

LÜYOUXUE

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高等院校
旅游专业系列教材



China's Tourist Markets: An Overview

中国旅游 客源市场概况

(中英双语)

周昌军 周红雨 编著



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前 言

经过二十多年的努力，中国的旅游业实现了突飞猛进的发展，取得了举世瞩目的成绩。2006 年，中国的入境旅游人数和国际旅游收入分别居世界第四位和第五位。目前，中国已经成为最受国际旅游者关注的旅游目的地之一。根据世界旅游组织的预测，到 2020 年，中国将成为世界第一大旅游目的地国家。根据系统理论，旅游系统是由目的地和客源地两大系统构成的。作为目的地国家，我们应当加强对我国入境旅游客源市场的深入研究，加深对客源国和地区的全面认识与了解，有的放矢地开展宣传促销活动，进一步开拓市场，从而推动我国入境旅游持续稳定发展。对于管理部门和旅游业界，研究客源市场具有十分重要的现实意义；对于旅游专业的学生而言，较全面地了解客源市场知识是以后从事旅游工作的重要基础。因此，客源市场是旅游管理专业学生的一门重要基础课程。

进入 21 世纪以来，教育部十分重视高校双语教学工作，并提出了明确的指标。不少有条件的院校掀起了双语教学的热潮，并取得了初步成效。但由于双语教学在我国刚刚起步，目前还存在较多的制约因素，其中一个关键制约因素是双语教学教材较为紧缺。旅游管理是我国高校中的新兴专业，涉外性较强，开设双语课是十分必要的。考虑到既要符合本专业教学要求，又要便于教师授课和学生接受，选择“中国旅游客源市场概况”作为双语教学课程具有诸多优势，一是该课程实用性强，通俗易懂；二是学生在中学阶段都学习过世界历史和世界地理的相关知识，对各国的基本情况较为熟悉。

目前国内同类双语教材少之又少，已有教材都存在这样或那样的不足之处，不适应教学实际需要。因此，编写一本实用性强、通俗易懂的教材是当务之急。本书正是在这样的背景下，将编著者在长期教

学与科研过程中积累的大量资料整理、编撰而成。本书在编写过程中体现了如下几个创新点。一是关于我国入境旅游客源市场的重新划分。本书在全面分析我国入境旅游发展历史及发展趋势的基础上,选取了客源保持较稳定的三个地区和十六个国家作为我国入境旅游的主要客源市场。已有的研究成果或教材习惯于按照传统的旅游区或大洲为界限对我国的入境旅游客源市场进行划分,这样体现不出市场的特征。本书按照距离远近将我国的客源市场划分为周边市场、中程市场和远程市场,将原属于欧洲的俄罗斯市场划入周边市场,将原属于亚太地区的澳大利亚划入远程市场。二是在编写内容上,在介绍我国旅游客源国或地区概况的基础上,侧重突出了与市场选择关系密切的内容,如经济状况、人口特征、文化因素等,同时用大量篇幅尽可能详细地分析该国或地区的入境旅游和出境旅游发展状况,最后把落脚点放在该国或地区作为我国客源市场的分析上,包括市场现状、市场特征、存在问题及对策分析等。这样做的目的是充分体现市场研究的特色,而不是像有些教材一样,将重点放在该国或地区的旅游资源介绍上,结果市场概况成了目的地概况。三是在教材结构体系上,采取了汉语导读与英语正文相结合的方式,便于读者学习和理解。四是在资料运用上,尽可能搜集到最新统计数据,很多地方都用到了2007年的数据,以体现旅游研究的最新成果和旅游发展的最新动态和变化趋势。本书提供的资料数据翔实可靠,既可供旅游专业学生用作教材,又可供研究人员参考之用。

本书编著者虽然竭尽全力,但由于学识和能力所限,加之时间仓促,仍然深感编写一本双语教材所面临的困难和书中存在的不足。书中部分内容的介绍、分析不够全面,有些数据的来源较多,各个出处又存在不一致的问题,编著者尽可能采纳世界旅游组织和世界银行等权威组织公布的资料。有些数据尚存在空缺现象,留待以后补充完善。如有与其他来源数据存在较大矛盾的地方及其他错误之处,敬请读者和同行、专家批评指正。

本书在编写过程中,查阅了大量资料,在书后参考文献中未能一一列出,在此一并向资料来源处表示感谢,并向遗漏的作者和单位表

示歉意。

本书由周昌军、周红雨合作编著而成。周昌军负责第一章至第五章；周红雨负责第六章至第八章。本书的完成还要特别感谢山东师范大学旅游系的何佳梅教授和南开大学出版社的彭海英女士。她们在紧张的工作之余为本书提出了许多宝贵意见，提供了大力支持，使本书得以尽快与读者见面。

编著者

2008年5月28日

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Chapter 1

World Tourism: Yesterday, Today and Tomorrow

OBJECTIVES

After more than one hundred years of development, tourism has grown to be the largest industry in the world and plays a more and more important role in world economy and people's life. After studying this chapter, you should have a clear view of the history of world tourism, understand the important trends of today's world tourism, which is the key point of this chapter, and know the world tourism's tomorrow forecast by the World Tourism Organization.

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➤ **World Tourism's Yesterday: A Brief Historical Review**

Origin and Development of Early Travel Activities before 1840

Travel Activities and the Beginning of Tourism Industry before 1950

➤ **World Tourism's Today: Important Trends**

Reasons of the Rapid Development of Modern Tourism

Features and Important Trends of Modern Tourism

Leading Destinations and Tourist-Generating Countries

➤ **World Tourism's Tomorrow: 2020 Vision**

本章导读

本章主要分析了世界旅游业的发展过程,重点探讨了二战后现代旅游业的发展趋势、世界主要旅游目的地和客源市场的分布情况,并介绍了世界旅游组织对国际旅游业发展的预测。

研究旅游的发展历史是非常值得做的一件事情,也是十分有意义的,这不单纯是学术问题,更可以从中吸取经验、教训,使人们少走弯路。

远古时代,人类为了躲避战争和自然灾害而到处迁徙的行为算不上旅游活动。到了原始社会末期、奴隶社会初期,人类开始了有意识的旅行活动,罗马帝国修建了宽阔的驰道,温泉旅游开始兴起,埃及和希腊的宗教旅行活动繁荣。封建社会时期的欧洲,出现了大量城市,中产阶级和商人的势力日渐强大,促进了旅行活动的进一步发展。18世纪末,随着英国温泉旅游的衰败,海滨度假地开始兴起。古代旅行活动的特点主要表现在:旅行的目的以经商获利为主,其次是宗教朝圣;旅行活动的参加者人数有限,主要是统治阶级、有钱人和部分文人;开始出现了为旅行活动提供服务的有关行业。

标志着近代旅游业开端的重大事件是英国人托马斯·库克于1841年组织的一次禁酒大会。此后,他开办了世界上最早的旅游企业,组织了第一次“全包价”旅游活动和环球旅游活动,成立了世界上第一家旅行社,创造了代金券(旅行支票),为世界旅游业的发展做出了重大贡献。近代旅游活动已经具备了现代旅游活动的基本特点,旅游活动参加人员不断增多,旅游业发展成为一个独立的经济部门。

二战后现代旅游业开始加速发展,主要受到如下因素的推动:国际形势相对稳定,世界经济迅猛发展,科学技术不断取得重大进步,人口和社会发生了较大变化,现代交通运输业高度发达,城市化进程加速发展,信息技术和教育的进步促使人们产生了解世界的愿望,现代旅游业的发展使旅游活动更加安全舒适。现代旅游业的主要特征表现在其大众性、持续性、地理集中性、季节性、现代化、规范化和个性化。

自 20 世纪 60 年代以来,现代旅游业已经发展为世界上增长最强劲的产业,被誉为“经济巨人”,在世界经济中扮演着越来越重要的角色。1950 年~1999 年间,国际旅游人数稳步增长,年均增长率保持在 6.9%;同期,国际旅游收入持续增长,年均增长率达到 11.8%,使旅游业成为世界上增长最快的产业。欧洲是世界上最大的旅游接待地,所占市场份额在 50%以上。东亚及太平洋地区旅游业的增长速度最快。

进入 21 世纪以来,世界旅游业历经波折,但仍然能够克服重重困难,在艰难中前进,2000 年~2005 年间年均增长率保持在 3.3%。由于世界各地相继举办了一系列迎接千禧年的庆祝活动,2000 年国际旅游人数创下了新高,达到 6.87 亿人次,被认为是世界国际旅游发展周期的一个重要里程碑。2001 年,恐怖组织发动了针对美国的恐怖袭击事件,但并没有使国际旅游人数出现显著的下降,仅减少了 0.6%,国际旅游收入下降了 2.8%,这是二战后第一次出现旅游人数和旅游收入下降的情况。2002 年,世界各国的旅游业出现全面恢复,国际旅游人数首次超过 7 亿。2003 年,伊拉克战争、SARS 疫情的爆发和疲软的世界经济使世界旅游业再次面临严峻的考验,国际旅游人数下降了 1%。2004 年的国际旅游人数和旅游人数分别比 2003 年增长了 10.1%和 9.8%。2004 年底到 2005 年全年,天灾人祸接二连三发生,如海啸、地震、洪水、飓风和恐怖袭击事件,但这并没有阻止人们外出旅行的步伐,国际旅游人数突破 8 亿大关。2006 年国际旅游人数持续增长,比 2005 年增加了四千多万人,新兴目的地继续表现良好。就客源市场而言,绝大多数旅游者来自本区域内部,他们更青睐于前往安全性较大的区域性目的地或本国目的地旅游。信息技术和互联网在旅游业中发挥着越来越重要的作用,比如获取信息、交通住宿预订。来自欧洲的国际旅游人数超过全世界国际旅游总人数的一半以上,但随着其他国家经济的崛起,俄罗斯、中国和波兰等国家也正在成为重要的国际旅游客源国。

根据世界旅游组织公布的统计资料,世界上主要的旅游目的地国集中在欧洲、北美和亚太地区,主要包括美国、法国、意大利、西班牙

牙、英国、德国、中国、奥地利、加拿大、墨西哥、瑞士、澳大利亚、荷兰、俄罗斯和希腊。主要的客源市场也集中在这几个地区，世界主要国际旅游客源国包括美国、德国、英国、日本、法国、意大利、荷兰、加拿大、奥地利、中国、比利时、俄罗斯、瑞典、瑞士、韩国和巴西。

世界旅游组织发表的《2020 年旅游展望》指出，到 2020 年，国际旅游人数将达到近 16 亿，其中 12 亿人次为区域内旅游者，3.78 亿人次为远程旅游者；主要旅游接待地为欧洲、东亚太平洋地区、美洲，其次是非洲、中东和南亚；东亚太平洋地区、南亚、中东和非洲将保持较高的增长速度，超过世界平均增长速度，其中，东亚太平洋地区将成为增长速度最快的地区，年均增长率达到 7%；中国将成为世界第一大旅游目的地、第四大国际旅游客源地。

A study of the history of tourism is a worthwhile occupation for any student of the tourism business, not only as a matter of academic interest, but because there are lessons to be learned which are as applicable today as in the past.

(J. Christopher Holloway, 2004: 17)

World Tourism's Yesterday: A Brief Historical Review

1. Origin and Development of Early Travel Activities before 1840

During the primitive period when the productivity was quite low and there were not enough material conditions for travel, human beings were frequently forced to move here and there in order to escape warfare and natural disasters. However, these activities cannot be categorized into travel.

At the end of the primitive period, when the productivity level was improved and bartering activities increased, human beings began to travel consciously. In the slave society, human's travel activities developed rapidly. For example, during the time when the Roman Empire became powerful and prosperous, a lot of wide roads were constructed in the country and spas were already well established and popular for the supposed medical benefits of the waters. The Egyptians held many religious festivals attracting both the devout pilgrims and many who were interested in the famous buildings and works of arts in the cities. From about the same time, the Greek tourists, too, enjoyed their religious festivals, which in time became increasingly oriented to the pursuit of pleasure and sport.

In the feudal period, large numbers of cities sprung up in Europe, where the middle class and businessmen gradually grew rich and powerful, and this facilitated the further development of travel. The end of the eighteenth century saw the rise of the seaside resorts after the heyday of the English spas was already over.

There are several features concerning the travel activities in ancient times. First, the travel activities were motivated dominantly by purpose of business for gaining material benefits, and secondarily by purpose of religious pilgrim. For example, according to Islam, all the Muslims whose economic conditions are permitted must make a long trip to Mecca for pilgrimage in their lifetime. The leisure travel was the privilege of royal family members, influential officials and some men of letters. Second, there were only a small number of travelers, most of whom were ruling class, a few rich people and some scholars and men of letters. Third, in the feudal society service industry began to provide services for travel activities, such as transportation, inns and restaurants.

2. Travel Activities and the Beginning of Tourism Industry before 1950

In 1841, Thomas Cook, as secretary of the South Midland Temperance Association, organized an excursion for 570 members from Leicester to Loughborough at a fare of one shilling return to take part in a temperance meeting. This event, which is characterized by unprecedented scale of participants from all walks of life and similar operation mode of modern travel agency, is generally believed to be the beginning of modern travel activities and tourism industry. In 1845, Thomas Cook operated the first commercial tourism business in the world. By 1855, Cook had extended his field of operations to mainland Europe, organizing the first "inclusive tours" to the Paris Exhibition of that year. In 1865 he set up

Thomas Cook Company, the first travel agency in the world. In 1872, he organized the first round-the-world tour, taking twelve clients for 220 days. In 1873, he introduced the "circular note," the precursor to today's traveler's check, which helped to overcome the problems caused by the many different coinages in Europe. Besides, a lot of hotels were built along railways and highways and around wharfs. Governments and private sectors began to invest in the development of tourism resources and tourism projects. In fact, as early as in 1839, Karl Baedeker introduced the first guidebook in the world giving information on Netherlands and Belgium.

Worldwide, travel in the early nineteenth century began to be characterized by the features of today's travel activities. First, more and more people traveled for recreational or holiday purposes. Second, the tourism industry began to develop as a separate economic sector.

World Tourism's Today: Important Trends

The substantial growth of tourism clearly marks tourism as one of the most remarkable economic and social phenomena of the past century. The number of international arrivals shows an evolution from a mere 25 million international arrivals in 1950 to an estimated 806 million in 2005, corresponding to an average annual growth rate of 6.5 percent.

1. Reasons of the Rapid Development of Modern Tourism

Since World War II, modern tourism has been developing rapidly, driven by the following factors. First, the international situation remains relatively stable politically after World War II, the world economy has developed rapidly and great progresses have been made in science and technology. Second, considerable changes have taken place in terms of

population and society, such as dramatic increase of world population, the arrival of ageing society, more employed women in the developed countries, late marriage and more DINK families. Third, the highly developed modern transport industry has promoted the development of modern travel industry, which has always been heavily dependent on it. Traditional transportation modes such as railroads and passenger ships have been replaced by automobiles and airplanes. Expressways have extended and grown dramatically. Fourth, accelerated urbanization process has changed people's living environment greatly, such as air pollution and noise pollution, boring and duplicative work, crowded living space and noisy urban environment. Fifth, progress of information technology and education, which provides more channels for people to know the world, aroused people's interest in travel. Sixth, the development of modern tourism industry makes travel safer and more comfortable.

2. Features of Modern Tourism

Modern tourism is characterized by popularity, sustainability, geographical concentration, seasonality, modernization, standardization and humanity. In the twentieth century, travel continued to expand its participants to cover the ordinary working class, resulting in mass tourism in the form of package tour or incentive travel. International tourist arrivals have maintained a rapid growth and travel has become a regular human activity. Worldwide, about 80 percent of international tourists travel to Europe and America. The local climate of the destinations has an important impact on the seasonality of travel activities while paid vacation in most developed countries—the major tourist markets—takes place in July, August and September, the peak season of international tourism. Tourism suppliers such as travel agencies, tourist hotels and transport companies have been modernized in terms of equipment, technology and

service. In order to compete in the tourism industry, travel markets all over the world have been increasingly standardized to provide quality products and service. Nowadays, people demand more diversified and higher quality tourism products and pay more attention to the participation of tourist activities. It is necessary for tourism operators to provide personalized products and services to their clients. With the continuing increase of income and changes of lifestyle, people have more demand for recreation, travel and holiday. Tourist consumption is increasingly becoming a fashionable act and new forms of tour constantly emerge, such as golf tour, white-water rafting, study tour, cruise ships, adventure tour and ecotourism.

3. Important Trends of Modern Tourism

Tourism Trends from 1950 to 1999

Since the end of World War II, tourism has been developing rapidly all over the world. Particularly from the 1960s, tourism has emerged as the strongest growing industry, reputed as “economic giant” in the 20th century, and played a more and more important role in world economy.

International tourism has grown steadily during the last half century from 25.28 million arrivals in 1950 to 662.9 million in 1999 (see Table 1.1), at an average annual growth rate of 6.9%.

The annual increase rate in international tourism from 1950 to 1960 exceeded 10 percent. Between 1970 and 1999 the annual growth averaged 4.9 percent, remaining above 4 percent even in the early 1990s when there was a global recession. In the span of 50 years, the growth rate declined from above 10 percent in the 1950s and stabilized at around 4–5 percent towards the end of the 20th century.