



Report on World Tourism Economy Trends (2018)  
世界旅游经济趋势报告 (2018)

世界旅游城市联合会 中国社会科学院旅游研究中心 宋瑞

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# Section I

Comprehensive and fast growth of the global tourism economy

全球旅游经济全面、快速增长



2017年全球旅游总人次118.8亿，为全球总人口的1.6倍

The total global tourist arrivals is estimated to be nearly 11.9 billion in 2017, 1.6 times as many as the total global population

## Global Total Tourist Arrivals

### 全球旅游总人次（2015-2018）

			Estimate	Prediction
	2015	2016	2017E	2018F
Total global tourist arrivals (100 million) 全球旅游总人次（亿人次）	104.5	111.2	<u>118.8</u>	126.7
Ratio of global tourist arrivals to global population 全球旅游总人次与全球总人口之比（100%）	1.4	1.5	<u>1.6</u>	1.7



2017年全球旅游总收入达5.3万亿美元，  
相当于全球GDP的6.7%

Estimated global tourist revenue for 2017 is USD 5.3 trillion, around 6.7% of the global GDP

## Global Total Tourist Revenue (2015-2018)

### 全球旅游总收入（2015-2018）

			Estimate	Forecast
	2015	2016	2017E	2018F
Total global tourist revenue (USD trillion) 全球旅游总收入（万亿美元）	4.9	5.0	<u>5.3</u>	5.6
Percentage of total global tourist revenue to global GDP (%) 全球旅游总收入相当于全球GDP的比例（%）	6.6	6.7	<u>6.7</u>	6.8

# 2017年全球旅游增速高于上年

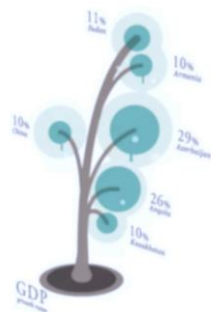
Global tourism growth rate is increasing in 2017

## Global tourism economy growth rates (2015-2018)

## 全球旅游经济增长速度（2015-2018）

			Estimate	Forecast
	2015	2016	2017E	2018F
Growth rate of global tourist arrivals (%) 全球旅游总人次增长率	6.2	6.4	<u>6.8</u>	6.7
Growth rate of total global tourist revenue (%) 全球旅游总收入增长率	-4.2	2.6	<u>4.3</u>	5.9

# 2017年全球旅游经济增速显著高于GDP增速



Global tourism economy growth rate is forecast to exceed that of global GDP in 2017

## Comparison with GDP growth rates (2016-2018)

### 全球旅游经济与全球GDP增速比较（2016-2018）

		Estimate	Prediction
	2016	2017E	2018F
Global GDP growth rate (%) 全球GDP增长率 IMF	3.1	<u>3.5</u>	3.6
Global GDP growth rate (%) 全球GDP增长率 WB	2.4	<u>2.8</u>	2.9
Total global tourist revenue growth rate (%) 全球旅游总收入增长率	2.6	<u>4.3</u>	5.9

# 2018年全球旅游增长继续高于全球经济增长

The global tourism growth will still be higher than the global economy growth in 2018

## 2018 global tourism economy forecast

## 2018年全球旅游经济预测

	High growth situation 高增长情形	Ordinary situation 一般情形	Low growth situation 低增长情形
Total global tourist arrivals(billion) 全球旅游总人次 (十亿)	12.88	12.67	12.45
Growth rate of total tourist arrivals 全球旅游总人次增速	7.8%	<u>6.7%</u>	5.5%
Total global tourist revenue (USD 1 trillion) 全球旅游总收入 (万亿美元)	5.66	5.57	5.48
Growth rate of total global tourist revenue 全球旅游总收入增速	6.7%	<u>5.9%</u>	5.0%

# Section II

The evolving balance of the global tourism tripartite pattern

全球旅游三足鼎立格局更趋明显



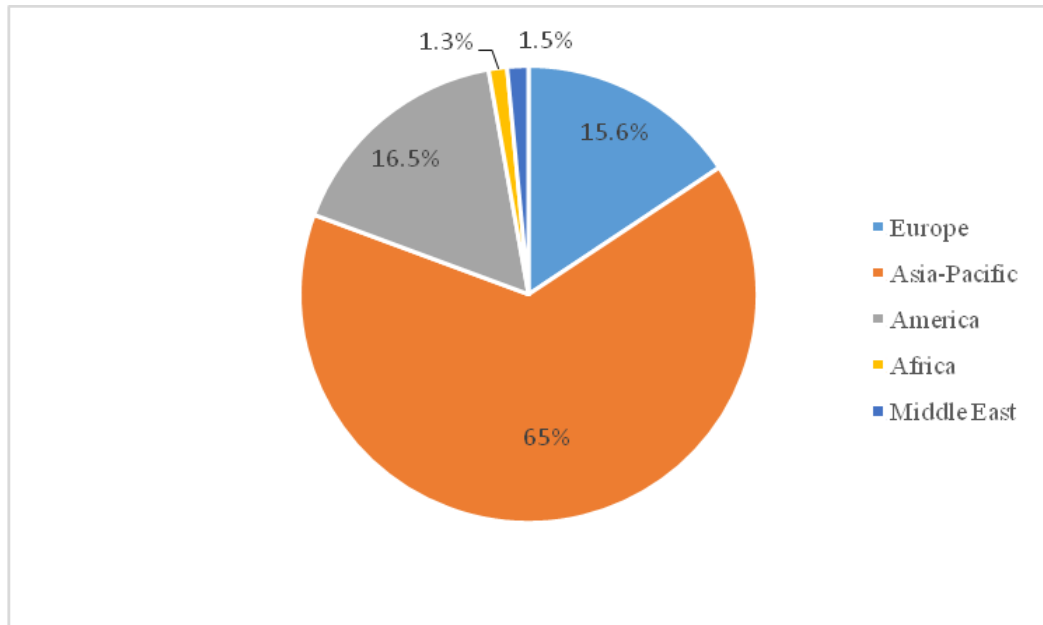


# 全球旅游格局中，欧洲份额缩小，美洲保持稳定，亚太持续扩大

European share of global tourism is shrinking, American share remains the same, Asian-Pacific share is expanding

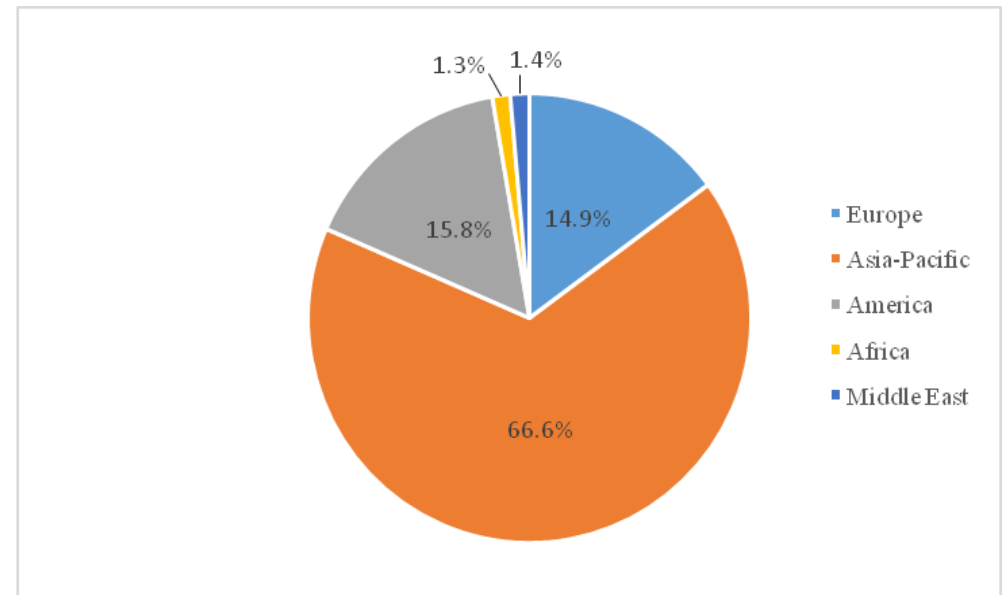
## • 各大板块旅游总人次占全球份额（2016）

Percentages of the total tourist arrivals of 5 regions in the total global tourist arrivals (2016)



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Percentages of the total tourist arrivals of 5 regions in the total global tourist arrivals (2017)

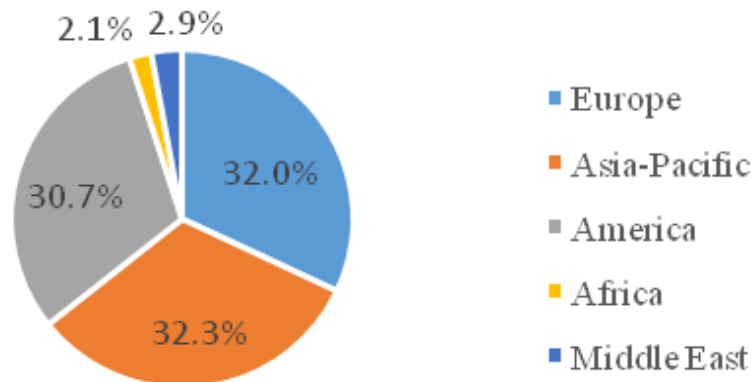


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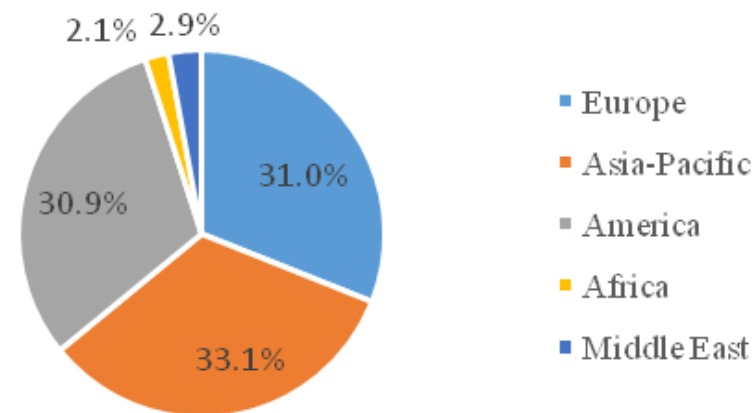
- 各大板块旅游总收入占全球份额（2016）

Percentages of 5 regions' total tourist revenue in the total global tourist revenue (2016)



- 各大板块旅游总收入占全球份额（2017）

Percentages of 5 regions' total tourist revenue in the total global tourist revenue (2017)



# 2017年全球旅游总人次和旅游总收入排名前十的国家

Top 10 countries in terms of tourist arrivals and tourist revenue

	Country and its world region 国家及其所在板块	Total tourist arrivals (million) 旅游总人次 (百万)	Country 国家	Total tourist revenue (USD billion) 旅游总收入 (10亿美元)
1	China (Asia-Pacific)中国 (亚太)	4,530	美国US	1,030
2	India (Asia-Pacific)印度 (亚太)	1,540	中国China	680
3	US (America)美国 (美洲)	1,250	德国Germany	380
4	Japan (Asia-Pacific)日本 (亚太)	320	英国UK	250
5	France (Europe)法国 (欧洲)	280	日本Japan	230
6	Indonesia (Asia-Pacific)印度尼西亚 (亚太)	260	法国France	200
7	Spain (Europe)西班牙 (欧洲)	200	印度尼西亚 Indonesia	190
8	Brazil (America)巴西 (美洲)	180	意大利Italy	170
9	Germany (Europe)德国 (欧洲)	170	墨西哥Mexico	140
10	UK (Europe)英国 (欧洲)	160	西班牙Spain	130

## 2018年三足鼎立格局更趋明显

The same pattern will be more evident in 2018

- 2018全球旅游各大板块占全球份额（预测）

### Tourism percentages of 5 regions in global tourism in 2018 (prediction)

	Asia-Pacific 亚太	America 美洲	Europe 欧洲	Middle East 中东	Africa 非洲
<b>Total tourist arrivals</b> 旅游总人次份额	68.0%	15.1%	14.3%	1.4%	1.2%
<b>Total tourist revenue</b> 旅游总收入份额	34.0%	31.0%	30.1%	2.9%	2.0%

# Section III

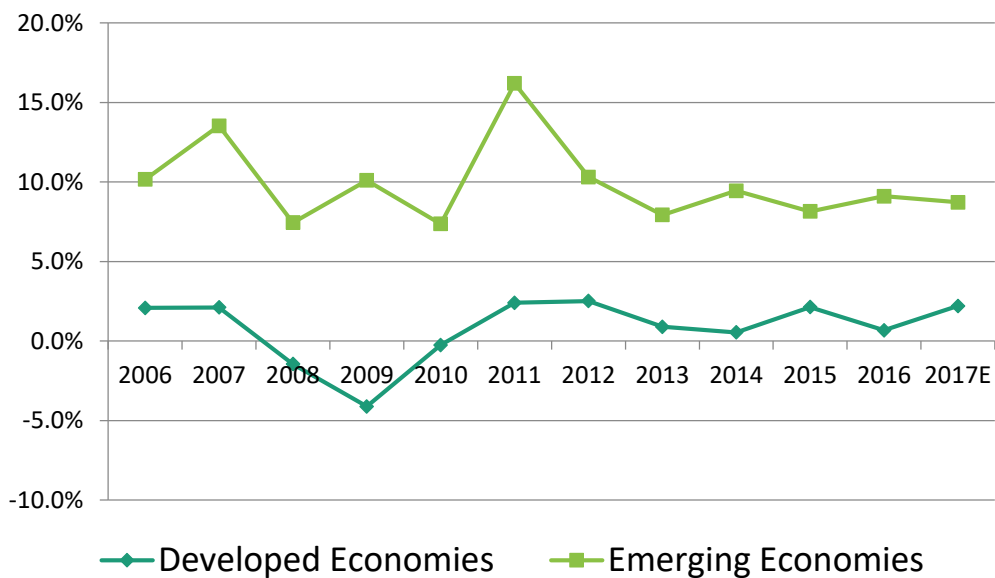
The faster growth of tourism in emerging economies

新兴经济体旅游业增速更快

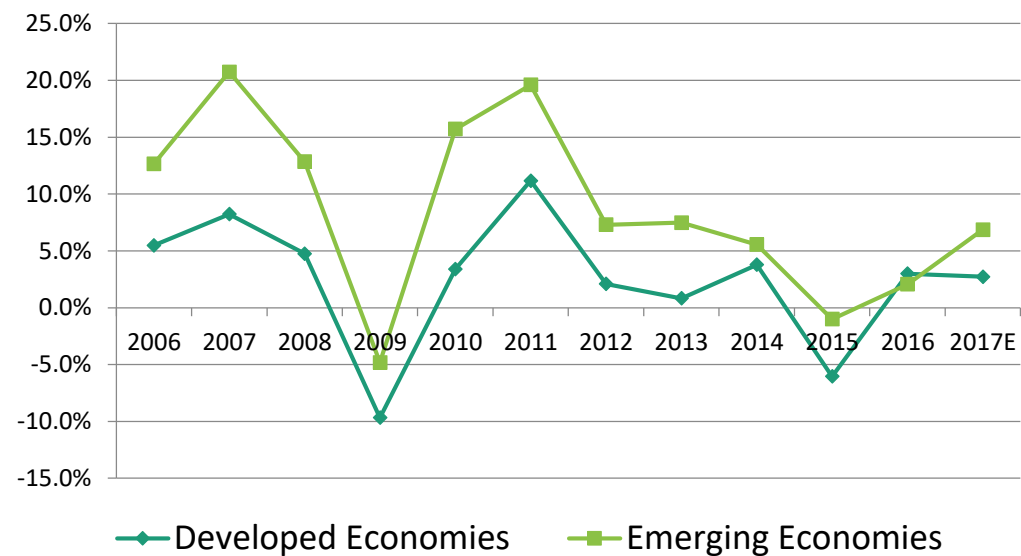


# 新兴经济体的旅游增速高于发达国家

Growth greater in emerging vs developed economies



- 不同经济体旅游总人次增长率 ( 2006-2017 )  
Growth rates of total tourist arrivals in different economies (2006-2017)



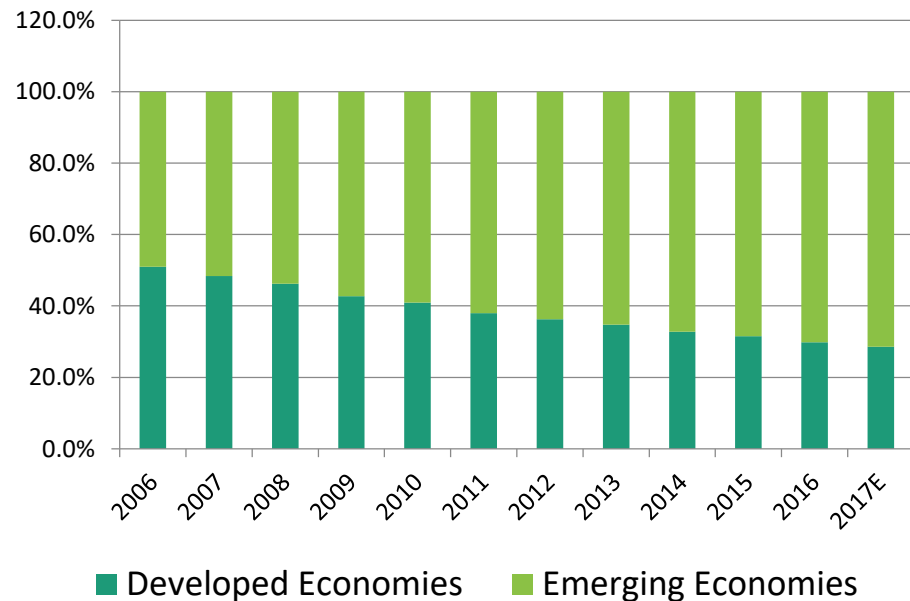
- 不同经济体旅游总收入增长率 ( 2006-2017 )  
Growth rates of total tourist revenues in different economies (2006-2017)

# 新兴经济体接待了全球七成游客，其旅游总收入占全球四成

Emerging economies hosted 70% of the global tourists and earned 40% of the global tourist revenue

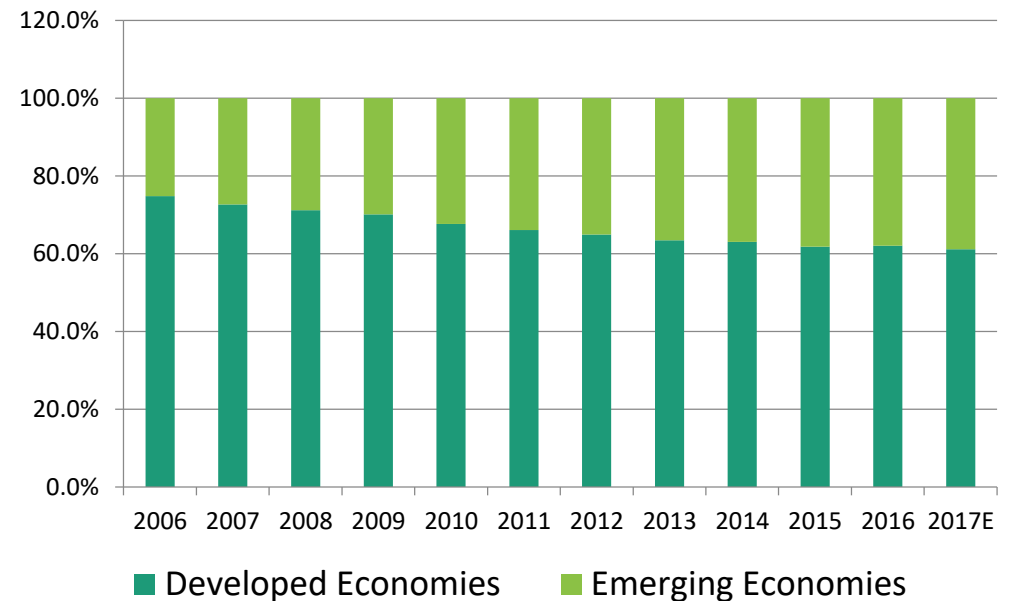
- 新兴经济体和发达经济体旅游总人次占比 (2006-2017)

Percentages of the total tourist arrivals of emerging economies and developed economies in the total global tourist arrivals (2006-2017)



- 新兴经济体和发达经济体旅游总收入占比 (2006-2017)

Percentages of the total tourist revenues of emerging economies and developed economies in the total global tourist revenue (2006-2017)



## 新兴经济体旅游未来增速将持续高于发达国家

In 2018, both tourist arrivals and tourist revenue of emerging economies will grow faster than those of developed countries

- 2018年新兴经济体和发达国家旅游增速（预测）

### Growth rates of the total tourist revenues of emerging economies and developed countries in 2018 (forecast)

	Developed countries 发达经济体	Emerging economies 新兴经济体
Growth rate of tourist arrivals 旅游总人次增速	1.8%	8.7%
Growth rate of total tourist revenue 旅游总收入增速	3.7%	9.3%



# Section IV

The outstanding tourism development of BRICS countries

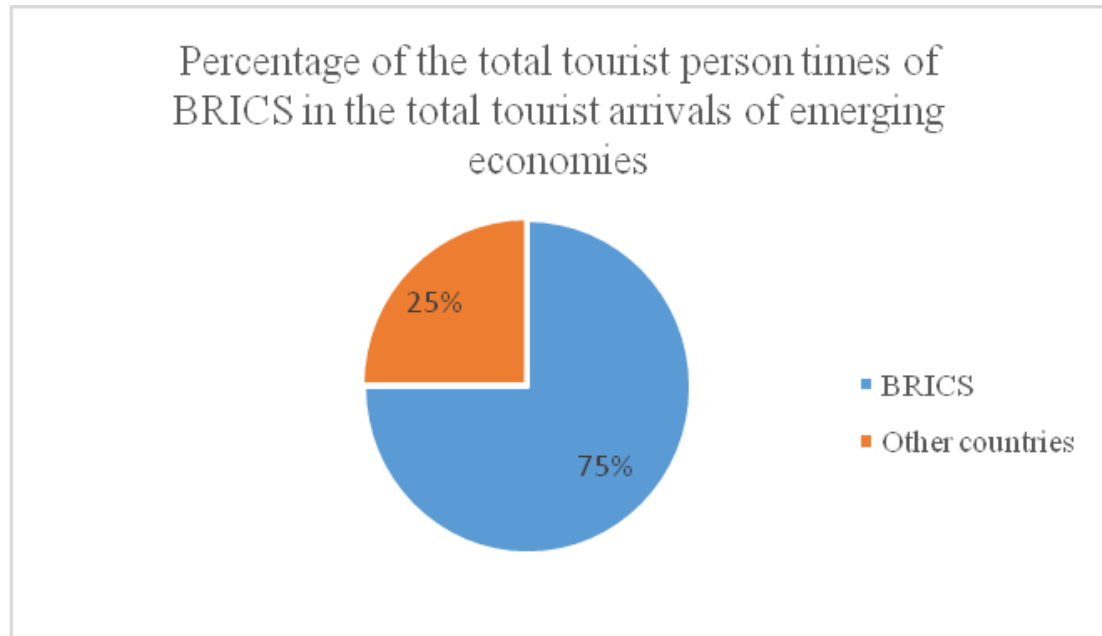
金砖国家旅游发展引人注目



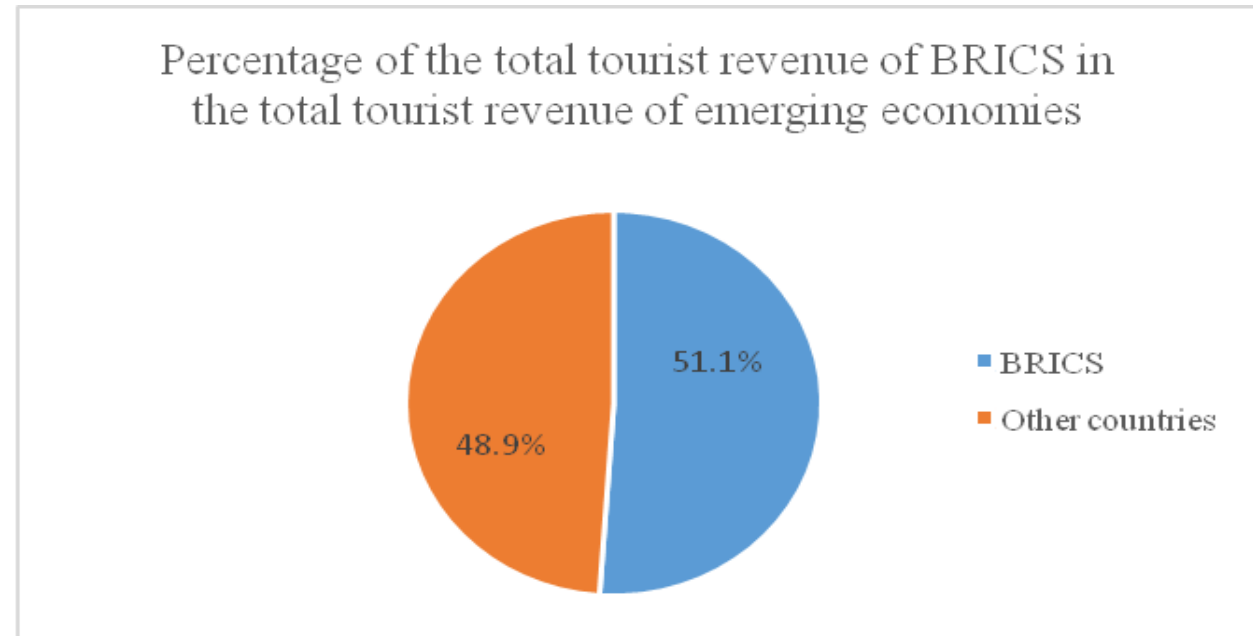
# 金砖国家旅游总人次占新兴经济体旅游总人次的3/4，旅游收入占1/2强

The BRICS countries account for three quarters and half of the total tourist arrivals and tourist revenue of emerging economies respectively

- 金砖国家旅游总人次在新兴经济体中的占比



- 金砖国家旅游总收入在新兴经济体中的占比



# Section V

Tourism growth's contribution to global trade

旅游促进全球贸易增长

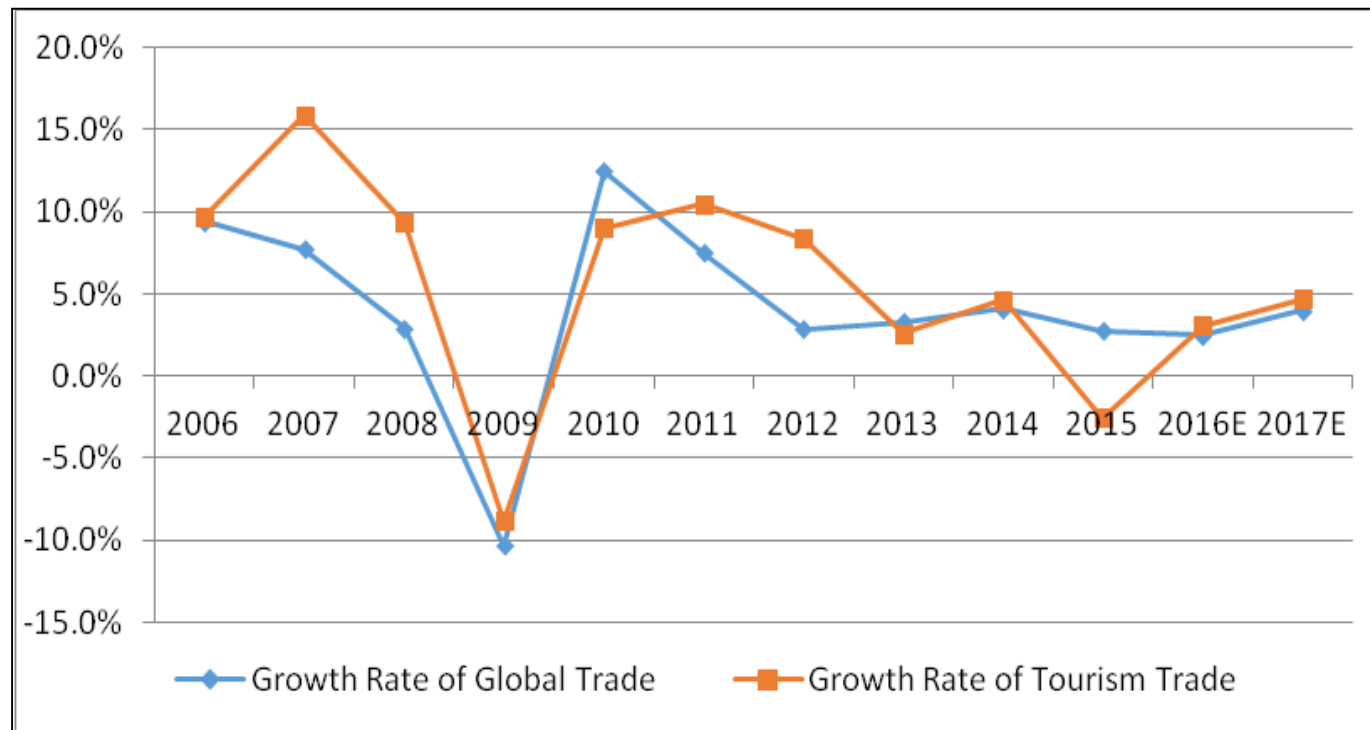


# 全球国际旅游增速高于全球国际贸易增速

The growth rate of the global international tourism is higher than that of the global international trade

- 全球贸易与旅游贸易增长率 ( 2006-2017 )

**Growth rates of global trade and global tourism trade (2006-2017)**

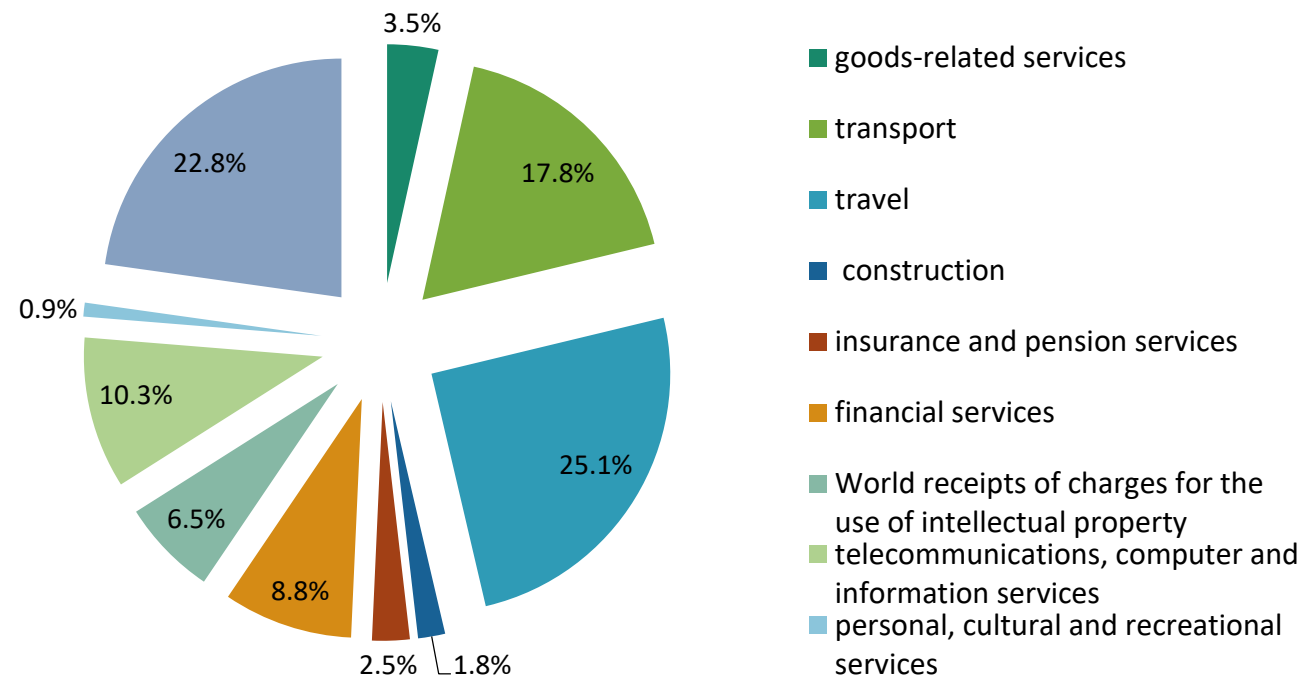


# 旅游成为国际服务贸易中最大组成部分，占比超过四分之一

Tourism has become the largest component of international trade in services

- 服务贸易构成

Percentages of all the components of trade in services<sup>1</sup>



<sup>1</sup> The data on the trade are from the WTO. The international tourist data are the data obtained by the research group through their measurements and calculation.

# Section VI

Rapid growth in global tourism investment

全球旅游投资快速增长

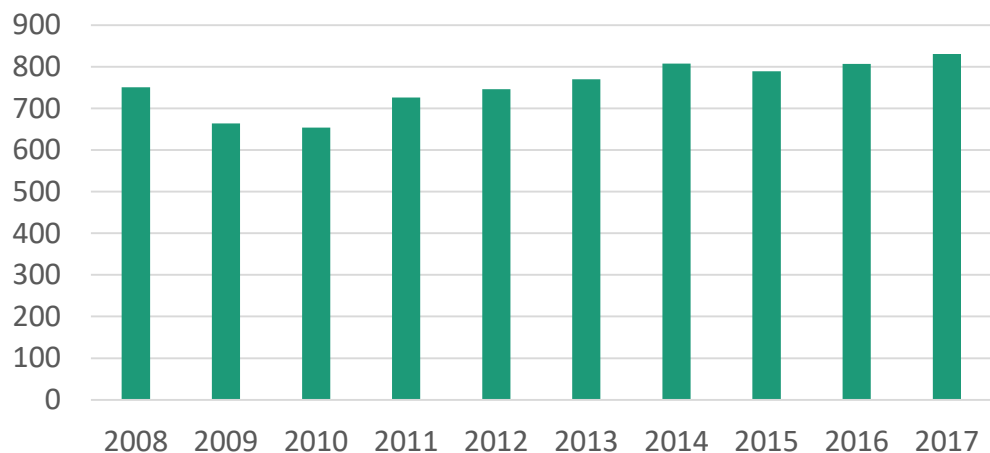


# 全球旅游投资较上年增长4.1%

Global tourism investment grows by 4.1%, compared with that of the previous year

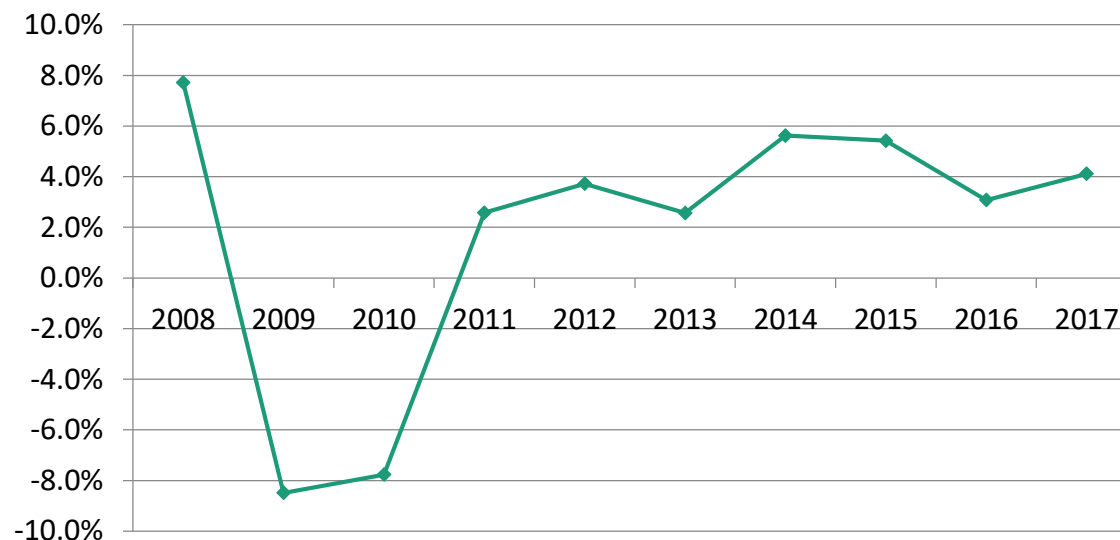
- 2008-2017年全球旅游投资额（十亿美元）

Global Tourism Investment amounts from 2008 to 2017  
(USD 1 Billion)



- 2008-2017年全球旅游投资增长率

Growth Rate of Global Tourism Investment in 2008-2017



Data Source: WTTC

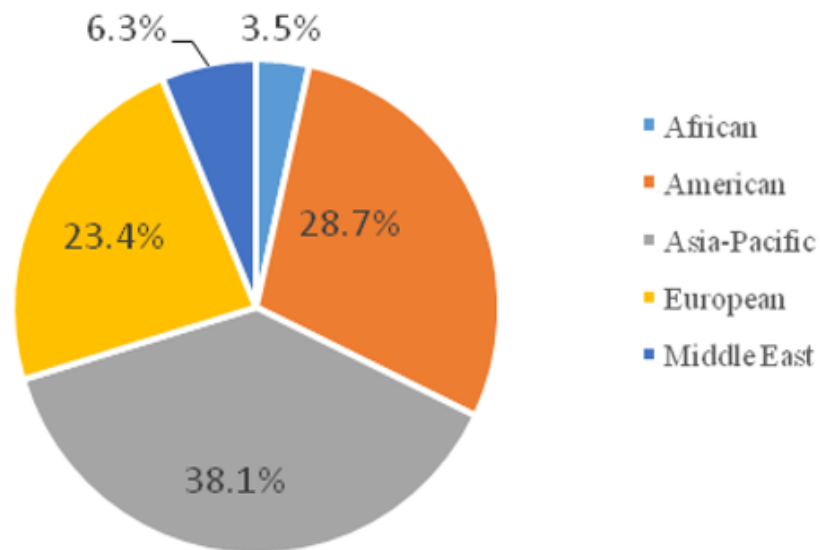
The tourism investment includes the inputs of the industries directly related to tourism.

# 亚太地区旅游投资规模最大，增速最快

Tourism investment in Asia-Pacific is the largest and the growth rate is the fastest

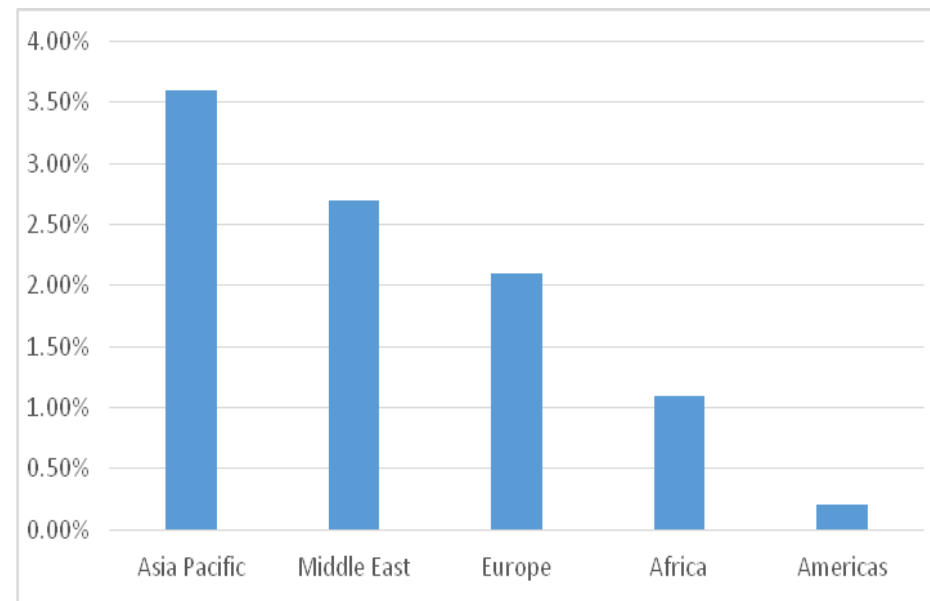
- 2017年五大板块旅游投资份额

Tourism investment percentages of five great regions (2017)



- 2008-2017年五大板块旅游投资年均增长率

Annual average tourism investment growth rates of the five great regions (2008-2017)

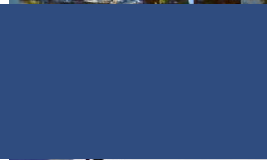




# Section VII

Cities important roles in the global tourism economy

城市在全球旅游经济中发挥重要作用

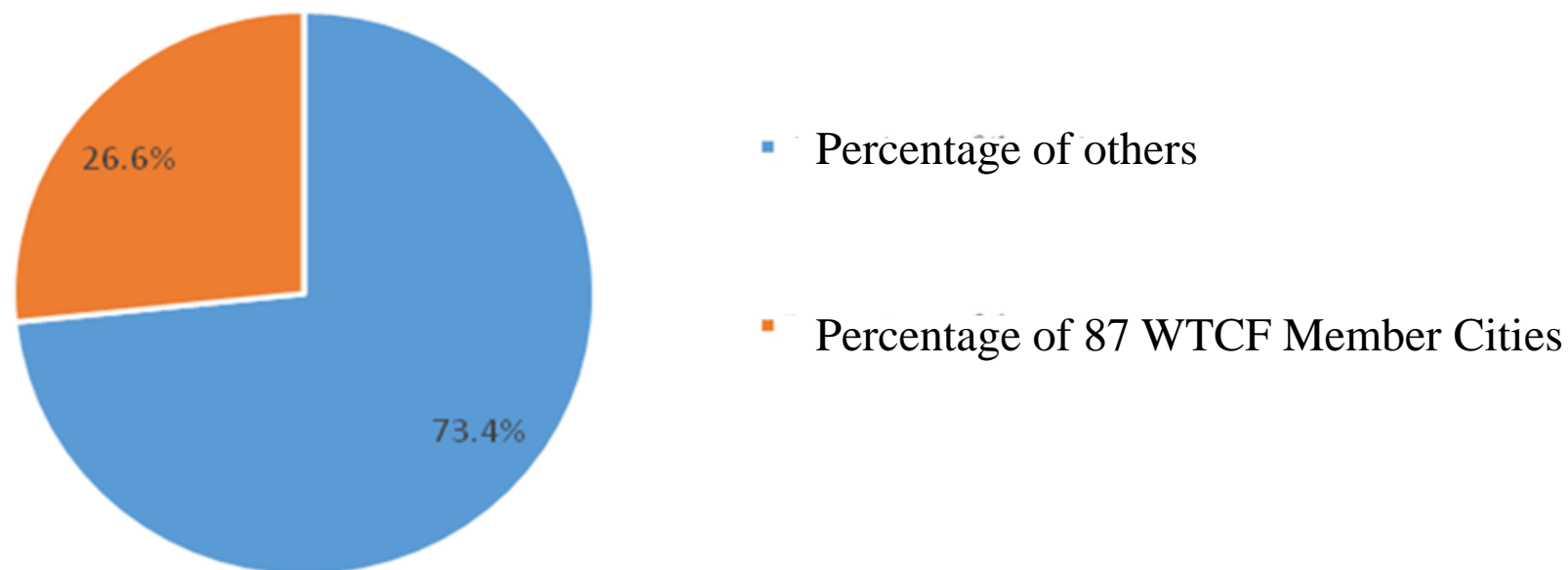


## WTCF 2/3 会员城市接待入境旅游者占全球 1/4 强

2/3 of the WTCF member cities have received more than ¼ of the global inbound tourists

- **87个WTCF会员城市接待入境旅游者占全球份额**

Percentage of the inbound tourists received by 87 of the WTCF member cities



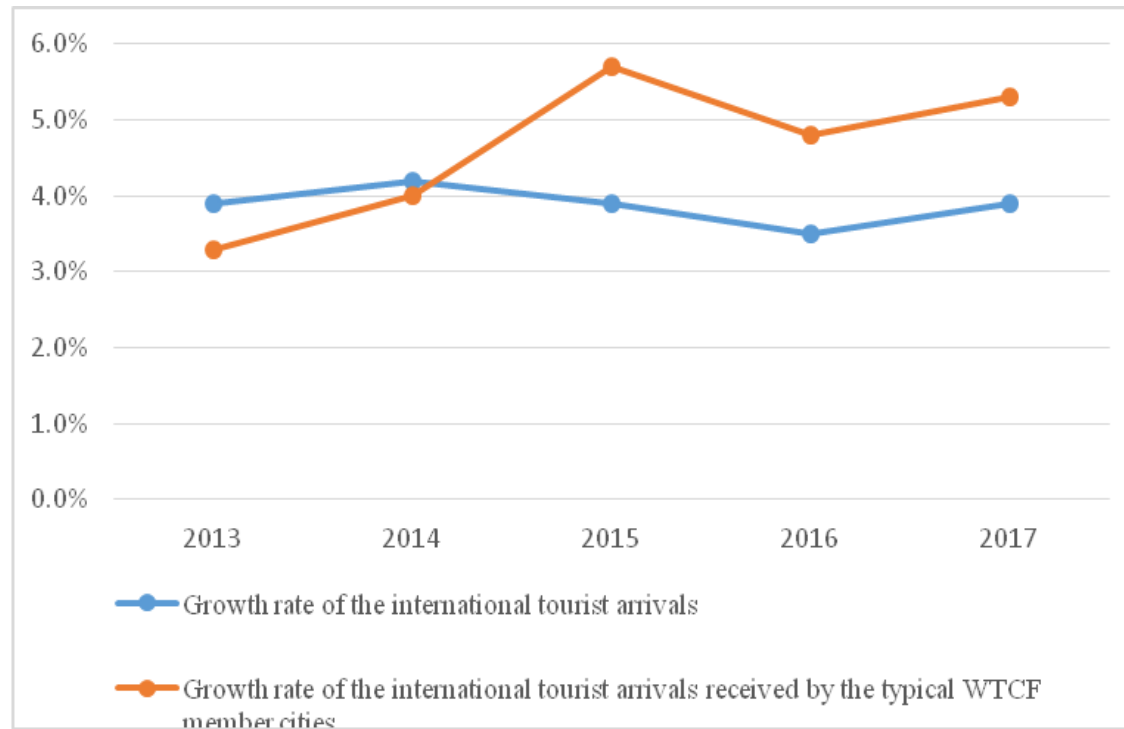
WTCF目前有城市会员128个

## WTCTF会员城市国际旅游增速渐超全球国际旅游增速

The growth rate of the inbound tourists of the WTCTF member cities surpassed the growth rate of global

- **WTCTF 87个会员城市国际旅游增速与全球国际旅游增速比较**

Comparison between the growth rate of international tourism to 87 WTCTF member cities and the global international tourism growth rate (2013-2017)

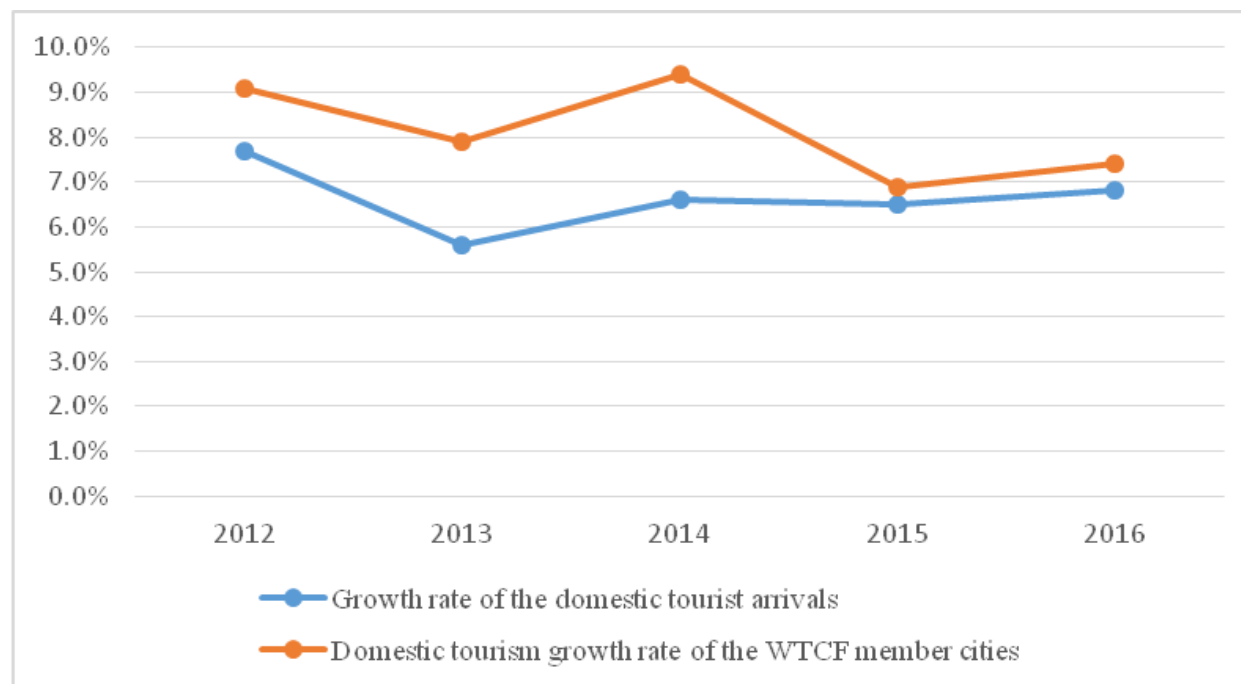


## WTCF会员城市的国内旅游发展高于全球国内旅游的增长

The domestic tourism growth rate of the WTCF member cities is higher than the global

- **WTCF44个会员城市国内旅游增速与全球国内旅游总人次增速（2012-2016）**

The domestic tourism growth rate of the 44 WTCF member cities and the growth rate of the total global domestic tourist arrivals (2012-2016)



# Section VIII

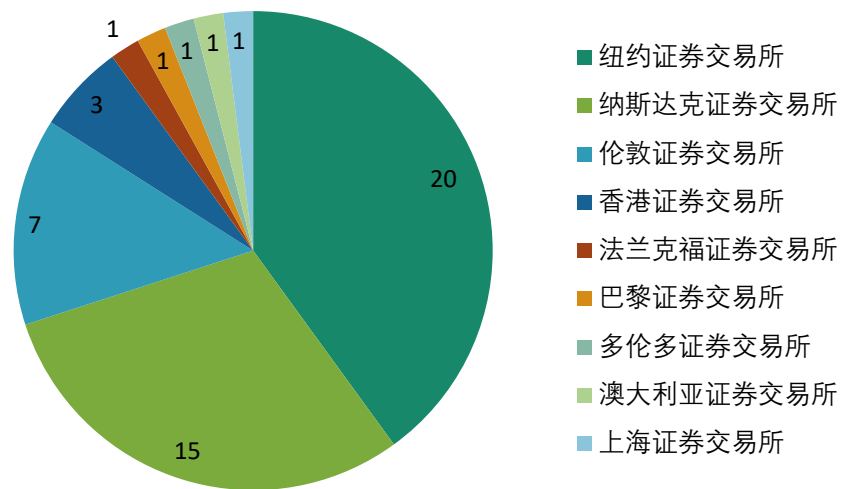
Good growth momentum of listed tourism companies

全球旅游上市公司增长与同期主要资本市场基本一致



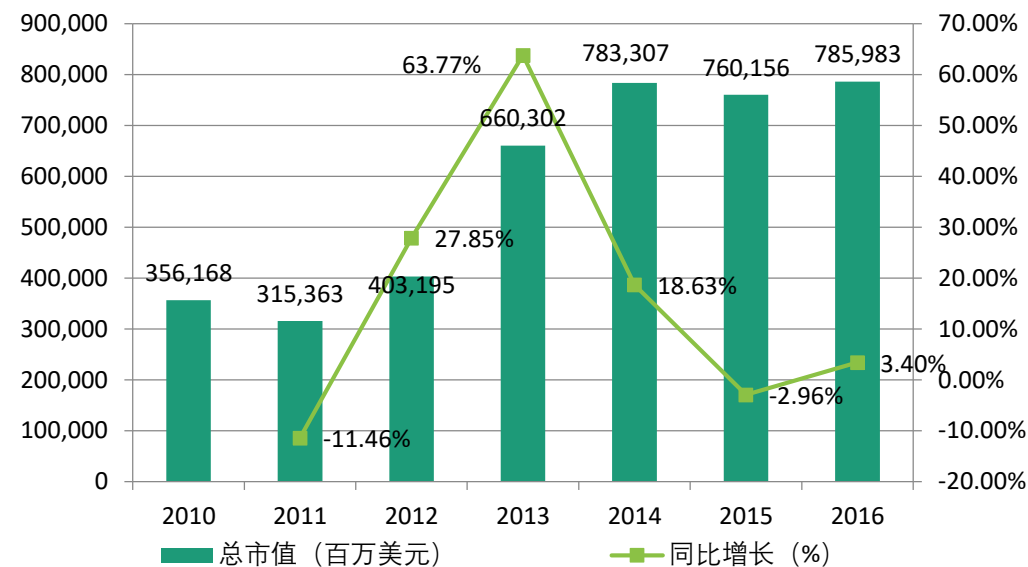
# 全球旅游上市公司增长与同期主要资本市场基本一致

Global listed tourism companies have maintained a good growth momentum



Locations of the listed tourism companies

50家样本旅游上市公司上市地点分布



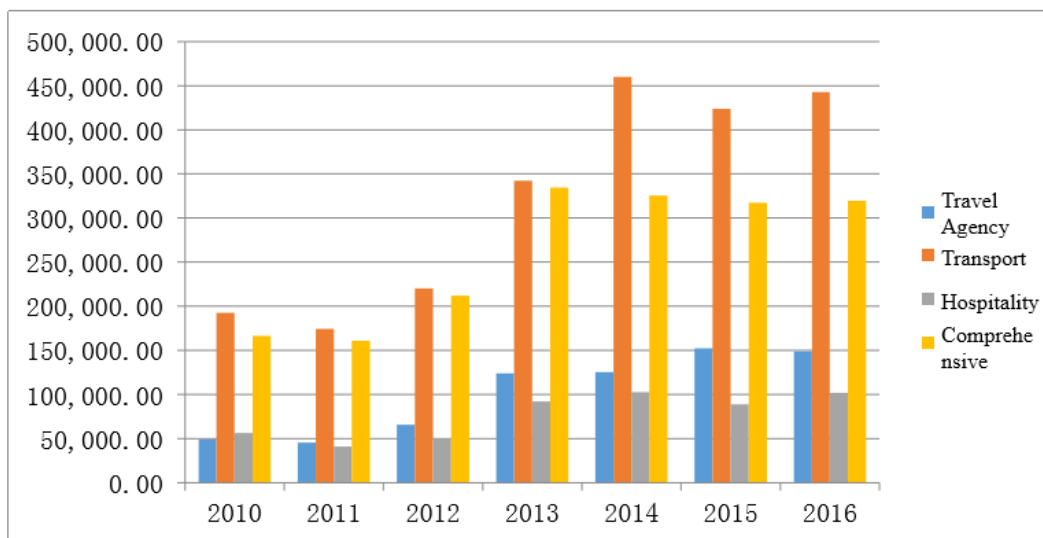
市值6年翻番  
年复合增长率14.04%

Total market capitalization and growth rate of the listed tourism companies (2010-2016)

50家样本旅游上市公司总市值及增长率 (2010-2016)

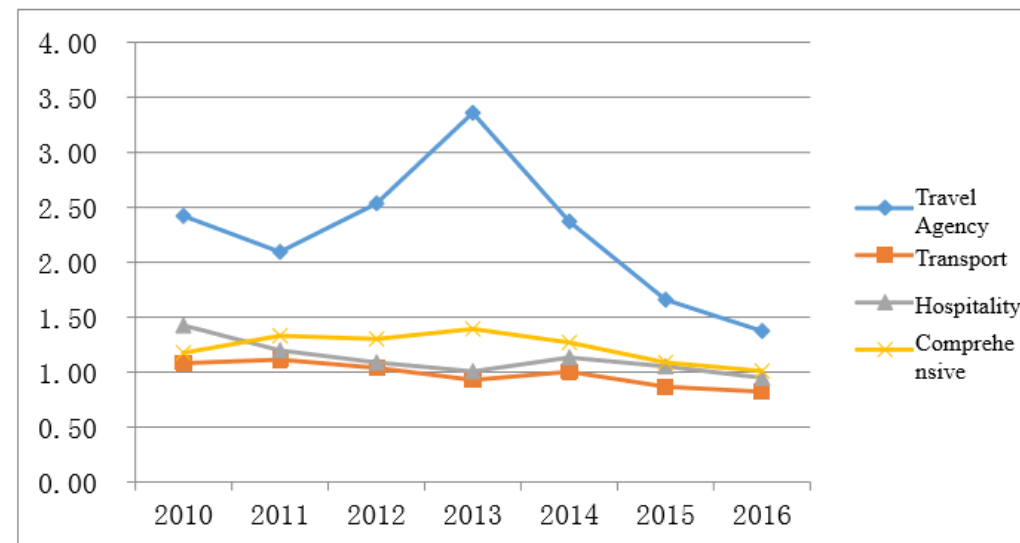
# 全球旅游上市公司增长与同期主要资本市场基本一致

Global listed tourism companies have maintained a good growth momentum



Total Market Value of Listed Tourism Companies by Segment (2010-2016)

旅游上市公司分行业市值规模（2010-2016年）  
交通规模最大，旅行社增速最快



Current Ratios Comparison of Listed Tourism Companies by segment (2010-2016)

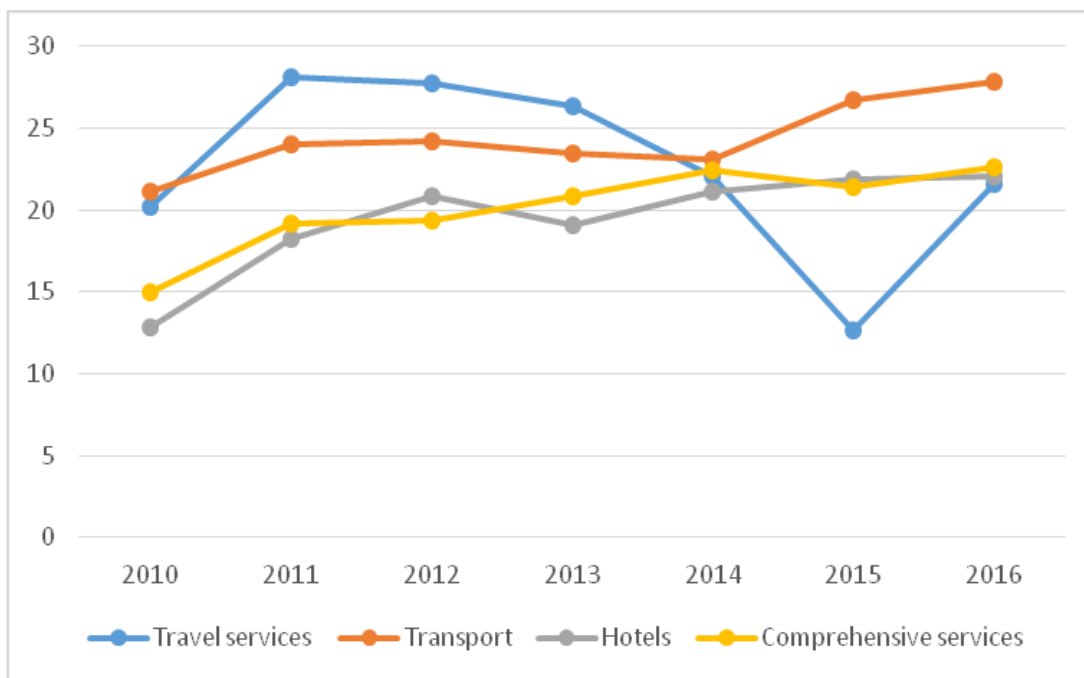
旅游上市公司分行业流动比率比较（2010-2016）  
旅行社流动比率显著高于其他类型公司

## 除旅行社行业有较大波动外，其他旅游上市公司盈利能力总体稳步提升

Except for travel services, the profitability of listed tourism companies generally went up steadily

- **旅游上市公司分行业营业利润率比较 (2010-2016)**

Comparison of the operating profit margins of the sub-industry of the listed tourism companies (2010-2016)



Data source: Wind Data



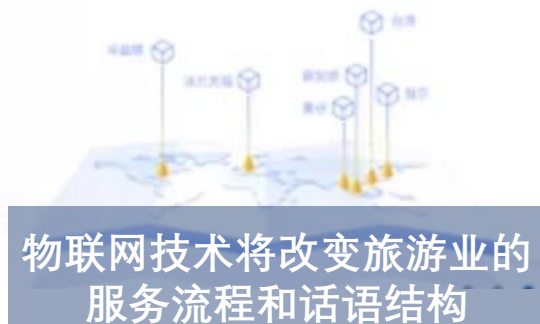
# Section IX

Eight technologies changing global tourism development

八大科技即将改变全球旅游发展趋势



- Artificial intelligence - increases the operational efficiency of tourism
- VR/AR technology - tourism will be one of the main sectors for application
- Blockchains - will change the payment system, credit system and service system of tourism
- Human-computer interaction techniques – will affect the tourist industry development in many ways
- New energy revolution – effectively supports the sustainable development of tourism
- GIS technology – enables a scientific approach to tourism analysis and service delivery
- The Internet of Things - will change the service processes and structure of tourism communications and distribution
- Cloud computing - enhances the digital management and digital marketing of tourism





# Section X

Tourism faces challenges of human capital

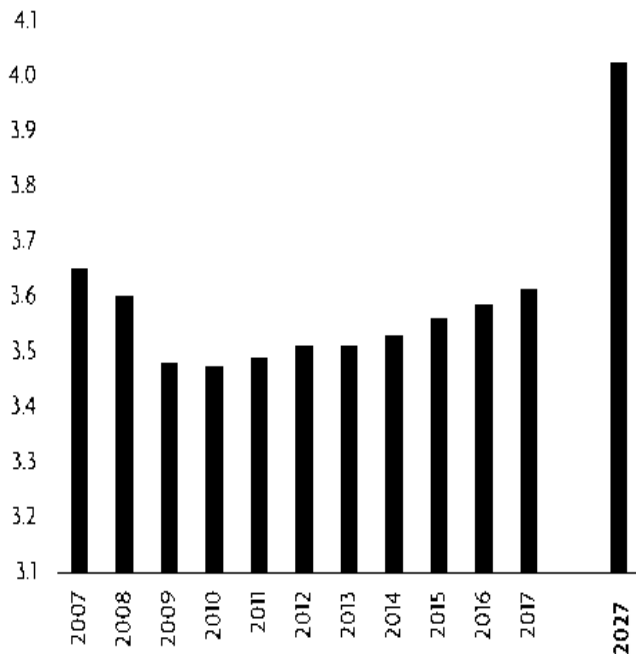
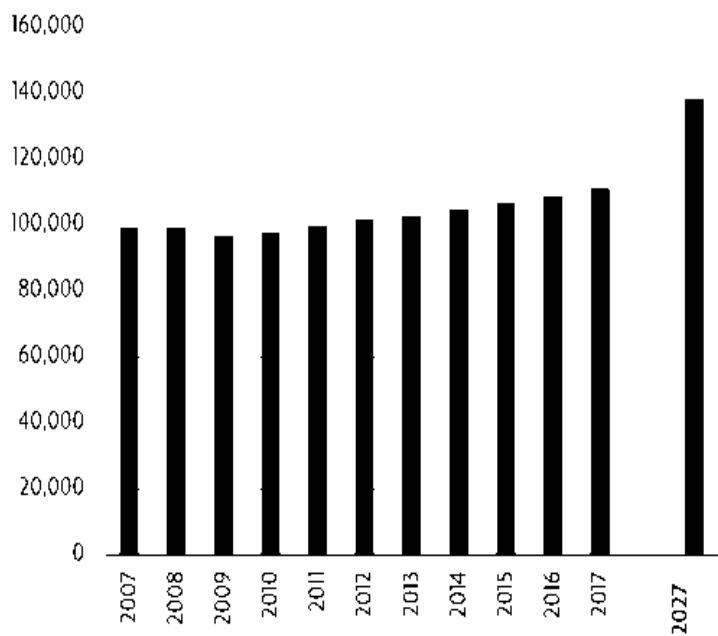
**旅游业面临人力资本方面的新挑战**

# 旅游行业的人力资本缺口较大

The gap of tourism in human capital is large

- 旅游行业创造的直接就业岗位及在总就业中占比趋势

Trend of the ratio of the created direct jobs in the tourist industry to the total jobs



WTTC所分析的46个国家中，37个国家在未来十年将出现旅游业人才“不足”或“短缺”的现象，而只有6个国家会在其整体经济中发生这种情况。

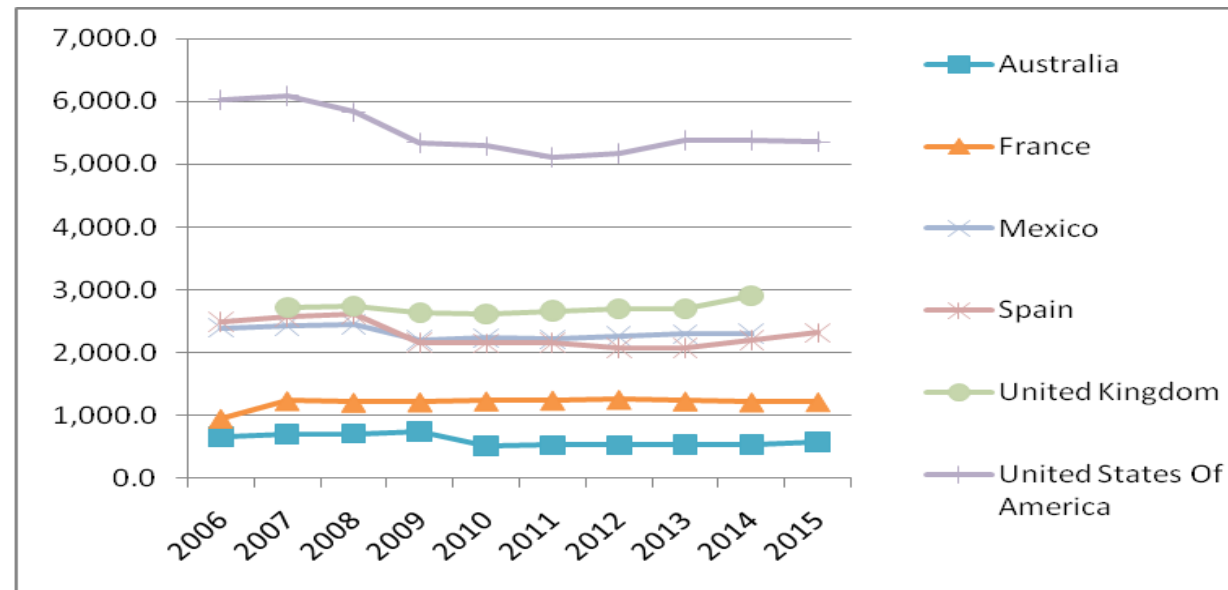
Data source: TRAVEL & TOURISM ECONOMIC IMPACT 2017 WORLD, WTTC

# 全球主要国家旅游从业人员增长与行业增长颇不相称

The growth of the people employed in tourism of major countries of the world does not match the growth of the industry

- 旅游行业从业人员总人数（千人）

Employees in tourism industry (thousand)



## 高端管理和技术人才较为缺乏

High-end management and technology talents are insufficient

- 旅游业已开始由劳动密集型向资本密集型和技术密集型转变，需要具有高技能、新思维的高端管理和技术人才

Tourism has started to change from a labor-intensive industry into a capital-intensive and technology-intensive tourism. The transformation needs high-end management and technology talents with high-level skills and new thinking.

- 新技术的出现以及在旅游行业中的渗透，旅游行业高端技术人才缺口较大

As new technologies appear and they penetrate the tourist industry, the demand of tourism for high-end technical talents will be very high and the gap in this aspect will be large

- 客户对旅游服务的需求日益呈现多样化和定制化，旅游管理人员需要更广泛的管理能力和业务能力

Because the demands of customers for tourist services are increasingly diversified and customized, the future tourist management personnel need more extensive management abilities and business liability.

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## 旅游行业从业人员流动性较高

The mobility of the people working in tourism is high

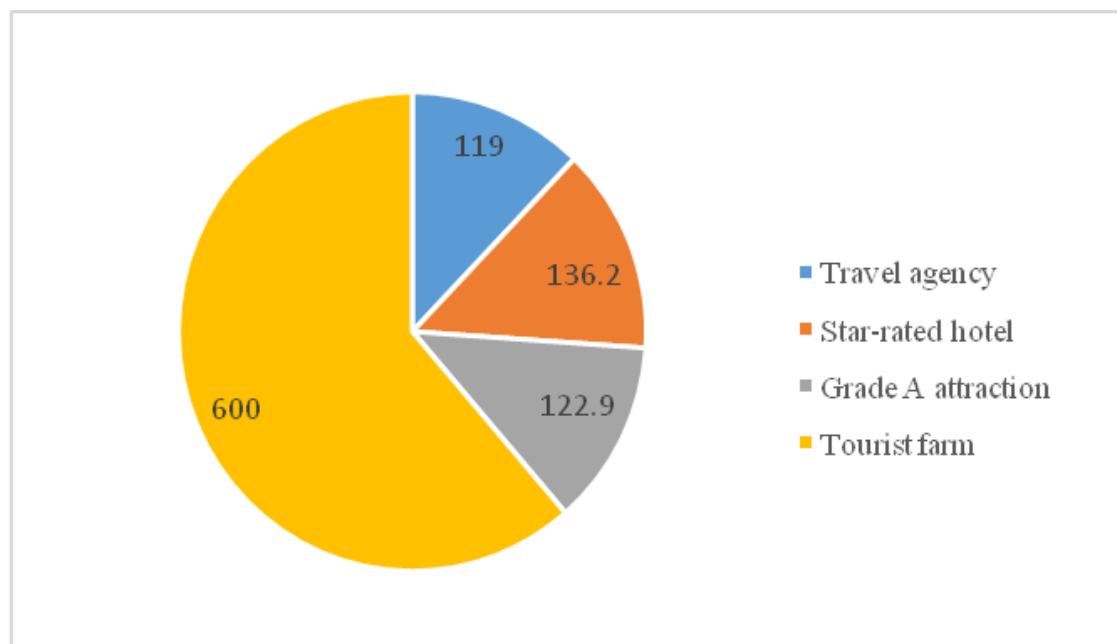
- 全球旅游业普遍面临着员工流失率高和人才向其他行业转移的问题。根据WTTC对其会员企业的调查，旅游行业的员工流动率的变化范围是从3%到36%，年度平均值为18%。非技术工人、销售和客户服务岗位，以及那些熟练工种的员工流动率最高。

The global tourism industry is facing the problems of high staff turnover rate and the talents moving toward other industries. WTTC data suggests that the employee turnover rate of the tourism industry is between 3-36% p.a. with average of 18%. The turnover rates of the non-technical workers, salespersons and customer service staff are the highest.

# 人力资源从传统旅游产业向新型旅游产业转移

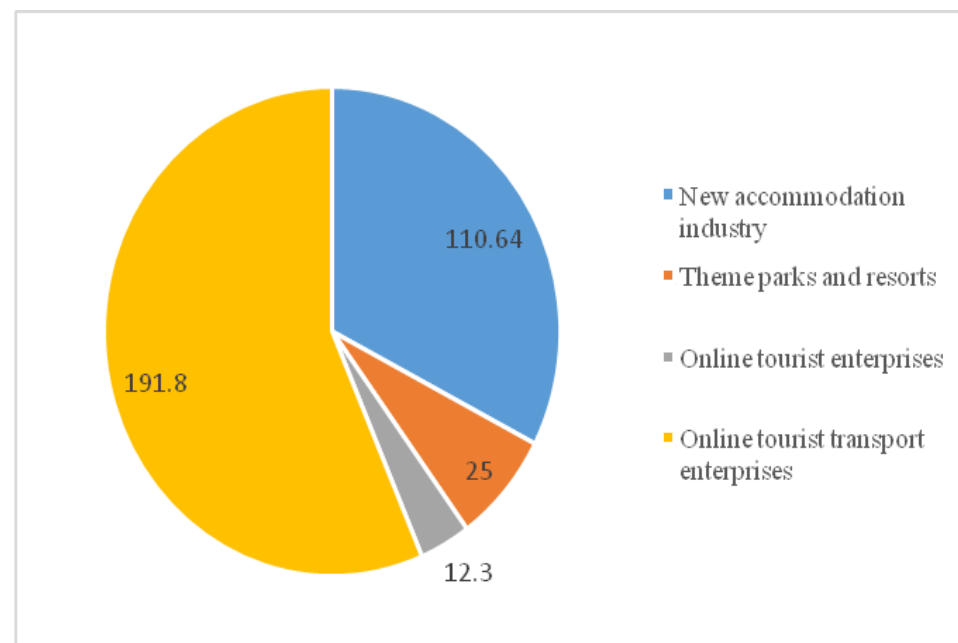
Human resources flow from the traditional tourist industry to the new tourist industry

- 中国旅游传统核心产业从业人员分布（单位：万人）



Distribution of the employees of the traditional Chinese tourist core industry (10,000)

- 中国旅游新型旅游产业从业人员分布（单位：万人）



Distribution of the employees of the new Chinese tourist industry (10,000)



I	Comprehensive and fast growth of the global tourism economy 全球旅游经济全面、快速增长
II	The evolving balance of the global tourism tripartite pattern 全球旅游三足鼎立格局更趋明显
III	The faster growth of tourism in emerging economies 新兴经济体旅游业增速更快
IV	The outstanding tourism development of BRICS countries 金砖国家旅游发展引人注目
V	Growth of tourism in relation to global trade 旅游促进全球贸易增长
VI	Rapid growth of global tourism investment 全球旅游投资持续增长
VII	Cities' important roles in the global tourism economy 城市在全球旅游经济中发挥重要作用
VIII	Good growth momentum of listed tourism companies 全球旅游上市公司增长与同期主要资本市场基本一致
IX	Eight major technologies changing the global tourism development trends 八大科技即将改变全球旅游发展趋势
X	The challenges of human capital for tourism 旅游业面临人力资本方面的新挑战

# Data Sources

## 数据来源

	Time period and source	Time period and source	
<b>Domestic tourist arrivals</b> 国内旅游人次	2005—2015: UNWTO	2016-2018	Tourism Research Centre, Chinese Academy of Social Sciences
<b>International tourist arrivals</b> 国际旅游人次	1995—2015: UNWTO	2016-2018	
<b>Domestic tourist revenue</b> 国内旅游收入	1995—2016: WTTC	2017-2018	
<b>International tourist revenue</b> 国际旅游收入	1995—2015: UNWTO	2016-2018	

THANKS FOR YOUR ATTENTION

