

OUTLINE OF

OUTLINE OF THE 11TH FIVE-YEAR PLAN FOR CHINA TOURISM INDUSTRY



CHINA NATIONAL TOURISM ADMINISTRATION

THE 11TH
FIVE-YEAR PLAN
FOR CHINA
TOURISM INDUSTRY

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Contents

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Outline Of The 11th Five-Year Plan For China Tourism Industry

China National Tourism Administration

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Foreword

Objectives of building a well-off society in an all-round way have been set forth at the 16th National Congress of the Communist Party of China (NCCPC). Requirements of developing potentially high demand sectors such as culture, tourism and community services have been put forward further during the 5th session of 16th NCCPC. In the Outline of The 11th Five-Year Plan for National Economic and Social Development, promoting tourism industry and stimulating services consumption such as tourism consumption have been clearly identified. The 11th Five-Year Plan period is a critical phase in building a moderately prosperous society in all aspects. This period holds a historic position of building on the past and preparing for the future, it is confronted with both rare opportunities and severe challenges. China tourism industry must seize opportunities, confront challenges, aim at building China into a leading country in international tourism industry, play an important role as an important national economic sector, press on building a well-off society in a full-fledged way, form a harmonious society, draft and implement The 11th Five-Year Plan for China Tourism Industry.

Under the guidance of Deng Xiaoping's Theory and the important thought of "Three Represents", the drafting of The 11th Five-Year Plan for China Tourism Industry should comply with scientific concepts of development, stick to people-centered approach, carry forward reform and innovation, press on overall planning and coordination, adhere to marketization and industrialization, give a full play to the expanding internal demand-strategy implemented by the country for tourism industry, build a new socialist rural area, promote balanced development among regions, build a energy conservative and environmental friendly society, carry out international economical cooperation, promote building of a socialist harmonious society, expand communication and travel across the Straits, support the development of Hong Kong SAR and Macao SAR, promote balanced development among economy and society, rural and urban areas, eastern and mid-western regions, human and nature, domestic and international. The 11th Five-Year Plan shall focus on building a well-off society in a all-round way and the efforts should be



concentrated on tackling key problems confronted by China tourism industry, i. e. extensive mode of growth, lagging behind in law building, improving service quality, mismatching of overall capabilities of working crew, in order to improve competitiveness of the sector comprehensively in general and to push forward the sustainable, speedy, coordinated and healthy growth in particular to lay down a solid momentum of realizing the target of becoming a leading tourism country in the world in 2020.

The 11th Five-Year Plan for Tourism Industry should be in line with The National Economic and Social Development Plan. The Outline of the 11th Five-Year Plan for National Economic and Social Development has embodied the key issues that need to be dealt with during The 11th Five-Year period by tourism industry. Issues are “ promote domestic tourism comprehensively, develop inbound tourism actively, standardize outbound tourism, develop and protect tourism resources rationally, improve infrastructure, and press forward the building of key tourism regions and routes, regulate tourism market; further develop sightseeing tourism, promote leisure vacations, theme tourism packages such as scientific, agriculture, industrial and oceanic themes etc. , and to improve self-service tourism system; promote Red Tourism; accelerate reorganizations of tourism enterprises; encourage to develop characteristic tourism commodities.” The 11th Five-Year Tourism Development Plan, as a specific part of under The National Economic and Social Development Plan, underlines the following four aspects:

1. Objectives. Based on current tourism development situation, the overall goals during The 11th Five-Year Plan period for tourism development are to deepen institutional reform, shift growth mode, expand opening up, improve competitiveness of tourism sector through optimizing industrial structure to grow tourism into an important industry of national economy and to lay down momentum of building the China into a leading tourism country.
2. Focuses. Conduct overall planning for tourism development from the strategic point of view, incorporate The 11th Five-Year Guidance, study key issues regarding the industry development; investigate and solve problems concerning regional and specific program planning; underline implementation planning for important measures and issues.
3. Planning System. The planning, as been emphasized of being systematic, coordinated, and open, shall not only be in line with The National Economy and Social Development planning, but also to its best efforts stay in tune with the planning of specific programs in order to meet the requirements placed by and to provide an infrastructure

supporting the development of tourism industry. Based on the actual requirements raised during the development of tourism industry, The 11th Five-Year Plan is an open, deepening and consumer system which will follow up timely and enrich the planning system with any new issues and subjects arisen from the development of the industry during the planning period.

4. *Drafting Method.* Adhere to the principle of being based on facts, grasp the basic patterns of tourism industry development, absorb experiences from latest planning cases from all regions, draw on supports among all works of life, mobilize all departments to full extent to make the process of drafting into a process of drawing on collective wisdoms and integrating thoughts, which in turn will make The 11th Five-Year Plan into a action plan that directs the development of tourism industry and an important guidebook that guides the development of tourism on national as well as local level. *

Building China into a leading tourism country is the dream and pursuit of realizing great rejuvenation of the Chinese nation and it is an honorable mission entrusted to us by the era. The 11th Five-Year Plan period is ascending period of the national economic and social development and it is the critical phase in building a well-off society in an all-round way. World Tourism Organization and other nations in the world are holding a favorable view over the development of tourism in China because they have seen the fast social and economic development in China and the supports generated by the development environment of tourism industry. World tourism industry, which is developing, is looking forward to the contribution made by China. The key tune of building a well-off society in an all-round way calls for a strong note complemented by tourism industry. Supplying the industry with a strong pivot, China tourism industry will create a miracle for the development of world tourism industry.

Part One Development Situation

■ Chapter 1 Review of Development in Period of The 10th Five-Year Plan

■ Chapter 2 Opportunities and Challenges during The 11th Five-Year Plan

Chapter 1

Review Of Development In Period Of The 10th Five-Year Plan

China tourism industry rises along with the implementation of opening-up and reform. After nearly 30 years of development, China has established a fresh and bright reputation as a major tourism destination in the world and become a vigorous impetus of the world tourism development. In China, tourism plays an active role in construction of socialist economy, politics, culture and society, as well in international exchanges. Tourism has become a major industry in national economy and an important part of China's peaceful development and overall construction of a well-off society.

1. After basically completing take-off phase, China tourism industry enters a new phase of continuous and rapid growth

In the period of The 8th and 9th Five-Year Plans, China tourism industry went over preparatory phase for take-off, and in the period of The 10th Five-Year Plan, it striped across the phase of take-off. China tourism industry will be at a new phase of continuous and rapid growth in the period of The 11th Five-Year Plan. While further expanding at high speed, tourism industrial structure, product composition, and production quality, as well as tourism systematic structure will be progressively improved and perfected. Tourism, as a major industry of national economy, will play a greater role, hence become an important pillar of overall construction of a well-off society and a harmonious society.

2. Due to continuous growth of international tourism, China becomes a major tourism destination in the world

During The 10th Five-Year Plan, China inbound tourism grew at a much faster rate than

its surrounding competitors. In 2004, China inbound (overnight) arrivals and tourism receipts ranked 4th and 7th respectively in the world. In 2005, the number of inbound (overnight) arrivals reached to 46.81 million and generated tourism receipts of US \$29.3 billion. In the period of The 10th Five-Year Plan, outbound tourism of Chinese citizens became a hot spot of the world tourism. The approved destination statuses (ADS) which are granted by the State Council to Chinese citizens totaled 117 and 76 of them have been applied. In 2005, the total number of outbound tourists reached to 31.03 million. The development of outbound tourism has greatly enhanced China's reputation in the world tourism, effectively integrated with inbound tourism market and has established a well-ordered interactive pattern of inbound and outbound tourism.

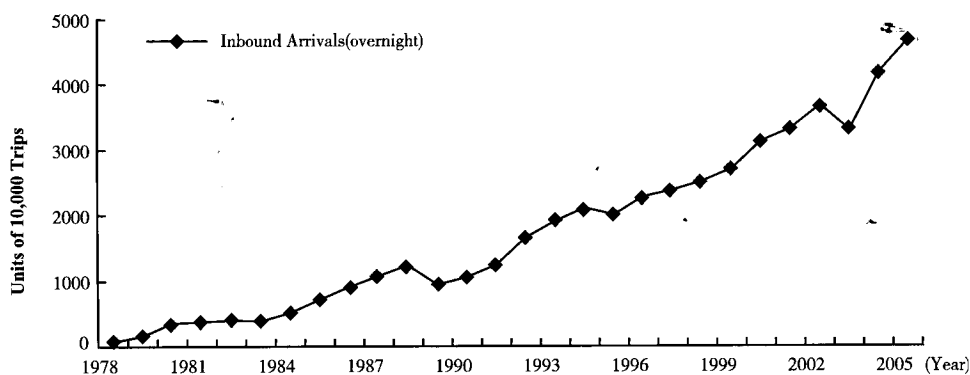


Fig. 1.1 Trend of Inbound Arrivals (overnight) in China

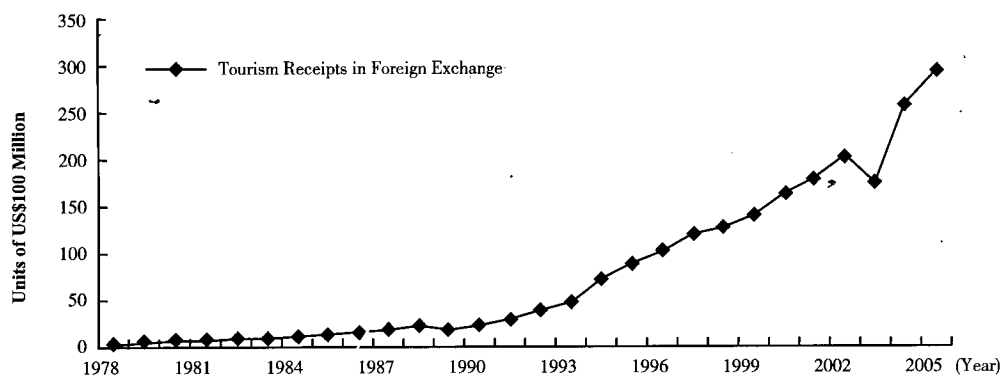


Fig. 1.2 Trend of Foreign Exchange Receipts from Tourism in China

3. Domestic tourism enters into a popular consumption stage and becomes a major part of the overall construction of harmonious society

In the period of The 10th Five-Year Plan, domestic tourism entered into a stage of popular consumption. In 2005, the average tourism rate of Chinese citizen reached to 92.67%, and the total number of domestic visitors was 1.21 billion person/time. Tourism has become part of Chinese people's daily life.

The pattern of common development of inbound tourism, domestic tourism and outbound tourism has greatly enhanced industry's capacity of resisting tourism risk and crisis, and gained an increasingly leveraged role for national economic development.

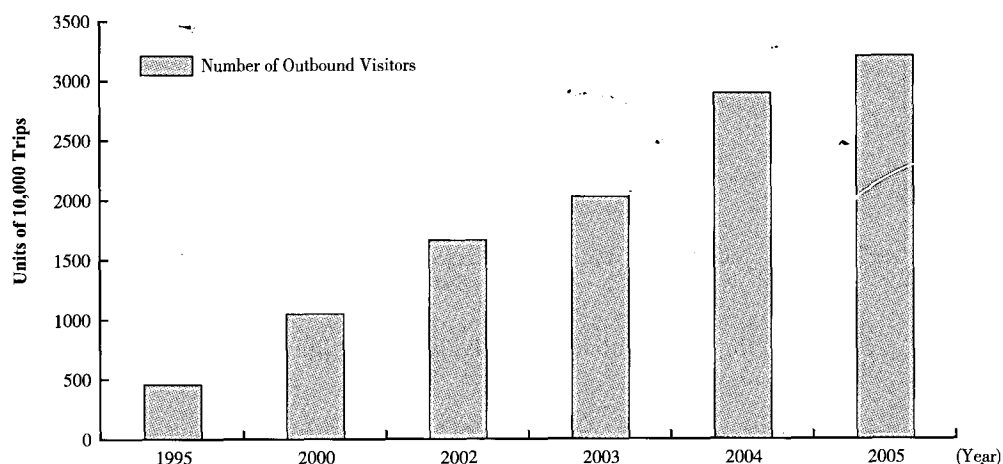


Fig. 1.3 Rapid Growth of Outbound Visitors in China

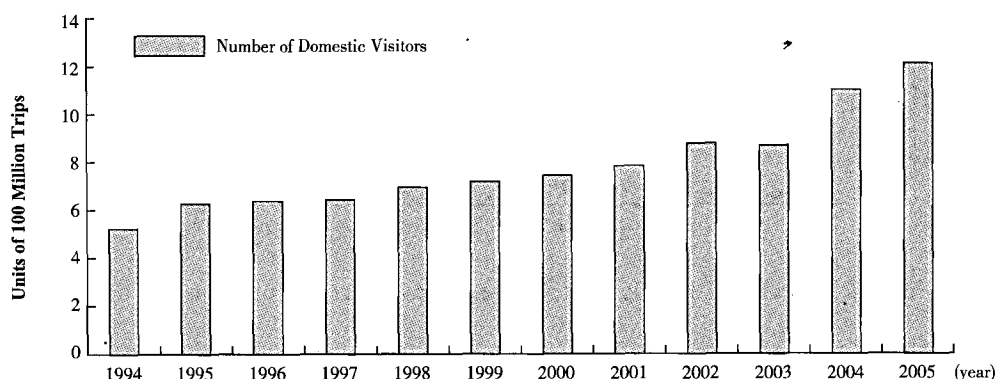


Fig. 1.4 Steady Growth of Domestic Visitors

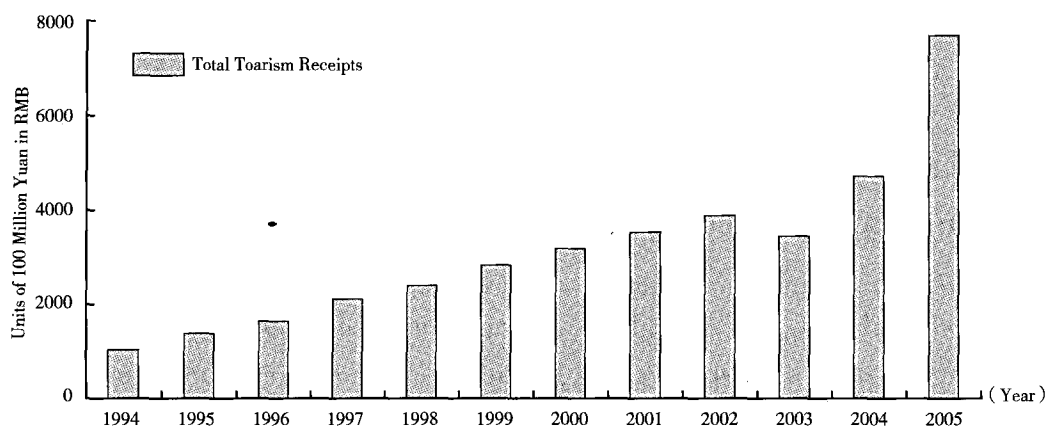


Fig. 1.5 Rapid Growth of Total Tourism Receipts in China

4. Industrial system gets improved and industrial competitiveness is intensified

As the result of development in the period of The 10th Five-Year, China has established a tourism industry with a huge scale and completed structure. Conditions of infrastructure, such as transportation and accommodation, are greatly improved. Tourism environment and service are much more satisfactory to tourist need. By the end of 2005, in China there were 10888 star-rated hotels, 14927 travel agencies, 2262 A-grade scenery spots, 539 industrial and agricultural Tourism Showcases, and 247 outstanding tourist towns and cities. Not only sightseeing products, China has developed vacation, leisure, and specialty products, also has built a product system mainly consisted of sightseeing tourism, resort and leisure tourism and specific tourism. A modern tourism industrial system with large scale, optimized structure and competitive strength has been formed up.

5. Increasing regional cooperation becomes an important direction in tourism development

After competing in scenery spots, tourist routes and cities, China tourism industry entered into a phase of regional cooperation in the period of The 10th Five-Year Plan. A metropolitan circle gradually evolved into a core of tourism development. Relying on big cities, regional tourism patterns with unique characteristics were established through the

country. Trans-regional tourism cooperation developed at an unprecedented high speed. Fast-growth of tourism were therefore promoted in the period of The 10th Five-Year Plan.

6. System reform constantly deepened and tourism administration system further-improved

In the period of The 10th Five Year Plan, the mechanism of government-guided industrial development was reinforced while various localities found and formed up different kinds of government-guided development pattern. “Golden Week” holiday coordinated mechanism, setting up China Outstanding Tourism City and other activities gained much efficiency, structure of tourism administration from national level to local level was established. In national tourism industry, the government implemented an effective and standardized administration by adopting the system of classification and qualification of relevant factors, so as to promote and guide tourism development in light of an effective criterion and norms.

7. Commitments to WTO fulfilled and opening-up steadily advanced

Tourism is the sector China first opened up to the outside world, and it is also an economic sector which attracts foreign investors at the earliest. Since implementation of reforms and Opening-up, FDI flow into the sector has reached to US \$ 93 billion. The world's top 10 hotel groups all conducted investment activities and managed hotels in China. In the period of The 10th Five-Year Plan, China fulfilled its commitment that foreign investors were allowed to hold controlling share in joint venture travel agencies and solely invested in travel agencies in China. At present, world's top 10 travel agencies and tourism groups from U.S.A, Japan, Germany, U.K, France, Australia, and some other countries has set up more than 10 of joint-venture or solely-invested travel agencies. Over 100 representative offices have operated in China. China has attracted a cluster of world's greatest tourism groups and become one of the most globalizing destinations.

8. Tourism became an important sector of national economy and its role as an accelerator to economic and social development gets more effective

Tourism is playing the role as an accelerator to national economic development. In

2005, total tourism receipts reached RMB768.6 billion, accounting for 4.22% of China's GDP. Tourism is also playing more and more active role by boosting and driving social employment growth. In 2005, employees directly involving in tourism was 7.49 million people and 37 million people indirectly. Thus, the total number of employees working in tourism reached 44.5 million, accounting for 5.2% of national total employment. Tourism also plays a major role in economic structural adjustment, shift of economic growth mode, and support for economic development in poor areas as well as environment improvement, inheritance and interchanges of traditional cultures. Tourism also functions actively in the affairs of China political diplomacy, economic cooperation and trade, and work with Hong Kong, Macau, and Taiwan.



Chapter 2

Opportunities And Challenges During The 11th Five-Year Plan

The period of The 11th Five-Year Plan is a critical era for China overall construction of a well-off society, and also an important phase for China to further promote tourism at a continuous high-speed way, and transform China from a big tourism country to a strong tourism nation. Tourism is faced with important opportunities for development and severe challenges.

1. Opportunities

1) Continuous growth of world economy provides a vast space for tourism development

In the next five years, continuous growth of world economy will ensure stable tourism market demand and supply. This will strongly support the continuous, fast, and healthy expansion of China tourism.

Table 2.1 GDP growth forecast of major industrialized countries.

Regions/countries	Growth Forecast(%)	
	2005 — 2010	2011 — 2025
Industrialized Countries(Average)	2.6	2.4
USA	3.2	2.8
Canada	3	2.5
Mexico	3.6	4.4
West Europe	2.2	2.1
UK	2.5	2.5
France	2.2	2.2
Germany	1.8	1.7

Source: International Energy Outlook, USA Energy Department (IE02004)

2) Global and regional cooperation is propitious to China tourism development

China's active participation in the process of globalization and regionalization is propitious to expanding its tourism market, lowering down tourism trading cost, and better playing its advantages, so as to help China tourism realize its goal of expansion in scale and advancement, as well as speed up its step toward a strong tourism country in the world.

3) China overall construction of a well-off society brings important opportunities for tourism development

In the period of The 11th Five Year Plan, along with the gradual advancement to a well-off society construction and continuous growth of national consumption level, Chinese citizens will shift their consumption manners from mainly in kind toward in both kind and services. Tourism will definitely benefit from this upgrading consumption.

4) The national strategy of stimulating domestic demand provides an sustainable impetus for tourism development

Hu Jintao, the secretary general of CCP, pointed out: "To stimulate domestic demand is the long-term strategy and basic foothold for national economic development, and it is also an indispensable condition for a stable and faster economic growth." Tourism possesses an unique advantage in enlargement of market demand, advancement of consumption power and level. It may play an active role in stimulating domestic demand and function as an important impetus in shifting the mode of economic growth. Meanwhile, the policy of domestic demand enlargement will help upgrade tourists' consumption level and consumption power, expand tourism market and therefore drive China tourism development in a continuous way.

5) Concerted support for the tourism industry creates a favourable environment

Since implementation of The 10th Five-Year Plan, governments at all levels has attached greater importance on the tourism development than ever before. There have been 25 provinces which list tourism as a pillar industry, leading industry or important industry. The awareness and potential of tourism development are greatly enhanced. A sound environment for tourism development is created.

6) Renaissance of Chinese culture promotes tourism development

Renaissance and rise of Chinese culture will boost up attractiveness and influence of