

云南省高等教育自学考试旅游管理专业教材

旅游学概论

主编 王子华 李大金

云南人民出版社

序 一

发展旅游业，必须重视旅游教育

云南省旅游局局长

李禄安

旅游业是当今世界上充满生机活力和发展势头最强劲的经济产业。在一些经济发达国家，旅游已成为人们生活的一项基本内容。我国实行改革开放以来，旅游业兴旺蓬勃、长足发展。随着社会主义市场经济体制的逐步确立和国民经济的持续发展，综合国力的增强，我国旅游业将全面快速发展。世界旅游组织专家预测，到本世纪末，中国将成为世界上最大的旅游国。

我省旅游业起步较晚，但发展迅猛，成绩可佳。我们从云南实际出发，对外加大促销力度，对内大力发展旅游生产力，培育和发展的国际、国内两个市场，经过十多年的奋力开拓，使国际旅游和国内旅游都取得了丰硕成果。尤其是进入 90 年代以来，云南旅游业取得了突破性发展，不论是接待人数，还是旅游创汇，都已进入我国重点旅游地区行列。

云南神奇而美丽，山川壮丽、气候宜人、四季飞花，有植物王国、动物王国、歌舞王国之美誉，旅游资源极为丰富，不论是自然风光、人文景观，还是民族文化都极具特色，对国内外旅游者有着巨大的吸引力。最近，省委、省政府已把我省旅游业作为一大支柱产业来发展，云南发展旅游得天时、占地利、有人和、前景广阔。为此，我们必须抓住机遇，加快发展，使云南旅游业再上一个新台阶。

要使我省旅游业再上一个台阶，有许多工作需要我们去踏踏实实地去做。譬如，要强化旅游发展的观念，提高全民旅游意识，加强全行业正规化、标准化管理，强化管理意识，树立市场观念，增强竞争意识等，但最重要的则是旅游人才的培养。为适应我省旅游业持续高速发展的需要，旅游教育培训工作必须加强。旅游业是经济与文化高度结合的产业，专业技术人才是旅游业的中坚，是旅游企业赖以生存和发展的灵魂，在云南旅游从传统旅游向现代旅游的转变过程中，培养大批有一定学历、高水平、精通业务的旅游专业技术人才势在必行。

今年初，云南省自学考试指导委员会下发了“关于我省开考高等教育自学考试旅游管理专业（专科）的通知”文件，填补了我省高等教育自学考试缺乏旅游管理专业的空白。在我省开考这个专业，对我省旅游专业人才的培养又多了一项措施，增添了一条渠道。培养人才的路子很多，自学成才也是一条。我希望，我省旅游从业人员和有志于旅游行业工作的同志，通过各种渠道努力学习旅游专业知识和基本理论，提高自己的专业理论水平和实际工作能力，更好地为我省旅游业服务。

由云南省旅游局有关处室、云南民族学院中文系和昆明大学旅游系共同组织编写的《云南省高等教育自学考试教材》可以满足我省广大旅游管理专业自学考试学生的需要。我相信，这套教材的编写出版，将会对我省旅游高等自学教育和旅游人才的快速培养，起到积极作用。

1995年5月1日

Preface (I)

(to the textbooks for the self-taught students majoring in tourism management)

Tourism has now become an economic industry overflowing with vigour and being on the momentum of the quickest development. For the people in some economically developed countries, taking a tour has become a basic part in their life. Since the Reform in China, tourism has been developing fast. With the system of the socialist market economy being gradually established, with our national economy being steadily developed, and with our integrated national power being further strengthened, tourism in China will enjoy a quicker development in all its aspects. Experts from different tourist organizations of the world predict that China will have become Number One tourist country in the world by the end of this century.

Though tourism in Yunnan started rather late, it has developed very fast and has already made praise worthy achievements. By acting according to the actual circumstances in Yunnan, we have been strengthening the external marketing of Yunnan's tourism, and have been devoting ourselves to the development of tourist productivity in Yunnan. With more than ten-year's continued efforts in perfecting tourism, we have made unprecedented

achievements both at home and abroad. Especially since 1990, tourism in Yunnan has enjoyed a breakthrough in its development. Evaluated either by the number of tourists or by the earnings in hard currency, Yunnan has now been ranked as a key tourist province in China.

Yunnan, a beautiful and mysterious province with magnificent mountains, a mild climate and countless everbloomingers, has been praised as the "Plant Kingdom", the "Animal Kingdom" and the "Song-and Dance Kingdom". With its unique natural scenery, cultural sights and ethnic cultures, Yunnan is well known for its rich tourist resources and offers many attractions to tourists from all over the world. The Provincial Party Committee and the Provincial Government of Yunnan have recently agreed to develop tourism as a key industry in Yunnan. With this golden opportunity in hand and with its topographical advantages and its people's support, tourism in Yunnan will surely have broader prospects. Therefore, we must grasp every new opportunity and make new progress in its quickened development. To achieve this, there is much work for us to do in a down-to-earth way. For example, we should strengthen our sense of developing tourism and help all the people have a better understanding of tourism. We should also regularize and standardize tourism management, strengthen our sense of scientific management, deepen our comprehension of the tourist market and strengthen our sense of competition. But the most important of all is the training of qualified personnel. In order to satisfy the need of a fast and steady development of tourism in Yunnan, we must further improve our personnel training work. Tourism is a highly-combined industry of

economy and culture, and its specialized personnel is the backbone and soul on which every tourist industry depends. During the transition from a traditional made to a modern one within the tourist industry in Yunnan, the training of many qualified people with some educational background must be enforced.

Early this year, Yunnan self-study Examination Guiding Committee issued a document, officially agreeing to hold higher education examinations for the self-taught students majoring in tourism management (junior college education programme), which has filled in the gap in the higher education examination programme for the self-taught in Yunnan. Among other things, this will surely help the training of qualified personnel in this field and offer a new approach to success for those who want to engage themselves in tourism. I cherish the hope that the people in the tourist circle and others who want to devote themselves to tourism will diligently study its basic theory and acquire as much professional knowledge as possible through various channels. In this way I think they will be able to raise their theoretical level and improve their professional skills, and provide better service for tourism in Yunnan.

The Textbooks for the Higher Education Examination for the Self-taught Students in Yunnan, co-compiled by the departments concerned from Yunnan Tourism Bureau, the Chinese Department of Yunnan Institute for Nationalities and the Tourism Department of Kunming College, can meet the needs of the self-taught students majoring in tourism management. I believe the publication of this series of textbooks will play a positive role in helping improve the training of qualified personnel in tourism and in helping

*raise the educational level for the self-taught students majoring in
tourism management in Yunnan .*

Li Luan

Director of Yunnan Tourism Bureau

May 1st, 1995

序二

旅游业与旅游学

黄惠焜

旅游业是一门经济产业。在现代诸经济产业中，它举足轻重，最赋魅力。它关乎着一个国家的国民经济收入，也关乎着一个地区的地方财政收入。它可以富国，可以富民，也可以塑造国家的形象，可以展示民族的文化财富，可以沟通国家之间的经济文化交流。不能设想一个没有旅游业的国家它怎么面对世界！是人们不愿意去它那里旅游？抑或是它没有能力吸引人们去旅游？

旅游业又是一门文化事业。在现代诸文化事业中，它同样是举足轻重，最赋魅力。它是在开发文化价值中实现经济价值，又借助经济的开发实现文化价值。在文化和经济的双向交流中，实现民族文化的传承，实现民族文化的重构，实现整个国家社会主义精神文明的建设。不能设想一个没有文化目的的旅游它怎么维持旅游业的再生产？当今的旅游消费已经升华为文化消费，当今的旅游者大多是文化旅游者！

由是观之，当今的旅游业和旅游者是一组相辅相成、相得益彰的概念。没有旅游业，旅游者何所选择？没有旅游者，旅游业何所依托？如果你是一个旅游业的组织者，那么，你首先应当想到旅游者；如果你是一个旅游学的教育者，你首先应当想到的仍然是旅游者。因为，旅游者的来源与构成、兴趣与选择、素质与

层次，将影响着旅游的样式、管理的结构和旅游的效益。从这一角度立论，在旅游学这一大概念中，旅游者为主体，旅游业是受体。我想强调一下旅游主体论，希望多一些对旅游者的研究。

古典旅游和现代旅游在手段上已经大不相同，但在旅游的宗旨上却颇相近似。如果用最简单的文字表述它们的共同点，那便是求知与求美。所谓求知，那是充实文化的追求；所谓求美，那是完善精神的塑造。古人说：“读万卷书，行万里路”，那是求知。至于说：“遥吟俯畅，逸兴遄飞”，那便是求美。

还有一种回归感。回归到自然，回归到原我。静憩于松柏之间，垂钓于溪壑之上；远离城市之喧嚣，忘却伏案之劳神。这是为了重建精神和心理的平衡。发达世界，尤其如此。

还有一种怀古情。想了解自己的祖先，了解自己的文明。工业化让人们得到了许多，也让人们失掉了许多。这联系着人们的自尊与自豪。因为人们总是因为有辉煌的过去而自尊自豪。

还联系着一种文化比较观。由此带来对异文化的求知欲。从文化学的观点而言，比较，这是文化研究的基础。人们往往在认识异己中认识自我。不能认识别人，便不能认识自己。“他视”是为了“内视”，“内视”离不开“他视”。

至于老幼之间、男女之间、区域之间、层次之间，均因其文化背景之不同而产生不同的旅游选择和旅游情趣，则不可一一绳之，当分别斟酌。好在本丛书已有“旅游者”专章论述，予兹不赘。

我期望着丛书的全面成功，期望着因丛书（教材）的出版发行而大大推动云南省的旅游事业！

1995·5·28·

于云南民族学院

Preface (II)

(to the textbooks for the self-taught students majoring in tourism management)

Tourism with its irresistible charm plays a decisive role in modern economic industries and has much to do with the national income of a country and the local income of a region . It can enrich the state and benefit the people . It can help create a good image of a country and reveal the cultural treasures of a nation . It can also help improve the economic and cultural exchanges between different countries . It is unimaginable that a country without tourism can face up to the world with confidence . People may ask the following questions : Are tourists unwilling to pay a visit there ? Or is it unable to attract tourists ?

Tourism with its special charm also plays an important part in modern cultural undertakings . It obtains its economic value through the exploitation of its cultural value , or vice versa . In this two-way exchange , the national culture will have been inherited and reconstructed , and a socialist civilization with a high cultural and ideological level will have been built . It is also unimaginable that a tour without a cultural objective can maintain its reproduction in tourism . Today most tourists have a cultural objective and this means that the pattern of consumption in tourism has a clear cultural orientation . Therefore , tourism and tourists , having formed a combined concept , are inseparably interconnected

and can benefit each other. If there were no tourism, what would tourists choose? Or if there were no tourists, on what would tourism depend? If you are a manager of tourism or an educator in the field of tourist studies, the first thing which occurs to you must be tourists. As a result, tourists from different places with different choices, interests, qualities and levels will exert their influences not only on the management mode and structure of tourism but also on the economic and social benefits of tourism. Judging from this point of view, in tourist studies tourists are the principal part on which tourism relies. I want to emphasize this point and expect that, there will be more studies of tourists.

The modern means of travelling are quite different from those in the past but the objectives and interests of the travellers in different ages are quite similar. Two simplest phrases which I can find, "to acquire knowledge" and "to seek beauty", may well reveal their common points. "To acquire knowledge" means "to constantly enrich the mind with knowledge", and "to seek beauty" means "to acquire a broader mental outlook". "To read ten thousand books and to travel ten thousand miles", as the ancients said, means "to acquire knowledge", and "to chant and recite with appreciation and relish" means "to seek beauty".

There exists a sense of returning to nature and to ego in travelling. To have a rest in the quiet pine and cypress trees, to fish in the streams and gullies, and to be far away from the noisy cities and from your hard work can help you retain a psychological balance. This is especially true of the people living in the developed countries.

There also exists a nostalgic feeling. People living in this in-

ustrialized age want to know more about their ancestors and their past civilization. Man has obtained much from industrialization but at the same time he has also lost much. This feeling has much to do with the self-esteem and pride of human beings because we always take a pride in and have a great esteem for our glorious past. Culturally speaking, this has much to do with a comparative viewpoint which leads to a strong desire for an understanding of different cultures. Judging by the viewpoint of the science of culture, people often get to know themselves through an understanding of others; otherwise, they often fail to understand themselves. In other words, "to know others" implies "to know oneself better", and vice versa. Because tourists with different levels and cultural backgrounds are of all ages and both sexes and from different places, their choices and interests vary from person to person, and one standard cannot satisfy their needs. Readers will happily find one chapter titled "Tourists" in one of these books which deals with this point.

I hope this series of books will be a great success and I also expect the publication of this series of books will give great impetus to the improvement of tourism in Yunnan.

Professor Huang Huikun
Vice President of Yunnan
Institute for Nationalities
May 28th, 1995

目 录

| | |
|--------------------------|-------|
| 序一 | 李禄安 |
| 序二 | 黄惠焜 |
| 第一章 绪论 | (1) |
| 第一节 旅游学研究对象 | (1) |
| 第二节 旅游学的特征 | (12) |
| 第三节 学习和研究旅游学的意义和方法 | (21) |
| 第二章 旅游的产生和发展 | (27) |
| 第一节 19 世纪中叶以前的旅行活动 | (27) |
| 第二节 近代旅游的发展和旅游业的开端 | (40) |
| 第三节 现代旅游的发展及其原因 | (46) |
| 第四节 中国旅游业的产生和发展 | (57) |
| 第三章 旅游者 | (65) |
| 第一节 旅游者的含义 | (65) |
| 第二节 实现旅游活动的基本条件 | (73) |
| 第三节 旅游者类型及特点 | (89) |
| 第四章 旅游资源 | (96) |
| 第一节 旅游资源的含义 | (96) |
| 第二节 旅游资源的分类与特点 | (100) |
| 第三节 旅游资源的开发与保护 | (107) |
| 第四节 旅游资源的合理使用 | (117) |
| 第五章 旅游业 | (127) |
| 第一节 旅游业 | (127) |
| 第二节 旅行社 | (132) |
| 第三节 旅游交通业 | (138) |

| | | |
|-----|-----------------------|-------|
| 第四节 | 旅游饭店业 | (145) |
| 第五节 | 旅游产品和旅游设施 | (154) |
| 第六章 | 旅游市场 | (160) |
| 第一节 | 旅游市场的概念及特点 | (160) |
| 第二节 | 旅游的客流规律和旅游市场的划分 | (166) |
| 第三节 | 我国的旅游市场 | (174) |
| 第四节 | 旅游市场营销 | (183) |
| 第七章 | 旅游业在国民经济中的作用 | (195) |
| 第一节 | 旅游业的经济地位 | (196) |
| 第二节 | 旅游业的经济作用 | (200) |
| 第三节 | 旅游业的经济影响 | (213) |
| 第八章 | 旅游业的社会文化影响 | (218) |
| 第一节 | 旅游与社会文化 | (218) |
| 第二节 | 旅游对社会文化的积极影响 | (224) |
| 第三节 | 旅游对社会文化的消极影响 | (230) |
| 第四节 | 抑制旅游对社会文化的消极影响 | (234) |
| 第九章 | 旅游组织和旅游政策 | (238) |
| 第一节 | 旅游组织 | (239) |
| 第二节 | 旅游政策 | (251) |
| 第十章 | 旅游发展的途径和趋势 | (259) |
| 第一节 | 旅游发展的途径 | (259) |
| 第二节 | 我国旅游发展的途径 | (267) |
| 第三节 | 旅游的发展趋势 | (274) |
| 后 记 | | (281) |

第一章 绪 论

旅游是人类社会经济文化发展到一定水平的产物。它是人类社会生活的一项重要内容。随着社会生产力的大发展、科学技术的进步和 人民物质文化生活水平的提高，旅游已逐渐成为全民性的社会经济文化现象，成为人类物质生活和精神生活的基本组成部分，成为人们向往的愉快而美好的一项活动。旅游作为一项重要的社会经济现象，有其特殊的经济活动规律；作为一种全民性的社会文化现象，有其复杂的运动过程；它对社会物质文化生活产生巨大的影响。随着旅游的发展，旅游业和旅游学也就应运而生。旅游学是以旅游为研究对象的一门新兴学科。

第一节 旅游学研究的对象

一 旅游及旅游学的定义

1. 旅游的定义

旅游学研究的对象是旅游。旅游的确切含义是什么？给旅游下一个科学的定义，是我们学习《旅游学概论》这门课程首先要解决的问题。给旅游下一个科学定义，不仅对旅游的理论探讨有

价值。对旅游的实践活动也具有重要意义。长期以来，人们从不同的角度、不同的目的出发，给旅游下过不尽相同的定义。这些定义主要有：

①交往定义。1927年，德国以蒙根·罗特为代表的派学者在他们出版的《国家科学词典》中给旅游下的定义是：旅游，狭义的理解是那些暂时离开自己的住地，为了满足生活和文化的需要，或个人各种各样的愿望，而作为经济和文化商品的消费者逗留在异地的人的交往。这个定义是从语言学研究的角而下，在德语中，旅游是由“陌生者”和“交往”两个词复合而构成的。换言之，旅游是“陌生者交往”。这个定义强调“人的交往”这层意思，所以人们称之为交往定义。

②综合定义（又称国际定义）。1942年，瑞士学者汉泽克尔和克拉普夫在他们合著的《普通旅游学纲要》中给旅游下的定义是：旅游是非定居者的旅行和暂时居留而引起的现象和关系的总和。这些人不会导致永久居留，并且不从事任何赚钱的活动。这个定义是从理论研究的角度而下的，它的突出特点是，不把旅游看作是某种单纯的活动，而是把旅游看作是一种复杂的社会经济关系的总和，揭示了旅游现象的综合性。即游客与旅游地、旅游企业之间存在着经济联系，游客与旅游地居民之间会发生一定的社会关系。这一定义于70年代被“旅游科学专家国际联合会”（AIEST）所采用，所以被称为国际定义，又称为AIEST（艾斯特）定义。应该指出，这个定义中的“不从事任何赚钱的活动”的表述不妥。

③目的定义。50年代，奥地利的维也纳经济大学旅游研究所给旅游下的定义是：“旅游可以理解成是暂时在异地的人的空余时间活动，主要是出于休息；其次是出于受教育，扩大知识和交际的原因的旅行；再是参加这样或那样的组织活动，以及改变有关的关系和作用。”

1966年，法国学者让·梅特森给旅游下的定义是：“旅游是一种消闲的活动，它包括旅游或在离开定居地点较远的地方逗留。其目的在于消遣、休息或为了丰富他的历史和文化教育。”这两个定义都是从旅游者的旅游目的的角度而下的。它们的特点是浅显而通俗，并强调“旅游目的”在旅游定义中的作用，揭示出了旅游有明确的目的性。所以被称为目的定义。

④流动定义。1972年，英国萨里大学的伯卡特和梅特利克给旅游下的定义是：“旅游发生于人们前往和逗留在各种旅游地的流动，是人们离开他平时居住和工作的地方，短期暂时前往一个旅游目的地运动和逗留在该地的各种活动。”英国旅游局前执行主任里考瑞什给旅游下的定义是：旅游“是人的运动，是市场的运动而非一项产业的运动，总之，是流动人口对接待地区及其居民的影响。”这两个定义都是从旅游“流动特征”的角度而下的。它们揭示了旅游的流动性本质特征，但对旅游活动的暂时性未作明确限制。它们被称为流动定义。

⑤时间定义。1979年，美国通用大西洋集团有限公司马丁·普雷博士到中国讲学时给旅游下的定义是：“旅游是为消遣而进行旅行，在某一国家逗留的时间至少超过24小时。这一定义显然是给国际旅游下的定义，它是从统计游客数量的角度而下的。‘在某一国家逗留的时间至少超过24小时’，必定住宿过夜，这就便于根据旅店住宿统计游客人数。这个定义的特点是对旅游者‘逗留时间’有明确规定，这一方面便于统计工作，另一方面显示出其片面性。它被称为时间定义。

⑥距离定义。加拿大政府部门给国内旅游者下的定义是：旅游者指到离开其所居社区边界至少50英里以外的地方去旅行的人。1973年美国国家旅游资源评审委员会也提出类似的定义：旅游者是指为了出差、消遣、个人事务，或者出于工作上下班之外的其他任何原因而离家外出旅行至少50英里（单程）的人，