



中国旅游研究院(文化和旅游部数据中心)  
China Tourism Academy (Data Center of the Ministry of Culture and Tourism)

# 增长、变化与关注

## Growth, Changes and Concerns

——中国入出境旅游市场形势与政策展望  
—— The Situation and Policy Prospects of China's Inbound and Outbound Tourism Market

中国旅游研究院院长 戴斌  
DAI Bin, President of China Tourism Academy

2024年11月14日 阿斯塔纳  
November 14, 2024 Astana

01

# 作为生活方式的出境旅游与安全关注

Outbound Travel as a Lifestyle and Security Concerns



出境旅游市场得以快速复苏：2024年前三季度，中国出境旅游人数超过**9200**万人次，同比增长**48.1%**，恢复到2019年的**76.7%**；今年国庆节七天假期，出境旅游人数达到**267.7**万人次。

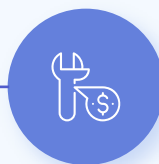
The outbound tourism market was fueled to recover: In the first three quarters of 2024, there were more than 92 million Chinese tourists travelling abroad, year on year growth of 48.1%, and reaches 76.7% of 2019 levels as recovery; China saw 2.677 million outbound trips during the 7-day National Day holiday this year.



香港和澳门地区的基础市场地位，以及**东南亚、东亚**近程旅游为主的市场格局没有改变。Tourists from Hong Kong and Macao still underlie Chinese tourism market, and Chinese tourists mainly choose Southeast Asia and East Asia for short-distance travels.



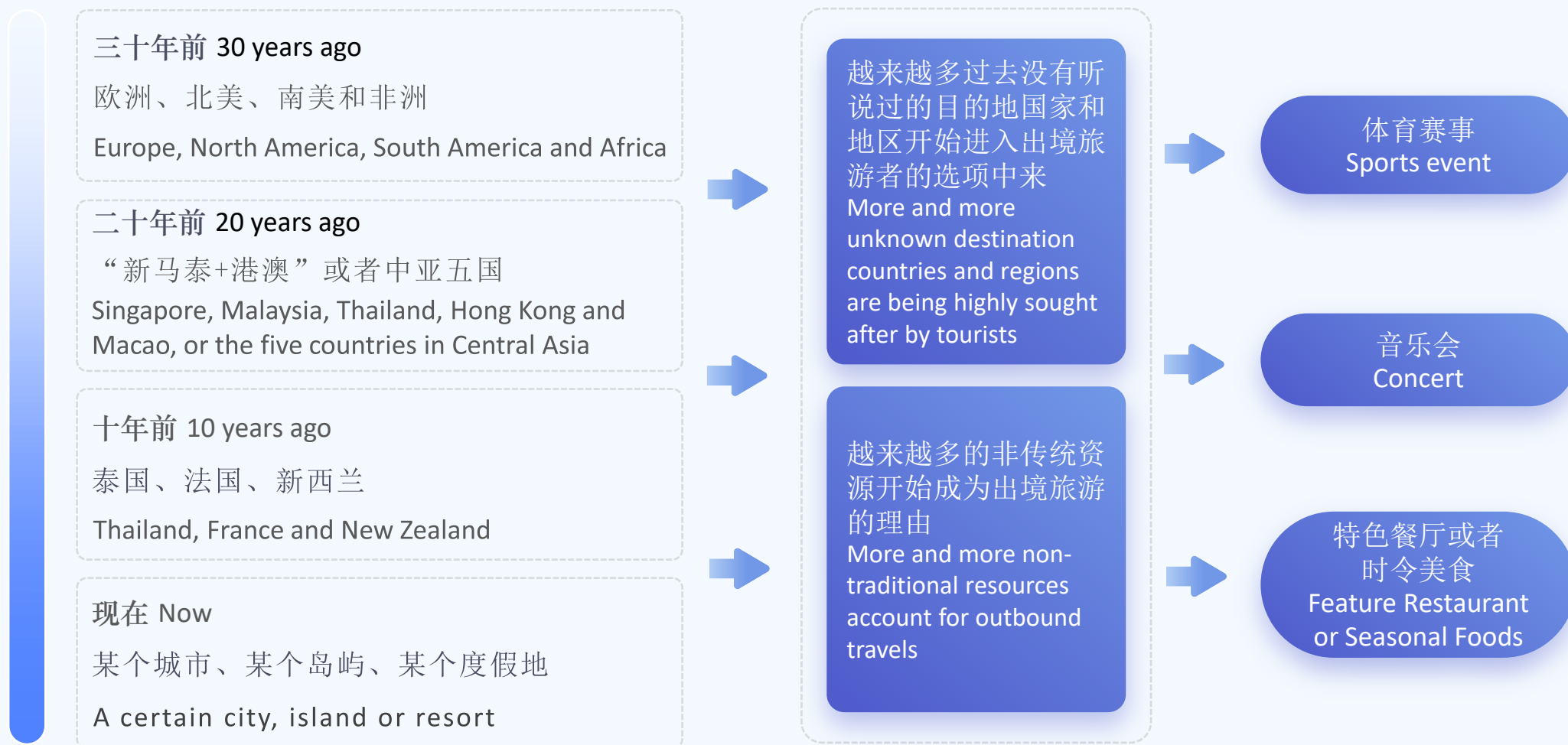
“一带一路”沿线国家目的地特别是西亚、北非地区明显增长。The BRI countries, especially West Asian and North African regions witnessed a notable increase in the number of tourists from China.




受地区冲突影响，欧美等远程市场的航空供应链和旅游市场增长恢复不尽如人意。Shocked by regional conflicts, long-distance destinations like Europe and US suffered slowdown in recovering their airline supply chains and tourism markets.

从出境旅游流向与流量来看，**个性需求**、**自助旅行**开始带动小众目的地国家和地区的成长。

In terms of outbound tourist flow and traffic, **personalized needs** and **self-guided travels** became the growth driver for niche destination countries and cities.





中国游客的消费行为  
Consumer Behaviors of  
Chinese Tourists

01

走走走 go go go

欧洲七天十国游的线路畅销不衰

Strong appetite for the 7-day travel route to ten countries

02

买买买 buy buy buy

中国游客被视为“行走的钱包”

Chinese tourists are hence known as a “walking wallet”

03

为美好生活付费 To pay for a good life

要住好一点的酒店，吃好一些的美食，参观博物馆、美术馆，观看高水平的文艺表演，希望发现一些小而精、小而美、小而暖的生活场景并深度体验之

Stay in a high-grade restaurant or taste delicious foods. We might visit a museum or an art gallery, or watch a high-level artist show, in hope to find some pretty, exquisite, and warm life scenes and deeply appreciate them

**预期：**基于宏观经济、市场政策和出游意愿等先行指标，2024年中国公民出境旅游市场将接近2019年水平，并对即将到来的2025年充满积极乐观的预期。

2019

**Expectation:** Based on leading indicators such as macroeconomics, market policies and willingness to travel, we expect the outbound tourism market for Chinese citizens in 2024 to be close to the 2019 level, and we are optimistic about the upcoming 2025.

2024



### 乐观预期和发展信心 Optimistic Expectations and Development Confidence

---

更加关注包括旅游在内的高品质生活的需要。

More and more people turn to pursue high-quality life including travel.



### 旅游行为和消费趋势 Travel Behaviors and Consumption Trends

---

针对性推出众产品，陪游客深度体验。

To deliver well-targeted products, and accompany tourists for the in-depth experience.



政府将不再追求在任何时候对任何国家都保持旅游贸易顺差，也不会轻易采取贸易和非贸易壁垒对出境旅游进行管制。

The government will no longer seek to maintain a tourism trade surplus with any country at any time, nor will it easily impose trade and non-trade barriers on outbound tourism.



### 安全和品质 Safety and quality

---

人身自由和财产安全的保障；安全之上是品质。

To safeguard tourists' personal and property security and their freedom; Above security is quality.

02

# 超预期增长的中国入境旅游与政策创新

Over-expected growth in Chinese inbound tourism and policy innovation





入境旅游一直都是中国旅游工作的重点，也是政策创新的发力点。



Inbound tourism remains as the priority of our tourism-related tasks, and we always keep it in mind when innovating policies.

中国已与**25**个国家实现了普通护照全面互免签证，对**25**个国家实行单方面免签入境，对**54**个国家实行72/144小时过境免签

China waived visa requirements for ordinary passport holders from 25 countries that did the same way, and unilaterally gave visa-free access for 25 countries, and 72/144-hour visa-free transit for 54 countries.

已经有**40**个国家的公民可直接免签入境，**32**个国家的公民可通过72/144小时过境免签入境。

Already, citizens of 40 countries can directly transit without a visa, and citizens of 32 countries can transit without visas for up to 72/144 hours in China.

“大额刷卡、小额扫码、现金兜底” **支付便利化**措施

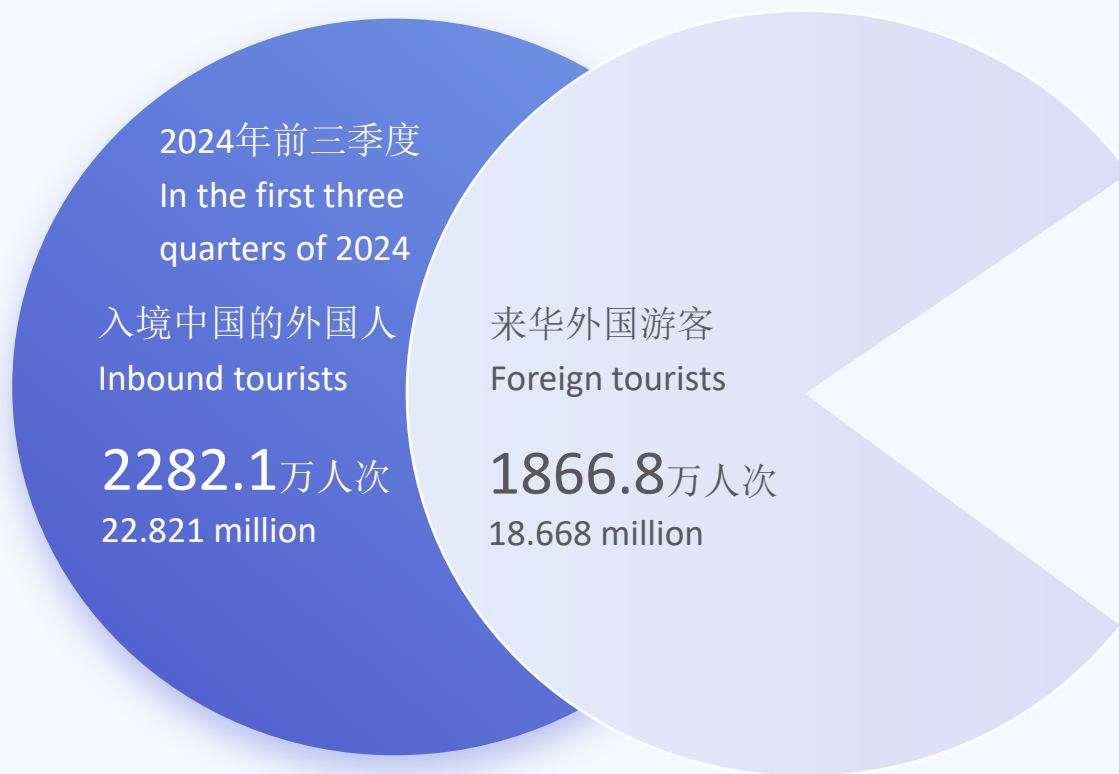
Payment facilitation measures, such as “bank cards for large value payment, QR codes for small value payment, and no refusal to accept cash”

积极推广“你好！中国”国家旅游**新形象**

Actively promote the new tourism image of “Hello China”

港澳居民入境基础市场更加稳固，外国人入境旅游市场实现了超预期增长，稳步进入了**快速复苏新阶段**。

The market of inbound tourists from Hong Kong and Macao is stabilizing, and that of foreign tourists has achieved over-expected growth and steadily entered a new stage of rapid recovery.



- 恢复到2019年同期的七成左右  
The tourism market has recovered about 70% of the level of the same period in 2019
- 从季度数据来看，同比和环比均实现了显著增长  
Looking at the quarterly data, we see dramatic growth both on a YoY and MoM/QoQ basis
- 下半年，外国人入境旅游市场有望恢复到2019年同期水平  
In the second half of the year, the inbound tourist market is expected to recover to the level of the same period in 2019 and step into a new cycle of prosperity

- 主客共享的美好生活新空间
- 多样化、个性化和品质化需求

- A new space for a better life shared by tourists and local residents
- The diversified, personalized and quality needs of inbound tourists



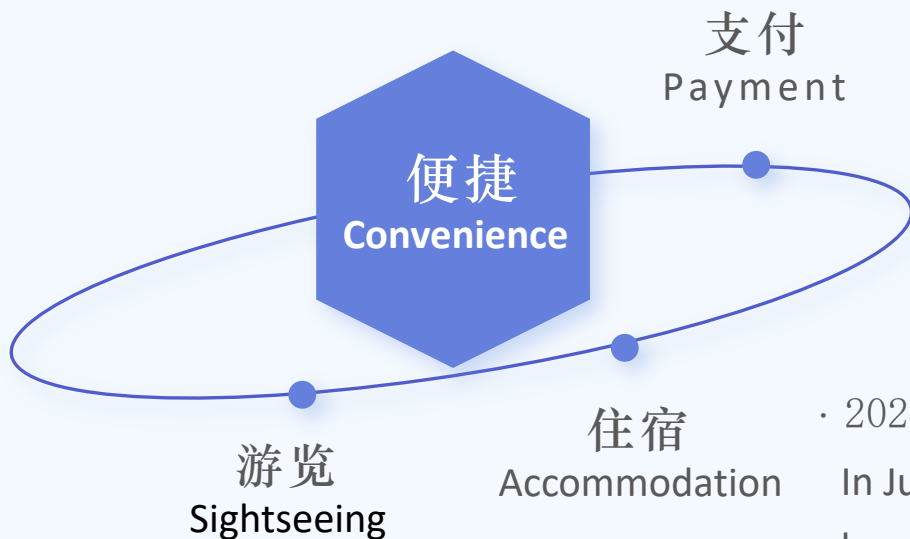
入境旅游散客化趋势愈加凸显

China has seen more and more individual inbound tourists



- 选择前往人流较少或费用较低的替代性目的地
- 哈萨克斯坦入境游客普遍选择非一线城市
- 更广泛地进入目的地的生活空间

- To go to the places with less flow of population and requiring lower costs
- Most tourists from Kazakhstan would choose non-Tier 1 cities
- To go in-depth into the living space of the native at a wider range



- 2024年3月：增加布设外币兑换业务网点和外卡刷卡设备  
In March, 2024: to increase the number of outlets providing foreign currency exchange services and overseas bank card swiping devices

- 2024年7月：不应以资质要求等为门槛限制住宿业经营者接待境外人员  
In July, 2024: simplifying access to hotel accommodations for overseas tourists by removing qualification and other barriers and enhancing services

- 提升景区门票、车（船）票预订购买、多语种服务等方面的便利度

To simplify booking and purchase of scenic spot tickets and bus (ship) tickets, and provide multilingual services,

03

# 当“你好！中国”遇见“非常棒”的哈萨克斯坦

“Hello China” vs. “Very Nice!” Kazakhstan


**1.7%** (2010-2019 中国公民首站赴哈萨克斯坦旅游增长率) From 2010 to 2019, average annual growth rate of the first stop for Chinese citizens to travel to Kazakhstan

**157,400**人次 (2019年中国公民首站赴哈萨克斯坦旅游人次) The trips were made by Chinese citizens as first stops to travel to Kazakhstan

**130**架次 (往来中哈两国的每月航班数) The number of flights between China and Kazakhstan per month


**53,600** 人次 (中国公民经乌鲁木齐国际机场口岸前往哈萨克斯坦人数) The number of Chinese citizens traveling to Kazakhstan through Urumqi International Airport

**1,000,000**人次 (2024年经霍尔果斯公路口岸出入境人员) In 2024, the number of people entering and leaving the Khorgos Highway Port



中哈两国一直互为重要的旅游目的地，也是恢复最快的旅游市场。2023年11月10日，中哈互免签证协定正式生效。

China and Kazakhstan are important tourist destinations and sources for each other, and the fastest to recover tourism. On November 10, 2023, Mutual Visa Exemption Agreement between China and Kazakhstan officially came into effect.



**211,600**人次 (2019年哈萨克斯坦访华人数) In 2019, the number of tourists from Kazakhstan to China

**38,500**人次 (哈萨克斯坦旅客持普通护照免签入境人数) The number of tourists from Kazakhstan entering China without visa with ordinary passports

# 旅游业高质量发展



High-quality Development of the Tourism Sector

● 1912年1月3日, January 3, 1992

● 2011年, 2011

● 2022年9月, 2022 September

中哈建交  
Establishment of diplomatic relations

全面战略伙伴关系  
Comprehensive strategic partnership

中哈命运共同体  
China-Kazakhstan community with shared future

中哈建立战略伙伴关系  
Establishment of a strategic partnership

永久全面战略伙伴关系  
Permanent comprehensive strategic partnership

● 2005年7月, 2005 May

● 2019年9月, 2019 September







- 希望更多的中国游客去哈萨克斯坦观光、休闲、度假，希望哈萨克斯坦政府和旅游业界能够为中国游客提供更高的安全和品质保障。

We hope to see more Chinese tourists going to Kazakhstan for sightseeing, entertainment and holiday break, and that the government and tourism industry of Kazakhstan will provide Chinese tourists with higher security and quality.

- 期待更多的哈萨克斯坦游客来中国多走走，体验一个传承文化创造为未来的中国，一个民族复兴、人民幸福的中国，一个开放包容、主客共享的中国。

We expect more tourists Kazakhstan will pay frequent visits to China, to experience our country which carries forward our culture, builds a bright future, seeks happiness for people, rejuvenates the nation, and offers an enjoyable experience for both hosts and guests with an open and inclusive mind.