

# 中国文旅产业在城市更新与乡村振兴中的作用 The Role of China's Culture and Tourism Industry in the Urban Renewal and Rural Revitalisation Process

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中国文旅产业在需求拉动、  
企业参与和政策支持下蓬勃发展

**China's cultural and tourism industry is  
booming with strong demand, enterprise  
participation and policy support**

十几年前，加拿大世界文化项目工程主任D.保罗·谢弗，写有《文化引领未来》。发展文化产业和旅游业是世界性潮流，中国是这个潮流中的一部分。

**Over a decade ago, D. Paul Schaeffer, Founder and Director of the World Culture Project in Canada, published a book titled “Culture: Beacon of the Future”. Developing cultural and tourism industry is a worldwide trend, and China is part of the trend.**

中国发展的背景是老百姓的温饱问题得到解决，文化和旅游逐步成为消费选项。

The background of China's development is that, as people's livelihood improves, there is a growing demand for culture and tourism.

在中国每个节假日特别是黄金周，许多城市旅游业火爆，景区人气很旺，旅游过去是小众消费，现在大众旅游已成为突出趋势

Public holidays in China, especially the Golden Week, see a huge number of tourists visit popular cities & scenic spots. Tourism is no longer a niche market, but a prominent general trend.

在城市居民之后，农民也参与到旅游大军之中，特别是在我国经济发展比较好的东部地区的农民开始走出家门，其他地区有越来越多的农民也动了起来。城乡居民文化和旅游消费热情，成为产业发展的强劲动力。

Not only urban residents but also rural residents are beginning to make holiday trips, especially those from economically strong eastern regions in China. An increasing number of farmers in other regions is also joining the trend. Their enthusiasm for culture and tourism consumption is a strong driving force for development.



文化和旅游业是一个时期以来，中国企业数量增长最大、创新创业表现最活跃的领域之一

Cultural and tourism industry has been one of the areas with the largest growth in the number of Chinese companies and the most active performance of innovation and entrepreneurship.

有的企业迅速成长为头部企业和上市公司，而大量的中小微企业，则是这个行业的主体。它们在适应市场变化和就业创新上具有很强的适应性及灵活性，特别适合今天中国文化产业和旅游的行业发展需要，也保持了行业的持续活力。

Some companies are rapidly growing into leading players and public companies, while a large number of small, medium and micro enterprises are the main body of this industry. They are highly adaptable to market changes and flexible in employment and innovation, which are particularly suited to the needs of China's cultural and tourism industry, maintaining vitality in the sector.

还有一个重要趋势，由于文化产业和旅游业普遍为社会看好，**大量其他行业的企业跨界进入**，比如建筑、信息、农林、水利、能源等等，明显壮大了文旅产业的实力。

There is another important trend. Given the popularity of the cultural and tourism industry, a large number of enterprises from other sectors such as construction, information, agriculture, forestry, water conservancy and energy also join the development, which further strengthens the cultural and tourism industry.



## 政策的支持在中国文旅产业发展中发挥了重要的推手作用

### Policy support plays an important role in the development of China's cultural and tourism industry

文化产业和旅游业都是朝阳产业，具有污染小、耗能小、就业创业门槛低、产业链长等优势，而且都是典型的富民产业。因此，中国政府连续发布相关规划，对行业发展起到了风向标。

**Cultural industry and tourism industry are both sunrise industries** with low pollution, low energy use, low threshold for employment and entrepreneurship, and extensive industry chain, which benefit the people. The Chinese government has released several plans to guide the development.

具有里程碑意义的是2009年在应对金融危机中，国务院出台《文化产业振兴规划》，引发了社会对文化产业的高度关注，调动了企业进入文化产业的积极性，由此成为中国文化产业发展的新起点。

The State Council issued the **Culture Industry Revitalization Plan** in 2009, a milestone document in response to the financial crisis. It drew much attention to the cultural industry, mobilized the enterprises and became a new starting point for the development of China's cultural industry.

近年来，在**全球性的数字经济**发展的同时，中国政府也出台政策，在导向上支持数字文化产业和智慧旅游。这次新冠疫情期间，文化和旅游部及相关部门又发布一系列政策，为企业解危纾困。

As the **global digital economy** develops over recent years, the Chinese government has also introduced policies to guide and support the digital cultural industry and smart tourism. During the COVID-19 pandemic, the Ministry of Culture and Tourism and related departments issued several aid policies to affected businesses.





文旅产业是城市更新与乡村振兴  
热点领域

**Cultural and tourism industry is key to urban  
renewal and rural revitalization**

世界很多国家经历过乡村复兴与城市更新，只是叫法不一样

Many countries have experienced rural revitalization and urban renewal. They might just call it differently.

当今中国的乡村振兴与城市更新，有各自的综合性任务，包括经济发展、居民生活条件的改善。而文化和旅游在乡村振兴与城市更新中都有重要的份量。

Currently, China faces various tasks in revitalizing its rural areas and renewing urban regions, including economic development and improving people' living conditions. Culture and tourism have an important part to play in the process.

在《中华人民共和国乡村振兴促进法》中，文化振兴位列五大振兴的第三位，而且，它能够全面赋能于产业振兴、人才振兴、生态振兴和组织振兴。这个法律还对乡村旅游提出了发展要求。

In the Law of the People's Republic of China on the Promotion of Rural Revitalization, culture revitalization is ranked the third, and it can empower the other four areas of industry, talent, ecology and governance. This law also sets out development requirements for rural tourism.

与此同时，国家在“十四五”期间实施的城市更新行动，也受到各方面的高度关注。这两件涉及中国城乡的大事，都贯穿着文化的旋律，尤其是在保护城乡文化，维护城乡肌理方面异曲同工。

The nationwide urban renewal initiative during the 14th Five-Year Plan period has received much attention from various stakeholders. Both strive to preserve the unique culture and fabric of urban and rural areas.



各地的城市更新与乡村振兴，情况千差万别，所要依托和发展产业以及环境也大不相同，文化和旅游进入的方式、占有的份量，也不尽相同。

**The situation of urban renewal and rural revitalization varies greatly from place to place, so are the industries and conditions for development. The culture and tourism industry may take different forms and weight in local development.**

各地或以其他产业为主业，融入文化元素；或以文化产业为主，融入其他行业，在融合中与其他行业相互赋能、相互添彩，共同支撑起老城区和乡村的产业，让这些地方富起来、美起来。因此，在旧城改造和乡村发展中发展文旅产业已经成为重要选项。

Each region either takes other industries as the main focus and integrates cultural elements, or takes the culture industry as the main focus and integrates other industries. In the process, they empower each other, and jointly develop old neighborhoods and villages. Therefore, culture and tourism industry has become an important option in urban renewal and rural development.

中国各地正在把城市和乡村都建设成为美丽城市、美丽乡村，建设成为宜居、宜业、宜游的地方。在城市更新与乡村振兴的文化保护和利用中，将旅游产业植入进去，使“旧城游”与“乡村游”相互呼应，成为“周边游”、“身边游”的主打项目。

All over China, cities and villages are striving to become a beautiful place to live and work. In the process, cultural preservation and utilization efforts incorporate the tourism industry to create "old town tours" and "rural trips" as part of "neighborhood tours".



在城市更新与乡村振兴中发展文旅产业要善用“三针”：插针、扎针、绣针

## The development of culture and tourism industry in urban renewal and rural revitalization process should follow three key strategies

**插针**，即所谓见缝插针。文旅产业固然需要大的空间施展身手，大手笔，大制作，但更多是利用城乡空余空间做项目

**The first is to “stick in a pin wherever there's room”.** Culture and tourism industry certainly needs much space and resource to grow and thrive, but it is also important to make use of available space for projects.

**扎针**，即中国的针灸之术，要找准位置，拿捏方法，激活文化资源。

**The second is “acupuncture”** precision in implementation. Find the right place, take the appropriate method, and activate cultural resources.

**绣针**，即绣花功夫。在对乡村以及旧厂区、旧商业区、旧居住区等进行修补、织补式更新中，一是针要细，有耐心和定力，小心翼翼地呵护这里的文化资源；二是针要巧，遵循文旅规律和方法，调动各种手段，包括科技、金融等手段，还要增强适应市场的能力。三是针要活，有好的创意和表现手法，精思巧构，画龙点睛，精准把握文旅消费特征和趋势，特别是把握当地文旅市场的需求，实现特色文化资源与现代文化、时尚文化、流行文化的有效对接。

**The third is “embroidery work”.** When renewing old factories, commercial areas, residential areas and villages, it is important to have patience and determination, take care of cultural resources, mobilize technology, finance and other means, and adapt to the market. It is also necessary to be creative and expressive, to accurately grasp the characteristics, trends and needs of local culture and tourism consumption, and to effectively integrate unique cultural resources with modern, fashionable and popular culture.



案例城市在城市更新、乡村振兴  
文旅产业合作实践与建议

**Case studies of cities that integrate culture and  
tourism in the urban renewal and rural  
revitalisation process and suggestions**

# 1. 源源 Background

对外交流开启了早期的中国文化产业和旅游业，在案例城市有突出表现。

**Foreign exchanges give rise to China's culture and tourism industry, which shows clearly in the case cities.**

**烟台**苹果新品种的种植，葡萄酒生产、葡萄种植都与对外交流有关，现在仍然是中国的名优产品，也带动了乡村发展。

**Yantai's** new apple varieties, wine production and grape growing are the result of foreign exchanges. The products remain popular in China and have helped develop the countryside.

草编历史悠久，近代史上，德国商人来这里招募手艺人到德国传授技艺，带动了胶东半岛港口出口贸易额，被称为中国“近代实业之光”。

Straw weaving has a long history. In modern history, German merchants came here to recruit craftsmen to teach their skills in Germany, which drove the export volume of Jiaodong Peninsula. It was called the "pride of modern industry" in China.

烟台一带几乎所有妇女都会的“棒槌花边”，原是欧洲传统的手工艺，在二十世纪走向衰落，现已无人传承。而山东自古以来是刺绣之乡，遇到棒槌花边这项技艺，就有了相见恨晚的感觉，到了上世纪八、九十年代，进入鼎盛时期。但此后又急剧萎缩，现在作为中国的国家级非遗项目得到政府扶持，并且被开发为特色文化产业。

Almost all women in the Yantai area know 'mallet lace', a traditional European craft that went into decline in the twentieth century and is no longer carried on. Shandong Province has been the home of embroidery since ancient times, and the craft reached its peak in the 1980s and 1990s. But since then it has declined dramatically. Now, as a national intangible cultural heritage in China, it is being supported by the government and developed into a special culture industry.



备注：图片来自网络 Note: Internet Images

**杭州附近的莫干山**，风景悠美，包括宋代著名文人苏轼都在这里留下了诗篇。1891年，美国传教士佛利甲到过这里，发现山水之美，并写信传扬出去。随之而来的一位外国教士和两位博士决定留下，后来越来越多的外国人在这里休假、建房子。

**Moganshan near Hangzhou** is a beautiful scenery area. SU Shi, a famous poet of the Song Dynasty, wrote poems about it. In 1891, Fletcher, an American missionary, visited the area and was deeply impressed by the beauty of the landscape. He wrote letters to spread the word. A foreign missionary and two doctors decided to stay, and more foreigners later also came and built houses here.

在中断几十年之后，这里发展成著名民宿集群。南非年轻人高天成租下了几幢农民闲置的泥坯房，在不改变原有房屋结构、不破坏整体风格的基础上融入低碳、环保理念进行了装修，成立了裸心乡。后又发展成裸心谷、裸心堡，成为中国旅游著名打卡地。带动了这一带乡村民宿的迅猛发展。高天成还组建了旅游集团。2012年他获得“2012浙江年度旅游人物”的殊荣。

After a decades-long hiatus, the area has developed into a cluster of famous homestays. Grant Horsfield, a South African businessman rented several mud houses from farmers and renovated them under low-carbon and environmental concepts without changing the original house structure or destroying the style. He established the Naked Stables, which was followed by the Naked Valley and Naked Castle, all of which became famous tourist hits in China. This has led to the rapid development of rural homestays in the area. In 2012, he received the 2012 Zhejiang Tourism Personality of the Year award.



## 2. 现状 Current situation

在今天的城市更新和乡村振兴中，外国企业和创客找到了施展身手的天地。

In today's urban renewal and rural revitalisation process, foreign companies & makers have found a place to play their part.

城市更新方面，北京798文化产业园区可称为范例。

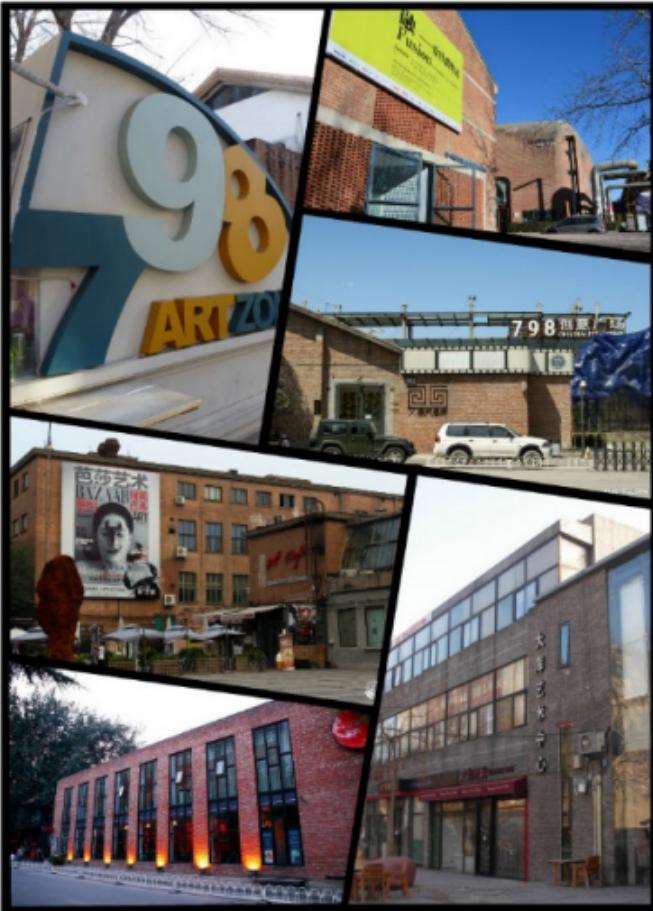
For urban renewal, the Beijing 798 Art Zone stands out as a good example.

这里曾经是一家无线电器材厂的搬离后留下的老旧厂房，由于部分厂房属于典型的现代主义包豪斯风格，整个厂区规划有序，建筑风格独特，吸引了更多艺术家前来，包括外国艺术家、设计师和企业、机构，慢慢形成了今天的艺术园区。一些年来，多个国家的首脑和欧盟主席（巴罗佐）先后参观访问过798艺术区。

This was once the old factory building of a radio equipment factory. Parts of the factory were built in the typical modernist Bauhaus style, well planned and architecturally unique, and attracted foreign artists, designers, companies and institutions to the area, slowly forming the art zone that it is today. Several heads of state and the President of the European Union (Jose Manuel Barroso) have visited the 798 Art Zone.

施罗德感叹：“几十年前的包豪斯建筑在德国都很少发现了，今天居然在798存在，真是太难得了。”利用成片的老厂房建设文化产业园区，是中国城市更新的手段之一，798成功地开创了先例。

Gerhard Schröder exclaimed: "Bauhaus buildings from decades ago are rarely found in Germany, but today they actually exist in 798, which is so special." The use of old factory buildings as culture parks is one of the means of urban renewal in China, and the 798 Art Zone has successfully set a precedent.



备注：图片来自网络 Note: Internet images



**成都“东郊记忆”**——国际时尚产业园区，是在一个电子管厂旧址上改建而成的，这个园区围绕时尚和艺术聚集了文化创意、时尚设计、新品发布、艺术展演、数字音乐等多元业态，已成为国内独具特色的代表性文创产业园区。

**Chengdu "Dongjiao Memory"** - International Fashion Industrial Park was converted from the site of a former electronic tube factory. It has become a unique cultural and creative industrial park in China, gathering cultural creativity, fashion design, new product release, art exhibition, digital music and other diversified business forms around fashion and art.

通过举办国际性艺术展会、时尚发布、高峰论坛、音乐节会、顶级赛事等活动，大力提升园区的国际知名度与显示度，为建设国际化园区奠定了坚实基础，已连续数年成功举办“成都国际友城青年音乐周”“米兰时尚周中国行”“国际时尚品牌新品发布会”，以及多项体育赛事和艺术展演展示活动，成为**成都艺术和旅游的新地标**。

By organizing international art exhibitions, fashion launches, summits, music festivals and competition events, the park has greatly enhanced its international visibility and competence. For several years, the park has successfully hosted the Chengdu International Sister Cities Youth Music Week, Milan Fashion Week China Tour, New International Fashion Brand Launch, as well as several sporting events and art exhibitions, making it a new landmark for art and tourism in Chengdu.

我国农家乐发源地有多个说法，其中得到原国家旅游局命名为“中国农家乐旅游发源地”称号的是成都郫都区农科所的农家乐。

There are several claims about the birthplace of Nongjiale (agritainment) in China, among which the **Nongjiale in Pidu District of Chengdu** was recognised by the former National Tourism Commission as "the birthplace of Nongjiale tourism in China".

最出名的是成都锦江区的三圣乡，这里四季花开不断、蝶舞蜂飞。最早是很多本土艺术家聚居在此，然后，来自德国、日本、新加坡、瑞士、澳大利亚、南非、比利时、墨西哥等众多国家的近百位艺术家长期驻留这里，融入成都生活和乡村风光，把这里看作是艺术的福地，是国际化程度很高的艺术村落。

The most famous is **Sansheng Township in Chengdu's Jinjiang District**, where flowers bloom and butterflies fly throughout the seasons. Here many local artists gathered, and were joined by about 100 resident artists from Germany, Japan, Singapore, Switzerland, Australia, South Africa, Belgium and Mexico later. It is regarded as a blessed place for art and a highly international art village.

如今，这里已是一个集商务、休闲度假、文化创意、乡村旅游为一体的旅游休闲胜地，先后被国家旅游局、建设部、文化部等部门授予“国家AAAA级旅游景区”、“首批全国农业旅游示范点”、“中国人居环境范例奖”“国家文化产业示范基地”、“市级森林公园”等称号。如今，这里的一些民宿已变为“洋家乐”。

Today, it is a destination for business, leisure, vacation, cultural creativity and rural tourism, and has been awarded the titles of "National AAAA Grade Tourist Attraction", "First National Agricultural Tourism Demonstration Site", "China Habitat Model Award", "National Culture Industry Demonstration Base" and "Municipal Forest Park" by the National Tourism Commission, the Ministry of Construction and the Ministry of Culture. Nowadays, some of the homestays have become rather international.



成都郫都区农科所的农家乐 Nongjiale, Agricultural Sciences Institute, Chengdu Pidu District



## 北京慕田峪长城脚下的国际网红村：北沟村

### A global village at the foot of the Mutianyu Great Wall, Beijing: Beigou Village

北沟村曾经是一个经济落后的小山村，但风景十分优美。多年前，中国人唐亮和她的美国丈夫萨洋在这里把污染严重的瓦厂买下后停止生成琉璃瓦，把它改建成精品民宿，吸引了众多游客。

Beigou Village was once a small, economically backward but beautiful mountain village. Years ago, Chinese Tang Liang and her American husband Jim Spear bought a heavily polluted tile factory here and turned it into a boutique homestay that has attracted many tourists.

随后又有来自美国、法国、荷兰、加拿大、德国、丹麦等多国友人纷纷来到北沟村，租下当地村民闲置的房子，将之作为北京之外的第二住所。

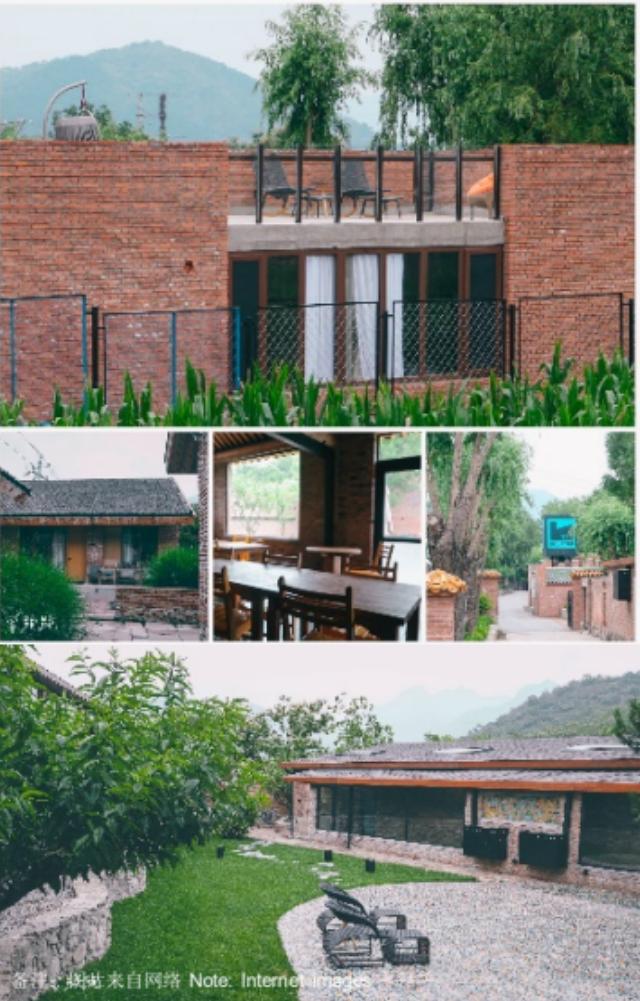
Later, many people from the United States, France, the Netherlands, Canada, Germany, Denmark and other countries came to Beigou Village and rented the unused houses of local villagers as their second residence outside of Beijing.

北沟村现已成为京郊远近闻名的国际文化村。

Beigou Village has become an international cultural village known far and wide in the suburbs of Beijing.

案例城市在中国城市更新与乡村振兴中参与文化和旅游产业，这样的例子还有很多。

There are many other cities involved in developing the culture and tourism industry in China's urban renewal and rural revitalisation process.



备注：资料来自网络 Note: Internet images

### 3. 建议 Suggestions

我想用八十多年前一位英国年轻人的建议作为对未来愿意到中国城市、乡村发展文旅产业的企业家、艺术家、设计师和创客的建议。

I would like to share the advice of a young British man over eighty years ago with future entrepreneurs, artists, designers and creators who are willing to join the culture and tourism development in China's cities and villages.

不久前我到烟台参加山东省旅游发展大会，在宾馆房间的桌上看到《图说烟台（1935-1936）》，是位名为阿美德的英国人写的，生平不可考，是一本再版书，最早出版何处也不知道，但翻看一下却像遇上了知音。对烟台有特别美好的回忆，写这本书是为了记录这些回忆，并向世界介绍烟台。

Not long ago I went to Yantai to attend the Shandong Tourism Development Conference. In my hotel room I came across a book called Yantai in Pictures (1935-1936), by an Englishman called A. G. Ahmed, whose life is unknown. It is a reprint. I don't know where it was first published, but when I look through it, I feel like I've met an intimate friend. He mentioned that he had particularly fond memories of Yantai and wrote this book to record them and to introduce Yantai to the world.



# 我从他这本书里提到的启发是 **Inspirations I got from his book:**

**第一，关注中国的变化。**阿美德在序中说，中国不受世界关注的时代已经成为过去，把整个中国笼统地看作完全一致和一成不变认识的时代，已经成为过去

**First, focus on the changes in China.** In his preface, Ahmed wrote that the time when China was not on the world's radar is a thing of the past, and the time when the whole of China was seen in general terms as completely consistent and unchanging in its understanding is also a thing of the past.

**第二，融入中国城市和乡村，把握各地特色。**阿美德提出，理解这个国家的最好办法，是分别研究某个省或某个城市的细节。据他自述，父亲在上海定居六十年，作者本人对中国曾进行过广泛游历，对中国语言、民俗以及民族特点有广泛了解。

**Second, immerse oneself in the cities and villages of China and understand the characteristics of each place.** Ahmed suggests that the best way to understand the country is to study the details of a province or a city. According to his own account, his father settled in Shanghai for sixty years, and the author himself has traveled extensively in China with an extensive knowledge of the Chinese language, folklore, and ethnic characteristics.

**第三，有创意。**他跑遍烟台访了不少人，而且这本书图文并茂。另外，当地有关部门找出这本书正式再版，又是一个很好创意。这是向这位为烟台旅游做出过贡献的人士致敬，也为读者提供了一个外国人观察烟台城市、乡村的视角。今天我们也向他致敬，向所有已经或将要参与中国文旅产业的外国企业和友人致敬。

**Third, be creative.** He travelled all over Yantai interviewing many people and the book is well illustrated. In addition, it can be a good idea for the local authority to reprint this book as a tribute to a man who has contributed to tourism in Yantai. The book can also provide readers with a foreigner's perspective on the city and countryside of Yantai. Today we would like to pay tribute to him and to all foreign companies and friends who have or will take part in China's culture and tourism industry.

谢谢大家  
Thank you!



中國人民大學  
RENMIN UNIVERSITY OF CHINA  
文化产业研究院

# 2021年中国文化产业“十二大”热 点现象盘点

## Top 12 Phenomena in China's Culture Industry 2021

主讲人：周意  
Zoey ZHOU

中国人民大学文化产业研究院

Institute of Culture Industry, Renmin University of China



• 中国人民大学开展文化产业主题研究的专属机构。

- An institute dedicated to researches on cultural industry
- 以中国人民大学文化科技园为依托，整合来自中国人民大学、相关科研院所及产业链的优质资源，开展**国家文化产业政策咨询、区域文化产业战略顾问、文化产业园区运营管理、文化产业人才培养、文化旅游融合、文化科技融合、文化振兴乡村等业务**。
- Based in the Culture and Technology Park of Renmin University of China, the Institute consolidates quality resources from the University, research institutes and industry chain to support **national cultural industry policy development, regional cultural industry strategy formulation, cultural industry park operation & management, cultural industry talent training, culture and tourism integration, cultural and technology integration, as well as cultural revitalization of rural communities**.
- 自2009年成立以来，研究院已承担国家各部委、省市、区县等各级各类文化产业课题120余项，为全国57个地区编制了文化产业发展规划。
- Since its establishment in 2009, the Institute has undertaken over 120 cultural industry research subjects at ministerial, provincial, municipal, district and county levels, and made development plans for 57 regions.
- 2021年8月，研究院入选文化和旅游部**首批文旅行业智库建设试点单位**。
- In August 2021, the Institute was chosen by the Ministry of Culture and Tourism to be among the **first batch of pilot think tanks for culture and tourism research**.



# 《2021年中国文化产业发展回望及对策建议研究报告》 Research Report on the Development of Culture Industry in China and Countermeasures 2021

为梳理2021年中国文化产业热点，把脉国家文化产业发展走向，总结行业存在的问题并提出对策建议，助力中国文化产业高质量发展，中国人民大学文化产业研究院联合中国民营文化产业商会、腾讯文旅产业研究院，共同发布《2021年中国文化产业发展回望及对策建议研究报告》。

The Institute joins hands with the China Cultural Chamber of Commerce for the Private Sector and the Tencent Culture and Tourism Industry Research Institute in releasing the Research Report on the Development of Culture Industry in China and Countermeasures 2021, which aims to review the hotspot topics of China's culture industry in 2021, follow the industry development trends, review issues and countermeasures, and promote quality development of the culture industry in China.



# 2021年中国文化产业发展的主要影响因素及发展特征

## Key Influencing Factors and Features of China's Culture Industry in 2021

疫情防控常态化

Normalised pandemic  
prevention and control



文化产业数字化 深化“上云用数赋智”  
Digitization of the culture industry  
More “cloud-based big data  
and AI initiatives”



国家乡村振兴战略

National rural  
revitalisation strategy



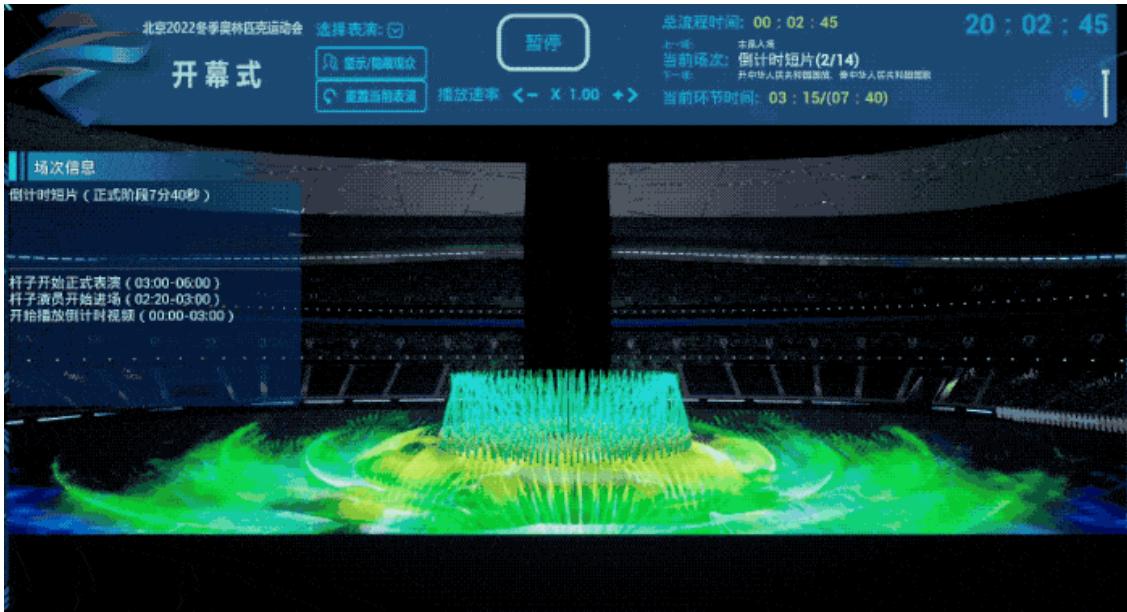
- 线下发展受挫，“云经济”快速增长  
Physical businesses hard-hit  
but a booming "cloud economy"

- Z世代成为新业态的消费主力军  
Gen-Z makes  
the leading consumers of  
new business formats

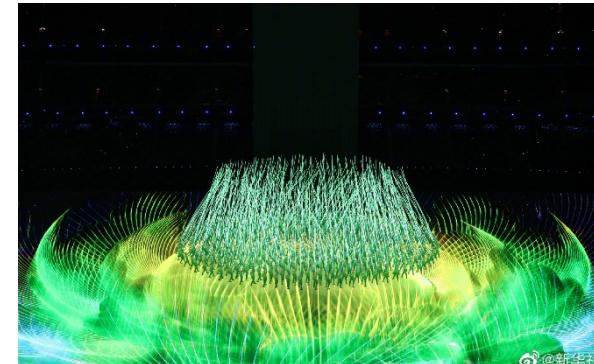
- 积极助力国家战略落地  
Actively implementing  
national strategies

# 2021年中国文化产业“十二大”热点现象 Top 12 Phenomena in China's Culture Industry in 2021

## 1. 元宇宙：互联网及文化产业的下一个成长空间 Metaverse: the next point of growth in the Internet space and culture industry



冬奥会“虚拟开幕式”及现场图片  
Winter Olympic Games "Virtual Opening Ceremony" and live pictures



## 2. NFT · 文化产业发展新模式 NFT, a new model for culture industry development



冰墩墩NFT数字盲盒、冬奥雪花  
NFT Bing Dwen Dwen NFT digital mystery toy box  
Winter Olympic snowflake NFTs



恭喜你得到了属于  
你的冬奥雪花  
CONGRATS! YOU HAVE CREATED  
YOUR VERY OWN BEIJING 2022  
WINTER OLYMPICS SNOWFLAKE.

### 3. 虚拟数字人，创造偶像文化新经济 Virtual humans create a new idol economy

部分虚拟偶像形象 Selected virtual idols



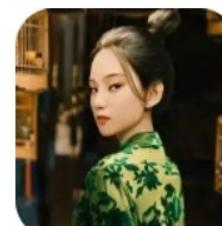
初音未来  
所属企业：Crypton Future Media



洛天依  
所属企业：上海禾念



一禅小和尚  
所属企业：大禹网络



翎Ling  
所属企业：魔法科技与次世文化

Hatsune Miku

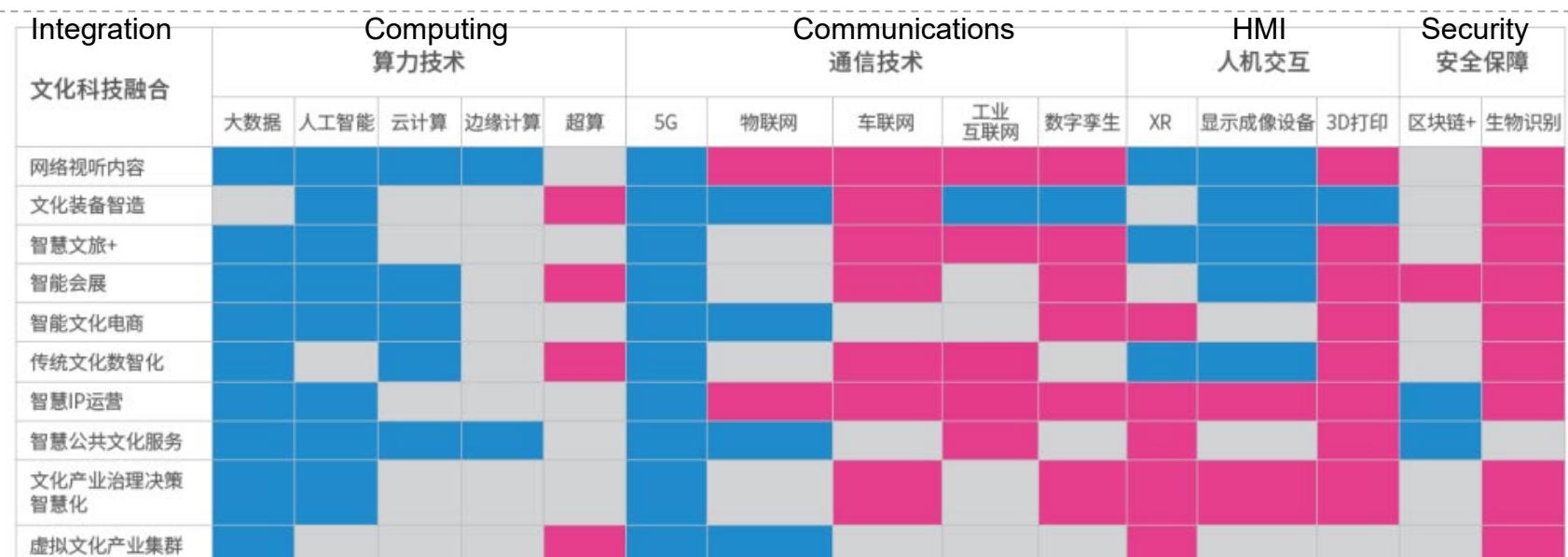
### 4. 数字文化，构建文化产业新生态 Digital culture builds a new ecosystem for the cultural industry

文化科技融合的代表性场景和相关技术融合水平分析  
Analysis of the level of integration of culture and tech and some typical scenarios

洛天依献唱  
北京冬奥会文化节开幕式  
Luo Tianyi performing at the Beijing Winter Olympics Cultural Festival Opening Ceremony



万科总部优秀新人奖获得者  
“虚拟人”崔筱盼  
“Digital employee” CUI Xiaopan won the Vanke Headquarters Outstanding Newcomer Award



深度融合  
Integration level: high

中度融合  
Integration level: medium

轻度融合  
Integration level: low

资料来源：《2021文化科技融合报告》—腾讯研究院·清华大学文化创意发展研究院  
Source: Culture and Technology Integration Report 2021 by Tencent Research Institute and Institute for Culture Creativity of Tsinghua University

## 5. 文化振兴乡村 · 焕发乡村文旅新活力

### Cultural revitalization of rural communities, injecting new momentum into rural cultural and tourism development

蜀南竹海乡村图书馆 Shunan Bamboo Sea Rural Library



表：2021年上半年抖音“乡村”内容数据

Table: Douyin “countryside” videos and figures in H1 2021

关键词	播放量	点赞量	评论量	分享量
美丽乡村	46.2亿	1.32亿	2050万	490万
城市融合发展	1200万	10.7万	1.2万	1.7万
乡村非遗	115万	1.7万	0.3万	0.3万

数据来源：中国旅游研究院&巨量引擎城市研究院  
《文化赋能旅游·旅游振兴乡村》

Source: Culture Empowers Tourism and Tourism Revitalizes the Countryside, China Tourism Academy & Ocean Engine Urban Research Institute

## 6. 传统文化“活化”，彰显文化自信魅力 “Reviving” traditional culture and showing cultural confidence



传统文化视频评论热词

Comment buzzwords for traditional culture videos



四川三星堆“川蜀小堆”盲盒  
Sanxingdui mystery boxes, Sichuan



河南唐宫夜宴综艺  
The Banquet show in Palace of Tang Dynasty, Henan

## 7. 沉浸式娱乐·文化场景的创新热点 Immersive entertainment, new spots of innovation for cultural industry

《明星大侦探》综艺 Who's the Murderer - Variety Show



2021年中国剧本杀综艺节目一览  
Chinese Murder Mystery Entertainment Shows in 2021

播放平台	综艺名称	播放时间
芒果TV	《明星大侦探》6	2021.1-2021.3
爱奇艺	《萌探探探案》	2021.5-2021.8
爱奇艺	《奇异剧本鲨》	2021.7-现在
优酷	《闪耀的侦探家》	即将上映
爱奇艺	《最后的赢家》	即将上映
优酷	《玩票大的》	即将上映
爱奇艺	《最后的赢家》	即将上映
央视网	《风云剧会》	即将上映
百视TV	《X扇门卷宗》	即将上映

数据来源：艾媒咨询《2021年中国剧本杀行业用户研究及标杆企业案例分析报告》  
Source: China Murder Mystery Entertainment Industry User Research and Leading Enterprise Case Study Report, iiMedia Research

## 8. 游戏电竞·助力游戏产业高速发展 Gaming and e-sports develop rapidly

China's esports user 2006-2020 (100 mio)



数据来源：《银河证券  
：电竞行业深度报告—  
—产业发展正当时·电  
竞夺冠承势起》

Source: Galaxy Securities: In-depth Report on the e-sports Industry - Booming Development and Rising e-sports



EDG夺得2021年《英雄联盟》全球总决赛冠军  
Edward Gaming (EDG) wins the League of Legends World Championship 2021

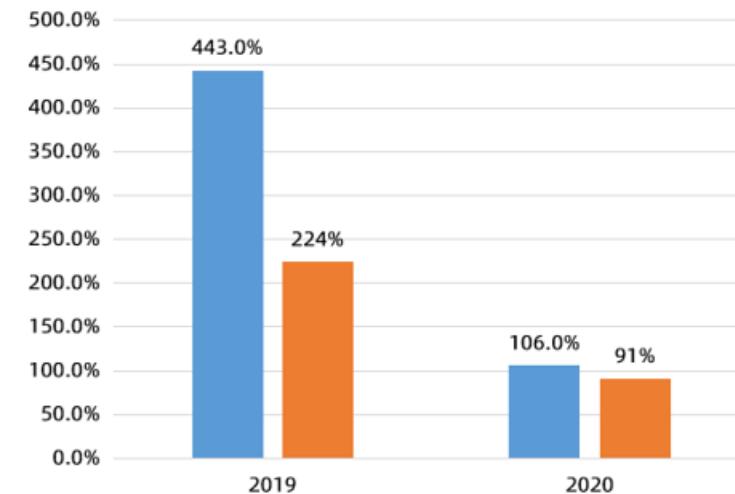
## 9. 亚文化“破圈” Z世代引领新消费浪潮

**Subculture exceeds its own sphere of influence and gains popularity in a wider range, Gen-Z leads the new wave of consumption**

|二次元 ACGN|国风国潮 China-Chic|游戏电竞 Gaming & e-sports|  
 潮玩酷物 Cool Stuff|硬核科技 Hardcore Tech|御宅组 Otaku|偶像  
 圈 Fan Club|快文娱 Fast Entertainment |COS|宠物 Pets|新舞音乐  
 New Dance Music|新健康 New Health|新艺术 New Art|新教育  
 New Education|新竞技 New Athletics|街头野外 Outdoors|

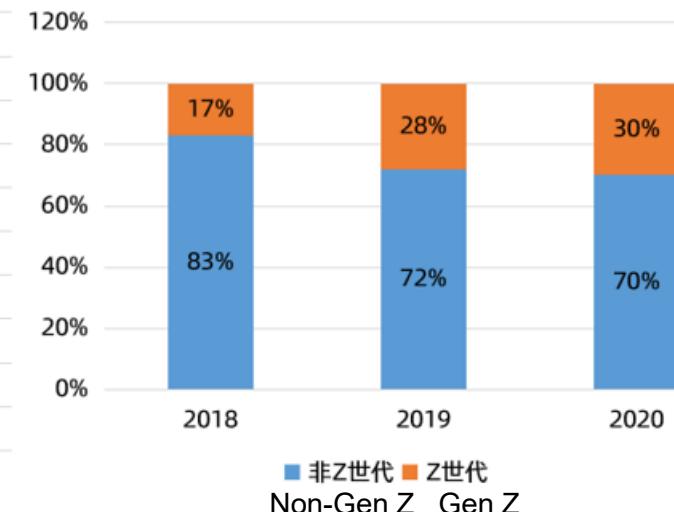
Gen Z consumption GMV growth faster than overall market

Z世代潮流消费GMV增速高于市场整体



Gen Z consumption GMV trends

Z世代在潮流消费市场中的GMV占比演变趋势

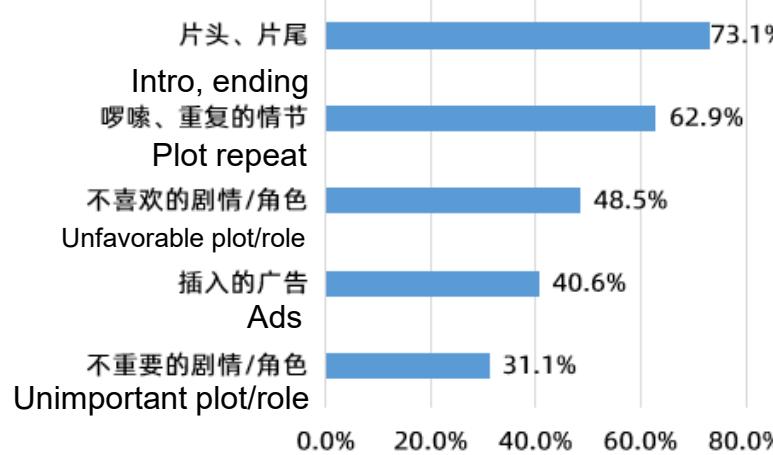


数据来源：IP蛋炒饭公众号、中信证券《基于B站热度的Z世代消费指数构建》

Source: Construction of Generation Z Consumption Index Based on bilibili Popularity, IPCOOK and CITIC Securities

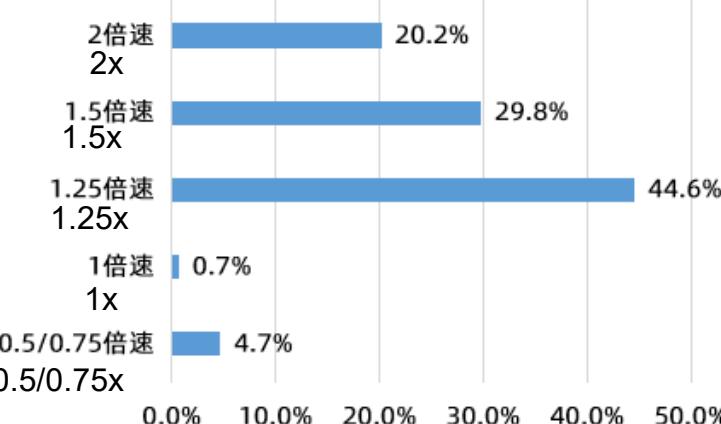
### Gen Z Content Skip

Z世代用户拖拽进度条的内容



### Gen Z video playback speeds

Z世代习惯的视频播放速度



数据来源：芒果TV《95后&00后视频用户行为研究》 Source: Post-95s & Post-00s Video User Behavior Study, Mango TV

## 10. 快文娱当道 年轻一代的文化消费新主流

**Fast entertainment is the way to go: the new mainstream of cultural consumption among the younger generation**

## 11. 直播电商 · 后疫情时代的常态消费模式

Livestream e-commerce becomes a common consumption model in the post-pandemic era

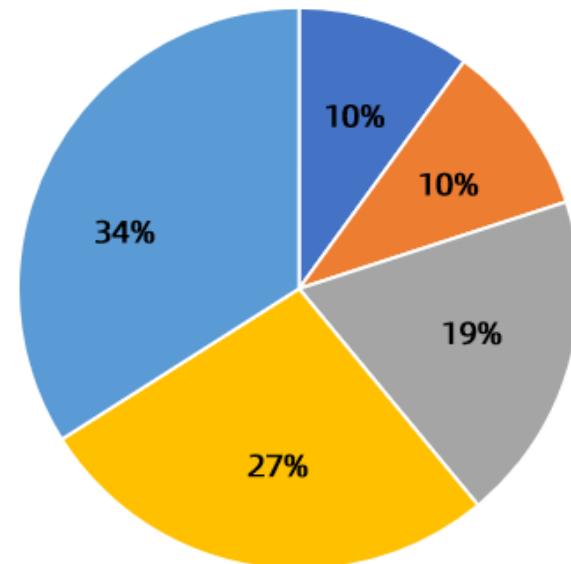
主要直播带货平台月活用户规模 (万)  
Number of monthly active users on major live-streaming platforms (10,000)



2021双十一预售首日累计直播交易额  
Sales of a livestreamer on the first pre-sale day of the Double 11 Shopping Festival  
2021

私域流量		
Private Domain Traffic		
公域平台	私域平台	裂变增量
Public Domain Platform	Private Domain Platform	Exponential growth

2021年品牌私域营销布局情况 Brand private domain marketing, 2021



■ 未部署, 短期内不考虑部署  
No plan

■ 目前未部署, 未来预计部署  
Not yet but has plans

■ 仅依靠人工, 通过社群运营等方式实现私域营销  
Social media marketing

■ 人工营销+私域技术服务商营销模式  
Social media marketing + operator

■ 通过技术服务商布局品牌私域  
Technical service provider

12. 私域流量  
品牌营销新阵地  
Private domain traffic, a new battlefield for brand marketing

中国文化产业未来合作发展建议

Suggestions for future cooperation with China's cultural industry

产业集聚+文化科技 国际国内+线上线下 城市更新+乡村振兴

Industry cluster + cultural technology, International and  
domestic + online and offline, Urban renewal + rural  
revitalisation

新模式 新业态 新场景

New model, new format, and new scenario



谢谢大家  
**Thank you!**

Zoey Zhou

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# China - Tourism Trends, Prospects, Challenges and Opportunities

IURC China Online Training Series - Understanding Tourism and Culture Industry in  
China

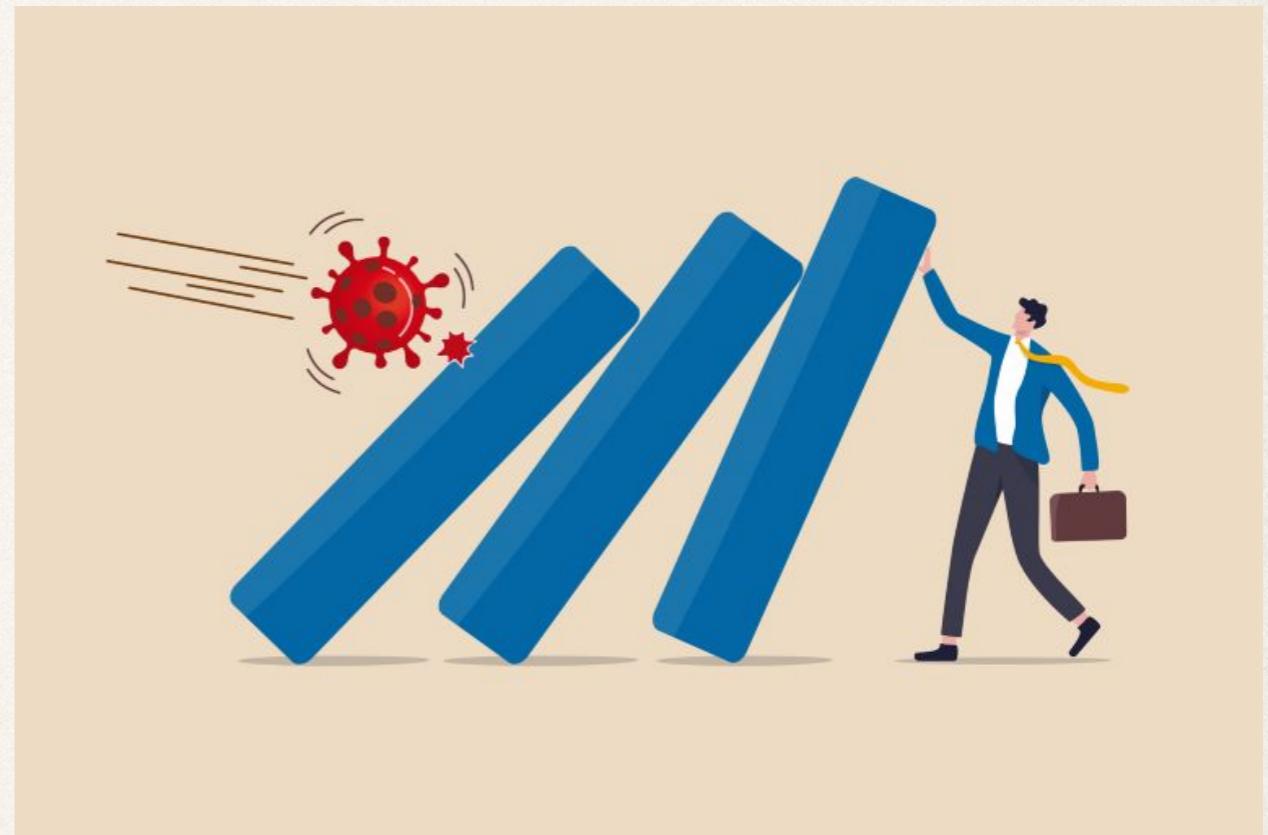
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March 2022

# Current Situation Overview

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- ❖ Zero COVID-19 Policy
- ❖ Prevention and Control Measures
- ❖ Flights Disruption
- ❖ Quarantine on Arrival
- ❖ Zero COVID-19 Policy
- ❖ Domestic Market Shift



# Domestic market tourism ‘boom’

## 2020-2021

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- ❖ Staycation is The New Vacation
- ❖ Self-driving Tours
- ❖ Comeback of Rural Tourism
- ❖ Nature Wonders
- ❖ Food Tours
- ❖ Study Tours/Family Tourism
- ❖ Hainan Island - The Great Rise of China’s Tropical Paradise



# Type of Chinese Traveller Change

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- \* FIT
- \* Small Groups
- \* Family Tours
- \* Wedding and Honeymoon Industry
- \* Study Tours



# Post COVID-19 Challenges

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- ⌘ Local and International Measures
- ⌘ Flights
- ⌘ Visa and vaccination policies
- ⌘ Safety Concerns and Local/International Policies

# Post COVID-19 Opportunities for European Stakeholders

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- ❖ Great Travel Desire
- ❖ Financial Power
- ❖ Remote Work Possibilities (FIT)
- ❖ FIT Travelers (relying on tour-operators)
- ❖ Family Tours
- ❖ Wedding and Honeymoon Industry
- ❖ Responsible and Sustainable Travel Practices

‘海内存知己，天涯若比邻’

*– Chinese Proverb*



# Contact

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Thank you for your support!  
衷心感谢您的支持！

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Shanghai, China

Photo source: [baidu.com](http://baidu.com)