



2020

世界旅游发展报告 市场复苏的信心与产业变革的挑战

THE REPORT ON WORLD TOURISM DEVELOPMENT 2020
CONFIDENCE IN MARKET RECOVERY & CHALLENGES
OF INDUSTRY TRANSFORMATION





WORLD TOURISM ALLIANCE



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一、已经发生的： 空前的疫情影响，有效地行业应对

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旅游一直与危机相伴，但旅游从未倒下。2020 突如其来的新冠疫情，导致国际旅游业断崖式下降，但疫情影响是暂时的，一系列国际合作、政府行动和行业自救等应对都是卓有成效的。疫后旅游市场振兴不是要简单地回到过去，而是要积极地谋划未来。要加快构建国内、国际相互促进的旅游业发展新格局，善用科学技术、文化创意、艺术时尚来引领旅游业的高质量发展，为全球旅游业繁荣振兴提供思想引领和政策支撑。要进一步提升游客、企业员工和社区居民的满意度和获得感，更加关注包括但不限于环境变化、妇女和儿童保护、弱势群体权益、动物福利等重要议题，在应对危机和挑战中，把旅游业导向一个更繁荣和可持续发展的未来。

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1. 失去的市场

新冠疫情导致国际旅游业断崖式下降。2020 年新冠疫情因其传染性高、传播速度快等特点，各国政府迅速采取了全国戒严、出行管制、关闭海关、航班停运、景点关门等管制措施，酒店、航班和 OTA 平台遭遇了大量退订，许多大型旅游企业由于资金短缺导致就业和投资受到大幅影响、甚至宣告破产，全球旅游人数和收入呈断崖式下降。全球旅游业受影响最严重的是第二季度，国际游客的人数在 4 月降到最低，从 5 月开始缓慢恢复（图 1– 图 3）。4 月，全球 96% 的旅游目的地实行了出行限制措施，其中 90% 完全或有针对性的关闭边境。截止 7 月 30 日，全球仍有 53% 的国家完全或有针对性的关闭边境。受世界经济增长放缓影响，此次新冠疫情较“非典”波及范围更广，持续时间更长，UNWTO 已经调低了 2020 年旅游业增速预期，全球旅游负增长幅度大概率超过 2003 年。



图 1 全球旅游业受 COVID-19 疫情影响的总体情况（数据来源：UNWTO）

表 1 世界主要国家新冠肺炎疫情发展阶段

| 国别 | 累计确诊病例数 | 最新 24 小时内新增病例数 | 累计死亡人数 | 疫情发展阶段 |
|------|---------|----------------|--------|--------|
| 美国 | 7471688 | 52458 | 210338 | 控制阶段 |
| 中国 | 91252 | 40 | 4746 | 控制阶段 |
| 德国 | 314660 | 4516 | 9589 | 控制阶段 |
| 英国 | 561819 | 17540 | 42592 | 反弹阶段 |
| 印度 | 6906151 | 70496 | 106490 | 控制阶段 |
| 日本 | 87639 | 619 | 1616 | 控制阶段 |
| 意大利 | 338398 | 4458 | 36083 | 控制阶段 |
| 法国 | 644573 | 18071 | 32287 | 反弹阶段 |
| 墨西哥 | 774020 | 4462 | 80083 | 控制阶段 |
| 澳大利亚 | 27206 | 24 | 897 | 控制阶段 |
| 西班牙 | 848324 | 12423 | 32688 | 控制阶段 |
| 韩国 | 24476 | 54 | 428 | 控制阶段 |

注：数据来源 WHO；截止时间 2020.10.10。

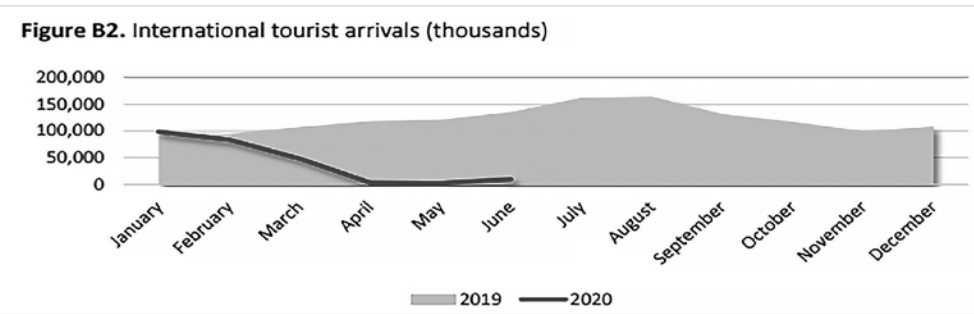


图 2 2020 年和 2019 年国际游客人数的对比（数据来源：世界银行）

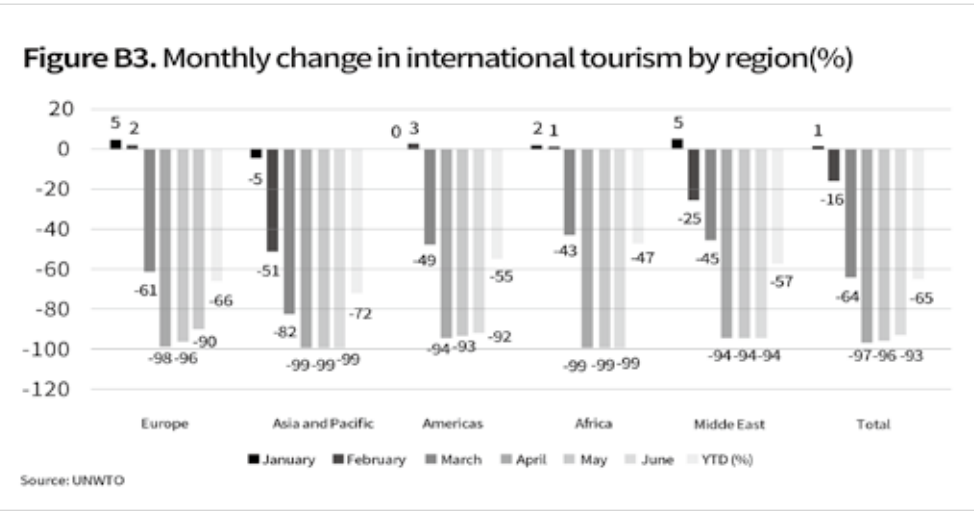


图 3 全球各地区国际旅游业与上年同比的变化（数据来源：世界银行）

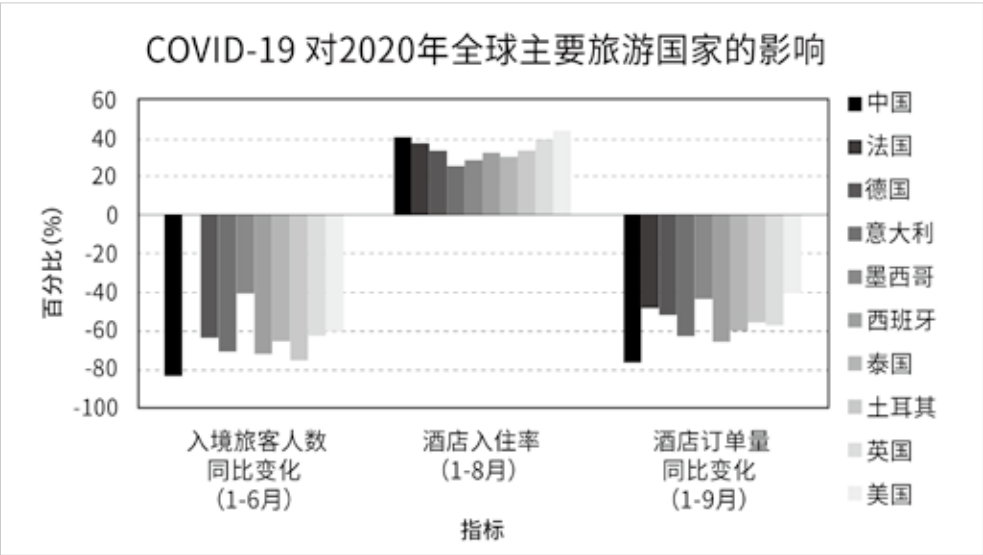


图 4 2020 年新冠疫情对全球主要旅游国家的影响（数据来源：UNWTO）

世界各国疫情发展阶段分化，国际旅游市场复苏节奏受制于防控短板。通过对比世界卫生组织公布的全球旅游大国疫情数据可以发现，疫情发展过程大致可以分为三种类型（表 1），以中国为代表的早防严防国家，疫情峰值出现在 4 月以前，还包括泰国、德国和意大利；以印度为代表的防控相对较晚的国家，疫情出现在 7 月之后，还包括墨西哥、菲律宾和美国；以法国为代表的过早放宽出行政策导致疫情反弹的国家，疫情的峰值有两个，还包括英国、澳大利亚、奥地利和日本。UNWTO 数据显示，2020 年上半年全球入境游客减少 50%，其中受影响最严重的是亚太地区，减少了 72%，其次分别是欧洲、中东、美洲、非洲，1–8 月全球酒店入住率为 40%，其中非洲最低，为 28%，1–9 月酒店订单全球同比减少 46%（图 4）。截止 6 月份，法国、英国、德国等欧洲国家，日本、韩国、印度等亚洲国家，新西兰、澳大利亚等大洋洲国家以谨慎的态度尝试分阶段解除入境管制。当前，新冠疫情已然国际化，国际旅游市场的全面复苏取决于疫情防控的最短板。

中国出境旅游市场收缩，显著影响国际旅游经济景气。受疫情影响，中国出境旅游市场急速萎缩。由于亚太地区多个国家旅游市场有显著的中国化倾向，其当地的航空公司、旅行社、住宿业、餐饮业、租车服务等行业的收入严重依赖中国游客的消费支出。新冠疫情暴发后，中

国游客锐减，当地旅游业生存艰难，多家旅行社、酒店、餐馆陷入经营困境。主要目的地中国澳门地区、泰国、日本、韩国等地旅游业遭受重创。数据显示，2020 年新冠肺炎疫情暴发后，中国澳门地区入境旅客由 1 月份的 285 万人次锐减至 3 月份的 21 万人次，跌幅超过九成以上。泰国旅游局（TAT）公布的预测数据，受新冠肺炎疫情影响，今年赴泰国旅游的中国游客可能会减少 60%。日本 NHK 电视台 4 月 16 日报道，日本旅游业因疫情受到沉重打击，中国游客的消费额同比减少了 44%，为 2348 亿日元（约合人民币 154 亿元）。济州旅游协会消息称，2 月 1 日至 3 月 1 日访问韩国济州岛中国游客仅为 4355 人次，同比减少 94%。

2. 稳步的复苏

主要国家国内旅游不同程度走向复工复产复业新阶段。新冠疫情对全球各个国家旅游业的影响存在程度上的差异，各个国家的疫情应对和旅游业的影响也存在差异，但自 6 月以来，都不同程度走向了稳步复工复产（图 5）。中国旅游经济依托国内超级大市场，已经进入疫情防控常态情境下全面复工复产复业新阶段，仅国庆节、中秋节八天，中国共接待国内游客 6.37 亿人次，按可比口径同比恢复 79.0%，实现国内旅游收入 4665.6 亿元，按可比口径同比恢复 69.9%，与端午节假期相比，恢复进度分别提高了 28 个和 39 个百分点，中国旅游经济稳中向好的基本面进一步稳固。奥地利旅游小镇哈尔施塔特 6 月中旬以来很多酒店重新开业，预订量不断增加，迎来了酒店和停车场游客爆满的场景，除了本土游客，来自德国、匈牙利等周边国家的游客比例也越来越大。法国一些地区夏季游客总人数较去年有所增加，有的地方甚至达到 10% 以上的增长率。马来西亚 6 月份客房总体预订量与 2019 年相比增长了接近 190%。

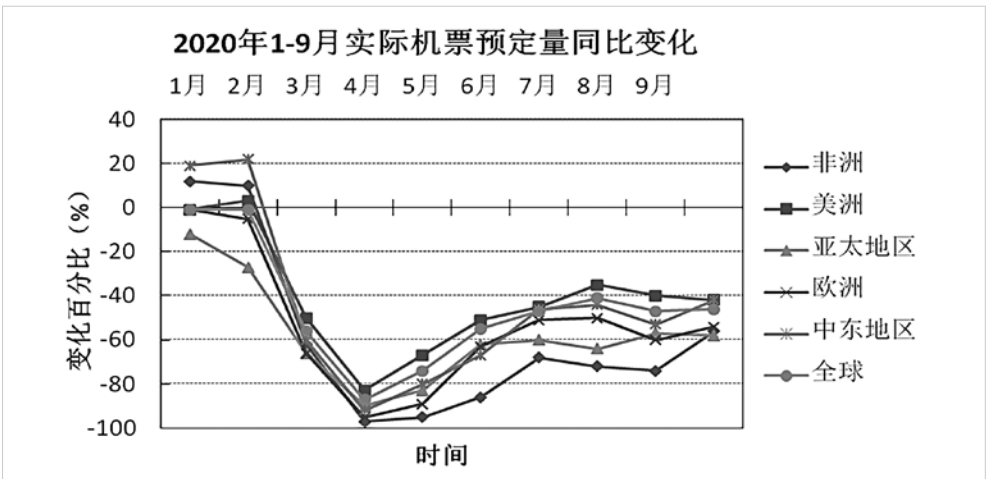
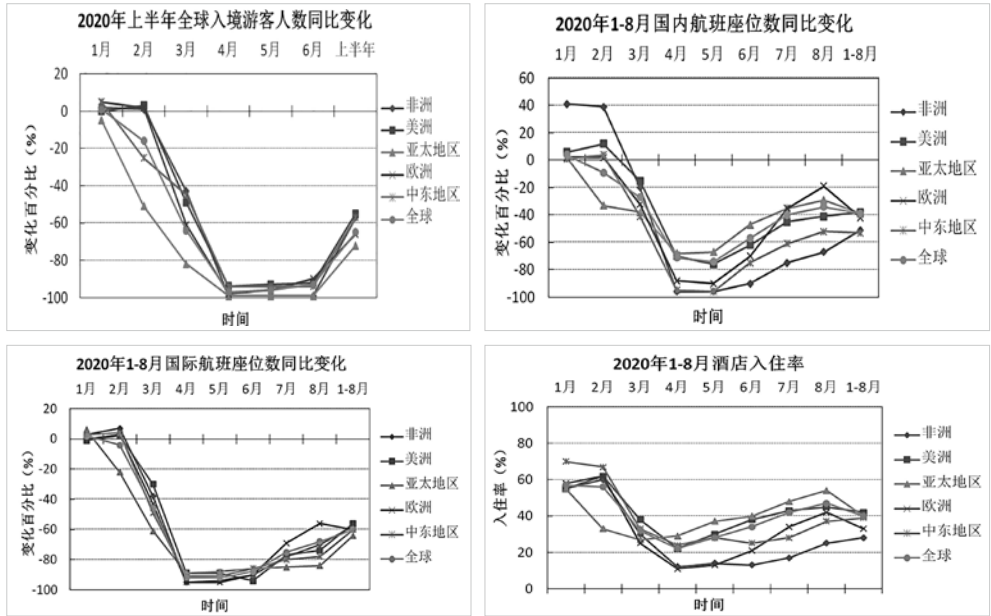


图 5 新冠疫情对全球各地区旅游业的影响（组图）（数据来源：UNWTO）

3. 自救的行业

旅游业从一开始就处于抗疫的第一线。在有效阻断疫情经由旅游活动而传播和扩散的同时，也让旅行社、OTA、住宿、景区、购物等旅游企业承受了巨大的损失，承担了前所未有的财务和就业压力。中国旅游集团、凯撒、华程、众信、广之旅、春秋等传统旅行社，以携程、美团、飞猪、同程、途牛为代表的在线旅行运营商，在自身业务停摆且损失巨大的情况下，第一时间响应国家号召，快速推出“无损退订”服务。企业客服人员连续加班服务退订需求，免费退订人群范围从疫情确诊人群、同行游客扩展至各类人员，订单范围覆盖至全网全品类订单，退订方式由人工扩展到在线自助退订。正是由于旅游企业的主动承压，广大游客加深了对政府应急决策的认同和旅游服务品质的认可。首旅如家、锦江、铂涛、途家、斯维登、华住、爱彼迎、东呈等酒店集团及分享住宿平台，分别向游客提供了免费取消预订保障，并为武汉医务人员提供免费住宿。美团酒店携手华住、如家、铂涛等多家酒店集团上线“返工安心住”专题，为复工返程人群提供防疫安心住所。春秋航空等所有执飞航线上，免费承运救援物资。多地海外中国领队和导游加入募资行列，从国外运送口罩、护目镜等紧缺物资。在协助游客变更行程中能够恪守“游客至上，服务至诚”的行业价值观，通过网络传递行业正能量。

企业积极开展互助自救，自我修复和研发创新动能正在集聚。在协会、商会的倡议和旅游集团的推动下，上下游企业和合作伙伴也在展开行业互助行动。中国锦江国际集团筹措了 35 亿元资金，支持旗下 7500 家酒店渡难关。其中，不超过 4.5% 利率的流动性支持贷款和物资采购贷款、减免加盟费和管理费，都是很实在的措施。中国旅游集团开通“线上巴士商城”和免税商品在线预订等新业务，三亚免税城 2020 年 1 月 27 日至 2 月 13 日在线累计实现销售同比增长 92%。中国岭南集团在保障游客无损退改外，还通过岭南酒店和广之旅易起行平台，

推出外带安心居家美味服务，让老百姓能够不出家门享受名厨定制美味。携程集团启动了 1 亿元重大灾害保障金，与供应商和合作伙伴分担无损退订的损失。同程等在线平台积极拓展电商零售业务，东方、春秋、吉祥、华夏、重庆、四川等航空公司抓住各地有序复工复产的交通需求，主动推出价格灵活的包机服务。文化和旅游行业积极扩充数字文化产品，满足民众在疫情期间的在线文娱需求。中国国家文物局网站“博物馆网上展览平台”临时扩增在线展览内容，并通过新媒体和 VR 等技术呈现；全国各地博物馆推出网上展览超 2000 余项。在中国音像与数字出版协会的倡议下，阅文集团、喜马拉雅等数十家数字阅读企业也为用户免费开放了旗下精选资源。今日头条等平台春节上线了《囧妈》等影片，从影院播放形式变更为网络免费播放，大大满足了民众在线文化需求。

4. 行动的政府

开展行之有效的政策研究、趋势研判、数据支撑和信息发布。中国政府及时组织专业机构开展专题研究和专业测算，及时开展专业统计、测算和评估工作，通过科学评估疫情影响避免出现全行业的蔓延性恐慌。以春节七天假期为例，有组织的团队和探亲访友之外的旅游活动大幅度减少直至全面停止，但是节前到达目的地的团队旅游者、自助旅游者和探亲访友的游客，其餐饮、住宿、购物、通讯等基本消费还是存在的。法国旅游局委员会定期召开会议为行业提供支持。奥地利农业、区域和旅游部与旅游行业及相关人员紧密讨论当前形势和应对措施。新加坡专门组建了一只旅游恢复队伍，联合了各部门以及行业中旅行社、导游、航空公司、酒店等的代表。韩国定期召开旅游部门、企业的视频会议对行业现有危机形势进行评估并讨论缓解危机的措施。泰国建立了一个大数据存储系统发展项目。德国专门开办了一个疫情导航网站，为旅游从业人员提供最新的新闻和建议。希腊旅游部让危机管理委员会迅速对危机做出响应，要求它降低疫情对旅游业的潜在破坏力并保护游客、恢复游客的信心。UNWTO 针对如何应对疫情导致的旅游业发展危机问题专门成立了全球旅游危机委员会（GTCC）。

出台系列财政和货币等减免和激励政策。疫情发生后，中国政府通过降低用工成本、税收减免、租金减免、融资支持、能源费用减免等扶持政策帮助住宿企业渡过难关，专门针对旅行社退还服务质量保证金以缓解他们的现金流压力。挪威针对客运、住宿、文化活动、景区的增值税从 12% 减到 8%，该项措施将持续到 10 月 31 日。德国也针对旅游休闲行业出台了增值税减免措施。土耳其国内航班的增值税三个月以内从 18% 直接降到 1%。伊朗、马来西亚、新加坡和韩国允许航空公司、酒店以及餐饮企业延期交税。埃及允许旅游和酒店企业延期交税，位于古迹周边的所有市场和餐厅在旅游业复苏之前可免租，埃及中央银行针对发放雇员工资的企业提供低利率贷款。哥伦比亚所有机票的增值税率降低到 5% 以下，商务、产业和旅游部提高了旅游企业的信用额度以缓解企业现金流不足的问题。澳大利亚针对航空业免除了若干项与

飞行和乘客有关的费用。斐济公布了一项新的酒店投资激励方案。意大利和新西兰为国有航空公司提供了资金支持。俄罗斯的旅游企业和航空企业也可以延期缴税。新加坡降低了机场收费。非洲针对旅游业的中小企业提供了额外的资金。奥地利所有旅游企业在新冠疫情发生前的贷款可以在 2020 年申请暂停还款。

面向可持续就业开展专业培训和政策扶持。在中国，线上 OTA 运营平台对线下门店启动关怀保障计划，通过减免门店管理费、延长签约任务额度、开展培训提升计划，对线下合作门店进行帮助扶持，减轻门店负担，保存门店实力。部分景区利用暂停营业期间，制定内部提升计划，组织员工线上培训、交流和学习，加强员工专业知识和专业技能培养，提升危机处理和应急管理能力。在保加利亚，政府在保险费用方面资助了酒店、餐饮、旅行社和承包商的雇员。希腊在疫情期间劳动合同到期的工人可以得到补助，同时社会保险和医疗费用也由政府负责。意大利允许旅游和文化产业可以延期缴纳预扣税以及社会安全和福利费。日本增加了就业补贴以保护就业率。柬埔寨针对失业工人提供了再就业的培训并承担酒店、招待所、餐厅和旅行社的雇员最低工资水平 20% 的工资。西班牙减少了临时性集体裁员事件的发生并支持公司延长工人的合同期限。瑞典通过补贴雇主的工资以达到减少短期裁员。以色列旅游部开办了网上课程和专业研讨会以增强人民的就业资本，尤其针对酒店、旅行社、导游和其他旅游专业人才。埃及酒店协会按照 WHO 的疫情防控指南对酒店员工进行培训，从而更好地在疫情期间做好防控。

适时发布旅游业重启以及国内旅游恢复一揽子计划。从 5 月中旬开始，一些国家已经开始宣布重启旅游业，通过放宽出行限制来促进国内旅游业的恢复，截至 9 月，全球超过 50% 的目的地开始放宽旅行限制，其中，发达经济体和新兴经济体比例分别达 79%、47%。中国实施的是分阶段放宽政策，先是允许省内游，等疫情得到很好控制才放开跨省游，景点的流量限制也是逐渐提高，从最开始的 30% 到十一假期的 75%。欧洲、亚洲和太平洋岛国开始实施旅游业重启举措，新西兰和澳大利亚开启了旅游泡泡计划，双方允许游客的往来。西班牙国家旅游局联合西班牙游客服务研究所建立了一个安全旅游认证系统，通过医疗部门认证的系统，医疗部通过这个系统发布一系列防疫指南，从而减少在酒店、高尔夫课程、露营、旅行社等旅游业各个领域的疫情传播。在市场方面，意大利、冰岛和韩国政府发放了国内旅游代金券。新加坡资助了一个市场合作项目，以加速旅游行业的数字化转型，主要是给旅游从业人员提供线上培训。埃及对景区门票进行减免，对入境的签证费也进行了减免。

持续完善旅游领域的治理体系和治理能力。为了应对新冠疫情对经济突然的打击，全球大多数国家采取了经济宽松刺激政策（包括财政和货币措施），以及就业支持等一揽子措施，这些措施包括减免或延期交增值税和个人所得税以及紧急资金援助等。在 UNWTO 所调查的 220 个国家和地区中，有 167 个国家被报道针对疫情影响采取了专门的措施来应对危机，其中 144

个国家采取了财政和货币政策，100个国家有专门针对就业扶持和培训的政策，亚洲、非洲和欧洲国家的积极应对措施较多，美洲和中东国家的措施相对较少。世界卫生组织（WHO）在SARS事件后提出的PHEIC警报机制，在过去十五年间，算上此次新冠肺炎疫情，已启动了六次，以中国为代表的国家，通过在疫情中持续完善旅游领域的治理体系和治理能力，已经取得了常态化疫情防控的重要胜利。中国在中央的统一领导下，科学评估疫情对市场和产业两个方面的影响，充分借鉴国际国内的历史经验，根据疫情暴发期、疫情中后期和后疫情的发展阶段，科学研判、冷静应对，中国中央政府和发改、工信、商务、财政、金融等部门已经陆续出台多项政策，还将继续出台一系列稳就业、稳市场、稳预期的政策，各级地方政府也从税收减免、奖励补贴、债务展期、扩大投资、复工复产等方面进行政策支持，同时还科学研判游客返程增加、国民休闲需求增长、企业财务和员工就业压力日增的形势，在出台救企托底政策、引导行业互助自救方面进行了相机精准调控并取得了突破性的成就。

二、正在经历的： 走出至暗时刻，走向未来的光明

1. 旅游消费信心正在恢复

随着疫苗研发推进、公共卫生措施的正确应用，疫情在得到缓解的同时，旅游消费信心也在逐渐恢复。截止到2020年9月份，已有53%的旅游目的地国家谨慎的放松了旅游限制，以缓解由于旅行禁令所带来巨大经济损失与失业率。中国旅游研究院（文化和旅游部数据中心）数据显示，中国仅国庆节、中秋节八天，游客平均出游半径213.0公里，在目的地的平均游憩半径为14.2公里，出游半径较劳动节和端午假期增长56%以上；35.8%的游客选择“国内疫情形势好转，国内中长线旅游变为省内游或近程游”，跨省游的比例为29.1%，出行距离300公里以内的占比83.5%，不少人在假期中段返程后二次短途出游和多次本地休闲；85.0%的游客参与了各类文化休闲活动，其中参观历史文化街区、博物馆、美术馆的游客比例分别为41.8%、40.5%和27.1%。10月1日至8日，访中国澳门地区游客共计15.63万人次，其中内地游客占比超过93%，有效带动了澳门旅游市场重现生机。Tripadvisor 2020年9月最新的数据显示，有20个国家国内酒店的周订单量超过了2019年（图6）。



图6 Tripadvisor 网站国内酒店周订单量同比增长的20个国家

2. 产业创新动能正在积聚

旅游业仍是最具投资价值的优选领域。2020 年中国服贸会特别设立旅游投融资大会上，签约总额达到 157.1 亿元人民币。美国探险邮轮 Lindblad 公司已通过优先可转股的形式，获得了 8500 万美元的融资。欧洲风投机构 Howzat Partners 最近计划融资 1.2 亿美元（1 亿欧元）用于投资更多旅游和数字化创业公司。目的地旅游电商 KKday 完成 7500 万美元 C 轮融资，其中，领投方 Cool Japan Fund(CJF) 主要由日本政府出资，致力于促进日本产品和服务的需求及发展。旅游和金融科技初创公司 Fly Now Pay Later 获得了 3920 万欧元 A 轮股权和债务融资。全球跨境支付平台 Airwallex（空中云汇）完成 D+ 轮融资，引入阿里巴巴创业者基金作为新投资方。英特尔斥资 9 亿美元收购以色列交通出行应用 Moovit，该应用将行程规划和公交线路、出行提示等功能结合为一体，目前已将其自动驾驶技术部署在接近 6000 万辆汽车上。

科技发展丰富和创新旅游体验方式。亚马逊上线了虚拟旅游体验服务 Amazon Explore，采取直播的形式让用户通过视频互动学习和探索新鲜的地方，部分项目也支持直接购物功能，体验项目包括墨西哥城游走观光、布拉格老城区漫步、个性化商店导购、日本寿司制作教程等。Klook 正与泰国旅游局合作开展“泰国安全与健康标识认证（SHA）”项目，为旅游业的重启做好准备，并提升游客疫后赴泰国旅游的安全感。德国国家旅游局与百度知道率先启动了复苏计划，百度知道推出“知行计划”，以“云游德国全知道”为主题，数字化推广为手段，展开一系列合作，携手打造多元问答互动生态。谷歌正与连锁酒店合作，将 Nest Hub 智能显示屏和谷歌助手引入酒店客房。

特色文化催化旅游业态创新。随着各国对本国特色文化的深入挖掘，文化和旅游呈现出良好的融合态势，催生诸多旅游产业形态。2019 年，巴黎英雄联盟 S9 全球总决赛，电子竞技现场观战的观众约有 5 万人，人气与世界足球杯赛场的人气相当。2019 年，德国国家旅游局与包豪斯大学联合会，推出度主题“百年包豪斯”，通过虚拟技术打造出魏玛包豪斯学院里的房间，让互联网访客身临其境，从文化旅游角度向经典致敬。澳大利亚为了让外来游客深度体验本地独特历史文化，推出“城市徒步游”，如“弗里曼特尔 2 小时徒步游”可以让游客参观澳大利亚殖民时期的监狱和当地著名的弗里曼特尔集市。

市场主体积极探索转型升级。随着疫情防控逐渐常态化，许多旅游从业者开始想方设法“突围”，探索行业转型升级的路径。在中国旅游社交分享网站“马蜂窝”上，最近，“欧来欧去”华人旅行团的号在直播频道活跃起来，每一期直播都选择欧洲某一处旅游胜地通过“云旅游”欣赏异国美景，了解当地文化风俗，如“跟着达芬奇密码解读巴黎”“徒步布达佩斯第一大道小香街”“英国的小罗马——温泉圣地巴斯”等。瑞士酒店纷纷推出特价房，酒店的房价甚至比疫情之前便宜了 70% 左右。欧洲各国的居民也开始自救，很多商家开始“户外大排档”模式的就餐方式。日本航空公司计划利用国际航线的客机，推出从成田机场起降的游览飞行服务，

乘坐飞机观赏夕阳余晖、眺望璀璨星空，并可以品尝夏威夷航线的机内套餐。法国当地旅游公司相继开设多节茶文化、非遗文化等直播课程，吸引喜爱传统文化的“看客”，并与法国旅游业协会共同举办“360 文化空间”的导游培训线上课程。

3. 政策支持的效应正在显现

城市与旅游融合发展的模式正在凸显。为了优化游客的旅行体验，提升游客在本国出游得到的满足感，各国在旅游业相关服务与设施上做出长期规划。北京城市总体规划显示，北京市将成为生活更方便、更舒心、更美好的和谐宜居城市，成为天蓝、水清、森林环绕的生态城市，也将成为彰显文化自信的国际交往中心城市。大伦敦发展的最新目标，2036 年伦敦将会成为“超越全球城市的存在—增加市民和企业的发展机会，优美的环境以及舒适的生活，成为应对 21 世纪各种问题，尤其是气候变化的世界先行城市”。2019 年 6 月 6 日，德国联邦内阁通过了德国环保部部长舒尔策提出的《城市自然系统整体规划》，其目标是保护城市中的物种和生物多样性，削弱气候变化的负面影响并最终提高人类的生活质量。联邦政府将支持市政当局将自然和绿色空间融入城市景观。联邦政府希望在城市公园、体育设施、公墓、私人庭院、城市森林、小溪和河流，以及城市中心周围的建筑和建筑上，建设更多的自然景观。

道路交通等基础设施的支撑条件正在稳固。世界上主要旅游国家立足于本国旅游业的高质量发展，大力推进本国道路交通设施优化升级，以便游客出行。中国中长期铁路网规划计划到 2025 年，铁路网规模达到 17.5 万公里左右，其中高速铁路 3.8 万公里左右，到 2030 年，基本实现内外互联互通、区际多路畅通、省会高铁连通、地市快速通达、县域基本覆盖。德国交通发展规划文件（2030）计划用 2696 亿欧元建设一个可持续发展的交通网络，支持交通基础设施建设领域的 1000 个紧急优先项目。部分旅游国家立足于本国现实，优先发展海运与航空运输。英国发布“海事战略 2050”，将在 15–30 年内实现无人航行系统、AI、机器人以及传感器等技术在航运业的运用，并在国际无人船监管框架的制定方面发挥主导作用。法国政府承诺未来五年内每年投资 15 亿欧元资助航空业研发。

教育体系正为旅游业输入不可或缺的专业队伍。截止到 2020 年，中国约有 1032 所大学、职业技术学院开设旅游类专业，旅游类专业包括：旅游管理、酒店管理、涉外旅游、历史文化旅游等 10 个专业。其教育目标既包括高级管理人才，也包括职业技术人才。日本国家旅游局（JNTO）为旅行社推出了一个全新电子学习平台，提供一套完整的在线培训和参与工具，确保学习者以“愉快、参与和更有效的方式”来获取和保留知识。该培训课程允许用户探索和学习各种日本食物、生活方式、传统、风景、观光景点，并观看日本的未来城市。

资金、签证优化、旅行补助等政策成效正在释放。自疫情在全球范围内暴发以来，各国政府面对被重创的旅游业，多种举措共同实施对旅游业进行扶持。资金支持：2020 年 5 月，法

国政府为扶持遭受新冠疫情重创的旅游行业推出总额达 180 亿欧元的救助计划，包括规模为 13 亿欧元的直接公共投资、向旅游业提供政府担保贷款、以及延长“团结基金”计划等；意大利政府 5 月通过总额 550 亿欧元一揽子经济刺激计划中，40 亿欧元将用于旅游业，10 亿欧元将用于文化产业，其中包含大量的税收、租金和贷款减免措施用于帮助酒店、餐厅、旅行社、剧院和电影等行业复苏。放开旅游签证：2020 年 9 月，泰国政府以特殊观光签证的模式接待外籍游客，该签证期限为 90 天，可延签 2 次，每次 90 天，共计 270 天；新加坡于 10 月 19 日起正式恢复暂停近半年的旅行签证申请，在保障公众健康前提下，与澳大利亚、文莱、中国、日本、马来西亚、新西兰、韩国、越南等一些国家 / 地区实施了特别旅行安排。旅行补助与代金券：2020 年 9 月，日本东京都政府宣布，与日本政府的“Go To Travel”逛逛支持项目联动，东京都居民在本地住宿观光，可以享受每晚 5000 日元的补助，当天往返的一日游也可获得 2500 日元的补助；罗马尼亚政府给员工发放价值约为 353 美元旅游休假代金券；澳大利亚推出了旅游代金券，允许游客只花一元钱就能在部分酒店入住一晚。

4. 国际合作新格局正在形成

旅游业是在新冠疫情中受打击最严重的行业，进而对其它行业产生连带效应，以欧洲为例，旅游业每一个岗位消失对应整个经济体中 2 到 3.5 的岗位消失，各国政府更意识到旅游业在整个经济体中的重要作用。自疫情发生以来，世界各国旅游业以及政府、业界和社会之间都在为旅游业的繁荣和振兴相向而行，全球旅游业从来没有像今天这样同仇敌忾，从来没有像今天这样团结一致。以中国服贸会世界旅游合作与发展大会专场、上合组织各成员国《2021–2022 年旅游合作联合行动计划》、二十国集团旅游部长会议等会议为代表，为共同应对疫情和发展旅游业提供有力支撑。世界旅游组织在 4 月发布了针对性行动指南，帮助全球旅游业以安全、无缝和负责任的方式重新开放。世界旅游业理事会与大型旅游企业，以及国际机场协会、国际邮轮协会和国际航空运输协会等签订了《安全旅行协议》，在二十国集团（G20）旅游部长会议期间，向旅游部长会议提交了重启国际旅行的具体计划。亚太旅游协会宣布启动危机资源中心和旅游业复苏晴雨表。世界旅游联盟发布 100 个旅游减贫案例为世界旅游扶贫提供智慧答案。世界旅游城市联合会联合 10 家国际组织和顶级旅游展会共同举办了世界旅游合作与发展大会，为全球城市旅游业复苏提供策略分析和趋势研判。

世界各国政府采取共同的、相向而行的措施来保住旅游业的底线和推动旅游业的发展，通过紧密的国际政府间的合作、企业间的合作，旅游业应对国际重大公共安全事件的能力得到了充分锻炼。政府在本次疫情防控中的重大作用远远超过以往国际公共危机事件，各地政府正在进行有效干预（减税、补贴、延期交税等）以使在这特殊时期可以存活并保障就业率，疫情严重时政府也会采取严格的出行限制措施以及要求一些企业关门等，一些航空公司和机场因此成

为国有控股。新冠疫情的发生增进了各地区甚至全球国家间的团结，以欧盟为例，2020 年 5 月 18 日，法国和德国联合发布欧洲各国联合抗击新冠疫情的倡议，并提出成立欧洲复苏基金用于合作和促进增长。除了在医疗方面的合作，还帮助滞留在欧洲以外的游客能顺利回家以及允许欧盟各国之间必要的人员流动。

纵观历史，旅游业一直与危机相伴，但从未倒下，每一次成功的应对都是经验的累积，每一次经验的积累都让旅游业变得更好。新冠疫情虽然暂时对旅游业的收入、游客人数等造成影响，但旅游业随着疫情的有效控制正在逐渐恢复。新冠疫情促使旅游业各个利益相关者在新形势下做出改变，并且这种改变是不可逆的。我们需要重塑心态，迎接新的转型和挑战。

三、将要来临的：市场的变化和产业的重构

1. 需求的增长和变化的市场

人们对美好旅行生活和文化休闲的向往程度在未来只会越来越高，旅游需求只是被暂时抑制了，但是从未消失。但我们需要注意到，旅游需求正在发生变化。基于对自身安全角度考虑，团体游在被散客游所替代，标准化的旅游产品在被个性化的定制旅游、自驾游所替代。中国旅游研究院（文化和旅游部数据中心）面向城乡居民的专项调研表明：多数受访者判断疫情“可能还会进一步扩大、但总体可控”，小部分受访者担心“尚未完全控制、形势比较紧张”。针对“疫情结束后对旅游的态度和看法”，71.5%受访者表示疫情结束后稳定一段时间会外出旅游，20.7%表示疫情过去后会尽快外出旅游，7.8%外出游意愿不强或者无所谓。越来越多的人相信：疫情终将过去，取消的旅行计划，会在更美时成行。

习近平总书记在大同市云冈石窟考察时指示，“发展旅游要以保护为前提，不能过度商业化，让旅游成为人们感悟中华文化、增强文化自信的过程。”过去我们满足于“看山看水看风景”，今天我们既要“美丽风景”，也要“美好生活”，我们既要“人间烟火”，也要“家国情怀”。俄罗斯今年胜利日纪念活动中，包括红场阅兵在内的所有群体性活动都被推迟，一些活动转到网络上举行，其中参加“虚拟游行”的人数将近 300 万人，包括向组织者发送老战士的照片并在网站上播放。在中国国庆、中秋假日期间，纯玩无购物、高星级酒店、专属导游、精致小团等成为旅游的关键词，定制旅游发展迅速并呈现出快速增长的态势。Tripadvisor 的数据显示，疫后游客面临心理上和行为上的双重改变，更注重环境卫生，也更愿意自驾以及选择去人好和环境好的户外，一米的社交距离使得一些户外活动以及自然风景区更受欢迎，比如徒步、沙滩休闲等（见图 7）。马蜂窝的数据显示，在“双节”期间，定制游订单占比显著升高，较去年同期上涨 24%，有不少中国游客选择自驾前往内蒙古、云南和西部省市开启长线自驾之旅。

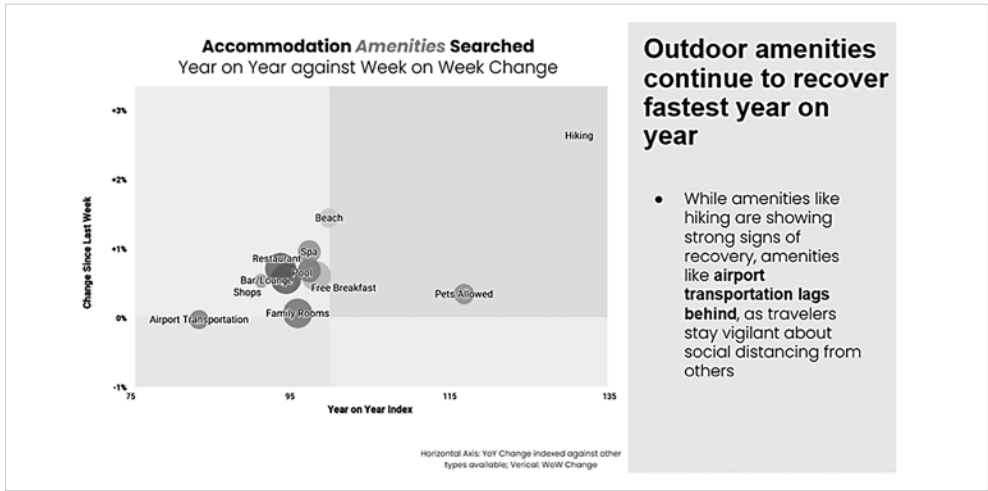


图 7 Tripadvisor 网站游客搜索热词

2. 商业模式的创新和产业格局的重构

新冠疫情暴发之后，旅游业面临转型升级，比如酿酒体验、博物馆参观、体育赛事、室内就餐和娱乐等，都需要重新设计以服务更小的旅游集体，具备更多户外活动、单人体验等，并且要有严格的社交距离限制等等。旅游企业为了达到新的标准已经升级了他们的清洁程序并对员工进行了培训。旅游从业人员也通过训练可以在旅行途中对疑似病例进行初判、保持旅行团体的和谐有序、监督游客的互动、防止团体传播。餐厅、酒店、机场以及公共空间提供无接触式服务。酒店入住、退房、开门、移动支付、预定等都可以通过手机 App 实现，包括自助查询服务机、屋内娱乐设施和目的地网上购物、机器人（接待、送餐、博物馆导游等）、人工智能推送娱乐购物网站以及提供聊天服务、数字支付等（电子钱包、电子信用卡等）。此外，电影院、机场、商场、博物馆、餐厅和酒店等公共场所都需要新的技术和方式更有效地保障观众的安全，增加消毒设施和消毒剂。机器人的使用变得更广泛，一些常规性的工作被替代，对旅游从业人员的文化素质要求更高。过度旅游的问题将得到缓解，预约旅游的普及将提高旅游质量。

疫情期间，部分旅游企业倒闭了，但是仍有很多旅游企业坚强的生存了下来，也有新的企业进入旅游业。经过疫情和市场双重洗礼的旅游业，必然迎来产业格局的重构，传统的产业需要走向现代，大的产业需要走向强的产业。日本酒店集团星野度假村 10 月 13 日宣布，随着全球经济从新冠疫情中复苏，旅游需求激增，公司将于 2021 年春季在中国开展酒店业务，并计划在浙江省东部开设酒店度假村。2020 年 10 月，加拿大航空已经与国际旅游运营商 Transat A.T. Inc. 达成交易，将收购 Transat 的所有已发行和流通股股票，并将其并入加拿大航空公司。

3. 全新的世界旅游发展体系

世界经济和国际旅游业将在疫后稳步恢复。新冠疫情目前正在全球范围内给人们造成高昂的损失，正对经济活动产生严重的影响。2020 年 10 月世行预计，2020 年全球经济可能收缩 4.4%，但中国经济增长率预估为 1.9%，是各主要经济体中增长率唯一没有呈负增长的国家，联合国相关报道称中国为“一枝独秀”。基线情景假设疫情在 2020 年下半年消退，防控措施可以逐步取消，在这一情景中，随着政策支持措施帮助经济活动恢复正常，全球经济预计在 2021 年将环比增长 5.4%（见表 2）。牛津经济研究院估计，到 2023 年，全球旅游业有望恢复正常。随着全球疫情防控和复工复产形势的变化，越来越多的国家和地区对开放跨境旅游持更开放的态度，全球旅游业也将在 2–3 年内稳步复苏。国际组织通过多种形式纷纷为国际旅游活动的重启发声，共同助力国际旅游业复苏。总之，没有任何力量可以阻碍人民之间的交流交往，疫情不会，其他的因素也不会，国际旅游持续向好的基本面不会改变。

表 2 世界主要地区与国家经济状况及预测

| 地区与国家 | 2019 年增长 速度（%） | 2020 年 GDP 增长速度（%） | 2021 年 GDP 增长速度（%） |
|-----------------|-------------------|-----------------------|-----------------------|
| 世界产出 | 2.8 | -4.4 | 5.2 |
| 欧元区 | 1.3 | -8.3 | 5.2 |
| 亚洲新兴 和发展中经济体 | 5.5 | -1.7 | 8.0 |
| 东盟五国 | 4.9 | -3.4 | 6.2 |
| 拉丁美洲和 加勒比海地区 | 0.0 | -8.1 | 3.6 |
| 美国 | 2.2 | -4.3 | 3.1 |
| 德国 | 0.6 | -6.0 | 4.2 |
| 法国 | 1.5 | -9.8 | 6.0 |
| 意大利 | 0.3 | -10.6 | 5.2 |
| 西班牙 | 2.0 | -12.8 | 7.2 |
| 日本 | 0.7 | -5.3 | 2.3 |
| 英国 | 1.5 | -9.8 | 5.9 |
| 加拿大 | 1.7 | -7.1 | 5.2 |
| 中国 | 6.1 | 1.9 | 8.2 |
| 印度 | 4.2 | -10.3 | 8.8 |

注：数据来源国际货币基金 IMF。

可持续旅游发展共同体正在形成。过去旅游是一个市场化程度较高、以私营企业为主的行业，未来多边国际组织、政府、事业单位等公共部门在旅游业中的作用将进一步凸显。我们将迎来一个全新的、生态的、可持续的世界旅游发展体系，该体系是新理念引领的全球共同的合作发展体系。该体系是公共部门、私营部门、社会力量相向而行，为保障人民的旅游权利、为推动产业可持续发展而共同形成的一个共同体。该共同体可使全球联合起来，共同面对和解决世界安全问题、公共卫生问题、环境问题、科技研发问题等诸多挑战。近年来，WTA 围绕旅游减贫案例分析、理论研究、经验宣传等方面，开展了一系列实践和国际交流活动，为旅游减贫的全球进程、产业植入和文件建设等方面做出了重要推动。在疫情常态化防控形势下，要进一步发挥 WTO、WHO、UNWTO、WTA 等国际性组织在世界旅游业发展中的重要的作用，各国各级政府为旅游业的发展配置更多的人才、资金、技术等产业要素。要正视旅行社、OTA、酒店、景区、铁路公司、租车公司之间等市场主体的国际合作，探索一条“旅游需求引导市场开放，旅游投资促进基础设施和公共服务体系的完善，游客与社区共享现代商业环境”的国际旅游合作模式，推动国际旅游战略合作伙伴关系新动力的机制化成长。

四、政策和行动：保持信心，相向而行，构建世界旅游命运共同体

保持发展信心，加快构建国内国际相互促进的旅游业新发展格局。在全球疫情形势发展尚不明朗、疫情迟迟得不到有效控制的形势下，国内外强劲的旅游市场需求亟待释放。要积极发展国内旅游业，尽早谋划入境旅游，做好疫情防控下的全面复工复产和各地区旅游业复苏工作。要以中国国内旅游快速复苏为借鉴，理性引导周边旅游、乡村旅游、自驾旅游等近程旅游消费趋势，通过近程旅游发展不断夯实各国的旅游市场基础，让旅游更加深入地嵌入到国民大众的日常生活中去，而不是游离在人民生活和社会经济发展体系之外。

适应需求变化，善用科学技术、文化创意、艺术时尚来引领旅游业的高质量发展。旅游一直与危机相伴，但旅游从未倒下。疫后旅游市场振兴不是要简单地回到过去，而是要积极地谋划未来。当前，5G、人工智能、大数据、无人驾驶、机器翻译、无接触服务等新技术，已经从根本上颠覆了传统的旅游消费方式，下一步必然会颠覆传统的旅游服务方式。要充分激发市场主体的积极性，面向市场需求的技术应用场景和商业孵化可能，通过科学技术、文化创意、艺术时尚的赋能，加上人才培养、产品研发和业态培育等基础工作，为旅游业做好疫情防控和应对中长期危机做好战略和技术储备。

加强经验总结和成就梳理，巩固多边旅游合作的互信基础。当前百年变局同世纪疫情相互叠加，但和平与发展的时代主题从未改变。要以抗击疫情和经济复苏为两大主线，加强各国旅游业应对疫情和疫后振兴等方面经验总结和成就梳理。在各国、各地区政府业界和相关机构之间建立旅游业信息合作共享机制，在政策研究、趋势研判、数据支撑和信息发布等方面进行深入广泛的经验交流和互利合作，以一带一路沿线国家旅游合作等为重点，探索对冲疫情和复苏经济的国际旅游合作经验，推动国际旅游合作在抗击疫情中得到进一步深化。

凝聚发展共识，为全球旅游业繁荣振兴提供思想引领和政策支撑。疫情发证以来，世界各国旅游业以及政府、业界和社会之间都在为旅游业的繁荣和振兴相向而行，越是在困难的时期，越是看到了旅游业的重要作用。以中国为代表的国家在应对新冠疫情国际重大公共卫生事件中，通过践行旅游商业共同体、旅游行政共同体、旅游学术共同体，已经逐渐形成了一套行之有效的支撑体系。要进一步呼吁各国政府特别是旅游、民航、安检、移民、边检口岸、防疫等部门加大对旅游产业和市场主体的大力支持，阐述包括但不限于中国在内的旅游发展先进主张、构想和智慧，通过理念创新和思想引领来凝聚未来国际旅游发展共识。

加强民众自由往来，推动全球旅游业包容、可持续发展。旅游业是一个和平的产业、生态的产业，也是促进世界和平与发展的重要力量，疫情常态化防控形势下，更需要一个全球化的

视野。当前，游客有意愿、企业有动能、社区有共识、各国政府合作有愿望，希望世界各国本着开放、创新、互利共赢的精神，尽可能消除旅行的壁垒，在安全保障的前提下，深化多形式、多层次的旅游合作，营造更加自由、便利、安全、舒适的旅行环境，造福各国人民。要进一步提升游客、企业员工和社区居民的满意度和获得感，更加关注包括但不限于环境变化、妇女和儿童保护、弱势群体权益、动物福利等重要议题，在应对挑战过程中，迎来更大的繁荣和发展的未来，把旅游业导向一个可持续发展的未来。

专题报告：中国旅游抗疫进程、成就和影响

1. 中国旅游抗疫进程

（1）疫情初期：停组团，关景区，重防控

为贯彻落实习近平总书记“把人民的生命安全和身体健康放在第一位”的重要指示精神，在科学研判疫情与旅游关系的基础上，文化和旅游部从春节假期第一天开始就采取果断措施，将工作重心从“保障供给，繁荣市场”转向“停组团、关景区、防疫情”，及时关闭旅游景区、博物馆、文化馆、剧院剧场等文旅场所，停止演出、外访、旅行社组团业务、公众聚集性活动、星级饭店大型活动，切实维护广大人民群众生命安全。从监测数据来看，有组织的旅游活动应声而减，直至全面停止。探亲访友的游客同比也减少了 76% 以上，目的地活动半径持续收缩至 2 公里左右，减少了近一半的预期消费。组团市场的暂停为散客市场释放了明确信号，实现了有效传导。如果没有这些果断措施，节前预计的近 5 亿人次游客在全国和世界范围流动，尤其是数百万出境和数千万国内的旅游团组，这么大体量的流动消费和集聚活动，完全有可能带来不可预估的疫情传播与扩散。

得益于旅游战线的理解、认同和相向而行，整个春节假日期间，94.25% 的游客对行程变化，以及政府和业界在特殊时期采取的非常举措表示理解。中国旅游研究院（文化和旅游部数据中心）通过中国旅游大数据自主调研平台，对疫情期间旅游心态和旅游行为进行了持续调查。数据显示，文化和旅游相关政策呼应了民众需求并得到绝对支持。疫情初期，大部分受访者就表示会主动减少庙会、游园、电影院、博物馆、游乐场、春节聚会等室外和场馆活动，除了担心自身安全和疫情更加严重外，“不给国家添乱”的家国情怀也是大多数游客取消行程的主要原因。调研还表明，广大游客对旅游行业的疫情应对和疫后走势持积极乐观态度，更完善的疫情应对方案和更有效的疫后刺激政策备受期待。针对“疫情结束后对旅游的态度和看法”，71.5% 的受访者表示疫情结束后稳定一段时间再外出旅游，20.7% 的表示疫情过去后尽快外出旅游。广大游客对政府决策的理解与认同，尤其是对旅游产业的认可，为春节期间旅游消费的平稳回落和有效筑底奠定了坚实的市场基础，也为疫中托底和疫后振兴积聚了现实动能。

（2）疫情中后期：积聚信心，托底行业，有序复工。

随着发改、财政、金融、商务、文化和旅游等宏观政策和地方政府具体政策效应的显现，旅游企业开始从初期的极度悲观和看不到未来的恐惧中缓过劲来，信心得以重新积聚，并开展形式多样的自救和互助行动。从业界舆情上看，越来越多的旅游集团、中小型企业和创业公司不再一味焦虑，把希望都寄托于政府出手救助，而是本着“企业自救、行业互助、政府托底”的理念，承担共同而有区别的责任。疫中的产业政策目标是着眼供给侧，托住行业力量不散的

底线，不能让旅游企业大面积倒闭，员工不能大规模失业，行业不能有现象级的负面舆情，尤其要防止产业链的上下游企业、生态体系的关联机构之间产生不应有的隔膜和撕裂。中央政府和发改、工信、商务、财政、金融等部门已经陆续出台，并还将继续出台一系列稳就业、稳市场、稳预期的政策。国务院常务会推出的阶段性减免企业社保费、实施企业缓缴住房公积金政策，让市场主体有了满满的获得感。

各级地方政府也从税收减免、奖励补贴、债务展期、扩大投资、复工复产等方面，加强了对受影响较大行业的支持力度。旅游行政主管部门如何在法律法规和行业惯例的框架下，协调包括境外航空公司在内的主要供应商和地接资源，引导企业承担共同而有区别的责任，将会成为完善旅游领域治理体系、提升治理能力的重要课题。旅行社、OTA、酒店、民宿、景区、主题公园，要讲作为旅游企业的特殊性，更要讲作为企业的共性，用足中央和地方扶持企业尤其是中小企业的普惠性政策。旅游行政主管部门暂返旅行社 80% 质量保证金的政策已经落实，正在通过疫情联防联控机制，就如何保证旅游企业的现金流等主要诉求，加强与民航、工信、发改、财政、金融、商务等部门的协调，认真研究并将适时发布具有行业特点的产业政策和行政举措。

（3）后疫情时期：释放需求，培育动能，全面推动旅游业高质量发展。

游客满意度高不高？旅游企业效益好不好？旅游产业发展后劲足不足？无论有没有这次疫情，这三个与旅游业高质量发展密切相关的现实问题都是旅游系统和旅游战线必须回答，也一定要回答好的。如果游客不满意，企业无效益，产业无后劲，就是没有这次疫情，随便一个风吹草动，旅游业还会沦陷。反之，广大游客满意了，愿意跟着行业走，员工有获得感，愿意跟着企业干，加上全面建成小康社会以后的经济社会环境的支撑，旅游业就不会有过不去的坎。

旅游业的高质量发展要求我们不能再走传统的资源驱动的发展模式，而要积极培育科技、教育、人才等新动能，向研发和创新要效益。要加强旅游基础设施和公共服务建设，释放避暑旅游、冰雪旅游、夜间旅游、亲子旅游、美食旅游、研学旅游、自驾旅游等新型消费需求。与此同时，发展入境旅游的决心绝不可以有丝毫的动摇，要以重组国家旅游推广组织为抓手，以签证便利化为突破口，推动国家旅游形象从传统走向现代。出境旅游的工作重点要进一步聚焦，抓好旅游安全、文明旅游和国际合作等重点工作。防控疫情是阶段性的工作，全年目标和任务的完成还是要回到“十三五”规划目标和“十四五”开局工作上来，回到旅游强国的战略目标上来。从这次疫情应对来看，旅游领域的公共治理能力，尤其是预警、干预、协调、指导和反馈的工具储备和运用水平，确实需要下大力气提升了。探索新时期的综合执法机制，通过创新包容式监管和容错性促进的制度，切实完善治理体系、提升治理能力，是文化和旅游系统疫后振兴和旅游发展的重要任务。

2. 中国旅游抗疫成就

受新冠肺炎疫情（COVID-19）影响，旅游市场经历了有组织旅游活动全面停滞、统筹疫情防控和有序复工、疫情防控常态化情境下国内旅游全面复业三个阶段。当前一个以国内旅游大市场为基础、国内旅游经济大循环、国内国际旅游经济双循环的格局正在形成，数字化新技术和新基建产业政策，奠定了我国旅游经济供给侧改革的新动能。

（1）旅游需求从谷底稳步回升，近程化、自主化消费态势明显。

一季度，有组织的旅游活动基本停滞，文化和旅游系统、旅游战线的工作重心从“繁荣市场、保障供给”全面转向“停组团、关景区、防控疫情”。3月12日，文化和旅游部下发通知，各地陆续恢复省内游、周边游和本地游，文化和旅游系统工作重心调整为“统筹疫情防控和有序复工复产”，旅游市场开始稳步回升。第三季度，尤其是7月14日恢复跨省游后，标志着我国旅游业进入了疫情防控情境下全面推进复工复产复业的新阶段，并带动全年旅游经济企稳向好。前三季度，个人游、家庭游、自驾游等非团队旅游市场一直都存在，近程化、自主化特征明显，广大人民群众开始欣赏身边的美丽风景、体验日常生活的美好。

上半年，国内旅游人数和收入分别预计同比恢复30%和23%左右，人均出游花费预计达到去年同期水平的75%，旅游满意度分别是80.07和81.31，处于高位运行水平且同比和环比均有所提升，这意味着疫情防控对旅游体验并未造成负面影响，通过疫情期间分时预约和承载量的控制，反而有利于提升游客满意度。从假日数据来看，清明、劳动、端午假日期间，全国国内旅游接待总人数分别恢复38.6%、53.5%、50.9%，旅游收入同比分别恢复了19.3%、36.7%和31.2%，旅游收入恢复程度滞后于旅游人数20个百分点。截至8月12日，共计93家中外航空公司（国内19家，外航74家）运营187条定期国际客运航线，每周执行210个往返航班，与50个国家保持定期客运通航，出入境市场恢复的迹象更加明显。

7月14日跨省游政策放开后，暑期出行带动的文化和旅游消费迅速回暖。7-8月，全国铁路累计发送旅客4.56亿人次，达到去年同期水平的7成。8月国内航空客运市场共完成4535.1万人次，已恢复至去年同期85%，达到今年以来月度国内旅客运输规模的最高值。去哪儿网数据显示，暑期上海、成都、广州等多个城市机票预订量超去年同期。疫后汽车租赁市场复苏态势喜人，个人短租、租车自驾游等领域发展迅速，大量新用户涌入租车市场，行业整体新用户占比达45%，行业整体规模已超越去年同期水平，有望在年底突破千亿元大关。城市公交、地铁、网约车、公共自行车等目的地小交通的客流量，也已全面恢复。

（2）企业发展信心全面恢复并趋于稳定，近程、定制和自驾等成创新焦点

疫情对企业现金流的冲击，使得一些企业剥离资产进行瘦身，而一些现金流充足的企业则开展跨界整合。如京东数科参投了东南亚最大OTA初创企业Traveloka的战略融资，投资金

额为2.5亿美元；携程与融创文旅达成线上线下战略合作协议；青岛西海岸新区海洋控股集团对同程金服进行战略投资；美团全面布局文旅板块；浙江旅游投资集团整合浙江旅游集团和浙勤集团资产；山东省属企业文化旅游、医养健康资产重组整合；海南省受政策利好新增注册旅游类企业达4000余家等。中国旅游研究院的专项调查显示：尽管承受了疫情的巨大影响，仍有95%以上的受访者表示不会离开旅行服务业。

受消费信心恢复规律和疫情防控要求的影响，都市周边休闲度假、省内跨地旅游、自驾游和定制旅游是市场需求的重点，也是商业创新的焦点。中国旅游研究院测算，前8个月全国乡村游、都市游、周边游和自驾游出游人数同比已恢复65%以上水平，重庆、上海、成都、西安、北京、广州、武汉、深圳等城市近程出游的热度较高。携程、去哪儿等平台数据显示，暑期自驾、自助、自由行等散客市场已恢复至90%左右，高品质、低密度、深体验的旅游产品预定恢复较快，占比约70%；酒店预订量恢复至去年8成，高星酒店预订量超去年同期；自然风光类景区和西部目的地成为热门目的地，长三角、珠三角周边游热度较高。

（3）市场主体多措并举，数字化和新基建等奠定了产业发展新动能。

前三季度，数字化有效激发了在线游戏、在线阅读、线上文博、云旅游等新型消费快速增长，以及相应的业态创新，充分表明，以“数字化”为代表的新技术和以“新基建”为代表的新政策，奠定了我国旅游经济供给侧结构性改革的新动能。当前，常态化疫情防控、实名预约等要求，客观上加快智慧旅游在行前、游中和评价各环节的应用，扫码入园、刷脸通行、无接触服务、机器人送餐等技术创新已经进入了消费场景。调查数据显示，劳动节假期通过预约游览景区的游客比例达77.4%，其中74.1%的游客认为预约旅游“体验很好”。近日，上海市文旅局发布《上海在线新文旅发展行动方案（2020-2022年）》，依托数字新技术，加强文旅业态模式创新、服务创新、管理创新。杭州发布数字经济旅游十景，旅游成为生动诠释杭州“数字经济第一城”发展成果的有效载体。

随着中央“新基建”政策出台，5G网络、数据中心等新型基础设施加快建设，加上简化项目审批、强化金融支持、鼓励发行地方债券、土地审批下放，减税降费、放宽能耗等政策，疫后有更多投资机构和市场主体跨界进入旅游业。4月以来，浙江、河南、广西等省多个文旅重大项目陆续开工，其中不乏百亿量级的投资。康养类、研学类、商旅类、夜游类、冰雪类、乐园类、智慧旅游等产业融合及科技创新类的项目正在加速布局，如张家界机器人欢乐城项目开工，新密恒大文化旅游康养城项目签约、可口可乐打造易拉罐沉浸式体验博物馆，民宿代表企业Airbnb恢复了上市程序等。

（4）旅游行政主管部门统筹疫情防控和复工复产复业成效明显

为应对疫情，文化和旅游系统坚决贯彻习近平总书记重要批示指示精神，从严、从紧、从细落实中央每一阶段的工作部署，始终把人民的生命安全和身体健康放在第一位，措施是得当

的，效果是明显的，群众是满意的。一季度，在文化和旅游部门暂还 80% 旅行社质量保证金、恢复省内旅游业务、景区预约开放等政策支持下，旅游企业逐渐稳住心神，开展多种形式的自救，共渡至暗时刻。二季度以来，随着发改、财政、金融、商务等综合部门的宏观政策和地方政府救市支撑政策的出台，加上商务旅行、探亲访友、休闲度假等需求恢复，旅游景区、主题公园，特别是城市公园、郊野公园和室外娱乐性的主题公园率先复苏，都市旅游、乡村旅游市场带动商务酒店、大城市周边民宿等复苏迹象明显。三季度，跨省游放开加上暑期档，文化和旅游部发布《旅游景区恢复开放疫情防控措施指南》，景区最大承载量提升至 75%，继续推动景区复工复产复业。各地政府也在积极作为，如重庆市政府发布《关于加快夜间经济发展促进消费增长的意见》，山西、河北、黑龙江等多地文化和旅游部门召开文旅发展大会，都在积极释放常态化疫情防控下复工复产的强劲信心。

（5）2020 年全年旅游业正从底部盘整迈向全面复苏。

在中国刚刚过去的国庆、中秋八天假期，文化和旅游系统坚决贯彻习近平总书记批示指示精神，从细从严落实中央统筹疫情防控和复工复产复业的工作要求，抓细抓实中央安全生产的指示精神，层层压实属地责任、监管责任和主体责任，景区、酒店、旅行社等旅游企业贯彻落实“预约、错峰、限流”管理要求，旅游市场呈现“平安、有序、繁荣、文明”的特征。今年国庆、中秋假期，无论是与去年国庆节假期旅游接待人次和旅游收入按可比口径的同比，还是与劳动节、端午节假期恢复程度的环比，我们都可以从官方数据得出结论：依托国内超级大市场，我国旅游经济已经进入疫情防控常态情境下全面复工复产复业新阶段，旅游消费信心全面恢复，旅游发展潜力全面释放。结合宏观经济和疫情防控形势，结合国庆节、中秋节假期旅游市场表现，我们对第四季度旅游市场恢复和产业发展保持乐观的预期，预计全年旅游经济呈“U 型”恢复和振兴发展态势将是大概率事件。出入境旅游市场取决于国际疫情、签证限制、航空开放等条件，预计四季度仍将在底部盘整，部分国家和地区会逐步恢复国际航线，解除对我旅游禁令，出入境旅游市场有望根据各国疫情防控形势在今冬明春逐步恢复。

3. 疫情对中国主要旅游行业的影响

景观之上的美好生活是景区复苏和振兴方向。随着疫情防控进入“常态化”阶段，旅游景区正在以崭新的姿态重新回到国民大众的日常生活空间。总体而言，与轻资产、低负债的旅行社，重资产、高负债的酒店和民宿相比，重资产、轻负债的景区虽然也受疫情影响较重，但是绝大多数旅游景区不至于破产倒闭。随着旅游市场的下沉和旅游消费的升级，游客对景区的诉求不再仅仅是美丽的风景，还有景观之上的美好生活，以及生活之中温暖的记忆和美好的感受。随着城镇化的快速扩张和高速交通网络的发展，过去感觉距离遥远的景区已经成了城乡居民的

日常休闲场所，面向本地居民的主题公园、游乐场、历史文化街区和文博单位，也成了吸引远方游客到访的非典型景区。景区的定义、内涵和外延都将迎来革命性的变化。既要满足国民大众看美丽风景、听历史故事的需要，更要满足游客分享品质生活的需要；既要满足游客白天视角的需要，也要关注游客夜间娱乐、餐饮、住宿等综合感受。

旅行社跨界服务主体多元化。新冠疫情对以旅行社、OTA 为代表的旅行服务商带来巨大挑战，旅行服务商开展多种形式的自救，但不同的市场主体有不同的表现，有的惊慌失措，有的乱云飞渡仍从容，有的加大创新发展的力度。疫情背后隐藏机遇，部分旅行社已经出现自救互助和资源整合现象。大型企业为线下旅行社进行物质和精神层面援助。物质上，如采取减免部分管理费等措施，尽可能让公司活下去；精神上，开发 APP 线上课程，对员工业务知识和技能进行培训，优化员工队伍，借“假期”补足短板。部分企业开展了联合互助计划，通过实施内部兼职招聘计划，有效利用了暂时冗余人员。疫情冲击也加速了行业洗牌和资源整合。面对黑天鹅事件，许多旅行社不仅着眼于眼下危机，挖掘危机背后机遇。在规模化生产经营领域，一部分中小旅行社可能会在细分领域越做越深、越做越精；另一部分考虑与大型名牌企业合作，成为其代理。部分门店亦进行跨界自救，搭建生活类社交电商平台，在不影响原经营业务、不打扰原客户群体、不压缩原市场体量的原则下通过私域流量变现，开启“电商卖货”“云旅游”“直播培训”等方式增加创收。如同程国旅与创业企业咪店开展合作、优势互补，进行线上商品推荐和销售，满足用户“旅游 + 吃喝玩乐 + 社交电商”的需求。众信旅游凭借“旅游 +”服务，实现了“用户 + 渠道 + 资源”的转化，有效降低了风险。

旅游住宿从异乡的生活走向社区的链接。疫情期间，以酒店、民宿为代表的旅游住宿业自觉肩负社会责任，为抗疫一线的医护人员、工作人员、志愿者、集中隔离的游客和社区居民提供高标准的住宿需求。原本我国旅游住宿业就存在行业薪酬过低、劳动密集、科技支撑和创新活力不足、盈利能力不强等结构性问题，疫情的冲击让疫后住宿业的恢复振兴与转型升级面临更大考验。在旅游住宿行业进入“防控型复工”新阶段，住宿企业正在积极创新住宿产品和服务模式，适时调整业务结构，推出企业专属居家隔离房、隔离办公室、“无忧客房”、“放心酒店”等新产品，以及“放心问诊”、“免费保险”、“无接触服务”等健康保障服务，有利于尽可能降低损失，恢复消费市场信心。在主客共享美好生活新空间的理论指引下，旅游住宿从异乡的生活走向社区，与社区生活共商共建，与本地商圈共生共荣。为推进旅游住宿业高质量发展，需要强化科技应用和文化创意，重构产业链和生态圈。酒店、民宿等旅游住宿业也是由多元利益主体共同构成的命运共同体，有投资回报的商业追求，也是共商共建的社会责任旅游住宿业，一定要给人以温暖的生活和向上的力量。

《世界旅游发展报告 2020： 市场复苏的信心与产业变革的挑战》课题组

总顾问：

刘士军 世界旅游联盟 秘书长

戴 斌 中国旅游研究院 院长

课题组成员：

何琼峰 中国旅游研究院 数据所所长

张 源 世界旅游联盟 综合业务部主任

李长林 世界旅游联盟 综合业务部副主任

刘雁秋 世界旅游联盟 综合业务部项目官员

郭妍君 世界旅游联盟 综合业务部项目官员

曾 甜 中国旅游研究院 数据所博士

丁昭涵 中国旅游研究院 博士后

侯平平 中国旅游研究院 博士后

胡咏君 中国旅游研究院 数据所博士

张佳仪 中国旅游研究院 数据所助理研究员

李慧芸 中国旅游研究院 数据所助理研究员

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The development of tourism has been accompanied by crisis, but it can always recover after a setback. Facing the sudden onslaught of COVID-19 in 2020, global tourism experienced a cliff-like drop. However, as we can see, the impacts brought by the pandemic are temporary, and a series of response measures to address these impacts such as international cooperation, government actions and industry self-rescue have produced tangible results. Post-epidemic rejuvenation of the tourism market is not about simply returning to the past, but about taking the initiative to make future plans. It's imperative to foster a new development pattern where domestic and international tourism promote each other, make good use of science and technology, cultural creativity and art fashion to navigate high-quality development of the tourism industry, and contribute to the prosperity and revitalization of global tourism industry with ideological guidance and policy support. We should further improve the satisfaction and sense of gain among tourists, corporate employees and community residents, and pay more attention to many key issues, including but not limited to environmental changes, protection of women and children, rights and interests of vulnerable groups and animal welfare. Through these efforts, the tourism industry can be guided to a more prosperous and sustainable future.

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WTA

I. What Has Happened Effective Industry Response to Unprecedented Epidemic Impacts

1. Lost Market

COVID-19 has caused a cliff-like drop in the global tourism industry. To respond to the COVID-19 pandemic with high infectivity and rapid spreading speed, the governments have quickly imposed a curfew nationwide and implemented travel control, customs closure, flight suspension, scenic closures and other restrictions. A larger number of orders for hotels, flights and OTA platforms have been refunded. Due to capital shortage, many large-sized tourism companies have suffered a significant impact on employment and investment, and even been declared bankrupt. The number of global tourists and the tourism revenues has dropped sharply. The global tourism industry was greatest hit in Q2, when the number of international tourists dropped to a minimum in April and slowly recovered from May (Figure 1-3). In April, 96% of the world's tourist destinations implemented travel restrictions, of which 90% closed their borders completely or with specific countries/regions. As of July 30, 53% of countries in the world still closed their borders completely or with specific countries/regions. Affected by synchronized slowdown in global growth, the COVID-19 pandemic features a wider affected scope and a longer duration compared with SARS. UNWTO has lowered its expectation on tourism growth in 2020. It's likely the negative growth rate of global tourism will exceed that in 2003.

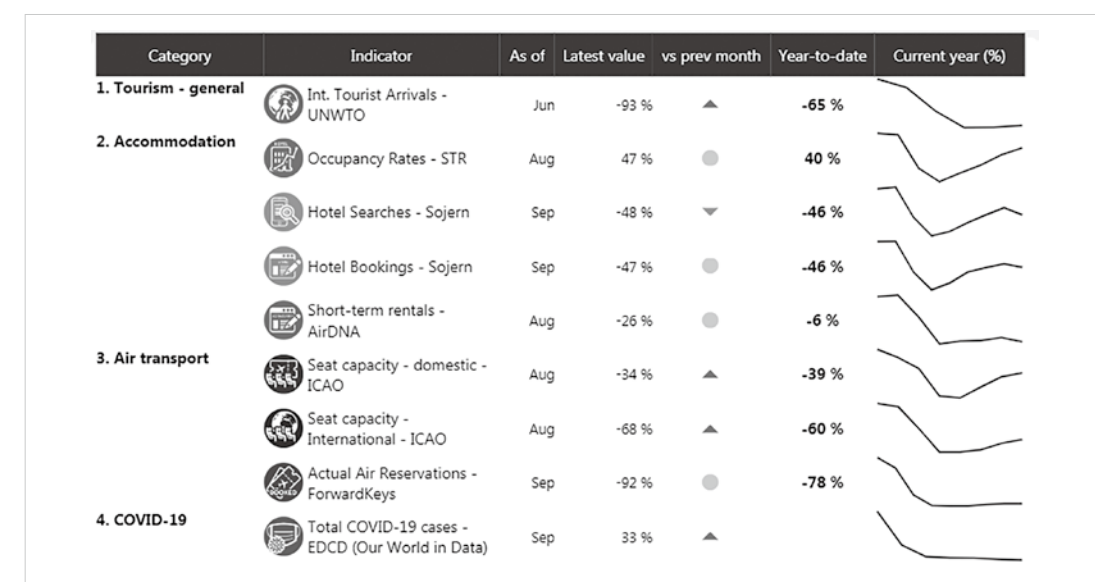


Figure 1: Overall Impacts of the COVID-19 Pandemic on Global Tourism (Source: UNWTO)

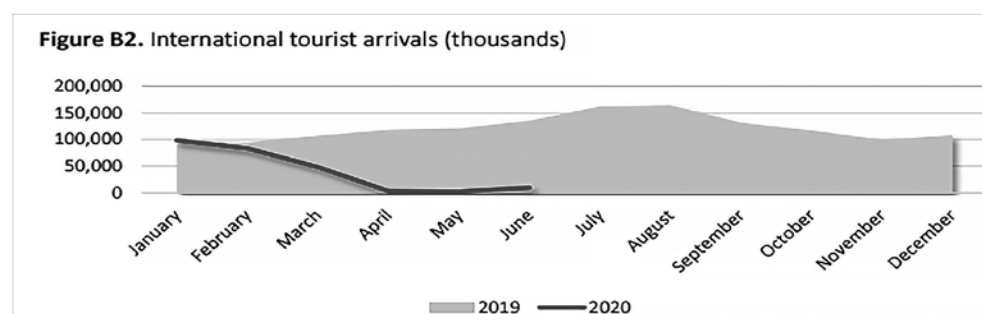


Figure 2: Comparison of the Number of International Tourists in 2020 vs 2019 (Source: The World Bank)

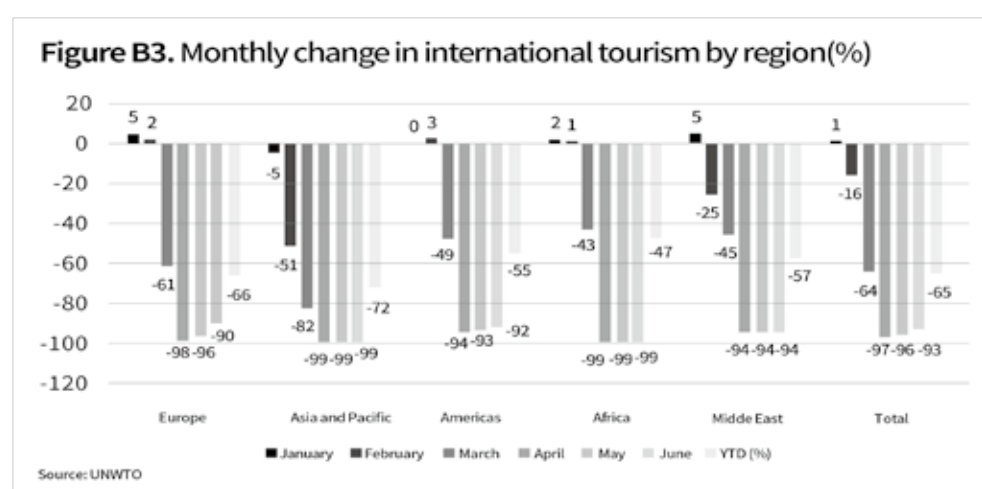


Figure 3: YoY Changes in International Tourism Industries of Various Regions (Source: The World Bank)

As the pandemic is evolving disparately around the world, the pace of recovery in international tourism markets is constrained by the weaknesses of different countries in epidemic control. The comparison of epidemic data of major tourism countries published by the World Health Organization shows that, the development process of the epidemic can be roughly divided into three types (Table 1), including: China and other countries that took strict control measures immediately upon its outbreak. In these countries, the peak of the epidemic occurred before April, including Thailand, Germany and Italy; India and other countries that failed to take control measures in time. In these countries, the peak of the epidemic occurred after July, including Mexico, the Philippines and the United States; and France and other countries that relaxed travel restrictions too early and suffered from a second wave of infection. In these countries, the peak of the epidemic occurred at two times, including the United Kingdom, Australia, Austria and Japan. According to UNWTO, COVID-19 cut the number of global inbound tourists to minus 50 percent in H1 2020. The Asia-Pacific region was among the most affected regions, with a decline of 72%, followed by Europe, the Middle East, America and Africa. From January to August, the global hotel occupancy rate was 40%, of which Africa was the lowest at

28%. From January to September, global hotel orders fell by 46% on a year-on-year basis (Figure 4). As of June, European countries including France, the United Kingdom and Germany, Asian countries including Japan, South Korea and India, as well as Oceanian countries including New Zealand and Australia have made cautious attempts to lift border controls by stages. At present, the COVID-19 pandemic has evolved into an international event. Whether the international tourism market can fully recover depends on the shortest board of epidemic control.

Table 1: Development Stage of the COVID-19 Pandemic in Major Countries

| Country | Cumulative confirmed cases | New cases in the last 24 hours | Cumulative deaths | Stages of epidemic development |
|-------------|----------------------------|--------------------------------|-------------------|--------------------------------|
| U.S. | 7,471,688 | 52,458 | 210,338 | Control stage |
| China | 91,252 | 40 | 4,746 | Control stage |
| Germany | 314,660 | 4,516 | 9,589 | Control stage |
| U.K. | 561,819 | 17,540 | 42,592 | Rebound stage |
| India | 6,906,151 | 70,496 | 106,490 | Control stage |
| Japan | 87,639 | 619 | 1,616 | Control stage |
| Italy | 338,398 | 4,458 | 36,083 | Control stage |
| France | 644,573 | 18,071 | 32,287 | Rebound stage |
| Mexico | 774,020 | 4,462 | 80,083 | Control stage |
| Australia | 27,206 | 24 | 897 | Control stage |
| Spain | 848,324 | 12,423 | 32,688 | Control stage |
| South Korea | 24,476 | 54 | 428 | Control stage |

Notes: Source: WHO; Deadline: October 10, 2020

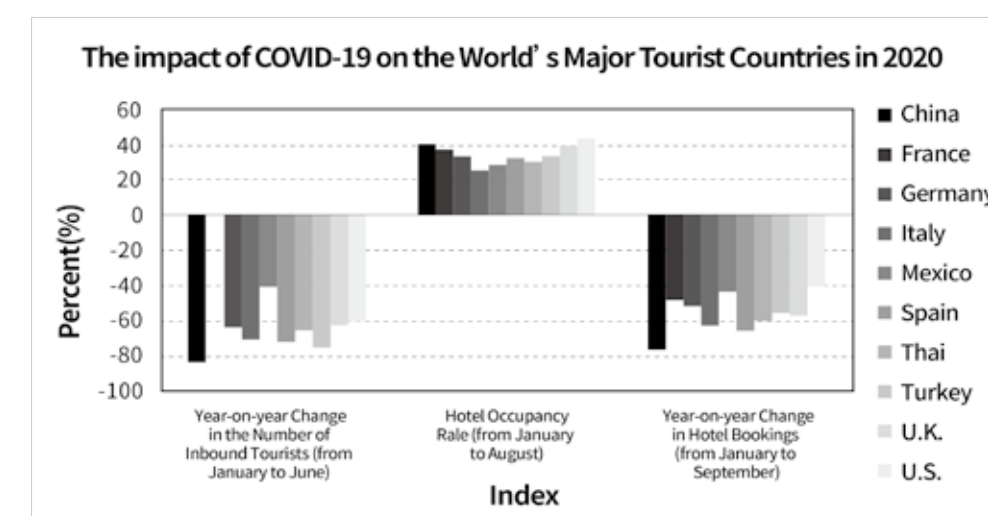


Figure 4: Impacts of the COVID-19 Pandemic on Major Tourism Countries in the World in 2020 (Source: UNWTO)

The Chinese outbound tourism market was on the decline, significantly affecting the prosperity of the international tourism economy. COVID-19 has caused a sharp drop in Chinese outbound tourism market. The tourism market of many countries in the Asia-Pacific region presents an obvious tendency of over dependence on China, with local airlines, travel agencies, accommodation, catering, car rental services and other industries relying heavily on the consumption expenditures of Chinese tourists. The COVID-19 pandemic resulted in a slump in Chinese tourists, making it difficult for local tourism industry to survive, and many travel agencies, hotels, and restaurants fell into business dilemmas. Major destinations including Macau Special Administrative Region of China, Thailand, Japan, and South Korea have been hit hard. Statistics show that due to the outbreak of COVID-19 in 2020, the number of inbound tourists to Macau Special Administrative Region of China dropped sharply from 2.85 million in January to 210,000 in March, a decline of over 90%. According to the projections of the Tourism Authority of Thailand (TAT), COVID-19 could reduce the number of Chinese tourists visiting Thailand by 60% this year. NHK WORLD-JAPAN reported on April 16, Japan's tourism industry was hit hard by the epidemic, evidenced by a YoY decline of 44% in the consumption of Chinese tourists, amounting to JPY 234.8 billion (approximately RMB 15.4 billion). According to the Jeju Tourism Association, from February 1 to March 1, there were only 4,355 Chinese tourists visiting Jeju Island in South Korea, down 94% year on year.

2. Steady Recovery

Domestic tourism of major countries is entering a new stage of resumption of work and production to varying degrees. COVID-19 has posed different impacts on the tourism industry of various countries in the world, triggering different responses to the epidemic as well. However, since June, we have seen various countries move to a steady resumption of work and production to varying degrees (Figure 5). China's tourism economy, supported by its domestic super market, has entered a new stage of all-round resumption of work and production under the normal epidemic control. During the eight-day holiday of National Day and Mid-Autumn Festival, China alone received 637 million domestic tourists, a year-on-year recovery of 79.0% on a comparable basis. The tourism revenue of RMB 466.56 billion was achieved, a year-on-year recovery of 69.9% on a comparable basis. Compared with the Dragon Boat Festival holiday, the recovery progress has increased by 28% and 39%, respectively, sending a signal that the fundamentals of China's tourism economic growth amid stability are further consolidated. Many hotels in Hallstatt, a tourist town in Austria, have reopened since mid-June, and the number of reservations has continued to increase, ushering in a shortage of hotel guest rooms and parking lots. In addition to local tourists, the tourists from neighboring countries such as Germany and Hungary also occupied an increasing proportion. The total number of tourists visiting some destinations in France in summer has increased from last year, with some places reporting a growth rate of more than 10%. In Malaysia, the total room reservations in June increased by nearly 190% compared to 2019.

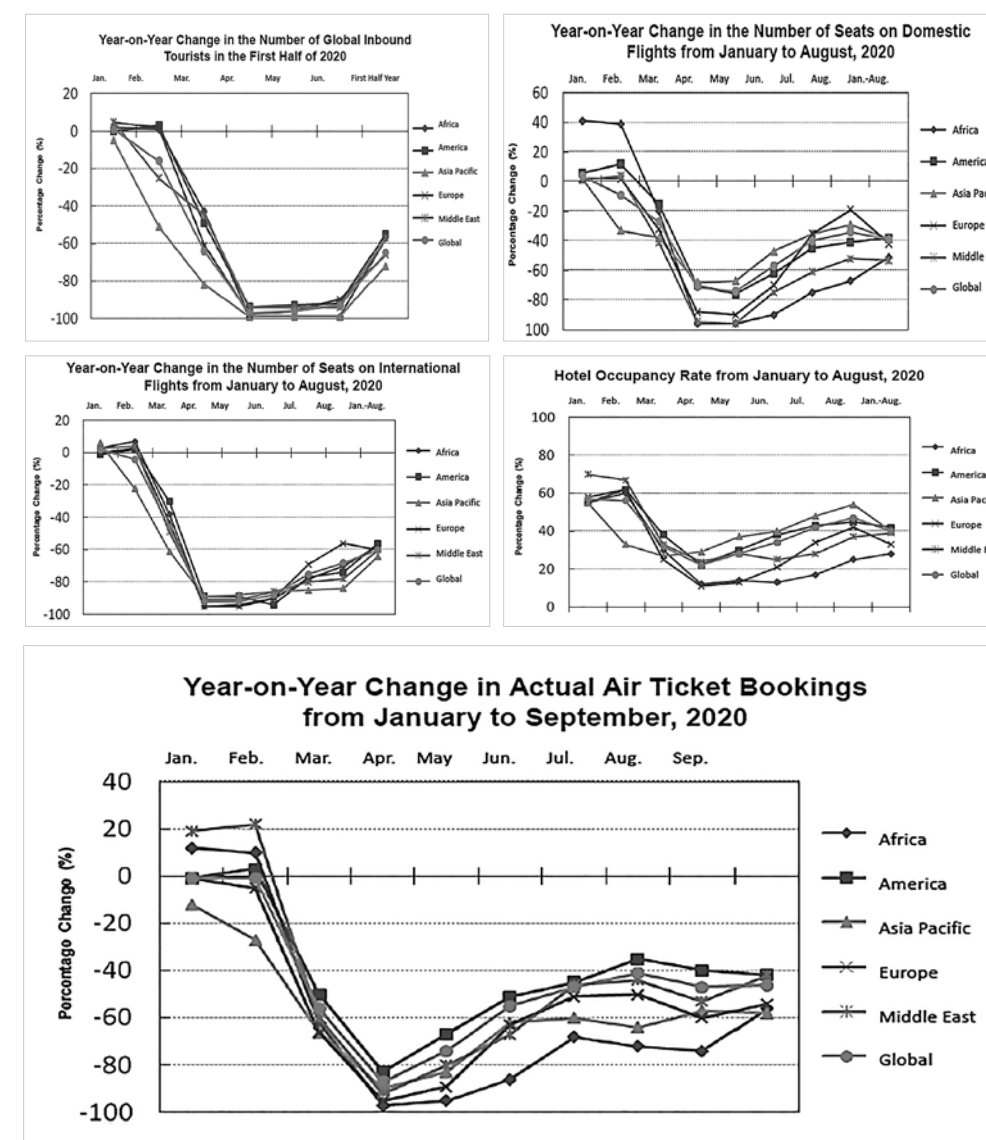


Figure 5: Impacts of the COVID-19 Pandemic on Tourism in Various Regions around the World (Source: UNWTO)

3. Industry Self-rescue

From the very beginning, the tourism industry has been at the forefront of this battle against COVID-19. The effectively blocking of virus transmission and spread due to tourism activities was at the cost of huge losses incurred to travel agencies, OTA, hotels, scenic spots, shopping malls and other tourism companies that also undertook unprecedented financial and employment pressure. Traditional travel agencies such as China Tourism Group, Caissa, HCG International Travel Group, U-TOUR, CGZL, Spring Tour, and online travel operators represented

by Trip, Meituan, Fliggy, TravelGo, Tuniu, etc., responded to the call of the state in the fastest gesture to launch subscription cancellation services with full refunds, in spite of business shutdown and enormous losses. Corporate customer service staff insisted on working overtime to provide unsubscription services for customers. People enjoying free unsubscription services expanded from confirmed cases, accompanying travelers to various personnel. All categories of online orders and products can be cancelled through manual operations to later online self-service. In this fight, the majority of tourism companies have taken the initiative to bear pressure, deepening tourists' recognition of the government's emergency decision-making and the quality of tourism services. Many hotel groups and sharing accommodation platforms such as BTG HOMEINNS Hotels Group, WeHotel, Plateno, Tujia, Sweetome Group, Huazhu, Airbnb and Dossen provided tourists with free reservation cancellation guarantees and free accommodation for medical staff in Wuhan. Meituan Hotels launched accommodation services to facilitate resumption of work in cooperation with several hotels including Huazhu, Home Inn and Plateno so that people who returned to work can live securely without worrying about the virus. Many airlines including Spring Airlines transported rescue supplies on their flights free of charge during the epidemic. Many Chinese team leaders and tour guides in foreign countries participated in fund-raising activities, and transported scarce supplies such as masks and safety goggles from abroad. In assisting tourists to change their itinerary, our tourism companies have upheld the industry values of "visitor first, sincere service", delivering positive industry energy online.

Enterprises actively worked with each other to survive the crisis, gathering self-repair and R&D innovation momentum. To echo the initiative of associations and chambers of commerce, upstream and downstream enterprises and partners also launched mutual assistance actions across the industry, which received support from tourism groups. To help 7,500 affiliated hotels prevail over difficulties, Jin Jiang International (Holdings) Co., Ltd. raised the assistance funds of RMB 3.5 billion. The practical measures included providing them with liquidity support loans and material procurement loans at an interest rate of less than 4.5%, as well as reduction and exemption of initial fees and management fees. China Tourism Group launched new services such as "online bus mall (HKCTSBUS)" and online booking of duty-free goods. From January 27 to February 13, 2020, the online sales of the duty-free shopping mall in Sanya recorded a cumulative growth of 92% YoY. In addition to providing tourists with order refund and change services free of charge, China Lingnan Group also launched safe take-out services to deliver delicious dishes cooked by famous chefs for residents on request through Lingnan Hotels and CGZL ECWALK platforms. Trip.com Group established a guarantee fund of RMB 100 million against major disasters to share with its suppliers and partners the loss of order refund and change services free of charge. The online platforms represented by TravelGo took the initiative to expand their e-commerce retail business. China Eastern, Spring Airlines, Juneyao Air, China Express, Chongqing Airlines, and Sichuan Airlines, among others, took the traffic demand of orderly resumption of work and production across China as an opportunity to actively launch

charter services with flexible prices. The cultural and tourism industries provided diverse digital cultural products to meet people's online entertainment needs during the epidemic. The National Cultural Heritage Administration temporarily opened more online exhibitions on its website "Online Exhibition of the Museum" and presented them through new media and VR technologies. During the epidemic, a total of more than 2,000 online exhibitions were organized by museums across the country. The China Audio-video and Digital Publishing Association launched an initiative to call for digital reading enterprises to open selected resources for users free of charge, participated in by dozens of enterprises including China Literature Limited and Himalaya. Multiple films such as Lost in Russia were released online for free on TouTiao and other platforms, changing the original mode of cinema screening and meeting people's online cultural needs during the epidemic.

4. Response Actions Taken by the Government

Carry out effective policy research, trend judgment, data support and information release. The Chinese government organized professional institutions to carry out special research and professional calculations, as well as professional statistics, calculations and evaluations in a timely manner, with an aim to avoid industry-wide panic through scientific assessment on the impact of COVID-19. Taking the seven-day Spring Festival holiday as an example, the organized group and tourist activities other than visiting relatives and friends were greatly reduced and even totally ceased. However, group tourists, independent tourists and the tourists visiting relatives and friends who arrived at destinations before the festival also created basic consumption of dining, accommodation, shopping, communications, etc. The France Tourism Commission regularly convened meetings to provide support for the industry. The Austrian Ministry of Agriculture, Regions and Tourism organized close discussions with the current situation and countermeasures with personnel related to the tourism industry. Singapore established a special team for tourism recovery to converge the forces of representatives from travel agencies, tour guides, airlines, hotels, etc. in various departments and industries. South Korea regularly held videoconferencing with tourism departments and enterprises to assess the current crisis faced by the industry and explore the countermeasures. Thailand implemented a big data storage system development project. Germany set up a special epidemic navigation website to feed tourism practitioners with the updated news and advice. The Ministry of Tourism (Greece) required the Crisis Management Committee to quickly respond to this crisis, so as to reduce potential destructions imposed by the epidemic on the tourism industry, protect tourists and resume their confidence. UNWTO set up the Global Tourism Crisis Committee (GTCC) to cope with the tourism development crisis caused by the epidemic.

A series of fiscal and monetary reliefs and incentives have been issued. To help enterprises survive this crisis, the Chinese government unveiled many favorable policies such as labor

costs reduction, reduction and exemption of tax, rent and energy cost and provision of financing support, and returned the service quality guarantee deposits to travel agencies for easing their cash flow pressure. Norway reduced the value-added tax on passenger transport, accommodation, cultural activities and scenic spots from 12% to 8%, which will be still valid before October 31. Germany also introduced the value-added tax reduction and exemption policy for the tourism and leisure industry. Turkey directly reduced the value-added tax on domestic flights from 18% to 1% within three months. Iran, Malaysia, Singapore and South Korea implemented the deferred tax policy for airlines, hotels and catering enterprises. Egypt also introduced the deferred tax policy for tourism and hotel enterprises, and exempted the rent of all operators in the markets and restaurants around historical sites before the tourism industry starts to recover. The Central Bank of Egypt provided low-interest loans to companies that were still paying employee salaries during this epidemic. Colombia reduced the value-added tax rate on all air tickets to less than 5%, while the Ministry of Commerce, Industry and Tourism increased the line of credit to help tourism enterprises address the shortage of cash flows. Australia waived several flight and passenger-related expenses for the aviation industry. Fiji announced a new hotel investment incentive program. Italy and New Zealand provided financial support for state-owned airlines. Russia also deferred the tax payment of tourism and aviation enterprises. Singapore lowered the airport charges. Africa provided additional funds for SMEs in the tourism industry. All tourism enterprises in Austria can apply for suspension of repayment in 2020 regarding the loans made before the outbreak of COVID-19.

Provide professional training on sustainable employment and issue favorable policies in this regard. China launched a care guarantee plan for offline stores through online OTA operation platforms, which supported offline stores, reduced their burden and preserved their strength by reducing store management fees, extending the contracting task limit, and implementing training promotion plans. To make full use of the period of business suspension, some scenic spots formulated internal improvement plans, and organized online training, communication and learning activities to improve employees' professional knowledge and skills, and their capabilities of crisis management and emergency management. In Bulgaria, the government provided insurance premium subsidies for the employees of hotels, restaurants, travel agencies and contractors. In Greece, workers whose labor contracts expired during the epidemic can receive subsidies, and their social insurance and medical expenses were borne by the government. Italy introduced a policy allowing tourism and cultural industries to defer the payment of withholding taxes as well as social security and welfare fees. Japan increased employment subsidies to prevent the employment rate from dropping. Cambodia organized re-employment trainings for people who lost their jobs, and paid 20% of the minimum wage for employees in hotels, guesthouses, restaurants and travel agencies. Spain curbed the occurrence of temporary collective layoffs and supported enterprises to extend the term of workers' contracts. Sweden reduced short-term layoffs by providing wage subsidies for employers. The Israel Ministry of

Tourism opened online courses and professional seminars to enhance people's employment capital, especially for hotels, travel agencies, tour guides and other tourism professionals. The Egyptian Hotel Association trained hotel staff on the Guidelines for Epidemic Prevention and Control issued by WHO, so as to promote epidemic prevention and control in an effective way.

A package plan for restart of the tourism industry and resumption of domestic tourism activities has been released at the right time. Since mid-May, some countries have begun to announce the restart of tourism and promote the recovery of domestic tourism activities by relaxing travel restrictions. As of September, more than 50% of global destinations had begun to relax travel restrictions, of which advanced economies and emerging economies accounted for 79% and 47%, respectively. China relaxed the travel restrictions by stages, that's, opening intra-provincial tourism activities at first, and then inter-provincial tourism activities after the epidemic was brought under effective control. The traffic restrictions on scenic spots were also gradually increasing, from initial 30% to 75% during the National Day holiday. Europe, Asia and Pacific Island countries also started to take actions for tourism recovery, New Zealand and Australia opened a "travel bubble" plan for travels between the two sides. The Spanish Tourism and the Institute of Spain for Tourist Services established a safe travel certification system which is certified by the Ministry of Health. The Ministry of Health can issue a series of epidemic prevention guidelines through this system, thereby reducing the virus spread in hotels, golf courses, camping, and travel agencies, and other areas of the industry. On the market front, the governments of Italy, Iceland and South Korea issued domestic travel cash coupons. Singapore funded a market cooperation project to speed up digital transformation of the tourism industry, mainly providing online trainings for tourism practitioners. Egypt reduced or exempted tickets for scenic spots, as well as the visa fees for entry.

Continue to improve the governance system and governance capabilities in the tourism sector. In response to the sudden impacts of COVID-19 on the economy, most countries around the world have implemented loose economic stimulus policies (including fiscal and monetary measures), as well as employment support and other measures in the package plan, which includes reduction or deferral of value-added tax and personal income tax, and emergency financial assistance. Out of 220 countries and regions involved in the survey of UNWTO, 167 countries were reported to adopt special measures to deal with the impacts brought by the epidemic; 144 countries implemented fiscal and monetary policies; and 100 countries put in place specific policies for employment support and training. Compared with countries in the America and the Middle East, Asian, African and European countries have taken more active response measures. The PHEIC warning mechanism proposed by the World Health Organization (WHO) after SARS has been activated six times in the past 15 years, including for this COVID-19 pandemic. Many countries including China have scored an important victory in promoting normal epidemic prevention and control through continuous improvement of the governance

system and governance capabilities in the tourism sector during the epidemic. China has, under the unified leadership of the central government, scientifically evaluated the impacts of COVID-19 on the market and industry, fully drawn on international and domestic experience in the past, made scientific judgments and organized calm responses based on three development stages of the outbreak, mid-late and post-epidemic periods. China's central government as well as NDRC, MIIT, Ministry of Commerce, Ministry of Finance, and financial departments have successively introduced many policies, with more policies to stabilize employment, the market, and expectations underway. Local governments at all levels have also issued many preferential policies such as tax reduction and exemption, incentives and subsidies, debt extension, more investment, and the resumption of work and production, while scientifically analyzing increased return trips, growing national leisure demand, and increasing pressure on corporate finance and employee employment. Breakthrough achievements have been made by introducing policies to support enterprises and implementing discretionary and precision regulation to guide the industry-wide self-help campaign through mutual assistance.

II. What is Happening Now Bid Farewell to the Darkest Moment, March towards a Bright Future

1. The Confidence in Tourism Consumption is Recovering

The advancement of vaccine R&D and the correct application of public health measures have alleviated the epidemic and gradually recovered the confidence in tourism consumption. As of September 2020, 53% of destination countries had cautiously relaxed travel restrictions to reduce the huge economic loss and lower the unemployment rate caused by travel bans. According to data from the China Tourism Academy (Data Center of the Ministry of Culture and Tourism), in eight-days National Day and Mid-Autumn Festival, the average travel radius of tourists reached 213.0 kilometers, and the average recreation radius at the destination reached 14.2 kilometers, an increase of more than 56% from the Labor Day and Dragon Boat Festival holidays; A total of 35.8% tourists visited the destinations where the epidemic had been effectively controlled, and selected intra-provincial or short-distance tourism routes instead of domestic medium- and long-term ones. The proportion of inter-provincial travel was 29.1%, and the proportion of tourists travelling within 300 kilometers was 83.5%. Many people had two short trips and visited local leisure scenic spots for multiple times after returning in the middle of the holiday; A total of 85.0% tourists participated in various cultural and leisure activities, of which 41.8%, 40.5% and 27.1% visited historical and cultural blocks, museums, and art galleries, respectively. From October 1-8, a total of 156,300 tourists visited Macau Special Administrative Region of China, of which tourists from the mainland accounted for more than 93%, greatly



Figure 6: 20 Countries with YoY Growth in Weekly Domestic Hotel Orders on Tripadvisor Website

injecting vigor into the Macau Special Administrative Region of China tourism market. According to the latest data of Tripadvisor in September 2020, the weekly bookings of domestic hotels in 20 countries had exceeded the level in 2019 (Figure 6).

2. New Drivers for Industrial Innovation Momentum are Forming

Tourism is still one of the preferred sectors with the greatest investment value. At 2020 Tourism Investment and Financing Conference specially set up by the China International Fair for Trade Services, the total amount of contracts signed reached RMB 15.71 billion. Lindblad, an expedition cruise company in the United States has obtained the financing of USD 85 million in the form of convertible preference shares. Howzat Partners, a European venture capital institution, has recently planned to raise USD 120 million (EUR 1 billion) to invest in more tourism and digital startup companies. KKday, a destination tourism e-commerce platform, has obtained the C-round financing of USD 75 million. The lead investor Cool Japan Fund (CJF) was mainly funded by the Japanese government, aimed at boosting the demand and development of products and services in Japan. Fly Now Pay Later, a tourism and fintech startup, obtained the A-round equity and debt financing of EUR 39.2 million. Airwallex, a global cross-border payment platform, has completed the financing in the D+ round, in which Alibaba Entrepreneurs Fund was introduced as a new investor. Intel acquired Moovit, an Israeli travel App, with USD 900 million. Integrating the functions of journey planning, bus routes, and travel reminders, this App has deployed its autonomous driving technology on approximately 60 million cars.

The development of science and technology brings diverse innovative tourism experience modes. Amazon launched Amazon Explore, a virtual travel experience service, allowing users to learn and explore latest news through video interactions via live broadcast. Some projects also support direct shopping and the experience projects include sightseeing in Mexico City, walking in Prague's Old Town, personalized store guide, and guidelines for making Japanese sushi. Klook is cooperating with the Tourism Authority of Thailand (TAT) to carry out "Amazing Thailand Safety and Health Administration: SHA" certification to prepare well for the restart of the tourism industry and enhance tourists' sense of safety when visiting Thailand after the epidemic. The German National Tourist Board (GNTB) and Baidu Zhidao took a lead in launching a recovery plan. Baidu Zhidao launched the "Knowledge and Action Plan", and carried out activities in cooperation with Germany under the theme of "Comprehensive Knowledge for Traveling in Germany" and by means of digital promotion to jointly create a diversified interactive Q&A ecosystem. Google is working with chain hotels on introducing Nest Hub smart displays and Google Assistant into guest rooms.

Characteristic culture catalyzes the innovation in tourism business formats. Based on in-depth exploration of own unique cultures, the ministries of culture and tourism of various

countries have shown a good integration trend, giving birth to many tourism industry forms. In 2019, in the League of legends S9 global finals in Paris, 50,000 visitors watched the e-sports competition onsite. Its popularity was comparable to that of the FIFA World Cup. In 2019, the German National Tourist Board (GNTB) launched the "Bauhaus 100" theme jointly with Bauhaus University Federation, under which the rooms in Bauhaus Universität Weimar were created through virtual technology, providing online visitors with immersive experience and allowing them to pay tribute to classics from the perspective of cultural tourism. In order to help foreign tourists experience local unique history and culture in depth, Australia launched multiple "city walking tours" such as the "2-hour walking tour across Fremantle", along which the tourists can visit prisons in colonial Australia and the famous local Fremantle market.

Market entities are actively exploring the way of transformation and upgrading. As epidemic prevention and control gets normal gradually, many tourism practitioners started to explore the ways of recovery and industry transformation and upgrading. Recently, on Mafengwo.cn, a Chinese tourism social sharing website, the "GoEuGo" Chinese tour group has become favored on the live broadcast channel. It selects a tourist destination in Europe and accompanies tourists to enjoy the exotic beautiful scenery and learn about local culture and customs through "cloud tourism". The themes launched include "Interpreting Paris with Da Vinci Code", "Wandering along the Xiaoxiang Street on No.1 Avenue in Budapest", "Little Rome in the United Kingdom-Hot Spring Resort Bath". Swiss hotels launched special offers, with the room rates even about 70% cheaper than the pre-epidemic level. Residents in European countries also took the initiative to explore the ways of making a living, and many businesses introduced the mode of dining in "outdoor food stalls". Japan Airlines provided sightseeing flight services through passenger aircraft on international routes taking off and landing from Narita International Airport. The passengers can not only watch the sunset and starry sky, but also taste the in-flight package of the Hawaii route. French local tourism companies successively opened multiple live courses on tea culture, intangible cultural heritages, etc., to attract traditional culture fans, and co-hosted online tour guide training courses entitled "360 Cultural Space".

3. Policy Support Starts to Take Effect

The integrated development of cities and tourism becomes increasingly prominent. In order to deliver better travel experiences to tourists and enhance the satisfaction of tourists traveling in their own countries, various countries have made plans for tourism-related services and facilities in the long term. According to Beijing's Urban Master Plan, Beijing will be built into a harmonious and livable city that provides more convenient services as well as more comfortable and more beautiful environments, an ecological city surrounded by blue sky, clear water and forests, and a center for international communication that demonstrates cultural confidence. The latest goal set in the plan for the development of Greater London is to develop London into a level higher than

any other cities in the world and build it into a world's leading city that can increase development opportunities for citizens and businesses, provide beautiful environments and comfortable living conditions, and help address various challenges, especially climate change facing the 21st century by 2036. On June 6, 2019, the German cabinet adopted the Overall Planning for the Urban Natural System proposed by Ms. Svenja Schulze, German Federal Minister for the Environment. This Planning seeks to protect species and biodiversity in cities, reduce the negative impacts of climate change and ultimately improve the quality of people's life. The Federal Government will support municipal authorities in integrating nature and green spaces into the urban landscape. The Federal Government hopes to build more natural landscapes in urban parks, sports facilities, cemeteries, private courtyards, urban forests, streams and rivers, as well as the buildings around urban centers.

The conditions to support road traffic facilities and other infrastructure are being further consolidated. Major tourist countries in the world have, based on the high-quality development of own tourism industries, vigorously optimized and upgraded own road and transportation facilities for the convenience of tourists. China's mid- and long-term railway network planning aims to build a railway network of 175,000 kilometers by 2025, including high-speed railways of about 38,000 kilometers, and basically realize connectivity both internally and externally, build smooth inter-regional roads, connect high-speed rails between provincial capitals, quick access to cities and basic coverage of counties by 2030. The German Transport Development Planning (2030) proposes to build a sustainable transport network and support 1,000 urgent priority projects in the area of transport infrastructure construction with EUR 269.6 billion. Some tourist countries give priority to the development of maritime and air transportation based on own actual conditions. The United Kingdom issued the Maritime Strategy 2050, which is aimed at deploying and applying unmanned navigation systems, AI, robots, sensors and other technologies in the shipping industry within 15-30 years, and playing a leading role in the formulation of the international unmanned ship regulatory framework. The French government has pledged to invest EUR 1.5 billion annually in the next five years to advance the R&D progress in the aviation industry.

The education system is transmitting an indispensable professional team for the tourism industry. As of 2020, about 1,032 universities as well as vocational and technical colleges in China have opened tourism majors, mainly including the following 10 categories: tourism management, hotel management, foreign tourism, and historical and cultural tourism. They are committed to training senior management talents and professional technical talents. The Japan National Tourism Organization (JNTO) launched a brand-new e-learning platform for travel agencies. By providing a complete set of online trainings and participation tools, this platform helps to ensure that learners acquire and retain knowledge in a "happy, participatory and more effective way". This training course allows users to explore and learn about Japanese food,

lifestyles, traditions, sceneries, and sightseeing scenic spots, and view future cities of Japan.

Financial support, visa optimization, travel subsidies and other policy supports are taking effect. Since the outbreak began on a global scale, the governments of various countries have implemented multiple measures to support the tourism industry severely hit by the epidemic. **Provide financial support:** In May 2020, the French government implemented an assistance plan totaling EUR 18 billion to support the tourism industry hit hard by COVID-19, including direct public investment of EUR 1.3 billion, government-guaranteed loans to tourism enterprises, and extension of the "Solidarity Fund"; the Italian government approved an economic stimulus package of EUR 55 billion in May, of which EUR 4 billion will be used for stimulating tourism development, and EUR 1 billion for cultural industries. Under this financial support, a large number of taxes, rent and loan reduction and exemption measures will be released to power the recovery of hotels, restaurants, travel agencies, theaters and movies. Relax restrictions on tourist visa: In September 2020, the Thai government implemented a special tourist visa mode to receive foreign tourists. In this mode, the visa is for 90 days and can be extended twice for a total of 270 days; from October 19, Singapore officially resumed the travel visa application that had been suspended for nearly half a year, and implemented special travel arrangements with Australia, Brunei, China, Japan, Malaysia, New Zealand, South Korea, Vietnam and other countries/regions on the premise of safeguarding public health. Issue travel allowances and vouchers: In September 2020, the Tokyo Metropolitan Government (TMG) announced a cooperation plan with the "Go To Travel" shopping support project of the Japanese government. According to the plan, the residents in Tokyo can receive a subsidy of JPY 5,000 per night for local stay and sightseeing, and a subsidy of JPY 2,500 for a one-day round-trip tour; the Romanian government issued the travel vouchers of USD 353 to employees; Australia issued the travel vouchers for tourists to spend only one dollar to stay in some hotels for one night.

4. A New Pattern of International Cooperation is Taking Shape

As the industry hit hardest by the epidemic, the tourism industry has a cascading effect on other industries. Taking Europe as an example, the disappearance of every job in the tourism industry corresponds to the loss of 2 to 3.5 jobs throughout the economy. Governments are increasingly aware of the important role played by tourism in the entire economy. Since the outbreak, the tourism sector around the world as well as the governments, industry and society have been working together for the prosperity and revitalization of the tourism industry. The global tourism industry is uniting as one in an unprecedented manner. Many representative meetings including the World Conference on Tourism Cooperation and Development organized by the China International Fair for Trade Services, the 2021-2022 Tourism Cooperation Joint Action Plan reached among the member states of the SCO, and the G20 Tourism Ministers Meeting were convoked to discuss joint responses to the epidemic and provide strong support for the

development of the tourism industry. The United Nations World Tourism Organization unveiled a targeted action guideline in April to facilitate the reopening of the global tourism industry in a safe, seamless and responsible manner. The World Travel and Tourism Council signed a Safe Travel Agreement with large tourism companies, the Airports Council International, the Cruise Lines International Association, the International Air Transport Association and other organizations, and submitted the specific plans for the restart of international travel to the G20 Tourism Ministers Meeting. The Asia-Pacific Tourism Association announced to launch a crisis resource center and a barometer of tourism recovery. The World Tourism Alliance released a collection of 100 cases of poverty alleviation through tourism, which provided smart solutions to the world's tourism poverty alleviation. The World Tourism Cities Federation joined hands with 10 international organizations and top tourism exhibitions to organize the World Conference on Tourism Cooperation and Development, and support the recovery of global urban tourism industries through strategy and trend analysis.

Governments around the world have adopted common and reciprocal measures to maintain the bottom line of the tourism industry and boost its development. Through close international cooperation between governments and enterprises, the ability of the tourism industry to cope with major international public security events has been fully improved. The significant role played by governments in epidemic prevention and control is far greater than that in previous international public crises. To help enterprises survive and prevent the employment rate from dropping, local governments are implementing effective interventions (tax cuts, subsidies, deferred tax payment, etc.). When the epidemic gets worse, the governments will also implement strict travel restrictions and require some enterprises to suspend business. Some airlines and airports have become state-controlled in this period. This crisis has increased solidarity among various regions and countries in the world. Taking the European Union as an example, on May 18, 2020, France and Germany jointly initiated an initiative calling for European countries to jointly curb the virus spread, and proposed to establish a European recovery fund for cooperation and growth. In addition to carrying out medical cooperation, they also helped tourists stranded outside Europe to return home smoothly, and allowed for necessary personnel flows between EU countries.

Looking back, the development of tourism has been accompanied by crisis, but it can always recover after a setback. Every successful response is an accumulation of experience, which in turn drives growth of the tourism industry. The tourism revenues and the number of tourists temporarily reduced due to Covid-19 are gradually recovering with effective control of the epidemic. In response to Covid-19, all stakeholders in the tourism industry had to make changes in the new context. Besides, such changes are irreversible. We should rise up to new transformations and challenges with a brand-new mindset.

III. What is Coming Soon: Market Changes and Industry Restructuring

1. Growing Demands and Changing Market

People's yearning for a better travel life and cultural leisure will become more prominent in the future. The tourism demands are only temporarily suppressed, but never disappear. One point we should notice is that people's travel demands are changing. Considering own safety, people are selecting individual tours instead of group tours, and preferring personalized customized tours and self-driving tours than standardized tourism products. A special survey conducted by China Tourism Academy (Data Center of the Ministry of Culture and Tourism) among urban and rural residents shows that, the majority of respondents said that the epidemic "may rebound, but it's generally controllable", while a small number of respondents worried that "the situation is not yet under full control and is still tense". In terms of "attitudes and views on tourism after the epidemic", 71.5% of the respondents said they would travel after the epidemic is over and no cases have been confirmed for a long time, 20.7% said they would travel immediately after the epidemic was over, and 7.8% said they were less willing or indifferent to travel. A growing number of people are confident that: The epidemic will eventually disappear, and the cancelled travel plan will take place at better times.

General Secretary Xi proposed instructions during his visit to Yungang Grottoes in Datong City, "The development of tourism must be based on protection and avoid excessive commercialization. It shall be a process for people to perceive Chinese culture and enhance cultural confidence. " In the past, we travelled for "enjoying beautiful natural sceneries of mountains and rivers". Today, in addition to enjoying "beautiful sceneries", we also want to feel the "beautiful daily life" and deepen our "feelings for our country" in this process. This year, Russia postponed all mass activities to celebrate the anniversary of the victory in World War II, including military parade in Red Square. Some activities were organized online, with nearly 3 million people participating in the "Virtual parade". The photos of veterans sent by the public to organizers were displayed on the website. During National Day and Mid-Autumn Festival holidays in China, the tours without shopping, high-star hotels, exclusive tour guides, exquisite small group tours, etc. became the tourism keywords. The customized tourism developed rapidly, showing a rapid growth momentum. According to the data from Tripadvisor, after the epidemic, tourists are changing both psychologically and behaviorally. For example, they will pay more attention to environmental hygiene, and be more willing to take a self-driving tour and go outdoors with good folklore and environment. The 1-meter social distancing makes some

outdoor activities and natural scenic spots more favored, such as hiking and leisure activities at beach. (See Figure 7). According to the data on Mafengwo.cn, the orders for customized tours rose significantly during the festival, a YoY increase of 24%. Many Chinese tourists visited Inner Mongolia, Yunnan and western Provinces by self-driving for long trips.

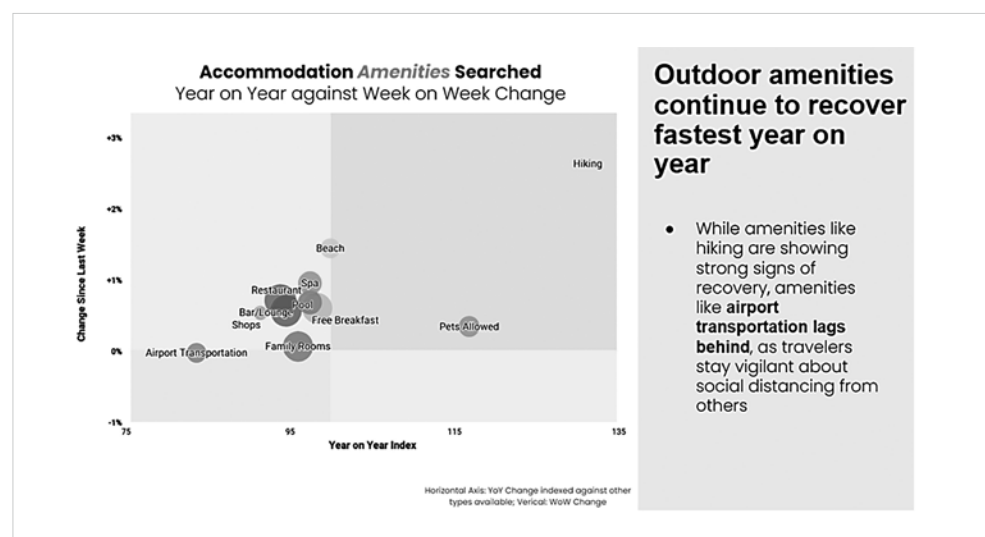


Figure 7: Tourist Search Hot Words on Tripadvisor Website

2. Innovation in Business Model and Restructuring of Industrial Pattern

In response to the COVID-19 outbreak, the tourism industry has to enter transformation and upgrading. For example, the forms of wine making experience, museum visits, sports events, indoor dining and entertainment, etc., should be redesigned to serve smaller tourism groups. More outdoor activities and individual experience should be provided and the requirements of strict social distancing should be followed. To meet new standards, tourism enterprises have upgraded their cleaning procedures and provided relevant trainings for their employees. Tourism practitioners can also make preliminary judgments on suspected cases during travel, keep the tourism group in harmony and order, and supervise the interaction of tourists to contain group transmission. Contactless services are provided in restaurants, hotels, airports and public space. Tourists can perform the operations of hotel check-in, check-out, door opening, mobile payment, reservations, etc. through mobile apps, including self-service enquiry service machines, in-house entertainment facilities and online shopping of destinations, robots (reception, meal delivery, tour guides in museums, etc.), entertainment and shopping pushed by artificial intelligence websites, online chat services, digital payments (e-wallets and e-credit cards), etc. Moreover, public places such as movie theaters, airports, shopping malls, museums, restaurants and hotels need to protect the safety of the audience more effectively through new

technologies and methods, and increase disinfection facilities and disinfectants. The robots are used more widely to replace some routine jobs. This sets higher requirements for the cultural quality of tourism practitioners. The problem of excessive tourism will be alleviated, and the quality of tourism will be improved with the popularization of booking tours.

Although a part of tourism enterprises closed down due to epidemic pressure, many tourism enterprises survived this crisis, and there are also new start-ups in the tourism sector. The tourism industry experiencing double baptism of the epidemic and market, will inevitably usher in the restructuring of its industrial pattern. Traditional industries need to seek modernization development, and large industries need to continuously enhance own strength. Hoshino Resorts TOMAMU, a Japanese hotel group, announced on October 13, as the global economy is recovering from the epidemic and tourism demands are surging, it will develop hotel business in China in the spring of 2021 and open a hotel resort in east Zhejiang. In October 2020, Air Canada has reached a deal with Transat A.T. Inc., an international travel operator, to acquire all issued and outstanding shares of Transat and merge it into Air Canada.

3. A Brand-New World Tourism Development System

The world economy and international tourism will enter a steady recovery stage after the epidemic. Covid-19 is now causing high human losses around the world and serious impacts on economic activity. According to the World Bank's projections in October 2020, the global economy may be cut by 4.4% in 2020, but China's growth is forecast at 1.9%. China is the only country without negative growth among the major economies, and referred to as "one branch alone" by the United Nations in relevant coverage. The baseline scenario assumes, as the epidemic subsides in H2 2020, the prevention and control measures can be phased out. In this scenario, various countries will introduce policy support measures to help economic activities return to normal, and the global economy is expected to grow by 5.4% on a QoQ basis in 2021 (see Table 2). According to the estimates of Oxford Economics, the global tourism industry is expected to return to normal by 2023. As practical results have been made in global epidemic control and the resumption of work and production, an increasing number of countries and regions have adopted a more open attitude towards opening up cross-border tourism. In this context, the global tourism industry will also recover steadily in next 2-3 years. International organizations have advocated to resume international tourism activities in various forms, promising to jointly promote the recovery of international tourism. In summary, no force can hinder the communications and exchanges between people, neither the epidemic, nor other factors. The fundamentals of sustained growth in international tourism will continue.

Table 2: Economic Conditions and Forecasts of Major Regions and Countries in the World

| Regions and Countries | Growth rate in 2019 (%) | GDP in 2020 Growth rate (%) | GDP in 2021 Growth rate (%) |
|-------------------------------------------|-------------------------|-----------------------------|-----------------------------|
| World Output | 2.8 | -4.4 | 5.2 |
| Eurozone | 1.3 | -8.3 | 5.2 |
| Emerging and Developing Economies in Asia | 5.5 | -1.7 | 8.0 |
| Five ASEAN Countries | 4.9 | -3.4 | 6.2 |
| Latin America and the Caribbean | 0.0 | -8.1 | 3.6 |
| U.S. | 2.2 | -4.3 | 3.1 |
| Germany | 0.6 | -6.0 | 4.2 |
| France | 1.5 | -9.8 | 6.0 |
| Italy | 0.3 | -10.6 | 5.2 |
| Spain | 2.0 | -12.8 | 7.2 |
| Japan | 0.7 | -5.3 | 2.3 |
| U.K. | 1.5 | -9.8 | 5.9 |
| Canada | 1.7 | -7.1 | 5.2 |
| China | 6.1 | 1.9 | 8.2 |
| India | 4.2 | -10.3 | 8.8 |

Notes: The data are from the International Monetary Fund (IMF)

A community of sustainable tourism development is taking shape. Going forward, the tourism industry will change its previous look of high market-orientation and domination by private enterprises, providing room for multilateral international organizations, governments, institutions and other public sectors in the tourism industry to play a greater role. We will usher in a brand new, ecological, and sustainable world tourism development system, which is also a cooperation development system led by new ideas and shared by all countries. This system is a result of common efforts of the public sector, private sector and social forces, and a community formed to protect people's tourism rights and drive sustainable development of the industry. The community will bring the entire world together to solve the challenges faced by us in terms of security, public health, environmental issues, technical research and development, etc. In recent years, WTA has carried out a series of practices and international exchange activities centered on the analysis of poverty alleviation cases through tourism, theoretical research, experience publicity, etc., greatly advancing the global progress, industrial implantation and document construction concerning poverty alleviation through tourism. As the epidemic prevention and control gradually becomes normal, it's necessary to exert the important role of WTO, WHO,

UNWTO, WTA and other international organizations in the development of world tourism. Governments at all levels in various countries should allocate more talents, funds, technologies and other industrial elements required for promoting the development of the tourism industry. It's necessary to put more emphasis on international cooperation between travel agencies, OTAs, hotels, scenic spots, railway companies, car rental companies and other market entities, explore an international tourism cooperation model of "guiding market openness with travel demands, promoting the improvement of infrastructure and public service systems with tourism investment, and the sharing of modern business environments between the tourists and communities", and propel the institutionalized growth of new drivers for international tourism strategic partnerships.

IV. Policy and Action: Stay Confident and Work towards the Same Goal of Building a Community of Shared Future for World Tourism

Maintain confidence in development and speed up the building of a new pattern of tourism development featuring mutual support at home and abroad. Given that we are still unclear about how the global epidemic will evolve and the epidemic has not been effectively controlled, it's an urgent need to unlock strong domestic and foreign tourism market demands. We should actively develop domestic tourism, make plans for inbound tourism as soon as possible, and do a good job in promoting full resumption of work and production as well as the tourism recovery of various regions on the premise of effective epidemic prevention and control. We should learn from rapid tourism recovery in China, guide the consumption trends of short-distance tourism such as surrounding tourism, village tourism, and self-driving tourism in a rational way and continue to consolidate the foundation of the tourism markets of various countries, so that the tourism can be deeply embedded in the daily life of people, instead of being far from people's life and the economic and social development system.

Adapt to the changing needs, and lead high-quality development of the tourism industry by making good use of science and technology, cultural creativity and artistic fashion. The development of tourism has been accompanied by crisis, but it can always recover after a setback. Post-epidemic rejuvenation of the tourism market is not about simply returning to the past, but about taking the initiative to make future plans. At present, new technologies such as 5G, artificial intelligence, big data, unmanned driving, machine translation and contactless services have fundamentally subverted the traditional way of tourism consumption, followed by the traditional way of tourism services. We should fully stimulate the enthusiasm of market players, take into account the technology application scenarios and business incubation possibilities of market demands, and make strategic and technical reserves for the tourism industry to do a good job in epidemic control and cope with mid- to long-term crises through the empowerment of science and technology, cultural creativity, and artistic fashion and the basic work of personnel training, product development and business development.

Summarize experience, sort out achievements and consolidate the foundation for mutual trust in multilateral tourism cooperation. Faced with changes and an epidemic unseen in a century, we should still stick closely to the theme of the times: peace and development. We should pay dual attention to the two main lines of epidemic control and economic recovery, and summarize the experience and achievements of various countries in responding to COVID-19 and promoting

post-epidemic revitalization of tourism. We should establish tourism information cooperation and sharing mechanisms between governments, industries and related institutions in various countries/regions, and conduct in-depth and extensive experience exchanges and win-win cooperation in policy and trend research, data support and information release, explore the experience of international tourism cooperation in hedging the epidemic impacts and reviving the economy, and further deepen international tourism cooperation in the fight against COVID-19, with a focus on tourism cooperation among countries along the "Belt and Road" initiative.

Build consensus on development and provide ideological guidance and policy support for prosperity and revitalization of the global tourism industry. Since the outbreak, the tourism sector around the world as well as the governments, industry and society have been working together for the prosperity and revitalization of the tourism industry. In such a more difficult period, the important role of tourism is greatly highlighted. Countries represented by China have gradually established a set of effective supporting systems from practicing the concept of tourism business community, tourism administration community and tourism academic community in response to the major public health event COVID-19. We should further call on governments, and especially the departments of tourism, civil aviation, security inspection, immigration, border control ports, epidemic prevention, etc., to enhance their support for the tourism industry and market players, elaborate advanced ideas, concepts and wisdom of tourism development, including but not limited to those of China, and build the consensus on future development of the international tourism through concept innovation and thought guidance.

Facilitate free people-to-people exchanges and promote inclusive and sustainable development of the global tourism industry. Tourism is regarded as a peaceful and ecological industry, as well as an important force for promoting world peace and development. In the context of normal epidemic prevention and control, what is needed more is a global perspective. At present, tourists are willing to, enterprises are motivated to, communities have built up the consensus to, and governments have the aspirations to cooperate with each other. We hope that the countries around the world can eliminate travel barriers as many as possible in the spirit of openness, innovation, mutual benefit and win-win result, and deepen tourism cooperation in various forms and at different levels on the premise of ensuring safety, so as to create a freer, more convenient, safer and more comfortable travel environment. We should further improve the satisfaction and sense of gain among tourists, corporate employees and community residents, and pay more attention to many key issues, including but not limited to environmental changes, protection of women and children, rights and interests of vulnerable groups and animal welfare. Through these efforts in addressing challenges, the tourism industry can be guided to a more prosperous and sustainable future.

Special Report: The Progress, Achievements and Influence of China's Response to COVID-19

1. The progress

(1) At the initial stage after the outbreak: Stop providing group tours, close scenic spots and enhance epidemic prevention and control.

In order to carry forward General Secretary Xi Jinping's important instructions of "putting people's life safety and health first", the Ministry of Culture and Tourism has, based on scientific research and judgment on the relationship between the epidemic and tourism, acted resolutely from the first day of the Spring Festival holiday and shift its work focus from "guaranteeing supply and prospering the market" to "stopping providing group tours, closing scenic spots and enhancing epidemic prevention and control". The tourist attractions, museums, cultural centers, theaters and other cultural and tourism venues were closed in time, and the performances, foreign visits, group tours of travel agencies, public gathering activities, and large-scale events in star hotels were suspended to effectively safeguard the lives of people. The monitoring data show that the organized tourism activities were reduced in response until all tourism activities were cancelled. The number of tourists visiting relatives and friends also decreased by more than 76% year-on-year, and the radius of destination activities continued to shrink to about 2 kilometers, cutting expected consumption by nearly 50%. The suspension of group tours has released a clear signal for the individual market, achieving effective transmission. Without these decisive measures, nearly 500 million tourists are expected to travel across China and the world before the Spring Festival, especially including millions of outbound tourists and tens of millions of domestic tour groups. Such a large number of mobile consumption and gathering activities makes it entirely possible to bring about unpredictable spread of the epidemic.

Thanks to the understanding, recognition and common efforts of the tourism front, 94.25% of the tourists during the Spring Festival expressed their understanding of the changes in itineraries and the extraordinary measures taken by the government and the industry to tackle this crisis. The China Tourism Academy (Data Center of the Ministry of Culture and Tourism) conducted a continuous investigation on tourists' mentality and behavior during the epidemic via China's tourism big data independent research platform. As the data show, the policies related to culture and tourism responded to the public needs and received absolute support. At the initial stage after the outbreak, most interviewees said they would take the

initiative to participate in less outdoor and venue activities such as temple fairs, garden tours, cinemas, museums, playgrounds, and Spring Festival gatherings. In addition to worrying about own safety and the worsening of the epidemic, the national sentiments that "avoid making trouble for our country" are also the main reason why most tourists cancel their trips. It's also found in the survey that most tourists held a positive and optimistic attitude about the epidemic response and post-epidemic trend of the tourism industry, and expected more complete epidemic response plans and more effective post-epidemic stimulus policies to be released. When asked their "attitudes and opinions on tourism after the epidemic", 71.5% of the respondents said they would travel after the epidemic is over and no cases have been confirmed for a long time, and 20.7% said they would travel immediately after the epidemic was over. The understanding and recognition of most tourists for government decision-making, especially the decisions on the tourism industry, laid a solid market foundation for a steady drop and effective basement of tourism consumption and during the Spring Festival, accumulating practical drivers for support during the epidemic and revitalization after the epidemic.

(2) At the medium and later stages after the outbreak: Accumulate confidence, support the industry, and promote orderly resumption of work.

As the macroeconomic policies issued by the development and reform, finance, commerce, culture and tourism departments, as well as the specific policies issued by local governments start to take effect, tourism enterprises have begun to buffer from the initial extreme pessimism and dark future. Their confidence has been restored, and a variety of self-help and mutual assistance actions in many forms have been carried out. In terms of the public opinions within the industry, more and more tourism groups, small and medium-sized enterprises and start-ups are no longer blindly anxious, and put all hope in the governments' assistance but start to assume common but differentiated responsibilities based on "self-help by enterprises, mutual assistance across the industry, and government support". The goal of industrial policies issued in response to the epidemic is to focus on the supply side, support the bottom line of converging the industry's strength, and avoid mass bankruptcy of tourism enterprises, large-scale unemployment of employees, and phenomenon-level negative public opinions across the industry. In particular, we should prevent undue gaps and avulsions between upstream and downstream enterprises in the industrial chain and related organizations of the ecosystem. The central government and departments of development and reform, industry and information technology, commerce, finance, and finance have successively introduced, and will continue to introduce a series of policies to stabilize employment, the market and expectations. The phased reduction and exemption of social insurance premiums on enterprises, and the policy allowing for deferred payment of housing provident funds by enterprises adopted at a State Council executive meeting makes market

entities have a full sense of gain.

Local governments at all levels have also strengthened their support for the industries hit hardest, from the aspects of tax reduction and exemption, incentives and subsidies, debt extensions, capital expenditure expansion and resumption of work and production. How the tourism administrative departments can coordinate major suppliers including overseas airlines and local reception resources within the framework of laws, regulations and industry practices, and guide enterprises to assume common and differentiated responsibilities, will become an important issue for improving the tourism governance system and the governance capabilities. We should consider both the particularity and generality of travel agencies, OTAs, hotels, homestays, scenic spots, and theme parks as tourism enterprises, and make full use of central and local preferential policies for supporting enterprises, especially small and medium-sized enterprises. The policy that tourism administrative departments temporarily return 80% of quality deposits to travel agencies has been implemented. We are now strengthening coordination with civil aviation, industry and information technology, development and reform, finance, commerce and other departments on how to address the concerns of tourism enterprises for the cash flow and other aspects, and carefully studying industrial policies and administrative measures with industry characteristics, which will be released in due course.

(3) Post-epidemic stage: Release demands, cultivate growth drivers, and promote high-quality development of the tourism industry in an all-round manner.

Is there a high satisfaction among tourists? Have the enterprises realized good benefits? Is there insufficient stamina for the tourism industry's development? Whether this epidemic breaks out or not, these three practical questions that are closely related to high-quality development of the tourism industry are questions that all the tourism system and the tourism front must answer well. If the tourists are not satisfied, the enterprises have no benefits and there is no stamina for industry development, the tourism industry will still decline, even without this epidemic. On the contrary, if most tourists are satisfied and willing to follow the industry development rhythm, and the employees have a sense of gain and are willing to work hard in enterprises, along with the support from the economic and social environment after the building of a moderately prosperous society in all respects, there will be no such setbacks that the tourism industry cannot tide over.

To realize high-quality development of the tourism industry, we should quit the traditional resource-driven development model, but actively cultivate new growth drivers such as technology, education, and talents, and seek benefits from R&D and innovation. We should strengthen the construction of tourism infrastructure and the provision of public services, and

release new consumer demands including but not limited to summer tourism, ice and snow tourism, night tourism, parent-child tourism, tasty food tourism, research tourism, and self-driving tourism. On the other hand, we should unswervingly uphold the mission of developing inbound tourism, and promote the national tourism image from tradition to modernity by taking the opportunity of reorganizing the national tourism promotion organization and using visa facilitation as a breakthrough point. We should further clarify the work focus of outbound tourism, and focus on key areas such as tourism safety, civilized tourism and international cooperation. Epidemic prevention and control work are progressed by stages. To complete the annual goals and tasks, we must return to the goals of the 13th Five-Year Plan and the start of the 14th Five-Year Plan, as well as the strategic goal of building a tourism power. The response to this epidemic reflects that the public governance capabilities in the tourism sector, especially the reserve and use of tools for early warning, intervention, coordination, guidance and feedback really need to be greatly improved. It's one of the important tasks for post-epidemic revitalization of the cultural and tourism system and tourism development to explore the comprehensive law enforcement mechanism in the new era, and effectively improve the governance system and enhance governance capabilities through innovative inclusive supervision and fault tolerance promotion systems.

2. Achievements of China's Response to COVID-19

Affected by COVID-19, the tourism market has experienced three stages of full stagnation of organized tourism activities, overall planning for epidemic prevention & control and orderly resumption of work, and all-round resumption of domestic tourism in the context of normal epidemic prevention and control. At present, a pattern based on the domestic tourism market and featuring the cycle of domestic tourism economy as well as the double cycle of domestic and international tourism economy is taking shape. New digital technologies and new infrastructure industrial policies have laid a foundation for the formation of new growth drivers for the supply-side reform in China's tourism economy.

(1) Tourism demands have steadily recovered from the bottom, and the trend of short-range and independent tourism consumption gets obvious.

In Q1, the organized tourism activities basically stagnated, and the work focus of the cultural and tourism system and the tourism front was shifted from "guaranteeing supply and prospering the market" to "stopping providing group tours, closing scenic spots and enhancing epidemic prevention and control". On March 12, the Ministry of Culture and Tourism issued a notice to gradually resume in-province, surrounding, and local tourism activities across China, with the focus of the cultural and tourism system adjusted to "coordinating epidemic prevention and control and promoting orderly resumption of work and production". The tourism market began to recover steadily. In Q3, especially after the

resumption of inter-provincial tourism activities on July 14, China's tourism industry has entered a new stage of comprehensive resumption of work, production and business in the context of epidemic prevention and control, which stabilized the tourism economy and promoted its growth throughout the year. In the first three quarters, non-group tourism markets such as independent tours, family tours, and self-driving tours had been provided. With the characteristics of short-range and independent travel getting more obvious, people begun to appreciate the beautiful scenery around them and experience the beauty of daily life.

In H1, the number of domestic tourists and income are expected to recover by about 30% and 23%, respectively. The per capita travel expenditure is expected to reach 75% of that during the same period last year. The tourism satisfaction is 80.07 and 81.31, respectively. The industry is operating at a high level and has grown both on YoY and QoQ bases, indicating that epidemic prevention and control has not had a negative impact on the travel experience, and the time-sharing appointments and control of carrying capacity during the epidemic is conducive to improving tourist satisfaction. Judging from the data during the Qingming Festival, Labor Day and Dragon Boat Festival holidays, the total number of domestic tourists in China has recovered by 38.6%, 53.5%, 50.9%, respectively, while the tourism income recovered by 19.3%, 36.7%, 31.2%, respectively. The recovery of tourism income lags behind the number of tourists by 20%. As of August 12, a total of 93 domestic and foreign airlines (19 domestic and 74 foreign airlines) had been operating 187 regular international passenger routes, performing 210 round-trip flights a week, and provided scheduled passenger services with 50 countries, showing a more obvious sign of recovery.

After the policy to reopen inter-provincial tourism activities came into force on July 14, the cultural and tourism consumption quickly rose, driven by travels in summer. From July to August, the total number of passengers travelling through national railways reached 456 million, 70% of the level during the same period last year. In August, the domestic air passenger transport market received a total of 45.351 million passengers, recovering to 85% of the level during the same period last year and reaching the highest monthly domestic passenger transport scale this year. Data from Qunar.com show that the number of air ticket bookings in Shanghai, Chengdu and Guangzhou during the summer vacation have exceeded the same period last year. The recovery of the car rental market after the epidemic is gratifying, with short-term personal rentals, car rentals for self-driving tours and other areas developing rapidly. A large number of new users have entered the car rental market, accounting for 45% of the total users in the industry. The industry's overall scale has exceeded that of the same period last year, expected to exceed the RMB 100 billion by late 2020. The passenger volumes of small traffic in destinations such as urban buses, subways, online car-hailing, public urban buses, subways, online car-hailing and public bicycles have also been fully recovered.

(2) Enterprises' confidence in development is fully restored and stabilized. Short-range, customized and self-driving tours have become the focus of innovation.

To mitigate the impact of the epidemic on cash flow, some enterprises have to divest their assets and reduce its size, while the enterprises with sufficient cash flow have begun to carry out cross-border integration. For example, JD Digits participated in the strategic financing of Traveloka, the largest OTA start-up in Southeast Asia, with an investment of USD 250 million; Trip and Sunac Culture & Tourism Group reached an online and offline strategic cooperation agreement; Ocean Holdings Group in Qingdao West Coast New Area made a strategic investment in TravelGo Financial Services; Meituan made a comprehensive deployment for the cultural and tourism sector; Zhejiang Tourism Investment Group integrated the assets of Zhejiang Tourism Group and Zheqin Group; Shandong Province-owned enterprises restructured and integrated the cultural, tourism, healthcare and health assets; more than 4,000 companies are newly registered in Hainan Province, driven by the favorable policies. According to a special survey by the China Tourism Academy: Although hit hard by the epidemic, more than 95% of respondents said they would not divert from the travel service industry.

In view of the law of consumer confidence recovery and the requirements for epidemic prevention and control, leisure and vacation tours in surrounding urban areas, inter-regional tours in the province, self-driving tours and customized tours become the focus of both the market demands and business innovation. According to the calculations of China Tourism Academy, in the first 8 months, the number of tourists participating in rural, urban, surrounding, and self-driving tours has recovered to more than 65% year-on-year. More tourists in Chongqing, Shanghai, Chengdu, Xi'an, Beijing, Guangzhou, Wuhan, Shenzhen and other cities chose short-distance tours. Data from Trip, Qunar and other platforms show that, the individual tourist market including self-driving, self-service, and independent travels during summer vacations has recovered to about 90%. The high-quality and low-density tourism products that provide in-depth experience are scheduled to recover quickly, accounting for about 70%; the number of hotel bookings recovered to 80% of the level last year, and the number of bookings for hotels rated as multiple stars rose YoY; natural scenic spots and western destinations have become popular destinations, and the tours around the Yangtze River Delta and the Pearl River Delta have become the choice of many tourists.

(3) Market players have taken multiple measures, digitalization and new infrastructure have laid a foundation for the formation of new growth drivers for the industry.

In the first three quarters, digitalization has effectively stimulated rapid growth of new consumption types such as online games, online reading, MuseumOnline and cloud tourism, as well as corresponding business format innovations. This fully demonstrates

that new technologies represented by “digitization” and new policies represented by “new infrastructure” have laid a foundation for the formation of new growth drivers for the supply-side reform in China’s tourism economy. Currently, normal epidemic prevention and control, real-name appointments and other requirements have objectively speeded up the application of smart tourism before, during the travel and post-travel evaluation links. Many technological innovations such as scanning codes to enter the park, access by scanning faces, contactless services, and food delivery by robots have entered the consumption scenarios. According to the survey data, the proportion of tourists who made appointments to visit scenic spots during the Labor Day holiday reached 77.4%, of which 74.1% rated the appointment services as “excellent experience”. Recently, Shanghai Municipal Administration of Culture and Tourism has released the Action Plan of Shanghai Municipality for the Development of Online New Cultural Tourism (2020-2022), proposing to rely on new digital technologies to boost innovations in cultural tourism business formats, services, and management. Hangzhou has released the Ten Scenes of Hangzhou Digital Economy Tourism. The tourism industry has become an effective carrier to vividly interpret the achievements of Hangzhou’s development as “the first city of digital economy”.

To echo the “new infrastructure” policy issued by the central government, the construction of new infrastructure such as 5G networks and data centers has been accelerated. Along with the policies of simplifying project approval procedures, strengthening financial support, encouraging the issuance of local bonds, decentralizing land approval authority, reducing taxes and fees, and relaxing energy consumption, more investment institutions and market players from other areas will enter the tourism industry after the epidemic. Since April, many major cultural and tourism projects in Zhejiang, Henan and Guangxi have started in succession. Some of these projects involve an investment of tens of billions. We are accelerating the deployment of industrial integration and technological innovation projects in the fields of healthcare, research, business travel, night tours, ice and snow, amusement parks, smart tourism, etc. For example, the Zhangjiajie Robot Happy City project started, and Xinmi Evergrande Cultural Tourism and Healthcare city project was signed, Coca Cola created a can immersive experience museum, and Airbnb, a homestay representative enterprise resumed the listing process.

(4) The tourism administrative departments have achieved remarkable results in coordinating epidemic prevention and control work, and promoting the resumption of work and production.

To win this fight, the culture and tourism system has resolutely carried forward the spirit of General Secretary Xi Jinping’s important instructions, and strictly implemented the work arrangements of the central government in time and in detail at each stage, while sticking to

the principle of always putting people’s life safety and health first. Thanks to these appropriate measures, practical results have been delivered, winning the recognition of the masses. In Q1, supported by the policies of temporary return of 80% quality deposits to travel agencies by tourism administrative departments, resumption of provincial tourism business, and opening appointment of scenic spots, tourism companies have gradually stabilized their minds and carried out various forms of self-help activities to survive this dark moment together. Since Q2, with the introduction of macro policies issued by the development and reform, fiscal, finance, commerce and other comprehensive departments and the bailout policies issued by local governments, as well as the recovery of the demands for business travel, visiting relatives and friends, leisure and vacation, tourist attractions, theme parks (in particular, the first recovery of urban parks, country parks and outdoor recreational theme parks), there are obvious signs indicating that urban tourism and village tourism markets drive the recovery of business hotels and guest houses around big cities. In Q3, with the resumption of cross-provincial tourism activities and the advent of summer vacation, the Ministry of Culture and Tourism issued the Guidelines for Epidemic Prevention and Control Measures for the Scenic Spots Reopened, increasing the maximum carrying capacity of scenic spots to 75% and continuing to promote the resumption of work and production. Local governments are also actively taking various measures to promote recovery. For example, the Chongqing Municipal Government issued the Opinions on Accelerating Night Economic Development and Promoting Consumption Growth; the cultural and tourism departments of Shanxi, Hebei, Heilongjiang and other provinces held the cultural and tourism development conferences to actively release strong confidence in resuming work and production under normal epidemic prevention and control.

(5) The tourism industry is moving from the bottom to full recovery in 2020.

Over the eight-day National Day and Mid-Autumn Festival holiday in China, the culture and tourism system has resolutely carried forward the spirit of General Secretary Xi Jinping’s important instructions, and strictly implemented the work requirements of the central government for overall epidemic prevention and control as well as the resumption of work, production and business in detail, strictly followed the guiding spirit of the central government in production safety, and clarified the territorial responsibility, supervisory responsibility and subject responsibility at all levels. Travel agencies and other tourism enterprises have followed the management requirements of “booking, staggering peak and flow restriction”, which contributed to building a “safe, orderly, prosperous and civilized” tourism market. We can draw conclusions from official data about the year-on-year comparison of receiving tourists and tourism income on a comparable basis between this year’s National Day and Mid-Autumn Festival holiday and last year’s National Day holiday or a QoQ comparison of the recovery degree between this year’s National Day and Mid-Autumn Festival holiday and the Labor Day and Dragon Boat Festival holiday: Relying on domestic super markets, China’s

tourism economy has entered a new stage of comprehensive resumption of work, production and business under the normal epidemic prevention and control, the tourism consumption confidence has been fully restored, and tourism development potential has been fully released. Given the macroeconomic and epidemic prevention and control situation as well as the performance of the tourism market during the National Day and Mid-Autumn Festival holiday, we maintain optimistic expectations for the recovery of the tourism market and the industrial revitalization in Q4. According to the expectations, there is a high probability that the annual tourism economy will show a U-shaped recovery and revitalization development trend. The recovery of inbound and outbound tourism markets depends on international epidemic control, visa restrictions, aviation opening and other conditions. It is expected that they will be subject to adjustments at the bottom in the fourth quarter. Some countries and regions will gradually resume international routes and relieve the travel ban on China. The inbound and outbound tourism markets are expected to enter a gradual recovery stage this winter and next spring based on the epidemic prevention and control situation in various countries.

3. Impacts of COVID-19 on Major Tourism Industries in China

Building a good life beyond the landscape is the direction for the recovery and revitalization of the scenic spots. As the epidemic prevention and control enters the “normalization” stage, the tourist attractions are returning to people’s daily life with a new look. In general, compared with light-asset and low-debt travel agencies as well as heavy-asset and high-debt hotels and homestays, although heavy-asset and light-debt scenic spots are also hit hard by the epidemic, most scenic spots will not go bankrupt. With the sinking of the tourism market and upgrading of tourism consumption, tourists’ demands for scenic spots are no longer limited to beautiful sceneries, but a good life beyond the landscape, as well as warm memories and feelings for daily life. With the rapid expansion of urbanization and the development of high-speed transportation networks, the scenic spots previously in a distant location have become daily leisure places of urban and rural residents. The theme parks, playgrounds, historical and cultural blocks, and cultural and museum units for local residents have also become the atypical scenic spot that attracts tourists from afar. It will usher in revolutionary changes in the definition, connotation and extension of the scenic spots. We should not only meet the public needs for enjoying beautiful sceneries and listening to historical stories, but also the needs of tourists to share their quality life; not only meet the needs of tourists at daytime, but also provide tourists with high-quality comprehensive experience in entertainment, catering and accommodation at night.

Diversified cross-boundary service subjects of travel agencies. The epidemic has posed huge challenges on travel service providers represented by travel agencies and OTAs. Travel service providers have carried out various forms of self-rescue activities, but the performances of

different market players vary, with some feeling panic, some keeping calm and some stepping up efforts in innovation and development. There are hidden opportunities behind the epidemic. Some travel agencies have started self-rescue and mutual assistance activities, and promoted resource integration. Many large enterprises have provided material and spiritual assistance to offline travel agencies. Material assistance measures include reducing or exempting part of the management fees to help enterprises survive as much as possible; mental assistance measures include developing online APP courses to train employees on business knowledge and skills, optimize the workforce and make up for shortcomings during this special “holiday”. Some enterprises have launched joint mutual assistance programs, and the internal part-time recruitment programs, effectively utilizing temporary redundant personnel. The epidemic has also expedited industry reshuffle and resource integration. Faced with black swan events, many travel agencies not only focus on addressing the current crisis, but on mining the opportunities behind the crisis. In the field of scale production and operation, some small and medium-sized travel agencies may gradually explore to carry out deeper and more sophisticated business in segments; while the other travel agencies seek to cooperate with large-scale brands to serve as their agents. Some stores have also carried out cross-border self-rescue activities, built social e-commerce platforms for daily life, and launched “e-commerce sales”, “cloud travel” and “live training” to increase their income through private domain traffic realization with the principle of not affecting the original business, not disturbing the original customer base and not reducing the original market volume. For example, Tong Cheng International Travel Service Co., Ltd. cooperated with a start-up Midian, during which the two sides complemented with each other, and recommended and sold online commodities, thus meeting users’ needs for “tourism + entertainment + social e-commerce”. U-Tour realized the transformation of “users + channels + resources” and effectively reduced risks by launching “tourism +” services.

Transform tourism accommodation from living in other places into community connection. During the epidemic, the tourism and accommodation industry represented by hotels and homestays, have consciously shouldered their social responsibilities to provide high-standard accommodation services for medical staff, staff and volunteers on the front line, quarantined tourists and community residents. China’s tourism and accommodation industry has some existing structural problems such as low salary, labor intensive, insufficient technological support and innovation vitality, and weak profitability. The epidemic has imposed greater challenges on post- epidemic recovery, revitalization, transformation and upgrading of the accommodation industry. As the tourism and accommodation industry has entered a new stage of “resumption of work with continued prevention and control measures”, accommodation enterprises are actively innovating accommodation products and service models, adjusting their business structure in time, and launching corporate-specific home quarantine rooms, quarantine offices, “worry-free guest rooms”, “assured

hotels” and other new products, as well as the health protection services including “assured consultation”, “free insurance” and “contactless service”, to help reduce losses as much as possible and restore consumers’ confidence in the market. Guided by the concept that the host and the guest share new space for a better life, the tourism accommodation has transformed from living in other places into the community connection, being jointly built with the community upon consultation and co-existing and sharing benefits with local business areas. To promote the high-quality development of tourism and accommodation industry, we should strengthen the application of technologies, focus on cultural creativity, and reconstruct the industrial chain and ecological circle. The tourism accommodation industries including hotels and homestays are also a community of shared future composed of multiple stakeholders. The tourism accommodation industry with a business pursuit of return on investment and fulfilling the social responsibilities through joint consultation and construction should deliver warm life experience and have the power to inspire people.

Research group of The Report on World Tourism Development 2020: Rebuilding the Confidence in Market Recovery & Embracing the Challenge of Industrial Transformation

General counsel:

Liu Shijun, Secretary-General of the World Tourism Alliance (WTA)

Dai Bin, President of China Tourism Academy

Members of the research group:

He Qiongfeng, Director of the Institute of Data Analysis, China Tourism Academy

Zhang Yuan, Director of the General Services Office of the World Tourism Alliance (WTA)

Li Changlin, Deputy Director of the General Services Offices of the World Tourism Alliance (WTA)

Liu Yanqiu, Project Official of the General Services Offices of the World Tourism Alliance (WTA)

Guo Yanjun, Project Official of the General Services Offices of the World Tourism Alliance (WTA)

Zeng Tian, Doctor of the Institute of Data Analysis, China Tourism Academy

Ding Zhaohan, Post Doctorate of China Tourism Academy

Hou Pingping, Post Doctorate of China Tourism Academy

Hu Yongjun, Doctor of the Institute of Data Analysis, China Tourism Academy

Zhang Jiayi, Assistant Research Fellow of the Institute of Data Analysis, China Tourism Academy

Li Huiyun, Assistant Research Fellow of the Institute of Data Analysis, China Tourism Academy



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