

《世界旅游经济趋势报告（2022）》解读

2022年3月，世界旅游城市联合会与中国社会科学院旅游研究中心在京联合发布了《世界旅游经济趋势报告》。该报告就有效应对新冠疫情挑战，持续推动世界旅游经济发展做出了预测。本刊采访了报告研究负责人及发布者宋瑞博士，就报告中读者关心的问题做逐一解答。

W 《世界旅游城市》杂志 S 宋瑞



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W 作为报告的研究者，您已经连续几年发布该报告，您觉得和前几年相比，《世界旅游经济趋势报告》有哪些不同之处？此外，我们还注意到其中有一句话：“《报告》围绕全球旅游经济结构性复苏这条主线，对疫情之下全球旅游复苏态势、区域旅游发展格局变化、T20国家旅游发展表现、重点城市旅游创新发展战略等问题进行了全面研究和总结。”这是否是此次报告的研究方向和侧重点？

S 《世界旅游经济趋势报告（2022）》是中国社会科学院旅游研究中心与世界旅游城市联合会连续第六年合作研究并共同发布的最新成果。在过去的六年时间里，我们一方面保持报告的主旨和框架不变，试图从全球、区域、国家、城市、行业、企业等不同层面为大家提供一份了解世界旅游发展

最新趋势的立体图景；另一方面也在不断探索新的主题和形式。与往年相比，今年报告最为突出的主题就是变革。我们试图从各个角度全面揭示全球旅游业在此次疫情中所经历的各种变革。我们分析了经济发展、国际贸易、国际投资、区域差异和疫情冲击等外部环境的动态变化以及由此给全球旅游带来的诸多挑战。在此基础上，从全球整体、不同区域、国际组织、各国政府、旅游城市、细分行业和旅游企业等层面系统梳理了旅游业的格局变化、战略调整、创新举措和变革方向。

众所周知，新冠疫情使全球陷入严重的经济衰退。作为兼具人员流动性和消费聚集性特征的服务业，旅游业受到的影响更为深刻。这些影响体现在哪些方面？从区域、国家、行业来看，又有什么差别？面对新的挑战，国际组织、各国

政府、旅游城市、旅游企业都做出了哪些响应？如何判断旅游业未来的走势？这些都是今年这份报告所要回答的问题。

《报告》围绕“变革”这个主题，沿着全球旅游经济结构性复苏这条主线，对疫情之下全球旅游复苏态势、区域旅游发展格局变化、T20国家旅游发展表现、重点城市旅游创新发展战略等问题进行了全面研究。相信这份研究成果能够帮助大家从各个角度把握疫情背景下全球旅游的最新趋势。

W 您认为全球旅游业结构性复苏呈现的四个趋势性变化已经显现了吗？未来多长时间我们能够清晰地看到这种变化？

S 我们所说的四个趋势性变化有的已经有所显现，比如疫情改变了世界旅游经济延续多年的总体格局，以新兴经济体、亚太板块驱动旅游经济增长的格局已被打破，发达经济体、欧美板块的份额得以上升。再者，产业集中度会有所提升。旅游经济向公共医疗水平高的国家集中，旅游市场向国内和周边地区集中，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，行业主导的能力在加强，同时中下游的压力也在增加。还有，科技手段前所未有地全面融入行业中，旅游产业的数字化进程在加快。另外，对可持续发展的重视更高。世界范围内的减碳行动对旅游业产生了深刻的影响，可持续旅游已经由疫情前的可选项逐步变为一种必选项。这些趋势都已经有了初步显现，而且在未来会进一步得到加强。

还有些趋势性变化目前只是露出端倪，未来五到十年时间里会表现得更为明显。例如，旅游业将更加依赖城市，形成主要依托于城市间而不是国家间交换的旅游网络。再比如，旅游业复苏进程中将产生断层。旅游业复苏不是按照原有路径的等比例扩张，不同的经济体和企业获得的复苏机遇和能力迥然不同，形成旅游业复苏中的条条断层线。发达国家和欠发达国家的断层加深，头部企业和中小企业的差异加剧，资本市场对先行修复产业和旅游业这类待修复产业的认知更加分化，轻资产企业和重资产企业间形成分层，盈亏的断层线、资本断层线将进一步扩大。

W 《报告》最后提到“全球旅游将经历‘二战’后最大的一次重塑，全球旅游将产生全新的格局、结构和方

式，并在全球社会经济体系中寻找新的位置”，这充分说明了新冠疫情对全球旅游业产生的巨大影响，您能就这一点再深入介绍一下吗？

S 如前所述，全球旅游正在经历“二战”以来最大的挑战，也是最为深刻的重塑和变革。一方面，全球旅游的规模、结构、格局、发展理念、发展方式等都在变化；另一方面，我们也会重新思考旅游对于经济、社会、城市以及个体的价值和意义。正是在这次危机中，我们更加深刻地认识到旅游的重要性、旅游业的重要性，以及旅游经济的重要性。它不仅意味着就业、资本、收益、经济增长，更关乎数以亿计人类的生活和幸福。可以说，世界经济的全面复苏不可能在旅游业缺位的条件下实现。

从目前来看，即使人们的旅游距离、旅游消费短期内受疫情所限，但仍在积蓄着蓬勃的力量。即便是在长距离旅行受阻的情况下，微度假、本地游、周边游等的走热，无不显示出旅游市场需求的内在活力。从长期来看，旅游业并非简单重启而是重塑。旅游业的复苏不是在原有路径下的简单延续，全球旅游业的重启过程伴随着发展格局的重置、行业内涵和外延的扩展以及发展方式的转变。旅游业的全面复苏是结构性的，从中将蜕变出一个全新的全球旅游业。

W 针对今年报告的结论和预测的趋势，您认为像联合会这样的全球性国际旅游组织将如何为全球旅游业蜕变做出自己的贡献？

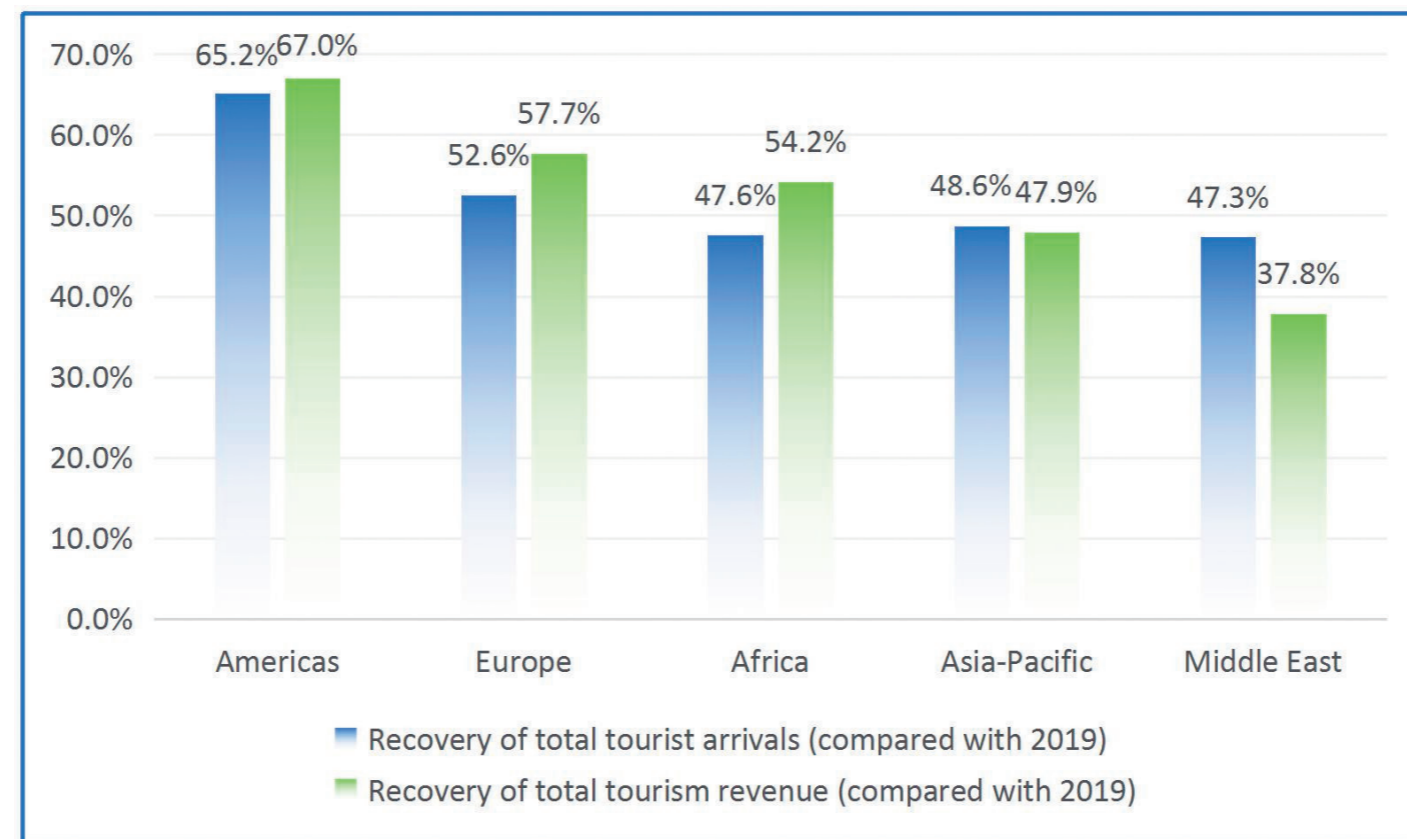
S 近年来，特别是疫情暴发以来，以世界旅游城市联合会（WTCF）为代表的国际旅游组织在引导和促进旅游行业复苏和发展方面做出了诸多努力，包括发布专业研究报告、制定行业复苏指南、确定共同行动方案，等等。面对新的趋势，作为世界上第一个以城市为主体的全球性旅游组织，世界旅游城市联合会可重点围绕城市，并以城市为纽带连接更多国家和地区，加强相互之间的交流合作。可选择旅游重点细分行业，形成发展指南，推广最佳实践；可选择代表性的城市，重点研究其旅游复苏和创新举措，对其他城市形成经验借鉴；可选择表现突出的企业，研究其发展战略和创新做法，形成案例库；也可以延续往年的培训计划，用线上和线下相结合的方式，对相关国家、地区和城市的旅游管理者进行培训。

Interpretation of the Report on World Tourism Economy Trends (2022)

In March 2022, Tourism Research Center of the Chinese Academy of Social Sciences and the World Tourism Cities Federation worked together to release the Report on World Tourism Economy Trends. The report made predictions on how to effectively respond to the challenges presented by the COVID-19 pandemic and continue to promote the development of the world tourism economy. This journal interviewed Dr. Song Rui, the research director and publisher of the report. She answered readers' major concerns one by one.

W WTCF S SONG RUI

W As a researcher of the Report, you have released the reports for several consecutive years. What do you think are the differences between World Tourism Economy Trends (2022) and those of the previous years? In addition, we have noticed the statement: "this report centers on structural recovery of global tourism economy, holistically studies and summarizes the recovery trends of global tourism industry amid the pandemic,



The recovery of total tourist arrivals and tourism revenue in the five regions in 2021

changes of regional tourism development patterns, tourism development in T20 countries, innovative development strategy of tourism in major cities, etc." Is it the research direction and focus of this report?

S World Tourism Economy Trends (2022) is the latest achievement jointly made by the Tourism Research Center of the Chinese Academy of Social Sciences and the World Tourism Cities Federation for the 6 consecutive years of cooperation and research. On one hand, we have kept the thrust and framework of the report unchanged and attempted to build a 3-D picture showing the latest development trends of world tourism from the perspective of the globe, region, country, city, industry and enterprise over the past six years. On the other hand, we have

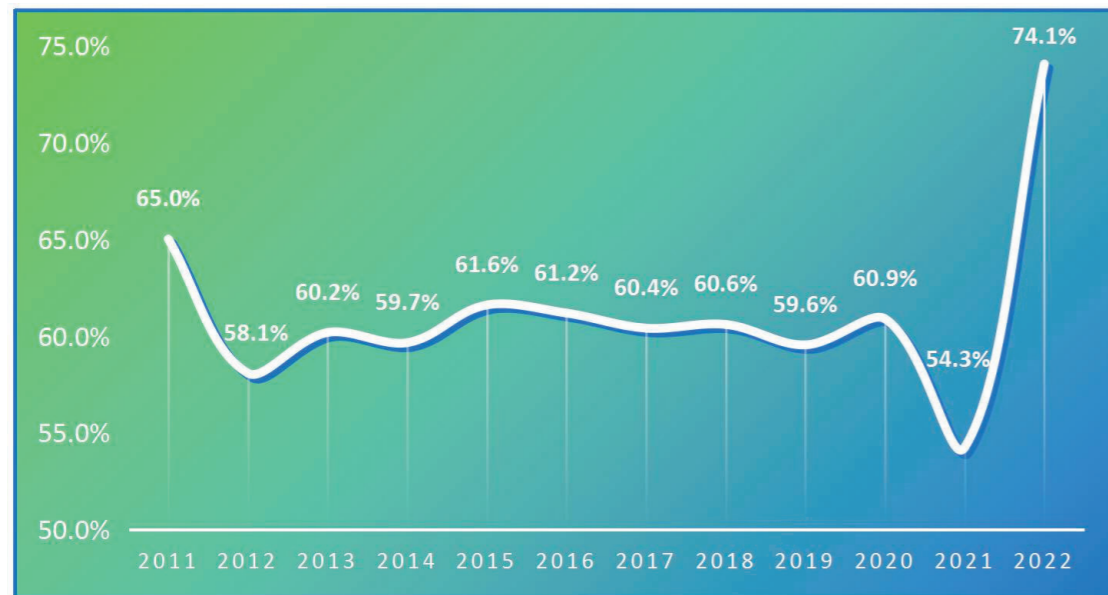
PHOTOGRAPHS: WORLD TOURISM ECONOMY TRENDS (2022)

also worked hard to explore new themes and forms. Different from previous years, the highlight of the report this year is reform. We have tried to reveal various changes of global tourism industry in all aspects during the pandemic. Dynamic changes of external environment in economic development, foreign trade, international investment, regional differences and impact of the pandemic, together with challenges arising therefrom are analyzed. On this basis, this report throws light upon changing layout, strategic adjustment, innovative measures and reform direction of the tourism industry in perspectives of the globe, different regions, international organizations, national governments, tourism cities, segment industries and tourism enterprises.

It is well-known that the COVID-19 pandemic has triggered a severe economic recession globally. Characterized by mobility and clustering of consumption behaviors, the tourism industry is more vulnerable to the impact. What are these impacts? What are the differences in perspectives of region, country and industry? Faced with new challenges, what have international organizations, national governments, tourism cities and enterprises done in response? How can we judge the future trends of the tourism industry? The above questions are answered in this year's report. The Report is on the theme of reform. This report centers on the structural recovery of global tourism economy, holistically studies and summarizes the recovery trends of global tourism industry amid the pandemic, changes of regional tourism development patterns, tourism development in T20 countries, innovative development strategy of tourism in major cities, etc. I am convinced that the research result will help readers grasp the latest trends in world tourism during the epidemic in all respects.

W Do you think that the structural recovery of the global tourism economy demonstrates four trends of changes? When will we clearly observe such changes?

S Some of the four trends of changes have been shaped. For instance, the pandemic changes the layout of world tourism economy that lasted several years. The structure of tourism economic growth driven by emerging economies and the Asia-Pacific countries has been disrupted, with the share of the developed economies and Europe and America increasing. Furthermore, the industrial concentration will be slightly increased. Tourism economy is centralized in countries with abundant public health resources. Tourism market favors



The proportion of international tourism revenue in T20 countries to the global tourism revenue (2011–2022)

the domestic market and travelling around cities. Industrial resources gather in cities. A short-distance trip is preferred. The control of the industrial chain is concentrated on the tourism platform. The industry leading capacity is being strengthened, while the pressure on the middle and lower reaches is also increasing. The digitalization of tourism industry is also accelerating as high-tech means are unprecedentedly integrated into the industry. Moreover, sustainable development is more valued. The carbon reduction movement around the world has profound influence on the tourism industry. Sustainable tourism has turned out to be a requirement rather than an alternative. These trends have basically come into being, which will be strengthened in the future.

Some trends that are just emerging will be more obvious in five to ten years. For instance, the tourism industry will depend more on cities and further develop inter-city tourism network instead of inter-state tourism network. The faults will appear in the process of recovery. The recovery of tourism industry doesn't reproduce the original pattern.

Opportunities and abilities to recover will vary in different economies and enterprises, forming industrial fault lines. The disparity between developed and underdeveloped countries is expanding. The gap between top enterprises and middle and small-sized enterprises will be further widened. The capital markets will have a discrepant attitude towards trades that have been recovered in advance or are still to be recovered. The big differences between light-asset and heavy-asset enterprises will be increased. The fault line between profit and loss and the fault line of capital are expected to be further expanded.

W According to the last part of the report, "global tourism will go through the largest reshaping since World War II. It will produce brand-new layout, structure and means and even relocate its position in the global socioeconomic system". This fully elucidates tremendous influence of COVID-19 on global tourism. Could you give a further explanation?

S As previously mentioned, global tourism is

PHOTOGRAPHS: WORLD TOURISM ECONOMY TRENDS (2022)

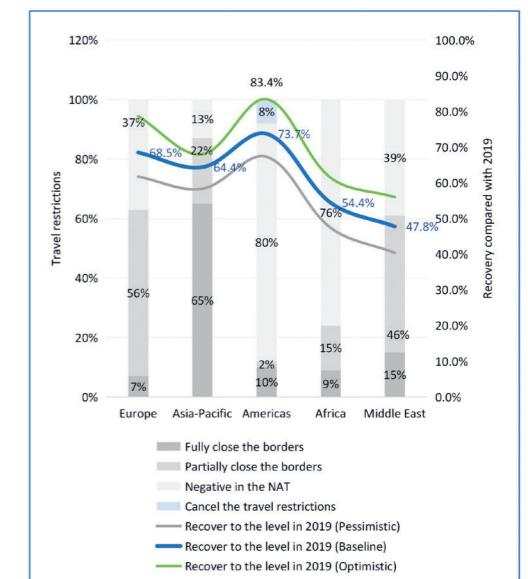
confronted with the greatest challenge since World War II and the most profound reshaping and reform. On one hand, the scale, structure, layout, development idea and ways are changing. On the other hand, we will rethink about the values and significance of tourism for the economy, society, city and individuals. In this crisis, we are more deeply aware of the importance of travel, tourism industry and tourism economy. The tourism industry provides not only employment, capital, revenue and economic growth but also is related to the livelihood and happiness of billions of people. In other words, the full recovery of the global economy is impossible if tourism industry is absent.

At present, travel distance and tourist consumption are hindered by the pandemic in the short term, but the tourism industry still gathers tremendous strength. The unavailability of long-distance trip makes mini-vacation, local tour and travelling around become popular. That fully shows the internal vitality of tourism market demands. In the long term, the tourism industry reveals not a simple restart but reshaping. The recovery of the tourism industry doesn't simply follow original routes. The restart of global tourism is accompanied by reconstruction of development patterns, expansion of industry intension and extension and a change of development ways. The overall revival of the tourism industry turns out to be structural, from which a brand-new global tourism industry is coming into being.

W On the basis of conclusions and predicted trends in this year's report, what contributions will WTCF make to the transformation of the global tourism industry?

S In recent years, especially since the outbreak of COVID-19, international tourism organizations represented by WTCF have made great efforts to

lead and promote the recovery and development of tourism industry. For example, they published professional research reports and formulated industry recovery guidance and collective action plans, etc. Faced with the new trends, WTCF, as the first city-based global tourism organization, can concentrate on cities to connect countries and regions, and enhance exchanges and cooperation. Industry segments can be selected to formulate development guidance and generalize best practice. Once representative cities are selected, the focus can be placed on its tourism recovery and innovative measures, providing experience for other cities. The development strategies and innovative measures of outstanding enterprises can be researched to establish a case library. Previous offline and online training programs can be used for travel managers in relevant countries, regions and cities.



Travel restrictions and tourism economic recovery in the five regions in 2022

Data source: Combining the data of the World Tourism Organization and this research.