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北京旅游绿皮书

GREEN BOOK OF BEIJING'S TOURISM

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编著/北京旅游学会

ANNUAL REPORT ON BEIJING'S TOURISM
DEVELOPMENT (2018)



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摘 要

《北京旅游发展报告（2018）》是“北京旅游绿皮书”的第七本专题报告。全书由1篇主报告和20篇专题报告组成。主报告《迎接首都旅游发展新时代：构筑幸福产业与美好生活》既回顾了2017年北京旅游业的发展，亦正视旅游市场秩序、旅游资源开发等方面仍存在的问题，提出了2018年的工作方向，强调在供给侧结构性改革等方面着力，以构筑旅游幸福产业，满足人民美好生活需求。

基于北京“四个中心”定位，20篇专题报告分为首都旅游、文化旅游、国际旅游交往与服务、科技旅游四个篇章。

“首都旅游”包括五篇文章。《新时代下的旅游革命》是全篇统领性文章，提出新时代具有老龄化、大众化、大数据、高速交通、共享经济、新常态、后工业和中国崛起等八个特征，认为旅游业在消费、空间、治理结构和产业等方面正经历着革命性转型，提出北京新时代下的旅游发展转型思路；《首都旅游圈协同评价与战略研究》对首都旅游的协同性进行评价，认为2015年已进入基本成熟阶段，提出促进首都旅游圈高效协同发展的对策思路；《中国主场外交活动对首都旅游的影响研究》重点分析了近年来相关主场外交活动对于首都旅游发展在旅游形象推广、旅游竞争力提升、旅游市场拓展、会展旅游促进等方面的积极影响，同时提出了发挥主场外交活动效应、促进首都旅游发展的对策与建议；《首都政治中心旅游产品创新体系研究》对首都政治中心旅游发展形势进行研判，提出首都功能核心区的五种优势旅游资源以及旅游产品创新发展提升策略；《共享经济背景下北京传统旅行社经营模式创新研究》分析了北京传统旅行社经



营模式创新的制约因素，在充分认识机遇和挑战的基础上，提出共享经济背景下北京传统旅行社的创新经营模式。

围绕北京打造全国文化中心“一核一城三带两区”总体布局，“文化旅游”包括五篇文章。在文化城市建设方面，围绕北京城市总体规划，确定了北京文化旅游总格局、主轴线和重点片区，确定了旅游业发展的原则、方针和路径；从五个方面提出了北京中轴线历史遗产的旅游发展策略。在三个文化带保护建设方面，提出将北京段长城纳入长城国家公园，成立国家公园北京段长城管理委员会，建立与国家公园法规相融合的长城保护法律法规体系，划定长城沿线两侧各2公里保护带，进一步挖掘长城文化内涵，组建北京段长城旅游集团，实现“四权分离”的监督管理模式；在分析通州大运河文化旅游开发现状基础上，提出在城市副中心建设背景下通州运河文化旅游开发的总体思路 and 对策；在分析永定河大兴段文化旅游开发的重要意义的基礎上，以发展文化生态旅游为导向，提出关于永定河大兴段文化生态旅游发展的建议。

旅游业在促进国际政治合作、国际经济发展、国际文化融合、国际社会进步等方面发挥着重要作用，“国际旅游交往与服务篇”包括五篇文章。《国际组织对北京国际交往中心建设的促进作用》作为本篇的统领文章，明确提出北京在吸引国际组织入驻方面应将国际组织外交的策略提升至战略层面；《新时代北京入境旅游发展现状与对策研究》分析了北京入境旅游市场存在的问题，有针对性地提出了政策扶持精准化、聚焦近程客源市场、重视国际社交媒体营销等对策建议，旨在推动北京市入境旅游的健康发展；《2017年北京市出境旅游市场现状与政策建议》指出为更好地促进北京市出境旅游市场持续发展，涉旅企业可创新出境旅游产品，目的地旅游主管部门可提供有针对性的产品与服务，客源地旅游主管部门需继续加大出境旅游市场管理；《构建与首都城市战略定位相适应的首都会展业发展模式研

究》提出要高度关注首都会展业的发展模式和发展路径，不断提高服务“四个中心”建设，特别是国际交往中心建设的保障能力；《旅游目的地整合营销的传播力量——以洛杉矶为例》以洛杉矶旅游局为例，通过探析洛杉矶旅游局运营机制与营销模式，为其他旅游目的地的对外宣传提供借鉴。

科技改变生活，科技也在深刻地改变着旅游业。“科技旅游”篇中，篇首文章《北京旅游与科技旅游发展研究——基于“旅游+”视角》中指出，北京科技旅游资源富集但科技旅游并不发达，需要推动“文化+旅游+科技”融合发展；《科技发展前沿领域及其在北京旅游行业的应用》较为全面地梳理了与旅游业密切相关的科技发展前沿领域，以及在解决北京旅游行业发展痛点方面的情况；《人工智能助力北京旅游业蓬勃发展》建议政府应包容审慎监管，社会要共建开放共享价值生态；《基于淘宝数据的北京在线旅游商品研究》发现特产食品依旧是北京旅游商品经典，景区文创类产品潜力巨大；《区块链技术对北京旅游业发展影响研究》分析了区块链技术在增强北京旅游监管力度、智能合约方面的积极作用。

四个篇章紧密结合北京“四个中心”定位，对首都旅游、文化旅游、国际旅游交往与服务、科技旅游领域的热点问题进行了研究和探讨。每篇的篇首文章都具有统领性，其他入选文章在理论创新、实践指引等方面亦有可圈可点之处，对读者具有启示意义及参考价值。

Abstract

The Annual Report on Beijing's Tourism Development (2018) is the seventh book in the series Green Books of Beijing's Tourism. The book consists of one general report and 20 special reports. The general report, *Meeting the New Era of the Capital City's Tourism Development: Building a Happiness Industry and a Better Life*, not only reviews the development of Beijing's tourism industry in 2017, but also addresses issues regarding market order and tourism resource exploitation. It frames the goals of the 2018 tourism industry by focusing on supply-side structural reforms, building the happiness industry, and meeting the needs of people for a better life.

As Beijing is positioned as “four centers,” the 20 special reports are divided into four sections: *Tourism Development of the Capital City*, *Cultural Tourism*, *International Tourism Communications and Services*, and *Science and Technology in Tourism*.

The section *Tourism Development of the Capital City* consists of five articles. “The Tourism Revolution in the New Era” plays a leading role in this section. The article indicates that the new era is characterized by an aging population, massification, big data, high-speed transportation, a shared economy, the new normal, post-industry, and China's rise, while the tourism industry is undergoing revolutionary transformations in areas of consumption, space, governance structure, and the industry itself. Therefore, tourism development is in need of transformation for the new era. “Tourist Community of the Capital City: A Collaborative Evaluation and Strategic Research” evaluates the synergistic development of Beijing's

tourism, finds that tourist destinations have become mature since 2015, and recommends that an efficient and coordinated development of the capital city's tourist community Should be established in the future. "The Impact of China's Home Field Diplomatic Activities on the Capital City's Tourism" primarily analyzes the positive impacts of relevant home-based diplomatic activities on different aspects of Beijing's tourism industry in recent years, including destination image promotion, tourism competitiveness improvement, tourism market expansion, and exhibition tourism facilitation. The authors suggest that the benefits of home-based diplomatic activities should be yielded to promote the capital city's tourism development. "The Innovation System of Tourism Product of the Capital City as a Political Center" provides a critique of tourism development of the Beijing as a political center. The author finds that the core functional area of the capital city holds five types of advantageous tourism resources and provides strategies to promote the development and innovation of tourism products. "Business Model Innovation of Beijing's Traditional Travel Agencies in the Sharing Economy" analyzes constraints to business model innovation of Beijing's traditional travel agencies. Based on a comprehensive understanding of the opportunities and challenges, the authors propose innovative business models that can be used by Beijing's traditional travel agencies in the context of a shared economy.

In line with the overall plan of Beijing to build a national cultural center that contains "one core, one city, three belts, and two districts," the section *Culture Tourism* includes five articles. The leading article focuses on the topic of cultural city construction and emphasizes the master plan of Beijing city, suggesting that the development of Beijing's cultural tourism should be in accordance with "the general pattern, main axis and key areas" strategy of the master plan. It also defines the principles, guidelines, and paths of future tourism development. The second article proposes strategies for the development of historical heritage regarding Beijing's central axis from five aspects. As for the protection and construction of the



three cultural belts, the third article suggests that the Beijing section of the Great Wall should be integrated into the Great Wall National Park and recommends that an organization named Beijing Section Great Wall Management Committee of the National Park should be established. Further, regulations regarding Great Wall protection should be made and be consistent with those made for other national parks. Additionally, the 2-kilometer area along the two sides of the Great Wall should be delimited as protection belts, and the cultural connotation of the Great Wall needs to be further investigated. Finally, a Beijing Great Wall Tourism Group should be set up so that a reasonable “division of four powers” could be realized for the supervision and management of the Great Wall. The fourth article puts forward general ideas and countermeasures for Tongzhou Canal’s cultural tourism development against the background of the city’s sub-center, and the fifth article analyzes the importance of cultural tourism development of the Daxing section of Yongding River and provides suggestions for its development.

The tourism industry plays an important role in promoting international political cooperation, international economic development, international cultural integration, and international social progress. The section *International Tourism Communications and Services* consists of five articles. As the leading article in this section, “The Role of International Organizations in Promoting the Construction of Beijing as an International Exchange Center” clearly states that Beijing should upgrade its strategy of international organization diplomacy to a strategic level by attracting international organizations to move into the city. The article “Current Situation and Countermeasures of Beijing’s Inbound Tourism Development in the New Era” analyzes issues related to the inbound tourism market of Beijing and proposes countermeasures, including targeted policy support, highlighting the short-distance tourist market, and paying attention to international social media marketing to promote healthy development of Beijing’s inbound tourism. The article “Current Situation and

Countermeasures of Beijing's Outbound Tourism Market in 2017" states that travel-related enterprises need to focus on outbound product innovation, DMOs need to emphasize the provision of targeted products and services, and management organizations in the tourist-generating regions need to intensify the management of the outbound tourism market to increase promotion of the sustainable development of Beijing's outbound tourism market. "Construction of Developmental Models of the Capital City's Exhibition Industry in Line with the Strategic Positioning of the Capital City" suggests that close attention should be paid to the developmental models and paths of Beijing's exhibition industry, and that the supportive capacity regarding the four centers' construction, especially the construction of the communication center, should be continuously improved. "The Communication Force of a Tourism Destination's Integrated Marketing—The Case of Los Angeles" uses the Los Angeles Tourism Bureau as an example for exploring its operation mechanism and marketing model, which provide implications in terms of destination promotion.

Technology has changed our lives and has profoundly changed the tourism industry. In the section *Science and Technology in Tourism*, the first article "A Study on the Development of Beijing's Tourism and Technological Tourism Based on the Perspective of Tourism +" claims that Beijing has not achieved much progress in science tourism, although it holds rich sources of science and technology, so it is necessary to promote the integration of culture and tourism with science and technology. "Frontier Areas of Scientific and Technological Development and Their Application in Beijing's Tourism Industry" reviews the frontier areas of science and technology development closely related to tourism as well as how to solve the pain points during the process of Beijing's tourism development. "Artificial Intelligence Helps Beijing's Tourism Industry Flourish" suggests that the government should provide prudential supervision and that the society should establish an open and shared value



system. “A Study on Beijing Online Tourism Commodities Based on Taobao Data” identifies that specialty foods are still the classics of Beijing’s tourism commodities, implying great potential of cultural and creative products provided by tourist attractions. “Impact of Blockchain Technology on the Development of Beijing’s Tourism Industry” analyzes the positive role of blockchain technology in enhancing Beijing’s tourism market supervision and in contracting intelligent parties.

Closely concentrating on the positioning of Beijing’s four centers, the four sections discuss hot topics in the fields of tourism development of the capital city, cultural tourism, international tourism communications and services, and science and technology in tourism. The first article of each section has a leading role, while the others provide remarkable points in theoretical innovation and practical guidance, which have enlightenment and reference value for readers.

序 言

由北京旅游学会编著的年度连续出版物“北京旅游绿皮书”，自2012年迄今，已连续出版了七册。它是全国省级旅游部门的第一本旅游绿皮书，出版后得到了广泛的关注和好评，形成较强的社会影响力，为北京乃至全国的旅游发展提供了重要的理论与实践参考。

《北京旅游发展报告（2018）》继续由北京市旅游委委托北京旅游学会编辑出版，并仍沿袭其一贯的皮书风格和体例，由“主报告”和“专题报告”两大部分组成，组稿方式继续采用“总编纂+板块主编”模式。为深入贯彻习近平总书记考察北京时提出的“四个中心”建设要求，《北京旅游发展报告（2018）》结合北京市“四个中心”建设，分为“首都旅游”“文化旅游”“国际旅游交往与服务”“科技旅游”四个主题板块，深入研究北京市旅游业在新时期的功能及定位、发展情况和趋势，结合北京市工作重点，破解制约北京旅游业发展的问题和提出对策建议，为旅游业发展提供决策参考。

旅游业已成为北京建设“国际一流和谐宜居之都”的重要产业和京津冀协同发展的纽带产业。2018年是贯彻党的十九大精神的开局之年，是改革开放40周年，是实施“十三五”规划承上启下的关键一年。北京市旅游委全面深入学习贯彻党的十九大精神，以习近平新时代中国特色社会主义思想为指引，坚持新发展理念，牢牢把握首都城市战略定位，立足新时代、担当新使命，更好地满足人民群众日益增长的文化和旅游美好生活需要。比如，“首都旅游”篇认为，在我国建设中国特色社会主义新时代背景下，首都旅游发展既可以疏解北京非首都功能，还可以为国家“一带一路”倡议和解决不平衡不



充分的主要矛盾提供新的发展思路，从而实现首都生产空间集约高效、生活空间宜居适度、生态空间山清水秀，不断提升首都文化软实力和国际影响力。“国际旅游交往与服务”篇提出，在新时期、新趋势下，北京旅游在国际交往中发挥着不可替代的作用，北京“国际交往中心”的定位要求北京具有国际都市的魅力与形象，具有国际吸引力，具有较完善的社会基础设施建设及服务保障体系，保持生态环境、旅游环境良好。

《北京旅游发展报告（2018）》再次彰显了北京旅游学会作为北京旅游智力交流平台的积极作用。在此，我们对支持本书出版的作者、专家和编辑人员深表谢意！在北京旅游学会及专家学者的努力与辛勤工作下，《北京旅游发展报告（2017）》内容评价总分数达到91分，荣获全国第九届“优秀皮书奖”一等奖，对此，我们表示热烈祝贺。希望全国各地的广大旅游专家学者和业内人员一如既往地积极建言献策，为把北京建设成为国际一流的和谐宜居之都，为学界、业界全面了解和认识北京市旅游业发展情况，为各级领导决策参考做出贡献。

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