

2022 年世界旅游经济发展趋势解析



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世界旅游城市联合会每年年初都会发布《世界旅游经济趋势报告》，与全球同行分享联合会关于世界旅游经济发展趋势的看法和观点，为行业提供智慧支持和贡献力量。2022 年，联合会联合中国社会科学院旅游研究中心推出了我们第六份年度报告——《世界旅游经济趋势报告（2022）》。本报告从全球、区域、国别、城市、行业、企业等视角对全球旅游发展进行了全面总结与预测，不仅呈现了全球旅游经济的发展趋势、区域发展格局变化、重要国家突出特征，而且分析了旅游城市复苏战略、关键行业发展趋势和典型企业战略调整。我们期望借此报告，为各个旅游国家、旅游城市、旅游行业研判趋势、谋划未来、制定政策、调整策略提供有效帮助和智力支撑。

作为联合会的秘书长，我在此与大家分享联合会关于 2022 年世界旅游经济发展趋势的观点，为旅游业的未来发展提供一些预测和建议。

一、2021 年旅游产业处于缓慢复苏之中

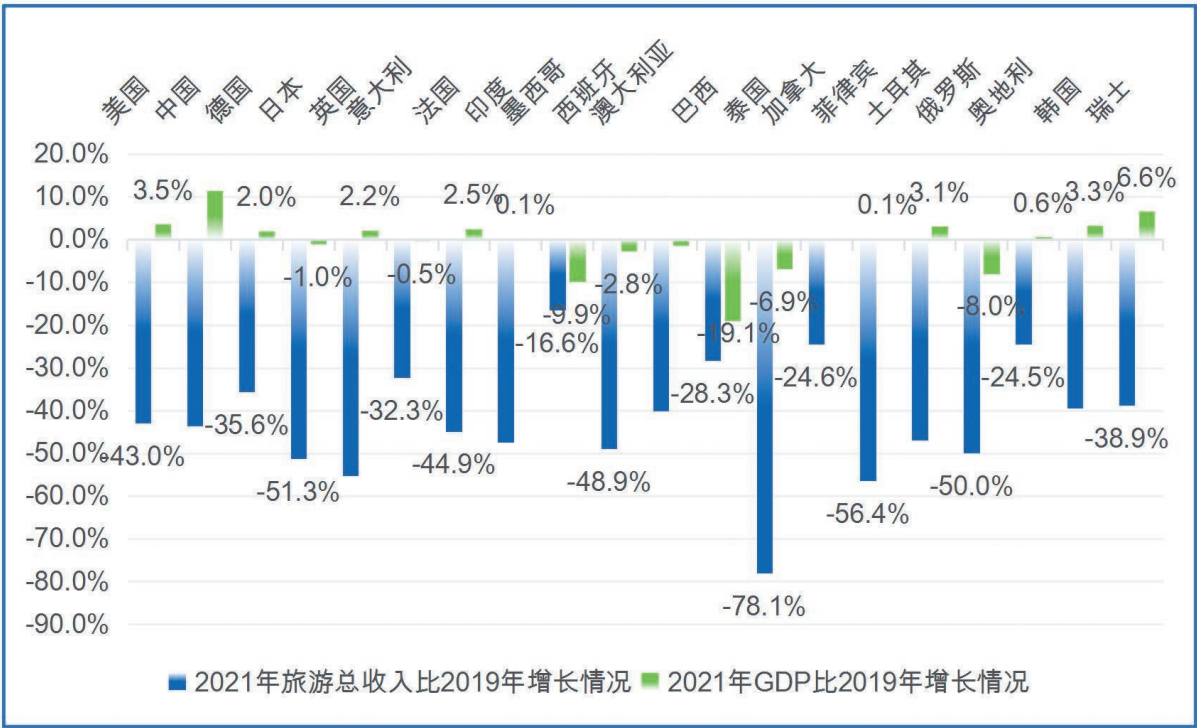
2021 年全球旅游总人次达到 66 亿人次，全球旅游总收入达到 3.3 万亿美元，分别恢复至 2019 年的 53.7% 和 55.9%。全球旅游总收入相当于 GDP 的比例回升至 3.8%，

与疫情前（2019 年）相比，下降了 3.1%。2021 年全球经济强劲复苏，经济增长达 5.7%，世界旅游经济复苏滞后于全球经济，但相较于 2020 年，仍取得了一定的发展。

2021 年，在疫情防控常态化背景下，各个细分行业的发展现状表现各不相同。在线旅游企业（OTA）行业整体势头较好，复苏也在逐步提速，亚太市场也受到更多的关注；在酒店业中，品牌酒店发展比较强势，一些新科技、新场景的应用比较亮眼；在主题公园中，巧妙运用虚实场景融合成为当前的一个热点趋势；在博物馆业中，展览的数字化升级、内容创新、开源创收成为发展重点；邮轮业尝试不断完善应急体系，对产品线路进行调整和创新；航空业复苏程度各不相同，服务质量和效率有所提高。

二、2022 年全球旅游经济将持续复苏

我们预测 2022 年全球旅游总人次将达到 84.5 亿人次，全球旅游总收入将达到 4 万亿美元，分别恢复到疫情前（2019 年）水平的 68.8% 和 67.8%。国际航空运输协会（IATA）预计 2022 年航空业收入客公里数将恢复到 2019 年 61%。因此，全球旅游总收入复苏情况好于全球航空业。2022 年，全球国际旅游人次将迎来一波增长小高潮，恢复至



2021 年 T20 国家旅游总收入与 GDP 相较于 2019 年的变化

2019 年水平的 43.6% 左右，国内旅游人次增速较 2021 年将有所放缓，预计恢复至 2019 年水平的 72%，但国内旅游总体比重仍高于国际旅游。

三、2022 年全球旅游业复苏的格局变化和重要趋势

新冠疫情的发展，深刻改变了世界人民的生活方式、社交状态、旅行偏好与行为。全球旅游市场的格局也发生了变化，出现了一些重要趋势。

世界旅游的格局变化有以下体现：一是旅游市场板块比重发生变化，过去，全球旅游经济主要以新兴经济体、亚太板块旅游经济增长为驱动，而未来，旅游业更将加依赖于城市，主要依托于城市间交换的旅游网络正在形成。二是旅游经济方面，发达国家和欠发达国家的差距变大，头部企业和中小企业的差异在加剧，轻资产企业和重资产企业间的分层也在产生。三是旅游产业集中度更高。旅游偏好将会更加集中到公共医疗水平高的国家，旅游市场向国内和周边集中，产业资源向城市集中，旅游行为向近程集中，产业链的掌控力向旅游平台集中。四是旅游产业的复苏带来持续的技术、认知和可持续变革，更加安全、便捷、可持续的旅游已由疫

情前的可选项变为必选项。

这些变化之中有两个重点趋势更值得关注：一是未来旅游业会更加重视城市之间的合作。世界上 80% 的旅游都是发生在城市，各个城市应该加强合作，积极推动有序的人员往来，推动旅游信息共享，分享旅游目的地、公共卫生、安全管理、旅游产品和服务等方面的信息，加强城市间的文化交流和合作。二是可持续旅游成为未来旅游的必选项。在疫情前很多城市已经开始着手绿色转型和包容性发展，而疫情对旅游业的冲击更加凸显当前旅游结构的脆弱性，凸显了未来城市可持续发展的重要性。在谋求可持续发展方面，需要城市鼓励和支持旅游企业投资绿色基础设施，比如节能住宿设施、可持续会议场所、绿色交通工具等、实施健全的环境管理机制，建立更加智慧、节能的交通体系，建立更加可靠的公共安全体系，等等。

虽然当前疫情仍存在反复，但我们仍然可以相信，2022 年全球旅游业将迎来强劲的复苏。作为世界首个以城市为主体的全球性国际旅游组织，世界旅游城市联合会将主动发挥引导作用，积极搭建世界旅游的多边合作服务平台，为世界城市旅游实现高质量发展，为全球旅游业实现蜕变、再创繁荣贡献力量。



An Analysis of World Tourism Economy Trends 2022

Early each year, WTCF issues the Report on World Tourism Economy Trends to share its views with tourism industries around the world and in hope of providing some insight into the industry. In 2022, WTCF and the Tourism Research Center of the Chinese Academy of Social Sciences jointly released our sixth annual report – *A Report on World Tourism Trends (2022)*. This report summarizes and predicts the growth of world tourism across the board from the perspectives of globe, region, country, city, industry and enterprise, demonstrating development trends of global tourism trajectory changes of various regions salient features of major countries, recovery strategies of tourist cities, growing trends of key sectors, and strategic adjustment of typical enterprises. We hope governments, cities and the tourist industry will find this

report helpful in assessing the current situation and preparing for the challenges and opportunities ahead, and laying down and rebalancing strategies.

As Secretary General of WTCF, I'd like to share some views from the report and offer some predictions and suggestions.

1. Slow recovery in tourism in 2021

In 2021, global tourist arrivals stood at 6.6 billion, with US\$ 3.3 trillion in total revenue, returning to their 2019 levels at 53.7% and 55.9%, respectively. Tourism's proportion in global GDP climbed back to 3.8%, still down 3.1% compared with the pre-pandemic level (2019). The industry lagged behind global economy as a whole which grew by a vigorous 5.7% in 2021, but still gained some ground compared to 2020.

As pandemic prevention and control became routine in 2021, each industry segment varies in their performance. OTA is in a good shape overall and picking up speed, with Asia-Pacific markets garnering greater attention.

PHOTOGRAPH: VCG

Brand-name hotels lead the charge in the hotel industry, implementing new technology and setting. Theme parks were exploring the possibilities of skillfully combining virtual and real scenes. Museums aimed to profit from increased digitization and creative content. The cruise industry focused on improving emergency systems and adjusting the routes they offer. The aviation industry saw improvements in efficiency and quality of the service, but no full recovery yet.

2. Global tourism on the path to continuing recovery in 2022

We predict, global tourist arrivals is to reach 8.45 billion and total revenue to reach US\$ 4 trillion in 2022, amounting to 68.8% and 67.8% of pre-pandemic level (2019) respectively. Meanwhile, IATA expects global demand for airlines, measured in RPKs, to reach 61% of pre-pandemic level in 2022, hence tourism is set for a faster recovery than the aviation industry. Global international tourist arrivals are expected to experience a moderate boom, returning to 43.6% of pre-pandemic level. The growth rate of domestic tourist arrivals will slow down compared with that in 2021 and is expected to return to 72.0% of the level in 2019. It appears domestic travel will remain a bigger market than traveling abroad.

3. Pattern changes and key trends in global tourism 2022

COVID-19 profoundly changed the lifestyle, social interactions and travel preferences and behavior of people all over the world. In response, certain key trends have arisen in the global tourism market.

Some of the major changes in the world pattern are reflected in the following aspects. First, in the past, the growth of global tourism was mostly propelled by emerging economies and the Asia-Pacific region. In the future, tourism will be more reliant on cities, as a tourism network based on the exchange between

cities comes into being. Second, in terms of tourism economy, the gap is widening between developed and developing countries, between top corporations and smaller ones, between asset-light and asset-heavy businesses. Third, the industry is getting more concentrated as tourists prioritize destinations with better medical services, closer to home or within their own country. Resources are pulled towards cities, and travel platforms gain a more dominant role in the industrial chain. Fourth, revival of tourism will be accompanied by a sustainable revolution in technology and cognition. Safe, convenient and sustainable travel is now something all tourists expect, rather than being optional.

Two trends here are especially worth noting. First, cooperation between cities will be more valuable in tourism. 80% of global tourism takes place in cities. Cities should strengthen cooperation, actively and orderly facilitate travels, promote cultural exchanges, share information on travel destinations, public health, safety measures, specific products and markets, etc. Second, sustainable travel becomes the norm. Many cities had started to adopt green initiatives previous to the pandemic, but the negative impact has highlighted the fragility in tourism structure and the importance of a sustainable development of cities. Cities need to encourage businesses to invest in green infrastructures, such as energy-saving accommodations, vehicles and conference spaces, to put in place sound environmental mechanisms, smarter transportation systems and more reliable public safety practices, etc.

Although the pandemic lingers on, we are confident that the tourist industry is headed towards a strong recovery in 2022. As the first international tourism organization centered on cities, WTCF is proud to spearhead the construction of a multilateral platform, to help cities enhance their tourism sector and to contribute to the rebirth of global travel.