

Research on the Development of Kunming Tourism Accommodation Industry

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Abstract—In recent years, with the rapid growth of China's tourism and accommodation industry, the scale of the industry has continued to expand, and new types of business have emerged. Based on the investigation and analysis of the tourism and accommodation industry in the western capital cities of Kunming, Xi'an, Chengdu and Guiyang, this paper puts forward the development trend and countermeasures of Kunming tourism accommodation industry.

Keywords—Kunming; tourism accommodation industry; research

I. INTRODUCTION

In 2018, Kunming achieved the total tourism revenue of 218.08 billion yuan, a year-on-year increase of 35.52%, and the total number of tourists received was 161 million, a year-on-year increase of 20.32%. By the end of 2018, Kunming had a total of 7882 tourist accommodation companies, 96 star-rated hotels, and a total of more than 200,000 rooms.

In 2018, the turnover of the accommodation industry in Kunming was 8.725 billion yuan, a year-on-year increase of

7.3%, and the growth rate dropped by 7.4 percentage points over the same period of last year. Among them, the turnover of the above-mentioned accommodations with a total turnover of 43.0% was 3.75 billion yuan, a year-on-year decrease of 0.5%, and the growth rate dropped by 12.1 percentage points over the same period of 2017. The tourist accommodation industry in Kunming continued to be sluggish, and the hotel room occupancy rate continued to decline. The growth rate of the tourism accommodation industry's turnover decreased significantly compared with the same period last year.

II. INVESTIGATION AND ANALYSIS OF THE STATUS QUO OF TOURISM ACCOMMODATION INDUSTRY

A. Scale of the Enterprises

In terms of the scale of enterprises, there are 183 enterprises (units) above designated size in Kunming, 350 in Xi'an, 1,114 in Chengdu (catering and accommodation), and 150 in Guiyang. (See "Table I")

TABLE I. COMPARISON OF THE SCALE OF ENTERPRISES IN FOUR CITIES IN 2018 (UNIT: HOME)

Unit type		Kunming	Xi'an	Chengdu	Guiyang	Remarks
Above designated size	Legal person	167	333	785	-	The data of Chengdu are for the accommodation and catering industry, and the rest are the data for the accommodation industry.
	Industrial activity unit	0	17	47	-	
	Individual household	16	0	282	-	
	Total	183	350	1114	150	
Below designated size	Legal person	1439	-	7351	-	
	Industrial activity unit	292	-	2373	-	
	Individual household	13860	-	8678	-	
	Total	15591	-	18402	-	

B. Enterprises' Revenues

According to the survey results, in 2018, the largest increase in the accommodation industry above designated size was in Chengdu, reaching 24.73%, and the growth rate in Kunming was relatively slow, at 7.3%. (See "Table II")

TABLE II. COMPARISON OF REVENUES OF ENTERPRISES IN FOUR CITIES IN 2018

City	Full-aperture turnover (100 million yuan)	Year-on-year (%)	Turnover above designated size (100 million yuan)	Year-on-year (%)
Kunming	-	-	87.25	7.3
Xi'an	113	10.8	66.6	11.5
Chengdu	1508	11.4	102.36	24.73
Guiyang	76.65	12.6	-	8

C. Number and Composition of Tourism Accommodation Industry

From the survey of the city's tourism accommodation industry, Kunming is the most, and Xi'an is the least; from the number of star-rated hotels, Chengdu is the most, and Guiyang is the least. (See "Table III")

TABLE III. NUMBER OF TOURIST ACCOMMODATIONS IN FOUR CITIES IN 2018 (UNIT: HOME)

City	Number of tourist accommodation industry	Of which: number of star hotels
Kunming	7882	96
Xi'an	5142	96
Chengdu	6997	102
Guiyang	5850	48

D. Comparison of Tourist Visits

In 2018, the largest number of tourists among Xi'an, Chengdu, Guiyang and Kunming was Chengdu, with 243 million passengers, more than 142 million passengers in Kunming, with a year-on-year increase of 15.77%; the fastest increase in tourism was in Xi'an, which was 36.46%, with 15.41 percentage points higher than Kunming. From 2015 to 2018, the number of tourists in Xi'an increased from 136 million to 247 million, an increase of 111 million, the number of tourists in Guiyang increased from 85 million to 188 million, an increase of 103 million; the number of tourists in Chengdu increased from 191 million to 243 million, with an increase of 52 million people; the number of tourists in Kunming increased from 0.69 billion to 161 million, with an increase of 92 million. It can be seen that in recent years, although the number of tourists in Kunming has grown rapidly, compared with Xi'an and Guiyang, there is still much potential and space for development. (See "Table IV")

TABLE IV. COMPARISON OF TOURIST ARRIVALS AND GROWTH RATES IN FOUR CITIES FROM 2015 TO 2018 (UNIT: 100 MILLION PERSON-TIMES, %)

City	2015		2016		2017		2018	
	Person-times	Growth rate	Person-times	Growth rate	Person-times	Growth rate	Person-times	Growth rate
Kunming	0.69	--	1.01	46.38	1.33	31.68	1.61	21.05
Xi'an	1.36	--	1.5	10.29	1.81	20.67	2.47	36.46
Chengdu	1.91	2.75	2.00	4.68	2.10	4.87	2.43	15.77
Guiyang	0.85	--	1.11	30.59	1.49	34.23	1.88	26.68

E. Tourism Income

In 2018, the highest total tourism revenue was in Chengdu, which was 370 billion yuan; the largest increase in total tourism revenue was in Xi'an, with a growth rate of

56.42%, 20.9 percentage points higher than Kunming. The tourism income of Kunming is the lowest among the four cities, which is lower than Xi'an, Chengdu and Guiyang, respectively, 37.47 billion yuan, 151.99 billion yuan and 27.65 billion yuan. (See "Table V")

TABLE V. COMPARISON OF TOURISM INCOME IN FOUR CITIES FROM 2015 TO 2018

City	2015		2016		2017		2018	
	Income (100 million yuan)	Growth rate (%)	Income (100 million yuan)	Growth rate (%)	Income (100 million yuan)	Growth rate (%)	Income (100 million yuan)	Growth rate (%)
Kunming	723.46	--	1073.5	48.39	1608.7	49.85	2180.1	35.52
Xi'an	1073.7	--	1213.8	13.05	1633.3	34.56	2554.8	56.42
Chengdu	2040.2	22.64	2502.3	22.65	3033.4	21.23	3700	21.41
Guiyang	1040.5	--	1389.5	33.54	1872	34.72	2456.6	31.23

F. Overnight Trips

In 2018, the largest number of overnight visitors in the four cities was Chengdu, with a total of more than 90 million. The proportion of overnight visitors reached 37.04%, 7.9 million higher than Kunming. The number of overnight stays in Kunming was 82.105 million, accounting for 51.6% of the total number, the highest among the 4 cities, and the average cost was 1035.68 yuan/day, higher than that of Xi'an and Guiyang, indicating that Kunming has great potential and space for development in the accommodation industry. (See "Table VI")

TABLE VI. COMPARISON OF OVERNIGHT TRIPS IN FOUR CITIES IN 2018

City	Person-times (10 thousand person-times)	Proportion of the total number of people (%)	Average cost (yuan/day)	Average stay days
Kunming	8210.51	51.60	1035.68	2.67
Xi'an	8276.56	33.60	More than 700	2.7
Chengdu	9000	37.04	--	3
Guiyang	2000	10.64	1300	--

G. Comparison of Major Tourism-generating Region

According to the survey results, the tourist sources of the four cities are quite different. The tourist sources in Xi'an, Chengdu and Guiyang are similar, mainly from developed regions such as Beijing, Shanghai, Shenzhen and other regions. Although Kunming has tourists from Guangdong, it is still dominated by tourists from major cities in the western region. This shows that the direction and focus of Kunming tourism promotion can be adjusted appropriately. (See "Table VII")

TABLE VII. COMPARISON OF MAJOR TOURISM-GENERATING CITIES IN FOUR CITIES IN 2018

City	Major tourism-generating region
<i>Kunming</i>	Sichuan, Guizhou, Guangdong, Chongqing
<i>Xi'an</i>	Xi'an, Beijing, Shanghai, Chengdu, Shenzhen
<i>Chengdu</i>	Chengdu, Beijing, Xi'an
<i>Guiyang</i>	Beijing, Guiyang, Wuhan, Shanghai, Chengdu

III. ACCURATELY GRASPING THE NEW TREND OF TOURISM ACCOMMODATION INDUSTRY DEVELOPMENT

A. The Tourism Accommodation Market Has Grown Significantly, and the Diversified Demand Has Changed Rapidly

In recent years, tourism consumption has become a necessity, and the tourism accommodation industry closely related to it has also ushered in key development opportunities. With the upgrading of consumer demand, higher requirements have been placed on the tourism accommodation industry, and diversified consumer demand needs to be met. From the perspective of Yunnan, the annual reception volume of Yunnan tourism is growing, and the number of scattered customers is increasing. This also changes the demand of the accommodation market. For the majority of consumers, star hotels are no longer the inevitable choice for business travel accommodation. In contrast to the sluggishness of star-rated hotels, the overall size of the tourism accommodation market is expanding, and more and more people are increasingly demanding resort-style hotels or more sophisticated, high-end international brand hotels. In the next five years, while star-rated hotels continue to play a role, the diversified development of the accommodation industry will be the main trend, the profitability of budget hotels will tend to shrink, and the mid- and high-end hotels, especially mid-end hotels, will come into a period of rapid growth.

B. Sharing the Economy, Restructuring Industry Structure, and Promoting High-tech Market Innovation

In the future, with the rapid development of modern science and technology, the role of distribution channels and sharing economy will become more apparent. The impact of technological changes will change the traditional business

model and management methods of the accommodation market. New market segmentation sharing platforms are emerging. The accommodation sharing economy is being accepted by more and more tourists and receiving a lot of financial support. The sharing accommodation industry is accelerating its expansion to second and third tier cities. Taking the Piglet Platform as an example, although first-tier cities are the mainstream market for shared accommodation, some popular second- and third-tier cities, such as Chengdu, Chongqing, and Xi'an, have experienced explosive growth. At the same time, the accommodation industry is learning and experimenting with artificial intelligence, biometrics, virtual reality, big data, Internet of Things, 3D printing and blockchain technology to make the accommodation industry more convenient and green.

C. The Allocation of Market Resources Will Be More Rational, and the Relationship Between Supply and Demand Will Tend to Be Balanced

In the future, the tourism accommodation industry will show an increasingly large, stable and diversified trend on the demand side. Although there are many imbalances in the supply side, in the long run, the structural reform of the supply side of the accommodation market will be accelerated and the business environment will be gradually improved. In particular, the market main consumers, the post-80s and post-90s, have the strongest desire for consumption upgrades and quality upgrades. The tourism industry's local consumption has formed a climate. The tourism accommodation market is more subdivided. The products are more abundant. The cultural value is more fully reflected, and the pace of renewal is faster.

IV. SUGGESTIONS ON PROMOTING THE DEVELOPMENT OF KUNMING TOURISM ACCOMMODATION INDUSTRY

A. Establishing a Clear, Scientific and Efficient Management Mechanism

Drawing on the experience of Xi'an and Chengdu, it should be attached great importance to innovate the management mechanism for the problems existing in the current management mechanism of the tourism accommodation industry, further clarify the responsibilities, refine the division of labor, and rationalize the relationship. Leading by the government, together with relevant functional departments, linkage industry associations and well-known enterprises, it will be necessary to set up the tourism accommodation industry linkage development office, open up horizontal barriers, work closely together to form a joint force, strengthen the combination of boxing, strengthen departmental linkage, and strive to create a good environment for industry and enterprise development. It will also be important to further strengthen the service awareness of relevant management departments, optimize service methods, and jointly promote the development of the tourism accommodation industry. In view of the huge demand of the mid-end accommodation market and the homestay, it is recommended to clarify the main responsible departments of the mid-end hotel and the hotel, and accelerate the

development of the mid-end accommodation market and the hotel market.

B. Giving Full Play to the Role of Industry Associations

Great importance should be attached to the role of the tourism accommodation industry association and guiding it to play a greater role in communicating with the government and enterprises, regulating industry behaviors, reflecting corporate demands, and strengthening industry self-discipline. Drawing on the experience of Chengdu, it will be of great importance to speed up the establishment of an industrial operation mechanism of "government planning guidance, industry association coordination and self-discipline, enterprise development", improve the industry management and coordination mechanism, and improve the joint conference system for promoting the development of tourism accommodation industry to coordinate and coordinate the development of tourism accommodation industry in the city. It is also necessary to accelerate the establishment of the tourism accommodation industry integrity mechanism, incentive mechanism, industry self-discipline mechanism, development assessment mechanism, etc., so that the government, industry associations and enterprises can form a synergy. The competent commercial department shall give full play to the role of the association, entrust and support the association to carry out standards development, qualification recognition, training and education, display and exchange, information statistics, skill competition and other work. It will be necessary to give support for the pre-employment training of employees' skills and on-the-job continuing education and training for the expansion of employment and reemployment. Industry associations should regularly hold industry linkage development cooperation forums, bringing together industry leaders, experts and scholars to discuss industry linkage development strategies.

C. Accelerating the Establishment and Promotion of Industry Standards

It is important to increase government service and support to help companies do a good job in service quality. The competent commerce departments need to actively carry out the combing and research on the relevant policies and regulations of the tourism accommodation industry, and propose the rules and regulations. In the aspects of market regulation, management, ranking and administrative services, it will be necessary to formulate policies that are conducive to business management and industrial development, and establish an institutional and regulatory system, policy effect tracking and evaluation system and policy service system that are conducive to the development of the city's tourism accommodation industry. It will be an important work to do a good job in publicizing and explaining various policies to help enterprises eliminate concerns, guide enterprises to use various supporting policies, and promote local norms such as industry norms, classification standards and development guidance for tourism accommodation industry to speed up formulation and promotion. It will be also necessary to vigorously carry out the establishment of high-quality service demonstration enterprises, cultivate a group of brand

accommodation enterprises and outstanding entrepreneurs, expand brand demonstration and driving effects, and make the tourism accommodation industry service become a famous brand in Kunming and another new business card in Kunming.

D. Creating an Accommodation Brand with Distinctive Characteristics

Kunming has a strong minority culture and rich folk customs. It is necessary to integrate the city's resource advantages, fully absorb local elements, and vigorously develop global tourism products that include travelers, special vehicles, specialty catering and other high-quality services, as well as creating minority cultural theme plazas, neighborhoods, and hotel inns to further improve related infrastructure. With the hotel's regional tourism resources and in-depth display of the essence of local culture, tourism brands and accommodation brands with Yunnan ethnic characteristics will be created. It will be a very important work to attach great importance to the use of cultural creativity in the accommodation industry in Kunming, increase the innovation of hotel interior decoration and accommodation product packaging, integrate more Kunming's history, culture and regional characteristics, and tell the "Kunming Story" to make Kunming travel accommodation more added value. At the same time, in the low season and peak season and different regions, in the hotel room and attractions' tickets, it can make great impact to timely introduce attractive preferential policies for foreign tourists, to attract more tourists to Yunnan. In particular, it is necessary to carry out in-depth excavation and analysis of the reasons why tourists in developed regions are not the main source of tourists in Yunnan, and develop solutions and countermeasures for the reasons to attract more tourists from developed regions and coastal areas to travel to Yunnan.

E. Accurately Locating and Segmenting the Target Market

Based on the growing desire for consumption upgrades and quality upgrades, and the rapidly changing diversified needs of the main body of consumption, post-80s and post-90s, of the accommodation market, the Kunming accommodation industry must accelerate the supply-side structural reforms, guide the development of enterprises, and do everything possible to improve the effective supply of the accommodation industry. First is to guide and support the tourism accommodation enterprise groups to grow larger and stronger and develop innovatively which are in the forefront of the industry in terms of scale of operation and benefits, and have obvious competitive advantages, strong brand influence and wide network coverage. It will be of great significance to make the leading enterprises larger and stronger, increase the support for five-star hotels and international brand hotels, give full play to its demonstration and driving role, and enhance the core competitiveness of the industry. The second is to focus on cultivating large-scale enterprises, increase the promotion and marketing efforts of mid-end hotels, encourage existing three-star and four-star hotels to be upgraded, and improve their management experience and service level by organizing training exchanges and going out to study. The third is to support the

B&B and boutique hotels to improve and upgrade. Through policy support, it will be the necessary work to guide a group of potential B&Bs to take the road of quality development, improve service levels and form high-quality high-quality B&B. At the same time, in view of the fact that the tourism accommodation industry's consumption in the same city is gradually forming a climate, it is necessary to increase the publicity and guidance of local residents in Kunming on weekends and small holiday vacations, and reduce the outflow of tourists.

F. Innovating and Broadening Marketing Methods

The impact of technological change has changed the traditional business model and management style of the accommodation market, and the role of distribution channels and economy sharing has become more prominent. To speed up the development of tourism accommodation industry in Kunming, it is necessary to actively use high-tech and new market segment sharing platforms to continuously expand marketing channels. First is to learn from the experience of Xi'an and integrate the "cyber celebrity economy" to improve the reputation and awareness of the Kunming accommodation industry, as well as actively cooperating with well-known apps to promote and popularize Kunming's customs, food restaurants and special attractions, and attract more visitors to Kunming and living in Kunming. At the same time, it is necessary to do a good job of corresponding management, to put an end to the hidden dangers of integrity behind the "cyber celebrity economy". Second is to actively develop online marketing methods such as online services, online reservations, online payment, self-service reservation and settlement, gradually expand online reservations, mobile phone reservations, reduce transaction costs, guide different levels of consumer choices in the market, close supply and demand docking, and facilitate accommodation consumption. The third is to fully develop the convention and exhibition economy, "using the convention to drive accommodation and using the exhibition to drive accommodation" The integrated development of the exhibition economy and the accommodation industry is listed as the key task of the city's economic development, actively undertaking major conventions and exhibitions and events, and intensifying efforts to recruit and attract large-scale exhibitions, international events, international conferences, etc. It will be very important to innovate the holding thoughts of conventions and exhibitions, promote the integration of "convention and exhibition + tourism" industry, promote the new format of exhibitions, and focus on cultivating the award-winning tourism projects. Great attention should also be attached to organize national and international accommodation industry exhibitions, carefully select industry leaders to introduce advanced experience, and learn from advanced management experience to enhance the overall visibility of Kunming's tourism accommodation industry.

G. Optimizing Statistical Service Guarantee

First, the management of statistical literers and warehousing must be earnestly strengthened. In order to grasp the registration and operation of accommodation

enterprises in a timely manner, it will be necessary to strengthen the management of the storage and storage of accommodation enterprises above designated size, and do a good job in enterprise services. Local governments at all levels shall establish a linkage working mechanism consisting of departments such as business, taxation, industry and commerce, public security, statistics, and sub-district offices, and timely sort out the current status of registered travel accommodation enterprises to implement the dynamic management of legal person (individual) units of accommodation companies that meet the conditions for entry and storage. Attention should be paid to strengthen the training of enterprises in the library, and require enterprises to conscientiously study and understand statistical laws and regulations and statistical systems, avoid unintentional false negatives and false reports caused by incorrect understanding of the statistical system, and improve the quality of data filing. At the same time, based on the small proportion of accommodation enterprises above designated size and the increasing number of accommodation companies below designated size, it should attach great importance to timely screen out high-quality accommodation enterprises with growth space to make overall plans and reserves, and increase the support for these enterprises. Second, the propaganda and recommendation of accommodation enterprises above designated size must be increased. For the business-restricted accommodation enterprises, they will continue to increase their propaganda and recommendation. In the screening of the hospital's annual tender meeting, the priority access mechanism will be established. Accommodation enterprises with the same conditions above the designated size will be selected first. Third, the construction of a statistical evaluation system must be speeded up. It is necessary to establish a statistical system focusing on the tourism accommodation industry, continue to conduct sample surveys and monitoring analysis of accommodation enterprises, quantity, scale and operation status, and provide scientific basis and decision-making reference for the completion of industry management and indicators. It is also very important to promote the classification of enterprises, introduce a third-party evaluation mechanism, focus on the refined evaluation of hotels, inns, etc., support the standardization construction of the city's accommodation industry enterprises, and improve the accuracy of policy funding, evaluation and rewards.

V. CONCLUSION

At present, the tourism accommodation industry is in the critical period of transformation and upgrading of consumption upgrading, industrial restructuring, and industrial chain reshaping. The upstream and downstream industrial chains are further integrated, and "accommodation + X" has become a model for industry development. In the future, the growth rate of China's high-end hotels will slow down, and mid-end hotels will usher in great development opportunities. From a regional perspective, the urban-rural distribution will be more optimized and balanced. From the business point of view, the new format will be more abundant. Rental apartments, resort hotels, theme hotels, health and wellness hotels, green hotels, hotel hotels,

boutique inns, etc., will usher in greater development. At the same time, the power of capital and technological innovation will drive the new business, new models, new services and new products of the lodging industry to emerge and grow rapidly. The tourism accommodation industry in Kunming must seize the opportunity to build the tourism accommodation industry into a support point for the transformation and upgrading of Kunming tourism, become a breakthrough point for the promotion and integration of Kunming tourism industry and a new growth point of Kunming tourism economy, and promote the leap-forward development of Kunming tourism.

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