



中山大學
SUN YAT-SEN UNIVERSITY

旅游产业的供需变化
与桂林旅游业的发展与创新
Changes in Supply and Demand
Development and Innovation of Guilin Tourism Industry

保继刚

Bao Jigang

中山大学旅游学院

School of Tourism Management, Sun Yat-sen University



感谢桂林市委市政府的决策!

Great appreciation to the government of Guilin!

2021年10月论坛提出要拆除遮挡象鼻山的篱笆, 2022年元旦就实现了

The proposal of opening Xiangbishi was raised in Oct 2021 during the forum, and very soon opened in January 2022



引言 Introduction

将桂林旅游业发展置于**旅游产业供需变化**的背景中考察二者关系：

Examining the relationship between the Development of Guilin's Tourism Industry and Changes in Tourism Supply and Demand within the following context:

- 旅游供需关系的变化在不同阶段分别体现为何种特征
Investigating the distinct characteristics that changes in the tourism supply and demand relationship exhibit at different stages.
- 桂林旅游业是否对这些变化做出了合适的响应
Assessing whether Guilin's tourism industry has made appropriate responses to these changes.
- 这些响应是否推动了桂林旅游业的发展与创新
Determining whether these responses have propelled the development and innovation of Guilin's tourism industry or not.

桂林旅游业对旅游供需关系变化的响应

THE RESPONSES OF GUILIN'S TOURISM INDUSTRY TO
CHANGES IN THE TOURISM SUPPLY AND DEMAND
RELATIONSHIP

桂林旅游业对旅游供需关系变化的响应 The Responses of Guilin's Tourism Industry to Changes in the Tourism Supply and Demand Relationship

改革开放至今，旅游供需关系的主要矛盾经历了数次转换。

Since the Reform and Opening-up, the primary contradiction within the tourism supply and demand relationship has undergone several transformations:

1978-1988

1989-1998

1999-2012

2013-Now

**观光旅游
主导阶段**

Sightseeing
Tourism prevailed

**旅游供需
多元化阶段**

Diversification of
Tourism Supply and
Demand

**旅游
日常化阶段**

Routinization of
Tourism

**旅游供给侧改革
阶段**

Tourism Supply-
Side Reform

桂林旅游业对旅游供需关系变化的响应 The Responses of Guilin's Tourism Industry to Changes in the Tourism Supply and Demand Relationship

观光旅游主导阶段 (1978-1988)

Sightseeing Tourism (1978-1988)

旅游供需关系变化的整体特征——需求:

Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Demand:

- 赚取外汇为主要目标大力发展入境旅游，还是1985年提出“从只抓国际旅游转为国际、国内一起抓”，团队观光都是最主要的旅游需求，且呈现快速增长态势。

In the pursuit of earning foreign exchange as a primary goal, there was a strong focus on developing inbound tourism. In 1985, the concept of “shifting from exclusively focusing on international tourism to simultaneously promoting both international and domestic tourism” was proposed. Group sightseeing tours became the major form of tourism demand and exhibited a rapid growth trend.

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旅游供需关系变化的整体特征——供给:

Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Supply:

- 由于缺乏发展基础，“旅游地少、路难行、车难搭、住宿难”的问题突出。

Due to a lack of development infrastructure, the issues of “limited tourist destinations, challenging transportation, difficulty in securing transportation, and accommodation shortages” were particularly prominent.

- 桂林山水甲天下，来到桂林住地下。

Guilin's picturesque landscapes are renowned far and wide, yet once in Guilin, you might find accommodation to be somewhat scarce.

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Sightseeing Tourism (1978-1988)

- 旅游供需关系变化对桂林旅游业的核心挑战:

The Core Challenges of Changes in the Tourism Supply and Demand Relationship for Guilin's Tourism Industry:

- 极度缺乏建设资金的情况下，如何选择最有吸引力的观光旅游资源进行开发并配套相应设施就成了关键现实问题。

Due to the extreme lack of construction funds, the critical practical question revolved around how to choose the most attractive sightseeing resources for development and provide the necessary facilities.

- 必须要有合适的发展战略来指导旅游投资建设，让有限资金发挥最大效益。

Developing an appropriate development strategy was essential to guide tourism investment and construction, ensuring that limited funds yield maximum benefits.

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旅游开发的基本特征及其对供需变化的响应:

The Fundamental Characteristics of Tourism Development and Their Response to Supply and Demand Changes:



三山二洞一条江

住宿设施建设

“Three Mountains, Two Caves, and One River”: Focus on the construction of accommodation facilities.



回答了哪些资源应优先开发的问题;

Which resources should be prioritized for development?

提供基本的住宿设施

providing essential accommodation facilities.

桂林旅游快速发展的物质基础

The Resources Foundation of Development of Tourism in Guilin

世界级的资源禀赋及比较优势

World-class Natural Resources and Comparative Advantages.



Lijiang River

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Diversification of Tourism Supply and Demand (1989-1998)

旅游供需关系变化的整体特征——需求：

Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Demand:

- 国内旅游需求日益旺盛。团队观光旅游仍是主流，但需求多样化突显。

Domestic tourism demand had been steadily increasing. Group sightseeing tours remain the mainstream, but diversified demand had been becoming more pronounced.

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旅游供需关系变化的整体特征——供给：

Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Supply:

- 资金不再是旅游开发的制约因素，旅游投资热情高涨，观光旅游资源开发逐渐从最顶级资源往次一级资源转移，其他类型的旅游资源开发也日益增加，资本驱动型旅游吸引物不断涌现。

Funding was no longer a limiting factor in tourism development. There was a strong surge in tourism investment enthusiasm, and the development of sightseeing resources was gradually shifting from the top-tier resources to the next level. Other types of tourism resource development were also on the rise, and capital-driven tourism attractions were continually emerging.

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Diversification of Tourism Supply and Demand (1989-1998)

- 桂林机场1991年9月立项，1993年7月开工，1996年10月1日建成通航

Guilin Airport was approved in September 1991, construction began in July 1993, and it was officially opened for operation on October 1, 1996.

- 熊虎山庄1993年开业，桂阳公路上的鳄鱼王、蛇大王景区，未增强桂林的旅游吸引力。

The Xionghu Resort opened its doors in 1993, while attractions like the “Crocodile King” and “Snake King” along the Guilin-Yangshuo Highway did not significantly enhance Guilin’s tourist appeal.

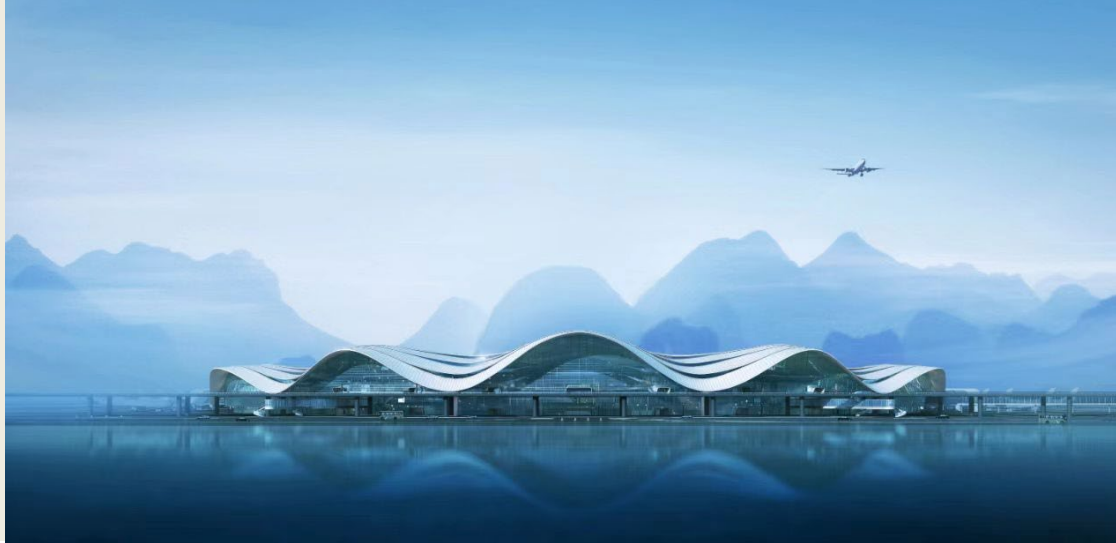
- 愚自乐园1996年筹划，1998年开业，曲高和寡

The Yuzile Paradise was planned in 1996 and opened in 1998, but it faced limited popularity.

- 依然靠桂林山水观光游吸引物，缺乏全国意义的主题公园、旅游度假区

Guilin still primarily relies on its natural scenic beauty for tourism attraction, lacking nationally significant theme parks or tourist resorts.

Guilin Airport



Yuzile Paradise (Clubmed)



Xionghu Resort



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旅游日常化阶段 (1999-2012)

Routinization of Tourism (1992-2012)

- 1999年以来，旅游越来越成为中国居民日常休闲活动的一部分（原因：国民收入；社会心态；假日制度改革；现代交通）

Since 1999, tourism had increasingly become a part of the daily leisure activities of Chinese residents. This trend could be attributed to rising national income, evolving societal attitudes, changes in holiday systems, and advancements in modern transportation.

- 大众旅游的“散客化”趋势越来越明显，高端消费不断涌现，奢侈度假、出境旅游日渐频繁。

The trend towards “independent travel” within mass tourism has become more evident, and high-end consumption continues to grow. Luxury vacations and outbound travel are becoming more frequent.

旅游供需关系变化的整体特征——供给 Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Supply:

旅游日常化阶段 (1999-2012)

Routinization of Tourism (1992-2012)

- 非观光型旅游地得到充分的发展机会（大城市周边游项目、乡村旅游越来越盛行）；
Non-sightseeing tourism destinations had been granted ample development opportunities, especially in the vicinity of major cities and the increasing prevalence of rural tourism.
- 出现了一批广受游客认可的精品化大众旅游产品，这些产品推动了旅游供给的提质升级（如乌镇东栅、《印象·刘三姐》、长隆欢乐世界等）；
A range of popular and high-quality mass tourism products have emerged, driving an overall enhancement of tourism supply. Examples included Wuzhen East Scenic Zone, “Impression: Liu Sanjie”, Chimelong Paradise, and others.
- 高端奢侈消费涌现并供给加速（“旅游+地产”、第二居所、高端度假区和度假酒店）。
High-end and luxury consumption is on the rise, with a proliferation of offerings such as “tourism + real estate”, second homes, high-end resorts, and vacation hotels.

旅游供需关系变化的整体特征——供给 Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Supply:

旅游日常化阶段 (1999-2012)

Routinization of Tourism (1992-2012)

- 《桂林旅游发展总体规划（2000-2020年）》，2000年11月评审完成；
桂林市旅游发展总体规划(修编)，2008年完成

Guilin Tourism Development Master Plan (2000-2020) completed its evaluation in November 2000, while the *Guilin City Tourism Development Master Plan (Revision)* was finalized in 2008.

- 乐满地主题公园度假区，2000年12月25日开业

The Lemandi Theme Park Resort Area opened on December 25, 2000.

- 阳朔西街整治，1999年开始

The renovation of Yangshuo West Street commenced in 1999.

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旅游日常化阶段 (1999-2012)

Routinization of Tourism (1992-2012)

- 市区两江四湖整治，1998年8月23日启动，2002年6月2日正式通航
The transformation of the city's two rivers and four lakes began on August 23, 1998, and officially opened for navigation on June 2, 2002.
- 《印象·刘三姐》2004年3月20日正式公演
“Impression: Liu Sanjie” debuted on March 20, 2004.
- 全球首个世界旅游组织观测点落户阳朔，2005年
The first-ever UNWTO Sustainable Tourism Observatory was established in Yangshuo in 2005.
- 联合国世界旅游组织/亚太旅游协会旅游趋势与展望国际论坛从2007年起永久落户桂林

The UNWTO/PATA Forum on Tourism Trends and Outlook made Guilin its permanent home in 2007.

1999年10月启动

Initiated in Oct. 1999;

2000年6月中期研讨

The mid-term review in Jun. 2000;

2000年8月补充调查

Supplementary surveys in Aug. 2000;

2000年11月完成

Completed in Nov. 2000.



桂林旅游业发展周期

The Periods of the Development of Guilin's Tourism Industry

- 桂林市旅游业发展至今，大致经历了初创期、发展期、停滞巩固期，进入二次发展期

The development of Guilin's tourism industry can be roughly divided into four periods: the initial stage, the development stage, a period of stagnation and consolidation, and a second phase of development.

- **桂林旅游业的社会文化效益**
- **Social and Cultural Benefits of Guilin's Tourism Industry**
 - 宣传效益：塑造桂林形象
 - Publicity and Promotional Advantages: Shaping Guilin's Image.



阳朔西街整治及国际化

The Renovation of Yangshuo West Street and Its Internationalization



Foreign tourists helped to rebuild the West Street



The West Street, Yangshuo, 1999



阳朔西街现象——国际化的典范

The Phenomena in Yangshuo West Street: Models of Internationalization

市场理性消费、商家诚信经营、主客关系融洽、商业秩序与休闲氛围俱佳

Rational consumer behavior in the market, honest business operations, harmonious host-guest relationships, and a favorable commercial environment with a leisurely atmosphere.



印象刘三姐、两江四湖

“Impression: Liu Sanjie” & Two Rivers and Four Lakes



全球首个世界旅游组织旅游可持续发展观测点

The First UNWTO Sustainable Tourism Observatory

- 2005年成为全球首个联合国世界旅游组织旅游可持续发展观测点，被UNWTO专家称为“社区旅游可持续发展的典型范例”。

The first UNWTO Sustainable Tourism Observatory was established in 2005, recognized by UNWTO experts as a “typical example of community tourism sustainable development.”



联合国世界旅游组织/亚太旅游协会旅游趋势与展望国际论坛 从2007年起永久落户桂林

The UNWTO/PATA Forum on Tourism Trends and Outlook made Guilin its permanent home in 2007.



战略目标 Strategic Goals

- 战略目标：“世界级、桂林化”的国际一流旅游城市

Strategic Goals: The First-Class International Tourist City in World-Level and with Guilin's Characteristics.

- 桂林市旅游的定位 Guilin's Tourism Positioning

- 在国民经济和社会生活的地位：重要的主导产业

In the national economy and social life: A significant leading industry.

- 在全国旅游市场中的定位：国内、海外的游客市场并重，全国最重要的旅游目的地之一。

In the national tourism market: Focused on both domestic and international tourist markets, regarded as one of the most important tourist destinations in the country.

- 游客市场定位：观光、度假、会议

Tourist market focus: Sightseeing, leisure, and conferences.

- 目的地定位：国际旅游观光、度假和会议中心

Destination positioning: An international tourism destination emphasizing sightseeing, leisure, and conference facilities.

桂林旅游发展战略的主要任务

Primary Goals of Guilin's Tourism Development Strategy

- 桂林旅游业发展一方面是具有预期总游客数的增加（以预期游客绝对数量做指标）的乐观前景，另一方面又面临旅游业的效益下降、逐渐丧失相对优势（以国际游客市场份额的下降和旅游业的低效益做指标）的危机

A two-fold challenge: on one hand, there is the optimistic prospect of an expected increase in the total number of tourists (measured by the absolute number of expected tourists). On the other hand, there is the crisis of diminishing benefits and the gradual loss of relative advantages in the tourism industry (measured by the decrease in the market share of international tourists and the industry's low efficiency).

- 桂林市旅游业发展战略研究中面临的主要任务是：抓住预期总游客数的增加的机遇，提高旅游业的效益和竞争力，实现旅游业持续的、高效的发展

The main tasks: to seize the opportunity of the expected increase in the total number of tourists, enhance the efficiency and competitiveness of the tourism industry, and achieve sustainable and efficient development in the tourism sector.

主导战略措施

Key Strategic Measures

战略措施 Strategic Measures

- 减少低劣景点和扶持高质量旅游产品开发

Reducing underperforming attractions and supporting the development of high-quality tourism products.

- 保护和提升桂林市旅游的品牌：漓江黄金水道

Protecting and enhancing Guilin's tourism brand with a focus on the Lijiang River Golden Waterway.

- 建设和完善桂林城市旅游的战略（主要增长点）

Constructing and improving strategic aspects of urban tourism in Guilin (major growth point).

- 塑造友好、安全、方便、个性的桂林（新的增长点）

Shaping Guilin to be a friendly, safe, convenient, and personalized destination (new growth points).

- 旅游可持续发展战略

Tourism sustainable development strategy.

- 理顺各种关系，促进旅游发展：政府、企业、社区

Streamlining various relationships to promote tourism development, including government, enterprises, and communities

战略措施 Strategic Measures

- 机构能力建设的战略思想

Strategic thinking on enhancing institutional capacity.

- 旅游产业提升的战略

Strategies for the advancement of the tourism industry.

- 实施以IT为核心的旅游科技战略

Implementing an IT-centered tourism technology strategy.

- 培育现代企业、重视中小企业的战略

Nurturing modern enterprises and emphasizing the importance of small and medium-sized enterprises.

- 丰富桂林旅游形象，树立“桂林不只山水甲天下”的新桂林形象

Enriching the image of Guilin tourism and establishing a new image that reflects “Guilin is more than just the most picturesque landscape all over China.”

桂林城市旅游发展定位

Guilin Urban Tourism Development Positioning

建设一流的国际化旅游城市 Establishing a Premier International Tourism City:

- 从世界的角度看，是世界级的山水城

From a global perspective, Guilin is a world-class city of scenic beauty.

- 对本地的父老来说，是绿色的家园

For its local residents, Guilin is a green and environmentally sustainable home.

桂林成为国际化旅游城市的可能 The Feasibility of Guilin Becoming an International Tourism City:

- 城市旅游职能的国际化 Internationalization of urban tourism functions.
- 旅游服务功能的国际化 Internationalization of tourism service functions.
- 城市自然环境达到国际优质标准 International standards for the city's natural environment.
- 城市环境舒适度 A high level of urban comfort
- 安全性 Safety
- 为散客提供尽可能多的便利服务 Maximum convenience for independent travelers.
- 人文特色有潜力可挖 Unearthing the untapped potential of Guilin's cultural uniqueness.

桂林市旅游发展总体规划(修编)

Guilin City Tourism Development Master Plan (Revision)

—评审汇报稿—

The Edition for Report and Review

中山大学旅游发展与规划研究中心

Centre for Tourism Planning and Research, Sun Yat-sen University

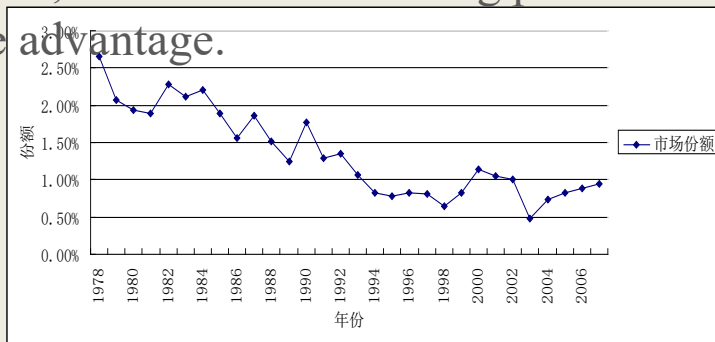
二〇〇八年十二月 December 2008



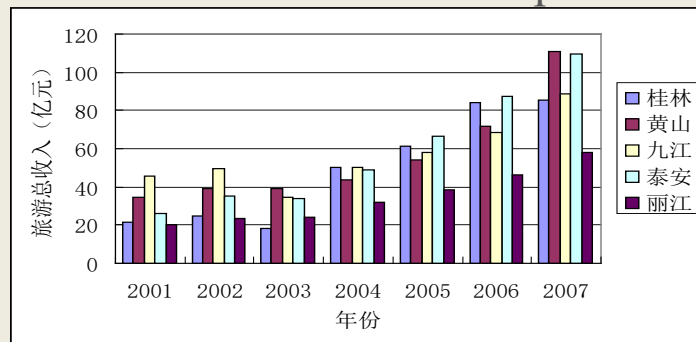
桂林旅游地位判断-1 The Position of Guilin's Tourism

在全国旅游市场中的地位 Position in the National Tourism Market

- ◆ 从国际旅游创汇、国内旅游收入及游客人均创造的旅游收入判断，桂林市处于同类城市中较高水平。 Guilin exhibits a relatively high level among cities of its kind in terms of international tourism earnings, domestic tourism revenue, and per capita tourist spending.
- ◆ 桂林在全国入境旅游市场中的比重整体呈下降趋势。 The proportion of Guilin in the national inbound tourism market is declining overall.
- ◆ 桂林市的国内旅游处于第一梯队位置，但并不具备明显的领先优势。 In the domestic tourism sector, Guilin holds a leading position within the first tier but doesn't possess a distinct competitive advantage.



桂林入境旅游市场在全国所占市场份额变动情况



近年来主要同类城市(地区)旅游总收入比较图

桂林市旅游资源分析-1 Analysis of Guilin's Tourism Resources

上一轮规划 (1999年) 后的变化情况 The Changes since the Last Planning (1999)

- ◆ 中心城区“两江四湖”游憩商务区的形成，极大提升了城市旅游资源质量和品级；
The formation of the “Two Rivers and Four Lakes” recreation and business district in the city center has significantly enhanced the quality and grade of urban tourism resources.
- ◆ 乡村生态环境、传统村落民居及农业旅游资源异军突起；
Rural ecological environments, traditional village dwellings, and agricultural tourism resources have seen remarkable growth.
- ◆ 非物质文化遗产及事件活动成为重要旅游吸引物（如：印象·刘三姐、梦幻漓江、龙脊魂）；
Intangible cultural heritage and event activities have become significant tourist attractions (e.g., “Impression: Liu Sanjie”, “Dreamlike Lijiang River”, “Dragon’s Backbone Soul”).
- ◆ 竞争型旅游资源的引导地位进一步凸现。The leading position of competitive tourism resources has become more pronounced.

那些区位条件好、开发潜力强并能转化为高质量旅游产品的资源

Resources that possess favorable location conditions, strong development potential, and the ability to be transformed into high-quality tourism products.

桂林再发展面临的前景与任务 The Prospects and Tasks for the Re-development of Guilin

- ❁ **前景：**桂林依然是中国旅游的缩影。桂林二次增长期后进入停滞增长阶段，常规增长难以再上新台阶。新机遇、新契机背景下，强有力的外界和政策干预，进一步整合资源、调整旅游产品结构、推进客源市场转型、提升旅游形象、改革旅游管理体制将实现桂林旅游发展的再次飞跃。 Guilin remains a microcosm of tourism in China. After entering a period of stagnant growth following its second growth phase, conventional growth is challenging to achieve. In the backdrop of new opportunities and circumstances, strong external interventions and policy measures, further resource consolidation, adjustment of tourism product structures, transformation of source markets, enhancement of the tourism image, and reform of the tourism management system will lead to a renewed leap in Guilin's tourism development.
- ❁ **任务：**旅游的增长更多是效益和质量的提升。即：不仅要扩大旅游业的规模，更要提高桂林旅游的社会、经济和环境效益，充分发挥旅游业的主导产业的作用，促进桂林社会和国民经济发展。 The growth of tourism is more about improving benefits and quality. In other words, the goal is not only to expand the scale of the tourism industry but also to enhance the social, economic, and environmental benefits of Guilin's tourism, fully harnessing the leading role of the tourism industry to promote social and economic development in Guilin.

目标定位 Positioning the Goals of Tourism

- ◆ **在桂林国民经济和社会生活的定位：**桂林市重要的主导产业，深刻影响桂林社会、经济 and 环境的各个方面； In Guilin's National Economy and Social Life: Guilin's tourism industry serves as a significant leading sector, profoundly impacting various aspects of Guilin's society, economy, and environment.
- ◆ **在全国旅游市场中的定位：**全国最重要的综合型旅游目的地及旅游综合改革实验地；全国最优秀的旅游城市； In the National Tourism Market: Guilin is positioned as one of the most crucial comprehensive tourist destinations and an experimental hub for comprehensive tourism reforms in the country. It's also recognized as one of China's finest tourist cities.
- ◆ **在国际旅游市场中的定位：**国际旅游观光、度假和会议奖励旅游目的地；连接东盟旅游区和大中华旅游区的组织中心和门户。 In the International Tourism Market: On the international stage, Guilin is positioned as a destination for international tourism, sightseeing, holidays, and conferences. It serves as a reward for travelers and connects the ASEAN tourism area with Greater China, acting as an organizational hub and gateway.

桂林旅游业对旅游供需关系变化的响应 The Responses of Guilin's Tourism Industry to Changes in the Tourism Supply and Demand Relationship

改革开放至今，旅游供需关系的主要矛盾经历了数次转换。

Since the Reform and Opening-up, the primary contradiction within the tourism supply and demand relationship has undergone several transformations:

1978-1988

1989-1998

1999-2012

2013-Now

**观光旅游
主导阶段**

Sightseeing
Tourism prevailed

**旅游供需
多元化阶段**

Diversification of
Tourism Supply and
Demand

**旅游
日常化阶段**

Routinization of
Tourism

**旅游供给侧改革
阶段**

Tourism Supply-
Side Reform

旅游供需关系变化的整体特征——供给 Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Supply:

旅游供给侧改革阶段 (2013至今)

Tourism Supply-Side Reform (2013-Now)

- 八项规定压缩了泡沫需求，推动了市场正常化，奢侈性需求让渡给更多的平民化需求，有预算的消费开始增长。

The “Eight Regulations” have reduced speculative demand, promoting market to develop rationally. Luxurious demand has shifted towards more mass-market demand, leading to increased spending among budget-conscious consumers.

- 但同时，大众消费品位的升级使其品质追求更高，游客越来越愿意为旅游中的舒适性付费。

However, the upgrading of mass consumption has raised their quality standards, making tourists more willing to pay for comfort during their travels.

旅游供需关系变化的整体特征——供给 Overall Characteristics of Changes in the Tourism Supply and Demand Relationship — Supply:

旅游供给侧改革阶段 (2013至今) Tourism Supply-Side Reform (2013-Now)

- 供给侧结构性短缺和结构性过剩并存的问题：旅游业的提质升级与资本出海。

Challenges of structural shortages and excess coexist in the supply-side: Upgrading tourism quality and capital outflows.

- 国内国际双循环：旅游业的一带一路倡议、新全球化和双循环。

Dual Circulation of Domestic and International Sectors: Tourism's role in the Belt and Road Initiative, new globalization, and the dual circulation strategy.

- “旅游事业”的回归：旅游休闲的公共属性，强化公共产品供给和公共服务完善的“旅游事业”。

The Return of “Tourism Enterprise”: Emphasis on the public nature of tourism and the enhancement of public product supply and public service in the “tourism enterprise”.

- 旅游产业与国家战略的紧密结合：旅游在国家乡村振兴、新型城镇化、一带一路建设中，成为了国家引导资本有序流动、各类要素合理布局、实现乡村地区脱贫致富和共同富裕的重要手段。

Close Integration of Tourism Industry with National Strategy: Tourism plays a pivotal role in national initiatives such as rural revitalization, new urbanization, and the Belt and Road construction, facilitating the orderly flow of capital, rational distribution of resources, and the realization of poverty alleviation and shared prosperity in rural areas.

桂林旅游业对旅游供需关系变化的响应 The Responses of Guilin's Tourism Industry to Changes in the Tourism Supply and Demand Relationship

旅游供给侧改革阶段 (2013至今) Tourism Supply-Side Reform (2013-Now)

- 城市功能没有提升，被南宁超过。

No improvements in urban functions; surpassed by Nanning

- 资源保护和气候非优，旅游度假产品竞争力低；也没有出现“旅游+地产”泡沫

Resource protection and unfavorable climatic conditions have reduced the competitiveness of tourism and vacation products. The region has not experienced a “tourism + real estate” bubble.

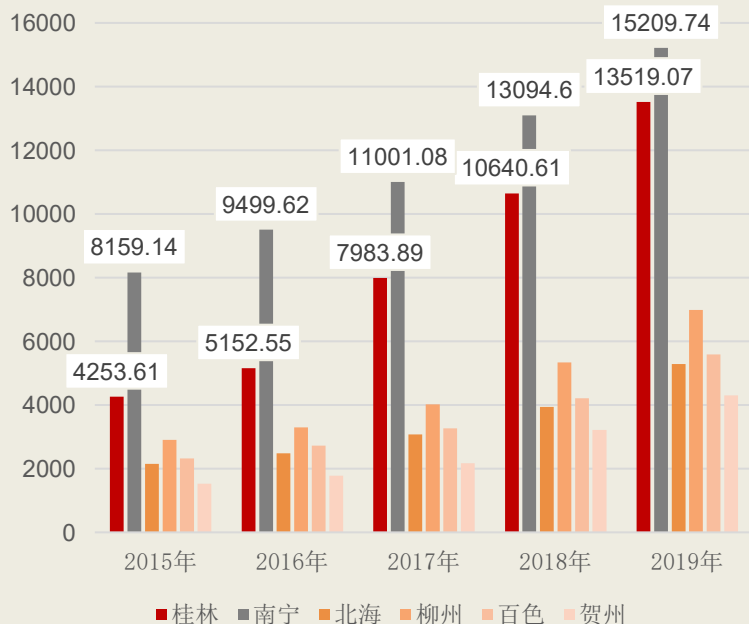
- 缺少现象级产品及事件。2016年东西巷改造达不到现象级。

A lack of standout products and events.

城市功能与城市旅游 Urban Functions and Urban Tourism

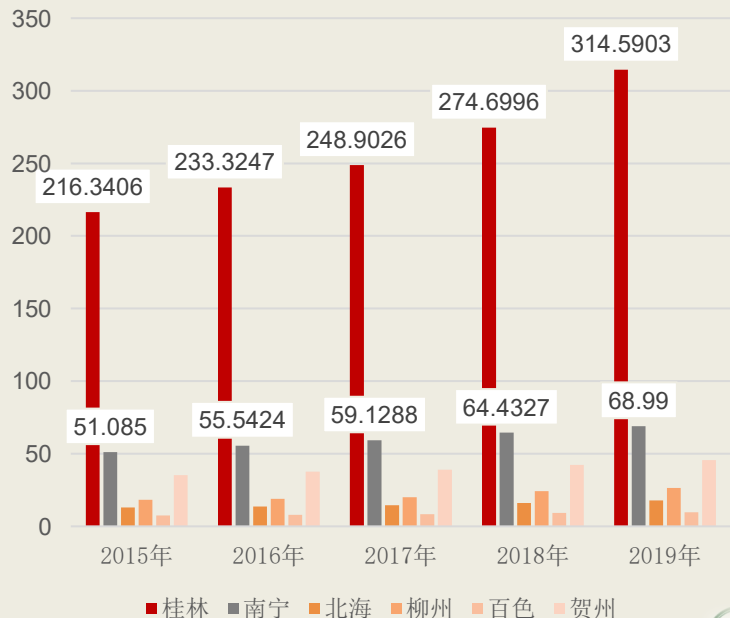
广西壮族自治区内主要城市对比 Comparison of major cities of Guangxi Province

2015-2019年 广西主要城市国内游客
(万人次)



数据来源：广西统计年鉴

2015-2019年广西主要城市入境游客
(万人次)



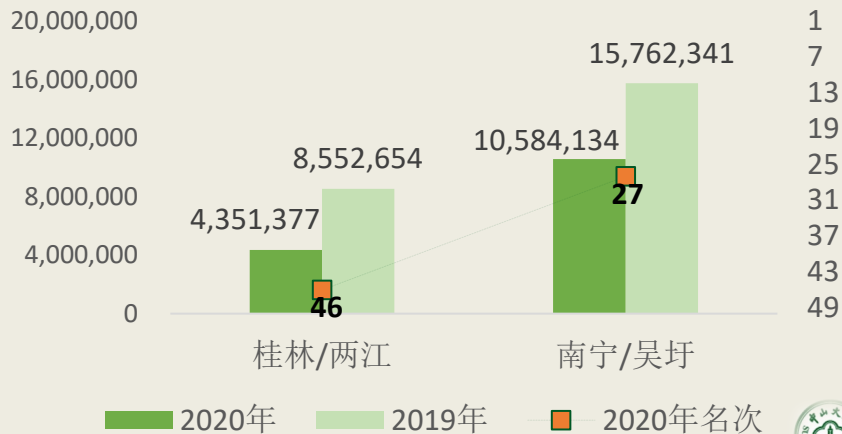
城市功能与城市旅游 Urban Functions and Urban Tourism

城市功能比较 Comparison of functions of cities

- 城市在旅游中扮演包括中转站、目的地、客源地等多种角色，交通功能是城市功能重要的体现方式。尽管桂林的旅游资源优于南宁，但南宁承担了更综合的区域功能。

Cities play various roles in tourism, including transits, destinations, and tourist sources, and transportation functions are important manifestations of urban functions. Although Guilin has better tourism resources than Nanning, Nanning undertakes more comprehensive regional functions.

| 城市 | 国务院批复的城市定位 |
|----|---|
| 桂林 | 国际性风景旅游城市，国家及历史文化名城，中国山水城市，桂北及周边地区区域性中心城市。 《桂林市城市总体规划(2010-2020年)》 |
| 南宁 | 广西壮族自治区首府，北部湾经济区中心城市，我国西南地区连接出海通道的综合交通枢纽。 《南宁市城市总体规划(2011-2020年)》 |



数据来源：2020年民航生产统计年报

城市旅游对比 Comparison of Urban Tourism

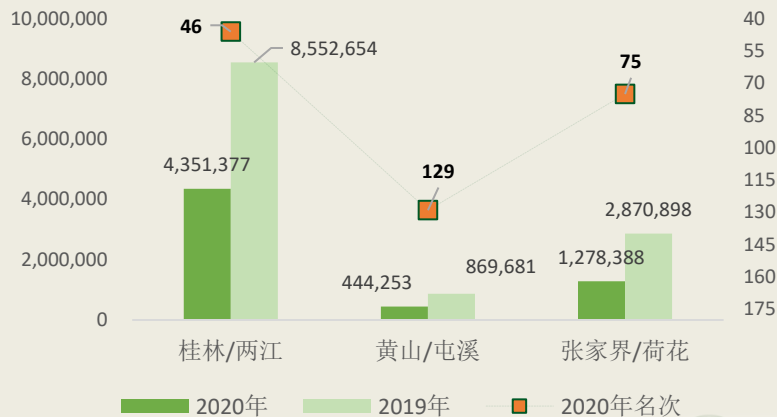
城市定位比较 Comparison of positioning

- 《桂林国际旅游胜地建设发展规划纲要》（2012-2020）

<Outline of the Development Plan for the Construction of Guilin International Tourist Destination>

- 世界一流的旅游目的地；全国生态文明建设示范区；全国旅游创新发展先行区；区域性文化旅游中心和国际交流的重要平台 A world-class tourist destination; National Demonstration Zone for Ecological Civilization Construction; National Tourism Innovation and Development Pilot Zone; Regional cultural tourism centers and important platforms for international exchanges

| 城市 | 国务院批复的城市定位 |
|-----|---|
| 桂林 | 国际性风景旅游城市，国家及历史文化名城，中国山水城市，桂北及周边地区区域性中心城市。 《桂林市城市总体规划(2010-2020年)》 |
| 黄山 | 现代国际旅游城市；自然与文化遗产资源集聚地；皖浙赣交界区域中心城市。《黄山市城市总体规划(2008-2030)(2018年修改)》 |
| 张家界 | 国际风景旅游城市。 《张家界市城市总体规划(2007-2030年)》 |



数据来源：2020年民航生产统计年报

展望 PROSPECTS

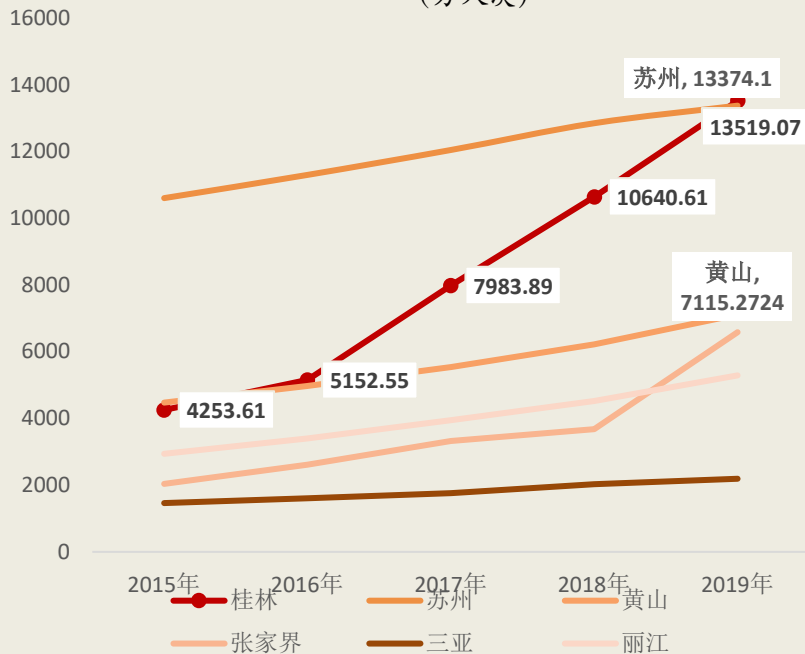
未来发展的思考 Thinking for the Future

- 发挥国际化优势，建成世界级旅游目的地，成为疫情之后吸引国际游客的先锋区
Leverage internationalization advantages to establish a world-class tourist destination, becoming a pioneer region in attracting international tourists after the pandemic.
- 发挥阳朔、龙胜社区旅游优势，打造旅游带动乡村振兴的样板区
Capitalize on the community-based tourism advantages in Yangshuo to create a model region for rural revitalization driven by tourism.
- 大数据赋能的先行区
To construct a pioneer zone for big data enablement.
- 旅游教育的国际典范：桂林旅游大学
The international model for tourism education: Guilin Tourism University

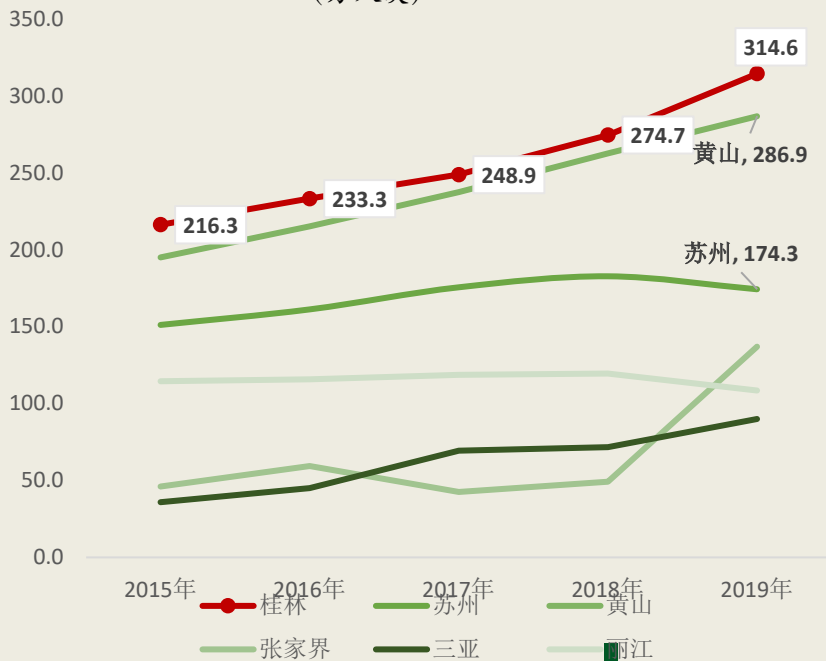


国内主要旅游城市对比 Comparison of China's Major Tourist Cities

2015-2019年 主要旅游城市国内游客
(万人次)



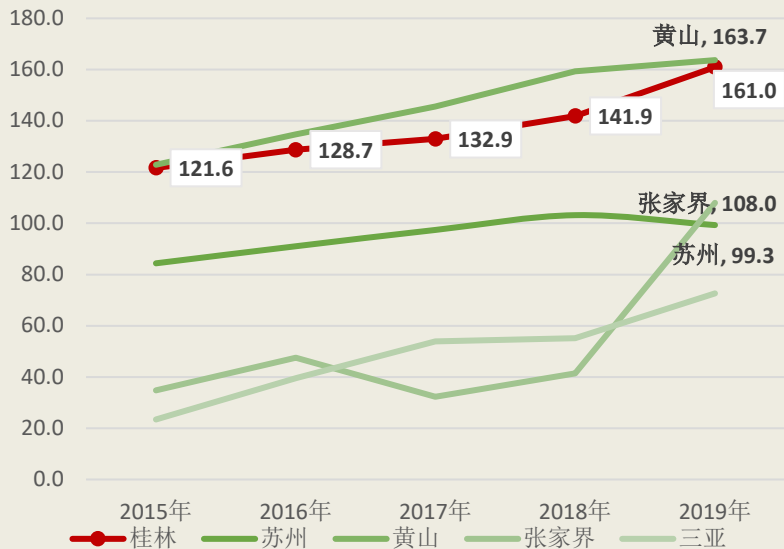
2015-2019年主要旅游城市入境游客
(万人次)



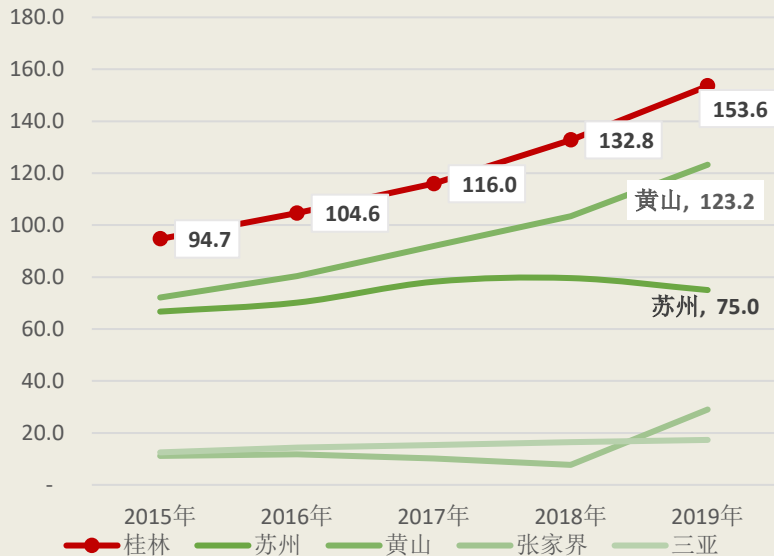


国内主要旅游城市对比 Comparison of China's Major Tourist Cities

2015-2019年主要旅游城市外国游客 (万人次)



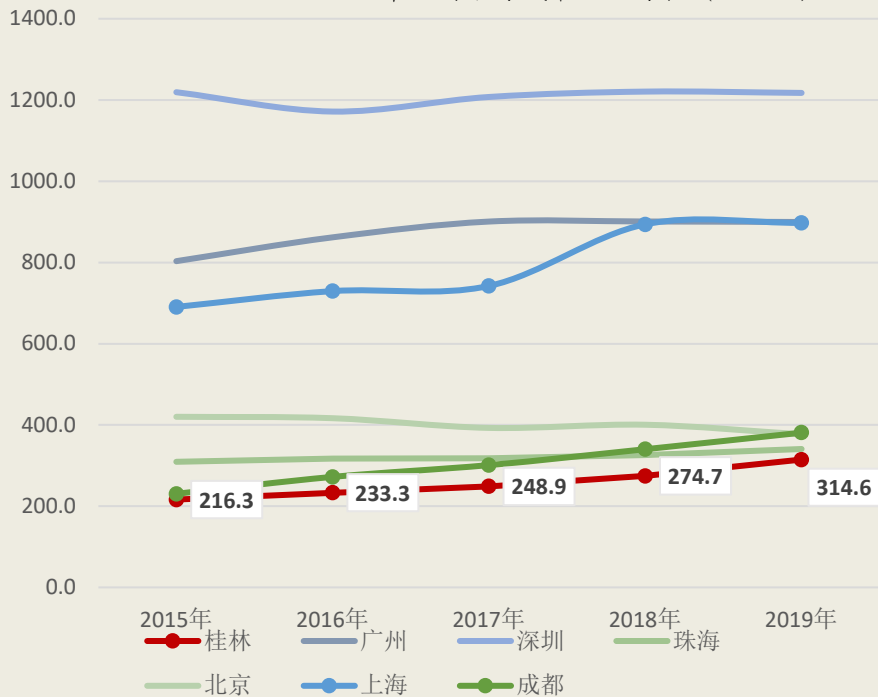
2015-2019年主要旅游城市港澳台游客 (万人次)





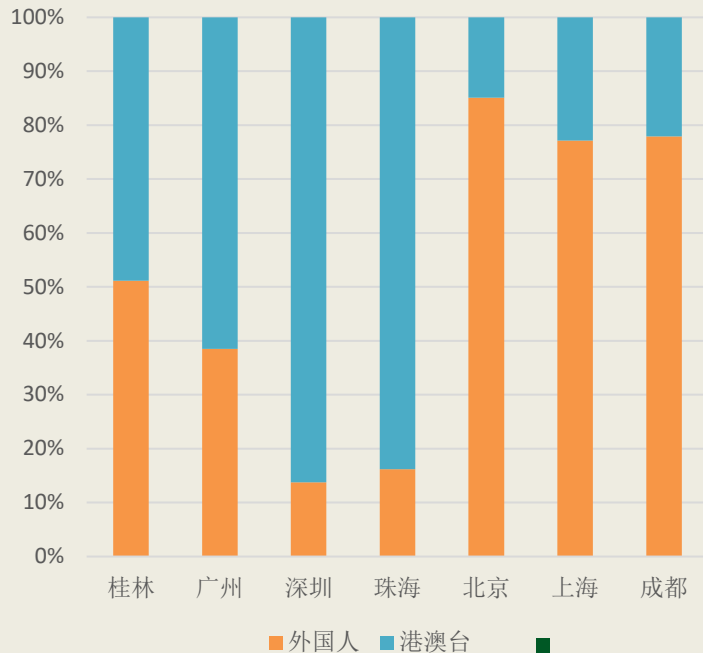
国内主要旅游城市对比 Comparison of China's Major Tourist Cities

2015-2019年主要旅游城市入境游客 (万人次)



2019年入境游客结构

The Proportion of International Tourists and Tourists from HK, Macau, and Taiwan in 2019



世界级旅游目的地的构成要素

The Components of a World-Class Tourist Destination

- **世界级的旅游吸引物体系**

A system of world-class tourist attractions.

- **国际化的旅游品牌建设**

The development of international tourism brands.

- **世界级的基础设施配套**

World-class infrastructure facilities.

- **精品化的旅游服务体系**

High-quality tourism service systems.

- **多元化的市场结构**

Diverse market structures.

- **世界级的消费引领**

Leading consumption trends at a global level.

- **包容化的社区参与**

Inclusive community involvement.

- **智慧化的综合管理**

Smart comprehensive management.

- **辐射化的区域带动**

Regional development and expansion.

桂林建设世界级旅游目的地的基础

- Attraction Foundation

世界级的资源禀赋与比较优势

World-class Natural Resources and Comparative Advantages



桂林建设世界级旅游目的地的基础

- 精神基础 Cultural Foundation

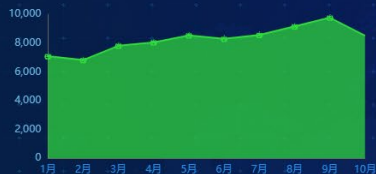
“以人为本”、和谐融洽的主客关系

A People-Centered Approach & A Harmonious and Cordial Host-Guest Relationship.



大数据赋能 The Big Data Enability

本年游客量趋势



当年累计游客 **82662.92** 万人天
同比上年 **123.33%** ↑

当月累计游客 **8522.17** 万人天
同比上年 **223.27%** ↑

本年游客画像



男性游客 **45199.85** 万人天 **54.7%**

女性游客 **37463.08** 万人天 **45.3%**

当前游客量

73.15 万人天

境内游客

71.7 万人天

入境游客

1.45 万人天



本年区内各地市游客量占比



本年热门酒店游客量排行

| 酒店 | 万人天 |
|-------------|------|
| 富丽华大酒店(北海) | 4.56 |
| 贵港国际大酒店(贵港) | 4.53 |
| 圣展酒店(南宁) | 9.24 |

本年热门景区游客量排行(万人天)

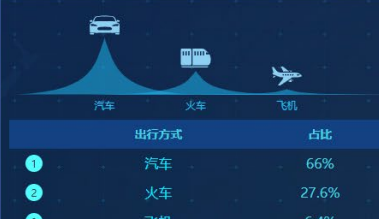
| | | | | | |
|-----------------|--------|--------|----------------|------------|--------|
| 1 FIRST LOREM | 北海银滩景区 | 328.4 | 2 SECOND LOREM | 青秀山风景旅游... | 311.53 |
| 3 THIRD LOREM | 涠洲岛 | 297.92 | 4 FOURTH LOREM | 桂林新区环城水... | 269.61 |
| 5 FIFTH LOREM | 阳朔西街景区 | 206.11 | 6 SIXTH LOREM | 会东·东博文化... | 203.06 |
| 7 SEVENTH LOREM | 南宁市动物园 | 199.11 | 8 EIGHTH LOREM | 桂林漓江景区 | 189.78 |

| 地市 | 南宁 | 桂林 | 贵港 | 柳州 | 百色 | 梧州 | 河池 | 玉林 | 崇左 | 来宾 | 贺州 | 钦州 | 北海 | 防城港 |
|-------------|-------|------|------|------|------|------|------|------|------|------|------|------|------|------|
| 当前游客量 (万人天) | 30.03 | 4.79 | 4.42 | 4.22 | 4.09 | 3.83 | 3.33 | 3.28 | 2.94 | 2.73 | 2.34 | 2.07 | 1.93 | 1.70 |

本年全国省级客源地游客量

| 排序 | 省份 | 万人天 | 占比 |
|----|----|---------|------|
| 10 | 重庆 | 1116.81 | 2.7% |
| 11 | 山东 | 1024.62 | 2.5% |
| 12 | 湖北 | 997.62 | 2.5% |
| 13 | 河北 | 985.78 | 2.4% |
| 14 | 福建 | 965.95 | 2.4% |
| 15 | 江西 | 813.47 | 2% |
| 16 | 安徽 | 708.44 | 1.7% |

本年度游客交通出行方式



桂林旅游大学 Guilin Tourism University



谢谢 / THANKS



eesbjg@mail.sysu.edu.cn