来源：欧睿旅游数据库、文化和旅游部官网“Gross Income from Investment in all countries”

疫情影响，2020 年全球入境游客总人次降至 3.51 亿人次，同比骤减 74%；2020 年全球旅游总收入下降至 2.92 万亿美元，损失 1.3 万亿美元，全球旅游业受到严重冲击。旅游投资收入方面，“一带一路”沿线中东欧旅游市场降幅最大，除匈牙利以外，其他国家 2020 年旅游投资总收入均有不同程度的下降；西亚地区和东盟国家，西亚地区降幅在 7% 至 8% 之间，东盟国家增减幅波动大致相近，但新加坡旅游投资收入同比减少 14.81%，受疫情影响较大；中亚、南亚及独联体国家相较于其他市场降幅较小。

从细分行业分析旅游投资市场，可以发现住宿和餐饮业投资规模萎缩，尤其涉及重资产的酒店业资产负债率较高，在疫情冲击下行业加速出清，集中度或将进一步提升；主题公园行业竞争加剧，疫情迫使部分主题公园转向独资、合资与授权多种模式并行的轻资产模式；邮轮业受到前所未有的冲击，投资者撤离导致多家邮轮公司市值大幅缩水，跌幅达到 70%，显著高于其他运营行业；全球航空业呈现低迷态势，各地复苏差异明显，航空公司面临裁员降薪的处境；OTA 行业主动转型智能化趋势明显，部分公司通过寻求差异化发展抓住下沉市场的机会，整体恢复较快。

二、“一带一路”旅游投资合作特征

（一）对“陆上丝绸之路”沿线国家的投资增速提升

初期，由于东南亚地区与我国空间临近、文化相似，便捷的交通、独特的旅游资源以及庞大的旅游经济规模，使其成为我国在“一带一路”沿线旅游投资的聚集区，中国对“一带一路”沿线国家的旅游投资呈现“海强陆弱、东热西冷”的格局。而近三年来，中国游客赴欧洲旅游人数不断上升，其增速最快超过 20%，增量主要体现在“一带一路”的沿线国家摩洛哥、克罗地亚、匈牙利等目的地。与此同时，随着乌兹别克斯坦和哈萨克斯坦等中亚国家在签证政策、交通设施、卫生保障各方面不断改进，中外双方深入探讨以“旅游投资与区域发展”为主题

图 3-2 “一带一路”沿线国家外国直接投资存量
数据来源：欧睿旅游数据库” Foreign Direct Investment
Inward Stocks in all countries”

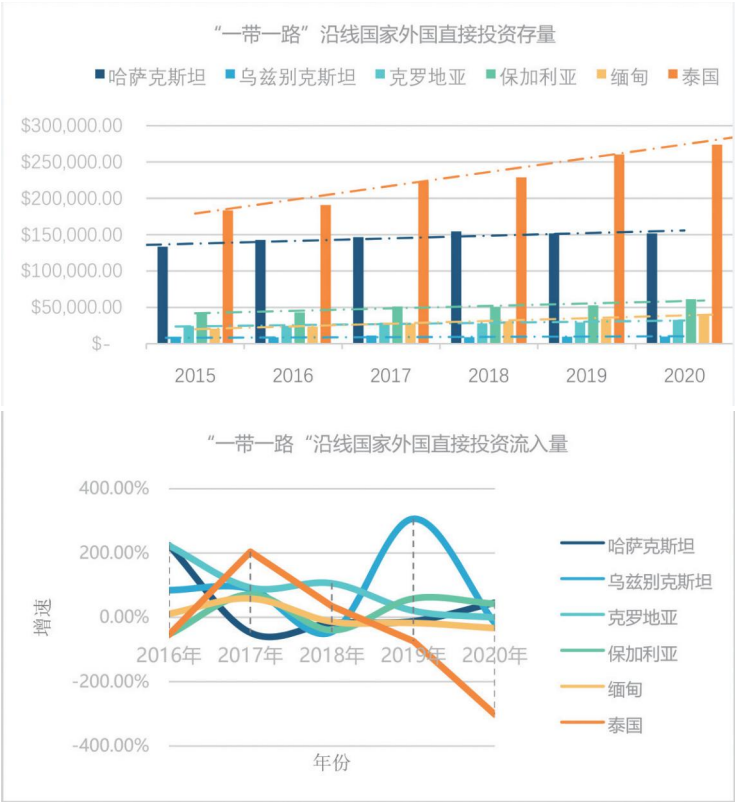


图 3-3 “一带一路”投资存
量与流量变化
数据来源：欧睿旅游数据
库” Foreign Direct Investment
Inflows in all countries”

的交流合作问题，积极推动并举办了“丝路旅游”国际旅游展览会和世界旅游城市联合会，进一步营造了良好的旅游贸易环境，旅游购物、文化交流、金融服务、旅游康养等业态也吸引到各国旅游投资者的关注。

“一带一路”旅游投资活动与“一带一路”旅游目的地热度在空间上紧密相联，总体上看，东南亚地区仍然是“一带一路”沿线旅游投资的聚集区，但自 2018 年以来相关企业不断加速在中亚区域以及中东欧区域的投资合作，“陆上丝绸之路”的旅游企业投资项目明显增多。

（二）投资领域从传统旅游业态向新业态转变

一直以来，“一带一路”沿线的中国旅游投资主要聚焦于饭店、旅行社、餐饮等旅游领域，包括旅游管理与咨询、签证业务、免税品、餐饮管理和投资等。但自 2017 年以来，房地产、酒店等行业的境外投资活动受到了管控限制，2018 年，

酒店被列入《境外投资敏感行业目录》，“一带一路”旅游投资出现了明显的分化，酒店、餐饮等无技术门槛、无产业背景要求、类金融化的旅游投资领域出现明显停滞，而能够促进产业与消费升级的新型业态开始受到持续关注。一些投资风格“激进”的巨头公司，如万达、海航、安邦等也试图抛售海外的房地产和酒店项目，转而打造文化旅游园区、航空旅游等新兴产业。

据 2020 年中国文旅部发布的“一带一路”文化产业和旅游产业国际合作重点项目名单分析，新项目的投资方向涉及数字文旅、主题休闲、旅游演艺、文化装备等多个行业领域，文旅部也将从投融资、宣传推介、信息服务、人员培训等方面对这些项目给予支持，并为这些项目争取多渠道的扶持政策，搭建多元化的合作桥梁，促进项目落地实施。

表 3-1 文化和旅游部 2020 年“一带一路”文化产业和旅游产业
国际合作重点合作项目名单（节选）

序号	报送地区	项目名称	申报单位
1	北京	面向“一带一路”沿线国家的文化和旅游合作信息服务平台项目	中国经济信息社有限公司
2	北京	“数字奥林匹亚”古奥林匹亚遗址数字化推广项目	北京清城睿现数字科技研究院有限公司
3	河北	“发现柬埔寨”文创合作研发项目	廊坊市壹佰剧院管理服务有限责任公司
4	上海	“创意双城 匠心造物”手工艺品展销服务	上海创意城市科技发展有限公司
5	上海	上海民族乐团《共同家园》俄罗斯商演	上海民族乐团
6	江苏	“百工造物”文化创意设计合作研发	江苏百工造物文化科技有限公司

接上表

7	江苏	肯尼亚生态文化 艺术工程项目	爱涛文化集团有限公司
8	江西	面向“一带一路”沿线国家 和地区的陶瓷文创产品设计 研发与推广	景德镇陶瓷大学
9	湖南	面向阿拉伯国家的艺术旅游 综合服务平台	天舟文化股份有限公司
10	湖南	面向“一带一路”沿线国家 的文化和旅游产业国际合作 综合运营平台	湖南山猫吉咪传媒股份 有限公司
11	湖南	肯尼亚中非艺术长廊	湖南河村农业科技发 展有限公司
12	广东	深圳文博会·云上文博会· “一带一路国际馆”	深圳国际文化产业博览交 易有限公司
13	广西	多语种旅游信息推介平台	桂林中国国际旅行社有限 责任公司
14	广西	面向“一带一路”沿线国家 的旅游资源服务支持平台	桂林唐朝国际旅行社 有限责任公司
15	四川	面向“一带一路”沿线国家 的彩灯艺术创意设计推广	自贡海天文化股份有限公司
16	四川	成都“一带一路”国际艺术 中心	成都香颂文化传播有限公司
17	四川	《吴哥王朝》大型文化旅游 综合体	德阳美忆文化旅游发展投 资有限公司
18	四川	“四川礼物”海外营销推广	成都绿舟文化旅游投资管 理有限公司
19	贵州	国风音乐“一带一路”沿线 国家和地区巡演	贵州新湃传媒有限公司

接上表

20	云南	老挝摩丁经济特区全域旅游项目	云南景兰文化旅游股份有限公司
21	新疆	面向“一带一路”沿线国家的儿童育乐数字文旅共享平台	新疆华特信息网络股份有限公司
22	新疆	迪拜·丝路演艺文化产业园	新疆丝路龙田控股集团有限公司
23	新疆	“文游丝路”多语种手机APP应用及研究	乌鲁木齐一心悦读文化科技有限公司
24	—	中国风格数字艺术展示项目	上海国际文化装备产业园管理(集团)有限公司
25	—	“丝路数字文旅”营销推广系列活动	中国文化旅游行业协会
26	—	“潮起东方艺路同行”文化和旅游产业国际合作项目	中国东方演艺集团有限公司
27	—	面向“一带一路”沿线国家的文化和旅游国际营销与传播调查	中国旅游报社
28	—	面向“一带一路”沿线国家的文化和旅游营销服务	北京兴旅国际传媒有限公司

数据来源：文化和旅游部官网

(三) 非典型旅游企业和民营企业投资占比提升

近年来，社会资本跨界投资热情高涨，“一带一路”旅游投资主体不仅包含了港中旅、中国旅游集团（国旅）等以旅游业为主营业务的典型企业，诸如中国城市建设控股集团、中国港湾工程有限责任公司等国有企业，以及一些新兴文创企业也加入到对外旅游投资的队伍之中。这些非典型旅游企业能够为旅游主营业务提供配套的辅助性服务，推进直接投资和承包工程合作规模进一步扩大，同时为国际旅游市场注入新的生机与活力。同时，民营企业在“一带一路”旅游投资企业中占比逐渐提升，锦江集团、万达集团、华侨城集团等企业的投资实力、跨国经营水平显著

增强，并在创新旅游投资业态、布局大旅游生态圈等国际化战略中发挥了重要作用。

（四）采用结构股权投资与非股权投资双向进入模式

我国“一带一路”旅游投资在初期多采用私募股权投资的方式，以东南亚的经济型饭店投资和在线旅游投资为代表，国内企业通过股权并购拥有较强的自主性，并且能够快速占领东道国市场，但在经济、管理以及文化层面存在较高的风险，同时本土市场份额的迅速扩张也可能导致发展后劲不足、负债过重，最终失去竞争优势。“十四五”时期，以开放特许经营权为策略的大型并购、战略合作以及旅游电子商务投资、管理输出、旅游产业园投资等形式，将成为跨境旅游投资方式的新选择，这对于我国投资企业增强“一带一路”旅游市场调配能力、实现高质量的市场开拓和供给侧构建具有重要意义。

（五）外交关系影响对外投资的区位选择

“一带一路”沿线国家社会形态多元，与我国的双边外交关系存在较大波动性，我国对外旅游投资的区位选择也受其影响。如2016年10月杜特尔特总统访华以来，中菲关系经历了转圜、巩固、提升三个阶段，两国在旅游基础设施投资与旅游交通领域的合作也因此呈现出积极向好的态势。目前，中国和东盟的睦邻友好合作关系步入新阶段。随着RCEP正式签署，中国与东盟十国之间的投资自由化水平逐渐提升，有利于促进区域内的经济发展和区域一体化的形成，从而推动建立中国—东盟双边、多边文化旅游合作机制。这说明东道国与周边区域的双边及多边外交关系对于我国选择旅游投资区位具有重要影响。

三、“一带一路”旅游投资风险

（一）国际政治与安全形势动荡复杂，风险叠加

参与“一带一路”旅游投资建设的目标国家大多位于东南亚、中亚、西

亚等相对落后的地区，这些国家政治环境复杂、政府透明度亟待提高，存在政策变动频繁、外部势力干预、社会转型等政治风险，还有暴力恐怖主义、民族分裂主义、宗教极端主义带来的安全问题。随着全球经济环境的恶化，这些在形势向好时得到缓解的风险开始释放，对于投资企业而言将产生较大的不确定性。与此同时，在“逆全球化”浪潮下，单边主义及贸易保护主义有所抬头，中美经贸摩擦等贸易争端对中国外向型民营企业的经营产生较大压力。美国通过推动“经济繁荣网络”计划，旨在从地缘政治上分裂肢解“一带一路”，加剧国家间经济脱钩，这无疑会对推进“一带一路”国际投资合作产生多方面的深重影响。

（二）东道国信用评级下调，债务违约风险增加

根据疫情对各国经济和财政状况的影响，国际信用评级公司已经对部分“一带一路”沿线国家的主权评级进行了降级，金融市场中主权债务的交易价格也显现出一些国家的债务违约率在大幅上升，下表是世界大型评级公司标普对“一带一路”沿线国家当前的评级情况。在 66 个国家中（包括中国），7 个国家信用较好在 AAA 至 AA- 级（最高等投资级），18 个国家的主权评级在 A+ 至 BBB- 级（投资级），41 个国家的信用评级在 BB+ 级以下（即非投资级）或者没有标普评级。其中，黎巴嫩从 CCC 级被下调至 SD（选择性违约），印度、科威特、斯洛伐克和斯里兰卡都被下调了一个评级。

这主要是由于各国针对疫情防控采取的管制措施导致部分项目宣告暂停，项目收入减少，东道国政府财政赤字增加，项目贷款支付、投资回收和承包工程应收账款回收面临困难。此外，一些项目尤其是非洲的项目还受到东道国的货币管控，不能如期将利润和收入兑换和汇出，或者面临进行利润再投资的困扰。从旅游业与宏观经济的互动联系来看，需求侧的市场基础是旅游业复苏的必要条件，未来旅游业的重塑前景与各国宏观经济的韧性和稳定性密切相关。

表 3-2 “一带一路”沿线国家标普评级

标普评级	“一带一路”国家数量	国家名称
AAA	1	新加坡
AA-	6	以色列、卡塔尔、捷克、斯洛文尼亚、爱沙尼亚、科威特
A+	4	中国、拉脱维亚、斯洛伐克、立陶宛
A-	3	沙特阿拉伯、波兰、马来西亚
BBB+	2	泰国、菲律宾
BBB	3	保加利亚、匈牙利、印尼
BBB-	6	俄罗斯、克罗地亚、印度、哈萨克斯坦、塞浦路斯、罗马尼亚
BB+	2	塞尔维亚、阿塞拜疆
BB	2	格鲁吉亚、越南
BB-	4	孟加拉、希腊、阿曼、马其顿
B+	5	土耳其、巴林、约旦、阿尔巴尼亚、黑山
B	5	乌克兰、埃及、波黑、白俄罗斯、蒙古
B-	3	伊拉克、巴基斯坦、斯里兰卡
NR	1	柬埔寨
SD	1	黎巴嫩
	18	不丹、乌兹别克斯坦、也门、亚美尼亚、伊朗、叙利亚、吉尔吉斯斯坦、土库曼斯坦、塔吉克斯坦、尼泊尔、巴勒斯坦、摩尔多瓦、文莱、缅甸、老挝、阿富汗、阿联酋、马尔代夫
总数	66	

数据来源：Bloomberg

（三）法律信息不对称，产生投资合规风险

“一带一路”沿线国家大多属于新兴经济体和发展中国家，在基础设施、贸易投资等领域的法律法规仍不完善，并且由于国家法律标准的统一性问题，投资企业经常面临项目合规、人权、税收、知识产权方面的制裁风险。这主要表现在：很多企业由于短期内缺乏对东道国法律的了解以及适应性，被当地的不法商家利用法律漏洞骗取财物，导致投资企业无法追诉。

同时有些国家的司法环境较差、社会契约意识薄弱，致使合资合作伙伴可能存在重大诉讼、诉讼威胁或重大法律瑕疵，但限于调查的真实性与透明度，投资方不能及时发现标的项目或合作伙伴潜藏的法律风险，进而影响后续业务开展。

（四）全球疫情存在很大不确定性，对复苏构成风险

席卷全球的新冠肺炎疫情对全球产业链、价值链和供应链造成巨大冲击，世界经济下行的压力不断加大，同时也给全球旅游业带来新的危机和挑战。世界旅游组织（UNWTO）的最新数据表明，2020年全球约三分之一的旅游目的地对国际游客“完全关闭”；约三分之一的旅游目的地施行管控措施；国际游客同比减少10亿人次，降幅约74%。

受疫苗接种进度加快和多国政策提振影响，全球旅游业显露复苏迹象，但仍存在疫情反弹及持续传播等不确定性因素，各国政府可能延续甚至加强对入境管制的防控措施。总体上看，新冠疫情对“一带一路”旅游投资的影响主要体现：①投资项目的有关人员、设备物资等可能无法顺利入境，从而影响对外投资项目的考察、建设和前期运营，一些意向性的旅游投资项目被迫取消，部分在建项目由于施工人员不足、物资短缺导致工期延长甚至停工。②疫情导致全球金融市场处于不稳定状态，汇率与市场风险情绪联动，海外投资者需要面临汇率、利率的剧烈波动。③疫情加剧了旅游企业和旅游市场的竞争，单一旅游经营模式下灵活性差、抗风险性弱等缺点成倍放大，暴露出景区收益低、酒店微利、餐饮亏损等各种问题。与此同时，疫情加速了一些未来增长趋势的发展，譬如旅游业数字化、线上化领域。

四、“一带一路”旅游投资合作的建议分析

（一）东道国——全方位优化投资软环境

充分利用中国与东盟、中亚、欧盟等地区的战略合作框架协议，在原有合作机制的基础上，继续深化旅游合作的内容，与更多国家缔结互免签证协定，达成合作共识；加强“一带一路”旅游投资大数据平台建设，对沿线国家的社会、经济环境以及投资风险进行国别分析与预测；加快发展金融保险、信息服务及相关法律、财务、技术等咨询服务机构，为企业提供顶级投资咨询服务，通过制定本土化经营策略实现风险转移控制；推出针对全球旅游业复苏的政策举措，如数字旅行通行证、国际综合旅游基金、游客出行指南等。

（二）投资者母国——开发旅游产业链枢纽

1. 采用线上与线下协同运营模式

一方面，在后疫情时代，投资企业应借助新加坡、印度在信息技术产业的优势以及马来西亚的多媒体超级走廊优惠政策，重点开展在线旅游投资，充分利用渠道与网络优势发挥旅游产业链的枢纽功能，将5G、人工智能等新技术与客源市场辐射到“一带一路”沿线，推进旅游服务便利化并增强对旅游市场的控制力。同时，各国可以利用社交媒体发布宣传视频，通过在线和移动应用程序举办国际旅游展和旅游文化周等系列线上活动，促进文化交流互鉴。

另一方面，旅游业在泰国、柬埔寨、尼泊尔等国为支柱型产业，这些国家也是“一带一路”沿线的热门旅游目的地，其劳动力成本低、度假旅游资源丰富。面对旅游产业复苏以及经营环境的变化，应在这些国家的重点城市打造与投资多片区融合、体系化的旅游IP，以度假群落、康养休闲、文化创意、旅游演艺、主题商业等产业类型建设全能配套中心。

2. 充分发挥旅游产业枢纽的“聚合效应”

中东地区的巴林、阿联酋等国是极具战略位置优势的全球航空中心，其区域商流、客流网络体系健全、经济发达，旅游基础设施建设完备，因政府实行低关税政策，云集各类世界名牌产品，同时本国旅游商品也极具地域特色。迪拜 2020 年世博会(推迟至 2021 年举办)是自疫情以来规模最大的全球盛会，应以此为契机，开展从会展策划到会展管理的全过程投资以及购物娱乐投资，以产业园形式在产业链以及地理位置上发展旅游枢纽经济，着力提升产业集聚辐射能级，构建区域会展与购物娱乐网络。

3. 国家之间——进一步完善第三方旅游市场合作机制

第三方市场合作是高质量共建“一带一路”的重要方向。“一带一路”沿线国家通过与发达国家在第三国开展合作，有利于引导发达国家参与“一带一路”建设，降低企业进入部分“一带一路”沿线国家的投资风险，消减少数国外人士对“一带一路”项目透明度、资金来源、投资回报的疑虑。截至目前，中国已与法国、意大利等 14 个国家建立了第三方市场合作机制，通过举办论坛等形式共同为企业搭建合作平台、提供公共服务。中国企业与法国 PVCP 集团，以及与意大利 Gartour、Neos 航空、罗马机场等众多旅行服务商开始从策略性的市场合作走向战略性的产业合作。中国与新加坡也建立了工作小组，2020 年 11 月，新加坡旅游局与携程集团签署了三年战略合作备忘录，在旅行营销、产品、大数据等领域加深交流合作。

五、投资合作经典案例

伴随着“一带一路”倡议逐步落实，中企逐渐在多个方面扩大了对外投资的脚步，主要体现在以下几个方面：

（一）酒店投资

1. 聚焦首都中心区位，打造高星级酒店

中企在对外酒店投资大多选址在该国首都中心区进行布局，多为打造高星级酒店。酒店内多会提供中文信息、中式菜肴、中文服务等，作为中国文化的海外延伸媒介，除此之外也是中国同“一带一路”国家文化互动的体现。如白俄罗斯明斯克北京饭店、柬埔寨金边绿地铂瑞酒店、仰光司雷香格里拉大酒店、仰光半岛酒店等。以白俄罗斯位于首都明斯克的北京饭店为例，该酒店于2012年由北京住总集团等承建，历时两年竣工，该酒店借助提炼中白两国文化的特征元素，在建筑的整体定位上兼顾不同文化的相互认同。主要元素采用了传统中式建筑中的坡屋顶、白墙灰瓦，这同样契合白俄罗斯人喜爱白色的民族传统，在细节上抽象的表达了马头墙等中式传统建筑元素，在立体表现上则体现了中国水墨画中黑白灰的独特意境，并加以少许中国红和当地白桦木的颜色。这个酒店建成后作为2014年明斯克承办世界冰球锦标赛的官方酒店之一亮相世界。

2. 产业转型升级，“轻资产化”成为热潮

围绕“一带一路”倡议，轻资产已成为酒店、地产行业的发展主旋律。部分企业在进行酒店投资时转型升级，通过轻资产化等创新模式推进企业优势产业海外拓展。2014年，远洲集团决定将发展重心从房地产转向轻资产的酒店管理输出。目前共拥有4个定位不同的品牌，阿纳迪、远洲酒店、逸廷、庐境，且计划5年新增100家酒店。2015年，宝龙地产成立了新酒店集团，并确定了着重以轻资产的方式，采取租赁、加盟以及输出管理模式，发展自有酒店品牌。此后，宝龙相继推出了自主艺术连锁酒店品牌与矩阵，豪华的艺珺品牌，高端全服务的艺悦精选以及中端有限服务的艺悦。2016年，万达酒店迈出了轻资产输出的第一步。万达酒店及度假村品牌成功输出首个项目，五指山百城万达嘉华酒店^①。绿地集团通过不断推进“轻资产”输出模式，与不同的酒店达成品牌管理输出合作

^① https://www.xianjichina.com/news/details_272782.html

协议。自 2019 年 3 月以来，绿地集团先后与泰国暹罗地产、新加坡德伟地产集团、BNR 亚洲合作，拓展泰国、英国、日本等地逾 10 家意向酒店。6 月，绿地就澳洲黄金海岸酒店群、斯里兰卡科伦坡铂瑞酒店、泰国曼谷铂瑞酒店、日本大阪铂派酒店等 12 家海外酒店达成品牌管理输出合作协议。

3. 特许经营与租赁经营的带入——OYO

OYO 酒店加盟将特许经营与租赁经营带入我国，使我国迎来一股“OYO”热潮。OYO 酒店由里特什·阿加瓦尔在 2013 年创立，其酒店品牌定位主要是廉价酒店。OYO 酒店的 1.0 模式以轻加盟，即特许经营及租赁经营等方式与单体酒店展开合作，无加盟费与保证金等使得其在中国的市场大幅扩张。截止 2018 年底，与 OYO 酒店签约的酒店便达到 10354 家。

OYO 酒店的疯狂扩张，引得携程、美团等 OTA 平台的警惕，在很长一段时间内，OYO 酒店成为众矢之的，变成多家平台封杀的对象。封杀的同时，携程、美团、同城艺龙等 OTA 也开始学习 OYO 酒店的轻加盟模式，在低线城市整合低星酒店市场，同样免除加盟费、保证金。在这种情况下，OYO 酒店推出 2.0 模式，该模式把以往的合作方式从佣金抽成，转变为向商家提供收益保底、营收超过保底的部分共同分享的模式。2.0 模式让 OYO 与单体酒店业主的关系降到冰点，各地维权的事件不断爆发。为了扭转不利的局面，OYO 推出“共赢宝”，即 3.0 模式。3.0 模式取消了保底机制，沿用了抽佣的模式。但 OYO 在中国的败局至此已成定局。即便如此，OYO 酒店加盟案例仍然是一带一路沿线国家对我国投资的典型案例，推动国内企业效仿更新。

（二）免税服务

1. 中国：建设海南自贸港，聚焦免税配套服务

伴随“一带一路”战略的推进，中国巨大的消费市场的活力进一步被激发，免税店的建设在激发消费活力过程中扮演重要的角色，成为我国、我国企业、以及沿线国家目光的焦点。2020 年 6 月 1 日国家出台了《海南自由贸

易港建设总体方案》，并针对实际状况进行进一步调整，如扩大离岛免税额、扩增免税商品品种、取消单件商品限定等。同一天，中国国旅发布公告称，拟将公司中文名称由“中国国旅股份有限公司”变更为“中国旅游集团中免股份有限公司”，现该名称变更已经国家市场监督管理总局审查通过并核准。该公司发展战略也已调整为聚焦以免税业务为核心的旅游零售业务，并先后与全球逾 300 家世界顶级奢侈品品牌建立了长期的合作关系，向游客提供上千个品种的免税品购物服务，并通过“中国免税”这一品牌，在全国（包括港澳台地区）设立 200 多家免税店。

2. 其他国家：建设跨境自贸区，整合扩增免税店

除此之外，中外合作跨境自由贸易区也成为建设趋势。以世界上首个跨境自由贸易和投资合作区中哈霍尔果斯国际边境合作中心为例，中哈合作中心实行“一线放开、二线管理”的管理模式和“境内关外”的优惠政策，中心内商品免交关税、增值税和消费税，两国公民和第三国公民，无需签证即可凭护照或出入境通行证等有效证件出入合作中心，实现面对面地商贸洽谈和商品交易。而伴随着直航的开通，有些国外企业抓住了这个机遇，捷克的布拉格机场抓住中国的航空公司开通航线的机会，将散落机场各处的免税店，重新整合并扩大到 900 平方米。为多数店面配备会讲中文的导购和中文指示牌，为中国旅客“量身定制”的商品，也摆到了显眼位置。在值机柜台，机场运营方配备了 4 名会讲中文的向导，专门协助往来中国的旅客办理登机手续，机场也开始筹备建设第三条跑道。

（三）景区投资

1. 搭建新支点、新平台

一方面，中企通过对“一带一路”沿线国家的旅游资源和区位进行考察，对其中的优势资源与区位进行投资，进一步扩大中国的对外影响力，构建中国对外投资新支点和新平台。以柬中综合投资开发试验区暨柬埔寨七星海旅游度

假特区项目为例，七星海旅游度假区项目是柬埔寨首个大型滨海旅游项目，位于毗邻西哈努克省和泰国边境的国公省。该项目定位为中国－柬埔寨“互联互通互融”全方位伙伴战略合作投资发展平台，在为柬埔寨国公省带来更多国际游客的同时，构建了中国连接欧亚非“一带一路”战略标杆项目，打造中国企业“走出去”战略在东南亚地区的重要产业基地，成为中国国际产能合作及技术管理服务输出于东南亚的一个重要战略平台，树立“中国－东盟”合作机制成功实践范例和“互通互联战略工程”在柬埔寨的一个次区域经济走廊的成功支点项目。2005年，新加坡外商投资政策发生变化，允许海外公司在境内设立分公司，中国京冶抓住机遇于当年设立了新加坡分公司。依托中国总部的业绩和配置，中国京冶新加坡分公司成立后申请到最高工程资质，这让其成为2010年3月正式对外开放的新加坡圣淘沙环球影城项目的总包。新加坡环球影城项目通过管理创新，在大型主题公园总承包建设领域开创了中冶MCC的国际品牌和先进的管理模式，为中资企业在海外承揽项目打下了坚实基础。

2. 拓展跨境旅游合作区

另一方面，在国家大力推进“一带一路”倡议的背景下，在沿边地区建设跨境旅游合作区的作用更加凸显，它为我国游客提供可轻松体验多国民俗风情的机会，也为国外游客了解我国提供了更直接便捷的方式。以首个跨境旅游合作区中越德天—板约瀑布跨境旅游合作区为例，德天瀑布位于广西崇左市大新县硕龙镇德天村，中国与越南边境处的归春河上游，德天瀑布与紧邻的越南板约瀑布相连，是亚洲第一、世界第四大跨国瀑布，有较高的游览价值。中越两国为了旅游合作区能按计划试运行做了大量的基础工作，双方对各自景区都做了产品的提升。在旅游合作区建成开放后，前来的游客在完成简易通关手续的前提下，可以从中国一侧前往越南一侧观看瀑布，并能在景区两公里范围内的所有景区景点畅游。据中越两国商定的共识，游客在跨境合作区内有着持有护照通过查验通道直接前往越南，以及在未持有护照情况下通过景区大厅办理简易出入证前往越南的两种出入方式，十分便利。在跨境旅游合作区的帮助下，游客可以轻松的实现一日游两国，感受中国与越南不同的民俗风情。

广西已与东盟 8 个国家建立了国际合作园区，包括中国－马来西亚（钦州）和关丹“两国双园”、中国－印尼经贸合作区等，并植入旅游要素推进相关合作；继续推进东兴－芒街、靖西－龙邦等跨境旅游合作区建设；指导防城港市、百色市（靖西、那坡）和崇左市申报设立国家边境旅游试验区，将防城港、崇左两市边境旅游试验区建设成为国家全域旅游示范区的边境版。

云南着力打造中老缅泰边境地区“金四角旅游圈”，并积极推动成立澜沧江－湄公河旅游城市合作联盟，与澜沧江－湄公河流域其他 5 个国家（缅甸、越南、泰国、老挝、柬埔寨）共同拟定了《澜沧江－湄公河旅游城市合作联盟章程》和《澜沧江－湄公河旅游城市合作联盟概念方案》，并在中越河口—老街、中老磨憨—磨丁、中缅瑞丽—木姐先行确定三个区域，试行开展跨境旅游合作区建设。

3. “一带一路”主题公园渐成热点

在主题公园的投资建设上，我国也展现了较大的热情。对外，中国在斯里兰卡投资科伦坡港口城项目，其标志性开发项目包括主题公园、游艇码头等。在对中国国有能源巨头——中国电力建设集团国际工程有限公司建设“马六甲门户”时也对主题公园进行了建设。对内，2020 年 11 月金山区人民政府、英国默林娱乐集团签署协议，丹麦乐高品牌集团和华人文化集团公司成立合资企业，四方一起负责乐高上海度假村的投资和建设，投资额约为 5.5 亿美元。兰州新区拟建“一带一路”主题公园。项目占地 1456 亩，建筑面积共约 35 万平方米。包含：新时代“一带一路”会展中心、“一带一路”万国展园、丝路风情美食街、丝路特色购物中心、主题酒店、“一带一路”主题公园行政办公区、丝路纪念馆、丝路图书馆、丝路游乐园、“一带一路”中华展园等。

（四）文化演出

1. 汇集交织传统精粹

一方面，文艺演出节目在符合“一带一路”沿线国家的文化背景下，融合中

外原有各自的文化精粹，囊括各国各具特色的文化符号。以四川省永久性落地项目《吴哥王朝》为例，该项目以大型史诗舞台剧《吴哥王朝》为核心，融现代化大剧院、水上世界、美食天地、柬埔寨民俗风情街等多种业态为一体。其中，史诗舞台剧《吴哥王朝》，融合了柬埔寨非物质文化遗产“仙女舞”和中国多项非物质文化遗产，汇聚两国文艺、杂技、舞蹈、音乐、舞美、服装等众多艺术家的创作灵感。描绘吴哥时期柬埔寨的自然风光和人文风貌。

2. 发掘融合新型作品

另一方面，有的作品通过发掘各国民族的传统文化、传统乐器、传统舞蹈之间的相同与不同，通过巧妙的交织、融合，给观众带来新奇的、全然不同的现场体验。以上海民族乐团的《共同家园》为例，主创团队通过对竹笛、二胡、琵琶等观众熟悉的中国民族乐器以及来自五大洲的世界民族乐器的构造特点、演奏方式的摸索，创造出如《踏浪》、《相遇》等多元交融的演出作品。目前，上海民族乐团《共同家园》的俄罗斯商演已被纳入我国一带一路重点建设项目。

（五）线上平台

1. 收购原有平台为新枢纽

收购当地的原有线上平台成为许多企业进行海外线上业务拓展的一大选择。伴随着“一带一路”战略的进一步推进，出境游已经成为国人度假的热门选择。在此种背景下，中国企业除了在线下酒店、景区、演出等方面的投资之外，更加大了线上的业务拓展，目前主要分为收购当地原有平台作为枢纽公司和自主拓展新平台两种。收购原有网站方面，以驴妈妈收购菲律宾长滩岛最大中文服务站为例，新收购的公司改名为长滩岛中文游客中心。该中心不仅仅提供潜水、摩托艇、出海等当地玩乐产品中文咨询服务，更将领先的景区快速通关技术引入当地，未来通过该公司服务的中国游客只需带手机便可玩转长滩岛，在长滩岛仍可像国内一样手机扫码支付，以人民币结算，无需提前兑换当地货币，省去了兑换手续费。

2. 自主拓展新平台

自主搭建、拓展新的平台同样成为不少企业的一大选择。据文化和旅游部发布的《2020年“一带一路”国际合作重点项目公示》可知，在立项的45个项目中，有9个属于旅游平台搭建，涵盖面向“一带一路”沿线国家的数字文化传播、儿童育乐数字文旅、艺术旅游、文化和旅游产业国际合作、文旅信息服务、文化艺术品交易、旅游信息推介、旅游资源服务等多个领域。

第四章 “一带一路”旅游舆情大数据分析

李 颖

一、“一带一路”旅游的公众关注度

（一）“一带一路”全球关注度自 2015 年起持续走高

世界范围内公众对“一带一路”的关注有着天翻地覆的变化,自 2004 年以来,呈现先增长后降低趋势,2004-2014 年,全球对“一带一路”的关注度较低,自 2015 年开始关注度呈极速上升趋势,到 2019 年达到最高值,后呈现轻微下降趋势。2015 年的大转折,使得全球对“一带一路”的关注逐步提高,这期间离不开中国的积极倡议和推动。2013 年 9 月中国国家主席习近平提出建设“新丝绸之路经济带”的合作倡议,同年 10 月接着提出“21 世纪海上丝绸之路”的合作倡议。自此,“一带一路”倡议被正式提出并积极推动。2015 年 3 月 28 日,国家发展改革委、外交部、商务部联合发布了《推动共建丝绸之路经济带和 21 世纪海上丝绸之路的愿景与行动》。“一带一路”经济区开放后,承包工程项目突破 3000 个。2015 年,中国企业共对“一带一路”相关的 49 个国家进行了直接投资,投资额同比增长 18.2%。2015 年,中国承接“一带一路”相关国家服务外包合同金额 178.3 亿美元,执行金额 121.5 亿美元,同比分别增长 42.6% 和 23.45%。2016 年 6 月底,中欧班列累计开行 1881 列,其中回程 502 列,实现进出口贸易总额 170 亿美元。中国对“一带一路”合作的积极推动,使得全球对“一带一路”的关注度极速提升。

全球范围内,公众对“一带一路”的关注相当广泛,除了部分非洲国家以外,

亚洲、大洋洲、南美洲、北美洲对“一带一路”均保持关注，中国香港、中国澳门、新加坡、缅甸、文莱、蒙古、澳大利亚等是全球对“一带一路”关注度最高的地区。中国“一带一路”倡议在国际公众视野中的地位极高，“一带一路”在全球范围内受到广泛关注，再次印证了中国在推动双多边区域合作，借助既有的古代丝绸之路的历史符号，高举和平发展的旗帜，积极发展与沿线国家的经济合作伙伴关系，共同打造政治互信、经济融合、文化包容的利益共同体、命运共同体和责任共同体过程中所起到的大国担当作用。

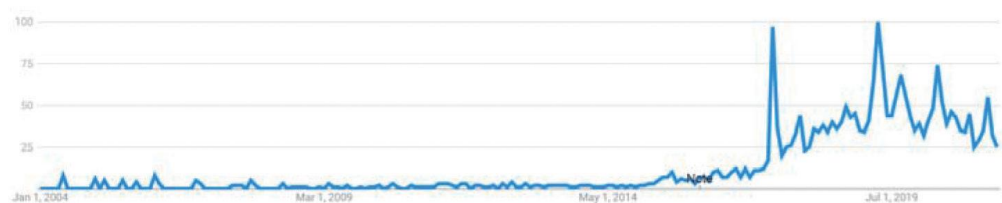


图 4-1 全球对“一带一路”的关注度

资料来源：谷歌趋势



图 4-2 “一带一路”的国际关注

资料来源：谷歌趋势

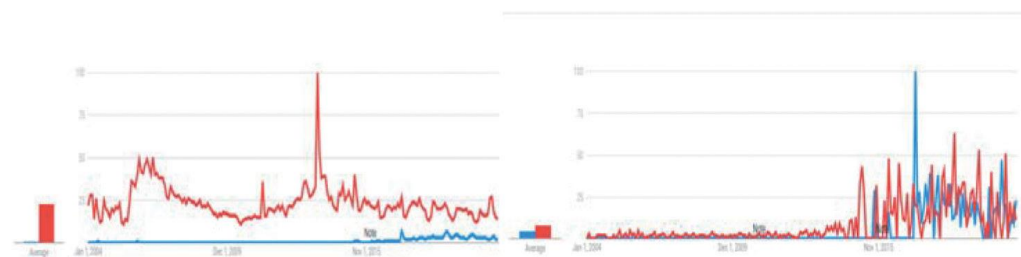


图 4-3 全球公众和中国公众对丝绸之路和“一带一路”的关注

资料来源：谷歌趋势

国内外公众对于古丝绸之路和“一带一路”的关注度存在较大的差别，在中国，公众对丝绸之路和“一带一路”的关注度差别较小，均在 2015 年以后呈现快速增长趋势，这表明中国公众对“一带一路”和丝绸之路的认识和理解程度相当且均较高，两者差别不大。然而，在国际上，公众对丝绸之路的兴趣远远大于“一带一路”，这充分表明全球公众对丝绸之路这一古老的历史事物保有极大地热情，而“一带一路”作为新生的倡议仍需要作出积极的推广和努力，以赢得更多的国际关注，为丝绸之路赋予更多的现实意义和当代价值。

（二）全球公众与中国公众对旅游的关注度走势差别巨大

国内外公众对旅游的关注度也存在较大的差异，世界范围内，公众对旅游的关注度自 2004 年以来呈现持续波动下降的趋势，到 2021 年达到历史最低值。这一趋势不仅与全球经济状况有关，同时还与 COVID-19 疫情的全球大流行存在一定的联系。然而，在全球公众对旅游热度持续下降的背景下，中国公众对旅游的热度趋势却截然相反，中国公众对旅游的关注度自 2014 年以来呈现先升高后平稳的趋势，这也更好的说明，中国公众对全球旅游产业的发展起到正向推动作用，公众对旅游的热情甚至没有过多的受到 COVID-19 疫情的影响，这是中国经济崛起的一大表现，同时也预示着中国将在国际旅游舞台上起到更加积极的作用。



图 4-4 全球公众和中国公众对旅游的关注度

资料来源：谷歌趋势

二、“一带一路”旅游热点

（一）媒体关注度显著受到 COVID-19 疫情的影响

通过对“一带一路”旅游相关的 Google 新闻和 Bing 新闻数据的分析，发现自 2011 年以来媒体对“一带一路”旅游的关注度整体上呈持续上升趋势，且自 2015 年开始关注度提升速度加快，但 2020 年出现了明显的断崖现象，这与 COVID-19 疫情存在极大的联系。2020 年受疫情影响，媒体对“一带一路”旅游，尤其是对旅游的热衷度明显减低，然而，随着疫情在全球范围内逐步得到控制，尤其是对旅游的热衷度明显减低，然而，随着疫情在全球范围内逐步得到控制，尤其是疫情在拥有全球最多人口的中国得到了良好的控制，加之，疫苗的出现和使用，使得全球媒体看到了疫情恢复的曙光，更增强了“一带一路”旅游恢复和发展的信心和动力。

（二）中国在“一带一路”旅游发展中的地位逐步提高

根据媒体数据获得“一带一路”旅游相关词云，“Belt and Road”、“Tourism”、

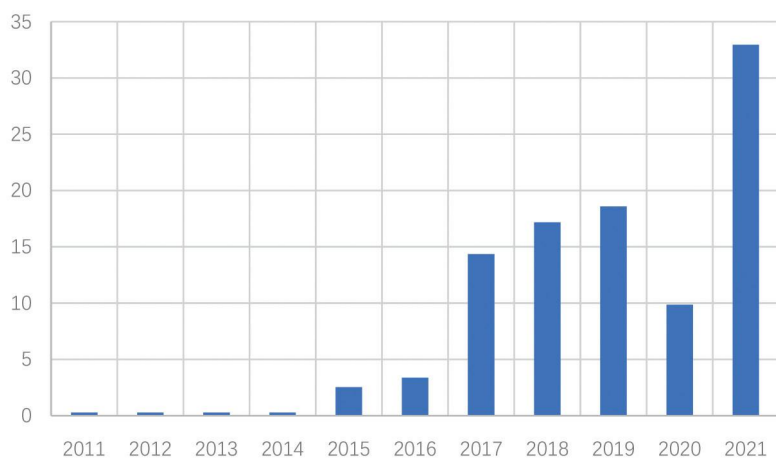


图 4-5 全球媒体“一带一路”旅游关注度占比

数据来源：根据 Google 新闻和 Bing 新闻数据整理



图 4-6 “一带一路”旅游
媒体关注词云
数据来源：根据 Google 新闻和 Bing 新闻数据整理

表 4-1 2011 年以来媒体关注热词变化

年份	2011	2012	2013	2014	2015	2016
热词	Silk Road	Northern	Silk Road	Belt and Road	Tourism	Belt and Road
	Enjoyment	Willow	Tourism	Paving	Belt and Road	Tourism
	Tourism Scenery	Excellent Country Tube	Plenty Keats	Tourism Hawaiian History Authors Dawn Way	Countries China Europe Initiative Silk Road Service Opportunite	Fund Malaysia China
	年份	2017	2018	2019	2020	2021
	Belt and Road	Belt and	Belt and	Belt and	Belt and	Belt and

热词		Road	Road	Road	Road
	Tourism	Tourism	Tourism	Tourism	Tourism
	China	Initiative	China	China	China
	Development	China	Initiative	Culture	Initiative
	Countries	Cooperation	Cooperation	COVID	Silk Road
	Cooperation	Development	Economic	People	Government
	Beijing	Beijing	Economic	Safety	
		Culture	Initiative	Asia	
		Xi Jinping	Contries	Development	
			National	Forum	

数据来源：根据 Google 新闻和 Bing 新闻数据整理

“China”、“Initiative”、“Cooperation”排在前列，充分体现了国际媒体眼中中国在积极推动“一带一路”发展与旅游合作方面的作用。这是对中国在国际舞台上大国担当的重要体现，也是树立中华民族形象的体现。此外，“Economic”、“Investment”、“Culture”、“International”等也是“一带一路”旅游的重要关键词，体现了“一带一路”倡议在经济、发展、文化以及国际合作方面起到的积极作用。

（三）区域合作与发展日益成为“一带一路”旅游关注的重点

自 2011-2021 年间,媒体对“一带一路”旅游的关注逐渐从单纯的旅游发展,向区域发展、经济合作、文化交融方向发展,尤其是经过 COVID-19 疫情的冲击,“一带一路”区域旅游发展与合作更加关注安全健康、政府干预等方面。2014 年以前,“一带一路”更多的以“Silk Road”丝绸之路来呈现,自 2014 年起,“Belt and Road”“一带一路”的概念开始出现并逐步稳固。2014 年以前,“一带一路”旅游更关注“Enjoyment”、“Scenery”、“Excellent”、“Plenty”等旅游资源本身或旅游体验等方面,自 2014 年“一带一路”倡议提出以来,“Fund”、

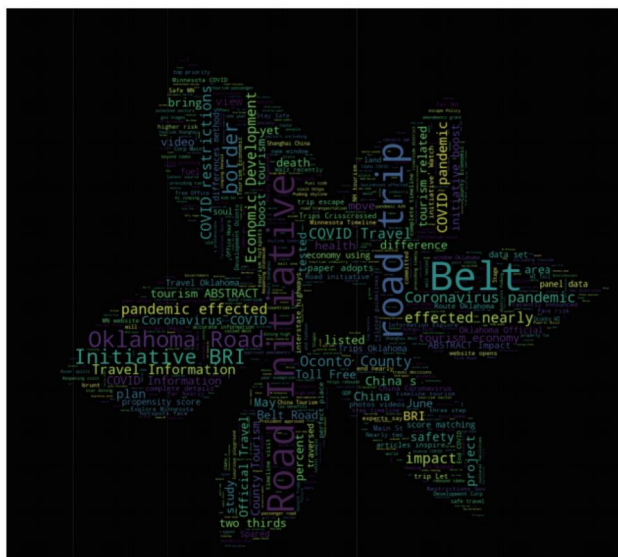


图 4-7 媒体对新冠疫情的关注热点

数据来源：根据 Google 新闻和 Bing 新闻数据整理

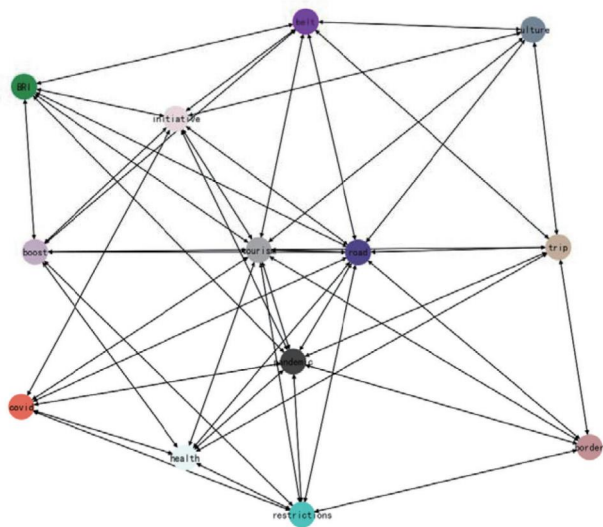


图 4-8 媒体关切之间的联系

数据来源：根据 Google 新闻和 Bing 新闻数据整理

“Initiative”、“Cooperation”、“Economic”、“Development”等区域经
济文化合作得到极大的关注，“一带一路”旅游发展已不仅仅是产业发展，更是促
进区域发展和地区合作的重要载体。值得关注的是，“China”、“Beijing”、“Xi
Jinping”等受到媒体的广泛关注，再次体现了中国在“一带一路”倡议中发挥的
积极而重要的作用。

（四）COVID-19 疫情使得媒体更加关注复兴、健康、地区限制

COVID-19 疫情曾一度减低了媒体对“一带一路”旅游的关注，我们就“一
带一路”旅游受 COVID-19 疫情的冲击进行特别分析，COVID-19 疫情之下，媒
体对于大流行、影响、边界、死亡等的关注更高，体现了疫情之下公众对疫情发
展及其对“一带一路”旅游发展与合作的影响格外关切。

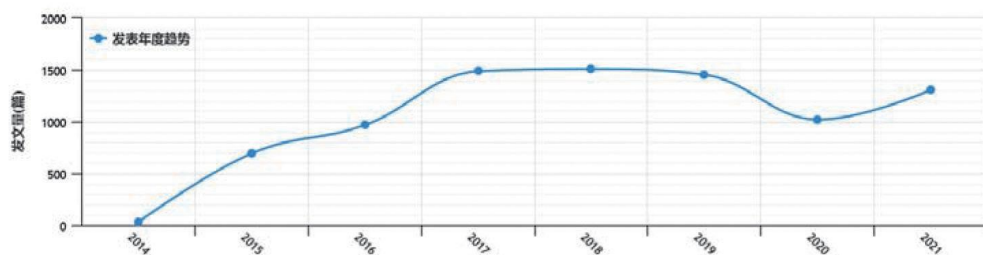


图 4-9 “一带一路”相关主题发文量

资料来源：中国知网

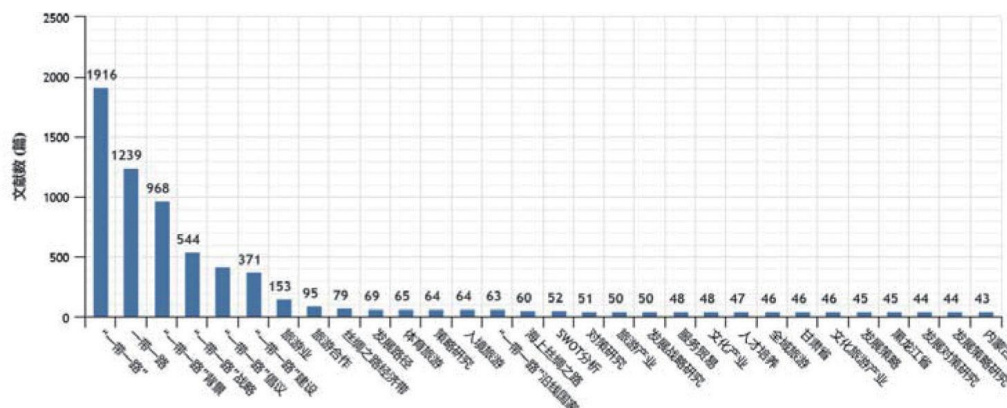


图 4-10 “一带一路”旅游关注的主要主题

资料来源：中国知网

COVID-19 疫情下媒体对“一带一路”、旅游、大流行的全切度极高，其中健康、限制、疫情、复兴等与媒体关切存在密切的联系，而原本媒体关注度较高的文化、游览等在疫情下，与旅游、“一带一路”倡议等的联系明显变得更加疏远，媒体已经将“一带一路”旅游的复兴与发展与疫情、健康、安全等密切联系在一起，媒体的关注层面也发生了相应的变化。

三、“一带一路”旅游的学界关注度

“一带一路”旅游的学界关注度是“一带一路”合作与发展的重要呈现窗口，了解和分析学界对“一带一路”旅游的兴趣和关注，对于明确“一带一路”旅游前沿发展方向具有重要的参考意义和借鉴价值。

中国学界对“一带一路”旅游的相关文献达到 7500 多篇，自 2014 年以来，“一带一路”旅游相关主题的文献发表数量呈先增长后持平趋势，近年来，“一带一路”旅游相关论文发表量保持在每年 1500 篇左右，充分体现了学界对“一带一路”旅游的极大关注。

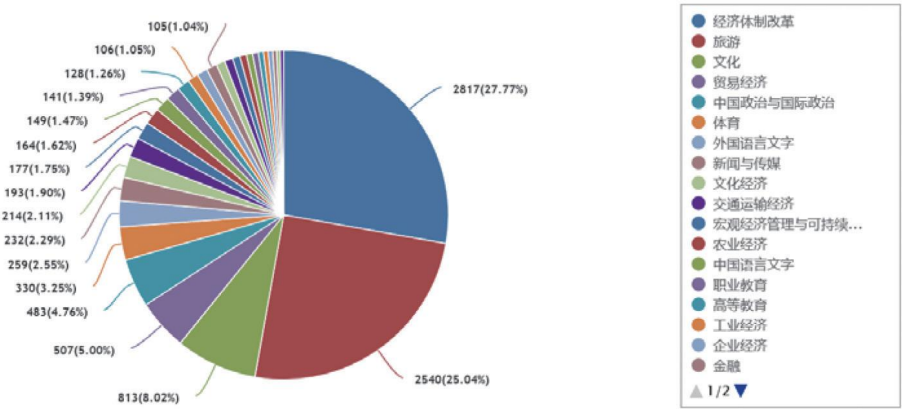


图 4-11 “一带一路”旅游涉及领域

资料来源：中国知网

（一）关注主题：集中在战略、倡议、建设方面

学界对“一带一路”旅游的关注只要体现在“一带一路”倡议、“一带一路”建设、旅游合作、丝绸之路经济带、体育旅游、入境旅游等方面，更加注重“一带一路”战略的发展和对旅游产业、入境旅游的影响，重视策略研究和发展路径研究，旨在积极为“一带一路”旅游发展提供经验借鉴和发展指引。

（二）涉及领域：以经济体制改革、旅游、文化为主

“一带一路”旅游涉及的领域广泛，主要在经济体制改革、旅游、文化、经济贸易、中国政治与国际政治、体育、外国语言文学、新闻与传媒、文化经济、交通运输经济、宏观经济管理、农业经济、职业教育等领域开展积极探讨，其中经济体制改革、旅游、文化领域占比最高分别达 27.77%、25.04%、8.02%。

（三）内部联系复杂而密切

“一带一路”旅游重点关注问题及其网络关系。“一带一路”旅游充分关注文化旅游、人才培养、全域旅游、国际关系等问题，这些问题之间也存在复杂的内部联系，表明“一带一路”旅游实际上是一个庞大的系统，可以解决诸如人才培养、旅游发展、区域发展等地区及国际问题，他们之间联系紧密，充分体现了“一带一路”倡议是作为人类命运共同体建设的重大举措。

四、基于舆论的“一带一路”旅游发展建议

（一）借助丝绸之路加强“一带一路”的国际关注

全球范围内公众对丝绸之路的国际关注远远高于对“一带一路”的关注，借助丝绸之路的国际影响力，强化丝绸之路与“一带一路”的相互关系，以丝绸之路带动“一带一路”的国际曝光度和公众认可度，从而提升“一带一路”的国际关注。

（二）注重有针对性的“一带一路”旅游营销

“一带一路”旅游对于不同年龄、性别、职业的公众的吸引力不同，针对不同的公众群体开展针对性的旅游营销是提升“一带一路”旅游公众兴趣的重要手段。充分利用虚拟现实、人工智能等现代信息技术，与“一带一路”旅游进行深度融合发展，尽可能的吸引年轻一代和女性的关注度和兴趣度。整体上实现“一带一路”旅游的营销效率和准确度的大幅提升。

（三）进一步加强跨区域合作

“一带一路”旅游舆情分析结果中中亚国家的曝光度和关注度相对较低，进一步加强地区和区域合作，充分调动“一带一路”国家共同推动“一带一路”旅游合作的积极性，提升“一带一路”沿线国家对“一带一路”旅游的贡献，真正实现高质量的区域合作和区域发展。

（四）鼓励跨领域合作

“一带一路”旅游涉及到经济、文化、旅游、体育、农业、教育等多个领域，并且各个领域之间的合作和联系紧密，鼓励“一带一路”旅游的跨领域合作对于“一带一路”旅游的全面、高效、高质量发展具有重要的意义和价值。

Report on Development of Tourism Cooperation along Belt and Road

World Tourism Alliance
China Academy of Culture & Tourism of Beijing International Studies
University

Preface

Ever since China presented the Belt and Road Initiative to the public, the Chinese government has been implementing and deepening tourism cooperation with countries along the route of Belt and Road to a further degree. As a result, abundant fruitful accomplishments have been achieved in various aspects, including joint marketing, visa simplification, tourism investment, product development, talent cultivation as well as travel security, etc.

In the aspect of marketing cooperation, more than a dozen of Culture Year, Tourism Year events between China and Central and Eastern Europe, China and ASEAN, as well as China and EU have been held one after another. Tourism cooperation mechanisms, such as the Marketing Union of the Silk Road Tourism, the Promotion Union of the Maritime Silk Road Tourism, and the Alliance of Wanli Tea Ceremony International Tourism, have been actively established, whilst events such as China-ASEAN Expo Tourism Exhibition, Beijing International Tourism Commodities & Tourism Equipment Fair, Ningxia China-Arab States Tour Operators Conference and so on, have been hosted as well.

In the aspect of product development cooperation, key projects of international cooperation in cultural industry and tourism industry along Belt and Road have been implemented annually. Heritage corridor tours of the Silk Road, tours of the Greater Mekong River Basin, and the

tours of the Tumen River Basin have been jointly developed, whilst the Grassland Silk Road, the Buddhist Silk Road, the Desert Silk Road, the Spice Road, the Ancient Tea-Horse Road as well as the Amber Road have also been jointly constructed. In collaboration with 2022 Beijing Winter Olympics, the Ice and Snow Silk Road has been jointly built, whilst several snowy travel core-zones in Northeast, Beijing, Zhangjiakou as well as Xinjiang Uygur Autonomous Region have been actively constructed. In addition, snowy tourism cooperation has been gradually expanded to the countries along the route of the Silk Road Economic Belt as well as the world's key snowy countries and regions.

In the aspect of tourism investment cooperation, investment in the countries along the route of the land Silk Road has been growing rapidly, and the investment fields have been changed from the traditional tourism formats (hotels, real estates, catering, duty-free stores) to the newly-emerging formats (digital culture and tourism, theme recreation, travel performance, cultural equipment), whilst the investment proportion of atypical tourism enterprises and privately-owned enterprises has grown, non-equity investment conspicuously increased and asset-light tendency magnified.

In the aspect of cooperation mechanism and travel facilitation, ever since the Belt and Road Initiative was put forward, the establishment of a series of culture and tourism cooperation mechanisms, such as China-ASEAN, China-Central and Eastern Europe, China-Russia-Mongolia have been promoted to be built one after another, whilst China's tourism offices in Bangkok, Budapest and Astana have been established, and the guidance to complete the construction of China Tourism Experience Center in Paris and Sydney has been offered. Fifty-seven countries along

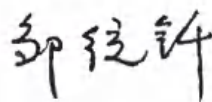
the route have signed mutual agreements of visa exemption with China, whilst 19 agreements or arrangements of visa simplified procedures have been reached with 15 countries.

Starting from the year of 2020, the Belt and Road Initiative has been confronted with the impacts brought about by the COVID-19 epidemic. On one side, all countries have conducted lockdowns and on the other side, inflow has been restricted, flights curbed so that the international tourism has dropped by 74%! Under such a circumstance, China and the countries along the route of Belt and Road have strengthened cooperation in the aspects of epidemic prevention and control, vaccine development and production, etc. In the meanwhile, the communication modes of tourism cooperation have been altered, whilst large numbers of online communications, cloud exhibitions and online trainings have been prosperously developed. The Ministry of Culture and Tourism of the PRC has shown support to China Arts and Entertainment Group Ltd as well as China Culture & Entertainment Industry Association to jointly host the Silk Road Digital Culture and Tourism Industry Cooperation Forum, The Briefing of China Digital Culture and Tourism Industry Projects as well as China Digital Culture and Tourism Production Technology Exhibition, so as to promote the digital tourism cooperation along Belt and Road.

In the year of 2021, The Action Plan of the Fourteenth Five-Year Culture and Tourism Development along Belt and Road was published in China, with focuses upon the following three major missions, namely the improvement of cooperation mechanism and communication platforms and comprehensive enhancement of brand construction level, the promotion of Belt and Road culture and tourism development and construction

of all-round development new pattern, as well as the promotion of regional coordinative development and the completion of elevated level in foreign communication. The details include the following 12 special plans - the practical promotion of culture and tourism communication cooperation along Belt and Road, the solidification plan of platforms, the brand enhancement, the arts boutique creation of the Silk Road, the international cooperation of cultural relics, the enhancement of public culture service, the industry promotion, the enhancement of tourism system construction, the promotion of technological achievements, the cooperation of intangible cultural heritage, the cooperation of market supervision and management as well as the key promotional plans of regional development. Those have strongly guaranteed the tourism cooperation along Belt and Road during the Fourteenth Five-Year Period.

The present report is advocated by the World Tourism Alliance, compiled and written by China Academy of Culture and Tourism of Beijing International Studies University, aiming at making a summary of the development process and future development tendency of tourism cooperation along Belt and Road in recent years. It is expected that the present report should be capable of providing references for the tourism cooperation among countries along the route of Belt and Road. Due to the limited existing documents, the present report is definitely far from perfection. We sincerely look forward to hearing criticism and comments from you all.



Beijing International Studies University

Silk Road International University of Tourism

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Chapter One

Policies for Tourism Cooperation along Belt and Road

By Wu Liyun / Yan Zhixin

1. The Current Situation and Characteristics of China's Policies for Tourism along Belt and Road

The Belt and Road Initiative (BRI, or B&R) is the cooperation initiative to construct the Silk Road Economic Belt and the 21st century Maritime Silk Road coined by President Xi Jinping in September and October 2013 respectively. At the Third Plenary Session of the 18th CPC Central Committee that took place in November 2013, the Belt and Road Initiative was elevated to become a national strategy. Soon after that, policy documents relevant to BRI started to be frequently issued, especially after the year of 2014, when the top-level designs were completed, and the policy documents achieved tremendous development and improvement in terms of quantity, contents and operability both nationally and locally.

1.1 Continuous improvement from top-level designs to specific implementation

As an important way to promote the cooperation along Belt and Road, Several Opinions on Prompting the Reform and Development of the Tourism Industry issued by the State Council in August 2014, mentioned the requirement of strengthening the tourism cooperation between countries along Belt and Road. In December 2014, The General Office of the Central Committee of the Communist Party of China as well as the State Council issued the Strategic Plan for the Construction of the Silk Road Economic Belt and the 21st Century Maritime Silk Road, which successfully transformed the Belt and Road Initiative from a strategy on paper into an actual policy implementation. However, the Plan remains internal and yet to be released. In March 2015, to Promote the Visions and Actions on

Jointly Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road was released, symbolizing that the top-level designs of the Belt and Road Initiative were mostly completed. The contents in the document that deal with the tourism industry cover many aspects, including tourism cooperation, tourism promotion, travel routes, travel products, tourist visas, cruise tours, etc. In August of the same year, the State Council released Several Opinions on Further Progressing Tourism Investment and Consumption, which provides financial support for the construction and improvement of tourism infrastructure and service facilities in the regions along Belt and Road. The Action Plan of Standard Connectivity for the Belt and Road Initiative (2015-2017), the Action Plan of Cultural Development for the Belt and Road Initiative (2016-2020) as well as the Guiding Opinions on Promoting the Construction of Green Belt and Road was released one after another in the following period. They have managed to offer guidance and security for tourism development under the policy for Belt and Road. In addition, in China's Outline of Thirteenth Five-Year Tourism Development and Outline of Fourteenth Five-Year Cultural and Tourism Development, it has also been mentioned that the tourism cooperation along Belt and Road shall be strengthened and that the influence of cultural tourism brands shall be enhanced through several different methods, including holding festive events, introducing reciprocal policies, encouraging tourism investments, etc. In May 2017, The Office of the Steering Group for the Belt and Road Initiative released Building the Belt and Road - Concept, Practice and China's Contribution, which has made a summary of the achievements accomplished by China and countries along the route of Belt and Road in the aspects of tourism promotion and communication.

In June 2017, the Action Plan for the Sports Tourism Development of Belt and Road was issued, which became China's first specialized development policy for tourism along Belt and Road. The Action Plan, which reflects tremendous significance of guidance, has clarified eight actions that shall be taken to support sports tourism. It has also provided a concrete implementation plan for the promotion of tourism industry development. In April 2019, the Office of the Steering Group for the Belt and Road Initiative issued a report titled the Belt and the Road Initiative – Progress, Contributions and Prospects, which has raised strong hope for tourism cooperation between China and the other countries along the route of Belt and Road. Currently, the Action Plan for

Culture and Tourism Development of the Belt and Road of the Ministry of Culture and Tourism (2021-2025) is in the intensive process of compilation. Soon, the policies for Belt and Road tourism are going to focus more upon specific fields, cover wider and more comprehensive industries and display more definite details in contents.

Table 1-1 China' s Tourism-Relevant Policies for Belt and Road

Release Date	Release Department	Policy Document	Tourism Relevant Content
2014-08	The State Council	<i>Several Opinions on Prompting the Reform and Development of the Tourism Industry</i>	With the building of the Silk Road Economic Belt and the 21st Century Maritime Silk Road as the center and the mechanism framework of the following regional and sub-regional cooperation projects as the context, namely the ASEAN-Mekong River Basin Development Cooperation, Greater Mekong Sub-regional Economic Cooperation, Central Asia Regional Economic Cooperation, Tumen River Regional Development Cooperation, Bangladesh-China-India-Myanmar Economic Corridor, China-Pakistan Economic Corridors, outbound and inbound policies conducive to border tourism shall
			be adopted whilst the regional tourism cooperation between China and Southeast Asia, South Asia, Central Asia, Northeast Asia, as well as Central and Eastern Europe shall be propelled. In the meanwhile, China-Africa tourism cooperation shall be actively promoted, whilst the bilateral tourism cooperation shall be strengthened, and events of tourism year with relevant countries shall be properly organized.

2014-12	The General Office of the Central Committee of the Communist Party of China / the State Council	<i>the Strategic Plan for the Construction of the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	To be released
2015-03	National Development and Reform Commission Ministry of Foreign Affairs of the PRC Ministry of Commerce of PRC	<i>to Promote the Visions and Actions on Jointly Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	Tourism cooperation shall be strengthened, scale expanded. Events such as tourism promotion week as well as publicity month shall be mutually organized, so that the international travel routes of boutiques as well as tourism products with the characteristics of the Silk Road are jointly created. The level of visa facilitation for tourists from the countries along the route shall also be enhanced. The cruise tours cooperation of the 21st Century Maritime Silk Road shall be propelled as well. In addition, the events of sports exchange shall be actively performed and full support shall be shown to the countries along the route in their bidding process for major international sports events.
2015-08	the State Council	<i>Several Opinions on Further Promoting Tourism Investment and Consumption</i>	People's governments at all levels shall intensify the supporting forces for the development of national key travel scenic sites, the key travel routes including the route of B&R, the route of the economic regions of the Yangtze River and the ecological tourism in densely contiguous areas, as well as the tourism infrastructures and public service facilities in poverty- alleviated villages in rural areas, so that there are the diversified travels that can enrich people's life and boost economic development alongside.

Connect the table

2015-10	The Office of the Steering Group for the Belt and Road Initiative	<i>The Action Plan of Standard Connectivity for the Belt and Road Initiative (2015-2017)</i>	Full support shall be given to different regions where their geographical, linguistic cultures as well as featured industries merits shall be taken advantages of, so that the cooperation of feature standardization in all domains can be properly performed.
2016-12	the State Council	<i>Outline of Thirteenth Five-Year Tourism Development</i>	The mechanism for tourism ministerial meetings of countries and regions along the route of B&R shall be promoted to be established, and the mechanism of the Silk Road Economic Belt tourism cooperation shall be set up. The visa facilitation for the countries along the route of B&R shall be propelled. Same goes for other aspects of cooperation including the liberalization of traffic rights, mutual accreditation of licenses and certificates, vehicle extrication, and travel insurance etc. Reciprocal cooperation in tourism investment with the countries along the route shall be strengthened, and the tourism cooperation of the Maritime Silk Road cruise tours shall be pushed forward. Boutique routes of international tourism shall be jointly created whilst the reputation and influence of the B&R tourism brand shall be elevated.
2016-12	The Ministry of Culture of PRC	<i>the Action Plan of Cultural Development for the Belt and Road Initiative (2016-2020)</i>	With the following items as the basic principles, namely <i>government guidance, openness and tolerance, integration and mutual learning, innovative development, and mutual benefits and win-win</i> , the key task shall be to refine the cooperation mechanism of B&R cultural exchanges, to improve the cooperation platform of B&R

			<p>cultural exchange, to build the brand of B&R cultural exchange, to promote the prosperity and development of B&R cultural industry, and to propel the cooperation of B&R cultural trade.</p>
2017-05	<p>Ministry of Ecology and Environment of PRC</p> <p>Ministry of Foreign Affairs of the PRC</p> <p>National Development and Reform Commission</p> <p>Ministry of Commerce of PRC</p>	<p><i>the Guiding Opinions on Promoting the Construction of Green the Belt and Road Initiative</i></p>	<p>According to the requirements of ecological civilization construction, green development and sustainable development of countries along the route, networks cooperation with mutual benefits, new cooperation modes, and multiple cooperation platforms shall be built. It is expected that a pragmatic and efficient exchange system of ecological and environmental protection, supporting platforms of services as well as bases of industrial technology cooperation shall be established within 3 to 5 years' time.</p> <p>A series of risk prevention policies and measures for the ecological environment shall be formulated and implemented, and a solid foundation for the green building along B&R shall be firmly laid. It is also expected that a relatively complete service for ecological and environmental protection, a system of support and security shall be built whilst a patch of important projects of ecological environmental protection shall be implemented and excellent results achieved within 5-10 years' time.</p>

Connect the table

2017-05	The Office of the Steering Group for the Belt and Road Initiative	<i>Building the Belt and Road - Concept, Practice and China's Contribution</i>	<p><i>Tourism Year</i> shall be mutually held by China and the countries along the route of B&R. Various events of tourism promotion and exchanges shall be performed and the cooperation scale shall be mutually expanded. The World Conference on Tourism Development, Tourism Ministerial Meeting of Countries Along the Silk Road, the Tourism Ministerial Meeting of China-South Asia Tourism, the Tourism Ministerial Meeting of China-Russia-Mongolia Tourism, Highly-ranked Tourism Officers Meeting of the China-ASEAN as well as other dialogues of cooperation shall be held, so a mechanism of multi-level and multi-regional tourism cooperation along B&R is initially formed. The Silk Road Tourism Year has been held in China for three consecutive years, and the Tourism Marketing Union of the Silk Road (China) Tourism, the Promotion Union of the Maritime Silk Road Tourism, and the Alliance of China-Russia-Mongolia "Tea Road" Travel have also been established, highly propelling and enhancing the tourism brand. In the meanwhile, the cooperation in the field of sports is also prospering at the same time.</p>
2017-06	General Administration of Sport of China China National Tourism Administration	<i>the Action Plan for the Sports Tourism Development of the Belt and Road Initiative</i>	<p>Eight actions refer to the following ones – to intensify the promotion of sports tourism, to cultivate key projects of sports tourism, to strengthen facilities construction of sports tourism, to propel the equipment manufacturing of sports tourism, to boost typical modes of sports tourism, to develop the destinations of sports tourism, to build</p>

			cooperation platforms of sports tourism, and to enforce the intellectual support of sports tourism.
2019-04	The Office of the Steering Group for the Belt and Road Initiative	<i>the Belt and the Road Initiative – Progress, Contributions and Prospects</i>	Prospects: tourism cooperation shall be gradually expanded. China shall mutually organize Tourism Year with several other countries, establish several tourism cooperation mechanisms, including the Marketing Union of the Silk Road Tourism, the Promotion Union of the Maritime Silk Road Tourism, and the Alliance of Wanli Tea Ceremony International Tourism. Fifty-seven countries along the route have signed mutual agreements of visa exemption with China, whilst 19 countries have reached the agreements or the arrangements of visa simplified procedures.
To be released	Ministry of Culture and Tourism of PRC	<i>the Action Plan for the Belt and Road Culture and Tourism Development of the Ministry of Culture and Tourism (2021-2015)</i>	In the compilation process
2021-04	Ministry of Culture and Tourism of PRC	<i>O u t l i n e o f Fourteenth Five-Year Cultural and Tourism Development</i>	Building of the following projects shall be continuously conducted, namely International Theater Association for Belt and Road, Museum Union, Art Festival Association, Library Association, Art Gallery Alliance etc. The Silk Road International Art Festival, the Maritime Silk Road International Art Festival, and Silk Road (Dunhuang) International Cultural Expo and Dunhuang Travel·Silk Road International

Connect the table

			Tourism Festival as well as other themed festivals shall be properly held, and the brand influence of the Silk Road Cultural Tour shall be enhanced
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Source: Collected and Sorted by the Authors

1.2 Policies for development along Belt and Road are actively issued in local areas

As the policies at the national level for Belt and Road have been implemented and top-level design completed, governments at local level have gradually started to issue implementation plans to participate in the building of the Silk Road Economic Belt and the 21st Maritime Silk Road one after another. Relevant policies to promote the Belt and Road have been issued in several provinces (regions and municipalities), including Tianjin, Shandong, Shanxi, Henan, Jiangxi, Yunnan, Guangdong, Guangxi, Gansu, Qinghai and Xinjiang (Table 1-2). With tourism cooperation as the starting point and geographical advantages of each region taken into consideration, the tourism- relevant contents among these policies have mostly been offering policy-guidance to various aspects, including infrastructure construction, tourism brand building, tourism products development, exhibitions and events hosting and tourism investment etc. Among them, several municipal places, such as Jinan of Shandong, Jincheng of Shanxi, Yuncheng of Shanxi and Nanyang of Henan, have put forward implementation plans to participate in building Belt and Road, which are a further refined version of the provincial-level policies with work in every specific department ascertained. Soon after that, many other regions have started to carry out research for the compilation of specific plans for B&R and issue the year's key working tasks and plans, aiming at setting up plans of guidance with strong operability. For example, starting from the year of 2015, the Action Plan of Building the Belt and Road Initiative is issued annually in Shaanxi Province, which mainly focuses upon laying out the key orientations, regions, countries and projects based on the construction requests of that very year whilst putting great forces upon constructing a center of international cultural tourism. As the promotion of B&R-relevant policies takes place in the local regions, new opportunities have been created for the development of the international tourism industry alongside.

Table 1-2 Relevant Policies for Tourism along Belt and Road in Chinese Provinces

Release Year	Release Department	Policy Document	Tourism Relevant Content
2015	The People's Government of Shaanxi Province	<i>Implementation Plan for Shanxi Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	The four major cooperation platforms, namely platform for three-dimensional “ <i>Four Networks</i> ”, platform for open function, platform for business cooperation, platform for multi-subject, shall be improved. Innovation of cooperation mechanism shall be conducted, whilst the policy security for finance, monetary, insurance and talent resources shall be intensified. Business and trade cooperation, outbound investment, industry cooperation as well as folk & culture communication shall be focally prompted.
2015	Henan Development and Reform Commission	<i>Implementation Plan for Henan Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	Tourism cooperation with countries along the route shall be actively promoted. It is aimed that our province should be built to become the destination and tourist-source place with a relatively high reputation in the international tourism industry. The theme of Ancient Silk Road shall be highlighted. The building of several golden travel sites, including Luoyang Longmen Grottoes, Historic Monuments of Dengfeng in the Center of Heaven and Earth, Yin Ruins of Anyang, the Ancient Cities of Han and Wei Dynasties, the Luoyang City of Sui and Tang Dynasties, the Han Dynasty Hangu Pass of Xin'an, Xiaohan Ancient Route

Connect the table

			of Shaan County, shall be put on focus, and the provinces along the route shall be combined to bring forces to the building of the Silk Road Culture Tourism Industrial Belt. Tourism resources and brands shall be integrated. Series of unique travel products, such as the self-drive tour of the Silk Road, mysterious culture root-finding tour of the Silk Road, the practice & training tour of Chinese Kungfu, the recreation tour of Tea Culture, shall be actively planned and developed.
2015	The People's Government of Jiangxi Province	<i>Implementation Plan for Jiangxi Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	An international destination of ecological tourism shall be aimed to be built. The strategy of strengthening the province with tourism shall be intensively implemented. The building of several renowned travel scenic sites, including Jingdezhen City, Mount Lu, Mount Sanqing, Mount Longhu,
			Jinggang Mountains and Wuyuan etc shall be enforced, so the aim of building an international destination with ecological tourism can be put into practice. Marketing and promotion cooperation of tourism with countries along the route shall be intensified, and events such as tourism promotion week and publicity month shall be held mutually. Active parts shall be taken in both international and regional tourism exhibitions, and the tourism brand of the Unique Sight of Jiangxi shall be strongly propelled, so the reputation of Jiangxi tourism industry can be highly enhanced in

			<p>the global domain. A patch of special tour routes with the Silk Road as the concept shall be presented through cooperation with relevant domestic provinces, so as to attract the tourist-source from B&R regions. Other tourism markets, such as Thailand, Vietnam, Singapore and Russia shall be explored and expanded. Direct travel-flights between the countries along the route shall be opened. Support shall be shown to the possibility of charter travel, for the purpose of pushing forward the development of the international tourism market.</p>
2015	The People's Government of Guangxi Zhuang Autonomous Region	<i>Implementation Plan for Guangxi Zhuang Autonomous Region to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	<p>The mutual building of significant projects (items) shall be propelled, including China-ASEAN United University, China-ASEAN Public Health Cooperation Center, China-ASEAN Traditional Medicine Exchange Center, China-ASEAN Technology Transfer Center, China-ASEAN Poverty Reduction Center etc.</p> <p>Cooperation in different fields, such as education, health care, culture and sports, science and technology, tourism and friendship city shall be deepened, so the foundation of mass folk can be solidified.</p>
2015	Guangdong Provincial Development and Reform Commission	<i>Implementation Plan for Guangdong Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	<p>Framework agreements of tourism cooperation, and integral agreements including tourism cooperation memorandum, shall be actively signed with countries along the route. International cooperation in different fields, including</p>

Connect the table

			<p>the planning and resources opening of the tourism industry, the industrial supervision and administration as well as public service shall be deepened. More tourists of Guangdong shall be encouraged to go sightseeing in the countries along the route. And full support shall be shown to encourage enterprises in Guangdong to carry out cooperative projects of tourism investment in the countries along the route. The construction of tourist hotels, travel sites and travel infrastructure shall be performed. Cooperation shall be conducted with Chinese Chambers of Commerce or Association as well as large-scaled tourism companies in the countries along the route. In addition, Guangdong overseas tourism cooperation promotion center shall be established as well. Home-ports for international cruises shall be constructed in Guangzhou and Shenzhen whilst the development of cruise tours shall be initiated in cities such as Zhuhai, Shantou and Zhanjiang. A series of tourism projects with cross-border Silk Road as the theme shall be planned and prepared.</p>
2015	The People's Government of Gansu Province	<i>Implementation Plan for Gansu Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	<p>International and domestic cooperation shall be further planned and prepared, so that Gansu Province can be built to become an important gateway opened to the western region of China as well as a sub-regional strategic cooperation base. It is expected that the goal of Five Focuses should be</p>

			realized by the middle of the 21st century, with an aim of building Gansu into a golden corridor of international economic trade and culture cooperation along B&R.
2015	The People's Government of Yunnan Province	<i>Implementation Plan for Yunnan Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	To be released
2016	Tianjin Municipal People's Government	<i>Implementation Plan for Tianjin to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	The interconnectivity and intercommunication of infrastructure shall be promoted. Updated versions of business and trade cooperation shall be built whilst the cooperation of industry and technology shall be propelled. The level of financial openness shall be enhanced, whilst the maritime comprehensive cooperation shall be advanced and the folk and culture exchange shall be closely maintained.
2016	The People's Government of Shandong Province	<i>Implementation Plan for Shandong Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	Since the historical culture and tourism resources in Shandong Province are bountiful, platforms for high-end culture communication shall be built up with focused efforts. The tourism brand of the Hospitable Shandong shall be promoted and the Shandong Tales shall be narrated with innovation. The Qufu demonstration region for the inheritance and development of excellent Chinese traditional culture shall be elevated to become a national

Connect the table

			strategy so as to propel internationalization of Qi&Lu culture. The establishment of an international communication center of culture cooperation, the international center of recreation holiday as well as a world-known travel destination shall be accelerated.
2016	The Development and Reform Commission of Xinjiang Production and Construction Corps	<i>Implementation Plan for Xinjiang Production and Construction Corps to Participate in Building the Silk Road Economic Belt</i>	The interconnectivity and intercommunication of infrastructure shall be prompted. The eight major import & export industrial bases shall be built. Same goes for platforms for business & trade cooperation. The “going-global” strategy shall be implemented. The urban embedded layout shall be improved whilst folk and culture communication shall be closely maintained. The level of health care shall be enhanced, capabilities of financial support strengthened. The role of the ecological guardian shall be well-played, and the open-type mechanism of the economic system well-structured.
2016	The People’s Government of Shaanxi Province	<i>Implementation Plan for Shaanxi Province to Promote the Silk Road Economic Belt and the 21st Century Maritime Silk Road (2015- 2020)</i>	The following items shall be set as the construction missions – logistics of business and trade, cooperation of production capability, education of science & technology, international tourism and regional finance center. Service trade of several key fields, including tourism, culture, Chinese medicine service shall be intensively developed, and the weight of service trade shall be continuously enhanced.

2015	The People's Government of Qinghai Province	<i>Implementation Plan for Qinghai Province to Participate in Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road</i>	To be released
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1.3 The multi-industrial integration of culture, sports and tourism becomes a trend

The tourism-relevant policies in China's policies for Belt and Road belong to the same category as culture and sports-relevant policies at the present, yet the three of them used to be independent and complementary from one another in the early phase. As time goes by, policies for the integration of different industries have been constantly popping up. The Action Plan for the Sports Tourism Development of the Belt and Road Initiative, which was issued in the year of 2017, turned out to be the first practical attempt of integrating tourism with sports industries. The Action Plan aims at creating a patch of boutique sports and tourism contests, unique sports projects of recreation, sports and tourism enterprises with competitiveness as well as renowned destinations of sports and tourism in B&R regions. In the meanwhile, the Action Plan also aims at propelling the policy coordination, industry interconnectivity and people-to-people bond within B&R regions through all-round communication and interaction in sports and tourism, so that sports and tourism can become a highlighted point of the open cooperation taking place in B&R regions. Starting from the year of 2018 when the reorganization of the Ministry of Culture and National Tourism Administration took place, the integration of culture and tourism has been getting increasingly tighter. Starting from the year of 2019, the Ministry of Culture and Tourism tends to issue an annual document titled Notice of the General Office of the Ministry of Culture and Tourism on Soliciting Key Projects for International Cooperation in the Cultural Industry and Tourism Industry of the Belt and Road Initiative, which aims at propelling the actual implementation of key projects whilst promoting the

practice of B&R culture and tourism industry. The Action Plan for the Belt and Road Culture and Tourism Development of the Ministry of Culture and Tourism, which is in the compilation process at the moment, is actually a practical attempt made in the aspect of policies for tourism and culture integration. The introduction of this policy should definitely play a guiding role in the development of China's tourism industry along the route of B&R.

2. Tourism Policies in the Cooperation Documents for Belt and Road

Ever since the Belt and Road Initiative was initially coined, China has been actively seeking cooperation with countries along the route. With five focuses, namely policy coordination, facilities connectivity, unimpeded trade and people-to-people bond, as the key points, BRI has been transformed from a concept into actual implementation, from a vision into reality, and from an initiative into a public product that has gained global popularity. In the Belt and the Road Initiative – Progress, Contributions and Prospects, it is mentioned that up to November 2020, the Chinese government had signed 201 cooperation agreements with 138 countries and 31 international organizations, and that the countries which are jointly building B&R have extended from those in Asia and Europe to regions in Africa, Latin America, South Pacific etc. The signing of numerous agreements has provided practical security for the development of China's tourism industry. Among them, some new special points have emerged in the supporting policies relevant to tourism.

In the present report, seventy-nine cooperation documents that contain tourism-relevant policies are selected from the special column for cooperation documents for B&R on the official website of the State Council Information Office of the PRC. In the meanwhile, keywords are excerpted out of the documents for analyses (Chart 1-1). Among them, Tourism Year, which is an efficient form of culture and tourism communication, has appeared in 15 documents and become an important channel in the outbound tourism cooperation along B&R. In the meanwhile, several other methods, such as



Chart 1- 1 Key words of tourism-relevant policies in the cooperation documents for B&R

Source: Collected and Sorted by the Authors

encouraging tourists' exchange visits, strengthening tourism investment, improving infrastructure construction, cultivating tourism talents, adding new flights, simplifying traveling procedures and so forth, are also commonly-mentioned in tourism-relevant policies.

2.1 Policies for tourism investment continue to be deepened

China's tourism investment in countries along the route of B&R is an important method for Chinese tourism enterprises to open the global market. It also plays a significant part in intensifying the international tourism exchange as well as the opening policies. The policies for tourism investment have showcased several characteristics, including enforced investment power, diversified investment modes, expanded investment regions, etc. They have covered multiple fields, including service platforms construction, culture and tourism digitalization, design creation, tour performances, etc. In the year of 2020, China's direct non-financial investment in the countries along the route of B&R reached 17.79 billion USD with an increase rate of 18.3%, which accounts for an increase of 16.2 % in the nation's outbound investment. The turnover of contracted projects along the

route reached 91.12 billion USD, accounting for 58.4 %^① of the nation's outbound contracted projects. In the meanwhile, the enterprises in the countries along the route also hold optimistic opinions about the development opportunities in China. As a result, 4,294 companies have been recently established in China with a direct investment amount of 8.27 billion USD.

2.2 Excellent achievements in policies for tourism infrastructure

Interconnectivity and intercommunication of infrastructure is a leading practice for the Belt and Road Initiative, and the improvement of tourism infrastructure is the foundation of international tourism cooperation as well as an important condition to achieve the development of high-quality tourism. In the cooperation documents, tourism infrastructure has been mentioned several times, which are mainly demonstrated in the following aspects - the enforcement of tourism infrastructure construction, the infrastructure optimization, the encouragement of tourism infrastructure investment as well as the development of digitalized tourism infrastructure, etc. With the guidance of policies, outbound contracted projects newly signed by Chinese enterprises with the countries along the route of B&R reached an amount of 362.99 billion USD from 2013 to 2017, with an actual turnover amount of 230.76 billion USD altogether, accounting for 50.5% and 47.9%^① year-on-year. In the aspect of tourism and transportation infrastructure, China has taken part in the construction of several significant projects, including Moroni International Airport in Comoros, new Luanda International Airport in Angola, new Pokhara airport in Nepal as well as new Gwadar International Airport in Pakistan. That has efficiently enhanced the infrastructure level of the countries along the route.

2.3 The policies for tourism promotion are diversified

Tourism promotion is an important part in tourism cooperation. It is also

① Belt and Road Portal. China's direct non-financial investment along the route of B&R in 2020 grew by 18.3 % compared to that of the same year EB/OL]. (2021-01-22) [2021-07-17]. https://m.thepaper.cn/newsDetail_forward_10902912

② Department of Foreign Investment and Economic Cooperation, Ministry of Commerce. Chinese enterprises take over half of newly-signed outbound contracted projects in the countries along the route of B&R. EB/OL]. (2018-06-08)[2021-07-17]. <http://fec.mofcom.gov.cn/article/fwyydl/zgzx/201806/20180602753596.shtml>.

a very efficient force in strengthening tourism communication. In cooperation documents, commonly-seen methods, like the propelling of tourist group exchange- visits, are mentioned, whilst new types of promoting methods like the representative Tourism Year, are also proposed. It is suggested that various kinds of culture and tourism exchange events should be made use of, tourism brands should be built and travel products spread. Starting from the year of 2013, China has been mutually holding Tourism Year with several countries and regions along the route, including EU, ASEAN, CEE, Kazakhstan, Australia, Croatia, etc. In addition, China has also established China's tourism offices in Bangkok, Budapest and Astana, and offered the guidance to complete the construction of China Tourism Experience Center in Paris and Sydney. China has also hosted series of comprehensive travel festivals and events with Belt and Road as the theme, including the Silk Road (Dunhuang) International Culture Expo and Dunhuang Trip· the Silk Road International Tourism Festival, the Silk Road International Tourism Expo, the Maritime Silk Road International Tourism Festival, etc. Several cultural and travel brands, including the Silk Road Journey, Happy Spring Festival, China-Africa Culture on Spotlight, Beautiful China and so on, have also been successfully created.

2.4 Policies for tourism facilitation are pushed forward continuously

Tourism facilitation brings more efficiency to tourism and helps with tourism inflow. In cooperation documents, the policies for tourism facilitation are mostly involved with two aspects, namely the policy for visa facilitation and the policy for transportation facilitation. In the aspect of visa facilitation, there have been many countries offering an “olive branch” to China. According to the Report on 2018 Tourism Big Data of B&R which was compiled and issued by China Economic Information Service and Trip.com Group in April 2019, there had been 51 countries with joint contribution to B&R that already gave Chinese tourists the access to visa facilitation by April 1st, 2019. There have been 11 countries that implement mutual visa exemption of ordinary passports with China. Among them, the visa-free condition of Bosnia and Herzegovina is that Chinese citizens shall have a stay of no more than 90 days every 180th day for entry, exit or transit. In the meanwhile, the visa-free condition of Ecuador is that Chinese citizens shall

have a stay of no more than 90 days a year for entry, exit and transit. Nine other countries have offered a visa-free condition that Chinese citizens shall have a stay of no more than 30 days for entry, exit or transit, whilst seven other countries unilaterally have given visa-free entry permission for Chinese citizens. Thirty-three countries have the implemented policy of visa-on-arrival for Chinese tourists (Table 1-3)

Table 1-3 Visa Policies from Countries and Regions along B&R

Visa Policy	Mutual visa exemption for ordinary passports (11)	Unilateral permission of visa-free entry for Chinese citizens (7)	Unilateral permission of visa-on-arrival for Chinese citizens (33)
Countries and regions of B&R	UAE, Barbados, Peizi, Grenada, Seychelles, Tonga, Serbia, Bosnia and Herzegovina, Belarus, Ecuador, Qatar	Indonesia, South Korea (Jeju Island, etc.), Tunisia, Morocco, Samoa, Antigua and Barbuda, Dominica	Thailand, Indonesia, Vietnam, Myanmar, Laos, Cambodia, Maldives, Bangladesh, Brunei, Nepal, Egypt, Sri Lanka, Timor Leste, Lebanon, Madagascar, Turkmenistan, Bahrain, Vanuatu, Azerbaijan, Iran, Jordan, Armenia, Tanzania, Zimbabwe, Togo, Cape Verde, Gabon, Guyana, Côte d'Ivoire, Rwanda, Uganda, Mauritania, Suriname

Source: Shanghai General Station of Immigration Inspection

As the opening and international cooperation continue to grow deeper, China is also in the process of actively propelling the convenient policies for visa-free transit. By December 1st, 2019, there had been 30 ports of 23 countries in 18 provinces (regions and municipalities) that had implemented the policy of 144-hour visa-free transit and 72-hour visa exemption (Table 1-4) for citizens from 53 countries (including 25 countries along B&R). The proper implementation of the favorable visa exemption and visa-on-arrival policies has directly propelled

the inflow of international citizens. It serves as a powerful helping hand to push forward the rapid tourism development of countries along the route of B&R.

Table 1-4 Policies of Visa-free Transit for Foreign Citizens

Visa Policy	144-hour visa-free transit for foreign citizens (23)	72-hour visa-free transit for foreign citizens (3)
City	Beijing, Tianjin, Shijiazhuang, Qinhuangdao, Shanghai, Hangzhou, Nanjing, Shenyang, Dalian, Qingdao, Chengdu, Xiamen, Kunming, Wuhan, Guangzhou, Shenzhen, Jieyang, Chongqing, Xi'an, Ningbo	Changsha, Guilin, Harbin
Beneficial countries and regions along B&R (25)		
Czech Republic, Estonia, Greece, Hungary, Latvia, Lithuania, Poland, Slovakia, Slovenia, Russia, Cyprus, Bulgaria, Romania, Ukraine, Serbia, Croatia, Bosnia and Herzegovina, Montenegro, Macedonia, Albania, Belarus, Singapore, Brunei, UAE, Qatar		

Source: National Immigration Administration

In the aspect of transportation facilitation, China aims at building an omnidirectional, multi-level and composite interconnection network with countries along the route of B&R, so as to achieve diversified, independent, balanced and sustainable development in all the countries. The specific policies include the aspects of adding flight routes, opening direct flights, strengthening maritime and land transportation, etc. In April 2019, China and ASEAN signed the first-ever agreement of regional air transportation, successfully creating the condition of air rights to build the Air Silk Road. So far, China has signed 18 agreements of land transportation facilitation, and 39 maritime agreements with countries along the route. Also, China has signed bilateral governmental agreements of air transportation with 62 countries along the route and opened direct flights with 45 countries along the route, with navigation capability covering 83.87% of Chinese provinces. The cumulative number of running trains of China Railway Express has

hit 14,000, and the trains reach 49 cities of 15 European countries, bringing the tourism facilitation to an even higher degree.

3. The Tendency of Tourism Policies Development along Belt and Road

As B&R cooperation keeps advancing, tourism-relevant policies are constantly refined and a relatively complete policy system has been formed. Starting from the year of 2016, tourism-relevant policies in cooperation documents have been getting more and more specific, so that the macroscopically-developed policy has been shifted to detailed cooperation policies that are involved with tourism infrastructure, tourism market, tourism investment, travel products, travel exhibitions, tourism education and tourism transportation to name but a few. From the long-term perspective, the future tourism policies for B&R should demonstrate the following tendencies.

3.1 The principal entities in tourism cooperation are getting more multivariant

The Belt and Road Initiative, in the preliminary phase, was top-level cooperation taking place between the Chinese government and the national-level governments as well as international organizations of the countries along the route. As B&R gradually develops, the collaborative principal entities have been continuously expanded and get more diversified, with cities, enterprises, academies joining one after another. In May 2015, the University Alliance of the Silk Road was founded, attracting nearly 100 universities from 22 countries and regions to be part of it. That has pushed forward the talent cultivation and cultural tourism communication of the countries along the route of B&R. In July 2017, China initiated to establish the World Tourism Alliance (WTA), which is the first international tourism organization that is global, comprehensive, non-governmental and non-profitable. That provides support to various aspects in tourism cooperation along BRI, including industry communication, industry studies, intellectual service, etc. In October 2017, the Urban Development Union

of Countries along the Belt and Road Route (UOBR) was officially approved for the establishment, which specializes in providing service for governments and enterprises. So far, connections have been established with 156 countries, coordination mechanism has been formed with 68 countries and collaborative project relationship has been built with more than 20 countries across the globe, some of which have taken off in some countries already. As the transnational cooperation deepens step by step, the future policies for B&R tourism are going to include more multivariant principal entities of tourism cooperation as well as many other collaborative principal entities, so that the economic cooperation and development along the route of B&R can be pushed forward with joined forces.

3.2 Cooperation in the new formats of tourism is gaining popularity

As cooperation advances, the cooperation in new formats of tourism has already become a highlighted point in cooperation along B&R. In the Joint Statement on Deepening the Comprehensive Strategic and Cooperative Partnership between China and Russia issued in July 2017, it is mentioned that the types of services shall be enriched, and deepened implementation of historical and red-tour cooperation shall be propelled. In the Joint Statement of the People's Republic of China and the Kingdom of Spain on Strengthening the Comprehensive Strategic Partnership in the New Era issued in November 2018, it is expressed that the enormous opportunities emerging out of bilateral tourism cooperation shall be well utilized. It is discussed that exchange visits between experts in the fields such as sustainable tourism, wisdom travel and tourism innovation shall be intensified for the optimum practical communication, so that the competitiveness of tourism destinations can be enhanced. In the Joint Statement of the People's Republic of China and the Russian Federation on the Development of a Comprehensive Strategic Partnership of Cooperation in the New Era issued in June 2019, it is pointed out that the expansion of new formats of tourism, including Arctic travel, automobile travel, theme travel and so on, shall be encouraged. These supporting methods, which reflect the features of new formats of tourism, have become the new tendency for countries along the route of B&R in the seeking of tourism cooperation. In Statement of the Council of Heads of State of the Shanghai Cooperation Organization of Cooperation in the Field of Digital Economy

issued in November 2020, it is required that all relevant countries shall carry out cooperation of digitization and information and communication technology in the tourism field, which has pushed forward the digitization process of countries along the route of B&R in their development of tourism industry. These released policies are offering important references for the future tourism cooperation fields as well as cooperation methods for countries along the route, playing as a guide for all countries in furthering the cooperation in new formats of tourism.

3.3 Joint bidding for the World Heritage continuously booms

The cultural heritages in countries along the route of B&R provide cultural support for the building along B&R. It is also an important ribbon that connects the countries along the route of B&R in culture and tourism communication. At the 38th World Heritage Convention that took place in Doha of Qatar on June 22nd, 2014, the joint-bidding of the Silk Roads: the Routes Network of Chang'an-Tianshan Corridor by China, Kazakhstan and Kyrgyzstan, managed to be listed in the World Cultural Heritage, becoming the first-ever cross-border project that had ever got included in the World Heritage. That made the countries along the route start to attach importance to the joint protection of their cultural relics as well as the joint bidding for World Cultural Heritage. In recent years, the Ministry of Culture and Tourism of the PRC, in conjunction with the National Heritage Board, has been vigorously promoting the communication cooperation in the field of cultural heritage between countries along the route of B&R. By September 2018, China has signed 12 bilateral agreements and Memorandums of Understanding on cultural relics security and cultural heritage with 11 countries, including Cambodia, Myanmar and so on. In the upcoming future, the cooperation in the field of cultural heritage with countries along the route is going to be continuously deepened, and international studies, protection and joint bidding for World Heritage of the Maritime Silk Road are going to be scheduled very soon as one of the important contents in tourism-relevant policies.

3.4 The status of tourism security is getting more prominent

After the COVID-19 epidemic broke out, the tourism industry has been severely stricken and the key point of B&R cooperation has also been shifted

to the fight against the epidemic. Among them, the most direct impact cast upon tourism policies is the altered visa policies, as many countries have adopted the strategy of lockdowns in cities and countries and compressing visa management. In the Statement of G20 Extraordinary Leaders' Summit on COVID-19 issued in March 2020, it is pointed out that the most urgent task for the time being should be to handle the epidemic as well as the complicated impacts that have been brought about in health, society and economy. As one of the fastest-growing industries with the biggest scale in the development of the global economy, tourism is a very crucial leverage for economic recovery, and the huge breakout of the epidemic globally has aroused the world's concerns for tourism security. In the most recent cooperation document, the policies for tourism security start to emerge. In January 2021, China and Brunei announced the establishment of a “fast track” between the two countries, so as to guarantee safe inflows and travels. In June 2021, China launched the Initiative for Belt and Road Partnership on COVID-19 Vaccines Cooperation, which sticks up for the personal security of the residents across the globe. In addition, many places have started to work upon the mechanism of “vaccine passport” one after another. In the upcoming tourism policies, tourism security is going to become the foundation and highlighted the issue in the communication of international tourism cooperation, so the policies for tourism security are going to frequently arise with contents getting increasingly stringent.

3.5 The influence of international political circumstance draws more attention

Cooperation between countries along the route of B&R is influenced by international political circumstances. Because of the differences in their respective historical traditions, economic development and social cultures, each country along the route differs in the political system and structure. Same goes for the completely different diplomatic manners that have been formed. Some countries along the route of B&R are politically steady, socially peaceful and economically flourishing, whilst some countries are going through political turbulence when the governmental offices constantly get turned over and wars arise here and there. Therefore, they have different standpoints, attitudes and strategy cognitions towards the Belt and Road Initiative, which has affected deepened cooperation

between countries to some degree. In the meanwhile, the USA has been paying rigorous attention to the military situation in the Central Asian area, which has also become a disadvantageous factor that troubles the cooperation between countries along the route of B&R.

Chapter Two

Tourism Market Cooperation along Belt and Road

By Wu Liyun / Xu Jiayang

Starting from the year of 2013 when the Belt and Road Initiative was firstly advocated, China has been in constant communication and interconnection with countries along the route of B&R. In the meanwhile, as partnership deepens, mutual benefits continue to ferment, so that the tourism market in countries along the route has been going through hasty development. Thanks to the bountiful tourism resources existing in the countries along the route, they are taking up a pivotal position in the world tourism economy.

1. Inbound Tourism Market in the Countries along the Route of Belt and Road

1.1 Inbound tourism grows steadily, and BRI benefits many countries

Since the Belt and the Road Initiative was presented to the public, the cooperation of economy, society and culture between countries along the route has been reinforced and tourism development in those countries has also stepped into a new phase. In 2013, the number of inbound tourists from countries along B&R was 431 million person-times, whilst the number reached 598 million in 2019, 1.39 times more compared to that of 2013 with an annual average growth rate of over 5% (Chart 2-1). In 2020 when the epidemic broke out, the number of inbound tourists in the countries along the route of B&R decreased tremendously, hitting only 231 million person-times.

The number of inbound tourists in the countries along the route of B&R has been growing at a stable pace. Yet the number swells especially quickly in the



Chart 2-1 The number of inbound tourists in the countries along the route of B&R from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

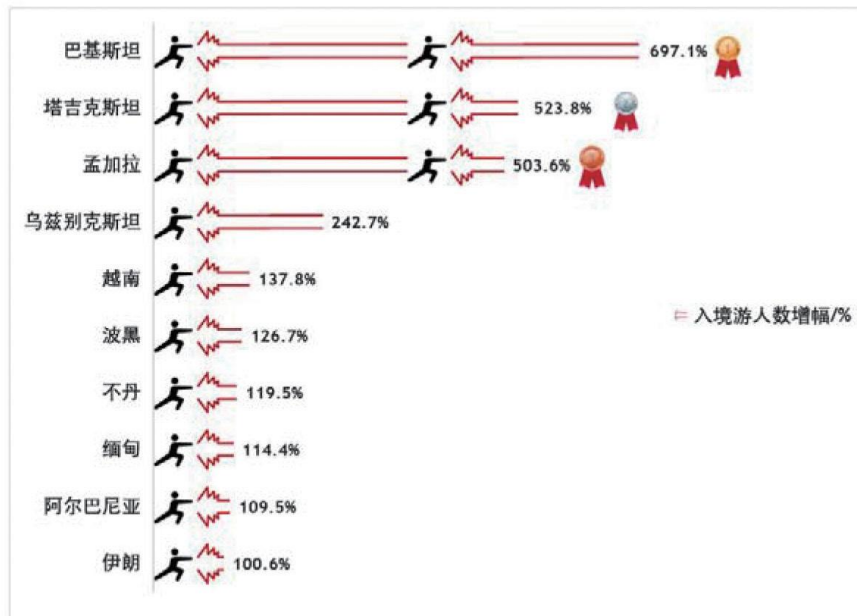


Chart 2-2: 2013 – 2019 Top10 countries with the largest increase extent in terms of the number of inbound tourists in the countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

countries located in the areas of Central Asia and South Asia. From 2013 to 2019, Pakistan turned out to be the country with the largest growth of inbound tourists among the countries along the route, becoming the first on the list with a growth of 697.1%. There are plentiful tourism resources in Pakistan, including the rugged peaks of the Karakoram Mountains, the fertile Indus plains, the religious and cultural sites as well as the ancient Silk Road. All of these exceptional resources have laid an excellent foundation for the rapid development of the tourism industry in Pakistan. In the meanwhile, the construction of the China-Pakistan Economic Corridor has activated a wild rise in the domestic infrastructure and transportation capability in Pakistan as well. The interconnecting and intercommunicating trade channels as well as the investment environment opening with the year round have provided extraordinary opportunities for tourism industry development, which gigantically push forward the inbound tourism development in Pakistan to a higher degree, so subsequently in 2019, the number of inbound tourists to Pakistan reached 4.5 million person-times. Although much room remains for improvement in the inbound tourism of Pakistan in terms of the overall scale, its expeditious development should be worthy of attention. In the secondary class are Tajikistan, Bangladesh and Uzbekistan, where the increase rate maintains over 240%, whilst the increase rate in Vietnam, Bosnia and Herzegovina, Bhutan, Myanmar, Albania, Iran and other countries also maintains as over 100% (Chart 2-2). Among the top ten countries with the largest increase, 80% of them are located in Southeast Asia, Central Asia, South Asia and other Asian regions, which manifests that there is a strong correlation effect between the exposure effect of B&R and the neighboring regions.

There was a small fluctuation occurring from 2013 to 2020 in the TOP10 countries in terms of inbound tourism in countries along the route of B&R (Chart 2-3), yet their ranks remain relatively steady. China tops the rank, whilst Turkey, Thailand, Malaysia stay inevitably as the top five. Greece experiences the largest increase, hitting the third position in 2020 from the seventh in 2013 as the country that has made the highest jump in rank on the list. Due to the epidemic, Russia and Singapore were deeply affected and fell out of their top ten positions in 2020. But one thing is clear - 10 ASEAN countries have always taken up half of the top 10

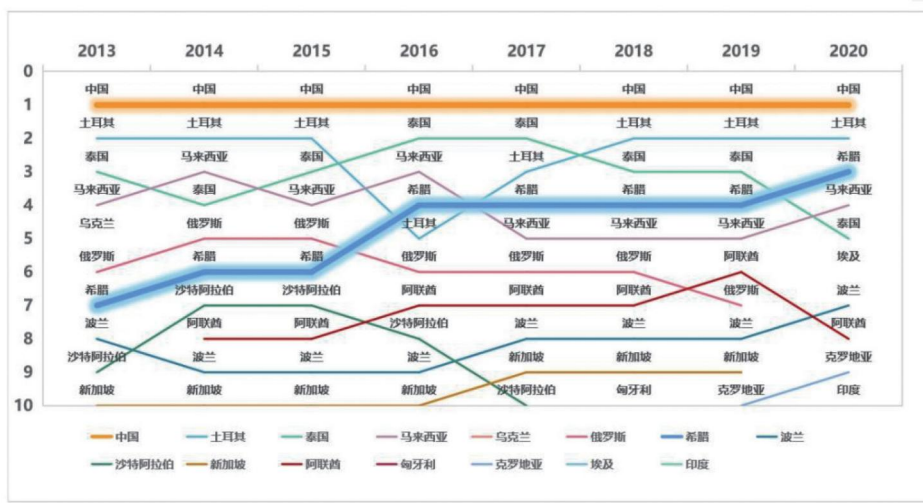


Chart 2-3 2013-2020 Top 10 countries of inbound tourism in countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

countries in the past few years, when it comes to the number of inbound tourists in the countries along the route of B&R.

1.2. Choices of traveling companions vary, and traveling with family members become favored

As people's travelling experience and perspectives change, traveling with family and friends is getting increasingly favored in the market of inbound tourism in the countries along the route of B&R. In 2013, group travels accounted for 20.28% among the choices of traveling modes made by inbound tourists in the countries along the route of B&R, whilst couple travel and family travel accounted for 18.18% and 22.88% respectively (Chart 2-4). Other travelling modes are mostly clustering trips with friends and family for a certain destination, like trips for weddings and themed events, etc. Generally speaking, travelling with friends and family has become a typical characteristic in the inbound tourism market of the countries along the route of B&R. In 2019, this characteristic went forward and became increasingly intensified. Compared to that of 2013, the mode of couple travel and family travel grew tremendously, accounting for 21.05% and 24.28% respectively, namely 4.37% more than that of 2013, whilst the proportion of

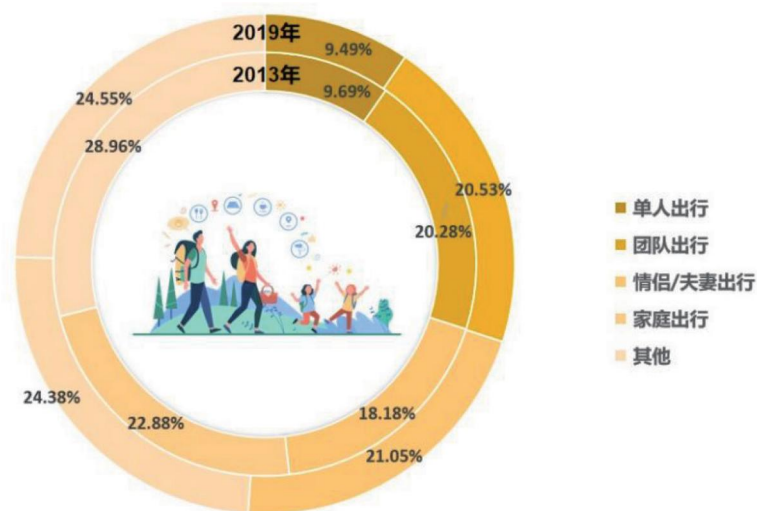


Chart 2-4: The companion alternation of inbound tourism in the 24 countries along the route of B&R in 2019

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

group travel did not experience many changes. In the meanwhile, solo travel stayed relatively steady at around 9%, which was quite a small proportion. Compared to travelling solely far away from home, traveling with family and friends seems to be more preferred.

The characteristics of travel companions differ from the countries along the route of B&R as well. The Philippines, for example, receives the largest number of solo tourists among all the countries. In 2020, 30.44% of inbound tourists travelled to the Philippines alone, creating a percentage higher than the average 9.63%. The Czech Republic, on the other hand, receives the most group tourists. In 2020, 38.95% of inbound tourists travelled to the Czech Republic in groups, creating a percentage far higher than the average 20.24%. Croatia receives relatively more couple-tourists. In 2020, 47.18% of inbound tourists travelled to Croatia as a couple, creating a percentage double times higher than the average 22.36%. Saudi Arabia, however, gains the biggest popularity among family tourists, with a stable proportional percentage between 44%-50% throughout the years. In 2020, 46.4% of the inbound tourists travelled to Saudi Arabia as family tourists, creating a percentage higher than the average 24.58%.

1.3 With recreation as the main travelling purpose and business as the supplementary, fun and work are combined properly

In the aspect of traveling purposes, most of the inbound tourists primarily aim at recreation and entertainment, as business comes as the second. From 2013 to 2020, the proportion of inbound tourists from countries along the route of B&R with recreation as the travelling purpose grew from the original 85.43% to 85.43%, whilst the proportion of inbound tourists with business as the travelling purpose dropped by nearly 5%, accounting for only 10 % currently (Chart 2-5)

Among the inbound recreation travels, the number of inbound tourists for recreation travels exceeded 25 million person-times in 2019 in China, Turkey, Thailand, Greece and Malaysia, and China topped the rank with a number of 67.03 million person-times (Chart 2-6). During the past six years, the number of inbound tourists for recreation travels in China, Thailand and Greece has had an increase of over 50%, whilst Vietnam, which has an increase of 137.62%, has become the country with the highest growing speed in terms of inbound recreation travels. The comfortable and pleasant natural climate as well as low-priced, fine travel products, have made Vietnam one of the top choices for many people who love to spend their holiday in a leisurely way. Nha Trang, which is a coastal port town, has even been developed to become a world-known holiday resort that is integrated with recreation, entertainment, sports and hot springs. In the aspect of business travels, China, Poland and Russia have always been the top three on the list of inbound business travels, and all of them took in more than 5 million inbound business person-times in 2019. The Middle East countries, with UAE, Saudi Arabia as the leading ones, have carried on the business spirit of the Maritime Silk Road, so their market of business travels is getting increasingly better recently, preempting $\frac{1}{4}$ of the market share whilst growing steadily at the same time.

1.4 Inbound tourism income grows steadily, and tourists become increasingly capable of consuming

The flourishing development of inbound tourism has cast a profound influence upon the national economy of the countries along the route of B&R. In 2019, the total inbound tourism income in the countries along the route of B&R



Chart 2-5 The proportion alternation of inbound tourism in the 24 countries along the route of B&R from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

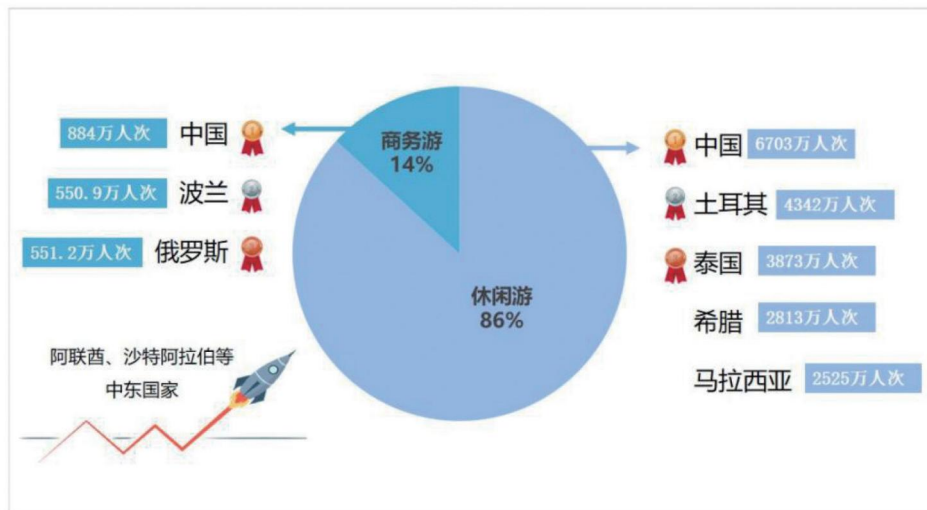


Chart 2-6 The composition of inbound tourism in the 24 countries along the route of B&R in 2019

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

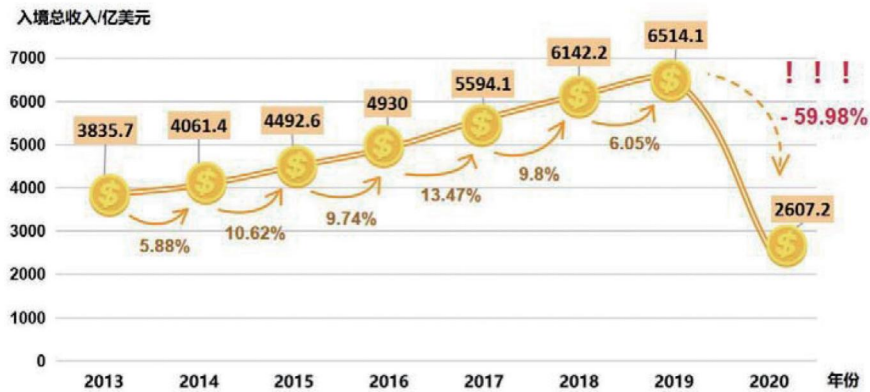


Chart 2-7 2013 to 2020 inbound tourism income in the countries along the route of BRI

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

reached 651.41 billion USD, growing by 6.05% compared to that of 2018 and 1.7 times more than that of 2013 (Chart 2-7). In 2020 when the epidemic struck the world, the inbound tourism income in the countries along the route of B&R dropped to 260.72 billion USD. From 2013 to 2019, the inbound tourism income in the countries along the route of B&R had an annual steady rate of 9.2%. From 2013 to 2019, the travel expenditure of inbound tourists per capita grew from 890 USD in 2013 to 1,130 USD in 2020. As it can be seen, the tourists are growing more and more capable of consuming.

In the aspect of the composition of inbound tourism income, the recreation travel income exceeds that of business travel, and its advantages are continuously broadened as well, basically determined by the huge traffic of recreation travels. In 2013, the business travel income accounted for 1/5 of the total income of inbound tourism, yet the number dropped afterwards all the way to 2019, when the proportion broke a record of 15%. However, compared to the expenditure of 1,022USD per capita on recreation travel, the expenditure of 1,242 USD per capita on business travel is still worth some reflection.

1.5 China steadily tops the rank of inbound tourism income, yet Turkey stands out as a latecomer

Among the countries along the route of B&R, the top ten countries on the

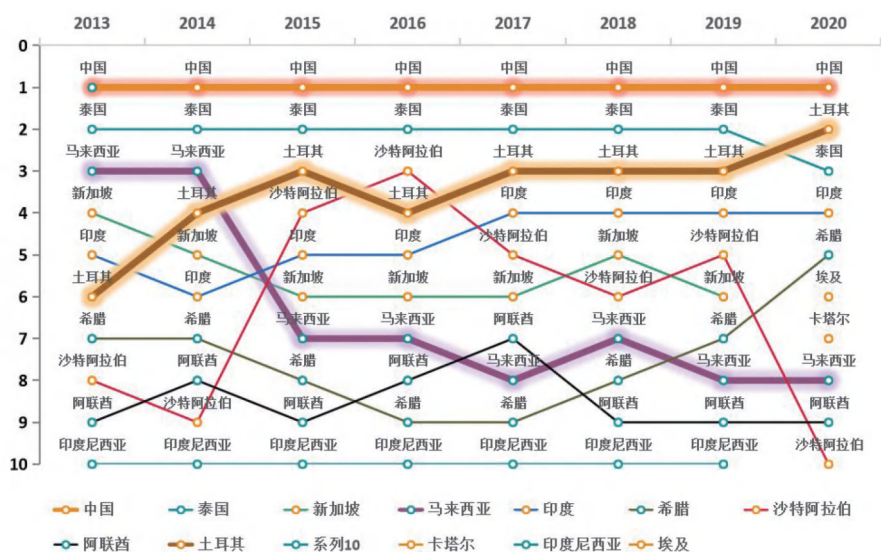


Chart 2-8 2013 to 2020 top 10 list of inbound tourism income in the countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

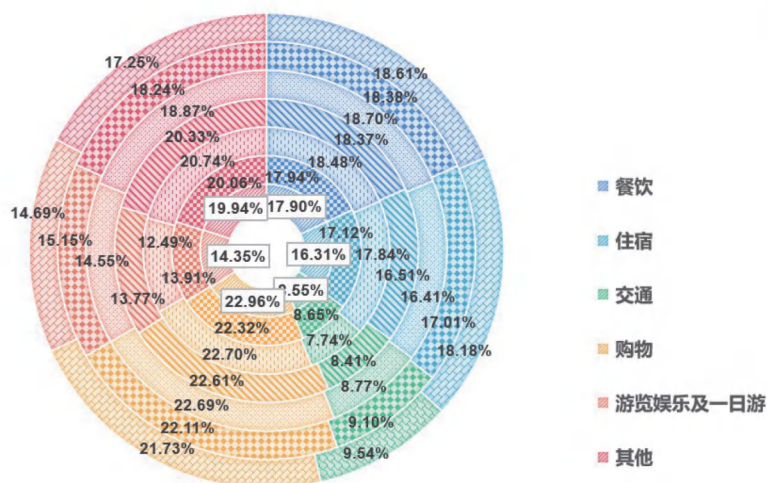


Chart 2-9 2013-2019 proportion of the inbound tourism income in the countries of 24 countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

rank of inbound tourism income are relatively stable (Chart 2-8). China steadily tops the rank, and contributes to 1/5 of the total inbound tourism income in the countries along the route of B&R alone. However, as the inbound tourism in other countries continues to develop, China's leading position weakens as well. In 2013, China's inbound tourism income took up around ¼ of the total inbound tourism income of the countries along the route of B&R. Yet by the year of 2020, the proportion already dropped to 19%.

Thailand, Malaysia, India, Greece, Saudi Arabia, UAE and Turkey still remain on the Top 10 list of inbound tourism income. The inbound tourism income of Turkey grows ferociously, so that it hopped from the original sixth on the list in 2013 to the second in 2020. Malaysia, however, experiences a fall, dropping from the original third in 2013 all the way to the seventh in 2020. Singapore, however, fell out of the Top 10 list in 2020 when deeply affected by the epidemic.

In the context of the applaudable inbound tourism development in the countries along the route of B&R, several countries, such as Afghanistan, Iraq, Kuwait, Syria, Yemen, are suffering from political turbulence and local military conflicts. That has made it hard for them to guarantee the personal security of the tourists. Therefore, the inbound tourism income of these countries has been declining continuously for years in a row.

1.6 Shopping consumption takes up the highest proportion, and the trend of buying stuff is worth the concerns

The consumption structure of inbound tourism in the countries along the route of B&R is going through changes as well. The increase of consumption exceeds 8% in catering, accommodation, transportation, shopping and entertainment sightseeing as well as one-day outings. Among them, shopping consumption becomes the primary expenditure in the inbound tourism consumption with an average proportion of 22.42%. (Chart 2-9). "Buying stuff" has become an outstanding characteristic arising among inbound tourists in all countries, and their main favored items are the nationally branded stuff, luxurious goods and special products of the countries. Accommodation consumption increases as well. It increased from the original 16.31% in 2013 to 18.19 % in 2019, which manifests that tourists have enhanced their requirement for the accommodation quality.



Chart 2-10 The number of outbound tourists in the countries along the route of B&R from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

2. Outbound Tourism Market in the Countries along the Route of Belt and Road

2.1 The number of outbound tourists keeps growing, and recreation travel owns an absolute dominating place

The building along B&R has boosted the economic development of the countries along the route, and improved folk's life quality. It has also provided solid materialistic security for the general public to participate more actively in outbound tourism. In 2013, the number of outbound tourists in the countries along the route of B&R reached 367 million person-times. From 2013 to 2019, the number of outbound tourists in the countries along the route of B&R increased by 1.4 times, with a yearly increase rate of 6.1%. In 2017, the increase reached 9.47%. In 2020, the number of outbound tourists in the countries along the route of B&R reached 523 million person-times. Among that, recreation travels took up 78% and business travels 22%. Although recreation travels own an absolute dominating place in outbound tourism, the proportion of business travel also increases step by step. From 2013 to 2019, the proportion of business travel increased from 21.07% to 23.09%. In 2020, the outbound tourism in the countries along the route of B&R

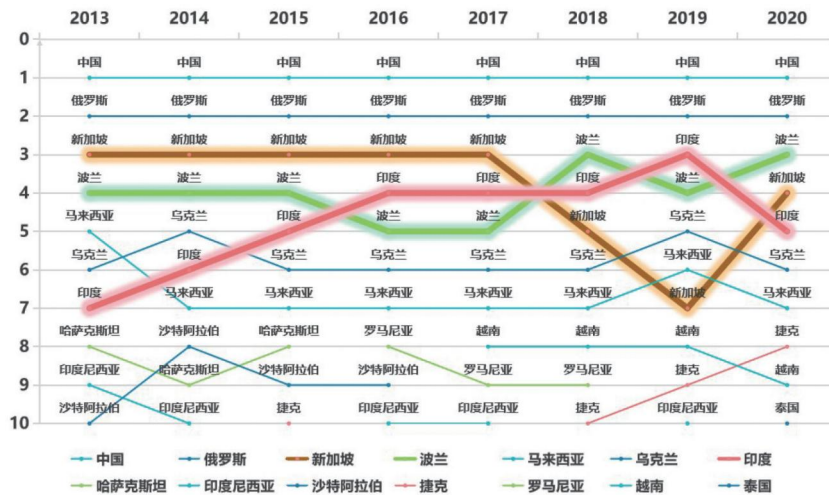


Chart 2-11 2013-2020 Top 10 list of the number of outbound tourists in the countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

had a cliff fall due to the COVID-19 epidemic, with the number of outbound tourists reaching only 217 million person-times.

2.2 China and Russia rank first on outbound tourism list, and countries on top10 list remain relatively stable

Because of their huge population base and robust travelling demands, China and Russia ranked first on the outbound tourism list of the countries along the route of B&R from 2013 to 2019. The number of outbound tourists from these two countries accounts for nearly 1/3 of the total number of outbound tourists in the countries along the route of B&R (Chart 2-11). The number of outbound tourists in China keeps growing steadily, and from 2013 to 2019, the number of outbound tourists increased from 58.69 million person-times to 103 million person-times. The number of outbound tourists in Russia, however, grows first before falling. In 2013, the number of outbound tourists reached 44.75 million person-times yet declined all the way to 26.89 million person-times in 2016. In 2017 when Russia's domestic economy was on the smooth road, and domestic travels more highly-priced, the increase of outbound tourism grew by 29.77%, picking up Russia's outbound tourism market. In 2019, the number of outbound tourists in Russia

managed to return to 40.40 million person-times, which still failed to be at the same level as that in 2013.

Among the Top 10 outbound tourism of the countries along the route of B&R over the years, Singapore, Poland, Malaysia and Ukraine are also seen on the list, apart from China and Russia. Despite the occasional fluctuation, the overall situation shown on the list stays steady. The outbound tourism in India is generally on a rise. It hopped from the seventh position in 2013 to the third in 2019. Due to COVID-19 epidemic, however, it went back to the fifth position in 2020 once again.

2.3 Travelling by sea, on land and by air are all the transportation modes for outbound tourism, whilst travelling by plane or train has gained the biggest popularity

After the Belt and the Road Initiative was presented to the public, the transportation and road infrastructure in the countries along the route have been continuously enhanced, and the transportation modes between these countries have become more diverse, with the number of flights, trains and ships increasing stably. That has provided a transportation foundation for the outbound travels for

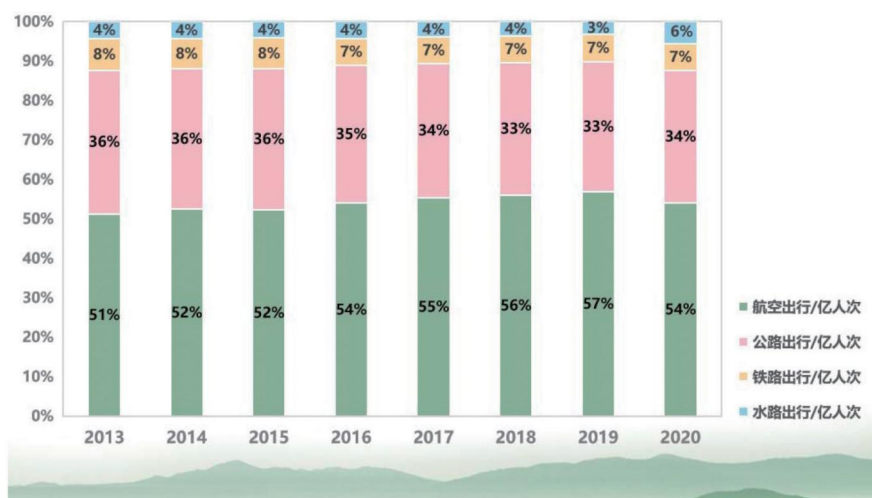


Chart 2-12 2013 to 2020 transportation modes of outbound tourism in 48 countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

the residents in the countries along the route of B&R. Among the transportation modes for travelling in the countries along the route of B&R, travelling by air, on the railway, highway or waterway is all possible (Chart 2-12). Travelling by air has been the first choice made by tourists for long-distance outbound travels, and more than half of the tourists choose to travel with planes. In 2019, the proportion of air travelers reached as high as 57%. That made air become the most favored transportation mode among outbound tourists. When it comes to business travels, nearly 70% of the tourists choose to travel by air due to the precious, limited time, and the number exceeds that of outbound tourists for recreation. In 2019, airplanes were chosen as the outbound transportation mode upon 271 million person-times conducted in 48 countries along the route of B&R. Almost every outbound tourist chooses to travel by air (99.28%) in India, and more than 90% of the outbound tourists from UAE, Israel, Cyprus and the Philippines also choose airplanes as the travelling mode. In the aspect of land transportation, the number of tourists that choose highway travel exceeds that of railway travel, which is a commonly-seen situation occurring on outbound travels conducted in the countries adjacent to the border. Compared to the fixed schedule of railway routines, driving on the highway is much easier to control, thus getting quite preferable among tourists. One third of tourists choose to travel on highways and from 2013 to 2015, 36% of the tourists chose to travel on highways, though the proportion has dropped to around 33% in recent years. The proportions of travelling on railway and waterway as the modes are relatively lower, with only 10% of the tourists choosing to travel by train or ship for outbound travels. More than half of the outbound tourists in 15 countries along the route of B&R tend to choose to travel on highways as the mode, but most of these countries involved are located in Central and Eastern Europe with adjacent space and relatively short distances in between. That, in some way, has promoted the development of travelling on highways between these countries.

2.4 Companionate travel is still dominating, and solo travel is not yet to get common

Tourists have a preference of travelling with companions for the outbound travel in the countries along the route of B&R. As the statistics show, nearly 60% of

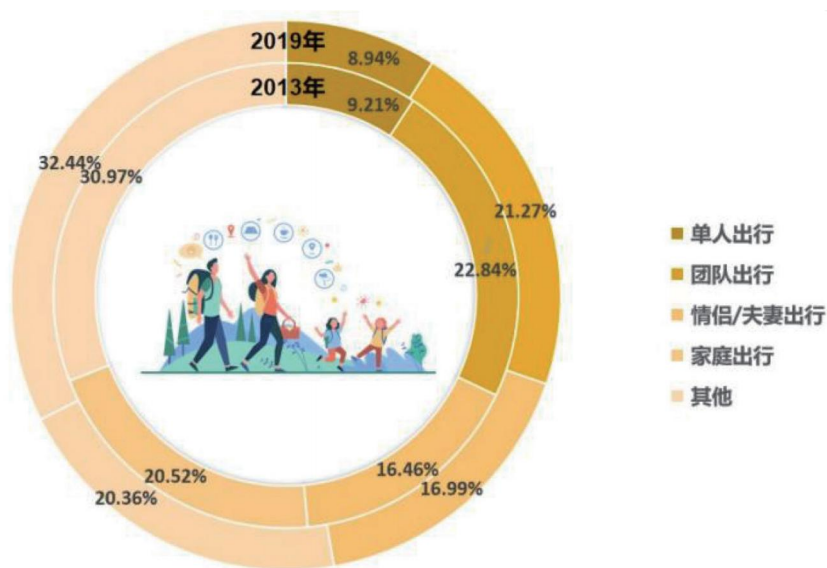


Chart 2-13 2013 and 2019 companionate choices made among outbound tourists in the 24 countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

the tourists choose to travel with partners, family members or in groups. Only less than 10% choose to travel abroad alone (Chart 2-13). The exotic culture and long distance do sound very appealing, but there are also numerous unknown challenges in store, as well as terror too difficult for most of the common travelers to overcome. Therefore, solo outbound travel is not a very commonly-seen choice made among people. Among the modes of companionate travel, group travel took up the highest proportion in 2019, with 21.27% of the outbound tourists choosing to travel with groups. Family travel came as the second, with 20.36% of the outbound tourists choosing to travel with family members, whilst couple travel took up 16.99%.

However, tourists from Poland show relatively less desire to travel with groups. Instead, they prefer solo travels (24.55%) or a tour with companions they are in a socially close relationship with (60.29%). Increasingly many people from Israel choose to travel abroad with their partners. In 2013, the couple outbound tour accounted for 15.32% in Israel, whilst in 2017, the percentage exceeded 20% and reached 22.51% in 2020. As the proportions in other countries remain the same, the conspicuous growth in Israel has drawn a great deal of attention. More

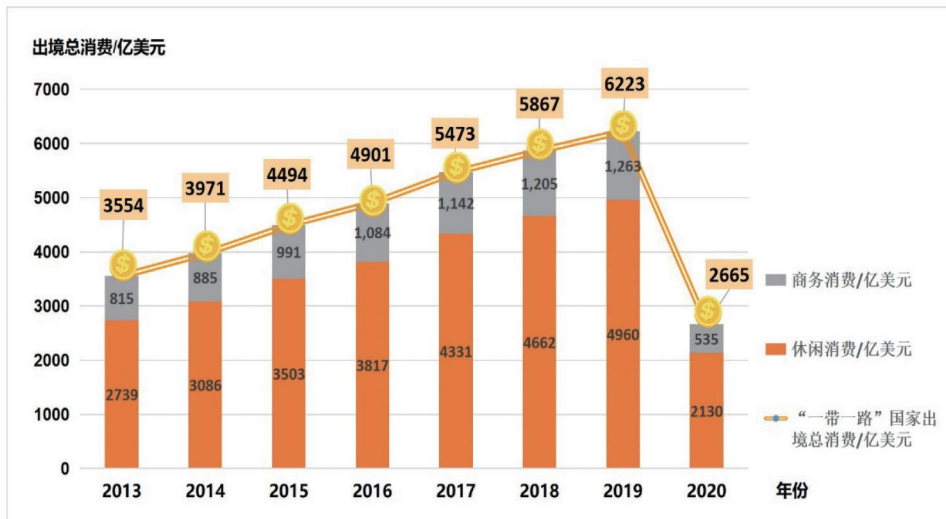


Chart 2-14 2013 to 2020 outbound consumption of the countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

than half of the outbound tourists from Saudi Arabia choose to travel with their family members, tremendously exceeding that in other countries. That probably has something to do with the strong traditional ideologies and family perspectives of the Islam religion they are holding onto. People from Indonesia prefer to travel in groups, with nearly half of the outbound tourists choosing to join a group for their outbound travels. Among the top 10 countries with the highest proportion of group travel, it turns out that at least $\frac{1}{4}$ of the outbound tourists from Indonesia end up choosing this traveling mode.

2.5 Consumption of outbound travel is of high quantity, and recreation consumption is taking the dominance

Ever since the Belt and the Road Initiative was presented, interconnection and intercommunication between the countries along the route have not only vitalized the economic capability of those countries but also elevated the residents' consumption abilities in tourism. In 2019, the total amount of outbound tourism consumption in the countries along the route of B&R reached 622.3 billion USD, which was 1.75 times more than that of 2013 with an annual increase of nearly 10% (Chart 2-14). In 2020, the outbound tourism consumption in the countries along the route of B&R glided down swiftly due to the COVID-19 epidemic, so

the year's total amount of outbound tourism consumption reached only 266.5 billion USD.

Recreation consumption is still the major entity of outbound tourism consumption, accounting for averagely 78.61% of the total outbound tourism consumption. Judging from the proportion recreation consumption takes up in the year's consumption, recreation consumption is generally on a rising tendency, increasing to 79.7% in 2020 from 77.08% in 2013. Compared to business consumption, recreation consumption has been dominating in the market of outbound tourism consumption in terms of both the increase in size and speed. China, India and Russia have made bountiful contributions to the recreation tourism market, whilst Malaysia and Turkey hold enormous potential in the business consumption market.

In recent years, China's high-end digital products have gained popularity among overseas markets. The outstanding function capability and excellent quality as well as the cost-effectivity have made a series of China-branded smart products, such as Xiaomi, Huawei and OnePlus, become best-selling products in the overseas market. The DJI UAV as well as domestically-produced power banks experience sudden popularity thanks to the properly-set price, and they have become one of the most sought-after products to be bought by overseas tourists in China. Health & Therapy travel is a new travelling mode spawned by the concept of a modern healthy life, which has activated the consumption of major healthcare products in the outbound tourism market of different countries. According to the report of Global Wellness Tourism Economy publicized by the USA's Stanford University in 2019, the Asia-Pacific region is the world's largest market for medical and health travel, with India, Thailand and Malaysia topping the first three positions, whilst Europe is the second-most active region next to the Asia-Pacific region. In the meanwhile, the Middle East and Latin American countries are the places where the emerging markets of this industry actually prevail. In the Asia-Pacific region, India has the largest market of medical and health travels, and it grew at an annual rate of 15% before COVID-19 epidemic broke out. It has attracted clients who are mainly from Bangladesh, Oman, Uzbekistan, Yemen, Maldives, Sri Lanka, Myanmar and so on, 80% of whom are surgery patients. The countries along the route of B&R have also seized the opportunities that pop out of the Health & Therapy tourism industry through deepened cooperation. For example, China has participated in the strategic consultation project of international medical and health cities in the United Arab Emirates, Saudi Arabia, Turkey and other countries. Also, China has joined forces to build a coastal vacation and health tourism demonstration area with many countries as well.

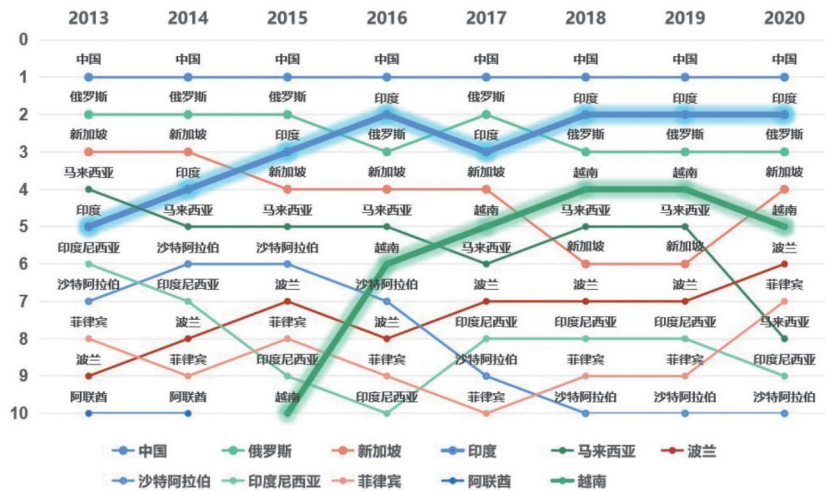


Chart 2-15 2013 to 2020 top 10 list of outbound tourism consumption in the countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

Consumption of incentive travel is also an important part in the international tourism niche market that should not be ignored. As the top-level head-capital of international exhibitions, Singapore attracts over 20% business tourists among the total number of tourists, with over 5 billion SGD spent annually in this field, accounting for 30% of the total tourism consumption. Starting from 2013, China has been the largest tourist-source country to Thailand in MICE Tourism. Among them, the outbound tourists for MICE Tourism from Beijing, Shanghai and Guangzhou have created extremely high consumption value for Thailand each year. In addition, Shenzhen, Qingdao, Hangzhou and Suzhou have recently become the emerging output cities of tourists for MICE Tourism, whilst the hidden potential to develop the market of MICE Tourism is actually stupendous in China's second and third-tier cities.

2.6 China tops the list of outbound tourism consumption in all countries, and the consumption of several countries remains steady

The Top 10 countries of outbound tourism consumption remain relatively steady, with China topping the list. China has contributed 1/3 of the outbound tourism consumption in the countries along the route of B&R (Chart 2-15). Singapore, Malaysia, Indonesia, Poland, Philippines and several other countries

also stay stable on the Top 10 list. However, Singapore, Malaysia and Indonesia are experiencing a slight reduction, whilst the rank of Philippines fluctuates over the years and Poland grows modestly in the process. Vietnam, which joined the list in 2015, has been growing evenly. Despite the small fall occurring due to the epidemic, the situation as a whole still manifests a quick and fierce development tendency. India keeps rising in the rank step by step. It has been in the second position in three successive years.

3. Development of Outbound and Inbound Two-way Tourism in Countries along the Route of Belt and Road

3.1. Outbound and inbound market continues to broaden, and the increase speed advances with an even tendency

In the year of 2013, the number of outbound and inbound tourists hit 798 million person-times in the countries along the route of B&R, accounting for 36.38% of the global outbound and inbound tourism. During the seven years' building along B&R, many excellent achievements in the tourism industry have been accomplished. For example, in the year of 2018, the number of outbound and inbound tourists in the countries along the route of B&R exceeded 1 billion person-times whilst in the year of 2019, the number reached 1.121 billion person-times (Chart 2-16). Thanks to the enormous market volume, the number of outbound and inbound tourists still continues to grow. In 2017 and 2018, the growth rate reached 9 % with an annual increase speed of 5.87%. China, Russia and Turkey have topped the first three positions in the number of outbound and inbound tourists in the countries along the route of B&R, whilst Greece advances steadily in the rank at the same time (Chart 2-17).

3.2 Recreation consumption prevails, and the Southeast Asian countries are on the ferocious rise

One third of the global outbound and inbound tourism consumption is generated from the countries along the route of B&R, and the average total amount has reached 1000.7 billion USD (Chart 2-18). Among them, the consumption of



Chart 2-16 The number of outbound and inbound two-way tourists in the countries along the route of B&R from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

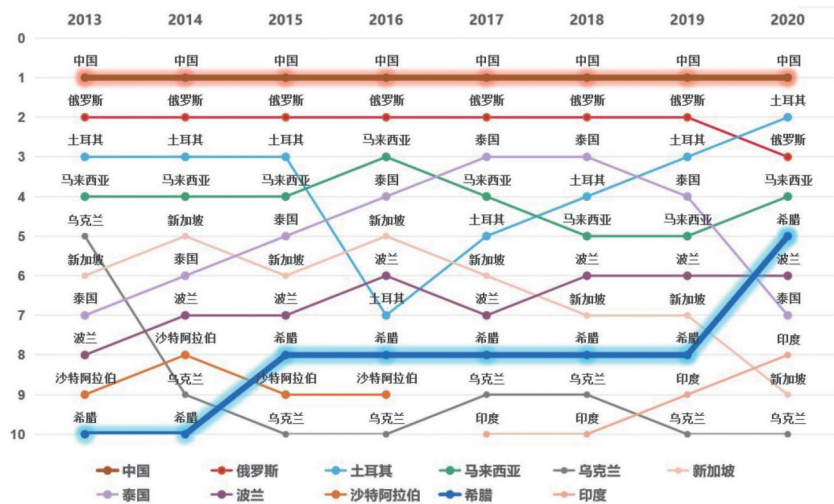


Chart 2-17 2013 to 2020 top 10 list of the number of outbound and inbound two-way tourists in the countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

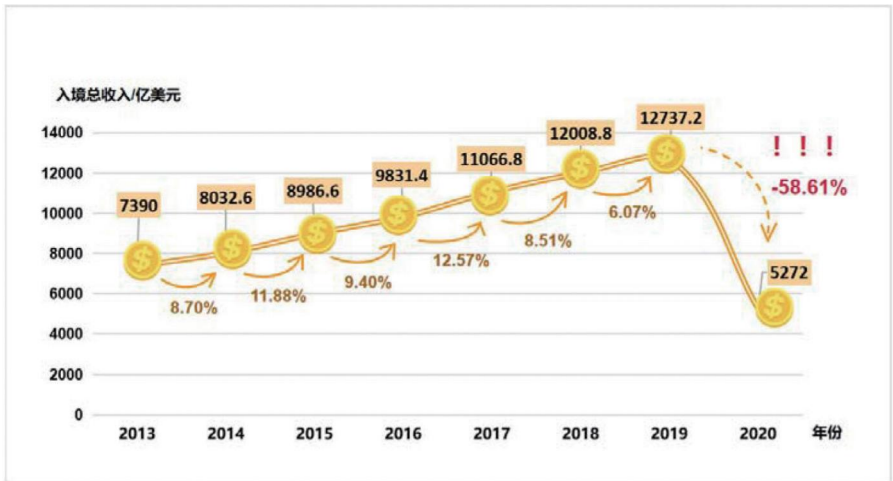


Chart 2-18 The consumption amount of outbound and inbound two-way tourism in the countries along the route of B&R from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

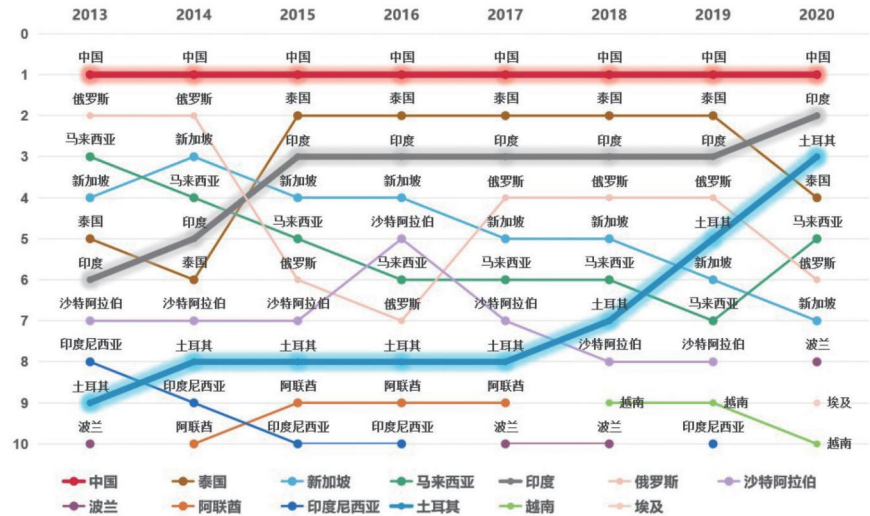


Chart 2-19 2013 to 2020 Top 10 list of consumption amount of the outbound and inbound two-way tourism in the countries along the route of B&R

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

outbound and inbound recreation travels is averagely 808.795 billion USD, which is four times more than that of consumption of outbound and inbound business travels. Currently, there are 15 countries with a market scale in outbound and inbound travel consumption that has exceeded 20 billion USD. Apart from China, Russia and Turkey, the other countries are mostly located in the Southeast Asian region (Thailand, Singapore, Malaysia, Vietnam, Indonesia). China becomes first on the Top 10 list of consumption amount, whilst India and Turkey, which have firmly clung to the development opportunities, get their outbound and inbound consumption market to be continuously expanded (Chart 2-19). Singapore, Russia, and Malaysia have inevitably had a position on the top 10 list, yet their ranks are obviously dropping. Affected by COVID-19 epidemic in 2020, Saudi Arabia has directly fallen out of the Top 10 list.

4. China's Profile in the Tourism along Belt and Road

4.1 China has become a popular travel destination, and business travel market is in urgent need of promotion

China carries a big weight in the tourism along B&R, and it is a huge tourist-source country as well as a popular travel destination for many countries. During the building process of B&R, China has received 476 million person-times of international inbound tourists, among which 83.51% are on recreation travel whilst 16.49% on business travel, gaining an annual average foreign inbound income of 777.67 billion USD and topping the first in the B&R tourism market. Vietnam, Russia, Mongolia, Malaysia, Philippines and Singapore are the five major inbound tourist-source countries of China in B&R market. They have introduced inexhaustible vitality into Chinese inbound tourism market, by bringing a year average number of 9.23 million tourists into the land. Although China continues to be the largest market of inbound business travel, yet the number of foreign tourists on business travel to China is gradually declining whilst the number of inbound business travels to most other countries is growing properly and evenly (Chart 2-20). It should be an issue to be pondered over in the aspect of China's inbound tourism, when it comes to how the advantage of B&R framework can be



Chart 2-20 The number of inbound business tourists in China from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International



Chart 2-21 The average number of inbound tourists in Chinese cities in the countries along the route of B& R from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

put into full play so business travel can be highlighted whilst the recreation travel is developed vigorously at the same time.

4.2 All types of tourists are well received, and Shenzhen becomes the favorite destination

In 2019, the number of tourists in group travel, family travel and couple travel to China reached 15 million, and for the past six years, China has been

the favorite travel destination for them. Compared to Beijing and Shanghai, international inbound tourists tend to have a preference for Shenzhen and Guangzhou, with the former receiving a yearly average number of international tourists for 12 million person-times. Known as the Exotic City, Shenzhen becomes the only city in China that has taken in more than 10 million international tourists (Chart 2-21). Hangzhou, thanks to the construction of Oriental Leisure City, receives more inbound tourists than Suzhou in 2017, and hops to become China's seventh city that receives the largest number of inbound tourists in the countries along the route of B&R.

4.3 Outbound business market contracts, and companionate travels become the first choice

China's outbound travel market is larger in scale than that of the inbound travel market, with an annual average number of outbound tourists exceeding 80 million. Compared to the inbound market, business travels account for a conspicuously vast outbound market share, averagely 30% to be exact. Although the absolute amount is on the rise, yet in common with the inbound travel market, the business niche market is still contracting. When it comes to the aspect of risk resistance capability, the capability of business travel obviously excels that

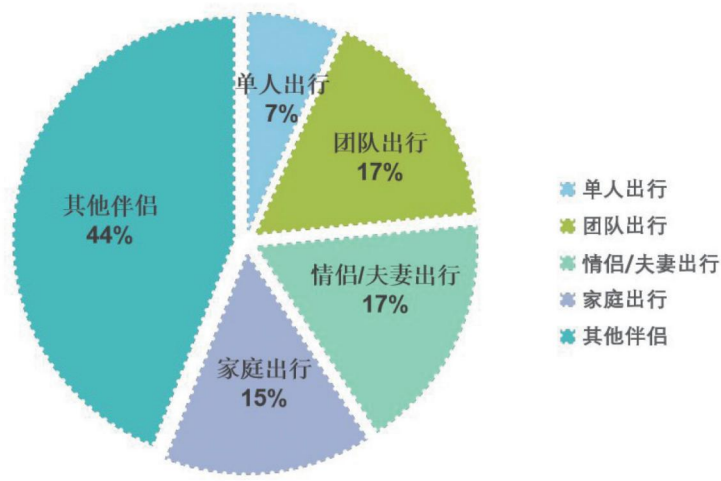


Chart 2-22 Chinese tourists' choices of companion for outbound travels

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

of recreation travel. Due to the impact of the present epidemic, the market share of business travels does not reduce but increases instead. Yet as the recovery of recreation travels starts, it is still unknown whether or not the business market is able to get through the pressure. Chinese tourists keep a relatively even proportion in choosing companions, namely family members, partners and groups, and solo travels still remain low in market acceptance. (Chart 2-22).

4.4 Buying stuff remains appealing, and high-quality consumption becomes a new prevailing trend

In the year of 2019, the outbound consumption done by Chinese residents reached 1238.8 billion CNY, which was 1.4 times more than the foreign income of tourism. Two conclusions are drawn, based on the situation that China's outbound and inbound travel consumption used to be basically equal and now outbound consumption excels instead. The first aspect is that Chinese economic capability proves to be developing rapidly and Chinese folk's life quality as well as their consumption capability is rising tremendously. The other aspect is that we should be alarmed about the sustainable development of China's inbound travel market. In the aspect of outbound travel consumption, shopping, which accounts for 33.9%, is still the largest consumption market created by Chinese tourists, though the overall proportion has the tendency of shrinking. In the meanwhile, tourists are more willing to spend more on accommodation, so as to experience services with



Chart 2-23 The proportion of outbound travel consumption by Chinese citizens

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

a much higher quality (Chart 2-23). The expenditure in catering, transportation, sightseeing and entertainment as well as one-day outings is relatively steady, with no conspicuous extent of change in the market area.

4.5 Travelling by air and on highways is evidently advantageous and railway system for travelling gets gradually improved

In the aspect of outbound travelling modes, Chinese railway ranks second among 31 countries along the route of B&R, accounting for an average percentage of 16%. That is an achievement worth acknowledging for a country with a massive outbound travel volume. From the aspect of choices made domestically, travelling by air and on highway are still the dominating modes in outbound travel, but the number of outbound tourists that choose the railway has a tendency of gradually expanding (Chart 2-24). In recent years, the layout of Chinese railway has been enhanced in all directions, which covers an even bigger and more comprehensive range. Thanks to the overall expansion of covering a range as well as further popularization of high-speed trains, travelling by train is getting increasingly important in Chinese people's life. Yunnan-Vietnam Railway, Trans-Asian Railway, China-Kazakhstan Railway, China-Mongolia Railway have made the connection between China and the

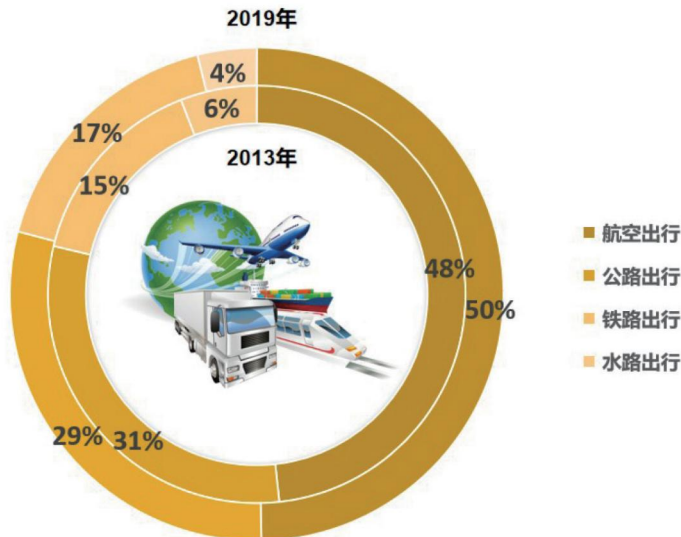


Chart 2-24 The contrast chart of the transportation modes in Chinese citizens' outbound travels in 2013 and 2019

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

neighboring countries get tighter and closer. And China-Nepal Railway and China-Thailand Railway, which are still under construction, should further improve the navigation system of China's international railway. Judging from the current developing tendency, there are going to be even more tourists who choose to travel outbound by trains.

4.6 Southeast Asian countries are much favored, and their cost-effectivity becomes the primary influencing factor

Southeast Asian countries are still the favorite outbound destinations for Chinese tourists. These countries are attractive, because of their pleasant and comfortable natural climate, similar yet different cultural backgrounds and relatively low traveling costs. Thailand has been one of the major outbound travel destinations for Chinese citizens, with an average 8 million person-times heading there each year, a number almost as much as those in Vietnam, Malaysia and Singapore altogether (Chart 2-25). Among the top ten countries, Cambodia is on a gratifying rise and reached an increase of 67.2% in the breakthrough year of 2018, boosting its five-year-long rank of the eighth all the way to the fifth (Chart 2-26). China is the largest tourist-source country for Cambodia, with an average 1.1636 million tourists visiting there each year. Cambodia has permitted and even encouraged domestic tourism companies to accept the currency of Renminbi (CNY), and issued a facilitation policy of a 3-year long visa of multiple entries and exits for Chinese tourists. More direct



Chart 2-25 The top 10 outbound tourism destinations for Chinese citizens in 2019

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

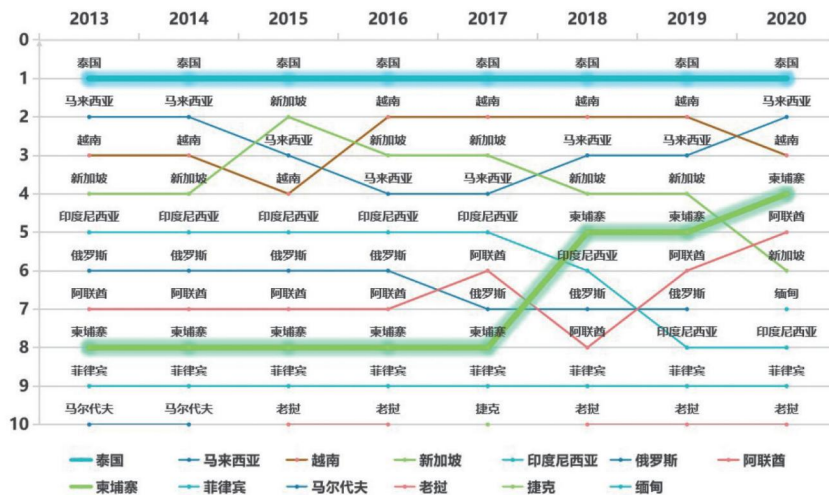


Chart 2-26 Top 10 list of China's outbound travel destinations from 2013 to 2020

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

flights between the two countries have been added, and these beneficial policies for tourism are the key points of how Cambodia manages to hold a tight grip of Chinese market.

5. Tourism Market along Belt and Road under the Impact of COVID-19 Epidemic

At the beginning of 2020, the globe-sweeping COVID-19 epidemic broke out, and the policies for home quarantine froze the global tourism industry, and drove it into a total dilemma. This unexpected epidemic had a severe impact upon the development of the global tourism industry. Although the world has been struggling and fighting in full efforts in the battle against the epidemic, and different industries have resumed to function, yet the recovery of the tourism industry along the route of B&R is still confronted with long-term arduous challenges.

5.1 Outbound and inbound travel market has been reduced by half, and major travel countries suffer from heavy losses

In the year of 2020, the number of outbound and inbound visitors in the countries

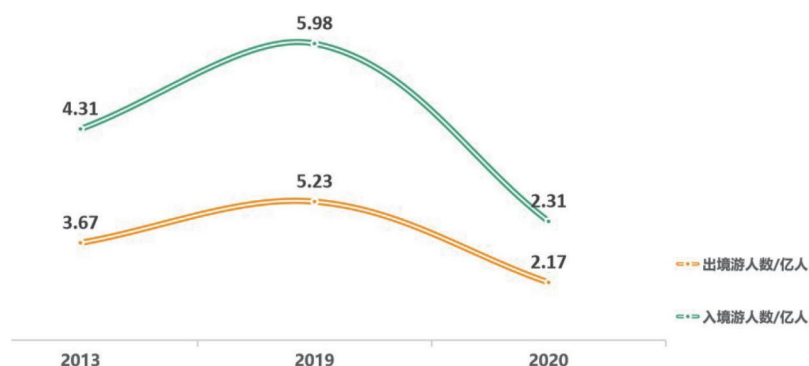


Chart 2-27 The number of outbound and inbound visitors in the country along the route of B&R under the influence of the epidemic

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

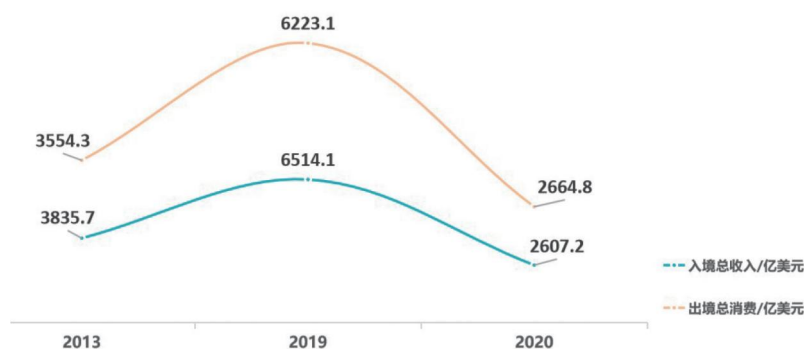


Chart 2-28 Outbound and inbound consumption and income in the countries along the route of B&R under the influence of the epidemic

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

along the route of B&R was reduced by half, reaching a total number of only 447 million person-times. That is 60% less than that in 2013 (Chart 2-27). The consumption market then was equally bleak, as the outbound and inbound consumption as well as income experienced a loss of nearly 60% (Chart 2-28). The countries which gained the largest profits in the past, such as Russia, Thailand, Philippines, Malaysia and India, have gone through very serious losses as well. Small Island Developing States (SIDS), including Bahrain, Maldives and Singapore have lost as much as 77% of the international tourists. That has undoubtedly been a fatal setback for them, especially when their national economy depends highly upon the tourism industry. Although the vaccination process for the COVID-19 epidemic has been put

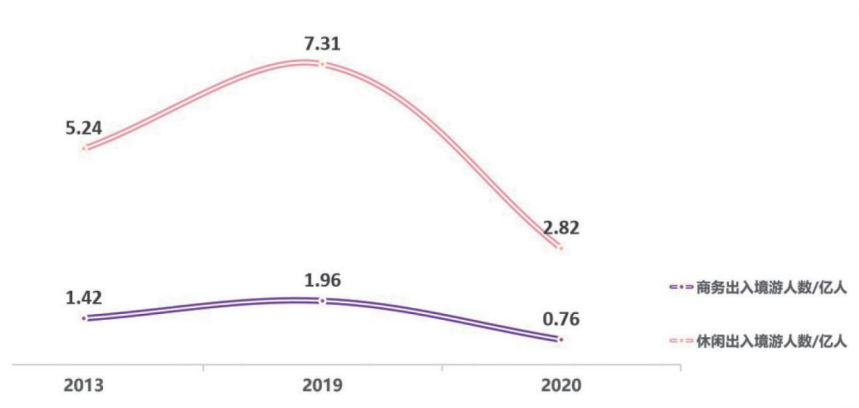


Chart 2-29 The number of inbound visitors for business and recreation travels in the 24 countries along the route of B&R under the influence of the epidemic

Source: Chart made in accordance with the data of database from Passport: China - Euromonitor International

into implementation in most parts of China as well as the world, yet there is still a long way to go before international tourism is able to rebound.

5.2 Epidemic brings about special changes, and there is still a long, difficult way to go before tourism industry recovers

During the epidemic time, some interesting phenomena of alternation have appeared in the data of outbound and inbound travels. Take the number of inbound tourists for example, the loss of recreation travel (-64.40%) turns out to be much bigger than that of business travel (-59.15%) (Chart 2-29). Singapore, Russia and Romania have lost 80% of inbound recreation tourists, whilst Turkey has lost 94% business tourists and 93% business foreign income. Luckily, however, the recreation travel market of Turkey is not seriously affected by the epidemic, with only 35% lessened in the foreign income. That turns out to be the slightest fall amongst the top 10 countries in terms of inbound recreation travels during the epidemic time. This phenomenon is tightly connected to the medical tourism that Turkey has made efforts to develop in recent years. Therefore, despite the serious epidemic, there are still patients from the USA, Canada, the UK and Netherlands that come to Turkey for medical and health travels.

The epidemic prevention and control policies that restrict the number of people and contacts make group travel difficult to conduct. But that has one-

sidedly propelled other inbound travel modes, including solo travel, couple travel and family travel instead. During the epidemic, the mode of couple travel has increased by 1.31%, which turns out to be the biggest extent in the past seven years. In the income composition of inbound travels, a fierce increase happens to the hotel industry from the previous 18.19% in 2019 to 24.40%. International travels during the epidemic time, however, are unavoidably limited by the quarantine policy. Therefore, the seven-day, 14-day and even 28-day quarantine time have increased the time cost of travelling to a very high degree, yet it naturally provides opportunities for the hotel industry to rebound. Romania has lost as high as 95% of foreign income in catering, shopping, transportation, sightseeing and entertainment as well as one-day outings. That basically means that the inbound travel market of Romania remains almost completely in a stagnant status.

5.3 Forces are combined to fight against the global epidemic, and hands are joined to get through the hardship in industry.

When the COVID-19 epidemic rages across the globe, the tourism market has been gravely stricken, and offline cultural exchanges as well as cross-border travels have been constantly interrupted. However, different countries have actively adopted a series of measures based upon their own national circumstances. And they have joined hands to propel the recovery of the tourism industry with the assistance of a cooperative framework along Belt and Road.

One of the most significant achievements built along B&R, namely China Railway Express, has become an important logistics channel to transport supplies for epidemic prevention. By the end of March, there had been 11.046 million articles of supplies for epidemic prevention transported through the trains. China works together with partner countries that mutually build B&R, including Indonesia, UAE, Malaysia, Pakistan, Turkey, to carry out joint production of vaccines. In the meanwhile, China and other countries are also expanding cooperation in other fields, including infectious disease prevention and control, public health, traditional medicine, etc. The Chinese government has issued large quantities of people-benefited policies and focused upon building a digital economy-powered tourism industry, so as to move offline events to

online instead. Several non-contact culture and tourism projects, such as cloud performances, cloud exhibitions, cloud live-stream, cloud shopping and so on have been launched. In this way, green consumption is led out, inflow properly controlled, and tourism consumption is stimulated through given coupons. As a result, international cooperation in the tourism industry along B&R has been pushed forward even if the epidemic becomes regular, and a demonstrated role model as well as a referential example has been set to the countries along the route of B&R in terms of how to recover and flourish their tourism industry. All the countries are combining forces to build digital B&R, so as to propel the building of a green-tour digital platform that can be verified and supported by the cross-border health QR code. In this way, travelers can be prevented from getting affected by the virus, and the risk of their getting infected can also be successfully evaluated.

The mode of online + offline two-line interaction was adopted at the 17th China-ASEAN Expo, so Chinese and foreign enterprises had the access to online exhibiting, online dialoguing and meeting, live-streamed promoting and cross-border e-commerce cooperating, etc. The cloud China-ASEAN Expo had several sections available, including China Commodity Pavilion, ASEAN Country Pavilion, Specially-invited Cooperative Partners and B&R International Pavilion. In the meanwhile, link services of globally renowned e-commerce platforms were provided, so viewers had the access to buying commodities from China, the ten countries of ASEAN as well as other countries with one simple click on the Cloud Expo platform. In addition, several events that propelled trade investment were held online at the same time, including docking meetings of cross-border purchases, live-stream sales by influencers as well as introduction meetings of ASEAN products, etc.

The event of 2020 Malaysia China Year of Culture and Tourism· Digital Silk Road emphasized that multiple-field and cross-platform integration and innovation between different business formats should be taken as the carrier, including online animation, online music, online live-streaming, short videos, so as the new functions of culture and tourism industry development in the new era can be sought and explored. In the meanwhile, it was stressed that the international cooperation of digital culture and tourism industry in the countries

along the route of B&R should be pushed forward rapidly, so digital culture and industry communication between China and Malaysia could be promoted. Migu has managed to establish the world's first 5G+4K+VR slow live-streaming show of Mount Everest, creating a breakthrough record of 5G+4K+VR live-streaming upon the highest altitude. During the anti-epidemic period, Migu has built several online sightseeing events, including 5G cloud viewing of cherry blossoms, and provided video-travel experience that is even more immersive and scene-oriented for users.

6. Cooperation Practice of Tourism Market along Belt and Road

As the top-level cooperation initiative between nations, the Belt and Road Initiative has provided excellent leverage for the interconnectivity between countries along the route of B&R, efficiently pushing forward the joint building of a community of shared interests between countries along the route. In the tourism market, with the concept of jointly creating value as the upheld principles, all the countries have been actively intensifying the intercommunicative cooperation within different fields, so as to explore multilateral win-win market development through diversified cooperative mechanisms.

6.1 Joint marketing

Joint marketing and promoting is one of the most commonly-used methods in the cooperation process of the tourism market. By conducting dialogues and building travel platforms between countries, all the countries put their own merits of tourism resources into full play, and compensate for their own drawbacks in the process of market development, expecting to achieve a marketing result of $1+1>2$. Border cities, which possess superior location conditions and the special features of cultural connectivity, can deepen the bilateral cooperation of the tourism market through the building of cross-border tourism cooperation zones.

China and ASEAN have already become each other's important tourist-source countries and destinations, so accelerating the cross-border tourism market communication has been a mutually-shared wish and request of people from

these two major regions. Starting from the year of 2017 when Frontier Tourism Alliance was formed, the China-Vietnam interaction has been increasing day by day. So far, the marketing linkages between various projects have been jointly pushed forward, including cross-border projects of Bailangtan and Chama Scenic Site, China-Vietnam Ban Gioc Waterfall - Detian Falls Cross-border Tourism Cooperation Zone, China-Vietnam Friendship Pass- Friendship International Tourism Cooperation Zone, home-ports and routes of Nanhai International Cruise, etc. Guangxi has also joined forces with Vietnam so as to create international destinations of red-revolutionary tours. Several events, such as China-Vietnam Youth Celebration, Sino-Vietnam Cross Country Mountain Race have been held in Longzhou and Jingxi respectively. The project construction of the red revolutionary tour in the cooperation zone of Jingxi-Mengma and North Slope of Vietnam is advancing, whilst the tourism site of Ho Chi Minh's revolutionary relics is now open to the public. China and Vietnam have been exploring their own essences of tourism resources, and actively searching the shared cultural junctions, so that they can be used as the foundation to build cross-border tourism cooperation zones continuously. In this way, the tourism products designed can not only sufficiently manifest the cultural features of these two countries but also manage to stand in line with the travel request of inbound tourists, as well as demonstrate the maximum effectiveness of joint marketing.

Cross-industry cooperation in the consumption market is also capable of making the travel destinations shine. Qatar has established linkages with many Chinese brands for joint marketing, aiming at attracting Chinese tourists. For example, when Huawei's new phone P30 came to the market, Qatar and Huawei jointly presented Qatar-themed wallpapers as well as a series of new media marketing events. In this way, Chinese tourists are allowed to "meet" Qatar through the presentation of videos and pictures. Qatar has also established cooperation with China's popular cosmetic Marie Dalgar - Marie Dalgar's New Year set box consists of two kinds of tailor-made cosmetics based on Qatar. The product has been exquisite on the external design and package and got strongly identified by the market. That has also successfully brought about people's lively interest towards this mysterious land, Qatar.

Saudi Tourism Authority (STA), together with India's top-notched

online travel agency Travel Boutique Online (TBO) signed a Memorandum of Understanding (MoU), so the destination cultures of Saudi can be developed through the innovation plan over TBO Academy platform. In the meanwhile, Saudi Arabian Airlines and Emirates firstly initiated a new Reciprocal Loyalty Agreement, so as to present even more handy and comfortable service on the flights between the two countries.

2. Brand unifying

Tourism resources are normally considered as a core appeal in a destination, but the profiles of the travel site are considered as the necessary external embellishment. High-quality tourism resources also require scientific integration methods, so the brand of travel sites can be formed properly, and value manifested clearly. A unified brand tends to have a powerful demonstrative effect, since it can build the profile of value that only belongs to the very travel site, intensify tourists' trust towards the destination and solidify their intention of a revisit. Festive events and cultural exhibitions, through the highly experiential host and guest interaction as well as visualized scenes, manage to vividly convey the cultural stories of each country.

China mutually holds the events of Culture Year with several countries and regions, including Central and Eastern Europe, ASEAN, Russia, Nepal, Greece, Egypt, South Africa. As a result, around ten culture communication brands have been successfully formed, such as the Silk Road Journey, China-Africa Culture on Focus, etc. In the meanwhile, a patch of large-scaled cultural festivals and meetings, such as the Silk Road (Dunhuang) International Cultural Expo, the Silk Road International Art Festival, the Maritime Silk Road International Art Festival, etc, have been successfully created. The exhibition with the theme -“Nothing, not even mountains and oceans, can separate people with shared goals and vision”, has been presented in 298 foreign institutes and overseas Chinese cultural centers across the whole globe. It has manifested the brand profile of China in Circle of Friends along B&R.

Turkey has presented a promotional plan with Mesopotamia as the brand, which aims at promoting as well as enhancing the tourism potential of southeastern Anatolia to the world. This kind of brand, which has natural and cultural relics

as the core, is not only highly supported by the powerful resources themselves, but also showcases a very clear and bright profile. It is a tourism brand that contains abundant significance and high tolerance, easy to be expanded and full of potential. China has also signed cooperation documents regarding cultural relics with several countries, including Indonesia, Myanmar, Serbia, Singapore, Saudi Arabia. China, together with Kazakhstan and Kyrgyzstan has successfully got Silk Roads: The Routes Network of Chang'an-Tianshan Corridor included in the World Heritage through joint bidding. These cooperative projects, which are conducted with cultural relics as the base, have laid a solid foundation for the future tourism development of relevant projects.

6.3 Mutual recommendation and introduction of tourist-sources

One of the cooperative methods in the tourism market is also manifested in the aspect of shared market information. Through two-way or multi-way intermediary meetings, tourism enterprises from the tourist-source countries can provide more and focalized tailor-made products to tourists and attach more importance to different niche markets and tourist-source groups. Enterprises of destinations can get even more accurate information about the request and preferences of the tourists, so as to integrate and present their own tourism resources more efficiently. Mutual recommendation and introduction of tourist-sources is a very practical way to fast realize the expansion of the tourism market. As all the countries seize every opportunity to present their own tourism resources, they also look forward to enlarging their tourist-source market as quickly and orderly as possible.

In the year of 2018, most of the provinces and cities in the countries of ASEAN already conducted joint promotion of tourism with several Chinese local tourism departments in places like Beijing, Shanghai, Guangzhou, Nanning and Guilin, with the purpose of mutually introducing their own travel destinations. In 2019, Shanghai signed an agreement with Budapest, Phnom Penh, Bangkok, Chiang Mai, Metro Manila and Jeollanam-do for joint promotion of culture and tourism through sister cities along B&R, aiming at propelling the cooperation between tourism enterprises from the member cities. In 2019, Uzbekistan participated in more than 50 international travel exhibitions, and made an active

introduction of their tourism resources on the international stage so as to present the special features of their home. Hunan Province of China has intensified bilateral promotional introduction, by relying upon a series of international culture and tourism festivals and events, such as Hunan International Cultural Tourism Festival, series of communication events of China-Russia red-revolutionary tour as well as Zhangjiajie International Countryside Music Festival, etc. Guizhou Province of China, on the other hand, has established connections with tourism management departments of several countries in Southeast Asia, and conducted a few events such as mutual recommendation of tourist-sources and product promotions and so on. So far, some preliminary achievements have been made.

6.4. Market facilitation

As the modernization process of the tourism market accelerates, all countries have gradually managed to simplify the procedure of cross-land travel and enhance the efficiency with the help of modern technology. The well-arranged policies between China and countries along the route of B&R in aspects of visa application, border-passing, logistics transporting, tax-refund of shopping, showcase that facilitation has been enhanced little by little, and benefits to the general tourists on both sides have been brought.

Remote visa application for border travels is one of the miniature phenomena that shows the tourism facilitation jointly conducted between China and countries along B&R. Remote application of cross-border travel passes is now available in many places in Guangxi, Yunnan and Heilongjiang. This policy has accelerated the tourism industry development of relevant provinces and municipalities, and propelled the commodity circulation and tourism market prosperity. Cross-border shopping has taken up a large volume in the consumption market of outbound travels, which is also one of the major sources of foreign income in those countries. Therefore, the convenient tax-refund and duty-free policies for shopping have made it possible for tourists to fill up their luggage but also save the spending, showing support for those countries to obtain more market shares in the inbound travel consumption market. Starting from June 1st, 2018, the gross consumption tax of Malaysia has been lowered from 6% to 0%, which basically means that foreign travelers in Malaysia are able to obtain commodities with

an even lower price when shopping. That has undoubtedly injected a boost to Malaysia's inbound consumption market. In November 2018, the UAE also started to implement the plan in terms of VAT refund for tourists, aiming to enhance the country's attractiveness and competitiveness in the tourism industry. Russia has also implemented a tax-refund policy to stimulate the recovery of Russia's retail industry, so international tourists are able to obtain a maximum 18% in VAT refund.

Chapter Three

Tourism Investment Cooperation along Belt and Road

By Zou Tongqian / Ding Yiwen / Chang Dongfang

1. A General Introduction of Tourism Investment Cooperation along Belt and Road

In recent years, the international cooperation of the tourism industry along B&R has been constantly intensified, and the Ministry of Culture and Tourism of the PRC has been actively pushing forward the building of international cooperative key projects starting from the year of 2018. Currently, the tourism scale of countries along the route of B&R has accounted for approximately 70% of the entire global tourism, and the number of bilateral tourism exchanges in China and countries along the route has hit more than 60 million person-times. Obviously, the route of B&R has become one of the most popular regional sites in the international tourism industry. Due to the influence of the COVID-19 epidemic, the total number of global inbound tourists was reduced to 351 million person-times in 2020, tremendously lessened by 74% year-on-year. In 2020, the total income of global tourism was reduced to 2.92 trillion USD, losing 1.3 trillion USD. That indicates one thing - the international tourism industry has been severely impacted. In the aspect of tourism investment income, the decrease in the tourism market of Central and Eastern Europe along the route of B&R has turned out to be the largest. Apart from Hungary, the total income of tourism investment in other countries in 2020 all experienced decreases of different extents. In West Asia and ASEAN countries, the decrease in extent in West Asia regions stays between 7% to 8%, and the increase in ASEAN countries shows

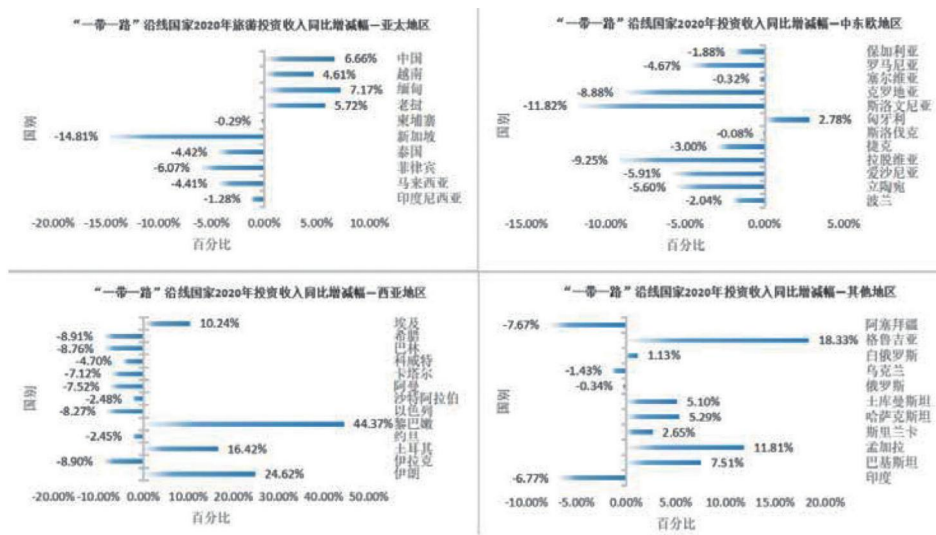


Chart 3-1 The alteration of tourism investment in the countries along the route of B&R under the influence of the epidemic

Source: Gross Income from Investment in all countries from Euromonitor Tourism Database

almost no difference. However, the income of tourism investment in Singapore has been reduced by 14.81% year-on-year, which is a result of the serious impact of the epidemic. Compared to the other markets, Central Asia, South Asia and CIS countries have experienced a relatively smaller decrease extent.

When the tourism investment market is analyzed from the aspect of niche industry, it can be seen that the scale of the accommodation and catering industry has shrunk, especially when it comes to the heavy asset like the hotel industry, which has a relatively high liability ratio. Affected by the epidemic, these industries have accelerated the clearing, and may further improve the concentration ratio. The competition between theme parks has been aggravated, as some theme parks have been forced to turn to the asset-light modes of a sole proprietorship, joint ventures and authorization because of the epidemic. The cruise industry has been unprecedentedly lashed as well, as the withdrawal of investors has led to a sharp decline in the market value of many cruise companies, reaching a decreasing extent of 70%, conspicuously higher than that of other operating industries. The airline industry across the globe has been in a downturn, as the recovering processes differ from different places whilst airline companies have to deal with layoffs and take pay cuts at the same time. The OTA industry has an obvious trend of getting intellectualized actively, as some companies have

seized the opportunities of submerged markets by seeking differentiated development, thus recovering fast generally.

2. Cooperation Characteristics of Tourism Investment along Belt and Road

2.1 The investment in countries along the route of the Land Silk Road speeds up swiftly

In the preliminary phase, China's tourism investment along the route of B&R was mostly concentrated in Southeast Asia regions, as those places are geographically close to our country, similar in culture, convenient in transportation, unique in tourism resources and gigantic in tourism economy scale. As a result, China's tourism investment in the countries along the route of B&R has ended up being in a pattern of “strong on sea, weak on land, feverish in east and cold in west”. However, during the past three years, the number of Chinese tourists that travel to Europe has been continuously increasing at a fastest rate of over 20%, mostly in several countries along the route of B&R, namely Morocco, Croatia, Hungary. In the meanwhile, some countries in Central Asia such as Uzbekistan and Kazakhstan are constantly improving their visa policy, transportation facilities, and health security, whilst China and foreign countries have also been deepening the discussions of communication cooperation issues with “tourism investment and regional development” as the theme. Subsequently, the Silk Road Journey International Tourism Exhibition as well as World Federation of Tourists Cities meeting has been actively promoted and held, so a proper tourism trading environment has been further created. In the meanwhile, some industrial formats, including travel shopping, cultural exchanges, financial services and travel health & therapy, have also drawn the attention of tourism investors from all the countries.

The tourism investment events along B&R are in a spatially tight connection with the popularity of travel destinations along B&R. Generally speaking, Southeast Asia regions are still a region along the route of B&R that attracts dense tourism investment. However, starting from 2018, relevant enterprises have constantly been accelerating the tourism cooperation in Central Asia as well as Middle East regions, so the Land Silk Road

investment projects from tourism enterprises have obviously increased in quantity.

2.2 Investment fields shifting from the traditional tourism formats to the new

China's tourism investment along the route of B&R has always been concentrating upon the tourism fields, such as hotels, agencies and catering, or even other aspects including travel management and consultation, visa services, duty-free products, catering management and investment, etc. However, starting from the year of 2017, overseas investment events in the industries of real estate and hotels have been strictly controlled and limited. In 2018, the hotel industry was included in the Catalogue of Sensitive Industries for Overseas Investment. As a result, tourism investment along B&R has been thoroughly differentiated, so some tourism investment fields that lack technical thresholds, background requirements but prove to be similar financialized, have become conspicuously stagnant. However, some new formats that can possibly propel industry and consumption to update have started to draw continuous attention. Some business giants with a radical investing style, including Wanda, HN Airlines, Anbang, etc, have also been making attempts to sell their overseas real estate properties and hotel projects, but shifted to build several emerging industries such as cultural tourism zone, airline travels and so on instead.

According to the key projects list of international cooperation in the culture industry and the tourism industry along B&R issued by the Ministry of Culture

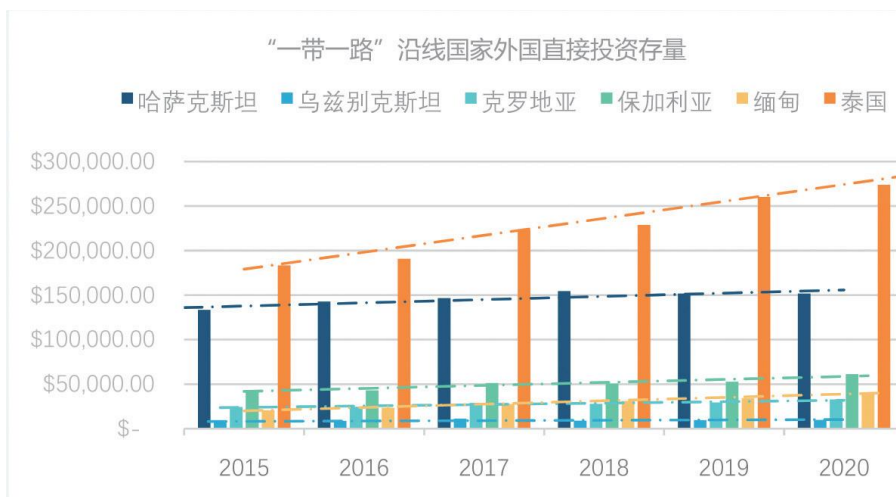


Chart 3-2 Foreign direct investment inward stocks in the countries along the route of B&R

Source: Foreign Direct Investment Inward Stocks in all countries from Euromonitor Tourism Database

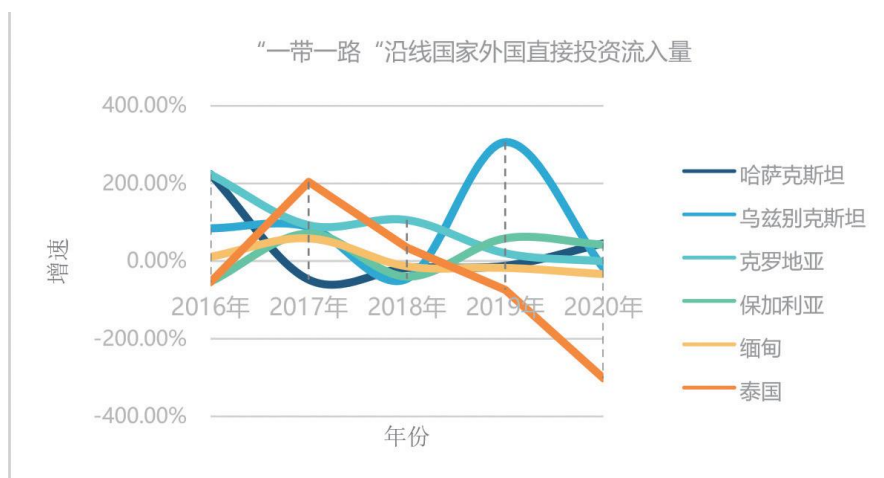


Chart 3-3 The alternation of investment stocks and inflows along B&R

Source: Foreign Direct Investment Inflows in all Countries from Euromonitor Tourism Database

and Tourism of PRC in 2020, it can be analyzed that investment directions of new projects deal with several industrial fields, including digital culture and tourism, themed recreation, travel performances, cultural equipment to name but a few. In the meanwhile, the Ministry of Culture and Tourism is also going to offer support in various aspects, including investing and financing, promoting and marketing, information service, personnel training, etc. The Ministry is even going to assist these projects to obtain supporting policies from different channels and to build multi-variant cooperative bridges so as to promote the implementation of relevant projects.

Table 3-1 2020 Key Projects List of International Cooperation in Culture Industry and Tourism Industry along Belt and Road by Ministry of Culture and Tourism of the PRC (excerpt)

Number	Submitting Place	Project Title	Bidding Institution
1	Beijing	Projects for the Culture and Tourism Cooperation Information Service Platform for Countries along the Route of Belt and Road	China Economic Information Service Co., Ltd

Connect the table

2	Beijing	Digital Olympia Promotion Project of Digitalizing Archaeological Site of Olympia	Beijing Tsinghua Heritage Institute for Digitization Co.,Ltd
3	Hebei	<i>To discover Cambodia</i> Culture and Creation Cooperation Development Project	Langfang 100 Theater Management Service Co.,Ltd
4	Shanghai	“Creation of Twin Cities and Ingenuity Work” Handicraft Sales Exhibition Service	Shanghai Creative City Technology and Development Co.,Ltd
5	Shanghai	<i>Our Common Homeland</i> Commercial Tour in Russia by Shanghai Chinese Orchestra	Shanghai Chinese Orchestra
6	Jiangsu	Hundred-Craft Culture Creation and Design Cooperation Development	Jiangsu Hundred-Craft Culture and Science & Technology Co.,Ltd
7	Jiangsu	Kenya Ecological Culture and Art Engineering Project	Artall Culture Group
8	Jiangxi	Design Development and Promotion of Ceramic Culture Creation Products for Countries along the route of Belt and Road	Jingdezhen Ceramic Institute
9	Hunan	Comprehensive Service Platform of the Art Travel for Arab Countries	Tangel Culture Co.,Ltd
10	Hunan	Comprehensive Operation Platform of Culture and Tourism Industry International Cooperation for Countries along the Route of Belt and Road	Hunan SMJM Media

11	Hunan	Kenya- Central Africa Art Corridor	Hunan Hecun Agric-Technological Development Co., Ltd
12	Guangdong	Shenzhen Culture Expo · Cloud Culture Expo B&R International Pavilion	Shenzhen International Cultural Industries Fair Company
13	Guangxi	Multilingual Promotion Platform for Travel Information	Guilin China International Travel Service Co., Ltd
14	Guangxi	Supporting Platform of Tourism Resources Service for Countries along the Route of Belt and Road	Guilin Tang Dynasty Tours Co.,Ltd
15	Sichuan	Creative Design Promotion of Lantern Art for the Countries along the Route of Belt and Road	Zigong Haitian Culture Co., Ltd
16	Sichuan	Chengdu International Art Center for Belt and Road	Chengdu Chanson Culture Communication Co., Ltd
17	Sichuan	<i>Angkor Dynasty</i> Large-Scaled Culture Travel Integrated Organization	Deyang Meiyi Culture and Travel Development Investment Co., Ltd
18	Sichuan	Sichuan Gifts Overseas Marketing and Promoting	Chengdu Lvzhou Culture Tourism Investment Management Co., Ltd
19	Guizhou	Tour Performance of Chinese Music in Countries along the Route of Belt and Road	Guizhou New Style Media Co., Ltd
20	Yunnan	Laos Modine Special Economic Zone Global Tourism Project	Yunnan Jinglan Cultural Tourism Group Co., Ltd

Connect the table

21	Xinjiang	Shared Platform of Children's Education and Entertainment Digital Culture and Tourism for countries along the Route of Belt and Road	Xinjiang Huate Information Net Co., Ltd
22	Xinjiang	Dubai Silk Road Performing Arts and Cultural Industrial Park	Xinjiang Silk Road Longtian Holding Group
23	Xinjiang	Multilingual Phone App and Researches on Cultural Tourism on the Silk Road	Urumqi Xinyuedu Culture and Technology Co., Ltd
24	—	Project of Chinese Style Digital Art Exhibition	Shanghai International Culture Equipment Industrial Park Management (Group) Co., Ltd
25	—	Marketing and Promoting Series Events for the Silk Road Digital Cultural Tourism	China Culture and Entertainment Industry Association
26	—	“Rising Tide in the East on the Art Road” Culture and Tourism Industry International Cooperation Project	China Oriental Performing Arts Group Co., Ltd
27	—	Culture and Tourism International Marketing and Distribution Studies for Countries along the Route of Belt and Road	China Tourism News
28	—	Culture and Tourism Marketing Service for the Countries along the Route of Belt and Road	Beijing Xinglv International Media Co., Ltd

Source: Official Website of Ministry of Culture and Tourism

2.3 The proportion of investment by atypical tourism companies and private companies increases

In recent years, social capital has shown high enthusiasm in cross-border investments. The principal entities of tourism investment along B&R not only include several typical enterprises, such as China Tourism Group (Hong Kong) and China Tourism Group (International Travel Service) of which tourism is the main business, but also include some state-owned companies such as China City Construction Holding Group Company as well as China Harbor Engineering Company Limited. They, together with some emerging culture creation companies have all joined the group of overseas tourism investment. These atypical tourism enterprises are able to provide supporting auxiliary services for their main business of tourism, to promote the expansion of direct investment and the scale of contracted cooperation whilst injecting new vitality and liveliness into the international tourism market. In the meanwhile, the proportion of privately-owned companies take up in tourism investment along B&R has been gradually increased. Some enterprises, such as Jinjiang International, Wanda Group, Overseas Chinese Town Enterprises, have manifested intensive strength in investment capability and overseas operating ability. They have played a very important role in internationalized strategies, such as innovating tourism investment formats and deploying a large tourism ecosystem.

2.4 A two-way entry mode of structured equity investment and non-equity investment is adopted

The mode of private equity investment has been the most commonly used in the early stage of China's tourism investment along B&R. Take the investment of economic hotels and the investment of online travels in Southeast Asia for example, domestic enterprises have obtained strong autonomy through equity mergers and acquisition, and quickly managed to take over the market in the host country. However, there has been a relatively high risk in the aspect of economy, management and culture, whilst the rapid expansion of local market share may possibly bring about insufficient development potential and excessive debt so that the advantages of competition are ultimately lost. During the period of the Fourteenth Five-Year Plan, large-scale mergers and acquisitions, strategic cooperation with the opening

franchise rights as the program as well as other modes such as tourism e-commerce investment, management output, tourism industry park investment, are going to become the new choices for cross-border tourism investment. That is going to be of great significance for domestic investment companies in enhancing the capabilities of tourism market deployment along B&R and achieving development of high-quality markets as well as supply-side construction.

2.5 Diplomatic relations affect the location selection of outbound investments

The countries along the route of B&R are diverse in social forms, and their bilateral diplomatic relations with our country are highly unstable. That has cast an impact upon our country's location selection in the outbound tourism investment. For example, ever since October 2016 when President Duterte visited China, the China-Philippines relation has gone through three phases, namely turnaround, consolidation and improvement, whilst the cooperation in tourism infrastructure investment and tourism transportation field have also been on an active and positive rise. Currently, the good-neighborly, friendly and cooperative relations between China and ASEAN are walking into a new phase. With RCEP formally signed, the level of investment liberalization between China and the 10 ASEAN countries has been gradually enhanced. That should be conducive to promoting the formation of regional economic development and regional integration, so that the establishment of China-ASEAN bilateral and multilateral cultural tourism cooperation mechanism is pushed forward. One thing has been shown from there - the bilateral and multilateral diplomatic relations between the host country and neighboring regions are significantly influential on our country's location selection in tourism investment.

3. The Risk of Tourism Investment along Belt and Road

3.1 Turbulent and complicated international politics and security circumstances double the risk

The countries that participate in the tourism investment building along B&R are mostly located in some relatively backward regions in Southeast

Asia, Central Asia and West Asia. The national political environment of those countries is extremely complicated, and governmental transparency is in urgent need of improvement. Therefore, there are many political risks existing there, such as the frequent alternation of policies, intervention of external forces and social transformation. Other security issues, such as violent terrorism, national separatism, and religious extremism, also bring about problems. As the global economic environment deters, these risks that have been previously alleviated under a better circumstance, start to spill out at the moment. That is causing great uncertainty for investing companies. In the meanwhile, as the tide of “anti-globalization” surges on, unilateralism and trade protectionism are also on the rise, and the trade disputes such as Sino-US economic and trade frictions have exerted weighty pressure on the operation of Chinese export-oriented private enterprises. By promoting the Economic Prosperity Network plan, the USA aims to disintegrate B&R from a geopolitical perspective and exacerbate the economic decoupling between countries. That will undoubtedly have a profound impact on the promotion of international investment cooperation along B&R in various aspects.

3.2 The credit rating of host country is downgraded, and the risk of debt default increases

Based upon the impact the epidemic casts on the economic and financial conditions of all countries, companies of international credit quality rating have downgraded the sovereign ratings of some countries along the route of B&R. The transaction prices of sovereign debts in the financial market have also showcased that the debt default rates of some countries are on the immense rise. The following table shows the current ratings of countries along the route of B&R made by Standard & Poor's, which is the world's largest rating company. Among the 66 countries (China included), seven countries possess excellent credit with a rating of AAA to AA (the highest investment grade), 18 countries possess the sovereign rating of A + to BBB (investment grade) whilst 41 countries possess a grade of BB+ and below in credit quality rating (namely non-investment grade) or even lack S&P ratings. Among them, Lebanon has been downgraded from CCC level to SD (selective default) whilst India, Kuwait, Slovakia and Sri Lanka have

all been reduced by one grade.

That phenomenon appears, mainly because some projects have been suspended due to the control measures adopted by various countries for the prevention and control of the epidemic. Consequently, the project income has decreased, and the government of the host country suffers from an increasing fiscal deficit. Loan payment of projects, the return of investment, and the accounts receivable return of contracted projects are undergoing hardship as well. In addition, some projects, especially projects in Africa, are also subject to the currency control of the host country, making it impossible for them to get the profits and income exchanged and remitted as scheduled. Or, they are also left to be confronted with the trouble of reinvesting profits. Judging from the interaction between the tourism industry and the macroeconomics, the market foundation of the demand-side has been a necessary condition for the recovery of the tourism industry, and the prospects for reshaping the tourism industry in the future are closely related to the resilience and stability of the macroeconomics of all the countries.

Table 3-2 S&P Ratings of Countries along the Route of Belt and Road

Ratings	The Number of the Countries along the Route of B&R	The Countries
AAA	1	Singapore
AA-	6	Israel, Qatar, Czech Republic, Slovenia, Estonia, Kuwait
A+	4	China, Latvia, Slovakia, Lithuania
A-	3	Saudi Arabia, Poland, Malaysia
BBB+	2	Thailand, Philippines
BBB	3	Bulgaria, Hungary, Indonesia
BBB-	6	Russia, Croatia, India, Kazakhstan, Cyprus, Romania
BB+	2	Serbia, Azerbaijan

BB	2	Georgia, Vietnam
BB-	4	Bangladesh, Greece, Oman, Macedonia
B+	5	Turkey, Bahrain, Jordan, Albania, Montenegro
B	5	Ukraine, Egypt, Bosnia and Herzegovina, Belarus, Mongolia
B-	3	Iraq, Pakistan, Sri Lanka
NR	1	Cambodia
SD	1	Lebanon
	18	Bhutan, Uzbekistan, Yemen, Armenia, Iran, Syria, Kyrgyzstan, Turkmenistan, Tajikistan, Nepal, Palestine, Moldova, Brunei, Myanmar, Laos, Afghanistan, UAE, Maldives
总数	66	

Source: Bloomberg

3.3 The asymmetric legal information generates the risk of investment compliance

Most of the countries along the route of B&R are emerging economies as well as developing countries, where the laws and regulations in the fields of infrastructure and trading investment are still yet to be perfected. What is more, due to the uniformity of national legal standards, investment companies are often faced with sanctions risks in terms of project compliance, human rights, taxation, and intellectual property rights, etc. That phenomenon is mainly manifested in the following situations - Many companies are defrauded for their properties by local illegal businesses that make use of legal loopholes, since they fail to understand and adapt to the laws of the host country within a short-term and are unable to prosecute for the frauds at all.

In the meanwhile, the judicial environment in some countries is relatively terrible and the awareness of social contracts turns out to be vulnerable. As a result, major litigation, litigation threats or major legal flaws may possibly be existing among joint-venture partners. However, due to the limited authenticity and transparency of investigations, the investors may not be able to discover the potential legal risks of the target project or partners in a timely manner, so that the subsequent business development gets affected and restricted.

3.4 Great uncertainty exists in the global epidemic, forming a risk for recovery

The world-sweeping COVID-19 epidemic has had a huge impact on the global industrial chain, value chain and supply chain. As the downward pressure of the world economy continues to expand, new crises and challenges have been brought about to the global tourism industry at the same time. According to the latest statistics data from World Tourism Organization (UNWTO), about 1/3 of the world's travel destinations were "completely closed" to international tourists in 2020, whilst control measures were implemented at approximately 1/3 of the travel destinations. In the meanwhile, the number of international tourists has decreased by 1 billion person-times year-on-year with a reduction of about 74%.

Currently, the global tourism industry shows signs of recovery when boosted by the accelerating progress of vaccination and multinational policies. However, there are still uncertain factors existing, such as the rebound and continuous spread of the epidemic. Therefore, governments of all the countries may continue or even strengthen the prevention and control measures against inbound visits. Generally speaking, the major influences the COVID-19 epidemic has cast upon tourism investment along B&R are mainly manifested in the following aspects. (1) Relevant personnel, equipment and supplies of the investment projects may not be able to enter the country smoothly, so the investigation and research, construction and preliminary operation of outbound investment projects are affected. Some intended tourism investment projects, as a result, have been forced to be cancelled, and some projects under construction have been prolonged or even suspended due to the insufficient construction personnel and supply shortages. (2) The epidemic has put global financial markets into a state of instability, where the exchange rate is emotionally linked with market risk. Therefore, overseas investors are

forced to confront violent fluctuations in exchange rates and interest rates. (3) The epidemic has exacerbated the competition between tourism enterprises and markets, so shortcomings such as poor flexibility and weak risk resistance under the single mode of tourism operation have been multiplied. As a result, a series of issues such as the low income of scenic sites, meager profits in hotels, and losses in catering has been fully exposed. In the meanwhile, the epidemic has accelerated the future development of some growing trends, such as the digitization of the tourism industry as well as its online fields.

4. Analyses of Suggestions for Tourism Investment Cooperation along Belt and Road

4.1 The host country – the soft environment for investment should be optimized in all domains

The framework agreement of strategic cooperation between China and ASEAN, Central Asia, the European Union and other regions should be sufficiently utilized. With the original cooperation mechanism as the base, the contents of tourism cooperation should continue to be deepened, mutual visa exemption agreements with more countries should be signed, and more cooperation consensus should be reached. In the meanwhile, the construction of big data platforms for tourism investment along B&R should be intensified, so specific analyses and forecasts on the social and economic environment as well as the investment risks should be conducted in accordance with each country. The development of consulting service agencies for aspects such as financial insurance, information services and other legal, financial, technical relevant fields, should be accelerated, so top-level consulting services can be provided to enterprises. In this way, risk transfer control can be realized through the forming of local business strategies. Policies and measures with a focus upon the recovery of the global tourism industry should be made and released, which should include digital travel passes, international comprehensive tourism funds, traveling guides for tourists, etc.

4.2 Investors' home country - the hub of the tourism industry chain should be developed

4.2.1 The online and offline coordinating mode of operation should be adopted

On one side, in the post-epidemic era, the investing companies should make use of the advantages of Singapore and India in the information technology industry, as well as the preferential policies of Malaysia's multimedia super corridor, so that the development of online tourism investment can be on focus. The advantages of channels and the internet should be sufficiently utilized, so the function of the tourism industry chain hub can be put into full play. In the meanwhile, new technologies and tourist-source markets such as 5G and artificial intelligence should be exposed to the route of B&R, so the facilitation of tourism services can be promoted and the controllability of the tourism market can be strengthened. In the meanwhile, social media of all the countries should be made use of to publicize promotional videos, so that a series of online events, such as international travel exhibition and travel culture week can be held through online and mobile App for the promotion of cultural exchanges and mutual learning.

On the other side, since tourism has been a pillar industry in Thailand, Cambodia, Nepal and several other countries which happen to be the popular travel destinations along the route of B&R and which possess low-cost labor forces and ample holiday travel resources, a systemized tourism IP with multi-zone integration should be built in the key cities of these countries when facing the tourism industry in recovery and the business environment in alternation. Same efforts can be made upon an all-round supporting center with industrial categories such as vacation community, health and therapy recreation, cultural creativity, travel and performing arts, and themed commerce and so on.

4.2.2 Aggregation effect of the tourism industry hub should be put into full play

Some countries in the Middle East region, such as Bahrain and the United Arab Emirates are global airplane centers with excellent strategic location advantages. They possess sound regional business inflow as well as passenger inflow network system, developed economy and complete tourism infrastructure.

Because of the low tariff policy implemented by the government, all kinds of world-famous branded products can be found here. In the meanwhile, the tourism products of those places are also full of their own regional characteristics. The Expo 2020 Dubai (postponed to 2021) has been a worldwide feast with the largest scale since the epidemic broke out. Therefore, this event should be taken as an opportunity, where the entire process of investment all the way from exhibition planning to exhibition management, as well as the investment of shopping and entertainment should be conducted. In the meanwhile, a tourism hub economy in the form of industrial parks in the industrial chain and geographical location should be developed whilst the agglomeration exposure level of the industry should be improved, and regional exhibitions, shopping and entertainment networks should be built.

4.2.3 Between countries-the cooperation mechanism of the third-party tourism market should be further improved

Third-party market cooperation is an important direction for the high-quality co-building along B&R. By conducting cooperation in the third country with the developed countries, the countries along the route of B&R should play a helpful role to guide the developed countries to participate in the building along B&R. In this way, the investment risk of some enterprises in the countries along the route of B&R can be reduced whilst the confusions held within some foreigners regarding the project transparency, funding sources, return on investment along B&R projects can be cleared out. So far, China has already established a cooperative mechanism of a third market with 14 countries, such as France and Italy. By hosting forums and similar events, China and those countries have mutually built cooperation platforms for enterprises and provided public services. Chinese enterprises and French PVCP Group, as well as Italian Gartour, Neos Airlines, Rome Airport and many other travel service providers have begun to walk to strategic industrial cooperation from strategic market cooperation. China and Singapore have also set up workshop groups. In November 2020, the Singapore Tourism Board and Trip.com Group signed a three-year memorandum of strategic cooperation to deepen the communication and cooperation in fields such as travel marketing, travel product and big data.

5. Representative Cases of Investment Cooperation

As the B&R strategy gets gradually implemented, Chinese enterprises have also step by step enlarged their outbound investment through various sides. Following are the mainly manifested aspects.

5.1 Hotel investment

5.1.1 Central location of capitals are on focus, and high star-rated hotels are built

Chinese enterprises tend to place their outbound hotel investment in the central location of a capital city, and most of the hotels are high star-rated ones. Information in Chinese, Chinese cuisines and Chinese-speaking services are often provided inside the hotels, which have become an intermediary platform for Chinese culture to be expanded overseas, and which have also reflected cultural interaction between China and countries along the route of B&R. Typical examples include Beijing Hotel in Minsk of Belarus, Primus Hotel in Phnom Penh of Cambodia, Sule Shangri-La Hotel of Yangon, Peninsula Hotel of Yangon. Take the Beijing Hotel in Minsk of Belarus, for example. In 2012, Beijing Uni Construction Group was contracted to build the hotel, and the whole process lasted for two years. The characteristic elements of both Chinese and Belarusian cultures have been taken into consideration for the construction of the hotel, so the general orientation of the architecture manages to get different cultures mutually recognized. Specifically speaking, sloping roofs as well as white walls with gray tiles that are commonly seen in the traditional Chinese houses, are adopted as the major elements. Those, on the other hand, also stand in line with Belarusians' traditional preference of white color. Small details of the building, such as corbel-steps, abstractly express the elements in Chinese traditional architectures. But the unique artistic conception of black, white and grey in Chinese water-ink paintings, is showcased stereoscopically, with some touch of Chinese red as well as Belarusian local White Birches color added alongside. Soon after the

construction was completed, the hotel was first unveiled to the world as one of the official hotels to host the IIHF World Championship in Minsk in 2014.

5.1.2. Industry undergoes transformation and upgrading, and “asset-light” becomes a boom

With the Belt and Road Initiative as the center, asset-light has become the main theme of the hotel and real estate industries development. Some companies are transformed and upgraded in terms of hotel investment, and promote the outbound expansion of their own advantageous industries through several innovative modes like asset-light. In the year of 2014, S&N Group came up with a decision of shifting its development focus from real estate properties to asset-light output of hotel management. Currently, the Group possesses four brands with totally different orientations, namely the Anandi, the Yuanzhou, the Yiting and the Lucid, and 100 hotels are planned to be added within five years' time. In 2015, Powerlong Real Estate established a new hotel group, and determined to adopt modes of leasing, franchising and export management through the method of asset-light to develop a hotel brand of their own. Directly afterwards, Powerlong has successively launched its own art chain hotel brand and matrix, such as the luxurious brand of Juntel, the Artels Selection with high-end full service as well as Artels with midrange limited service. In 2016, Wanda Hotel took the first step of asset-light output, namely Wanda Realm Wuzhishan^①, which was the first output project successfully launched by the brand of Wanda Hotel & Resort. Greenland Holdings, on the other hand, have reached cooperative agreements of brand management and output with different hotels by constantly promoting asset-light output mode. Starting from March 2019, Greenland Holdings have reached agreements with Siam Property Group of Thailand, DWG of Singapore as well as BNR Asia, aiming to promote hotels of intention with approximately 10 hotels in countries like Thailand, the UK and Japan. In June, Greenland Holdings reached cooperative agreements of brand management and output with 12 overseas hotels, including Gold Coast Hotel Groups of Australia, Colombo Primus Hotel of Sri Lanka, Bangkok Primus Hotel of Thailand and Osaka Q-box Hotel of Japan and so on.

① https://www.xianjichina.com/news/details_272782.html

5.1.3 OYO brought in franchise rights and lease operations

OYO Hotel Franchise has brought in the franchise and lease operations into our country, ushering an OYO boom in the land. OYO Hotel was established by Ritesh Agarwal in the year of 2013 and the brand mainly oriented upon hotels with low prices. OYO had light franchising as a 1.0 version at the beginning, so franchise and lease operations were open to individual hotels without any fees and deposits involved. That made OYO Hotel earn a broad fame in the Chinese market. By the end of 2018, there had been 10,354 hotels that had signed an agreement with OYO Hotel.

The wild expansion of OYO Hotel, deeply alerted several OTA platforms such as Trip.com Group as well as Meituan. There was a long period when OYO became publicly criticized and even got banned by numerous platforms. As OYO was going through prohibition, some OTA such as Trip.com Group Meituan and Tongcheng-Elong started to follow the mode of light franchise and integrate low star-rated hotels in lower-tier cities, without any franchise fees and deposits involved either. Facing such a circumstance, OYO Hotel launched a new mode of 2.0 version, which abandoned the previous mode of earning commission fees, but became a new one that provided merchants with a minimum revenue guarantee as well as a shared part of the revenue that exceeded the guaranteed minimum. This mode of 2.0 version harmed the relationship between OYO and the individual hotel owners totally, as incidents of rights protection kept erupting everywhere. In order to reverse the unfavorable situation, OYO launched a Win-Win Plan, namely the 3.0 version, which eliminated the mechanism of minimum guarantee but stuck to the mode of commission fees. However, it is now a foregone conclusion that OYO fails in its Chinese market. Despite the setback, the case of the OYO Hotel franchise is still considered as a typical example of the investment conducted in China by the countries along the route of B&R, one that has propelled the domestic enterprises to learn and to get updated.

5.2 Duty-free service

5.2.1 China – Hainan free-trade port is constructed, and duty-free afflicted services are on focus

As the Belt and Road Initiative is progressing gradually, the vitality of China's enormous consumption market has been further stimulated. The construction of duty-free shops has been playing an important role in activating

the consumption, and it has drawn the attention of our country as well as our domestic enterprises and the countries along the route of B&R. On June 1st, 2020, The Master Plan for the Construction of the Hainan Free Trade Port came into public. The Plan deals with further adjustments in accordance with the practical circumstances, such as the expansion of the tax allowance of outlying islands, the enlargement of duty-free products varieties, and the cancellation of single-item products limitation, etc. On the very same day, China International Travel Service Limited (CITS) made an announcement that their original Chinese name was changed into China Tourism Group Duty-Free Corporation. The altered name was reviewed and approved by the State Administration for Market Regulation and is now currently used openly. Right now, the development strategy of the company has also been adjusted to focus upon the travel retail business with tax-free service as the core. In the meanwhile, the company has established long-term cooperative relationships with around 300 world's top-level luxurious brands across the globe and provided shopping services of thousands of duty-free products for the tourists. What is more, more than 200 duty-free stores have been set up across the whole country (including Hong Kong, Macao and Taiwan) through the brand of China Duty-Free.

5.2.2 Other countries – cross-border free trade zones are under construction, and duty-free stores are integrated and expanded

Apart from what has been mentioned above, the construction of China-foreign cross-border free trade zones has also become a trend. Take China-Kazakhstan Horgos International Border Cooperation Center, namely the world's first cross-border free trade and investment cooperation zone, as an example. The management mode of “liberalizing border-line” and “administrating separator” as well as the beneficial policies of “in and outside border” has been implemented at the Cooperation Center, which offers commodities that are exempt from custom-duties, value-added tax and consumption tax. Citizens of the two countries as well as a third country, have access to the Center with a valid visa-free passport or a simple border pass, making face-to-face business negotiations and commodity transactions become possible. Some foreign companies have seized the opportunity to open direct flights. For example, the Prague Airport in the Czech Republic

has taken the chance of the opened route of Chinese airlines, and managed to reintegrate and expand the duty-free shops lying sporadically around the airport to a complete 900 m² instead. What is more, Chinese-speaking shopper assistants as well as guiding boards in the Chinese language are equipped to most of the stores, where the products tailor-made for Chinese tourists are also placed in a very conspicuous position in the stores. Apart from that, four Chinese-speaking guides have been assigned to work on the check-in counters. They exist there specially to help Chinese tourists with check-in procedures. In the meanwhile, a third airstrip is under preparation procedure for construction at the airport as well.

5.3 Investment in scenic sites

5.3.1 New fulcrum and new platform are to be built

On one aspect, Chinese companies select the excellent resources and locations for investments by firstly investigating and researching the tourism resources and locations of countries along the route of B&R, so as to further expand China's outbound influence and to build the new fulcrum and new platform of China's outbound investment. Take the experimental zone mutually invested and developed by Cambodia and China, namely The Seven Star Sea Resort, for example. The Seven Star Sea Resort is the first large-scale travel project of a sea resort in Cambodia, which is located adjacent to Sihanoukville and Koh Kong Province on the border of Thailand. The project is orientated to be the investment development platform for China-Cambodia "interconnection and mutual integration" all-round partner strategic cooperation. So, when the project brings more international tourists to Koh Kong Province of Cambodia, it can also serve as a B&R strategic benchmarking project for China to connect Europe, Asia and Africa. The project also aims at building an important industrial base in Southeast Asia for the "going global" strategy of Chinese enterprises, so it becomes an important strategic platform for the international production capacity cooperation of China as well as technology management services to be exported into Southeast Asia. What is more, it has also become a prosperous practical example of the "China-ASEAN" cooperation mechanism and a successful fulcrum case of the Strategic Intercommunication and Interconnection Project in a sub-regional economic corridor in Cambodia. In the year of 2005, the policies for Singapore's foreign investment were changed. The

policies allowed overseas companies to set up branches in their land. Therefore, China Jingye Engineering Company Limited seized the opportunity and opened a Singapore branch in that very year directly. With the excellent performances and deployment of their Chinese headquarter as the foundation, the Singapore branch of China Jingye managed to obtain the highest engineering qualification after the establishment. That made it become the general contractor of Singapore Sentosa Universal Studios, which was officially opened in March 2010. The project of Singapore Universal Studios ushered the international brand and advanced mode of management of China Metallurgical Group Corporation MCC in the field of large-scaled theme park contracted construction, successfully laying a solid foundation for Chinese-funded enterprises in contracting overseas projects. The project of Singapore Universal Studios has ushered the international brand and advanced management mode of China Metallurgical Group Corporation MCC in the field of contracted construction of large-scaled theme parks. That has successfully laid a solid foundation for Chinese-funded enterprises to become the general contractors of potential overseas projects.

5.3.2 Cross-border tourism cooperative zones are expanded

On the other hand, as China is strongly pushing forward the B&R strategy, the function of building the cross-border tourism cooperation zones along the border regions becomes even more prominent. It has provided tourists from our country with the opportunity to have easier access to experiencing various folk customs, but has also presented a more direct and convenient way for foreign tourists to get to know our country. Take Sino-Vietnam Detian-Ban Gioc Waterfall-Cross-border Tourism Cooperation Zone, the first cross-border tourism cooperation, for an example. Detian Waterfall is located at Detian Village of Shuolong Town in Daxin County of Chongzuo City in Guangxi. At the upper stream of the Guichun River (The Quây Sơn River) that flows along the border of China and Vietnam, the Detian Waterfall is tightly connected to Ban Gioc Waterfall of Vietnam, making it Asia's first as well as World's fourth biggest cross-border waterfall, serving as an absolutely valuable sight for tourists. China and Vietnam have both done a large quantity of fundamental preparation work, and enhanced products on their own respective sites, just to make sure the trial operation of the tourism cooperation

zone can turn out well in time as planned. After the construction of the tourism cooperation zone is completed and opened to the public, the tourists should be allowed to watch the Vietnam side of the waterfall from the China side, as long as they go through a simplified border-passing procedure. What is more, tourists also have free access to the sightseeing of the site within a range of 2 kilometers. According to the consensus reached by China and Vietnam, tourists should be allowed to visit Vietnam with a valid passport after the inspection channel. Or, those without passports should also be allowed to get a simplified entry and exit pass for a visit to Vietnam in the Scenic Site Hall. These two methods are both easy and convenient. Thanks to the cross-border tourism cooperation zone, tourists are able to travel to two countries within one day and to experience the different folk cultures in both China and Vietnam.

Guangxi has established international cooperation zones with eight countries of ASEAN, including “Two Countries, Twin Parks” between China-Malaysia (Qinzhou) and Kuantan, China-Indonesia Economic and Trade Cooperation Zone (KITIC), etc, where tourism elements are implanted to promote relevant work. In the meanwhile, the construction of other cross-border tourism cooperation zones, such as projects of Dongxing-Mong Cai and Jingxi-Longbang, has been continuously progressing as well. Guidance and directions have been offered to assist Fangchenggang City, Baise City (Jingxi, Napo) and Chongzuo City in the bidding for the establishment of a national border tourism experimental zone, so that the border tourism experimental zone of Fangchenggang and Chongzuo cities can be built into a border version of nation’s full-region tourism demonstration zone.

Yunnan has been striving to build a tourism SEA of Golden Quadrangle in the China-Laos-Myanmar-Thailand border area whilst actively promoting the establishment of the Lancang-Mekong Tourist Cities Cooperation Alliance. In the meanwhile, Yunnan has signed The Principles of the Lancang River-Mekong Tourist Cities Cooperation Alliance and the Concept Plan for the Lancang River-Mekong Tourist Cities Cooperation Alliance with five other countries (Myanmar, Vietnam, Thailand, Laos, Cambodia) at the Lancang River-Mekong River Basin. Three regions, namely Hekou and Lào Cai of China-Vietnam, Mohan and Boten of China - Laos, Ruili and Muse of China-Myanmar, have been confirmed for a first trail construction of the cross-border tourism cooperation zone.

5.3.3 Theme parks of Belt and Road get popular

Our country has also shown enormous enthusiasm towards investing in theme parks construction. In the outbound aspect, China has invested in the Colombo Port City project in Sri Lanka, which aims at developing symbolic items such as theme parks, ports for yachts, etc. China's state-owned giant of energy, namely Power China International Group Limited, has also started the building of theme parks during the constructing process of Melaka Gateway. In the inbound aspect, Jinshan People's Government signed an agreement with Merlin Entertainments Group of the UK in November 2020. Together with Lego Group of Denmark and CMC Inc, they established a joint-venture that has taken over the investment and construction of Legoland Shanghai Resort, putting in an investing amount of 550 million USD. Lanzhou New Area plans to build a B&R theme park that has an occupation of 1,456 mu (around 970,666 m²) and a floorage of approximately 350,000 m². The items included are as presented follows – Belt and Road Exhibition Center in New Era, World Fair Park of Belt and Road, Folkways Food Street of the Silk Road, Featured Shopping Center of the Silk Road, theme hotels, Administrative Office of Belt and Road Theme Park, Memorial Hall of the Silk Road, the Silk Road Library Entertainment Park of the Silk Road, China Belt and Road Exhibition Park, etc.

5.4 Cultural performances

5.4.1 The essences of traditions are assembled and intertwined

On one aspect, artistic performance should integrate the cultural essences of each country whilst embracing their exotic and special cultural symbols with the cultural background of the countries along the route of B&R as the background. Take Angkor Dynasty, the project that has permanently landed in Sichuan Province, for example. The project takes the large-scale epic stage play titled Angkor Dynasty as the core, and incorporates different formats, including modern grand theater, water world, food land, and Cambodian folkway street, into one entirety. Among them, the epic stage play Angkor Dynasty has successfully combined Fairy Dance, which is the Cambodian intangible cultural heritage, as well as multiple intangible cultural heritages of China together, so that abundant

inspirations of creation by artists in arts, acrobatics, dance, music, stage design and costumes, are assembled into one whole play that describes the natural sights, folk and cultural scenes of Cambodia during the Angkor time.

5.4.2 New type of works should be discovered and integrated

On the other aspect, some works manage to bring about brand-new and completely unique on-site experience to the audience, through firstly discovering similarities and differences between traditional cultures, musical instruments of all the countries and then incorporating and combining them together later. Take Our Common Homeland by the Shanghai Chinese Orchestra, for example. The main creative team have explored and studied the structure characteristics and performing modes of some well-known Chinese musical instruments such as bamboo flutes, erhu (spike fiddle) and pipa (Chinese lute) as well as other world's folk musical instruments from five continents, so that they have successfully created performing works with multivariate elements incorporated, such as Treading Waves, Meetings, etc. Currently, Our Common Homeland by Shanghai Chinese Orchestra for the commercial tour in Russia has been included as one of the key construction projects along B&R.

5.5 Online platforms

5.5.1 The existing platforms are acquired to become the new hub

It has been one of the major choices for many enterprises to acquire the existing online platforms so as to expand their outbound online business. As B&R strategy gets further promoted, outbound tourism for holiday has become a very popular choice for Chinese tourists. With such a circumstance as the background, Chinese enterprises, apart from investing in offline hotels, scenic sites and performances, have also enlarged their online business. Currently, there are two leading popular means – one is to acquire the locally existing platforms and make them a hub company, and two is to develop independent new platforms. In the aspect of acquiring existing platforms, that Lvmama.com bought out the biggest Chinese service station at Boracay in the Philippine should be taken as an example. The newly acquired company has been renamed as Lvmama Boracay Chinese Tourist Center, which not only offers Chinese consulting service of local

entertainment products such as diving, motorboats, and sea outgoing, but also introduces the advanced fast-pass technique on scenic sites into the local area. It is expected that Chinese tourists that receive service from the company in the future are able to travel across Boracay with only one single mobile phone. Also, using Renminbi to pay through scanning the QR code on the phone is also going to be available in Boracay, just as how that is done in China. In this way, currency exchange in advance becomes an unnecessary step, and the exchange fees are avoided as well.

5.2.2 New platforms are developed independently

Many companies have also chosen to independently build and expand new platforms. According to the List of Key Projects in International Cooperation along Belt and Road in 2020, nine projects out of the 45 established ones are classified as building tourism platforms. And those projects cover various fields for the countries along the route of B&R including content distribution of digital culture, digital culture and tourism for children's education and entertainment, art travel, international cooperation of culture and tourism industries, information service for culture and tourism, trading of cultural artworks, recommendation and introduction of travel information as well as services for travel resources and so on.

Chapter Four

Big Data Analyses of Tourism Public Opinion on Belt and Road

By Li Ying

The Public's Concern for Tourism along Belt and Road

1. 1 The global public concern for Belt and Road has been on continuous rise since 2015

Stupendous changes have happened to the global public's concern for Belt and Road. Starting from the year of 2004, the trend has been on a rising trend before declining. From 2004 to 2014, the globe's concern for B&R was relatively small. But starting from 2015, the concern started to grow increasingly big and reached the peak in the year of 2019, before slightly declining. A significant turn occurred in the year of 2015, when the globe started to show increasingly much concern for B&R, mostly thanks to China's active proposal and promotion. In September 2013, President Xi Jinping of the PRC made a cooperative initiative of building the New Silk Road Economic Belt whilst in October of the same year, the cooperative initiative of the 21st Century Maritime Silk Road was advocated. That symbolized a formal presentation and active propelling of the Belt and Road Initiative. On March 28th, 2015, To Promote the Visions and Actions on Jointly Building the Silk Road Economic Belt and the 21st Century Maritime Silk Road was jointly launched by National Development and Reform Commission, Ministry of Foreign Affairs of the PRC and Ministry of Commerce of the PRC. After the economic zone of Belt and Road was opened, 3,000 engineering projects have been contracted. In the year of 2015, Chinese enterprises made direct investments in 49 countries along the route of Belt and Road, with an increased investing rate

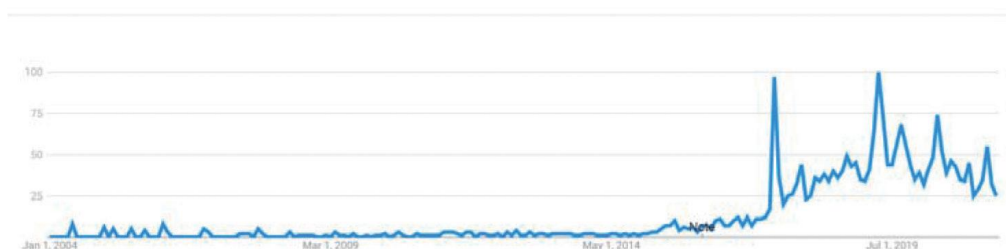


Chart 4-1 The globe's concern for Belt and Road

Source: Google Trend

of 18.2% year-on-year. In 2015, the service contracted projects taken over by China in B&R-relevant countries achieved an amount of 17.83 billion USD, and the executive amount reached 12.15 billion USD, with an increase rate of 42.6% and 23.45% respectively year-on-year. At the end of June 2016, the total number of China Railway Express travels reached 1,881 with 502 return trips, reaching a 170-million USD total amount of export and import trading. China's active promotion upon cooperation along B&R, has boosted the global concern for Belt and Road.

In the global range, the public's concern for Belt and Road covers a vast range. Apart from some countries in Africa, places in Asia, Oceania, South America, North America have shown continuous concern for B&R. Hong Kong of China, Macau of China, Singapore, Myanmar, Brunei, Mongolia, Australia are the regions that show the biggest concern for B&R across the globe. Therefore, China's BRI has earned an extremely high position in the international public's eyes and got widely recognized all over the world, which proves one thing – China has been playing an indispensable role in propelling multilateral regional cooperation as a great land. Also, as a great land, China has been holding high the banner of peaceful development with the existing historical icons of the Ancient Silk Road as the helper, whilst actively developing the economic cooperation partnership with countries along the route of B&R, mutually building a community of shared interests, common destiny and shared responsibilities with mutual political trust, economic interconnection as well as cultural tolerance.

There is a huge difference upon the concerns shown to the Ancient Silk Road and Belt and Road between domestic and foreign public. In China, the difference between the concerns shown to the Ancient Silk Road and Belt and Road is quite small, as both

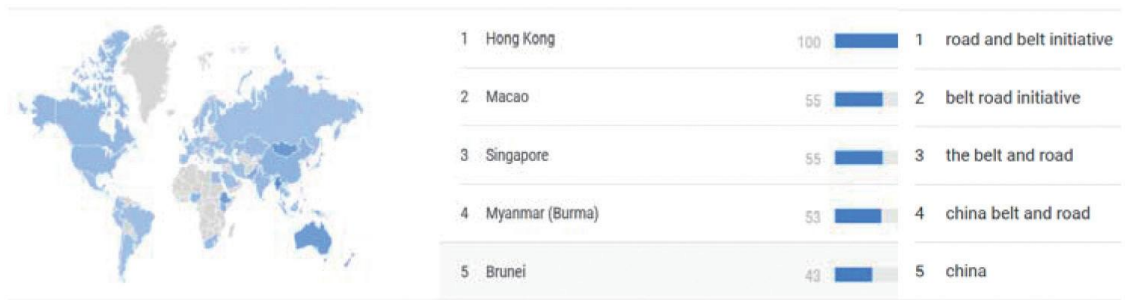


Chart 4-2 The international concern for Belt and Road

Source: Google Trend

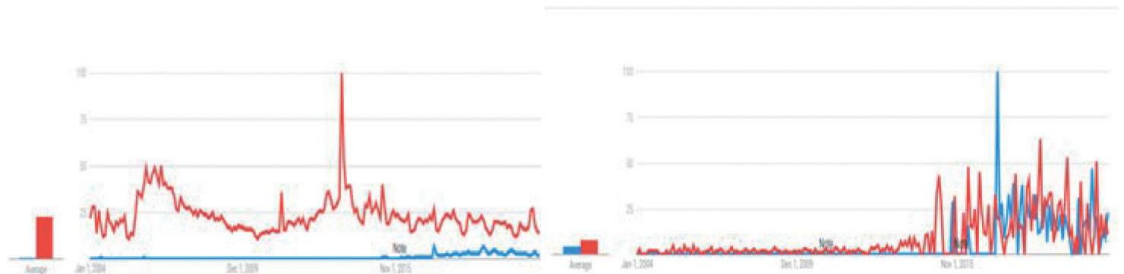


Chart 4-3 The concern for the Silk Road and Belt and Road shown by the global public and Chinese public

Source: Google Trend

of them have been growing rapidly after the year of 2015. That showcases one thing – Chinese public has a relatively high recognition and understanding towards the Belt and Road as well as the Silk Road, between which the difference is small. However, the international public shows obviously bigger interest to the Silk Road than to B&R, which sufficiently indicates that the global public holds enormous passion towards the ancient and historical Silk Road whilst the newly-emerged BRI should also be actively promoted and worked upon, so that more international attention can be drawn and more modern significance and modern value can be added to the Silk Road as well.

1.2. The concerns from the global public and Chinese public to tourism are gigantically different in the tendency

There is a huge difference in the tendency between the global public and Chinese public's concerns for tourism. Globally speaking, the public's concerns



Chart 4-4 The concern from global and Chinese public for tourism

Source: Google Trend

for tourism continuously declined with fluctuation starting from 2004, until it reached the lowest rate in history in 2021. This tendency has very much to do with the international economic situation at present, but also related to the worldwide COVID-19 epidemic. However, as the global public shows constant deterring passion towards tourism, Chinese public's enthusiasm towards tourism turns out to be completely different. Since the year of 2014, Chinese public's concerns for tourism have been on the rise before getting stabilized. That explains one point even more clearly – Chinese public has been playing a positively promoting role in the development of the global tourism industry, and the public's passion towards tourism has not even been affected by the COVID-19 epidemic. This is a major manifestation that shows the rise of China's economy, one that also indicates that China is going to play an even more lively role in the international tourism arena.

2. The Hot Topics of Tourism along Belt and Road

2.1 The media's concern has been conspicuously affected by the COVID-19 epidemic

Through the analyses conducted based upon statistics data on Google News and Bing News that are relevant to tourism along B&R, the following phenomena have been discovered. It has been noticed that the media's concern for tourism along B&R

was on the rise from 2011 and the growth was accelerated from 2015 whilst in 2020, an obvious cliff-fall appeared. That was much related to the COVID-19 epidemic. Influenced by the epidemic in 2020, the media's passion for tourism, especially the tourism along B&R has been significantly reduced. However, the epidemic is getting gradually regulated in the global range, especially in China, which has the world's largest population as well as a properly controlled circumstance of the epidemic. Plus, the vaccine has been launched and put into use, so the global media sees the dawn of the rebound from the epidemic, and the confidence and motivation of recovering and developing tourism along B&R are much more fortified.

2.2 China steps higher in the tourism development along B&R

In accordance with the tourism-relevant word clouds obtained through media statistics data, words of Belt and Road, Tourism, China, Initiative, Cooperation are among the top clicks. That sufficiently showcases the role China is playing in the active promotion of development and tourism cooperation along B&R, in the global media's opinions. It is also an important manifestation of China's role as a great power in the international arena, one that displays the established profile of the Chinese nation. In addition, words like Economic, Investment, Culture, International are also crucial keywords in the tourism industry along B&R, which exhibits that BRI is playing an efficacious part in aspects of economy,

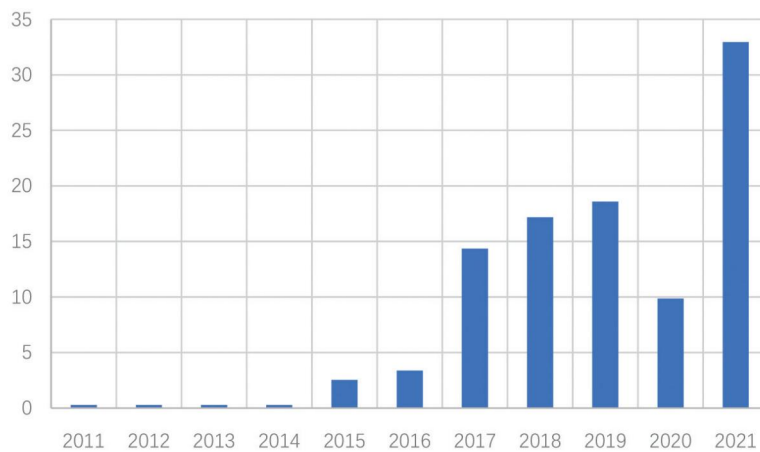


Chart 4-5 The proportion of global media's concerns for tourism of B&R

Source: Sorted in accordance with Google News and Bing News

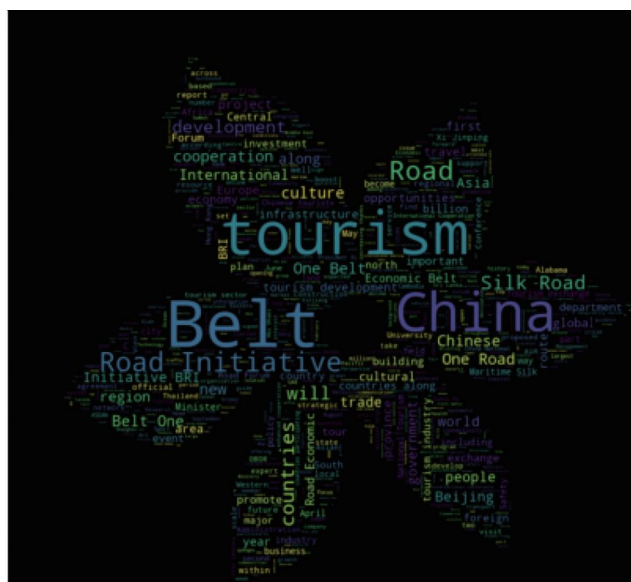


Chart 4-6 Word clouds of media's concern for the tourism along B&R

Source: Sorted in accordance with Google News and Bing News

development, culture as well as international cooperation.

2.3 Regional cooperation and development have gradually become the focus in tourism along B&R

Between 2011 and 2021, the media's concern for the tourism along B&R gradually shifted from pure tourism development to the aspects of regional development, economic cooperation, and cultural integration development. Due to the impact of COVID-19 epidemic, security and health, governmental intervention has become what tourism development and cooperation along B&R regions are more concerned for. Before the year of 2014, B&R was mostly presented to the public in the form of the Silk Road, but starting from 2014, the concept of Belt and Road started to emerge and solidified little by little. Before the year of 2014, the tourism along B&R was more concerned with the aspect of enjoyment, scenery, excellent, plenty, which dealt more with the travel resource itself or the travelling experience. Yet starting from 2014 when the Belt and Road Initiative was praised, regional cooperation of economy and culture, such as fund, initiative, cooperation, economy, development, has drawn enormous attention. The tourism development along Belt and Road is no longer about industry development only, but serves as an important carrier that propels regional development and district cooperation. What should be noticed is that China, Beijing, Xi Jinping are words that have

Year	2011	2012	2013	2014	2015	2016
Hot Words	Silk Road	Northern	Silk Road	Belt and Road	Tourism	Belt and Road
	Enjoyment	Willow	Tourism	Paving	Belt and Road	Tourism
	Tourism Scenery	Excellent Country Tube	Plenty Keats	Tourism Hawaiian History Authors Dawn Way	Countries China Europe Initiative Silk Road Service Opportunitie	Fund Malaysia China
Year	2017		2018	2019	2020	2021
Hot Words	Belt and Road		Belt and Road	Belt and Road	Belt and Road	Belt and Road
	Tourism		Tourism	Tourism	Tourism	Tourism
	China		Initiative	China	China	China
	Development		China	Initiative	Culture	Initiative
	Countries		Cooperation	Cooperation	COVID	Silk Road
	Cooperation		Development	Economic	People	Government
	Beijing			Beijing	Economic	Safety
				Culture	Initiative	Asia
				Xi Jinping	Contries	Development
					National	Forum

Table 4-1 The Alternation of Trendy Words that Media Show Concern for Since 2011
Source: Sorted in accordance with Google News and Bing News

received vast attention among the media, which again reflects that China has been playing a positive and significant role in the Belt and Road Initiative.

2.4 The COVID-19 epidemic has made media show more concerns for recovery, health and region restriction

The COVID-19 epidemic has cut down media's concern for the tourism along B&R numerous times. A special analysis has been conducted upon the impacts COVID-19 epidemic has cast upon tourism. In the context of COVID-19 epidemic, medias has been paying more attention to topics like pandemic, influence, border and death, which manifests that the public has been exceptionally concerned about the distribution of the epidemic as well as its impact upon tourism development and cooperation along Belt and Road.

In the context of COVID-19 epidemic, the media has been paying extremely much attention to B&R, tourism and pandemic. Among them, a tight connection has been established between health, restriction, epidemic and recovery whilst culture and sightseeing, which used to earn much attention from the media, are now getting relatively disconnected with phrases like tourism and the Belt and Road Initiative. Instead, the media has built a tight



Chart 4-7 The hot topics media pays attention to in terms of COVID-19 epidemic

Source: Sorted in accordance with Google News and Bing News

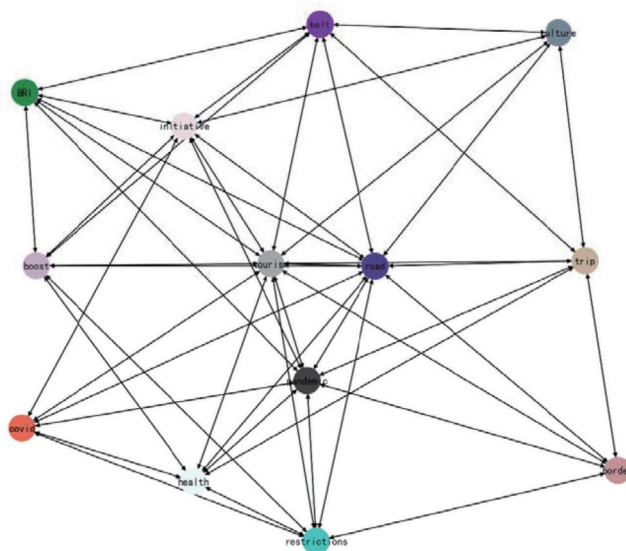


Chart 4-8 The connections between the media's concerns

Source: Sorted in accordance with Google News and Bing News

connection between the tourism recovery and the development along B&R with topics like epidemic, health and security, and the media has correspondingly shifted their focus too.

3. The Academic Circle's Concerns for Tourism along Belt and Road

The academic circle's concerns for the tourism along B&R have been a very important presenting window for the cooperation and development along B&R. To clarify the leading development direction of tourism along B&R, understanding and analyzing the academic circle's interest and the concerns for the tourism along B&R is of great referential significance and learning value.

There are more than 7,500 articles of documents relevant to tourism along B&R available in the Chinese academic circle. Ever since the year of 2014, the number of published documents with a subject relevant to tourism along B&R has firstly been on the rise and then stabilized. In recent years, the quantity of published essays relevant to tourism along B&R is around 1,500 each year, which has sufficiently displayed that Chinese academic circle has been showing great concerns for tourism along B&R.

3.1 Subjects on spotlight are mainly concentrated upon the aspect of strategy, initiative and construction

Chinese academic circle mainly pays attention to the following aspects in terms of tourism along B&R, namely the B&R strategy, the construction along

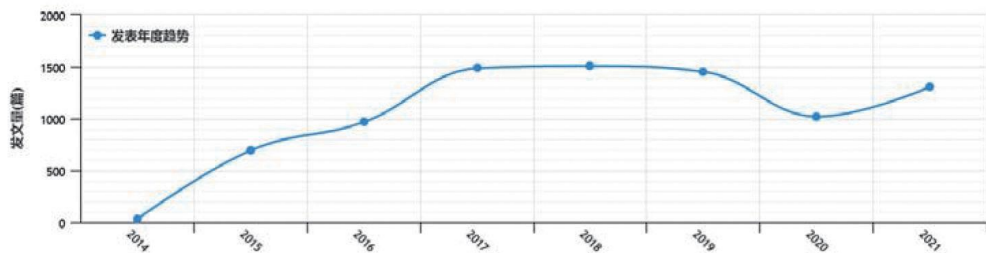


Chart 4-9 The quantity of published articles with a subject relevant to B&R

Source: CNKI (www.cnki.net)

B&R, tourism cooperation, the Silk Road Economic Belt, sports tourism and inbound tourism, etc. The academic circle has put emphasis upon the development of B&R strategy as well as its influence upon tourism industry and inbound tourism, whilst stressing the strategic researches and studies of development route, aiming at actively providing experiential references as well as development guidance for the tourism development along B&R.

3.2 The reforming of economic system, tourism and culture are the main fields involved

The tourism along B&R is involved with vast and various fields, with frisky discussions carried out in the following ones - the reforming of the economic system,

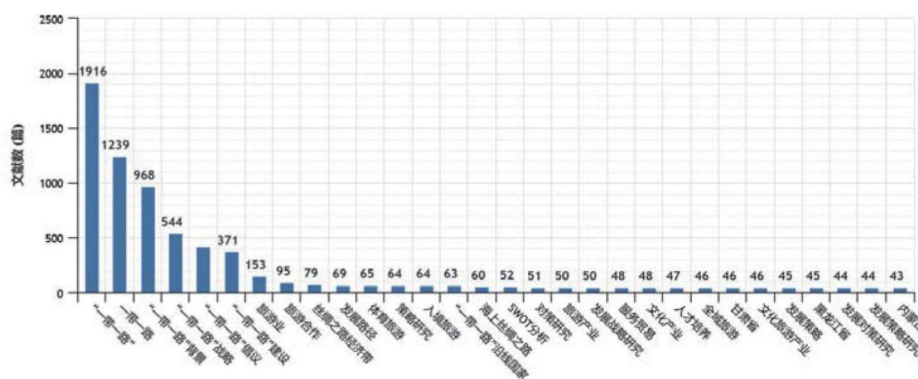


Chart 4-10 The main subjects concerning tourism along the Belt and Road

Source: CNKI (www.cnki.net)

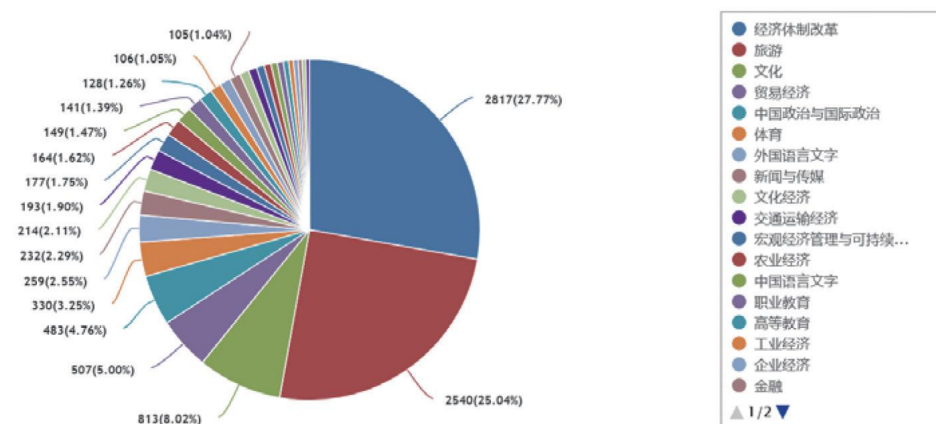


Chart 4-11 Fields involved with the tourism along B&R

Source: CNKI (www.cnki.net)

tourism, culture, economic trade, Chinese politics and international politics, sports, literature of foreign languages, news and media, cultural economy, transportation economy, macroscopic economic management, agricultural economy, vocational education, etc. Among what are mentioned above, the reforming of the economic system, tourism and culture have accounted for as high as 27.77%, 25.04%, 8.02% respectively.

3.3 The internal connection is both complicated and compact

The key concerning issues in the tourism along B&R as well as their network relation. Issues such as cultural tourism, talent cultivation, regional tourism and international relations have been what the tourism along B&R is mainly concerned about. And there is a very complicated internal connection between these issues, which indicates that the tourism along Belt and Road is, as a matter of fact, an enormous system, one that is able to solve regional and international issues such as talent cultivation, tourism development and regional development. The dense connection among these issues sufficiently proves one thing – that the Belt and Road Initiative is a notable measure in building a community with a shared future for mankind.

4. Suggestions Based upon the Public Opinions for the Tourism Development along Belt and Road

4.1 To intensify the international concern for Belt and Road with the assistance of the Silk Road

Since the global public has more concerns for the Silk Road than for Belt and Road, the interconnected relationship between the Silk Road and B&R should be fortified with the assistance of the Silk Road. In this way, the international exposure and public recognition of Belt and Road can be stimulated through the Silk Road, and international concern for Belt and Road can be elevated.

4.2 To focus upon targeted marketing of tourism along Belt and Road

People with different ages, genders and professions are attracted by the tourism along B&R for various reasons. Targeted tourism marketing, when

conducted in different groups, can be a very crucial method to enhance the public's interest in tourism along B&R. A series of modern information and technology, such as VR and AI should be sufficiently utilized, so that they can be profoundly integrated with the tourism development along B&R and so that they can draw the attention and interest from people in younger generations as well as the women. In this way, the marketing efficiency as well as the accuracy of tourism along B&R can be largely enhanced as a whole.

4.3 To further strengthen cross-region cooperation

According to the analyses of public opinions on the tourism along B&R, the exposure and concerns among countries in Central Asia are relatively low. Therefore, the cooperation between district and region should be further reinforced to stimulate the countries along the route of B&R, so that they can take active part in the tourism cooperation along B&R and mutually contribute to the tourism along B&R, for a high-quality accomplishment of regional cooperation and development.

4.4 To encourage cross-field cooperation

Tourism along Belt and Road covers a variety of fields, including economy, culture, tourism, sports, agriculture and education. All of them are in close cooperation and connection with one another. Therefore, encouraging cross-field tourism cooperation along B&R is of great significance and value for a comprehensive, efficient and high-quality tourism development along B&R.

