

疫情背景下世界旅游城市 可持续发展 ——中国行动研究

文、图 / 联合国开发计划署 世界旅游城市联合会

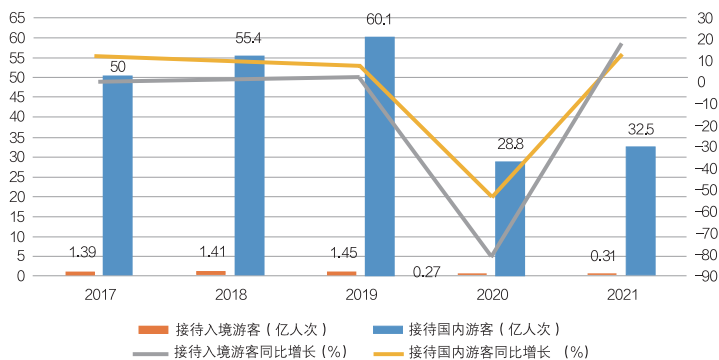
2015年，联合国正式通过可持续发展目标（SDGs），代表全世界消除贫困、共享繁荣、阻止地球退化、创建公正包容的社会，以及恢复全球可持续发展伙伴关系以确保“不让任何一个人掉队”的决心。

旅游城市是促进可持续发展的核心载体，全球GDP的80%以上来自城市，占全球人口的56.2%。在过去十年中，城市化在发展中经济体中最为明显，特别是在亚洲和大洋洲，城市化率从2010年的43.1%

上升到2020年的49.8%。城市化过程中如果治理得当，可以有助于实现可持续增长，在经济繁荣的同时更好地保护地球生态边界。因此，旅游业可以帮助城市在生态保护和社会经济发展之间取得平衡，将一个地区的生态优势和资源转化为增长和包容性发展的驱动力。可以说，旅游业是推动城市可持续发展的重要驱动力，有助于实现以人为中心的发展目标、促进城市经济可持续增长、推动城市绿色低碳化发展，促进城市可持续发展

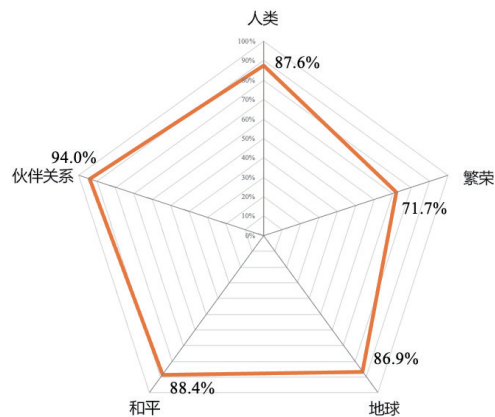


联合国可持续发展目标



(数据来源:各省区市国民经济和社会发展统计公报)

2017-2021年中国接待入境游客及国内游客人次统计



中国旅游城市 5P 复合指标评估示意图

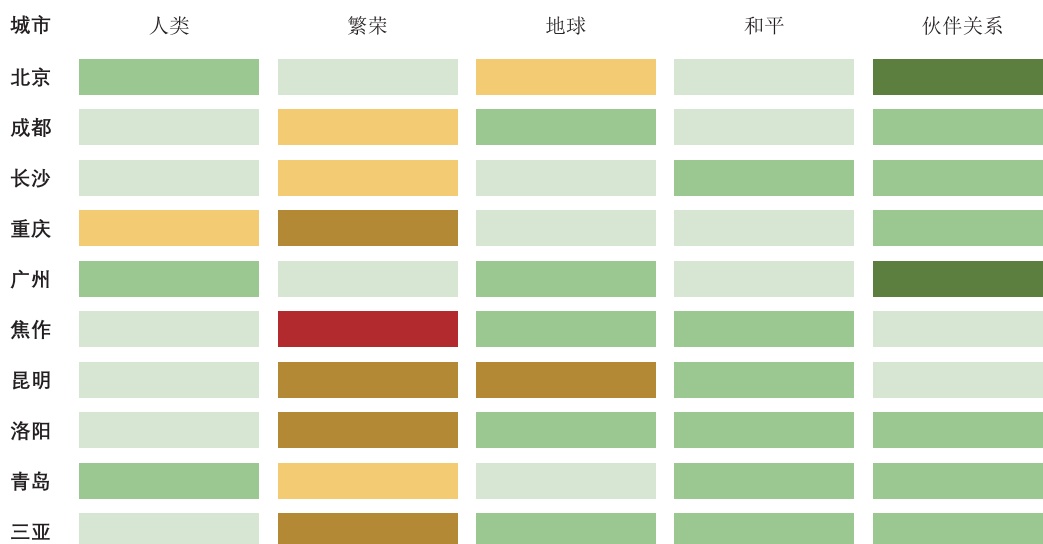
目标全面实现。

2020年发生的新冠肺炎疫情对旅游业造成了灾难性冲击,旅游收入整体下滑,就业遭受重创,甚至一些城市旅游活动因疫情一度停摆,旅游城市的可持续发展受到前所未有的挑战。2019年全球旅游总收入达到5.8万亿美元,相当于2019年全球GDP的6.7%。2020年全球旅游总收入仅有2.92万亿美元,较2019年下降50.9%;2021年达到3.3万亿美元,略有恢复但不足疫情前的60%。旅游业是世界上最大的行业之一,支持着全球3.3亿个工作岗位。根据世界旅游理事会(WTTC)的基线情景,COVID-19导致超过1.21

亿个全球旅游业工作岗位损失。虽然大流行病起到了加速作用,但包括气候变化、粮食安全、经济衰退和不平等加剧等相互关联且不可预测的风险,促使旅游城市不得不重新思考并调整发展模式,从而更具韧性。

在此背景下,联合国开发计划署与世界旅游城市联合会将可持续发展目标应用于旅游城市,并首先以WTTC的中国会员城市为对象开展评估及行动研究,希望借此重塑城市规划、政策和行动,从而更好地重振后疫情时代的旅游城市。

报告按照5P,即人类、繁荣、地球、和平及伙伴关系评估方法学,对北京、成都、长沙、重庆、广州、



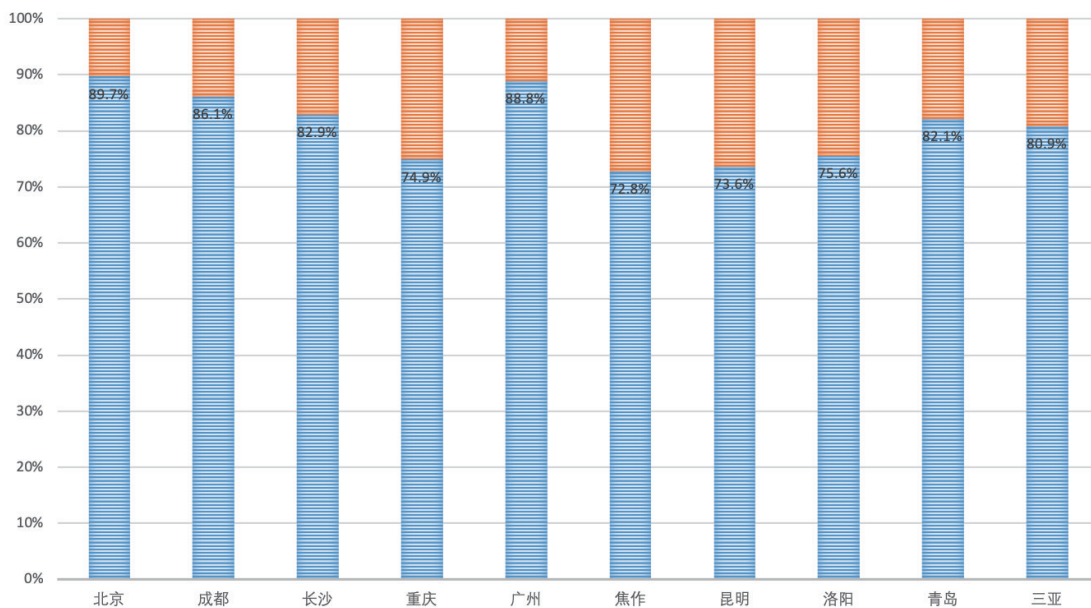
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中国旅游城市 5P 分维度实施进展

“行业纾困”相关政策

序号	城市	发布时间	发布机关	政策名称	主要内容
1	北京	2021.12.24	北京市经济和信息化局、北京市发展和改革委员会	关于应对疫情防控常态化促进中小企业健康发展若干措施	制定了持续减轻企业负担、加大金融支持力度、积极保障企业权益、精准做好企业服务 4 项措施，16 条专项扶持政策
2	重庆	2022.05.10	重庆市发展和改革委员会	重庆市助企纾困政策措施清单	2020 年以来重庆市出台的助企纾困政策措施，包括减税降费、金融支持、促进就业稳定等八大类，共计 147 项
3	成都	2022.04.18	成都市文化广电旅游局等 5 部门	支持旅游行业纾困发展的政策措施	提出继续落实旅行社暂退旅游服务质量保证金政策、支持旅游企业开展岗位技能培训等 10 项政策措施
4	长沙	2022.04.13	长沙市文化旅游广电局	关于落实纾困政策支持文旅行业恢复发展的实施办法	出台做好普惠性政策落地服务、暂退旅行社全部质保金、免收文旅行业各协会困难会员单位会费等 8 条举措
5	三亚	2022.04.14	三亚市人民政府	三亚市促进经济平稳增长的若干政策	提出加大企业纾困扶持力度、强化金融支持、培优培强重点企业、促进经济恢复发展 4 方面 20 条措施加大企业纾困扶持力度
6	焦作	2022.04.01	焦作市人民政府	关于应对新冠肺炎疫情进一步帮助市场主体纾困解难的三十条措施	针对不同行业提出 30 条纾困解难政策，通过暂退旅游服务质量保证金、加大文化娱乐业资金支持等措施扶持文体旅游业发展
7	青岛	2022.05.29	青岛市人民政府	青岛市激发市场活力稳定经济增长若干政策措施	从旅行社纾困、金融支持、文化和旅游消费等 7 个方面支持青岛旅游企业共渡难关
8	广州	2022.05.11	广州市人民政府办公厅	广州市促进服务业领域困难行业恢复发展的若干措施	旅游业方面对符合条件的旅行社旅游服务质量保证金暂退比例由 80% 提高到 100%；积极推动以保险替代现金或银行保函交纳旅游服务质量保证金试点工作
9	昆明	2022.06.24	昆明市人民政府	扎实稳住经济增长的实施方案	通过将旅行社旅游服务质量保证金暂退比例提高至 100%、大力发展乡村旅游、发放旅游消费券等措施促进旅游业复苏
10	洛阳	2022.04.29	洛阳市人民政府办公厅	洛阳市助企纾困推动经济平稳健康发展的若干政策措施	通过暂退旅游服务质量保证金、加强银企合作、加大对旅行社扶持力度等措施助力旅游业纾困

(数据来源:各城市官方网站)



中国旅游城市可持续目标实现率

焦作、昆明、洛阳、青岛、三亚共 10 个中国旅游城市进行了面向可持续发展目标的进展评估，实施差距的总体评估和分项评估。

评估显示，10 个城市 SDG 总体实现率达到 80.7%，实施进展率均超过 70%，其中，有 7 项可持续发展目标实现进展超过 90%。通过评估识别出未来中国旅游城市的重点行动领域。

“繁荣”，是疫情背景下中国旅游城市应该重点关注的维度。这既是疫情下城市经济可持续发展面临的挑战，也是未来平衡推进 SDG 目标实施的重点工作领域。就一些跨领域的主题，如平等方面，已经取得了进展。评估显示，10 个城市在是否制定法律框架来促进、推行和监督实现平等和无性别歧视方面都达成了目标。

疫情之下，中国旅游城市在疫情应对、旅游扶贫、文旅融合、绿色发展、智慧旅游、区域合作等方面做出了许多有意义的探索和实践，助力城市可持续发展。

疫情应对方面，广州通过制定旅游纾困解难政策、振兴文化消费市场、创新城市旅游产品业态等方式积极应对疫情对旅游业带来的负面影响。旅游扶贫方面，重庆市武隆区通过把生态旅游资源优势转化为产业优势和经济优势，走出了一条以生态旅游助推群众脱贫致富的新路子。文旅融合方面，长沙、洛阳、三亚推动文化和

旅游深度融合发展，实现资源共享、培育城市经济可持续发展新动能。绿色发展方面，焦作、成都、青岛践行“绿水青山就是金山银山”的理念，以旅游发展促进生态环境保护，大力发展低碳旅游，促进城市旅游绿色可持续发展。智慧旅游方面，昆明打造了“一部手机游云南”全域旅游智慧平台，通过智慧赋能，推动城市经济发展。区域合作方面，北京以旅游助力国际交流中心建设，通过发挥国际组织网络、大型体育赛事、重要国际性活动等多渠道的平台作用，推动开放包容的全球伙伴关系。

除此之外，各个城市也努力推进旅游产业生态化、低碳化发展，推进旅游企业的节能减排。以低消耗、低排放、高效率、循环利用为原则，中国的绿色饭店新增评定数量稳步增加，2020 年新增 197 家。与此同时，也注重倡导绿色健康的生活理念，开展绿色旅游活动宣传，引导游客在游览中尽量采用低碳排放的游览车、公共交通、自行车或步行游玩等方式，培育低碳旅游新风尚。

正如联合国秘书长古特雷斯在 2022 年 9 月 27 日“世界旅游日”发表的致辞中所说，旅游业在促进包容、保护自然、增进不同文化相互了解方面具有特殊的能力。尽管新冠肺炎疫情对全球可持续发展造成重大冲击，但全球对旅游业和城市经济的复苏仍然给予无限期望。

The Sustainable Development of World Tourism Cities in the COVID Context: The Research on Chinese Actions

WORDS、PHOTOGRAPHS/ UNITED NATIONS DEVELOPMENT PROGRAMME WORLD TOURISM CITIES FEDERATION

In 2015, the United Nations (UN) formally adopted the 2030 Agenda for Sustainable Development and the 17 Sustainable Development Goals (SDGs) which set out a global vision to end poverty, share prosperity, protect the planet, build just and inclusive societies, and restore global partnerships for sustainable development, to ensure that no one is left behind.

More than 80% of global GDP is generated in cities where 56.2% of the global population lives. In the last ten years, urbanization has been most pronounced in developing economies, especially in Asia and Oceania, where the urbanization rate rose to 49.8% in 2020 from 43.1% in 2010. Urbanization, if well managed well, can significantly contribute to sustainable growth that promotes prosperity with the protection of the planetary's boundaries. Against this backdrop, tourism can help cities strike a balance between ecological conservation and socio-economic development, translating an area's ecological advantages and resources into growth and inclusive drivers. On the other hand, as a major driver of sustainable urban development, tourism can help cities achieve people-oriented development goals, promote sustainable economic growth and facilitate green and low-carbon

development, with widespread contribution across many of the SDGs.

The COVID-19 outbreak in 2020 had a global catastrophic impact on the tourism industry and led to a decline in tourism revenue and heavy job losses. In 2019, global tourism revenue stood at \$5.8 trillion, 6.7% of global GDP that year. Tourism is one of the industries that has suffered the most during the pandemic. In 2020, total global tourism revenue was only \$2.9 trillion, down 50.9% from 2019. The figure reached \$3.3 trillion in 2021, a slight recovery but still less than 60% of the pre-pandemic level. According to the baseline scenario of the World Travel and Tourism Council (WTTC), COVID-19 resulted in over 121 million global tourism industry job losses. In some cities, all tourism activities were suspended. Tourism cities have faced unprecedented challenges including their sustainable development.

Interrelated and unpredictable risks, including climate change, food security, economic decline and rising inequality, are forcing tourism cities to reconsider and adjust their development models to become more resilient, a process accelerated by the pandemic.

To respond to these challenges, the United Nations Development Programme (UNDP) and the World Tourism Cities Federation (WTCF) are applying an SDGs progress assessment to help cities reshape their planning, policies and actions to reinvigorate their tourism sectors in the post-pandemic era while contributing to the advancement of the SDGs.

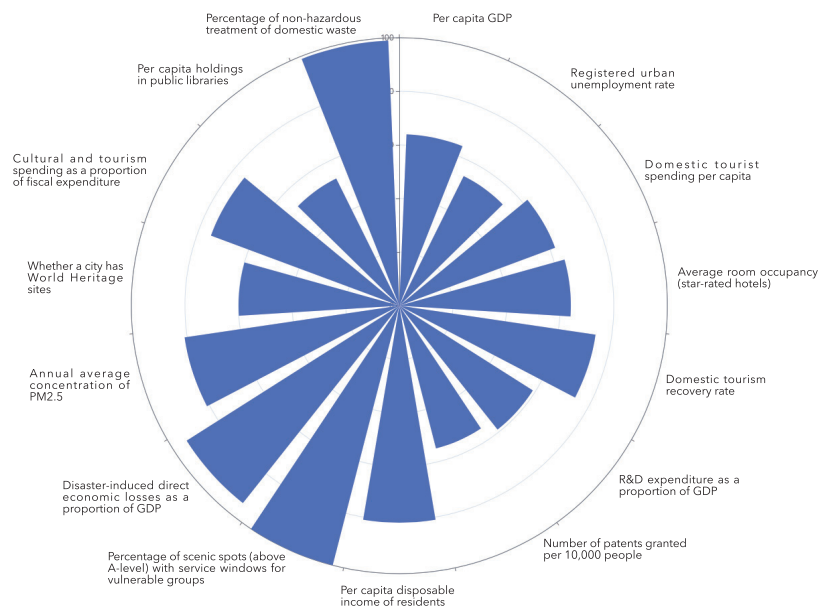
The report presents the Chinese Tourism Cities SDG Assessment Index, developed around the 5P dimensions of the SDGs, People, Prosperity, Planet, Peace and Partnerships. The Index is used to determine overall and category-specific SDG progress and gaps in 10 Chinese tourism cities, Beijing, Chengdu, Changsha, Chongqing, Guangzhou, Jiaozuo, Kunming, Luoyang, Qingdao, and Sanya.

Overall, the analysis shows that these 10 cities are 80.7% on the way towards meeting their SDG targets by 2030. All of the goals are at least 70% fulfilled and progress towards seven SDGs has surpassed 90%. The assessment also identifies key action areas for China's tourism cities.

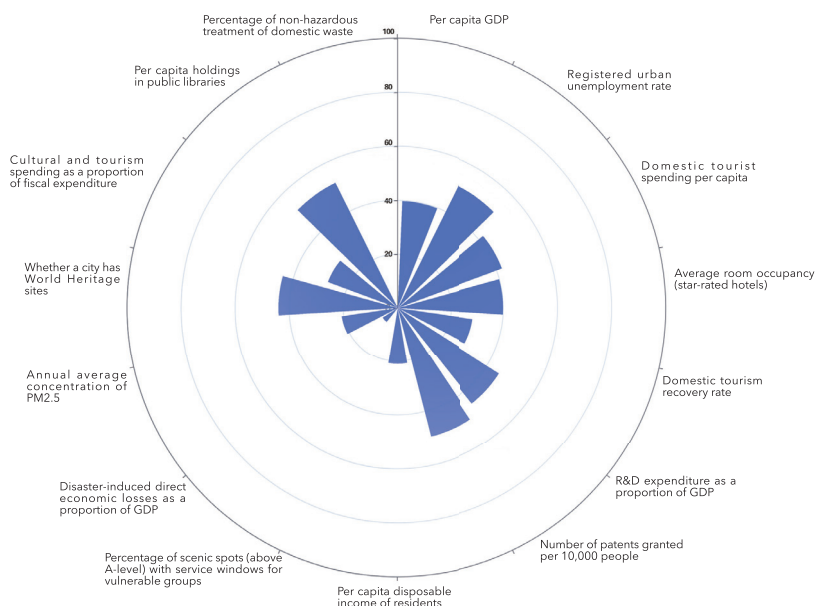
The 'Prosperity' dimension in particular needs more attention. This dimension was not only challenging for sustainable urban development during the pandemic but is also a key action area for meeting the SDGs by 2030.

Related to cross-cutting themes, such as equality, progress has been recorded: the assessment shows the 10 cities have the legal frameworks to promote, practice and monitor equality and the elimination of gender discrimination.

The report also presents a series of case studies shared by the cities' Governments that



'Prosperity dimension' assessment progress



'Prosperity dimension' gaps

Selection of tourism-relief policies

No.	City	Date	Issuer	Policy	Content
1	Beijing	Dec. 24, 2021	Beijing Municipal Bureau of Economy and Information Technology, Beijing Municipal Commission of Development and Reform	Measures to Normalize COVID-19 Prevention and Control to Promote the Healthy Development of Small and Medium-Sized Enterprises (SMEs)	Formulated four measures to reduce the burden on enterprises; offered stronger financial support; protect the rights and interests of companies; provided accurate corporate services; and adopt 16 special support policies.
2	Chongqing	May 10, 2022	Chongqing Municipal Commission of Development and Reform	List of Relief Policies and Measures for Enterprises	The list contains 147 relief policies and measures adopted by Chongqing since 2020 to help enterprises, under eight categories such as tax credits and fee reduction, financial support, and promotion of employment stability.
3	Chengdu	Apr. 18, 2022	Chengdu Municipal Bureau of Culture, Broadcast-TV, and Tourism, jointly with four other departments	Policy Measures to Support Tourism	Proposes 10 policies and measures, which include temporarily refunding all quality assurance deposits paid by travel agencies, supporting companies to conduct skill training sessions, etc.
4	Changsha	Apr. 13, 2022	Changsha Municipal Bureau of Culture, Tourism, Radio and Television	Action Plan for Implementing Relief Policies to Support the Recovery and Development of the Culture Sector and the Tourism Industry	Introduces eight measures, including the implementation of inclusive policies, temporarily refunding all quality assurance deposits paid by travel agencies, and waiving membership fees for challenged members of tourism associations.
5	Sanya	Apr. 14, 2022	The People's Government of Sanya Municipality	Policies for Promoting Steady Economic Growth	Proposes 20 measures that focus on four areas for providing stronger support for companies, including strengthening financial support, fostering key companies, and promoting economic recovery and development.
6	Jiaozuo	Apr. 1, 2022	The People's Government of Jiaozuo Municipality	Thirty Measures for Helping Market Entities Manage the COVID-19 Pandemic	Proposes 30 industry-specific relief policies to support the development of the culture sector, the sports industry, and tourism, including temporarily refunding the quality assurance deposit paid by tourism service providers and offering stronger financial support to cultural and entertainment industries.
7	Qingdao	May 29, 2022	The People's Government of Qingdao Municipality	Policies and Measures for Stimulating Market Vitality and Stabilize Economic Growth	Seven aspects of support for Qingdao's tourism companies to manage current challenges, including support for travel agencies, financial support, culture and tourism consumption, etc.
8	Guangzhou	May 11, 2022	General Office of the People's Government of Guangzhou Municipality	Measures for Promoting the Recovery and Development of Challenged Sectors in the Service Industry	To support the tourism industry, measures include raising the refund rate for quality assurance deposits paid by travel agencies from 80% to 100%; it also proposes launching a pilot for the payment of quality assurance deposits (a fund managed by the Ministry of Culture and Tourism in protection of tourists' rights) with insurance instead of cash or bank guarantees in the tourism sector
9	Kunming	Jun. 11, 2022	The People's Government of Kunming Municipality	Action Plan for Stabilizing Economic Growth	Outlines a policy for raising the refund rate for quality assurance deposits paid by travel agencies from 80% to 100%; it also proposes prioritizing rural tourism and offering travel coupons to facilitate the recovery of the tourism sector.
10	Luoyang	Apr. 29, 2022	General Office of the People's Government of Luoyang Municipality	Policies and Measures for Helping Companies Meet Challenges and Promoting Sound Economic Growth	Offers relief to the tourism industry by temporarily refunding quality assurance deposits, strengthening bank-company cooperation, and increasing support for travel agencies.


(Source: Official websites of the departments/authorities)

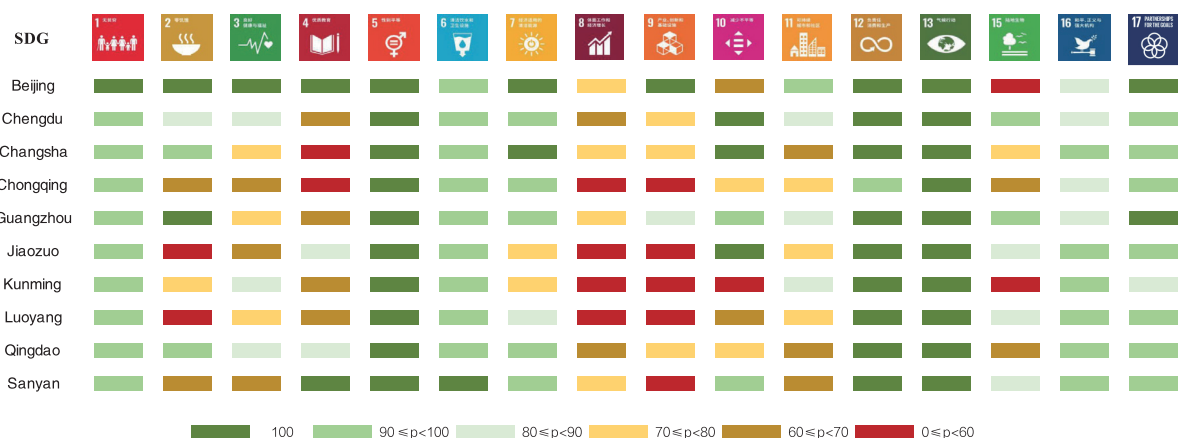
showcase measures undertaken for COVID-19 prevention and control, poverty alleviation through tourism, integration of culture and tourism, green development, smart tourism and regional collaboration for sustainable urban development.

Guangzhou has adopted relief policies to enable tourism recovery, boosted the cultural consumer market, and explored innovative tourism products to respond to the negative impacts of COVID-19 on the tourism industry. Wulong, a district of Chongqing, has turned its rich ecological and tourism resources into business and economic advantages, and is pursuing innovating approaches to poverty alleviation by fostering ecotourism. Changsha, Luoyang, and Sanya are all integrating culture and tourism to better share resources and foster new growth drivers that enable sustainable economic development. Jiaozuo, Chengdu, and Qingdao, are promoting ecological conservation through the green, low-carbon and sustainable development of urban tourism. Kunming has launched a smart platform to support tourism and boosted economic development by tapping into smart technologies. Beijing has evolved into a centre for international engagement through tourism

development. Leveraging its advantages as a host to international organizations, large sports events and major global events, the city aims at promoting open and inclusive global partnerships.

While promoting ecotourism, cities have also been encouraging tourism companies to reduce emissions, lower consumption, improve efficiency and increase recycling. The number of new green hotels in China has been rising steadily, with 197 new hotels rated as green hotels in 2020. Meanwhile, cities have been advocating for green and healthy lifestyles, conducting promotional campaigns for green tourism, and encouraging tourists to use low-emission tour buses, public transportation, and bicycles or travel by foot as part of overall efforts to promote new trends in low-carbon tourism.

As UN Secretary-General Antonio Guterres outlined in his message on World Tourism Day (September 27, 2022), "tourism has the power to foster inclusion, protect nature, and promote cultural understanding". Although the COVID-19 pandemic has had a major impact on global sustainable development, it is also an opportunity to explore innovative pathways for a sustainable recovery of tourism and urban economies. 



SDG Attainment Progress of Assessed Tourism Cities