

Monitoring Report on the Sustainable Tourism Development of Yangshuo

Guilin Municipal Tourism Bureau

Monitoring Center for UNWTO Sustainable Tourism Observatories

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Contents

Chapter I Foreword	15
1.1 Origin	15
1.2 Monitoring Process	16
Chapter II Tourism and Community	23
2.1 General	23
2.2 Community Monitoring Indicators	24
2.3 Indicator Analysis	26
2.3.1 Most Residents Benefit from and Support Tourism Development.....	27
2.3.2 Residents Have Both Positive and Negative Evaluations on Economic Impacts of Tourism	28
2.3.3 Perceptual Evaluation of Residents on Social and Cultural Impacts of Tourism	29
2.3.4 Perceptual Evaluation of Residents on Environmental Impacts of Tourism	32
2.3.5 Community Engagement	34
2.4 Typical Community Case Analysis	37
2.4.1 Licun Village	37
2.4.2 Adjacent Communities of Xingping Pier.....	39
2.5 Summary	41
Chapter III Tourist Satisfaction	43
3.1 Tourist Evaluation on Yangshuo Tourism Resources	43
3.1.1 Tourist Satisfaction Monitoring Indicators	43

3.2.1 Travel Methods of Tourists: DIY Tour Plays a Dominate Role	44
3.2.2 Tourism Motivations: Sightseeing and Holiday, Difference between Domestic and Foreign Tourists.....	45
3.2.3 Length of Stay: Most of Tourists Stay There for a Short Time. The Length of Stay of the Foreign Tourists is Long than that of the Domestic Tourists.	46
3.2.4 Accommodation Facilities: Guesthouses and Youth Hostels are Preference.	47
3.2.5 Total Tourism Spending: The Total Spending is Low and Less Than Last Year.....	48
3.2.6 Means of Transporation: Diverse Options	49
3.3 Tourist Satisfaction	51
3.3.1 The Evaluation on Tourism Resources is High	51
3.3.2 Evaluation on Tourism Services of Yangshuo.....	53
3.3.3 Evaluation on Tourism Environment of Yangshuo	59
3.3.4 The Overall Evaluation on Yangshuo is High and Basically Meets or Exceeds the Expectations.....	61
3.3.5 The Willingness to Recommend is Higher than the Willingness to Revisit	62
3.4 Tourist Complains are Handled Timely and Efficiently and Less Complaints are Found.	64
3.5 Summary of the Chapter	65
3.5.1 The Proportion of DIY Tourists is High and the Per Capita Consumption Needs Further Improvement.....	65

3.5.2 The Satisfaction with Local Resources is High While the Satisfaction with Resource Conservation is Low	65
3.5.3 The Satisfaction with Ticket Prices and Shopping is Low and both Services and Products Need Improvement	66
3.5.4 The Tourist Experience is Good and a Large Difference in Experience between Domestic and Foreign Tourists Exist	66
Chapter IV Health and Safety	67
4.1 Monitoring Indicators of Health and Safety	67
4.2 Health	67
4.2.1 Food Hygiene	67
4.2.2 Environmental Hygiene	68
4.3 Safety	68
4.3.1 Medical Safety and Disease Control	68
4.3.2 Public Safety	68
4.4 Tourist Perception	69
4.4.1 Tourists are Satisfied with the Hygienic Condition of Yangshuo	69
4.4.2 The Satisfaction with Yangshuo's Public Order is High	69
4.4.3 The Attention Paid to Public Order and Hygiene is Low	70
4.5 Summary of the Chapter	71
Chapter V Tourism Planning and Control	72
5.1 Monitoring Indicators of Tourism Planning and Control	72
5.2 Tourism Transportation Planning and Control	73
5.2.1 Significance of the Indicators for Transportation Planning and Control	73

5.2.2 The Traffic Sign Recognition System Needs to be Strengthened Based on the Roadway Standard.	73
5.2.3 Passenger Station Basically Meets the Needs of Tourists.	74
5.2.4 The Road and Traffic Construction shall Rely on the Means of Transportation Chosen by Tourists.	75
5.2.5 Constant Improvement of Tourism Transportation System.....	76
5.3 Tourism Resources Planning and Control	77
5.3.1 Natural Tourism Resources are Still the Core	77
5.3.2 Tourist Diversion Starts to Achieve Initial Effect	78
5.3.3 Stringent Control over the County's Architectural Landscape	79
5.4 Proper Increase of the Proportion of Tourism Land	81
5.5 Summary of the Chapter	83
5.5.3 It is a Need to Develop Rational Plans according to the Tourism Development of Yangshuo	83
Chapter VI Economic Benefits of Tourism	85
6.1 Monitoring Indicators of Economic Benefits of Tourism.....	85
6.2 The Development Conditions of the Tourism Industry Continue to Improve	86
6.3 Contribution of Tourism to Yangshuo's GDP and Public Finance	87
6.3.1 The Contribution of Tourism to GDP Increases Year by Year	87
6.3.2 The Contribution of Tourism to Finance Continues to Increase.....	89
6.4 The Impact of Tourism Seasonality of Yangshuo is Weakened.....	91
6.5 Tourism Attracts More Investments	92
6.6 Impacts of Tourism on Resident Employment	93
6.6.1 Increase Employment Opportunities for Yangshuo Local Residents ...	94

6.6.2 Promote the Development of Education and Training Industry and Improve Resident Employment	94
6.7 Impacts of Tourism on Industry Structure	95
6.7.1 Tourism Promotes Local Sales of Agricultural Products	95
6.7.2 Diversification of Handicraft Business Types	96
6.8 Impacts of Tourism on Yangshuo's Commercial Development	97
6.8.1 Overall Impact Analysis: The proportion of Tourism Shops is Increased and the Competition among Small Enterprises is Intensified.....	97
6.8.2 Change of Commercial Form under Tourism Impact.....	100
6.8.3 Analysis on the Social Behaviors and Psychosocial Performances of Small Tourist Business Owners	103
6.8.4 Analysis on the Social Behaviors and Psychosocial Performances of Small Tourist Business Employees.....	105
6.9 Summary of the Chapter	110
6.9.1 Tourism has Vigorously Promoted the Overall Economic Development of Yangshuo	110
6.9.2 Tourism Plays an Obvious Role in Driving Investment	111
6.9.3 Tourism Plays a Prominent Role in the Industrial Restructuring of Yangshuo	111
6.9.4 Tourism Plays a Prominent Role in Promoting the Commercial Development of Yangshuo	111
Chapter VII Tourism and Resources Environmental Protection	112
7.1 Monitoring Indicators of Tourism and Resources Environmental Protection	112
7.2 Atmospheric Environment.....	113

7.2.1 The Air Quality is Obviously Improved	113
7.2.2 Perception: the Resident Perception is Poor while the Tourist Perception is Good.....	114
7.3 Water Resource Environment	115
7.3.1 Water Resource Utilization and Protection Improvement	115
7.3.2 Perception: the Residents Perceive that the Water Quality Gets Worse while the Tourists Think that it is Good	116
7.4 Noisy Environment	118
7.4.1 State Quo of the Noise Environment	118
7.4.2 Perception: Heavy Noise Pollution.....	118
7.5 Solid Waste	119
7.5.1 The Rate of Solid Waste Disposal Increases	119
7.5.2 Perception: the Residents Perceive that the Solid Wastes Increase while the Tourists Think that the Scenic Environment is Clean.....	120
7.6 Landscape Maintenance and Visual Impact	121
7.6.1 Constant Issue of Measures for Landscape Improvement	121
7.6.2 Perception: the Resident Awareness On Landscape Maintenance Is Poor And the Tourist Perception is Good	122
7.7 Energy-saving Management	123
7.8 Summary of the Chapter	124
Chapter VIII Tourism Products and Services	126
8.1 Monitoring Indicators of Tourism Products and Services	126
8.2 Indicator Analysis	127
8.2.1 Tourists' Purchase Characteristics	127

8.2.2 Tourism Products	132
8.2.3 Tourism Service Scope	139
8.2.4 Tourist Response to Tourism Products	143
8.3 Summary of the Chapter	145
8.3.1 Concentrated Tourism Motivation with Desiderated Diversification Improvement	146
8.3.2 Welcomed Tourism Products with Local Characteristics.....	146
8.3.3 Attractiveness Maintained by Landmark Attractions and Visibility Improvement of Other Attractions.....	146
8.3.4 Improved Service Facilities and Reasonable Regional Distribution ..	146
8.3.5 Important Communication of Internet and Public Praise and Focus on Tourism Information Transfer	147
Chapter IX Conclusion	148
9.1 Increased Awareness of Tourism Engagement by Community Residents, but in Limited Mode	148
9.2 Transition of Traveling Mode for Domestic and Foreign Tourists but with Large Differences in Travel Experience	148
9.3 Higher Attraction of Natural Resources and Desiderated Improvement of Tourism Transportation	149
9.4 Tourism Promotion for Local Economic Development and Great Ripple Effect from Tourism Industry	149
9.5 Increased Competition among Small Tourism Enterprises and Independent Change of Tourism Commercial Activities	150
9.6 Rental Impact on Stable Operation of Small Business and Employee-Concerned Wages and Benefits.....	150

9.7 Overall Health and Safety Image and Gradually Formed Environment-Friendly Destination	151
9.8 Upgrade and Transformation of Tourism Products and Further Improvement of Supporting Tourism Facilities	151
Questionnaire of Yangshuo Sustainable Tourism Development (For tourists) ..	153

List of Tables

Table 1-1 Summary of topics and basic indicators of sustainable tourism development monitoring of Yangshuo	17
Table 2-1 Community monitoring indicators.....	24
Table 2-2 Resident participation in tourism decision making	36
Table 3-2 Domestic tourist evaluation on tourism resources	51
Table 3-3 Foreign tourist evaluation on tourism resources.....	52
Table 3-4 Domestic tourist evaluation on scenic spot service	54
Table 3-5 Foreign tourist evaluation on scenic spot service	54
Table 3-6 Domestic tourist evaluation on food and beverage service	55
Table 3-7 Foreign tourist evaluation on food and beverage service	55
Table 3-8 Domestic tourist evaluation on accommodation service	56
Table 3-9 Foreign tourist evaluation on accommodation service	56
Table 3-10 Domestic tourist evaluation on transportation service.....	57
Table 3-11 Foreign tourist evaluation on transportation service.....	57
Table 3-12 Domestic tourist evaluation on shopping and entertainment.....	58
Table 3-13 Foreign tourist evaluation on shopping and entertainment.....	59
Table 3-14 Domestic tourist evaluation on human environment	60
Table 3-15 Foreign tourist evaluation on human environment	60
Table 3-16 Domestic tourist evaluation on natural environment.....	61
Table 3-17 Foreign tourist evaluation on natural environment.....	61
Table 3-18 Comparison of overall evaluation between domestic and foreign tourists.....	62
Table 3-19 Record of complaint calls provided by Yangshuo County Tourism Quality Supervision and Management Office in the first half of 2013.....	64
Table 4-1 Monitoring indicators of health and safety	67
Table 4-2 Tourist evaluation on food hygiene, accommodation safety and hygiene and good public order	70
Table 4-3 Attention of tourists to public order and hygiene	71

Table 5-1 Monitoring indicators of tourism planning and control.....	72
Table 5-2 Land use in tourism towns and villages in Yangshuo County (2006 - 2020)	82
Table 6-1 Monitoring indicators of economic benefits of tourism	85
Table 6-2 Statistics on Yangshuo Tourists (2010-June 2013)	87
Table 6-3 GDP and tourism receipts growth of Yangshuo from 2001 to the first half of 2013	88
Table 6-4 Tax payment of the scenic spots of Yangshuo	89
Table 6-5 Types of shops in Yangshuo County in 2013.....	98
Table 6-6 Average satisfactions of employees with each indicator	106
Table 7-1 Monitoring indicators of tourism and resources environmental protection	112
Table 8-1 Monitoring indicators of tourism products and services	126
Table 8-2 Comparison table of traveling purpose for domestic and foreign tourists	128
Table 8-3 Types of the shops favorable for domestic and foreign tourists	132
Table 8-4 Tourists' product preference in the attractions.....	137
Table 8-5 Quantity and proportion of various shops	141

List of Figures

Figure 2-2 Positive evaluation of residents on economic impacts of tourism	28
Figure 2-3 Negative evaluation of residents on economic impacts of tourism.....	29
Figure 2-4 Positive evaluation of residents on social and cultural impacts of tourism....	30
Figure 2-5 Negative evaluation of residents on social and cultural impacts of tourism ..	31
Figure 2-6 Negative evaluation of residents on environmental impacts of tourism	33
Figure 2-7 Positive evaluation of residents on environmental impacts of tourism.....	34
Figure 2-8 Number of questionnaires from each place.....	35
Figure 2-9 Resident engagement in tourism	35
Figure 3-1 Comparison of travel methods between domestic and foreign tourists.....	45
Figure 3-3 Comparison of the length of stay between domestic and foreign tourists.....	47
Figure 3-4 Comparison of accommodation facilities between domestic and foreign tourists	48
Figure 3-5 Comparison of total tourism spending between domestic and foreign tourists	49
Figure 3-7 Comparison of means of transport between domestic and foreign tourists in Yangshuo	50
Figure 3-8 Expectation of domestic and foreign tourists.....	62
Figure 3-9 Willingness of domestic and foreign tourists to revisit	63
Figure 3-10 Willingness of domestic and foreign tourists to recommend	63
Figure 5-1 Tourist perception to the visibility of traffic sign recognition system.....	74
Figure 5-2 Tourist perception to convenient transportation.....	75
Figure 5-3 Choices of means of transport of tourists to Yangshuo	76
Choices of means of transport of tourists in Yangshuo.....	76
Figure 5-5 Core attraction to tourists	78
Figure 6-1 Proportion of tourism in GDP in Yangshuo County.....	89
Figure 6-2 Degree of optimism of owners to the tourism investment in Yangshuo.....	93
Figure 6-3 Tourism development has brought more job opportunities	94

Figure 6-4 Distribution of streets selling souvenirs	97
Figure 6-5 Comparison between the types of shops in 2011 and 2013 in Yangshuo County	99
Figure 6-6 Comparison between shops of different use functions in 2011 and 2013	100
Figure 6-7 Comparison between the proportions of tourism shops in 2011 and 2013 ..	101
Figure 6-8 Comparison between the proportions of types of shops in all areas in 2011 and 2013.....	102
Figure 6-10 Owner's selection of energy-saving behavior	105
Figure 7-2 Air quality environment of all counties in Guilin City in 2011	114
Figure 7-3 Tourism has aggregated air pollution	114
Figure 7-4 Air cleanliness of Yangshuo	115
Figure 7-5 Tourism has aggregated water pollution	116
Figure 7-6 Good water quality of Lijiang River	117
Figure 7-7 Good water quality of Yulong River	117
Figure 7-8 Tourist perception to worse noise pollution caused by tourism	118
Figure 7-9 Small noise in Yangshuo	119
Figure 7-10 Tourism has increased solid wastes.....	120
Figure 7-11 The scenic environment is clean	121
Figure 7-12 Hotels and other tourism facilities have ruined landscape aesthetics	122
Figure 7-13 The cultural attractions are properly maintained.....	123
Figure 7-14 Proportion of enterprises taking energy-saving measures.....	124
Figure 8-1 Comparison of traveling purpose for domestic and foreign tourists	130
Figure 8-2 Tourists' stay in Yangshuo.....	131
Figure 8-5 Why domestic and foreign tourists buy tourist commodities.....	136
Figure 8-6 Choice of the attractions by domestic and foreign tourists	138
Figure 8-7 Zoning distribution of service facilities in Yangshuo County	140
Figure 8-8 Quantity comparison of tourism-related shops in the areas	143
Figure 8-9 Channels accessible to tourism information by domestic and foreign tourists	144

Figure 8-10 Information desired by the tourists	145
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Chapter I Foreword

1.1 Origin

Since 2002, with the vigorous development of local tourism, Guilin has gradually been listed as the world's famous tourist destination and the Guilin Municipal Government has strengthened contacts and cooperation with UNWTO. The 2002 Boao Asian Tourism Forum and the UNWTO Regional Seminar on Tourism Partnerships in Destination Development and Management first organized by UNWTO in 2003 were held in Guilin and drew extensive domestic and international concerns. In 2004, Guilin and UNWTO entered into a mutual cooperation agreement, in which Yangshuo was defined as one of UNWTO's global tourism observatories, and UNWTO included tourism data of Yangshuo in its book *UNWTO Sustainable Development Indicators* (World Tourism Organization (2012), *Indicators of Sustainable Development Tourism Destination – A Guidebook*, UNWTO, Madrid). On July 26, 2005, UNWTO officially set up a sustainable tourism observatory in Yangshuo, which was technically monitored by Sun Yat-sen University. This is the first tourism observatory set up by UNWTO in China as well as in the world.

Since August 2006 when the Center for Tourism Development and Planning Research of Sun Yat-sen University (SYSU for short) signed the *Agreement for the Monitoring of Indicators of Tourism Sustainable Development of Yangshuo* with Guilin Municipal Tourism Bureau, the Center has completed the 2006-2008 monitoring report in Chinese and English of Yangshuo using the indicators and methods of UNWTO's GOST program. In October 2009, the Yangshuo Observatory was completed and put into operation, indicating the start of Yangshuo's long-term sustainable tourism development monitoring. On September 28, 2010, UNWTO and SYSU entered into a cooperative agreement, and founded the Monitoring Center for UNWTO Sustainable Tourism Observatories (UNWTO MCSTO, hereinafter "MCSTO") to take charge of the management and monitoring of sustainable tourism observatories in China and even those in the Asian-Pacific region in the future, and other technical work, so as to ensure continuous, comprehensive and effective monitoring. This marks the official completion of the physical

establishment of the Center, as well as the substantive cooperation between SYSU and UNWTO on the promotion of sustainable development of global tourism.

The monitoring of sustainable development of Yangshuo tourism (July 2013) is the extension and deepening of the monitoring previous years. On the basis of the *Indicators of Sustainable Development for Tourism Destinations*, this report points out the problems in the current and sustainable development of Yangshuo Tourism, proposes some countermeasures to help the sustainable development of local tourism, and provides reference for the application of relevant indicators for UNWTO and other institutes engaged in tourism sustainable development.

1.2 Monitoring Process

In July 2013, the Monitoring Centre for UNWTO Sustainable Tourism Observatories (hereinafter “MCSTO”), with the vigorous support from Guilin Municipal Tourism Bureau and the active cooperation with the People’s Government of Yangshuo County, completed the monitoring of the sustainable tourism development of Yangshuo of 2013. The Monitoring Group consisting of 16 people includes: a teacher from the Center for Tourism Development and Planning Research of Sun Yat-sen University, a doctoral student, a graduate student and thirteen undergraduates.

From July 6 to July 12, the Monitoring Group visited West Street, Ten miles Gallery (Butterfly Fountain, Ancient Totem Path, Big Banyan, Julong Lake, Gold Water Cave and Moon Hill), Yulong River, Early Paradise and other key scenic spots, investigated Licun, Old County Village, natural villages along Yulong River, Xingping and other tourism communities as well as Yangshuo urban area, carried out a questionnaire survey with Chinese and foreign tourists, community residents, small tourist business owners and employees and conducted random interviews for auxiliary analysis to collect the primary data. It also added extra investigations and surveys according to the feedbacks on the monitoring work of 2012, including randomly investigating the places of the main scenic spots where the visiting vehicles parked, monitoring the tourists flow rate of West Street as well as the noise pollution and statistically analyzing the shops in the main streets of Yangshuo County. The Monitoring Group acquired a lot of primary data through questionnaire survey and interviews. In addition, the members also visited Yangshuo Tourism Bureau, Local Tax Bureau, Industrial and Commercial Administration, Public Security

Bureau, Land Resources Bureau, Environmental Protection Bureau, Meteorological Bureau, Health Bureau, Culture and Sports Bureau and other government authorities to collect relevant secondary sources.

The monitoring group distributed 1830 questionnaires, of which: 793 out of 800 (in Chinese) to domestic tourists are valid, accounting for 99.12%; 242 out of 250 (in English) to foreign tourists are valid, accounting for 96.80%; 493 out of 520 to community residents are valid, accounting for 94.80%; 168 out of 180 to employees are valid, accounting for 93.33%; and 76 out of 80 to employers are valid, accounting for 95%.

In mid-to-late July, the Monitoring Group prepared the report according to the contents and indicators in the *Indicators of Sustainable Development for Tourism Destinations*, the existing research, fieldwork data, interview materials, questionnaire statistical analysis and secondary data. This monitoring report consists of nine parts – foreword, tourism and community, tourist satisfaction, health and safety, tourism planning and control, economic benefits of tourism, tourism, and resources and environmental protection as well as Tourism products and services.

Covering the topics and basic indicators on the monitoring of sustainable development of Yangshuo tourism, this monitoring report was prepared by reference to the screening of key issues and indicators of 2012, WTO key performance indicators, previous Yangshuo monitoring indicators and the actual situation of Yangshuo tourism development of 2012. In the report, the change of the commercial form of Yangshuo under the tourism impact, the social behaviors and psychosocial performances of small tourist business owners and employees, and other analyses were added.

Table 1-1 Summary of topics and basic indicators of sustainable tourism development monitoring of Yangshuo

Part	Topic	Basic indicator
Tourism and community	Overall perception of residents to tourism	Tourism and local
		Tourism and itself
	Impacts of tourism on local communities	Employment
		Income
		Life and consumption level

	Social and cultural impacts of tourism on local communities	Public security
		Community life
		Subject-object relation
		Traditional culture and handicraft
	Impacts of tourism on local environment	Environment pollution
		Environmental awareness
		Harmony between scenic spots and communities
	Community engagement and awareness	Advice and suggestions
		Sustainable development awareness
Tourist satisfaction	Tourist evaluation on tourism resources	Resource characteristic
		Resource protection
	Tourist evaluation on tourism services	Scenic spot service
		Food and beverage service
		Accommodation service
		Transportation service
		Shopping service
	Tourist evaluation on overall environment	Natural environment
		Human environment
Health and safety	Health	Food hygiene
		Environmental hygiene
	Safety	Medical safety and disease control
		Public safety
		Tourists' attention
	Local security problems	Security problem
		Tourist perception

Tourism planning and control	Transportation planning and control	Roadway standard
		Passenger station standard
		Means of transport (preference)
		Tourism service facilities and county land for transportation plan
	Tourism resources planning and control	Development of core attraction elements
		Tourists flow rate control in the sightseeing spots
		Architectural landscape style and features control
		Land use control at the overall strategic level
	Land use for tourism	Layout planning of tourism development space, and land use control
		Land use of main destination townships
		Land conversion and additional tourism land
Economic benefits of tourism	Tourism receipts	Tourism statistics (gross tourism receipts, number of tourists, number of beds, average length of stay, number of tourists staying overnight, etc.)
	Contribution of tourism to Yangshuo's GDP and public finance	Percentage of tourism receipts to GDP
		Contribution of tourism receipts

		to tax revenue
	Impacts of tourism on industry structure	Overall development trend of the tertiary industry driven by tourism (percentage of corporate ownership and foreign owners)
		Impacts of tourism development on Yangshuo's agricultural structure
	Impacts of tourism on Yangshuo's handicraft and commercial development	Development trend of accommodation and catering services driven by tourism
		Development trend of handicrafts and characteristic agriculture driven by tourism
	Impacts of tourism on Yangshuo's social employment	Job opportunities created by tourism
		Competition of tourism enterprises
		Resident training and skills improvement driven tourism (number of English training agencies in the county and the employee's English skill required by the enterprises)
		Impacts of tourism on employee's compensation and satisfaction
	Impacts of tourism on Yangshuo investment	Data of County Investment Promotion Bureau and

		perception of employers to investment
	Tourism seasonality	Tourism statistics (Occupancy rate, number of tourists per month)
		Low and peak seasons
		Impact of tourism seasonality on employment
Tourism and resources environmental protection	Atmospheric environment	Air quality and conformance to standard
		Perceptual evaluation of residents and tourists
	Utilization of water resource and conservation of aquatic environment	Utilization of water resource
		Perceptual evaluation of residents and tourists
	Noisy environment	Noise control
		Perceptual evaluation of residents and tourists
	Solid waste	Solid waste disposal
		Perceptual evaluation of residents and tourists
	Landscape and visual impacts of tourism	Whether there is landscape and visual improvement and control in support of tourism development
		Perceptual evaluation of residents and tourists
	Energy management	Percentage of enterprises taking energy conservation measures

		and types of such measures
Tourism products and services	Tourists' expectation of tourism products	Purpose of tourist to Yangshuo
		Length of stay of tourists at Yangshuo
	Tourists' options for tourism products	Shops attractive to tourists
		Tourism products consumption
		Touring routes available to tourists
	Scope of tourism services	Types of basic tourism service facilities at destinations
		Distribution of tourism service facilities
	Image of destination/tourists' response to tourism products	Channels through which tourists acquire information concerning the destination
		Destination information desired by tourists
		Willingness of tourists to revisit
		Will tourists recommend Yangshuo to others

Chapter II Tourism and Community

2.1 General

In this round of monitoring, a total of 493 questionnaires were distributed to residents from July 6, 2013 to July 11, 2013 in Putao Road, Kangzhan Road, Shima Road, Guihua Road, West Street, surrounding area of gas station, Yangshuo Park and Ten miles Gallery, Old County Village and Xingping Ancient Town.

The five-point Likert scale was applied to the questionnaires. Points 1 to 5 represent how much the residents agree or disagree. 1 means Strongly Disagree; 2 mean Disagree; 3 mean Neutral; 4 mean Agree; and 5 mean Strongly Agree. In the distribution of questionnaires, most of residents completed the questionnaires independently. For those who have difficulty in filling out the questionnaires, the investigators would help them to complete them by means of interview. The resident questionnaire is composed of five parts: (i) the overall perception of residents to Yangshuo tourism development; (ii) perception and attitude of residents to economic impacts brought by tourism; (iii) perception of residents to social and cultural impacts of tourism on local communities; (iv) perception of residents to environmental aspects of tourism; and (v) collection of the respondents' personal information. The first four parts are the indicators used to measure the awareness and impact of residents on Yangshuo's sustainable tourism development.

Here is the preliminary result from the questionnaires collected: The residents think that tourism brought a less significant impact on economy and damaged the local natural environment, but it exerted a positive impact on social culture. According to them, the environment is easily affected by tourism and it is not easy to generate income through "local tourism", however, the social culture is deep-rooted and not easily changed. Most of residents think that tourism enhances local folk custom, traditional culture and moral situation instead of damaging them, because the holding of more cultural activities and festival activities involves more people in carrying forward the traditional culture. The case analysis on Licun Village and the adjacent communities of Xingping pier consists of three parts: (i) Introducing the development status of Licun Village and the adjacent communities of Xingping pier; (ii) Analyzing the common character between these two places and other places of Yangshuo; and (iii) Stating the typical and

special characteristics of these two places.

2.2 Community Monitoring Indicators

This report is prepared by reference to the UN's *Indicators of Sustainable Development for Tourism Destinations* and adjusted according to the actual situation of Yangshuo tourism development to give the following community monitoring indicators: See table 2-1.

Table 2-1 Community monitoring indicators

Main monitoring aspect	Specific monitoring indicator
Overall perception of residents to tourism impacts	Tourism is good to our local development
	I can benefit from tourism
	Satisfaction with Yangshuo's tourism development
	Continue to support Yangshuo's tourism development
Economic impacts of tourism on local communities	Tourism development has brought more job opportunities.
	Tourism development has increased economic income.
	I'm satisfied with my income.
	Tourism has attracted more investment and consumption.
	Tourism development has led to price hike.
	Tourism development has led to rise of housing price.
	Tourism has greatly improved the living standard.
	Tourism only benefits a few people.
Social and cultural impacts of tourism on local communities	Tourism has increased crime rate.
	Tourism has disturbed our former lives.
	Tourism has restricted my use of tourism resources.

	Tourism has greatly improved infrastructure.
	Tourism has greatly improved medical facilities and services.
	Tourism has increased the quantities of demolished old houses and newly built houses.
	Tourism has promoted cultural exchanges with outside world.
	Tourism has increased the local sense of pride and belonging.
	Folk customs and cultural traditions have been ruined and forgotten.
	Tourism has caused the tension between residents and tourists.
	Tourism has ruined the local moral situation.
	More cultural or festival activities are held.
	Tourism has involved more people in extension of traditional culture.
	Tourism has promoted local handicraft development.
Impacts of tourism on local environment	Tourism has aggregated air pollution.
	Tourism has aggregated water pollution.
	The wastes are disposed on a timely and efficient manner.
	Tourism has aggregated noise pollution.
	Tourism has increased solid wastes.
	The communities and streets are cleaner.
	Tourism has led to congested traffic.
	Guesthouses and other tourism facilities have ruined landscape aesthetics.

	I think it is very important to protect the natural environment.
Community engagement and awareness	I'm willing to provide advice on the development of the scenic zone.
	Some decisions of the scenic zone incorporate our advices.
	I've received information on government policies.
	Percentage of the community residents engaged in tourism and main types
	Perception of the community residents to the concept "sustainable tourism development"
	Concerns of the community residents on tourism development

2.3 Indicator Analysis

In this round of monitoring, a random questionnaire survey was conducted on residents in Yangshuo County, with 493 valid questionnaires collected. The survey samples, which are basically the same with those of last year, are relatively reasonable. Here is the basic information: The male to female ratio is 1:1.06, most of them aged between 25 and 60, accounting for 78.1% of the total; of all respondents, 25.7% are aged between 25 and 44 and 52.4% are aged between 45 and 60. 80.4% of residents have an education background of high school or technical secondary school and below; 13.9% have a monthly income of over 3,000 Yuan, 22.0%, below 1,000 Yuan and 44.6%, between 1,000 and 2,000 Yuan; 74.1% of the respondents have been living Yangshuo for more than 10 years.

The community monitoring indicators reflect the perception of local residents to social and cultural, economic and environmental impacts brought by tourism development. In the indicator analysis, to further reflect the attitude of residents to these impacts, the percentages or values of "strongly agree" and "agree" in the attitude scale are classified as one "agree", while the percentages or values of "strongly disagree" and "disagree" are classified as the other "disagree".

2.3.1 Most Residents Benefit from and Support Tourism Development

The overall attitude of residents to Yangshuo's current tourism development can be reflected in the four questions in the questionnaire: "Tourism is good to our local development", "I can benefit from tourism", "How satisfied are you with Yangshuo's tourism development" and "Will you support Yangshuo's sustainable tourism development". See the following figure for percentages of these four questions:

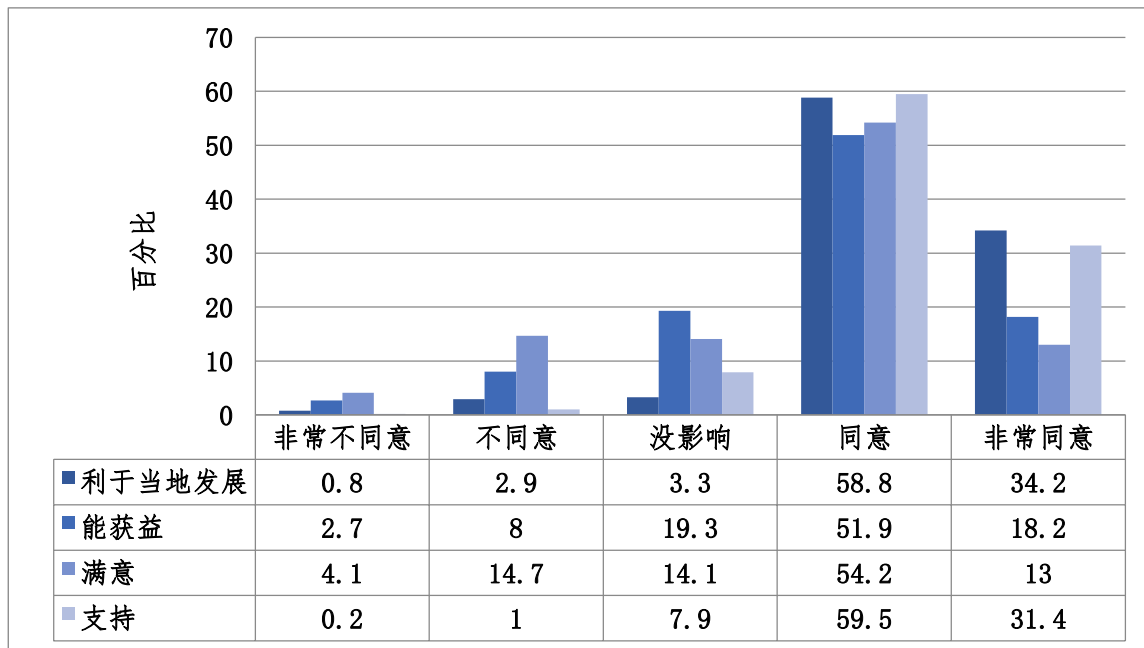


Figure 2-1 Overall perception of Yangshuo residents to tourism development

Figure 2-1 reflects the overall perception of Yangshuo residents to tourism development. It can be seen from the data that 93% of residents think tourism is good to local development; 70% think they benefit from tourism; 67% are satisfied with Yangshuo's tourism development; and 90.9% express their willingness to support Yangshuo's sustainable tourism development. Only a few residents hold a negative view on the first, second and fourth questions, accounting for 3.7%, 10.7% and 1.2% respectively. 18.8% of residents are not satisfied with the tourism development of Yangshuo.

It is showed in figure 2-1 that the portions of "agree" and "strongly agree" are large, which indicates that many residents think tourism is good to local development and they benefit from tourism. The majority of residents are satisfied and support local tourism development and only a few of them hold a negative view on the four questions.

2.3.2 Residents Have Both Positive and Negative Evaluations on Economic Impacts of Tourism

The evaluation indicators of residents concerning the economic impacts of tourism are mainly reflected in these eight questions: “tourism development has brought more job opportunities”, “tourism development has increased economic income”, “I’m satisfied with my income”, “tourism has attracted more investment and consumption”, “tourism development has led to price hike”, “tourism development has led to rise of housing price”, “tourism only benefits a few people”, and “tourism has greatly improved the living standard”. These eight questions are analyzed through positive and negative tourism impacts on economy. See figures 2-2 and 2-3.

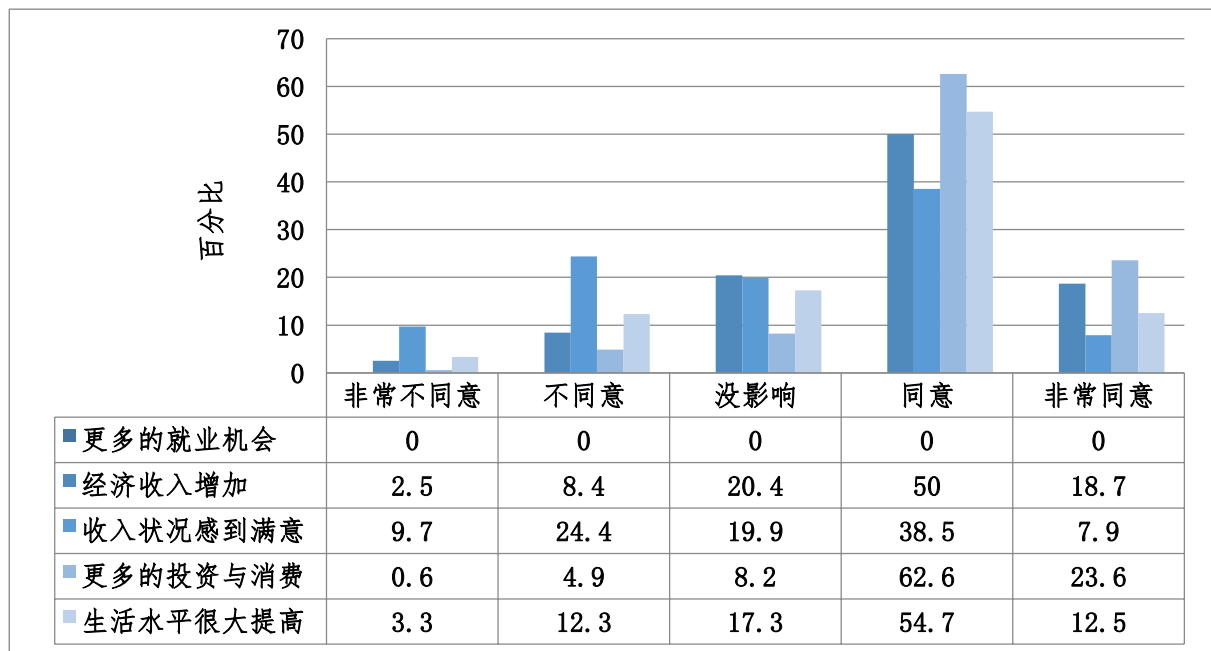


Figure 2-2 Positive evaluation of residents on economic impacts of tourism

It can be seen from figure 2-2 that the residents have a high positive evaluation on economic impacts of tourism. Most of them think that tourism brings a positive impact on job creation, investment attraction and life improvement. 86.2% and 81.7% of residents hold a positive view on “tourism has attracted more investment and consumption” and “tourism development has brought more job opportunities”. 68.7% think tourism development has increased economic income. 67.2% agree that tourism has greatly improved the living standard. Only 46.4% are satisfied with their income and 34.1% are not satisfied with it.

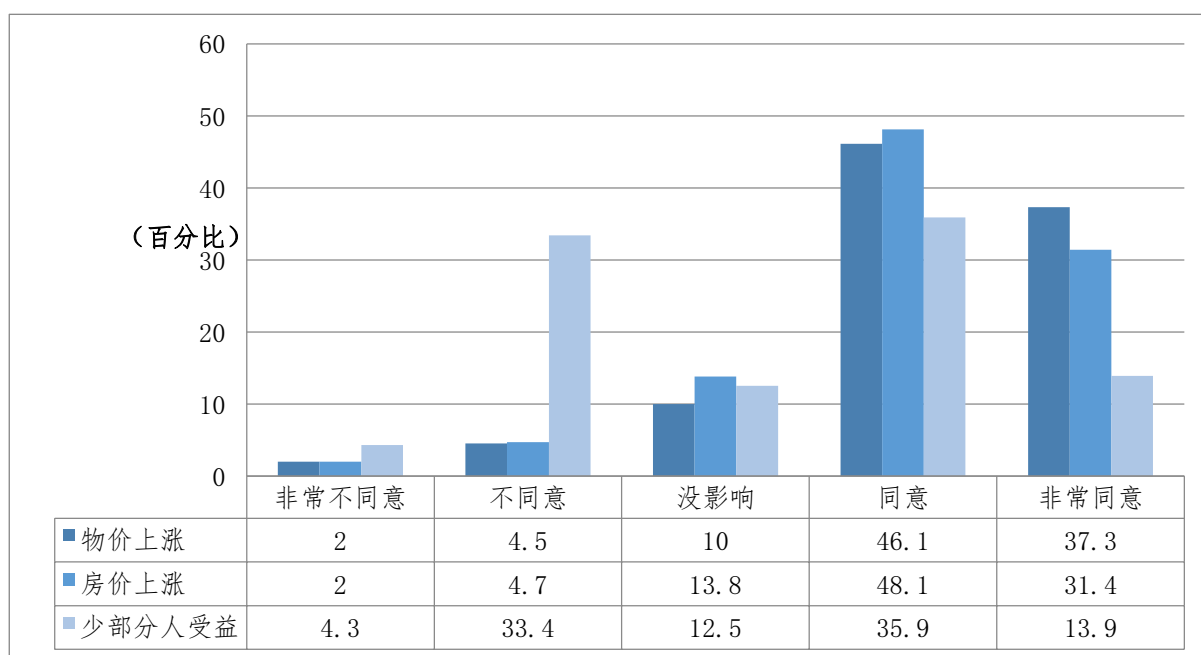


Figure 2-3 Negative evaluation of residents on economic impacts of tourism

Figure 2-3 reflects the negative evaluation of Yangshuo residents on economic impacts of tourism. 83.4% of residents think that tourism development has led to price hike; 79.3% think that tourism development has led to rise of housing price and 49.8% think that tourism only benefits a few people. Most of the respondents agree that tourism has lead to price hike and rise of housing price, however, large differences exist concerning the saying “tourism only benefits a few people”. 37.7% oppose that saying, 12.5% remain neutral and 49.8% agree with that saying.

Generally speaking, the perception of Yangshuo residents to economic impacts of tourism is relatively objective and real and has two sides. In figures 2-2 and 2-3, the options “agree” and “strongly agree” account for a large proportion. This indicates that the local residents have a clear perception over the positive and negative tourism impacts on economy. In their eyes, tourism is a “double-edged sword” to economic development. They acknowledge the role of tourism in pushing economic growth, and at the same time, express their concerns on the price hike and rise of housing price caused by tourism.

2.3.3 Perceptual Evaluation of Residents on Social and Cultural Impacts of Tourism

The perceptual evaluation of residents on social and cultural impacts of tourism is reflected in the 13 indicators in the questionnaire: “tourism has increased crime rate”, “tourism has

disturbed our former lives”, “tourism has restricted my use of tourism resources”, “tourism has greatly improved infrastructure”, “tourism has greatly improved medical facilities and services”, “tourism has increased the quantities of demolished old houses and newly built houses”, “tourism has promoted cultural exchanges with outside world”, “tourism has increased the local sense of pride and belonging”, “folk customs and cultural traditions have been ruined and forgotten”, “tourism has caused the tension between residents and tourists”, “tourism has ruined the local moral situation”, “more cultural or festival activities are held”, “tourism has involved more people in extension of traditional culture”, and “tourism has promoted local handicraft development”. The above 13 indicators are divided into two parts: Positive evaluation of residents on social and cultural impacts of tourism and negative evaluation of residents on social and cultural impacts of tourism. See figures 2-4 and 2-5 for more details.

2.3.3.1 Residents Have a High Positive Evaluation on Social and Cultural Impacts of Tourism

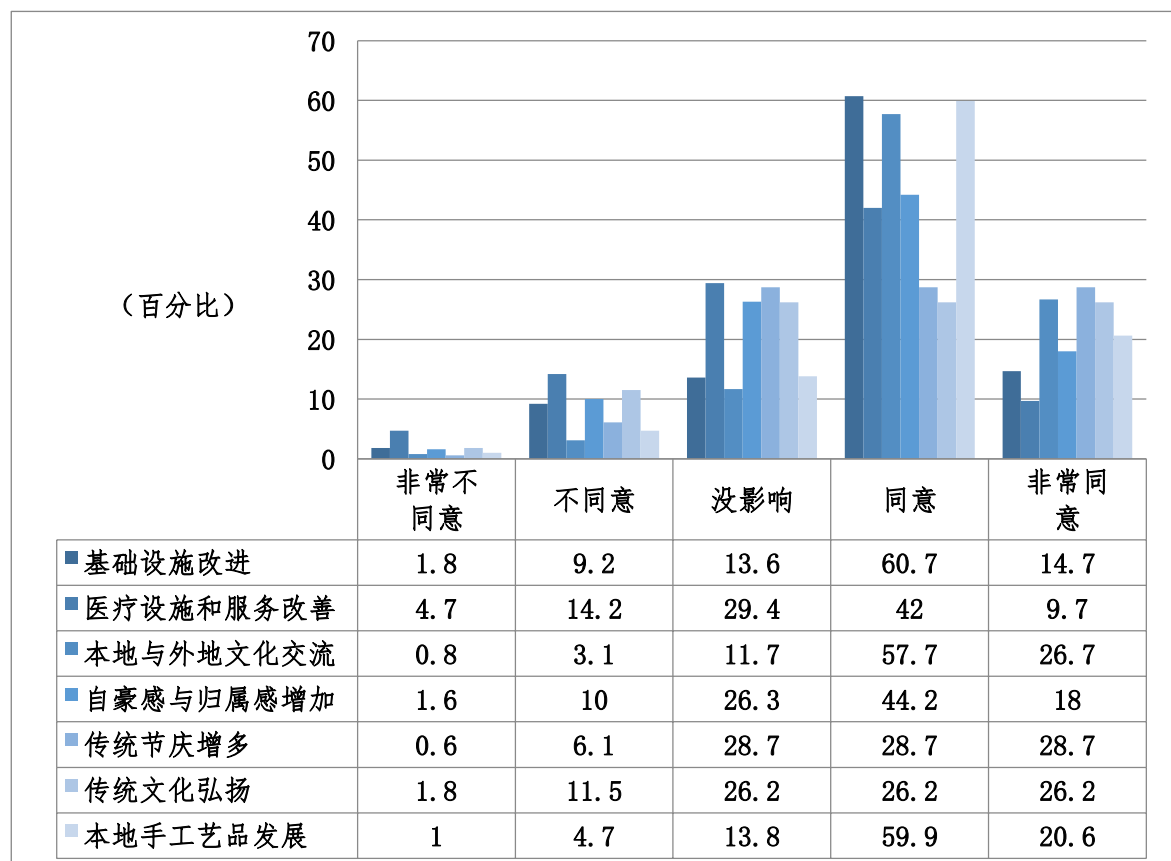


Figure 2-4 Positive evaluation of residents on social and cultural impacts of tourism

The 7 indicators in figure 2-4 show the positive evaluation of Yangshuo residents on social and cultural impacts of tourism. A large proportion of residents choose “agree” and “strongly

agree”. Most of residents think tourism has greatly improved infrastructure and agree that tourism has promoted cultural exchanges with outside world as well as local handicraft development. From an overall perspective, the “agree” percentage of these 7 indicators exceeds 50%, which indicates that the residents have a high positive evaluation on social and cultural impacts of tourism.

It can be seen from figure 2-4 that 84.4% of residents think tourism has promoted cultural exchanges with outside world, 80.5% think tourism has promoted local handicraft development, and 75.4% think tourism has greatly improved infrastructure. Only 10% disagree with these 7 indicators. Regarding “tourism has greatly improved medical facilities and services”, 18.9% hold a negative view while 29.4% remains neutral.

2.3.3.2 The Perception to Negative Social and Cultural Impacts of Tourism is not Obvious.

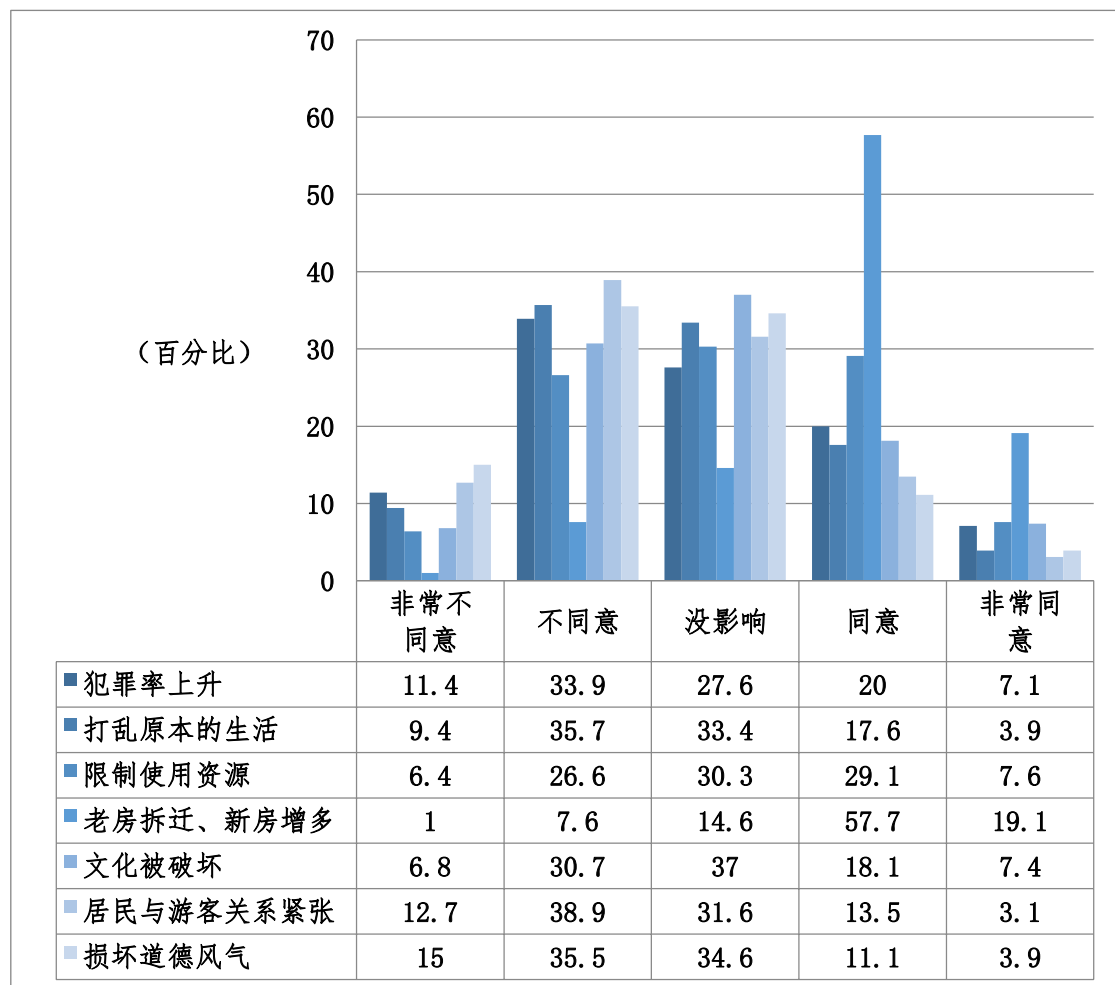


Figure 2-5 Negative evaluation of residents on social and cultural impacts of tourism

The 7 indicators in figure 2-5 show the negative evaluation of Yangshuo residents on social

and cultural impacts of tourism. It can be seen from the figure that except the indicator “tourism has increased the quantities of demolished old houses and newly built houses”, the options “disagree” and “neutral” account for a large proportion. This indicates that the perception of residents to negative social and cultural impacts of tourism is not obvious.

According to the statistics, only 15% of residents think that tourism has ruined the local moral situation, 16.6% agree that tourism has caused the tension between residents and tourists, and less than 30% think that tourism has increased crime rate (27.1%) and disturbed our former lives (21.5%) and that folk customs and cultural traditions have been ruined and forgotten (25.5%). Generally speaking, the residents have a relatively low perception to the negative social and cultural impacts brought by tourism growth. There is one exception: 76.8% agree that tourism has increased the quantities of demolished old houses and newly built houses and only 8.6% hold an opposite view thereon.

Regarding “moral situation”, the interview result shows that most of residents think that with the tourism development, the once simple and hospitable residents have become snobbish and hypocritical since they engaged in tourism business and their business contact with tourists became frequent. However, as tourism development has brought economic benefit to the local residents and improved their overall living standards, less theft and robbery are reported. As a result, the “crime rate” is reduced.

2.3.4 Perceptual Evaluation of Residents on Environmental Impacts of Tourism

2.3.4.1 Most of Residents Think Tourism Has Exacerbated Environmental Pollution.

The 5 indicators in the questionnaire - “tourism has aggregated air pollution”, “tourism has aggregated water pollution”, “tourism has aggregated noise pollution”, “tourism has increased solid wastes” and “guesthouses and other tourism facilities have ruined landscape aesthetics” - reflect the negative evaluation of residents on environmental impacts of tourism. See the following figure for indicators analysis

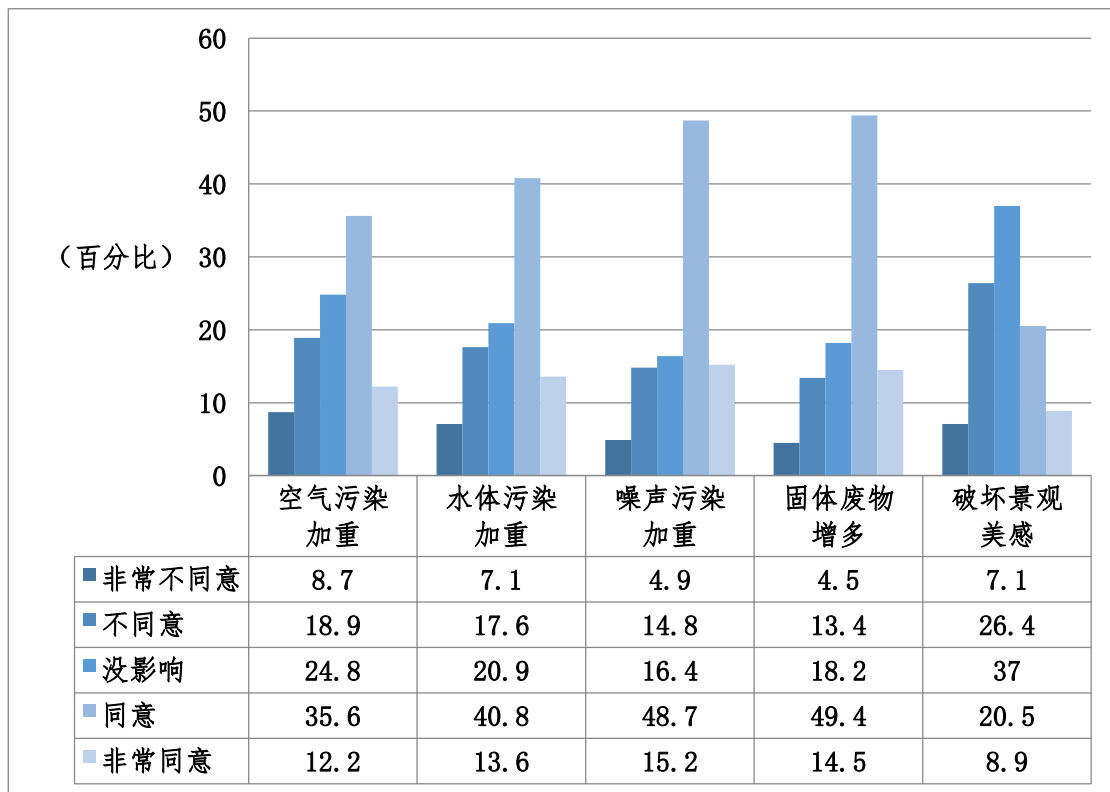


Figure 2-6 Negative evaluation of residents on environmental impacts of tourism

According to figure 2-6, most of residents think that tourism development has deteriorated local air and water, exacerbated noise pollution and increased solid wastes. The perception to noise pollution and solid waste pollution is the strongest. 63.9% of residents think that tourism has aggregated noise pollution and increased solid wastes. 54.4% think that tourism has aggregated water pollution and 47.8% think that tourism has aggregated air pollution. However, more than 16% of residents remain neutral over the environmental disruption caused by tourism. Generally speaking, although most of residents think tourism has brought a negative impact on environment, their opinions thereof are not consistent.

Regarding “guesthouses and other tourism facilities have ruined landscape aesthetics”, 29.4% agree on that point, 37% remains neutral and 33.5% holds an opposite view. This is the indicator which has the biggest gap.

2.3.4.2 The awareness of Residents on Environmental Protection has been Enhanced

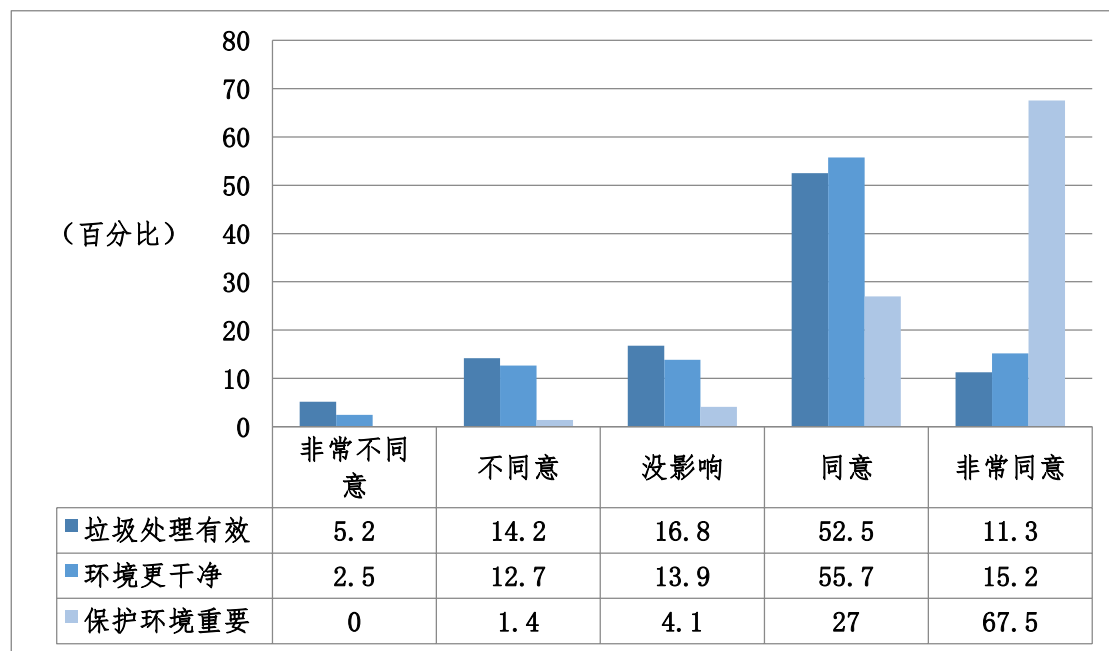


Figure 2-7 Positive evaluation of residents on environmental impacts of tourism

According to figure 2-7, 63.8% of residents think the wastes are disposed on a timely and efficient manner and 70.9% think the environment is cleaner than before. This indicates that although tourism development has deteriorated air quality and worsen water and solid waste pollutions, the local environmental protection measures have been strengthened. In addition, 94.5% of residents think that natural environment protection is important, which indicates the majority has a relatively high awareness on environmental protection.

2.3.5 Community Engagement

The percentage of community residents doing tourism-related jobs reflects the degree of community engagement; whether residents are willing to actively give advice on scenic zone development reflects the depth of community engagement; whether tourism decisions incorporate resident opinions and whether residents can obtain information on relevant government policies reflect the accessibility of community engagement. The residents' attention to and advice on tourism development reflect the awareness of community engagement. The respondents of 493 valid questionnaires are from the following residential places. See the following figure for more details:

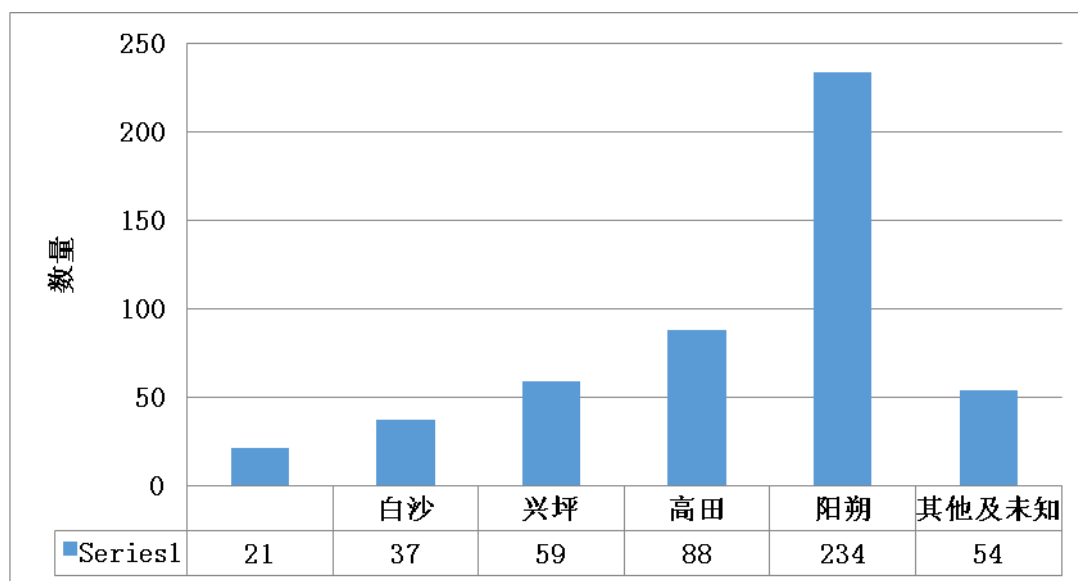


Figure 2-8 Number of questionnaires from each place

2.3.5.1 Although the Engagement of Community Residents in Tourism is High, the Engagement Level is Relatively Low.

The above figure shows where the respondents of 493 questionnaires are from. As the number of questionnaires from Fuli Town (21) and Baisha Town (37) is small, they can not be deemed as representative samples. Thus, the data from Xingping, Gaotian and Yangshuo is selected to analyze the community engagement.

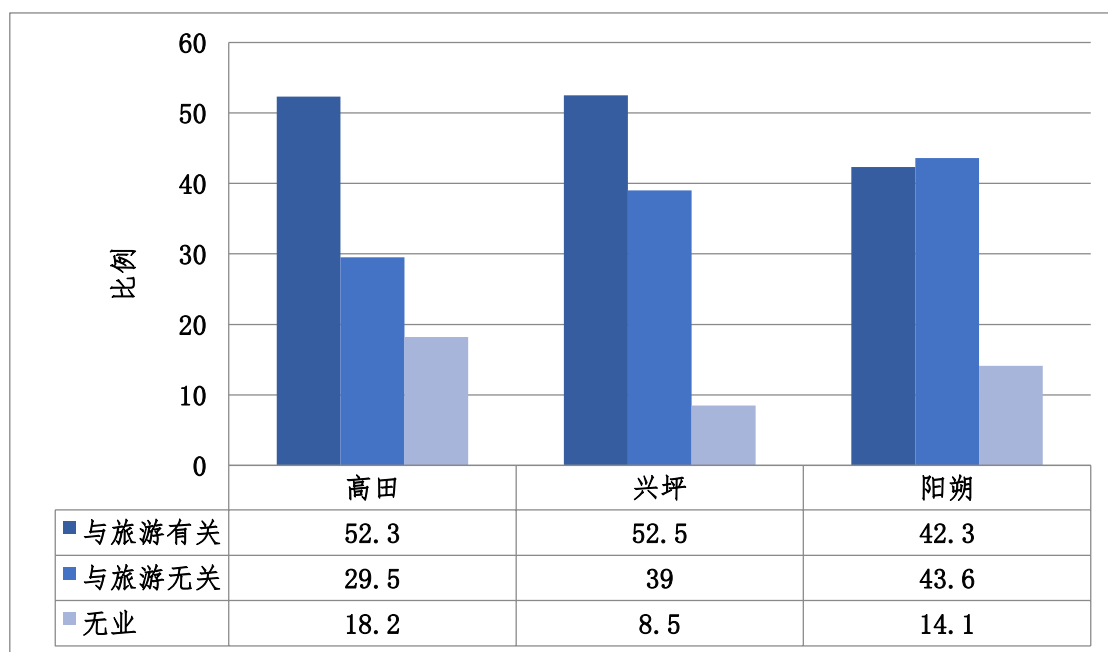


Figure 2-9 Resident engagement in tourism

The jobs of the respondents are classified into three categories: “tourism-related”, “nothing

to do with tourism” and “unemployed”. From the above figure, the degree of resident engagement in tourism is not high and still in the medium level. The percentages of resident engagement in tourism in Gaotian and Xingping are basically the same, accounting for 52.3% and 52.5% respectively. 42.3% of Yangshuo residents engage in tourism, with more room for improvement.

Regarding the type of work, the tourism-related jobs of residents in Gaotian Town, which are well distributed, include family inn owner, tour guide, driver, street vendor, rural restaurant owner, handicrafts seller, raftsmen, etc. The tourism-related jobs of residents in Xingping Town include tour guide, restaurant owner, special snacks seller, clothing store owner, waiter/waitress, etc. A large number of them are engaged in catering services. The tourism-related jobs of residents in Yangshuo Town include fruit seller, motorcycle renter, field guide, hotel owner, rural restaurant owner, receptionist, etc., and the field guide and restaurant owner outnumber the rest.

2.3.5.2 Residents Have a Relatively Strong Awareness on Participation in Tourism Decision Making, but the Degree of Participation is Low.

Table 2-2 Resident participation in tourism decision making

Indicator	Category	Disagree (Percentage)	Neutral (Percentage)	Agree (Percentage)
I'm willing to provide advice on the development of the scenic zone.	Xingping	20.3	27.1	52.5
	Gaotian	5.7	35.2	56.8
	Yangshuo	6.4	34.2	56.8
Some decisions of the scenic zone incorporate our advices.	Xingping	39	30.5	28.8
	Gaotian	52.3	21.6	23.9
	Yangshuo	43.2	29.9	24.8
I've received information on government policies.	Xingping	35.6	33.9	27.1
	Gaotian	48.9	27.3	21.6
	Yangshuo	40.6	26.9	30.3

Table 2-2 reflects the participation of residents in tourism decision making in Xingping, Gaotian and Yangshuo. This involves three aspects: “I’m willing to provide advice on the development of the scenic zone”, “some decisions of the scenic zone incorporate our advices”, and “I’ve received information on government policies”.

It is clear from the table that most of residents (over 50%) from these three places are willing to provide advice on the development of the scenic zone and participate in tourism decision making. This indicates the local residents have a relatively high awareness on participation in tourism development. Regarding “some decisions of the scenic zone incorporate our advices”, the percentage of residents from these three places choosing “disagree” outnumbers the percentages of those choosing “neutral” and “agree”. 52.3% of Gaotian residents choose “disagree”, showing their high discontent with the government. 43.2% of Yangshuo residents and 39% of Xingping residents choose “disagree. The percentages of “agree” in Gaotian, Yangshuo and Xingping are less than 30%, accounting for 23.9%, 24.8% and 28.8% respectively. In addition, residents meet a big obstacle in obtaining information on government policies. 35.6% of Xingping residents think that they fail to obtain any information on government policies, and 40.6% of Yangshuo residents and 48.9% of Gaotian residents think so.

It is concluded from the community engagement that: (i) The degree of resident engagement in tourism is not high and still in the medium level. There is more room for improvement; (ii) The willingness of residents to participate in the development of scenic zone is high and the awareness thereof is strong; (iii) The residents’ right to make suggestions and their right to make decision are not enough. Less attention is paid to their advices; and (iv) Residents meet a big obstacle in obtaining information on government policies.

2.4 Typical Community Case Analysis

2.4.1 Licun Village

There are four ways for residents of Licun Village to engage in tourism: 1. Being an investor. Residents having a certain amount of money will choose to start their own business, such as running a guesthouse, restaurant, specialty store or souvenir store; 2. Being an employee in those guesthouses, restaurants and stores; 3. Being an employee in the travel agency, such as tour guide, cleaner, driver, etc.; and 4. Being unemployed or those having no regular and permanent job. The

jobs available to these residents are mainly offered in Shangyue Scenic Zone and Ten miles Gallery.

In the survey, a total of 32 questionnaires were distributed in Licun Village, half for men and half for women. The result is analyzed through positive and negative impacts of tourism:

2.4.1.1 Positive Impact

Firstly, most of the villagers think that tourism is good for Yangshuo development, benefits local people and has increased economic income and brought more job opportunities. 87.5% of the villagers agree that tourism is good for local development and benefits local people. 75% acknowledge that tourism has brought more job opportunities and increased economic income. More than 90% of the villagers think that tourism has greatly improved infrastructure, medical facilities and services, and increased the quantities of demolished old houses and newly built houses. More than 50% of the villagers are satisfied with their current income.

Secondly, 62.5% of the villagers have a strong sense of pride and belonging to Yangshuo. They are not engaged in tourism-related jobs, but they show a great concern about tourism development and try every effort to safeguard Yangshuo's image. Regarding the questions "tourism has increased crime rate", "tourism has disturbed our former lives", "folk customs and cultural traditions have been ruined", "tourism has caused the tension between residents and tourists", and "tourism has ruined the local moral situation", they basically choose "disagree". However, residents living in the urban area and engaged in the jobs other than tourism has a less "sense of belonging" to Yangshuo. The five-point Likert scale shows that the index of Licun villagers concerning "I'm willing to provide advice on the development of the scenic zone" is in the middle-high level to 3.4375. This demonstrates that Licun villagers have a strong sense of pride and belonging to Yangshuo.

2.4.1.2 Negative Impact

Although tourism development has attracted more investment and consumption, more than 90% of the villagers agree that "tourism has led to price hike". The villagers' income has been increased, but the increase level is low compared with the increase of local prices. Licun Village has its special case: 1. Different from those living in the urban area, Licun villagers don't need to buy a house, so 40.63% of the villagers have no perception to the point "tourism development has

led to rise of housing price”; 2. The educational level of Licun villagers is low. Most of them only have a middle school level or primary school level and work at a low level, so seldom of them obtain benefit from tourism receipts. The government only gives subsidy to those living in Chuanyan Village in the scenic zone each year. Even those aged over 70 or 80 in Licun Village have to live on their own efforts, so half of the villagers think Yangshuo tourism only benefits a few people and blame this for the government.

56.25% of the native Licun villagers think that “tourism has restricted my use of tourism resources”. Most of them witnessed the initial stage of Yangshuo tourism. Since the surrounding area of the village became scenic zone, no free access to the zone was allowed. With the development of Yangshuo tourism, the environmental quality of Licun Village has degraded. This is an inevitable problem brought by the increase of vehicles and tourists flow rate. 43.75% of the villagers think that “tourism has aggregated air pollution”, 50% think that “tourism has aggregated water pollution”, and 53.13% think that “tourism has increased solid wastes”.

In conclusion, as a typical tourism community of Yangshuo, Licun Village not only reflects the advantages (such as infrastructure improvement and more job opportunities) and disadvantages (such as change of environmental quality) brought to residents and villagers by tourism, but also indicates a special situation: The way to solve the villager’s employment problem due to low education level and high age is very limited and the villagers have a deeper feeling for Yangshuo than urban residents.

2.4.2 Adjacent Communities of Xingping Pier

46 questionnaires were distributed to the adjacent communities of Xingping pier, 57% for men and 43% for women. Near the mountains and by the river, Xingping Ancient Town is located in the northeast of Yangshuo and 25km away from the county. It is found upon field observation that the water in Xingping is clearer than that in Yangshuo. The reason is that the Lijiang River section in Xingping is cleaned up by villager everyday. The service awareness in Xingping is better than Yangshuo. For example, the raftsman will remember each tourist’s face while they are traveling in Lijiang River and will take the initiative to care for and greet tourists or introduce the scenic spots while they are visiting the scenic spots onshore. There are eight scenic spots in Xingping, such as Painted Hill of Nine Horses,, Luoshi Mountain, Lotus Rock, Heavenly Water

Stockaded Village and Lingbao Pavilion. The original historical environment is well-preserved, leaving tourists an impression of “long old street and deep ancient alley”. However, the number of tourists in Xingping is less than that of Yangshuo, and is on the decline each year. The reason of this is that Xingping is far from the county, so it is impossible for tourists to visit there within three days, which are the travel time for most of tourists. Besides this, the poor infrastructure there will bring a bad impression to tourists. Many roads to Xingping are rough and less supporting facilities (such as toilet) are provided near the port, which is the first station the tourists arrive at in Xingping. The length of stay in Xingping is short and not many tourists choose to stay there overnight. The stores on the main street run well, but those situated in the remote area of the old street or deep in the alley are hard to survive. In questionnaire distribution, some residents said that they sold nothing from the morning until now (at about 4pm). Sometimes they earned two or three Yuan a day, and sometimes, a few dozen Yuan a day.

The following is the conclusion from the questionnaires distributed to Xingping residents:

2.4.2.1 Economic Impact

First of all, many residents acknowledge the public welfare “opportunities” brought by tourism. 89% of residents agree that “tourism is good to local development”, 67.39% think that “tourism benefits local people”, and 73.91% think that Tourism development has brought more job opportunities and attracted more investment and consumption. It is generally believed that although tourism development brings more job opportunities, it is not related to the increase of economic income. Only 58.7% of residents think that “tourism development has increased economic income” and 73.9% are not satisfied with their current income. 82.61% of residents agree that tourism development has led to price hike. The price hike faster than the income increase is the direct reason leading to resident dissatisfaction.

2.4.2.2 Social and Cultural Impacts

32.61% of residents agree or strongly agree that “tourism has increased crime rate”. It is found in the survey that the perception of residents to “crime rate” is related to the places where they live and work. Generally speaking, residents living in the busy street agree on that point, because robbery is quite common to them. However, residents living in the old street or narrow alley are OK with the security. It is concluded from this that the crime rate in Xingping has

increased. 60.87% of residents think that tourism has disturbed their former lives. Although the number of tourists decreased in recent years, they still thought that their lives were disturbed. More than 50% of residents agree that tourism has increased the local sense of pride and belonging.

2.4.2.3 Environmental Impact

The overall environment of Xingping is better than Yangshuo, but 52.17% of residents think that tourism has aggregated air pollution, 67.39% think that tourism has aggregated water pollution, 63.04% agree or strongly agree that tourism has aggregated noise pollution, and 73.91% agree that tourism has increased solid wastes. In other words, like other places, Xingping also faces some negative impacts brought by tourism. The awareness of Xingping residents on environmental protection is very strong. Nearly 90% of them agree or strongly agree that it is very important to protect the natural environment.

Generally speaking, tourism has brought environmental impacts to Xingping Ancient Town and the crime rate there is higher than Yangshuo because the government pays less attention to Xingping than Yangshuo. As the resident income is low and the business is poor, more complaints about the government are heard. Residents there prefer comfortable life. They generally think that their lives have been disturbed by tourists. They love their home so much and have a strong sense of belonging.

2.5 Summary

Generally speaking, Yangshuo residents have higher satisfaction to the local tourism development. Most of them think that tourism is good for local development and benefit local people. Those who receive positive impacts support the tourism development. The residents acknowledge that tourism development has driven and promoted economic growth, attracted more investment, increased consumption and improved living standard, but they also have a strong perception towards the negative economic impacts brought by tourism, such as price hick and rise of housing price. The positive evaluation on social and cultural impacts of tourism is high and the perception to its negative impacts is not clear. It is generally thought that tourism has promoted cultural exchanges with outside world, promoted local handicraft development and increased the local sense of pride. The relation between residents and tourists is relatively

harmonious and no obvious interest conflict is found. As for the environment aspect, although tourism development has exacerbated air pollution, water pollution and solid waste pollution, the environmental measures are further strengthened compared with those set before the tourism development, which reduces the residents' discontent with the environmental impacts. From the perspective of current development, more Yangshuo residents engage in tourism; the willingness and awareness of local tourism engagement by residents are strong. But the residents' right to make suggestions and their right to make decision are not enough. Less attention is paid to their advices. Residents meet a big obstacle in obtaining information on government policies.

Chapter III Tourist Satisfaction

3.1 Tourist Evaluation on Yangshuo Tourism Resources

The evaluation on satisfaction of Yangshuo tourists is done through questionnaire survey. To evaluate the tourist satisfaction, a series of indicators are used to measure tourist perception to products and services and the tourist behavior characteristics are analyzed. The monitoring started from July 6, 2013 and ended on July 12, 2013. The survey group randomly picked domestic and foreign tourists in the major scenic spots of Yangshuo, such as West Street, Yangshuo bus station, Yangshuo Park, adjacent area of Ten miles Gallery and Xingping Ancient Town, as the respondents. In the survey, a total of 1050 questionnaires were distributed, of which 793 out of 800 to domestic tourists are valid and 242 out of 250 to foreign tourists are valid. Such tourist behavior characteristics like travel mode, tourist motive and consumer preference are included in the questionnaire, which shows the tourist preference of the target market of Yangshuo, a mature tourism destination. The tourist satisfaction survey consists of three parts: Tourism resources evaluation, tourism service evaluation and tourism environment evaluation. The survey content of these three is divided into 32 secondary indicators and 5 satisfaction levels (strongly agree (5), agree (4), neutral (3), disagree (2) and strongly disagree (1)) through the five-point Likert scale. To measure the tourist satisfaction to Yangshuo tourism, it is necessary to calculate the average value of each indicator and the percentages of tourists choosing strongly agree and agree (5 and 4). The overall evaluation of tourists of Yangshuo tourism and their willingness to revisit and recommend the place are also required if we need to know the sustainability of Yangshuo tourism. In addition, the tourist complaints from Yangshuo County Tourism Bureau are used herein as an auxiliary indicator to measure the tourist satisfaction.

3.1.1 Tourist Satisfaction Monitoring Indicators

The questionnaire, with the application of a five-point scale, consists of 33 questions which are classified into three evaluation aspects and one overall evaluation. The evaluation on tourist resources includes 7 indicators, which are divided into two parts – resource features and resource

conservation; the evaluation on tourism service includes 19 indicators. To better measure and monitor the quality of different products and services, these indicators are divided into five parts based on the product type - scenic spot service, food and beverage, accommodation, transportation and shopping. The 6 indicators included in the evaluation on overall environment reflect different degrees of perception to human environment and natural environment. In addition to the above three evaluations, an overall evaluation is also included in the questionnaire.

3.2 Tourist Behavior Characteristics

3.2.1 Travel Methods of Tourists: DIY Tour Plays a Dominate Role

It can be learnt from the results of figure 3-1 that DIY tour is popular in Yangshuo among tourists at home and abroad. Nearly half (49.4%) of the domestic tourists and 71.1% of the foreign tourists choose DIY tour. 33.3% of the domestic tourists and 25.9% of the foreign tourists choose to join a tour group on their own or with their families and friends. The number of domestic tourists choosing to join a tour group with their families and friends is more than the number of those choosing to do so on their own, while the number of foreign tourists choosing to do so with families and friends is close to the number of those choosing to do so on their own. 12.9% of the domestic tourists choosing to join in a tour organized by the work organization. This indicates that Yangshuo begins to become a destination of the incentive tour given by the company. Guangxi and Guangdong are the main tourist sources in this aspect. There are some from Shanghai and Jiangsu. The increase of 2.8% in the number of tourists in this aspect compared with last year indicates that the number of tourists joining a tour organized by the work organization grows steadily. The percentage of tourists visiting Yangshuo for conference and field observation is very low, accounting for 0.4% (domestic) and 0% (foreign) respectively. Although it is found from the report for the first half of 2012 that many five-star or five-star standard high-end hotels have been built, no obvious growth in the number of tourists joining a convention tour is shown due to the need of business conference facilities for long-term preparation and development and the policy to restrict travel at public expenses this year.

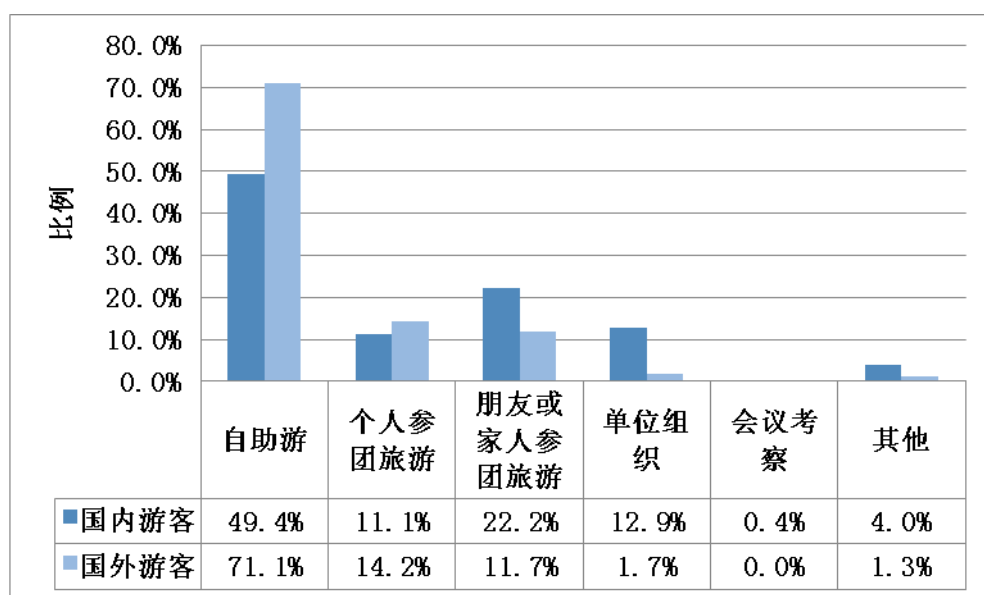


Figure 3-1 Comparison of travel methods between domestic and foreign tourists

3.2.2 Tourism Motivations: Sightseeing and Holiday, Difference between Domestic and Foreign Tourists

68.6% and 64.7% of the domestic tourists go to Yangshuo for sightseeing and on holidays. The percentage of tourists for learning culture and delicacies is 21.3%, which is higher than that of 2012 (13.1%). Compared with the data last year, the number of tourists goes to Yangshuo for photography and wild adventure increases slightly, accounting for 10.5% and 3.7% respectively. This indicates that tourists begin to travel for special motivations. But foreign tourists are different. 71.1% of the foreign tourists go for sightseeing, which accounts for the highest proportion of all tourism motivations. 43.4% of them go there on holidays, which is much lower than that of the domestic ones. This demonstrates that natural environment is still the main factor that attracts foreign tourists to Yangshuo. The most obvious difference between domestic and foreign tourists lies in the motivation of wild adventure. 24% of the foreign tourists go to Yangshuo for field exploration, rock climbing and other outdoor activities, of which 2.5% are specially for rock climbing. The percentage of foreign tourists going there for visiting relatives and friends is higher than that of the domestic ones. Other motivations include learning Tai Ji and Chinese (2.9%) and teaching foreign languages (2.5%).

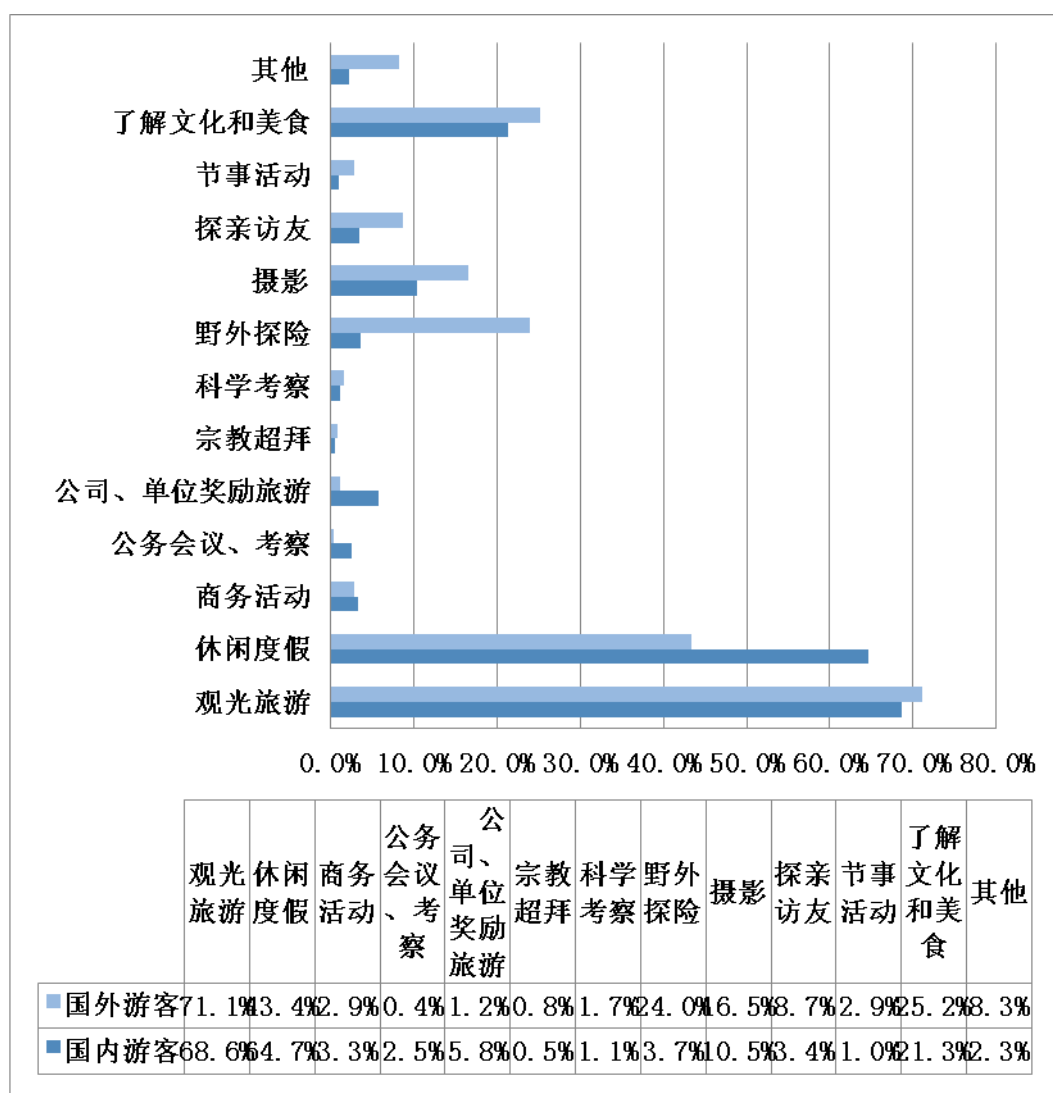


Figure 3-2 Comparison of tourism motivations between domestic and foreign tourists

3.2.3 Length of Stay: Most of Tourists Stay There for a Short Time. The Length of Stay of the Foreign Tourists is Long than that of the Domestic Tourists.

76.7% of the domestic tourists and 61.6% of the foreign tourists stay in Yangshuo for 1 to 3 days. Foreign tourists tend to stay there for a longer time. 20.7% of them stay there for 4 to 7 days, a percentage of which is higher than that of the domestic tourists (17.2%). The percentage of foreign tourists staying in Yangshuo for over 7 days is 17.7%, much higher than that of the domestic tourists, which only accounts for 6.1%.

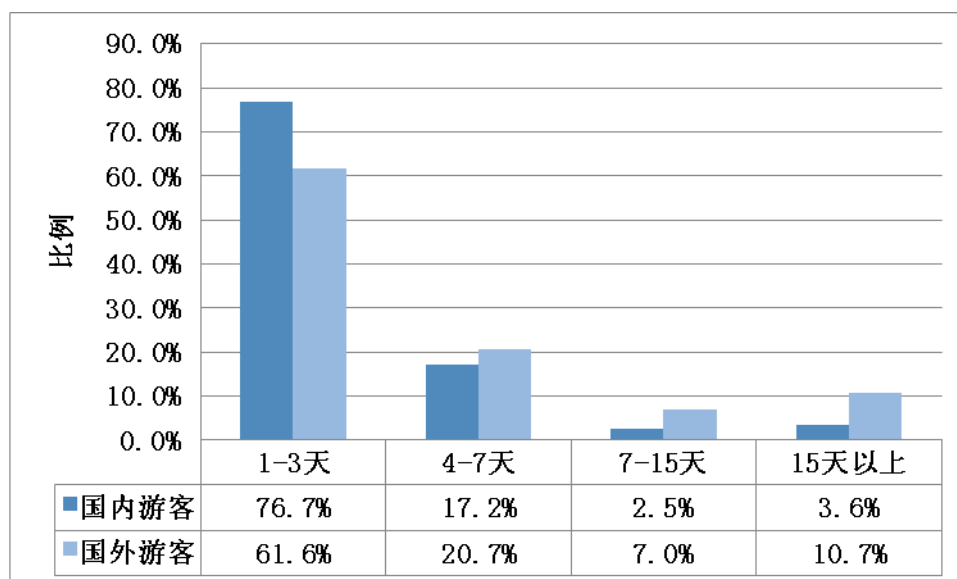


Figure 3-3 Comparison of the length of stay between domestic and foreign tourists

3.2.4 Accommodation Facilities: Guesthouses and Youth Hostels are Preference.

As shown in figure 3-4, most of the domestic tourists (42.1%) choose guesthouses, followed by star hotels (26.7%). 23.2% choose youth hostels, which is higher than that of last year (18.9%). Youth hostels have attracted more and more attentions from tourists at home. Different from the domestic tourists, most of the foreign tourists (38.2%) choose youth hostels. According to the survey, the youth hostels in West Street and its adjacent alleys are popular among foreign tourists. The percentage of foreign tourists choosing to live in star hotels (25.6%) is pretty close to that choosing to live in guesthouses (24.8%), both of which are close to 25%. In the option of others, ordinary hotels are the main choice among tourists.

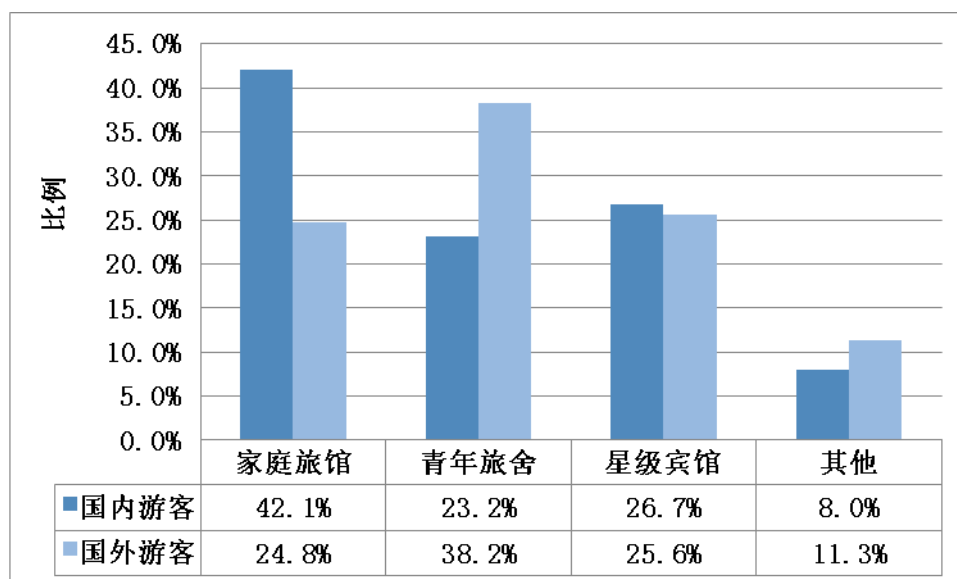


Figure 3-4 Comparison of accommodation facilities between domestic and foreign tourists

3.2.5 Total Tourism Spending: The Total Spending is Low and Less Than Last Year.

The tourism spending (total spending) of domestic and foreign tourists is low. In most cases, the spending is lower than 500 Yuan (22.6% for domestic tourists and 23.5% for foreign tourists) and between 500 and 1000 Yuan (40.1% for domestic tourists and 34.0% for foreign tourists). The short length of stay is the main reason that causes a spending of less than 500 Yuan. As shown in figure 3-5, the percentage of foreign tourists spending over 1500 Yuan is higher than that of the domestic ones. Compared with last year, the tourism spending of both domestic and foreign tourists drops significantly. The number of domestic tourists spending less than 1000 Yuan rises by 18%, while the number of foreign one spending over 2000 Yuan drops by 8%.

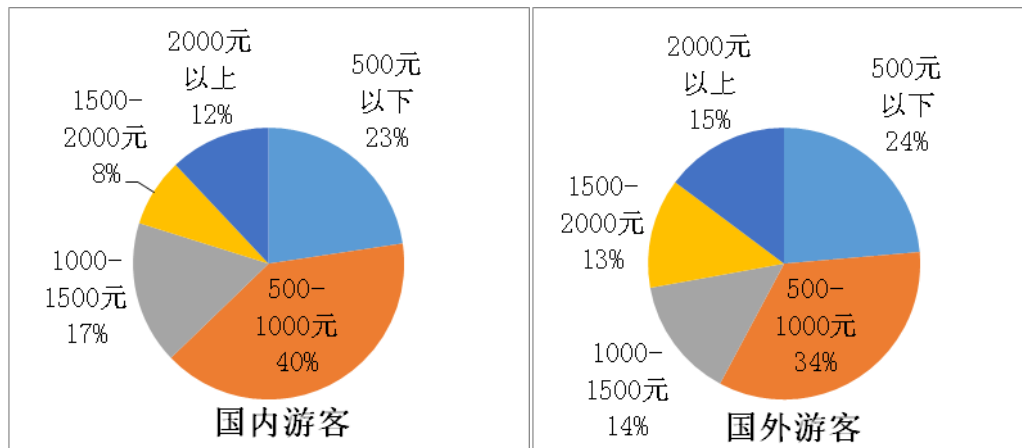


Figure 3-5 Comparison of total tourism spending between domestic and foreign tourists

3.2.6 Means of Transportation: Diverse Options

As shown in figure 3-6, most of tourists, at home and abroad, go to Yangshuo by long-distance and short-distance buses, because many will visit Guilin before Yangshuo. Regarding the means of transport in Yangshuo, as shown in figure 3-7, most of the domestic tourists choose to travel by bike (35.6%), on foots (34.0%), by sightseeing bus (29.6%), by ship (14.0%), by own car (10.0%) or by rented car (7.7%), while the percentages of foreign tourists traveling by bike, on foots, by rented car, by ship and by sightseeing bus are 60.7%, 51.7%, 22.3%, 19.0% and 15.3% respectively. It can be seen from data comparison that the foreign tourists prefer contact with nature and more than half of them travel by bike and on foots, while the domestic tourists still rely on sightseeing bus, which is a major transportation tool for tour group.

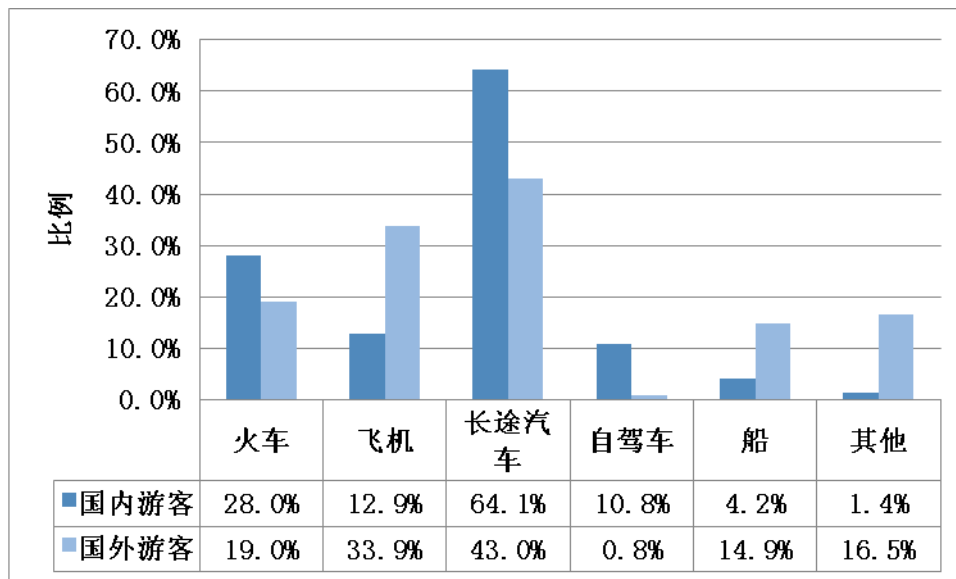
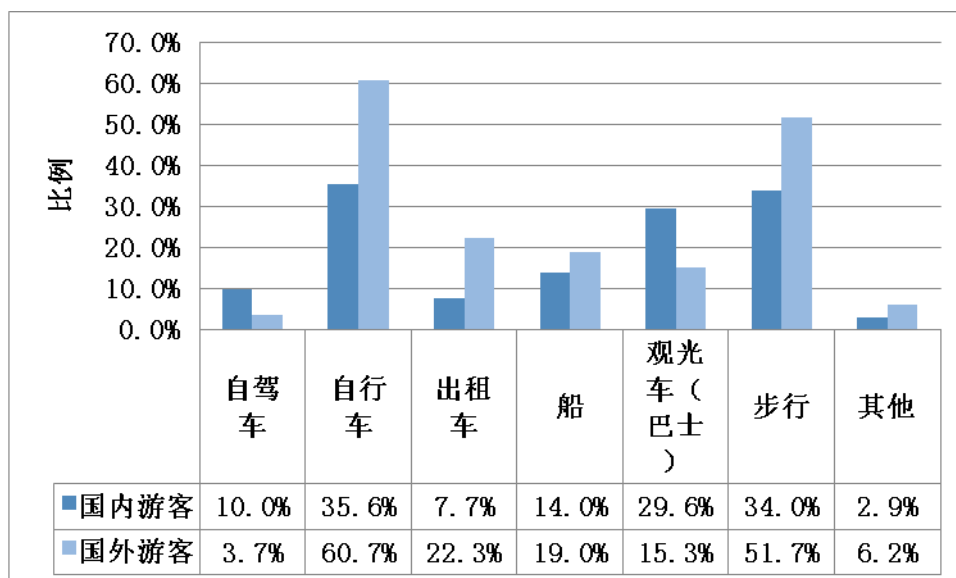


Figure 3-6 Comparison of means of transport between domestic and foreign tourists to Yangshuo



Self-driving car	Bike	Rented car	Ship	Sightseeing bus	On foot	Others
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Figure 3-7 Comparison of means of transport between domestic and foreign tourists in Yangshuo

3.3 Tourist Satisfaction

3.3.1 The Evaluation on Tourism Resources is High

The tourist evaluation on tourism resources in the questionnaire is composed of two parts: resource features and resource conservation. The resource features include five indicators: abundant natural resources, the most beautiful scenery in China, locally featured cultural landscape, a good experience of the local food culture, and getting satisfied souvenirs and crafts. The resource conservation includes three indicators: Good water quality of Lijiang River, good water quality of Yulong River and well-preserved cultural landscape.

Table 3-2 Domestic tourist evaluation on tourism resources

Monitoring aspect		Monitoring indicator	Average	Variance	Satisfaction proportion
Evaluation on tourism resources	Resource features	Abundant natural resources and picturesque landscape	4.388889	0.480269	91.18%
		The most beautiful scenery in China	4.091653	0.752242	75.33%
		Locally featured cultural landscape	3.918033	0.725618	71.24%
		A good experience of the local food culture	3.559934	0.990234	52.29%
		Getting satisfied souvenirs and crafts	3.538588	0.989051	52.94%
	Resource conservation	Good water quality of Lijiang River	3.852217	0.793914	68.63%
		Good water quality of Yulong River	3.835	0.78909	52.12%
		Well-preserved cultural landscape	3.609917	0.884007	55.56%

Table 3-3 Foreign tourist evaluation on tourism resources

Monitoring aspect		Monitoring indicator	Average	Variance	Satisfaction proportion
Evaluation on tourism resources	Resource features	Abundant natural resources and picturesque landscape	4.726891	0.275308	96.22%
		The most beautiful scenery in China	4.155963	0.82349	67.65%
		Locally featured cultural landscape	4.108225	0.583889	76.05%
		A good experience of the local food culture	3.957627	0.70458	76.47%
		Getting satisfied souvenirs and crafts	3.294872	1.050017	42.44%
	Resource conservation	Good water quality of Lijiang River	3.405172	0.926034	43.70%
		Good water quality of Yulong River	3.425339	0.863719	43.70%
		Well-preserved cultural landscape	3.666667	1.110145	60.08%

According to the questionnaires for domestic and foreign tourists in 2013 (tables 3-2 and 3-3), 91.18% of the domestic tourists and 96.22% of the foreign tourists are satisfied with the abundant natural resources and picturesque landscape in Yangshuo. But the proportion of satisfaction to locally featured cultural landscape is lower, of which the domestic tourists account for 71.24 and the foreign tourists account for 76.05%. The proportion of tourist satisfaction to souvenirs is not high, of which the domestic tourists account for 52.94% and the 52.94% 42.44%. According to the field survey and interview, the souvenirs and crafts in Yangshuo are very similar to those in Xiamen, Fenghuang and other tourist destinations. Tourist souvenir homogenization is a phenomenon commonly existed in China. Regarding the local food culture,

the satisfaction proportion of domestic tourists is 52.29%, while the satisfaction proportion of foreign tourists is 76.47%. In other words, the local food satisfies more foreign tourists than domestic tourists. The food culture of Yangshuo is relatively monotonous and the once specials have become quiet common in Yangshuo. The Chinese high requirement for food, the less obvious uniqueness of the local food culture, and the difference between foreign food culture and Chinese food culture lead to the higher satisfaction of foreign tourists with local food than domestic tourists.

Regarding resource conservation, the domestic tourists think the water quality of Lijiang River is better than that of Yulong River. However, the field survey shows that the water quality of Yulong River is better. According to the interviews, many domestic tourists who choose to go to Lijiang River have been to Yulong River. Many foreign tourists think the water quality of both Lijiang River and Yulong River is not good and only 43.70% of them are satisfied. As for cultural landscape preservation, both tourists at home and abroad don't think the cultural landscape is well-preserved and only 55.56% of the domestic tourists and 60.08% of the foreign tourists are satisfied.

3.3.2 Evaluation on Tourism Services of Yangshuo

According to the questionnaire, tourists evaluate tourism services through five aspects: scenic spot service, food and beverage service, accommodation service, transportation service and shopping service.

3.3.2.1 Low Satisfaction with Scenic Spot Service

There are three evaluation indicators: reasonable ticket pricing for scenic spots, good service quality of scenic staff, clear tour description.

Table 3-4 Domestic tourist evaluation on scenic spot service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Scenic spot service	Reasonable ticket pricing for scenic spots	3.072368	0.979927	32.19%
		Good service quality of scenic staff	3.391667	0.889747	44.93%
		Clear tour description	3.436975	0.801998	43.95%

Table 3-5 Foreign tourist evaluation on scenic spot service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Scenic spot service	Reasonable ticket pricing for scenic spots	3.612069	0.697343	52.52%
		Good service quality of scenic staff	3.743478	0.750503	60.08%
		Clear tour description	3.629956	0.818214	55.04%

According to the evaluation of domestic and foreign tourists on scenic spot service (tables 3-4 and 3-5), the satisfaction is not high. But, the satisfaction of foreign tourists is slightly higher than that of domestic tourists. As for ticket pricing, the satisfaction proportions of domestic tourists and foreign tourists are 32.19% and 52.52% respectively. The low satisfaction in this regard is relevant to Yangshuo's opaque pricing of tourism. As for the service quality of scenic staff, the satisfaction of foreign tourists is higher than that of domestic tourists. It is found in the field survey that the scenic staff prefers to serve the foreign tourists because they pay more for products.

3.3.2.2 Low Satisfaction with Local Food and Beverage Service

There are three evaluation indicators: food specialties, food hygiene and safety and reasonable price.

Table 3-6 Domestic tourist evaluation on food and beverage service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Food and beverage service	Food specialties	3.349259	0.900919	43.63%
		Food hygiene and safety	3.249175	0.832024	35.30%
		Reasonable price	3.168317	0.983193	34.15%

Table 3-7 Foreign tourist evaluation on food and beverage service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Food and beverage service	Food specialties	3.653846	0.948333	58.82%
		Food hygiene and safety	3.700422	0.778517	59.24%
		Reasonable price	3.683544	0.903669	63.03%

According to the above two tables (tables 3-6 and 3-7), less than 50% of the domestic tourists are satisfied with the local food and beverage service, the percentage of which is lower than that of foreign tourists. Generally speaking, the satisfaction of tourists at home and abroad is not high. It is found from the interviews that Yangshuo fails to satisfy tourists in food specialties, hygiene and safety and price. The homogeneity of food and opaque pricing bring the tourists a negative feeling on the local diet.

3.3.2.3 Basic Satisfaction with Local Accommodation Service

There are three evaluation indicators: good quality of room-and-board staff service, accommodation hygiene and safety and reasonable price.

Table 3-8 Domestic tourist evaluation on accommodation service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Accommodation service	Good quality of room-and-board staff service	3.401993	0.803191	45.10%
		Accommodation hygiene and safety	3.504934	0.886302	50.50%
		Reasonable price	3.46589	0.752585	46.57%

Table 3-9 Foreign tourist evaluation on accommodation service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Accommodation service	Good quality of room-and-board staff service	4.025974	0.660192	72.69%
		Accommodation hygiene and safety	3.940171	0.708851	72.69%
		Reasonable price	3.888889	0.742966	69.75%

According to the above two tables (tables 3-8 and 3-9), the average of foreign tourist satisfaction with accommodation service is about 4. In other words, most of the foreign tourists are satisfied with the local accommodation. The average of domestic tourists is 3.5, which indicates that many of them remain neutral to accommodation. The satisfaction proportion of foreign tourists is apparently higher than that of domestic tourists. According to the interviews, the reason of this is that the domestic tourists have higher requirement for accommodation than foreign tourists and the accommodation facilities chosen by foreign tourists are generally better than those by domestic tourists.

3.3.2.4 Different Evaluations on Transportation Service

There are three evaluation indicators: Convenient traffic, clear traffic signage, and reasonable price.

Table 3-10 Domestic tourist evaluation on transportation service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Transportation service	Convenient traffic	3.357377	0.965668	46.08%
		Clear traffic signage	3.345964	1.002224	43.95%
		Reasonable price	3.472727	0.951656	48.37%

Table 3-11 Foreign tourist evaluation on transportation service

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Transportation service	Convenient traffic	3.357447	1.016985	50.00%
		Clear traffic signage	3.097872	1.139953	37.82%
		Reasonable price	3.573913	0.787089	54.62%

According to the above two tables (tables 3-10 and 3-11), the average of domestic and foreign tourists' satisfaction with transportation is about 3.3. It can be seen from the variances that a big gap exists in the transportation service evaluation between domestic and foreign tourists, for the traffic convenience varies with the means of transport and travel methods. According to the interviews, the public transport in Yangshuo is not convenient and the public transit system is not complete. Many places need to be reached by bike or bus. Different from those in a package tour who can go everywhere by tourist bus, the DIY tourists will have a deeper experience of traffic inconvenience. Communication is the main reason that leads to the fluctuation of foreign tourist satisfaction. It is found upon our observation in Yangshuo station that foreign tourists are not clear about the bus schedule. Sometimes, they need some advices for fear of missing the bus. It would be better if they are with a Chinese tour guide. These factors can also explain why the satisfaction with transportation service fluctuates greatly.

3.3.2.5 Low Evaluation on Shopping and Entertainment

There are five evaluation indicators: good service quality of employees at small shops around, tourism product homogenization, fake and shoddy tourism products, reasonable prices for tourism commodities, and diversity of recreational activities.

Table 3-12 Domestic tourist evaluation on shopping and entertainment

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Shopping and entertainment	Good service quality of employees at small shops around	3.323283	0.896991	41.50%
		Tourism product homogenization	3.706868	0.895473	57.19%
		Fake and shoddy tourism products	3.423077	0.817356	40.69%
		Reasonable prices for tourism commodities	3.184255	0.784785	30.23%
		Diversity of recreational activities	3.563333	0.924196	51.32%

Table 3-13 Foreign tourist evaluation on shopping and entertainment

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Shopping and entertainment	Good service quality of employees at small shops around	3.484444	0.697302	45.80%
		Tourism product homogenization	3.68	0.647143	53.79%
		Fake and shoddy tourism products	3.705357	0.845532	54.20%
		Reasonable prices for tourism commodities	3.344828	0.954172	49.16%
		Diversity of recreational activities	4.056034	0.6765	73.53%

It can be seen from the above two tables (tables 3-12 and 3-13) that the average of domestic and foreign tourists' satisfaction with shopping and entertainment is around 3.5. Many tourists are less satisfied with the local shopping and entertainment service items. As the prices offered by the vendors in the tourism area are not transparent and changes with types of tourists, the domestic tourists are dissatisfied with the tourism product price and the satisfaction proportion in this regard only accounts for 30%. Most of the foreign tourists (73%) are satisfied with the local recreational activities. According to the interviews, foreign tourists love going to the bar and Yangshuo, a place with different types of bars, meets their needs.

3.3.3 Evaluation on Tourism Environment of Yangshuo

There are two evaluation indicators: human environment and natural environment. The human environment includes four indicators: local resident-friendliness, efficient handling of complaints, over-commercialized in the locality, and community in good public order. The natural environment includes three indicators: clean scenic environment, clean air and Low noise.

3.3.3.1 The Evaluation on Human Environment of Yangshuo is High

Table 3-14 Domestic tourist evaluation on human environment

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism environment evaluation	Human environment	Local resident-friendliness	3.746689	0.786473	63.40%
		Efficient handling of complaints	3.115174	0.622242	21.57%
		Over-commercialized in the locality	3.943522	0.835407	67.32%
		Community in good public order	3.589018	0.815813	55.07%

Table 3-15 Foreign tourist evaluation on human environment

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism environment evaluation	Human environment	Local resident-friendliness	4.017094	0.763655	71.85%
		Efficient handling of complaints	3.304147	0.712622	33.61%
		Over-commercialized in the locality	3.889831	0.983556	63.87%
		Community in good public order	3.781116	0.732056	60.92%

According to the above two tables (tables 3-14 and 3-15), the average of tourist satisfaction with local human environment is around 3.7. The evaluation on local resident-friendliness and community security is relatively high. According to the interviews, as the proportion of tourism complaints of Yangshuo is low, tourists who have no complaint about Yangshuo tend to remain

neutral. That's why the satisfaction with the efficient handling of complaints is so low, with the average of 3.

3.3.3.2 The Evaluation on Natural Environment of Yangshuo is Broadly Positive

Table 3-16 Domestic tourist evaluation on natural environment

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism environment evaluation	Natural environment	Clean scenic environment	3.705298	0.795262	63.24%
		Clean air	3.961921	0.802859	74.51%
		Low noise	3.325041	1.03703	44.61%

Table 3-17 Foreign tourist evaluation on natural environment

Main aspect		Indicator	Average	Variance	Satisfaction proportion
Tourism environment evaluation	Natural environment	Clean scenic environment	3.697479	1.232989	66.81%
		Clean air	3.923729	0.981392	75.63%
		Low noise	3.147679	1.567081	43.28%

According to the above two tables (tables 3-16 and 3-17), the evaluation of domestic and foreign tourists on scenic environment and air is broadly positive. But both domestic and foreign tourists think the noise is high in Yangshuo and the difference in satisfaction is large. According to the interviews, some tourists choose to live by the road near Ten miles Gallery and some choose to live by the mountains. That's the reason leading to large fluctuation of satisfaction.

3.3.4 The Overall Evaluation on Yangshuo is High and Basically Meets or Exceeds the Expectations.

Yangshuo receives a high overall evaluation from tourists at home and abroad. As the overall evaluation indicators in table 3-18 show, the proportion of satisfaction of foreign tourists

(87.90%) is higher than that of the domestic tourists (69.20%). Similar result can be found by measuring the tourist expectation of Yangshuo: the proportion of satisfaction of foreign tourists is 85.29% while the proportion of satisfaction of domestic tourists is 66.83%. As shown in figure 3-8, 32% of the domestic tourists think that their tour in Yangshuo is below expectation, while only 3% of the foreign tourists think so. It can be seen from the above that the overall evaluation on Yangshuo is high. In other words, most of tourists are satisfied with tour in Yangshuo.

Table 3-18 Comparison of overall evaluation between domestic and foreign tourists

Main aspect	Indicator	Average	Variance	Satisfaction proportion
Overall evaluation	Overall satisfaction of domestic tourists	3.780000	0.509115	69.20%
	Overall satisfaction of foreign tourists	4.129870	0.435234	87.90%

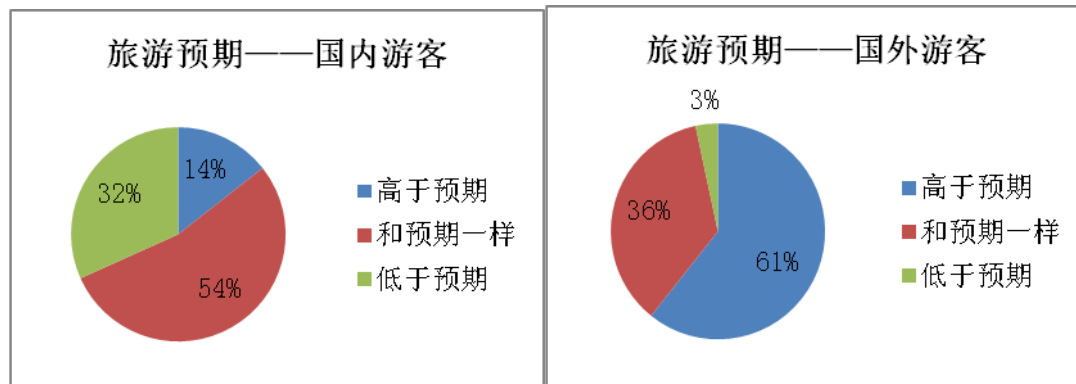
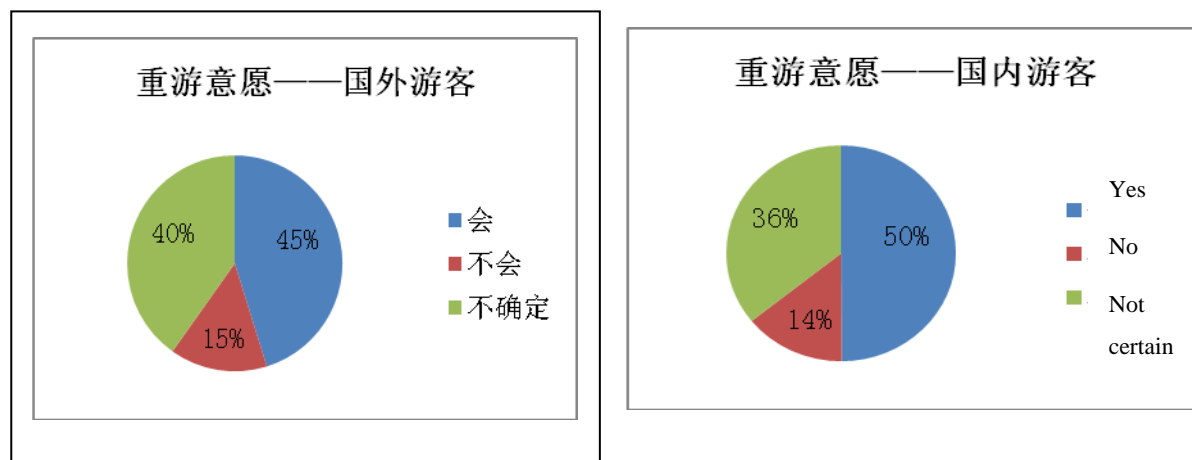


Figure 3-8 Expectation of domestic and foreign tourists

3.3.5 The Willingness to Recommend is Higher than the Willingness to Revisit

As shown in figure 3-9, half of tourists are willing to revisit Yangshuo. This is relevant to the tourist satisfaction. The higher the satisfaction is, the higher the willingness to revisit is. Tourist source is an influencing factor. According to the survey, most of tourists to Yangshuo are from Guangxi and Guangdong because it takes a shorter time for them to get there. For foreign

tourists, the recreational activities in Yangshuo meet their needs, so many of them are willing to revisit Yangshuo.



Willingness to revisit - Domestic tourists

Willingness to revisit - Foreign tourists

Figure 3-9 Willingness of domestic and foreign tourists to revisit

As shown in figure 3-10, 69% of the domestic tourists are willing to recommend Yangshuo to their relatives and friends and 91% of the foreign tourists are willing to do so. Although the proportions of both are high, more foreign tourists than domestic ones are willing to do so. This is relevant to the tourist expectation. According to figure 3-8, only 14% of the domestic tourists think Yangshuo is beyond their expectations, while the proportion of foreign tourists in this regard reaches 61%. Those who think Yangshuo is beyond their expectations tend to recommend it to their relatives and friends. That's why more foreign tourists are willing to recommend.

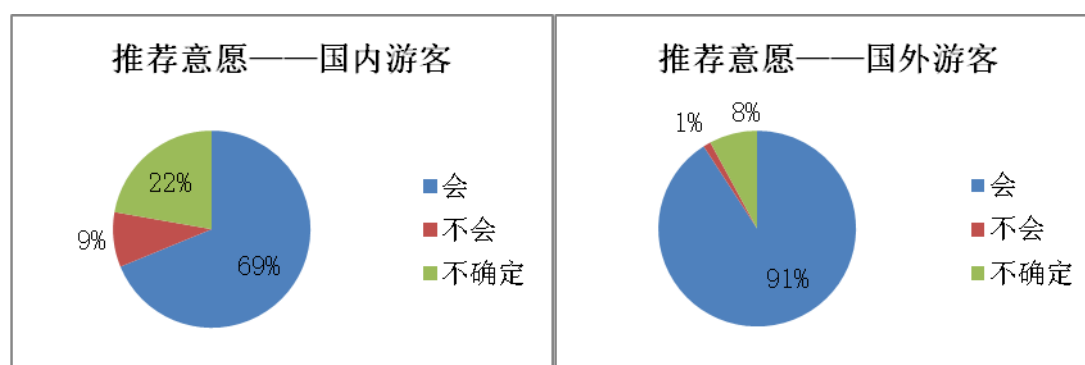


Figure 3-10 Willingness of domestic and foreign tourists to recommend

Compared with the monitoring result last year (62.98% in 2012), the satisfaction of domestic and foreign tourists grows by over 20%, and the willingness to recommend and revisit

is also increased to a certain extent. This indicates that the language barrier encountered by foreign tourists in Yangshuo is not as serious as before and the traffic sign recognition system is improved. However, the satisfaction of domestic tourists drops slightly.

3.4 Tourist Complaints are Handled Timely and Efficiently and Less Complaints are Found.

In the first half of 2013, 36 complaints and enquiries were received from tourists, of which 29 were valid within the limits of powers, with the settlement rate of 100%, saving 35340 Yuan of economic loss for tourists; 7 complaints were transferred to other department for handling. The service complaints as shown in table 3-19 involve bamboo rafting, fake and shoddy products, and forced consumption. The complaints about bamboo rafting include short rafting time (7), property loss (6) and body injury (1) due to the upset of bamboo raft, and poor service attitude (3). The complaints about fake and shoddy products include forced consumption (1) and refund for fake and shoddy products bought in the scenic spots (8) and stores (2). The number of complaints about poor hotel service, refund for ticket, anchoring of irregular boat, improper itinerary and cheating act by tour guide is few.

The number of complaints in the first half of 2013 is reduced by over 60% compared with that over the same periods of the previous years (from 1994 to the first half of 2012)

Table 3-19 Record of complaint calls provided by Yangshuo County Tourism Quality Supervision and Management Office in the first half of 2013

Subject of complaint	Quantity	Percentage
Rafting	15	41.7%
Fake and shoddy products	11	30.6%
Hotel service	4	11.1%
Scenic spot service	3	8.3%
Travel agency service	2	5.6%
Tour guide service	1	2.8%

3.5 Summary of the Chapter

In the survey, the tourist behavior and satisfaction of Yangshuo are monitored by means of questionnaires distribution, field observation and interview. It is found from the survey that most of tourists go to Yangshuo for sightseeing and wild adventure becomes an emerging activity for foreign tourists.

3.5.1 The Proportion of DIY Tourists is High and the Per Capita Consumption Needs Further Improvement

As DIY tour dominates the role in Yangshuo and some new ways to travel emerge, the domestic tourists have begun to detach themselves from mass tourism and seek other special tourism motivations, such as learning culture and enjoying food. The wild adventure, which is popular among foreign tourists, doesn't prevail in China. This is relevant to the Chinese preference. As the domestic tourists pay more attention to the culture of the destination, they concern more about the quality of travelling experience and cost performance. As a result, the product requirement becomes increasingly high and the length of stay and per capita consumption becomes shorter and lower. To make the tourists feel better, lengthen their duration of stay and stimulate per capita consumption, Yangshuo shall improve the service quality of tourism products and ensure the product uniqueness.

3.5.2 The Satisfaction with Local Resources is High While the Satisfaction with Resource Conservation is Low

The overall satisfaction with Yangshuo is above average and a great difference between domestic and foreign tourists exists in this aspect. Because the local staff values foreign tourists more than the domestic ones, the satisfaction of foreign tourists with Yangshuo is higher. The tourist evaluation on natural resources is generally high, but on local resource conservation, low. The evaluation on natural landscape maintenance, scenic environment and low noise is at the medium level. Although the air is fresh in Yangshuo, the noise is loud. Many foreign tourists don't think the water quality of Yulong River and Lijiang River is good.

3.5.3 The Satisfaction with Ticket Prices and Shopping is Low and both Services and Products Need Improvement

The domestic tourists are dissatisfied with the tourism services (with only 30% satisfied), particularly the ticket prices. For foreign tourists, the satisfaction with the same only accounts for 50%. As for shopping, except bars and other recreational activities, the tourist satisfaction with other tourism products is low, for the tourism products, souvenirs, crafts and specialities are monotonous. The fake and shoddy products and forced consumption are the issues which need to be noticed.

3.5.4 The Tourist Experience is Good and a Large Difference in Experience between Domestic and Foreign Tourists Exist

14% of the domestic tourists and 61% of the foreign tourists think that the experience is beyond their expectations; and 54% of the domestic tourists and 36% of the foreign tourists think that is exactly what they expect. These figures demonstrate that a majority of them are satisfied with their travelling experience and feel good about their tour in Yangshuo. At the same time, as the tourists at home and abroad have different preferences in experience items, the satisfaction proportion of foreign tourists is nearly 20% higher than that of the domestic ones. Regarding the willingness to revisit, the difference between domestic and foreign tourists is small. About half of them are willing to revisit Yangshuo. Of all respondents, 24% of them (for domestic and foreign tourists respectively) visit Yangshuo for the second time. The willingness to recommend is also high. Only less than 10% are not willing to do so. The number of complaints is reduced by a large margin this year. Generally speaking, the satisfaction of both domestic and foreign tourists is high. Particularly, the experience of foreign tourists is greatly improved.

Chapter IV Health and Safety

Health and safety is an important standard to measure the sustainable development of tourist destination. The monitoring over health and safety mainly relies on secondary sources in combination with questionnaires and interviews. The first-hand information is the main indicator based on tourist attention and perception. All of indicators, health includes food hygiene and environmental hygiene while safety includes tourist safety and local public safety.

4.1 Monitoring Indicators of Health and Safety

Table 4-1 Monitoring indicators of health and safety

Monitoring aspect	Main indicator
Health	Food hygiene
	Environmental hygiene
Safety	Medical safety and disease control
	Public safety
	Tourists' attention
Local security problems	Security problem
	Tourist perception

4.2 Health

4.2.1 Food Hygiene

To provide a safe dining environment for tourists, the relevant department of Yangshuo carried out a special inspection in the foodservice industry for many times for the purpose of protecting the effective interests of tourists. The inspection mainly directs at the restaurants in West Street, Ten Miles Gallery, and the area by Yulong River, Xingpin, Early Paradise and other scenic zones. By adhering to the regulation ideas of education, guidance, supervision and punishment, the inspectors educated and criticized those who had a low awareness of food safety and poor sense of responsibility, instructed those who had problems in obtaining catering service permit, managing the health of employees, conducting table-ware disinfection, disposing food

wastes and providing certificate and invoice of food to improve facilities and equipment and urge them to complete the improvement within limited term, and investigated and punished those who violated laws.

4.2.2 Environmental Hygiene

(1) Carry out daily and regular monitoring within the county in all round way. Public area, restaurants, farm houses, and hotels are the objects to be monitored. The monitoring involves the overall environment of the public area and the hygiene conditions of food material, processing and tableware of the restaurants; farm houses and hotels shall be monitored subject to the requirements of the food authority.

(2) Clearly define how to initiate and implement the public safety emergency plan

(3) Timely handle and report to the superior any major health incidents.

(4) Carry out a campaign to promote public health, and broadcast the points for attention to the residents and tourists in the county.

4.3 Safety

4.3.1 Medical Safety and Disease Control

In case of physical problem from the tourist, to prevent and control the infectious disease, a special investigation shall be made in the region where the disease is found. If that tourist is from the area where the infectious disease frequently occurs, he/she shall be timely isolated and disinfected. Proper disease control measures are required.

4.3.2 Public Safety

(1) June 2013 is the safe production month of Yangshuo. In view of this, the Yangshuo County government in Guilin, Guangxi, organized ten departments, including the county public security bureau, the industrial and commercial administration, the fire department and the administration of power supply, to carry out a campaign to promote the safe production month of 2013. The Yangshuo County fire department fully used this opportunity to strengthen the promotion and education of fire safety in all round way. By publishing the blackboard newspaper, providing consulting service, and distributing propaganda material, it teaches the masses the

“Knowledge of Enterprise Production Safety”, “Knowledge of Home Fire Safety” and the common sense of early fire suppression and evacuation. According to the statistics, the fire department distributed a total of 2000 leaflets on fire safety and received 50 questions from the masses, letting more people learn how to prevent fire and participate in maintaining fire safety.

(2) The relevant department conducted a law enforcement campaign concerning water safety in the Lijiang River section in Yangshuo to see if the cruise ships in Lijiang River are overloaded, carry passengers against law, and further protect the public order of Lijiang River and tourists’ life and property.

4.4 Tourist Perception

4.4.1 Tourists are Satisfied with the Hygienic Condition of Yangshuo

More than 50% of the domestic and foreign tourists remain neutral towards and recognize the safe and hygienic condition of food and accommodation in Yangshuo (see table 4-2). This indicates that the tourist evaluation on the environment of accommodation and restaurant is above average and both of them are relatively satisfied with the local hygienic condition, though there is still room for improvement.

4.4.2 The Satisfaction with Yangshuo’s Public Order is High

Most of tourists stay neutral towards and recognize the public order of Yangshuo, which indicates that both domestic and foreign tourists are satisfied with public order there. The foreign tourists have greater satisfaction than the domestic tourists. About 60% of them agree and strongly agree that the public order is good, while the domestic tourists only account for 42%. To most of the foreign tourists, Yangshuo is a friendly and safe tourist destination.

Table 4-2 Tourist evaluation on food hygiene, accommodation safety and hygiene and good public order

Item Evaluation	Food hygiene (%)		Accommodation safety and hygiene (%)		Good public order (%)	
	Domestic tourists	Foreign tourists	Domestic tourists	Foreign tourists	Domestic tourists	Foreign tourists
Strongly agree	6.79	18.19	11.01	24.79	10.82	20.66
Agree	20.50	40.08	21.92	46.69	31.95	39.26
Neutral	37.10	33.47	28.43	21.07	27.30	31.82
Disagree	9.43	4.55	7.55	2.89	4.40	3.72
Strongly disagree	2.77	1.65	1.89	1.24	2.14	0.86

4.4.3 The Attention Paid to Public Order and Hygiene is Low

Judging from the data analysis of The Most Desired Information about Yangshuo in the questionnaires issued to the tourists, domestic and foreign tourists pay insufficient attention to hygiene and public order. Compared with the monitoring last year, the attention paid by the foreign tourists to hygiene and public order is lower. In general, domestic tourists pay more attention than the foreign ones. This indicates that in tourism planning, the information about public order and hygiene attracts less attention from tourists than food, accommodation, transportation, and entertainment. The higher demand of the domestic tourists for information about public order and hygiene reflects that domestic tourists pay more attention to the public order and hygiene of Yangshuo.

Table 4-3 Attention of tourists to public order and hygiene

	Domestic tourist	Foreign tourist
Public order	18.6%	7.44%
Hygiene	14.3%	9.09%

4.5 Summary of the Chapter

At present, the health and safety of Yangshuo is good. Both domestic and foreign tourists pay certain attention to the information of health and safety and are relatively satisfied with the local hygiene condition of food and accommodation. To enhance the local environmental safety and cultivate a good and harmonious tourism atmosphere, the government and relevant department have implemented measures to regulate and improve the safety of food and public environment.

Chapter V Tourism Planning and Control

5.1 Monitoring Indicators of Tourism Planning and Control

In monitoring the sustainable tourism development of Yangshuo, there are three aspects to measure the tourism planning and control: tourism transportation planning and control, tourism resources planning and control and land use for tourism. The monitoring indicators of these three aspects are shown in table 5-1:

Table 5-1 Monitoring indicators of tourism planning and control

Main monitoring aspect	Monitoring indicator
Tourism transportation planning and control	Roadway standard
	Passenger station standard
	Means of transport (preference)
	Tourism service facilities and county land for transportation plan
Tourism resources planning and control	Development of core attraction elements
	Tourists flow rate control in the sightseeing spots
	Architectural landscape style and features control
	Land use control at the overall strategic level
Land use for tourism	Layout planning of tourism development space, and land use control
	Land use of main destination townships
	Land conversion and additional tourism land

5.2 Tourism Transportation Planning and Control

5.2.1 Significance of the Indicators for Transportation Planning and Control

In the aspect of tourism transportation planning and control, the monitoring indicators include roadway standard, passenger station standard, means of transport (preference), as well as tourism service facilities and county land for transportation plan. The roadway standard reflects the current carrying capacity of the transport means of Yangshuo; passenger station standard reflects the current handling capacity of the passenger flow; means of transport (preference) can provide a direction for the subsequent transport infrastructure planning scheme; and tourism service facilities and county land for transportation plan reflect the direction for current planning. Generally speaking, these indicators can comprehensively show the situation of transportation planning and control of Yangshuo County.

5.2.2 The Traffic Sign Recognition System Needs to be Strengthened Based on the Roadway Standard.

The road system in Yangshuo County consists of national highways, urban main roads, secondary mains roads, and by-passes and footpaths, of which the transit national highways, when serving as urban roads, are 42 meters under red line control, the main roads are 24-32 meters under red line control, urban secondary main road, 12-18 meters, urban by-passes, 7-9 meters, footpaths, 4-6 meters, and pedestrianized streets, 9 meters. As Yangshuo County has various types of roads, a higher standard is required for traffic signs. It is found from the feedback information of the questionnaires, 38% of the foreign tourists think the traffic signs of Yangshuo are clear and reasonable and 50% of tourists agree on that point, which indicates that Yangshuo County needs to further strengthen its setting of traffic signs based on the roadway standard.

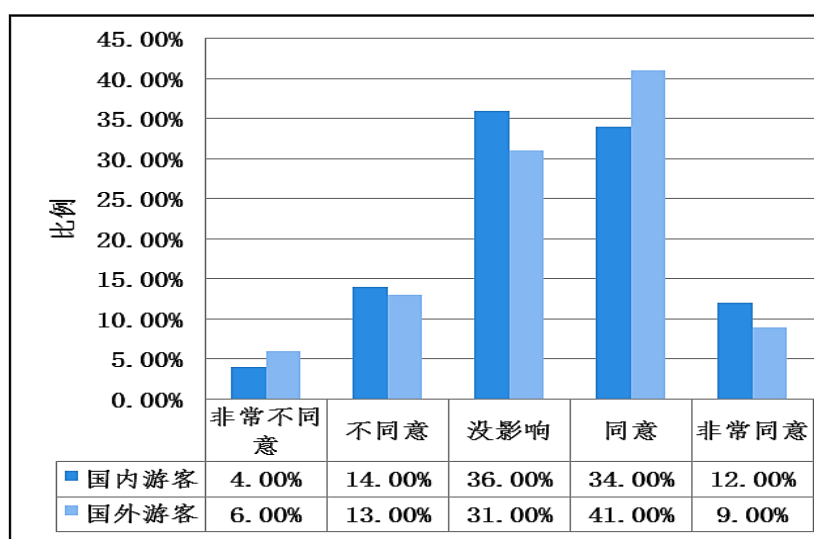


Figure 5-1 Tourist perception to the visibility of traffic sign recognition system

5.2.3 Passenger Station Basically Meets the Needs of Tourists.

Administratively, Yangshuo is a county-level city, thus, its passenger station shall be classified as a tertiary station, i.e. a station with the number of passengers dispatched of over 500 (including) (except those stations in the place of the county-level government which have been classified as primary and secondary stations; and stations in general tourist area). However, as Yangshuo is a developed tourist city, its actual passenger flow can't be measured by the standard adopted by the general cities at county level, and its carrying capacity is comparable to the cities at municipal level. For years, the tourism development has made Yangshuo passenger station become more mature in controlling passenger scale and number of runs. For example, Yangshuo passenger station can dispatch a coach to Guilin every 30 minutes, and runs of coaches to Guangzhou and other metropolises outside the province. It is clear in figure 5-2 that only 19% of the foreign tourists and 18% of the domestic tourists think the transportation in Yangshuo is inconvenient. The current passenger station in Yangshuo still can meet the needs of tourists.

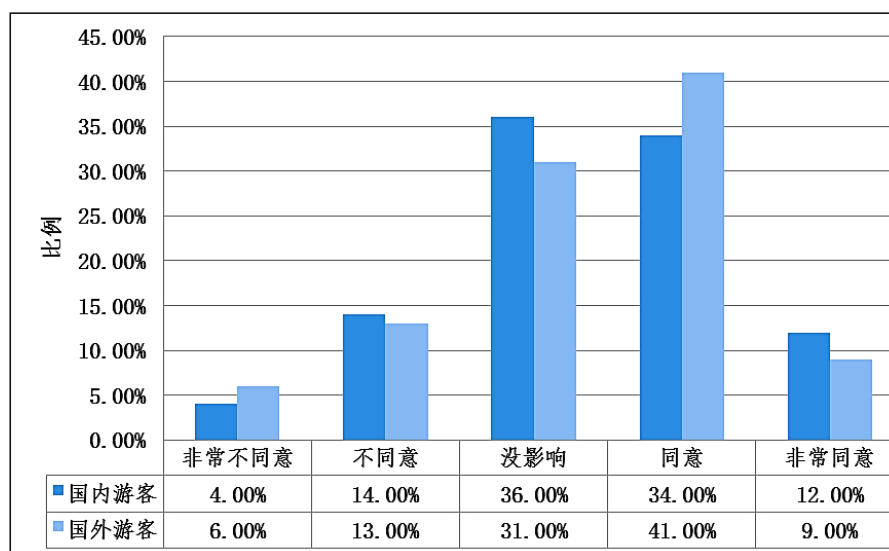


Figure 5-2 Tourist perception to convenient transportation

5.2.4 The Road and Traffic Construction shall Rely on the Means of Transportation Chosen by Tourists.

As shown in figure 5-3, 64% of the domestic tourists go to Yangshuo by long-distance bus, 28% by train, 11% by self-driving, and 13% by plane. For foreign tourists, 43% by long-distance bus, 34% plane and 19% by train. Some tourists are not directly from original place to destination. As they stayed elsewhere before going to Yangshuo, they took more than one transport means to get to Yangshuo. For example, some foreign tourists went to China by plane and ship and then to Yangshuo by long-distance bus or car. Compared with other transport means, long-distance bus is most popular among tourists to Yangshuo. So, in transportation planning, the improvement of road system is the top priority.

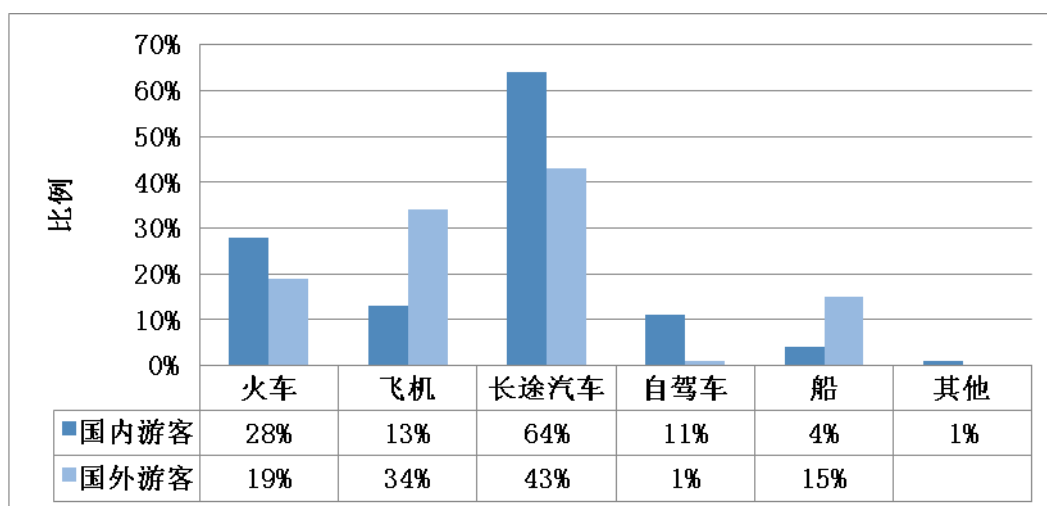


Figure 5-3 Choices of means of transport of tourists to Yangshuo

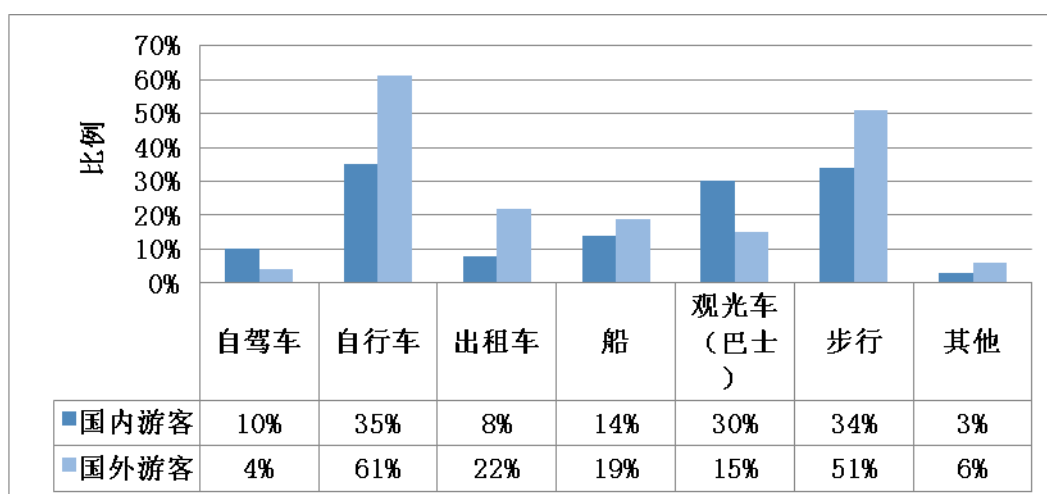


Figure 5-4 Choices of means of transport of tourists in Yangshuo

As shown in figure 5-4, 35% of the domestic tourists travel in Yangshuo by bike, 30% by sightseeing bus, and 30% on foot; for foreign tourists, 61% by bike, and 51% on foot. Currently, no bikeway is specially designed on the road of Yangshuo, and the sidewalk is crowded with peddlers. Given the tourist safety, it is a pressing need to build a green way for bikes and clean away the peddlers from the sidewalk.

5.2.5 Constant Improvement of Tourism Transportation System

In recent years, Yangshuo County proposed the development policy of “focus on the Southern area and improve the Northern area”, insisted on relying on the built-up area to seek sectional development and formed the space layout of “double group and multi-section”. In the 220.74-hectare land for tourism service facilities, the northern area, by renovating the

administrative land in the old town, is mainly for travel and leisure, commercial finance, science research and education and residence, while the southern area, by building holiday resorts, hotels, international cultural exchange center and recreation and rehabilitation center, is mainly for vacation, administration, culture and sport and residence. It can be found that although both southern and northern areas of Yangshuo County have focused on tourism development, their development directions are different, which is particularly apparent in tourism service facilities construction and road traffic.

In terms of road traffic of the Country, it not allowed to build any house along the river bank side of the electromobile lane from Low Mountain to Big Banyan, and if houses to be constructed at the opposite side, it is imperative to keep the house 200 meters away from the driveway. Construction projects crossing any village will be subject to specific management measures of the village concerned. To develop the northern area into a “tourism area” which combines tourism industry and other related industry (such finance), the administrative center, cultural center and living center are moved from north to south. In terms of the transport in the county, Yangshuo is planning to move the passenger station to Fengming District located in the north of the county, with an area of 3.97 hectares; establish a bus station in the east of the living area located in the south of the county, with an area of 3.76 hectares; set up 8 parking lots in the public center, commercial center, tourist holiday resort, commercial finance area and other transportation hub, with an area between 0.6 and 11.6 hectares; move the gas station to the north of Dacun district, with an area of 1.6 hectares; and build a gas station in the south of the county, with an area of 1 hectare.

5.3 Tourism Resources Planning and Control

5.3.1 Natural Tourism Resources are Still the Core

Yangshuo has abundant tourism resources. Reasonable planning and control of tourism resources are conducive to maintaining the rapid and steady development of local tourism. Monitoring the core tourism resources and landscape and understanding tourist perception to core tourism resources and landscape help to seize the key points of Yangshuo’s tourism development. As shown in figure 5-5, the natural scenery of Yangshuo is the most important core tourism resource that attracts domestic and foreign tourists. 68% of the domestic tourists agree the natural

scenery is the core attraction. 21% are attracted by the local folk customs and 22% are attracted by the leisure atmosphere; for foreign tourists, 94% are attracted by the natural scenery. Although, academically, folk customs, community residents, local architecture, and local tour guide of the destination may become the core attraction in tourism planning, less tourists to Yangshuo agree on that point. These figures indicate one thing: on one side, Yangshuo is a place with unique natural tourism resources and its resource development has been relatively mature, while on the other side, Yangshuo has no obvious cultural difference to tourists, thus, effort shall be made to further strengthen the cultural construction.

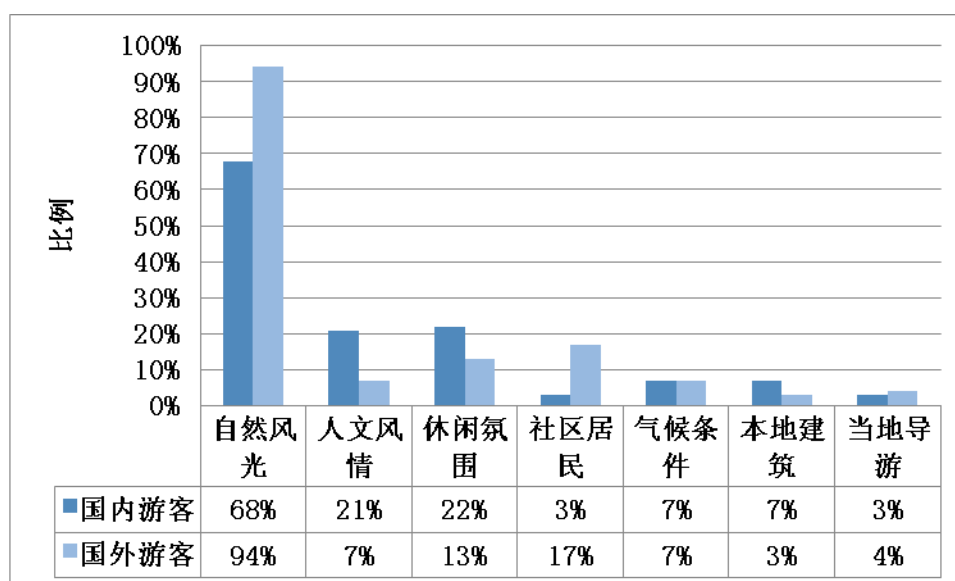


Figure 5-5 Core attraction to tourists

5.3.2 Tourist Diversion Starts to Achieve Initial Effect

The statistics and monitoring of tourist flow rate of different scenic spots help the tourism operators and managers better understand the tourism situation of Yangshuo and play an active role in promoting the development decision in the tourism industry and other related industry as well as preventing the dangerous incidents in travelling. The flow rate distribution to different spots of Yangshuo is uneven. Some core spots attract the vast majority of tourists. As shown in figure 5-6, according to the statistics, West Street, Lijiang River rafting, Yulong River and Scenery on the 20 Yuan Note are the core spots of tourism resources planning and control; 71% of the domestic tourists have been to West Street, the highest proportion of all other spots, 64% have been to Lijiang River, and over 30% have been to Big Banyan, Yulong River, Moon Hill and Scenery on the 20 Yuan Note. For foreign tourists, 84% have been to Lijiang River rafting, 70%,

West Street, and over 30%, Yulong River, Moon Hill and Scenery on the 20 Yuan Note. Judging from figure 5-7, the number of domestic tourists to the less famous spots, such as Butterfly Fountain, Ancient Totem Path, Jianshan Temple and Big Banyan, is higher than that of foreign ones, most of which are from tour groups. Because these spots are specially set for travel agencies, not many DIY tourists have been there. Foreign tourists mainly choose famous spots and less than 10% have been there. As the spots both domestic and foreign tourists choose are basically the same, it is very important to control the flow rate of those places.

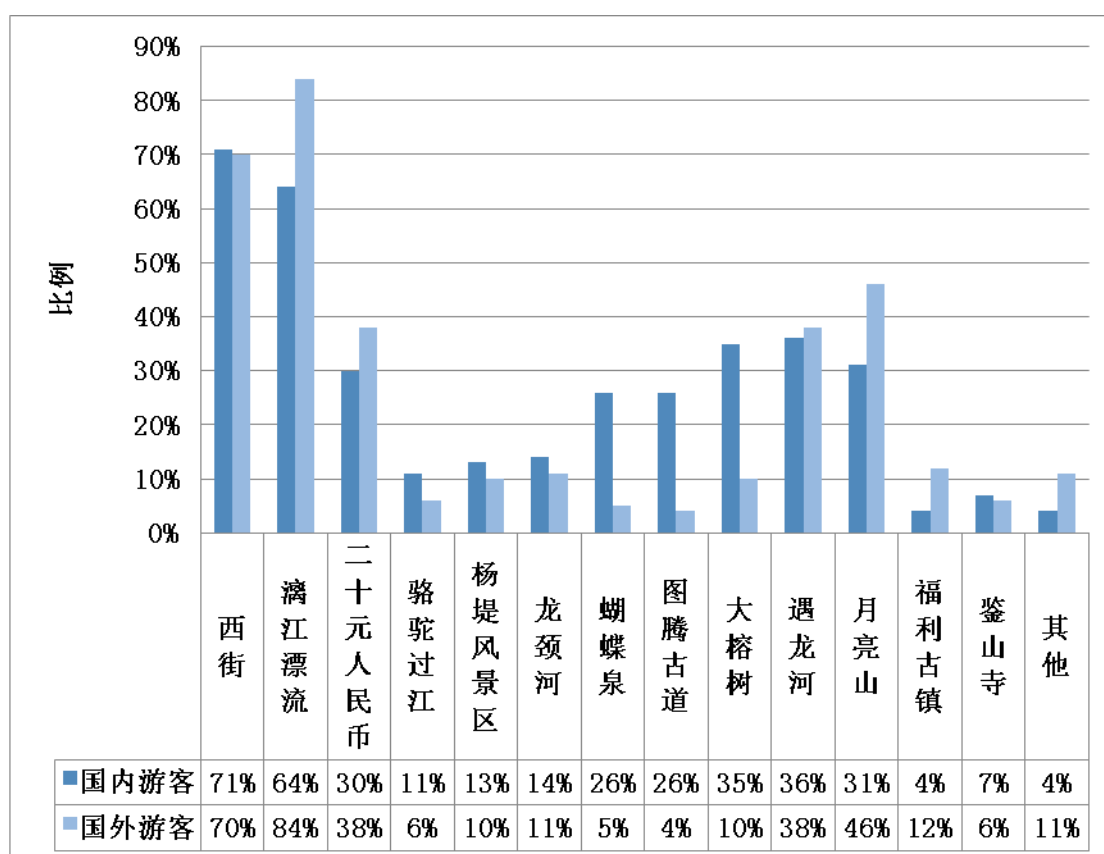


Figure 5-6 Scenic spots

5.3.3 Stringent Control over the County's Architectural Landscape

As for the protection of historical and cultural city, considering the core of the old city area as an important carrier of Yangshuo cultural connotation and characteristics, it should be done to strictly protect the overall urban style, make better use of the historic blocks, monuments ruins, former residence of famous figures and other historical and cultural resources, properly utilize various natural landscape and cultural landscape, remedy, restore and display original historical

and cultural perceivable elements, exploit urban historical and cultural connotation, and demonstrate the core style of Yangshuo as a national historical and cultural city.

(1) Seeking change while keeping paces together is advocated in the development of the urban area. The construction may be done in various styles depending on the natures of development on the basis that the feature of Guilin is highlighted, to create a unique urban area which combines administration, commerce and entertainment, living and industry.

(2) Architectural style and environmental design shall be taken into account in the development and construction of the urban area. On the premise that a harmonious scene is guaranteed, different heights of buildings should be well arranged in the urban area to avoid a group of buildings at the same height appearing in the one area.

(3) The urban area development shall reflect the correlation, continuity and times of Yangshuo's cultural characteristics, preserve the historical streets of Yangshuo, and restore the old as the old to reshow the city scale and history; efforts shall be done to preserve the houses representing different eras in the core of the old town and restore the style of the area without old houses. Creativity, planning layout, architectural design and landscape environment shall be taken into account in the development of the urban living area to embody the urban cultural connotation and form a cultural perception environment.

(4) The cultural connotation and facilities construction shall be strengthened. In planning, a certain amount of funds shall be prepared to develop the cultural connotation and construct the facilities in the residential area. The cultural connotation development includes: community name, creativity, architectural style, historical origin, etc; the facilities construction includes: place of cultural activity (outdoor activity space, library, and cultural activity space for the youth and the elderly), cultural decoration (bulletin board, sculpture and stone inscription), sport facility and arrangement of plants.

(5) In planning and design of other items, the corresponding cultural content shall be given according to the item characteristics.

5.4 Proper Increase of the Proportion of Tourism Land

The rapid development of tourism brings the locality with economic benefits and makes more and more pieces of land being converted for tourism purpose. But if too much land is converted for tourism purpose, it may destroy the local ecological environment and throw the local development out of balance. Given the scarcity of land, the land shall be used in strict compliance with the *Overall Planning for the Land use of Yangshuo County (2006-2020)* (hereinafter referred to as the Planning). According to the Planning, within the whole planning period, the land area for the farm residents is reduced by 307.81 hectares, of which 65.48 hectares of it is converted for tourism purpose; the tourism land is mainly used to build farmhouses and tourism villages. The farmhouses are mainly distributed in Yangshuo, Baisha, Fuli, Xingping, Putao, Gaotian and other rural town, and the tourism villiages include Longtan Village (Gaotian Town), Xingping Fishing Village (Xingping Town), and Old County Village (Baisha Town). The ways to use land include transfer, consolidation and comprehensive governance. The scenic, natural and cultural protection occupies the largest percentage (25.78%) of the land area in the land use allocation. The main purpose of land use is to protect the urban development and the construction of infrastructure and tourism service facilities.

Lands in different towns and villages have different use purposes and shall be allocated and used reasonably based on the characteristics and development directions of those towns and villages. Take Xingping and Gaotian as examples. Situated by Lijiang River, Xingping Town is not only the largest town in Yangshuo County, but also rich in tourism resources. It is the core of the tourism belt along Lijiang River with its scenic, natural and cultural protection occupying the largest land area (taking up an area of 13143.08 hectares, about 41.89% of the total area of Xingping Town). By focusing on the development of the ecotourism and adventure tourism, Xingping Town will gradually become a secondary central town and railway hub for Yangshuo tourism. Gaotian Town is the largest tourism handicraft production base of Yangshuo. Although there are some famous tourist attractions like Big Banyan, Moon Hill and Julong Lake, the protection and consolidation of arable land are the focal point of Gaotian in its land use. It shall provide enough lands for vegetables, plants and agricultural facilities and allocate land for

handicraft processing and tourism facilities reasonably. Table 5-2 shows the land use in tourism towns and villages in Yangshuo County (2006 - 2020)

Table 5-2 Land use in tourism towns and villages in Yangshuo County (2006 - 2020)

(Unit: hectare)

Land-use categories	Yangshuo Town	Baisha Town	Fuli Town	Xingping Town	Gaotian Town	Yangdi Town
The total land area	7528.95	15383.14	23285.21	31376.89	15492.93	10263.55
Forest area	1831.07	4667. 48	6344.59	10028.94	7984.56	5632.98
Urban construction land	860.1	121.27	116.23	49	50.06	0
	11.42%	0.79%	0.5%	0.16%	0.32%	0
Mining and independent construction land	71.15	160.07	110.98	133.4	134.88	30.56
	0.95%	1.04%	0.48%	0.43%	0.87%	0.3%
Rural residential land	139	402.99	498.75	375.94	392.92	125.35
	1.85%	2.62%	2.14%	1.2%	2.54%	1.22%
Land for scenic, natural and cultural protection	1940.64	2168.54	3899.89	12143.08	876.71	2397.79
	25.78%	14.1%	16.75%	41.89%	6.3%	23.36%
Others	411.84	811.73	4584.22	1179.71	545. 08	496. 98
	5.47%	5.28%	19.69%	3.76%	3.52%	4.74%

(Source: Land Resources Bureau of Yangshuo County)

5.5 Summary of the Chapter

Tourism resources planning and control are the integral part of the tourism development plan as well as the important means to maintain a sustained, steady and coordinative tourism development. Reasonable planning and control of tourism transportation resource, tourism core landscape resource and tourism land resource can develop the tourism rapidly and steadily. It is our efforts to find and solve any problems timely, provide suggestions for future development and protect the local overall development from tourism development imbalance.

5.5.1 The Planning and Construction for Tourism Transportation Need to be Strengthened

According to the monitoring findings, the relevant department shall pay more attention to the planning of Yangshuo tourism transportation. Tour coach is still the first choice for tourists, but as the number of self-driving tourists increases, so is the number of cars for self-driving tour, the road bearing capacity is further challenged.

5.5.2 The Tourist Demands Show a Preference for Natural Tourism Resources in Yangshuo

In terms of tourism resources, the tourist preference for core attractions and key scenic spots has a bearing on the tourism resources planning and control. Judging from the market response, tourists prefer natural scenery, such as the Lijing River, Yulong River, Moon Hill, Big Banyan and other natural scenic spots, which are the core tourism resources for the tourism development of Yangshuo. So, it is a need to strengthen the maintenance of natural landscape, preserve natural environment, protect the infrastructure for natural landscape, and regulate the operation of the natural scenic spots in an order way. The tourist flow rates of West Street, Lijiang River, Yulong River, Moon Hill and Big Banyan are high, so, they shall be well-arranged in the process of reasonable development.

5.5.3 It is a Need to Develop Rational Plans according to the Tourism Development of Yangshuo

In addition, the conversion of land function and the use of land are the basis of sustainable development planning for tourist destinations. The tourism planning and control of Yangshuo

must match with its actual situation while practical plans are formulated from the perspective of development. It is imperative to exercise strict control and requirements over the implementation of plans.

To lay a solid foundation for the tourism development of Yangshuo, it is required to take into account the tourism transportation, tourism resources endowment, land use and urban architectural landscape and style, draw on advantages and avoid disadvantages, control negative factors, and ensure the planning is scientific and rational, in the process of planning and control.

Chapter VI Economic Benefits of Tourism

6.1 Monitoring Indicators of Economic Benefits of Tourism

The following indicators to measure the impact of tourism on economy are selected by reference to the economic benefit indicator monitoring system of UNWTO and the actual situation of Yangshuo:

Table 6-1 Monitoring indicators of economic benefits of tourism

Monitoring aspect	Monitoring indicator
Tourism receipts	Tourism statistics (gross tourism receipts, number of tourists, number of beds, average length of stay, number of tourists staying overnight, etc.)
Contribution of tourism to Yangshuo's GDP and public finance	Percentage of tourism receipts to GDP
	Contribution of tourism receipts to tax revenue
Impacts of tourism on industry structure	Overall development trend of the tertiary industry driven by tourism (percentage of corporate ownership and foreign owners)
	Impacts of tourism development on Yangshuo's agricultural structure
Impacts of tourism on Yangshuo's handicraft and commercial development	Development trend of accommodation and catering services driven by tourism
	Development trend of handicrafts and characteristic agriculture driven by tourism
Impacts of tourism on Yangshuo's social employment	Resident training and skills improvement driven tourism (number of English training agencies in the county and the employee's English skill required by the enterprises)
	Resident training and skills improvement driven tourism (number of English training agencies in the county and the

	employee's English skill required by the enterprises)
	Resident training and skills improvement driven tourism (number of English training agencies in the county and the employee's English skill required by the enterprises)
	Impacts of tourism on employee's compensation and satisfaction
Impacts of tourism on Yangshuo investment	Data of County Investment Promotion Bureau and perception of employers to investment
Tourism seasonality	Tourism statistics (Occupancy rate, number of tourists per month)
	Low and peak seasons
	Impact of tourism seasonality on employment

6.2 The Development Conditions of the Tourism Industry Continue to Improve

As of September 29, 2012, the County had 7 A-rated scenic spots and more than 500 guesthouses, restaurants and hotels (1 five-star, 3 four-star and 2 three-star). More than 14000 beds have been registered and the number of beds for farmhouses and guesthouses exceeds 10000; there are 34 travel agencies and service outlets and over 160 bars and cafes; the county provides 126 cruise ships, big and small and more than 500 sightseeing buses and 20000 rental bikes; there are 727 rural tour guides and more than 80000 people directly or indirectly engage in tourism.

In the first half of 2013, Yangshuo received a total number of 4.523 million tourists, up 9.5% on a year-on-year basis, with the gross tourism receipts of 2.12 billion Yuan, up 18.5% on a year-on-year basis. Of all the tourists, 3.907 million are from China and 616,000 are from the places outside China. The number of inbound tourists staying overnight amounts to 221,000, the per capita consumption is 468 Yuan/person and the per capita length of stay is 1.37

Table 6-2 Statistics on Yangshuo Tourists (2010-June 2013)

Indicator \ Year	2010	2011	2012	January – June 2013
Total number of tourists (10,000 persons-times)	811.3	935.6	1050.3	452.3
Of which: foreign tourists (10,000 persons-times)	123.8	155.3	171.2	61.6
Accommodated person (10,000 persons-times)	279.2	315.8	-	-
Average length of stay (day)	1.38	-	-	1.37
Gross tourism receipts (100 million Yuan)	31.5	38.6	50.2	21.2
Tourist per capita consumption (Yuan/person)	388.3	412.6	-	468

(Source: Yangshuo County Tourism Bureau. “-” means no data)

It can be seen from table 6-2 that the number of tourists in Yangshuo County continues to increase. The gross tourism receipts in 2012 exceed 5 billion Yuan to reach a historical height 5.02 billion Yuan, which indicates that the tourism development of Yangshuo is on the rise.

The main expected goals of the economic and social development of 2013: regional total output value, up 12%; fiscal revenue, up 12%; social fixed asset investment, up 25%; total social retail sales, up 16%; number of tourists received, up 10%; gross tourism receipts, up 18%; urban per capita disposable income, up 13%; and rural per capita net income, up 15%.

6.3 Contribution of Tourism to Yangshuo’s GDP and Public Finance

6.3.1 The Contribution of Tourism to GDP Increases Year by Year

Despite the comparison between the added value of tourism receipts and GDP made by Tourism Satellite Account (TSA) for this indicator, it is difficult to calculate the value added of

the tourism receipts of Yangshuo County, so the proportion of tourism receipts in GDP takes the place.

Table 6-3 GDP and tourism receipts growth of Yangshuo from 2001 to the first half of 2013

Year	GDP (as per the pricing of the current year) (100 million)		Tourism industry (as per the pricing of the current year) (100 million)		Proportion of Tourism in GDP
	Gross	Growth rate	Total revenue	Growth rate	
2001	10.54	-	2.14	-	20.30%
2002	11.36	9.32%	2.41	12.62%	21.21%
2003	11.75	9.18%	2.44	1.24%	20.77%
2004	14.31	14.57%	4.06	66.39%	28.37%
2005	17.89	7.74%	5.51	36.21%	30.80%
2006	22.91	23.32%	9.64	74.85%	42.08%
2007	33.06	10.30%	12.77	32.47%	38.63%
2008	39.67	10.30%	17.90	40.17%	45.12%
2009	43.23	10.96%	24.20	35.20%	55.98%
2010	56.12	24.10%	31.50	30.17%	56.13%
2011	69.03	23.00%	38.60	22.54%	55.92%
2012	76.40	10.68%	50.20	30.05%	65.71%
The first half of 2013	-	-	21.2	15.85%	-

(Source: Government work report of Yangshuo County, Yangshuo County Tourism Bureau, "- " means no data)

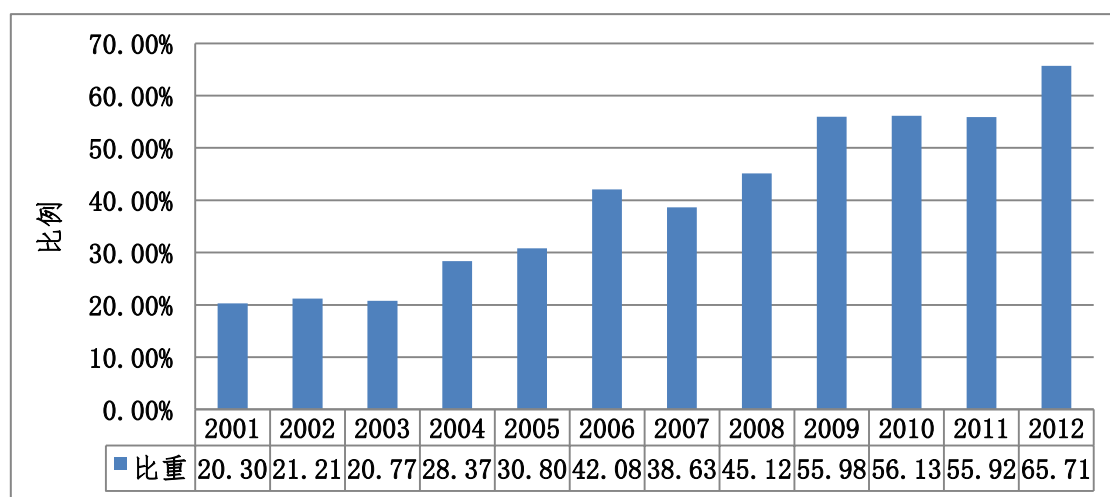


Figure 6-1 Proportion of tourism in GDP in Yangshuo County

It can be seen from table 6-3 and figure 6-1 that the contribution of tourism to Yangshuo's GDP is one the increase and reaches 65.71% in 2012. A clear picture of how the local residents see tourism is got by chatting with them: "If you ask me how we treat tourism, all I can tell you is that we all live on it." "Yangshuo is all about tourism." All these show that Yangshuo is closely connected to tourism.

6.3.2 The Contribution of Tourism to Finance Continues to Increase

The contribution of tourism to finance is reflected through the contribution of tourism to fiscal revenue. The tourism receipts are generated from all industries. Table 6-4 shows the tax payment of the scenic spots. The proportion of taxes from scenic spots in fiscal revenue is on the rise and exceeds 10% in 2012. The scenic spots are operated in good condition.

Table 6-4 Tax payment of the scenic spots of Yangshuo

Name of taxpayer	2010	2011	2012	The first half of 2013
Guilin Guangwei Wenhua Tourism Culture Industry Co., Ltd.	482239906.4	21711728.6	19896469.8	8814237.18
Yangshuo County Qianliyuan Tourism Culture Co., Ltd.	397107.25	588122.42	729407.75	356753.97
Guilin Butterfly Fountain	399926.9	672513.24	1429928.48	531145.06

Tourism Development Co., Ltd.				
Yangshuo County Longjing River Forest Ecotourism Co., Ltd.	196658.23	175660.2	189990.57	4266.03
Guilin Jiangshan Tourism Service Co., Ltd.	369254.77	558854.87	713937.84	366398.33
Yangshuo Landscape Tourism Development Co., Ltd.	1233821.44	1474299.34	1515477	695308.38
Yangshuo County Garden Management Institute	831190.56	1050999.71	712228.52	384690.89
Yangshuo County Niutouling Cultural Tourism Development Limited Liability Company	346449.25	485537.62	641070.7	115275.23
Yangshuo Suyuan Yulong River Rafting Co., Ltd.	2198184.17	5312969.58	6199196.49	932914.66
Yangshuo County Historical and Cultural Folk Custom Tourist Area Management Center	392764.17	5305045.93	2268249.06	347059.32
Yangshuo County Lijiang River Scenic Spot Management Co., Ltd.	\	\	3470714.03	1639372.62
Total	11,249,298.1 5	37,335,731.5 1	68,372,000. 28	14,187,421. 67
Fiscal revenue	450,000,000	555,000,000	600,000,00 0	-
Proportion of taxes from scenic spots in fiscal revenue	2.50%	6.73%	11.40%	-

(Source: Local taxation bureau of Yangshuo County, government work report of Yangshuo County, "-" means no data)

Tourism directly or indirectly affects the investments in Yangshuo and those investments are one of the most important parts in judging the tourism contribution to fiscal revenue, and play a driving force in industry development. The results of investment attraction in 2012 are significant with 18 domestic-funded projects implemented and 1.42 billion Yuan invested, up 31.2%; in the same year, 5 foreign-funded projects were implemented and 33.6 million USD were invested, up 41%. At the same time, a historical height was made by giving 410 million Yuan as the project subsidy fund under the budget of the central government and autonomous region. The balance of deposits of the financial institutions is up 16% to 6.86 billion Yuan; and the balance of loans is up 13.8% to 3.4 billion Yuan.

In the first half of 2013, 8 investment projects were implemented and 745.5 million Yuan of domestic funds from outer region were invested, with 50% of the annual tasks completed, up 3% on a year-on-year basis; at the same time, 15.5 million USD of foreign funds were invested, with 50.32% of tasks completed, up 5% on a year-on-year basis.

6.4 The Impact of Tourism Seasonality of Yangshuo is Weakened

According to the analysis of the questionnaires for employers, 31.4% of the employers regard July and 27.1% regard May as the start of peak season, and 47.1% think October is the end of peak season. It can be seen from this that the peak season of tourism in Yangshuo is about May to October. The number of tourists received and the gross tourism receipts also show the time of low and peak seasons. Driven by the summer holidays, in the first half of 2012, the total number of tourists is 4.409 million and the number of the whole year is 10.503 million; the gross tourism receipts in the first half of 2012 are 1.83 billion Yuan and of the whole year, 5.02 billion Yuan.

The tourism seasonality brings an impact on enterprise employment. Of 76 enterprises, except 35 which have no hired laborers, in the remaining enterprises, the average number of hired laborers is 6 in the peak season and 4 in the low season. It can be concluded from the standard deviation that the difference in the number of hired laborers between enterprises in the peak

season is higher. According to the field monitoring, many enterprises in West Street will hire “volunteers” during the summer holidays.

Generally speaking, no obvious boundary between low and peak seasons is found in Yangshuo.

6.5 Tourism Attracts More Investments

Yangshuo County is an important tourism county of Guilin city, which has attracted many investors during its tourism development. In recent years, more and more investments were driven by tourism, among which the construction of Yangshuo New Town is an example. Situated in the south of Yangshuo County, Yangshuo New Town is positioned as an international destination which combines leisure resort, beautiful natural scenery and unique folk-custom culture with Guibei characteristics. According to the overall planning, it is divided into six functional zones:

“Leisure resort”: Establish a tourist resort with local characteristics by the international hotel group;

“Tourism real estate and culture school”: Let the mid- and high-end tourism real estate development dominate the role and set up schools to offer training about foreign language, tourism, traditional Chinese culture, etc.

Tourism service: Provide food and entertainment around the water bay, and set up high-end hotels and related tourism supporting facilities in the surrounding area.¹

In the first half of 2013, Yangshuo County, with the domestic investment funds of 745.5 million Yuan from outer region, implemented 8 investment projects, and completed 50.32% of the annual tasks, up 3% on a year-on-year basis; at the same time, 15.5 million USD of foreign funds were invested, with 50.32% of the annual tasks completed, up 5% on a year-on-year basis. Two projects were added: First, “Hot spring valley” project. With the total investment of 800 million Yuan, this project mainly includes hot spring hotel, traditional Chinese medicine and health preservation; Second, electric vehicle project. With the total investment of 150 million Yuan, the project mainly includes the production of two-wheel and three-wheel electric vehicles.

1 Source: Yangshuo County Tourism Bureau, *Charming Yangshuo – Chinese Key Tourism County*

The current projects worth over 100 million Yuan under negotiation include Luxin Garden invested by Shandong Luxin Properties Co., Ltd. and “Seven-star hills”.

In addition to the tourism investments made by the government authorities of Yangshuo, many business owners in Yangshuo are optimistic about the tourism investment potential in Yangshuo. As shown in figure 6-2, the average rating of Yangshuo tourism investment from 76 owners in the questionnaires is 4 (1 stands for strongly disagree, 2, disagree, 3, neutral, 4, agree and 5, strongly agree), which shows that the business owners are optimistic about the tourism investment prospect in Yangshuo.

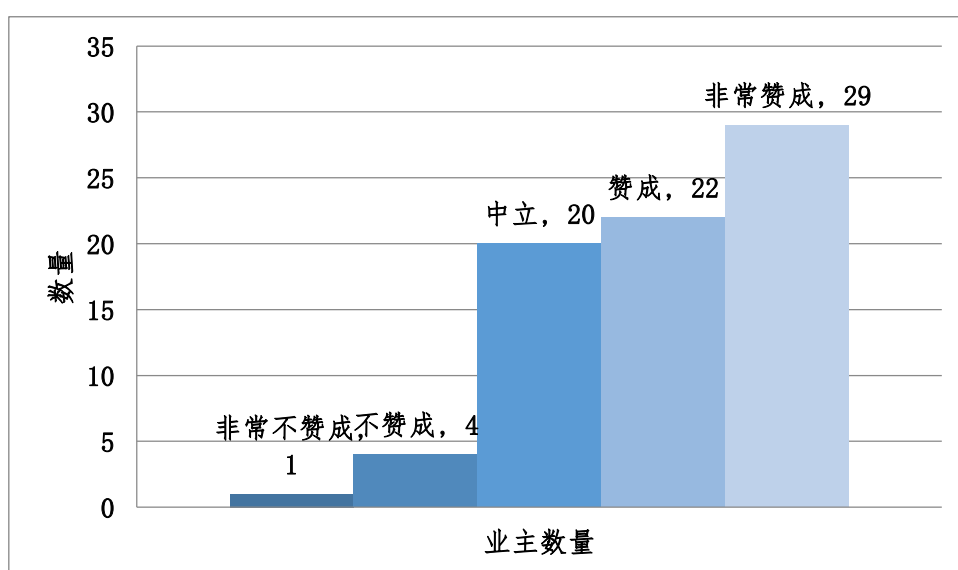


Figure 6-2 Degree of optimism of owners to the tourism investment in Yangshuo

6.6 Impacts of Tourism on Resident Employment

In the tourism development of Yangshuo, tourism enterprises offering job opportunities to the residents of Yangshuo are in cruise, accommodation, catering, travel consultation, and crafts manufacturing business. At the same time, on the basis of the positioning of tourism development of Yangshuo, the development of tourism the local residents to study and take training to upgrade their language skills and service capabilities so as to seize better employment opportunities. In addition, as the tourism flourishes, the competition between tourism enterprises increases and the employee satisfaction is affected.

6.6.1 Increase Employment Opportunities for Yangshuo Local Residents

According to the results of the resident questionnaires, residents agree to different extents that tourism development has brought more job opportunities. As shown in figure 6-3, the residents generally realize the active role of tourism played in local employment.

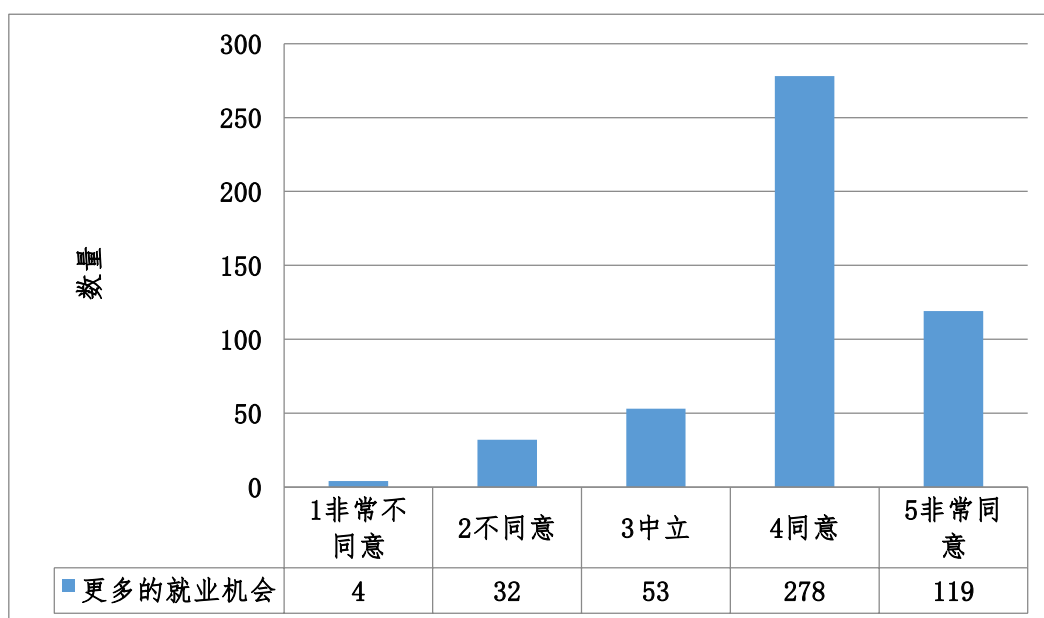


Figure 6-3 Tourism development has brought more job opportunities

According to the questionnaires for the employees of small tourism enterprises, 68.1% of them are from Yangshuo, 13.5%, Guilin (excluding Yangshuo County), 8.6%, other regions of Guangdong, and 9.8%, other domestic regions outside Guangdong. Of these employees, 53.9% think Yangshuo can offer adequate job opportunities to laborers. This reflects that Yangshuo tourism has attracted many outsiders to work there.

6.6.2 Promote the Development of Education and Training Industry and Improve Resident Employment

With the massive influx of foreign tourists, the English of many local residents is pretty good. In Yangshuo, the number of foreign tourists was more than that of domestic tourists in the first place. In the early stage of tourism development, the frequent contact between residents and foreign tourists offer a chance to residents to learn English and improve their capabilities to get a better job and improve the living standard. “Mama Moon” is a typical example. Mama Moon is a

native resident of Yangshuo. She learned English by leading the way for foreign tourists, and became a professional English tour guide. Besides getting a job, she also built her own brand – “Mama Moon” for her restaurant.

In addition, as an “international leisure resort town”, Yangshuo can also promote the flourishing growth of the local education and training organizations through its tourism development. At present, there are 13 foreign language schools in the county. Although the number of these education and training organizations is small, they can not only enable more local residents to learn English and improve their employment capabilities, but also attract more foreign tourists to learn foreign language, making contributions to the local tourism development.

In the questionnaires for employees, 39.4% of them have the habit of learning English everyday, while in the questionnaires for residents, 34.4% of them have the same habit. According to the questionnaires for owners, 29.3% of them state that most of the employees are able to communicate with foreign tourists and 26.8% state that English is a required skill of being employed.

6.7 Impacts of Tourism on Industry Structure

As shown in table 6-5, the shops in the county are classified into nine parts. The first seven parts have a direct bearing on the tourism industry. To further analyze the impacts on tourism industry structure, the analysis over the change of tourism industry structure is discussed in the following part.

6.7.1 Tourism Promotes Local Sales of Agricultural Products

Agriculture is the basic industry of Yangshuo, thus the development of tourism contributes to the adjustment of the structure of agricultural production. Before the tourism development, Yangshuo is a traditional agricultural county which mainly grew rice. The agricultural population was about 260,000 and the arable area was 17718 hectares. After the development of tourism, the agricultural industry structure was adjusted. The tertiary industry structure was optimized and adjusted from 36.5:20.8:42.7 in 2005 to 23.9:34.7:41.4² in 2010. The plantation structure was optimized and the local natural advantages were used to develop specialty agricultural products

² Government work report of Yangshuo County of 2011 http://www.ssfcn.com/detailed_gh.asp?id=26322&sid=1577

like kumquat. Baisha Town, Yangshuo, has been rated as the land of kumquat, and its Shatian pomelo is very popular.

In 2012, the economy of agricultural industry gradually took shape. The primary industry achieved the added value of 1.82 billion Yuan, an increase of 7%. With the newly planted kumquats of 31,700 mu, the total kumquat area of 158,000 mu, and the total output value of 1.35 billion Yuan, Yangshuo has become a kumquat product area with the best benefit and quality as well as the largest area in China. The quality and benefits of sugar orange (Shatangju), Shatian pomelo, black sugarcane, tea leaves, Chinese yam and other famous specialty agricultural products are further increased. Rapid progress is seen in cultivation of cattle, soft-shelled turtles in Lijing River, bees, and bamboo rats, of which the outputs of soft-shelled turtles and bees continue to dominate the country. More than 60 production bases for specialty agricultural products with scale advantage have been completed, with an area of over 200,000 mu. 5500 mu of seedlings were newly planted, with a total area of 40,000 mu and an output value of 265 million Yuan, making Yangshuo become the county with the fastest seedling growth and largest planting area in the city. ³ These agricultural products have been an integral part of Yangshuo tourism commodity. With the increase of tourists, the number of tourists who come to Yangshuo to buy some souvenirs for their relatives and friends rises accordingly. The local sales of agricultural products vigorously promote the agricultural development of Yangshuo.

At the same time, as the rural tourism develops, many agricultural product derivatives appear, such as farms by Yulong River, farmhouses, rape flower bases and strawberry bases. These derivatives near the tourist spots become a flourishing business, promoting Yangshuo's agricultural development.

6.7.2 Diversification of Handicraft Business Types

Among the shops in Yangshuo County, souvenir shops accounted for 8.82% of the total, mainly carrying handicrafts and specialty agricultural products. The Yangshuo-featured handicrafts include bamboo carvings, wood carvings, bamboo mat, calligraphies and paintings, painted fans, marble and talc products, landscape disk, stone products, ethnic embroidery,

³ Government work report of Yangshuo County (2013)
County http://www.gx.xinhuanet.com/dtzh/guilin/yangshuo/2013-04/18/c_115438001.htm

jewelry, colorful hydrangeas, T-shirt, antique ceramics, etc. The stalls, shops and outlets retailing handicrafts in the County are mainly lined along West Street, New West Street, Riverside Road, Pantao Road to which tourists resort, see figure 6-4. The development of handicraft business provides a good choice of employment for the residents and facilitates inheritance of local traditional handicraft techniques. With the increase of tourists, more and more tourists will buy some souvenirs to their relatives and friends, which will promote the production and sales of handicrafts and drive the development of handicraft manufacturing.

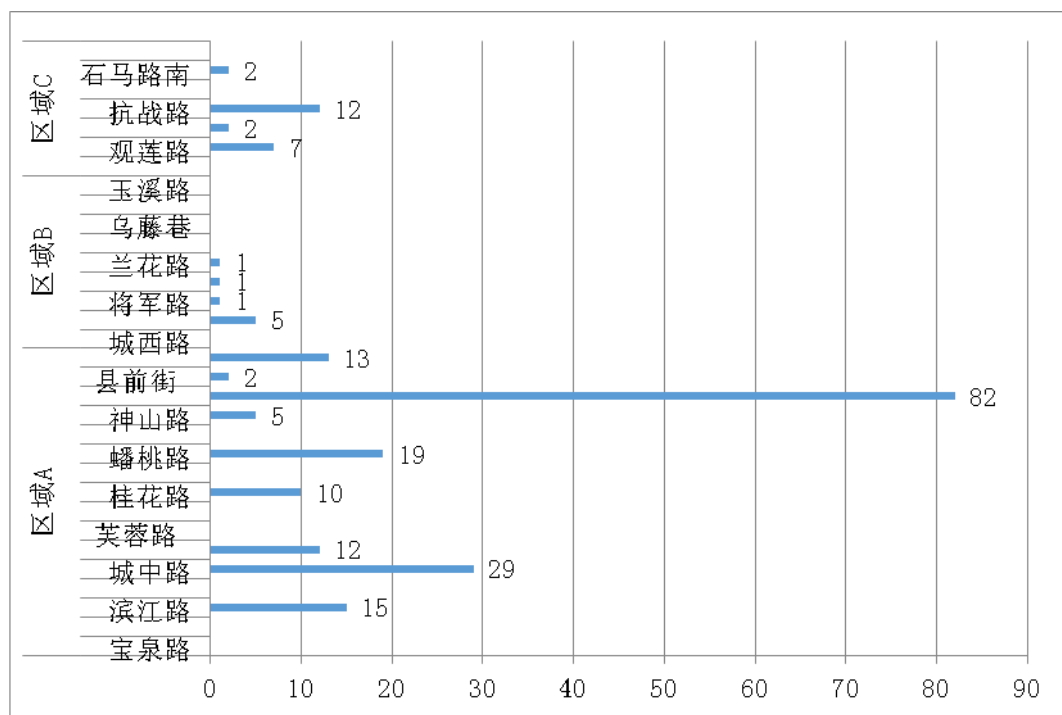


Figure 6-4 Distribution of streets selling souvenirs

6.8 Impacts of Tourism on Yangshuo's Commercial Development

6.8.1 Overall Impact Analysis: The proportion of Tourism Shops is Increased and the Competition among Small Enterprises is Intensified.

In general, Yangshuo tourism brings about the development of tourism-related business, which is reflected by the stable quantity of the shops in Yangshuo, the increase in the large proportion of tourism-related shops, and the intensification of the competitions among tourism enterprises.

The proportion of tourism shops in Yangshuo is increased. Table 6-5 shows the results of the survey carried out for 27 main business streets of Yangshuo (including West Street, New West Street, Diecui Road, Chengzhong Road, Chengbei Road, Furong Road, Baoquan Road, Guihua Road, Shenshan Road, Bilian Lane, Riverside Road, Lianfeng Road, Pantao Road, Xianqian Road, Chengxi Road, Jingfeng Road, Longyue Road, Jiangjun Road, Huashan Road, Lanhua Road, Kangzhan Road, Wujing Road, Jinshi Road, Mingfeng Road, Shima Road, and Guanlian Road). It is found by comparison with the data of 2011 that the quantity of the shops in Yangshuo in these two years changes little and is about 2400. The proportion of tourism-related shops in 2013 is 67.75%, accounting for two thirds of the total and increased by nearly 5% compared with 2011.

Table 6-5 Types of shops in Yangshuo County in 2013

Shop type	Quantity in 2013	Proportion in 2013	Quantity in 2011	Proportion in 2011
Hotel	357	14.45%	388	16.04%
Restaurant	386	15.62%	239	9.88%
Bar and western restaurant	93	3.76%	200	8.27%
Souvenir	218	8.82%	74	3.06%
Tourism services	76	3.08%	341	14.10%
Chinese health area	77	3.12%	66	2.73%
Foreign language school	13	0.53%	59	2.44%
Public service facilities	228	9.23%	426	17.61%
General merchandise	445	18.01%	295	12.20%
Casual wear	180	7.28%	16	0.66%
Others	391	15.82%	253	10.46%
Empty store	7	0.28%	62	2.56%
Total	2471	100.00%	2419	100.00%

The above table shows that tourism plays a dominant role in the commercial development of Yangshuo and positively promotes the shop development. The quantity stability of the shops in

Yangshuo in these two years also proves that Yangshuo's commercial development has become saturated and the positive impact of tourism on commerce is reflected by the penetration of tourism into the existing shops.

The increase of tourism shops also intensifies the competition among small tourism enterprises. According to the comparison between the number of shops in 2011 and the number of shops in 2012 as shown in figure 6-5, from 2011 to 2013, the number of tourism-related shops, such as hotel, bar and western restaurant, souvenir, tourism services and Chinese health care, is on the increase, however, the number of shops selling casual wear to local residents is on the decline. The number of empty shops also declines. This illustrates one point: with the rapid development of Yangshuo tourism, the constant increase in the number of tourism-related shops exacerbates the competition among tourism enterprises in the county, and at the same time, may force the shops selling products to the local residents to move to other place due to the rising rents.

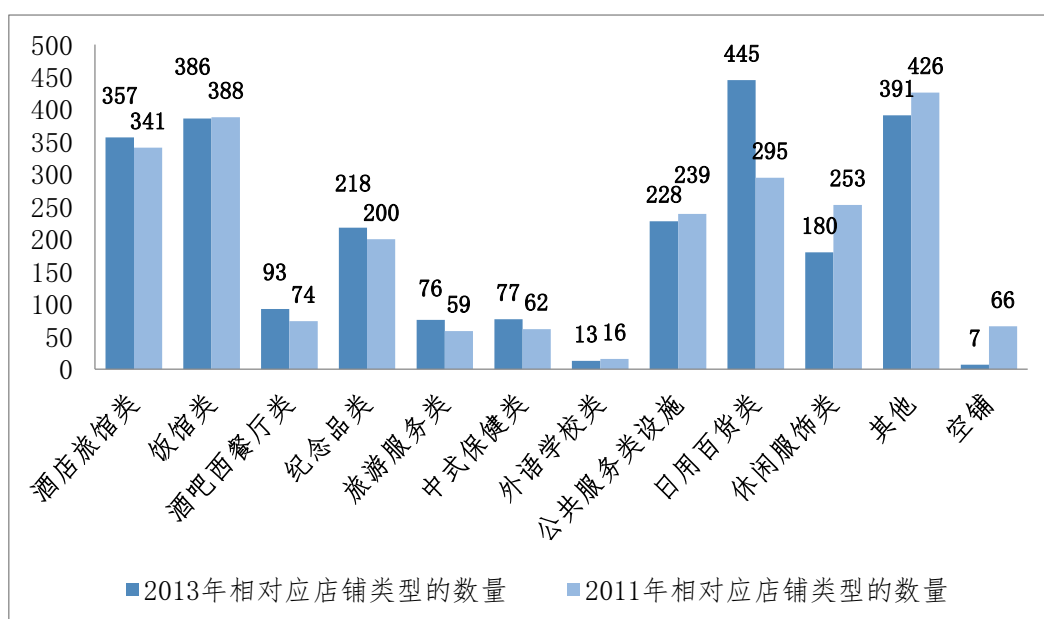


Figure 6-5 Comparison between the types of shops in 2011 and 2013 in Yangshuo County

6.8.2 Change of Commercial Form under Tourism Impact

6.8.2.1 Shop Use Function: from Serving Residents to Serving Tourists

Under the tourism impact, the use function of the shops in Yangshuo is generally changed from serving residents to serving tourists.

To better understand the change of use function of those shops, the use function is divided into three parts based on the group to which the products are sold, by reference to the impact of tourism on commerce proposed by the domestic scholars Bao Jigang and Su Xiaobo: Tourists, tourists and residents, residents. Figure 6-6 is prepared according to the statistical data of 2011 and 2013.

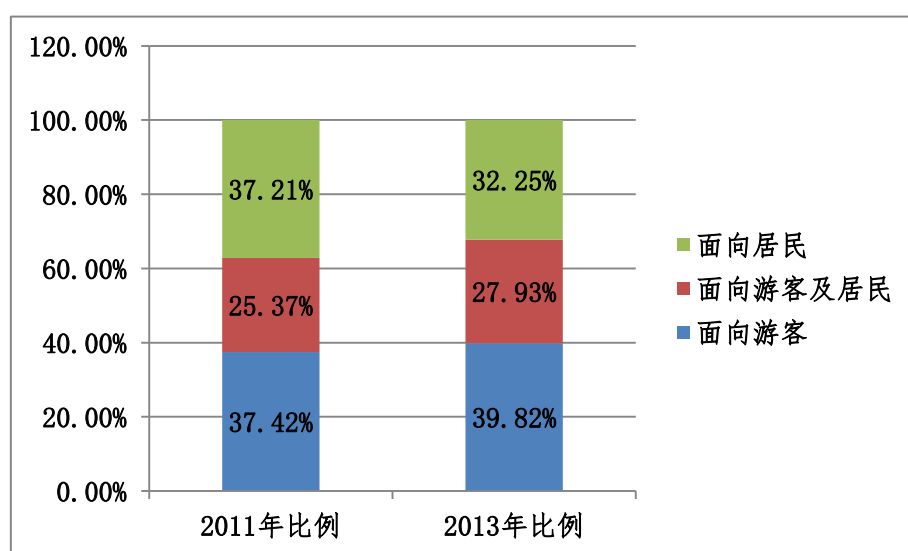


Figure 6-6 Comparison between shops of different use functions in 2011 and 2013

It is clear from figure 6-6 that the percentage of the shops serving tourists is increased from 37.42% in 2011 to 39.82% in 2013; of the shops serving tourists and residents is increased from 25.37% in 2011 to 27.93%; and of the shops serving residents is reduced by 5%. In other words, the number of the shops serving tourists is increased. The change from serving residents to serving tourists is attributed to the increasing impact of tourism of Yangshuo. As the impacts increases, the commercial consumption brought by the tourists is higher than the daily consumption brought by the residents. The shops originally serving residents gradually change their forms and resort to tourism for more commercial opportunities.

6.8.2.2. Business Types of the Shops: from Providing Food and Accommodation to Providing Entertainment

Generally speaking, the proportion of tourism-related shops is on the increase, and different business types of tourism shops show different changes.

In the survey, the tourism-related shops are classified into seven parts according to the business scope: Hotel, restaurant, bar, western restaurant, souvenir (handicraft, special custome, local speciality, etc.), and tourism consultation (e.g. travel agency and bike rental shop). Figure 6-7 is prepared in combination of the statistical data of 2011 to present the change of proportion of shop type.

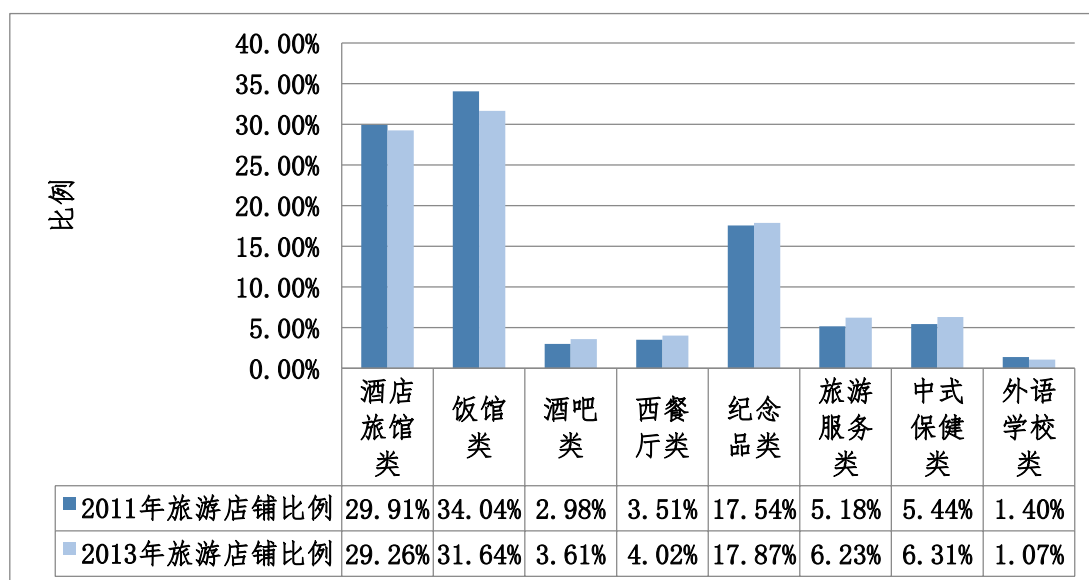


Figure 6-7 Comparison between the proportions of tourism shops in 2011 and 2013

It is clear from figure 6-7 that hotel, restaurant and souvenir dominate the role concerning the types of tourism shops in 2013, accounting for 78.77% of the total. However, compared with 2011, the proportions of hotel, restaurant, and foreign language school are reduced, while the proportions of the remaining four types are increased. This indicates that the types of tourism shops in Yangshuo change to certain extent from providing food and accommodation to providing entertainment, which is attributed to the rising rents of the shops in the main street. With the tourism development of Yangshuo, the rents of the shops in the tourism business street go up accordingly, forcing the hotels with limited profit space, particularly the guesthouses, to be

relocated in the remote alley. For example, many small guesthouses are densely distributed in the alleys around West Street.

6.8.2.3 Shop Location: the Proportion of the Shops in the Tourism Central Area Increases

In the survey, the business street is divided into three areas according to the crowding level of tourists: Area A, area B and area C. Area A, which includes 16 streets, such as West Street, New West Street, Baoquan Road, Bilian Lane, Riverside Road, Chengbei Road, Chengzhong Road, Furong Road, Fuqian Road, Guihua Road, Lianfeng Road, Pantao Road, Rongyin Road, Shenshan Road, and Xianqian Road, is the tourism central business district as well as the densely populated area. Area B, which includes 7 streets, such as Chengxi Road, Jiangjun Road, Jingfeng Road, Lanhua Road, Longyue Road, Teng Lane and Xiangshui Road, Wu, is the transition area between tourism area and residential area, and thus, has less tourists than area A. Area C, which includes 6 streets, such as Jingfeng Road, Guanlian Road, Jinshi Road, Kangzhan Road, Shima Road, and Wujing Road, is the residential area and has the least tourists

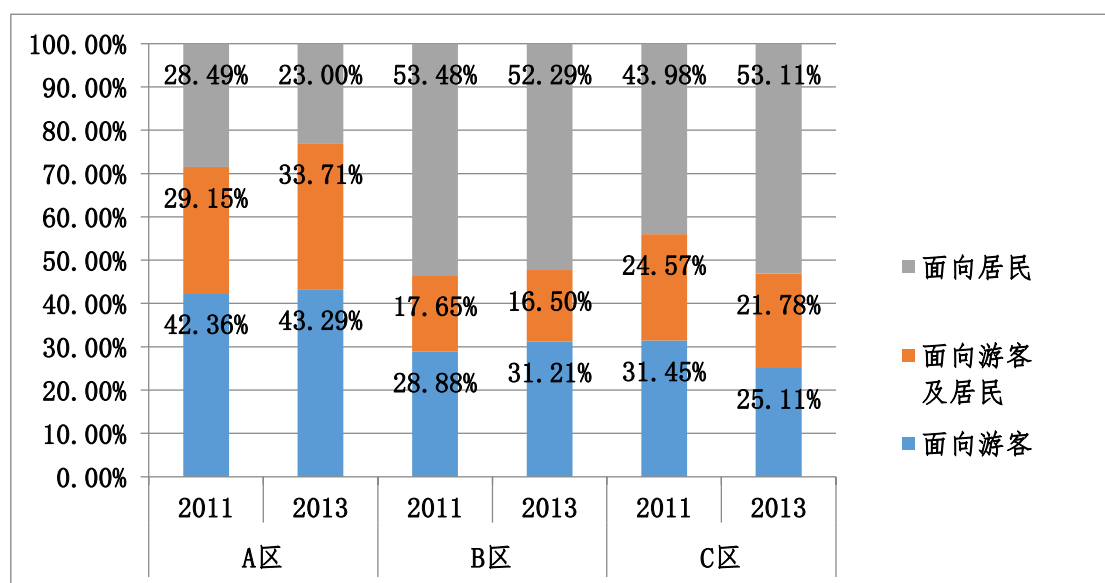


Figure 6-8 Comparison between the proportions of types of shops in all areas in 2011 and 2013

It is clear from figure 6-8 that the proportions of shops serving tourists as well as both tourists and residents in areas A and B in 2013 are increased compared with those of 2011, and the increase of area A is higher than that of area B. On the contrary, the proportions of shops serving tourists as well as both tourists and residents in area C are reduced, while the proportion

of shops serving residents is increased. The data indicates that the shops located in the tourism center and the places with large tourist flow tend to engage in tourism. Such change of business form is relative to the tour path as well the tourist activity area. It also indicates that tourists are still concentrated in area A, such as West Street and other main tourism streets, and the peripheral business area fails to attract more tourists.

6.8.3 Analysis on the Social Behaviors and Psychosocial Performances of Small Tourist Business Owners

76 valid questionnaires from business owners were collected in the monitoring. The major statistical indicators include business sense, local perception, energy-saving awareness and sustainable tourism development awareness of the owners.

6.8.3.1 Business Sense: 60% of Owners are not Satisfied with the Current Operating State and the Land Rent is the Biggest Obstacle

According to the sample statistics of Yangshuo owners, 65.79% of owners are not satisfied with their current operating state and only 6.57% are satisfied with it. This is relevant to the existing factors affecting the business operation in Yangshuo. According to the survey findings from several indicators like “rent”, “wage”, “product cost”, “other enterprise competition”, “tourist consumption ability”, “tax” and “policy” (see figure 6-9), rent, tourist consumption ability and other enterprise competition are the major factors affecting business operation, of which the high rent is deemed by the owners as the biggest obstacle hindering business operation. It is found from the interviews that the annual rents of the hotels near West Street exceed 100,000 Yuan, some of which even reach 300,000 Yuan. Many owners complain that it is hard to bear such a heavy rent. The existence of these factors lowers the operation stability of Yangshuo enterprises. Of all 76 respondents, only 39 (half of the total samples) have a business term of more than 3 years, while the business term of the rest is around 1 year. This instability increases the owner’s risk in setting up a shop. Enough attention shall be given to the problem of high rent, which will certainly influence the sound development of the business.

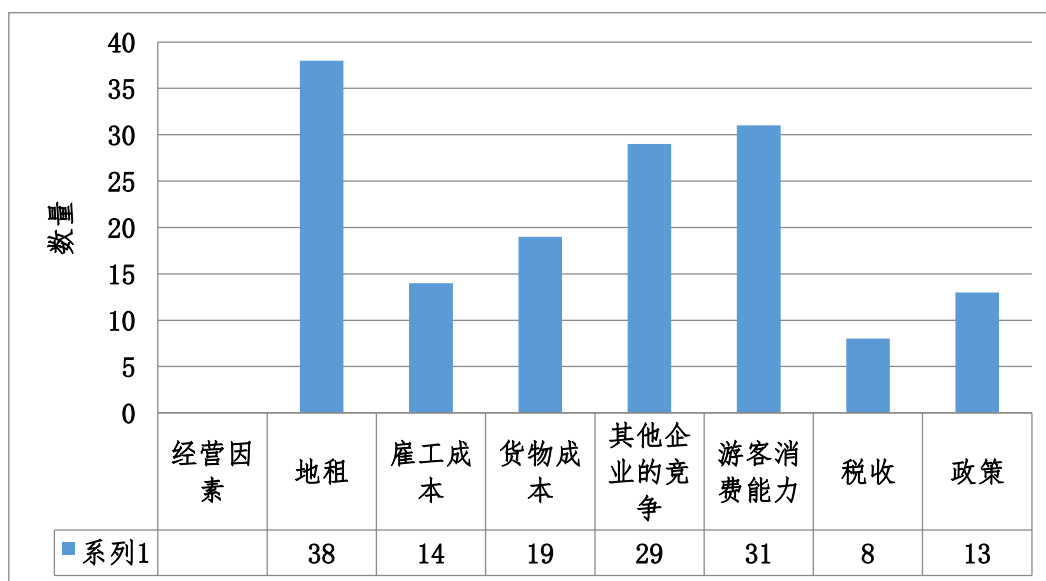


Figure 6-9 Factors deemed to affect the operating state by the owners

6.8.3.2 Environmental Perception: Most of the Owners are Satisfied with the Living and Investment Environment, but They Think West Street is Deeply Commercialized

Six indicators, including “safety”, “livability”, “worth the investment or not”, “leisure activity”, “West Street commercialization” and “West Street attraction”, are included in the questionnaires to evaluate the owner’s local perception. Statistically, the average satisfactions of “safety”, “livability”, “worth the investment or not”, and “leisure activity” are close to 4, and in particular, the satisfaction of “livability” reaches 4.29. This indicates the owners are generally satisfied with the living and investment environment of Yangshuo. In terms of the perception to West Street, the owners agree to certain extent that West Street is deeply commercialized (68.4% of owners think so) and less attractive to tourists.

6.8.3.3 Energy Saving: the Energy-saving Measures have not been Universally Implemented and the Awareness Thereof is Poor

Concerning the question “Do you implement the energy-saving measure”, according to the statistics of figure 6-10, only 38% of owners implement the energy-saving measure and more than 50% of the enterprises which implement such measure are guesthouses. This indicates that only a small number of enterprises implement the energy-saving measure in Yangshuo and the types of these enterprises are basically the same. Energy saving behavior has not been popularized.

Concerning the question “Will you implement the energy-saving measure”, more than 37% of owners say no, many of which “deem it unnecessary”, “care less about it” and “have no idea of it”. The energy-saving awareness needs to be further enhanced in Yangshuo.

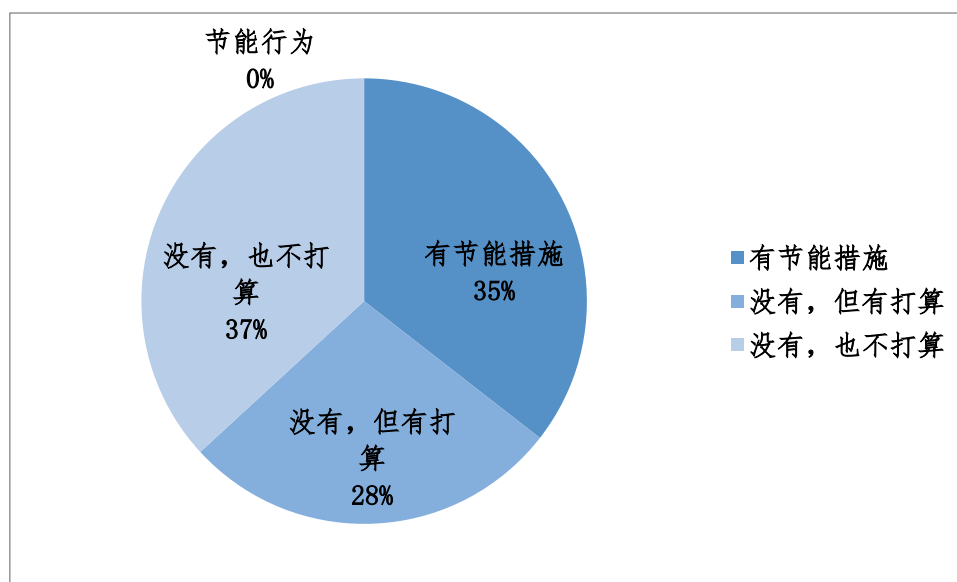


Figure 6-10 Owner's selection of energy-saving behavior

6.8.3.4 The Owner Perception to Sustainable Tourism Development is Inadequate

It is show in the results of questionnaires that the owner perception to sustainable tourism development is inadequate. Less than a quarter of owners are very familiar with this concept and this group of owners are not fully aware the sustainable tourism development. Generally speaking, the perception of owners to sustainable tourism development is inadequate.

The mass media and government are the major channels to deepen the understanding in the concept of sustainable tourism development. Particularly, the mass media plays an important role. To enhance the public perception to sustainable tourism development in the future, it is a need of the government and mass media to intensify propaganda.

6.8.4 Analysis on the Social Behaviors and Psychosocial Performances of Small Tourist Business Employees

Of 168 valid questionnaires from the employees in Yangshuo, 143 are engaged in tourism and 25 works in the tourism business area. So, the statistical results may be deemed as the survey results from the employees under tourism background.

6.8.4.1 Job Satisfaction: the Overall Satisfaction is High, but the Working Treatment Needs to be Improved.

According to the survey result, the average satisfaction of employees with the current job is 3.85, which is higher than the neutral level (3) and close to the satisfaction level (4). It is appropriate to say that the employees in Yangshuo are generally satisfied with their current jobs.

However, the survey result shows that the employees are less satisfied with the working treatment. In the monitoring, 11 indicators, including “wage”, “bonus”, “holidays”, “promotion”, “comment form the superior”, “support from the superior”, “colleague collaboration”, “colleague exchange”, “family support”, “comfort” and “scenic environment”, are included in the questionnaire to measure the employee satisfaction with his/her job. These 11 indicators can be classified into 3 impact dimensions: working treatment, interpersonal relationship and work environment. According to the statistics shown in table 6-6, the employees are satisfied with the interpersonal relationship and work environment, the average satisfactions of which are close to 4; however, they hold a general attitude towards the working treatment, the average satisfaction of which is neutral.

Table 6-6 Average satisfactions of employees with each indicator

Impact dimension	Monitoring indicator	Average satisfaction	
Working treatment	Wage	3.3	3.19
	Bonus	3.15	
	Holidays	3.2	
	Promotion	3.12	
Interpersonal relationship	Comment form the superior	3.66	3.9
	Support from the superior	3.82	
	Colleague collaboration	3.93	
	Colleague exchange	4.07	
	Family support	4.05	
Work environment	Comfort	3.79	3.95
	Scenic environment	4.1	

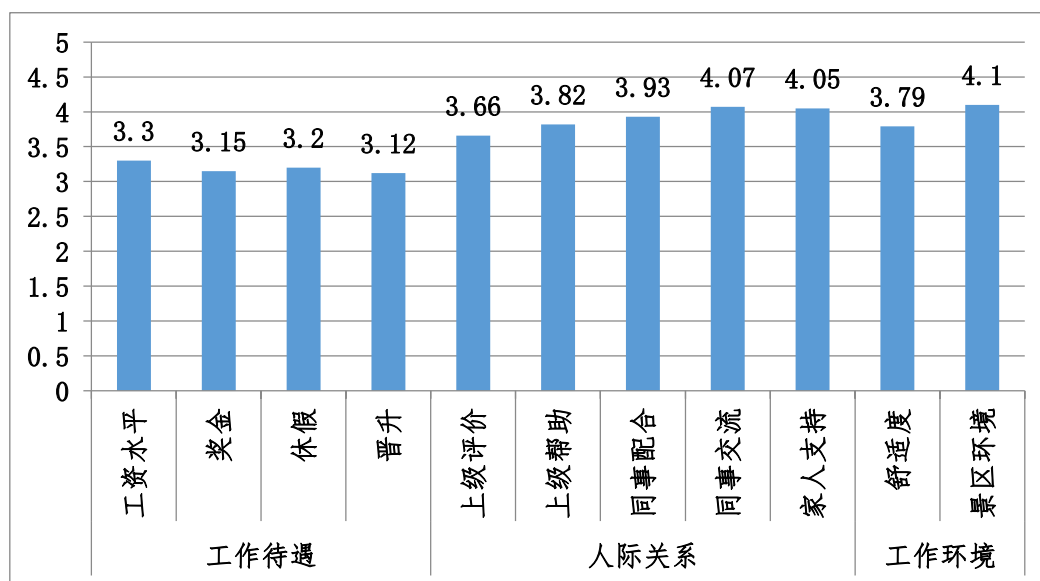


Figure 6-11 Average satisfactions of employees with each indicator

It can be seen from figure 6-11 that the satisfactions with wage, bonus, holidays and promotion are low. According to the survey result, the wage of employees engaging in tourism in Yangshuo ranges between 1001 and 2000 Yuan (figure 6-12). These fit the characteristics of tourism enterprise: low wage, less holidays in the peak season and tight pyramid business structure. The low satisfaction with promotion is relevant to the great number of small enterprises in Yangshuo as well as the lack of promotion space.

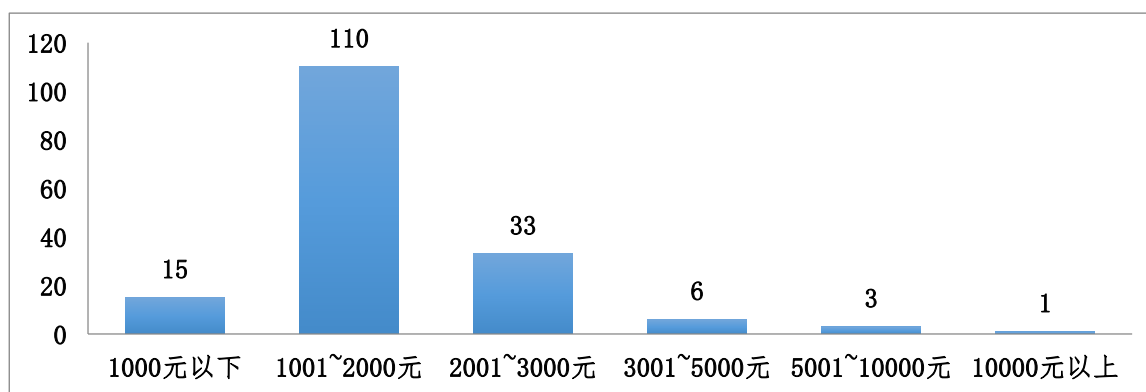


Figure 6-12 Employee's monthly income

In general, the satisfaction of employees with job is high. In terms of interpersonal relationship, the satisfaction of employees with colleague exchange is the highest, which is attributed to the high requirement of exchange and cooperation in offering tourism services. In terms of work environment, many employees agree that the scenic environment is beautiful, which indicates that better maintenance of scenic environment during tourism development will improve employee satisfaction. More attentions shall be given to the working treatment and relevant improvement measures shall be taken.

6.8.4.2 Occupational Choice: Priority is Given to the Pursuit of Life Style and the Willingness to Change Job is High

The indicators to evaluate the employee's attitude and behavior of occupation choice are "reason to choose the job", "obtain more suitable employment opportunities or not", "how to get the job" and "change the job or not".

Statistically, in terms of "reason to choose the job" and motive to get the job, 45% of employees think they like Yangshuo's comfortable environment and pursue a lifestyle (see figure 6-13), which fit the survey result that the satisfaction of employees with the work environment is the highest. However, the mobility of those who are willing to accept low wage for pursuit of a life style is high. According to the survey data, 44% of employees are willing to change their jobs, and most of them are planning to make a change within one or two years. This is not good for improving the overall service level of Yangshuo tourism. It also indicates that tourism not only creates jobs in Yangshuo, but also increases the employee mobility as well as the social employment instability.

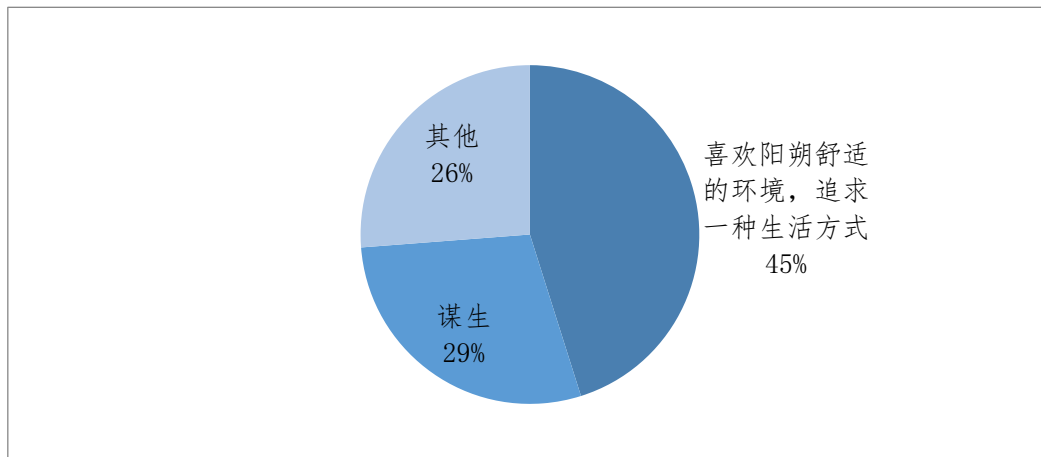


Figure 6-13 Reason to choose a job in Yangshuo

In terms of employment opportunity, 46.37% of employees think that the employment opportunities in Yangshuo are limited and 98.79% get the job on their own or by relatives and friends. The government and community provide little help in this regard. So, the government and the public service organizations shall expand the channel to provide more employment information to create more jobs.

6.8.4.3 Learning Behavior: Tourism Improves the Employee'S Foreign Language Learning Ability

The employee's foreign language acquisition behavior is reflected through two indicators in the questionnaire: "English proficiency" and "English learning frequency". According to the statistics shown in figure 6-14, the English acquisition ability of employees in Yangshuo is relatively strong. 35.21% of them know English and 40% of them have the English learning habit, the percentages of which are apparently higher than those of the small business employees in other towns. This indicates that Yangshuo tourism have strengthened the employee's desire to learn English and improved the English level of all employees.

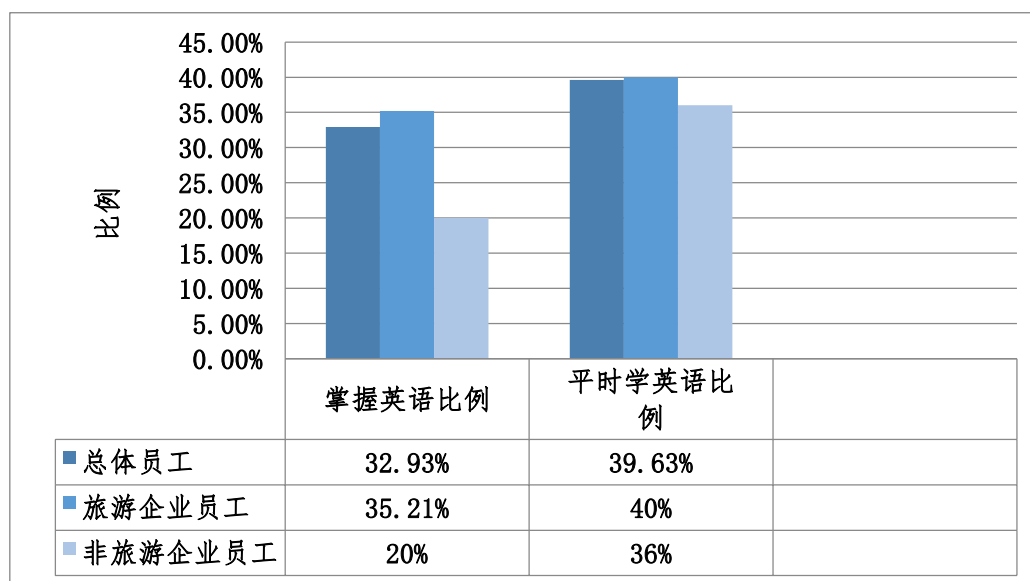


Figure 6-14 Comparison of employees of English acquisition in different enterprises

To facilitate further analysis, the employees are divided into two parts according to the business nature: Tourism-related employees and non-tourism-related employees. It is found that 35.21% of the tourism-related employees know English and 40% have the English learning habit, while the percentages of the non-tourism-related employees account for 20% and 36% respectively. This shows that the English proficiency of tourism-related employees is better than that of the non-tourism-related employees. As foreign tourists make up a considerable proportion in Yangshuo, many tourism enterprises require their employees have high level of English. At the same time, tourism plays a key role in promoting the enterprise employees to learn English. As the employees engaging in tourism are more aware of the importance of English, they cultivate a habit of English learning. Generally speaking, tourism improves employee's ability to learn English.

6.9 Summary of the Chapter

6.9.1 Tourism has Vigorously Promoted the Overall Economic Development of Yangshuo

Tourism plays an extremely important role in the economic development of Yangshuo and has proactively promoted the overall development of Yangshuo's social economy. It greatly generates the economic income, increases the financial contribution year by year, drives the development of agriculture, commerce, handicraft and other related industries, creates more

employment training and opportunities to the local residents and promotes the local investment attraction.

6.9.2 Tourism Plays an Obvious Role in Driving Investment

With the tourism development, the emergence of the large demand of tourism consumption attracts more investors to invest in Yangshuo, increases foreign investment and promotes the construction of high-end leisure tourism facilities. In the first half of 2013, Yangshuo implemented 8 tourism investment projects with the total investment amount of 761 million Yuan, which shows the importance of tourism in investment promotion.

6.9.3 Tourism Plays a Prominent Role in the Industrial Restructuring of Yangshuo

The tourism development of Yangshuo has promoted the sales of local agricultural products as well as the inheritance and development of the traditional handicraft industry; tourism shops, scenic spots and tourism enterprises has created more job opportunities for local people. So, tourism can, to some extent, not only guarantee the benign development of the primary industry, but also accelerate the transfer of labor force from the primary industry to the tertiary industry, playing an important role in Yangshuo's industrial restructuring. In terms of industry, the role of tourism played in commerce promotion is particularly prominent. The number of tourism-related shops is on the rise.

6.9.4 Tourism Plays a Prominent Role in Promoting the Commercial Development of Yangshuo

In terms of industry, the role of tourism played in commerce promotion is particularly prominent. The number of tourism-related shops in 2013 is increased compared with 2011, accounting for nearly 70% of the total shops; the number of shops offering tourism information service, Chinese health care, and other leisure tourism service, and bars goes up significantly.

Chapter VII Tourism and Resources Environmental Protection

Protection

7.1 Monitoring Indicators of Tourism and Resources Environmental Protection

Table 7-1 Monitoring indicators of tourism and resources environmental protection

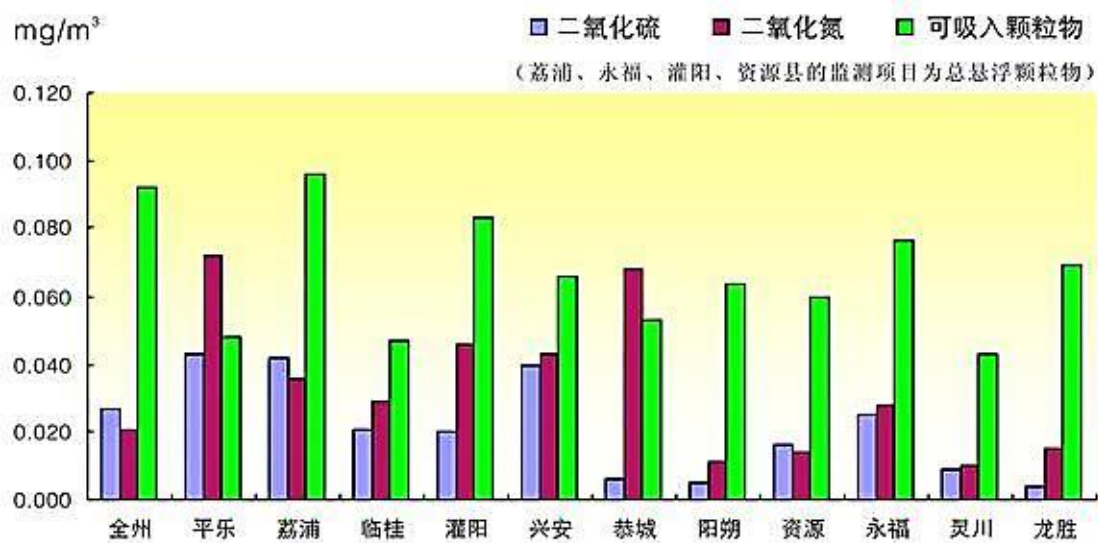
Main monitoring aspect	Monitoring indicator
Atmospheric environment	Air quality and conformance to standard
	Perceptual evaluation of residents and tourists
Utilization of water resource and conservation of aquatic environment	Utilization and protection of water resource
	Perceptual evaluation of residents and tourists
Noisy environment	Noise control
	Perceptual evaluation of residents and tourists
Solid waste	Solid waste disposal
	Perceptual evaluation of residents and tourists
Landscape and visual impacts of tourism	Whether there is landscape and visual improvement and control in support of tourism development
	Perceptual evaluation of residents and tourists
Energy management	Percentage of enterprises taking energy conservation measures and types of such

	measures
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7.2 Atmospheric Environment

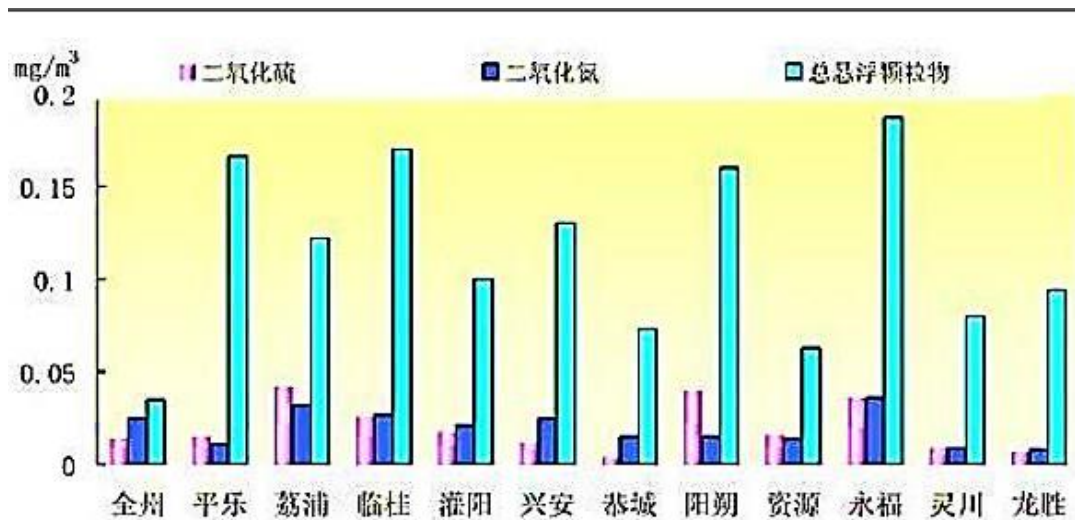
7.2.1 The Air Quality is Obviously Improved

It can be seen from the overall air quality of Yangshuo in 2011 and 2012 that Yangshuo effectively reduced its pollutant discharge in 2012 by developing cyclic economy, actively promoting clean product, adjusting industrial and energy structures, and closing the enterprises causing heavy pollutions. According to the *Environment Bulletin of Guilin City 2012*, the average annual values of sulfur dioxide, nitrogen dioxide, and total suspended particulates contained in the ambient air of Yangshuo County in 2012 meet the national secondary city standard. The contents of sulfur dioxide and inhalable particles in the ambient air of Yangshuo County in 2012 drop obviously, which greatly improves the air quality. No obvious improvement in the content of nitrogen dioxide is seen.



(Source: *Environment Bulletin of Guilin City 2012*)

Figure 7-1 Air quality environment of all counties in Guilin City in 2012



(Source: *Environment Bulletin of Guilin City 2011*)

Figure 7-2 Air quality environment of all counties in Guilin City in 2011

7.2.2 Perception: the Resident Perception is Poor while the Tourist Perception is Good

The resident perception to Yangshuo's air pollution caused by tourism is shown in figure 7-3. Of all respondent residents, 36% and 12% of them agree and strongly agree that tourism has aggregated air pollution; 19% and 8% disagree and strongly disagree on that point; and 25% think that tourism has no bearing on air pollution.

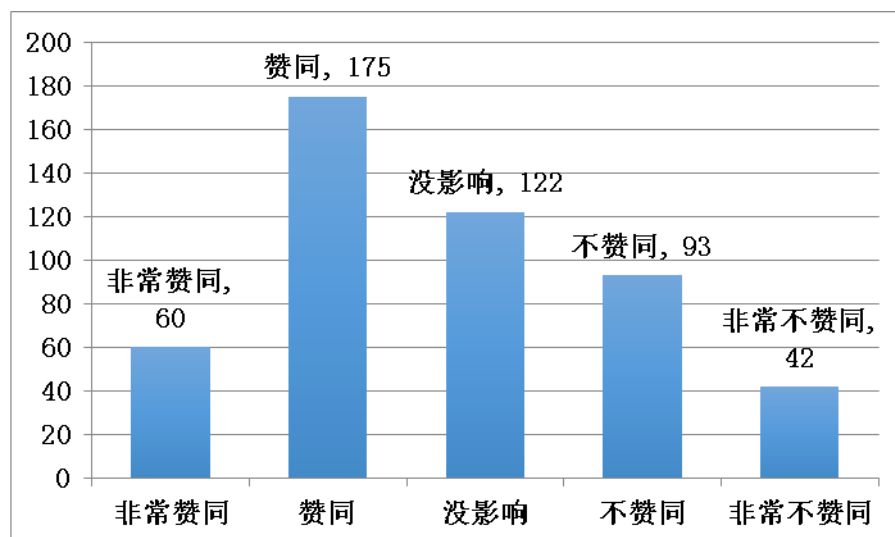


Figure 7-3 Tourism has aggregated air pollution

As for tourists, according to figure 7-4, most of the tourists, at home and abroad, have the same perception to the air cleanliness of Yangshuo. 76% of them agree and strongly agree the air

is clean, 17% of domestic tourists and 5% of foreign tourists remain neutral, and 7% of domestic tourists and 9% of foreign tourists disagree and strongly disagree on that point.

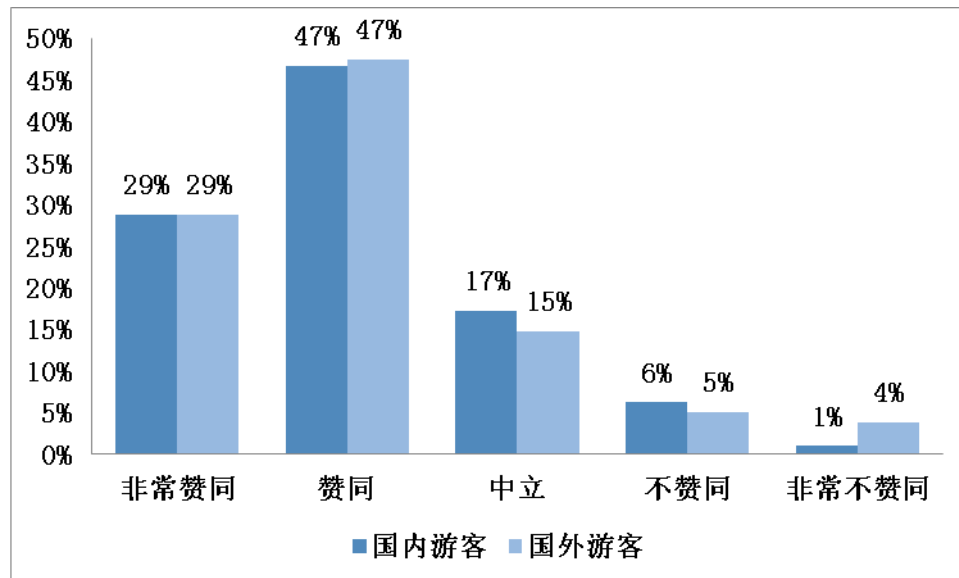


Figure 7-4 Air cleanliness of Yangshuo

Generally speaking, the resident perception to Yangshuo air is low and most of the residents think the air there is not good; however, many tourists agree and strong agree that the air in Yangshuo is clean. The reason of this is that Yangshuo residents attach great importance to their living environment and are sensitive to the change of the local environment. And the tourists, who live there for a short time, only see part of Yangshuo and compare what they see with their cities. Thus, a large gap of perception exists between domestic and foreign tourists.

7.3 Water Resource Environment

7.3.1 Water Resource Utilization and Protection Improvement

According to the *Government Work Report of Yangshuo County 2013*, Yangshuo obtained a financial fund of 120 million Yuan for water conservancy construction in 2013, the highest record in the history. It has completed an investment of 108 million Yuan in water infrastructure construction, added 130km of anti-seepage canal and improved 36,000 mu of farm irrigation. The reinforcement projects for 2 middle-sized reservoirs and water filling wells in Jiuda and Shunmei and 20 small reservoirs in Liuxi and other places have been launched and conducted on schedule. 36 rural drinking water safety projects are done to provide safe drinking water to 17,000 people.

7.3.2 Perception: the Residents Perceive that the Water Quality Gets Worse while the Tourists Think that it is Good

The resident perception to water quality is shown in figure 7-5: 13% of the respondent residents strongly agree that tourism development has exacerbated the local water pollution; and 41% agree on that point. 18% and 7% of them disagree and strongly disagree on that point. 21% think that it has no bearing on water pollution.

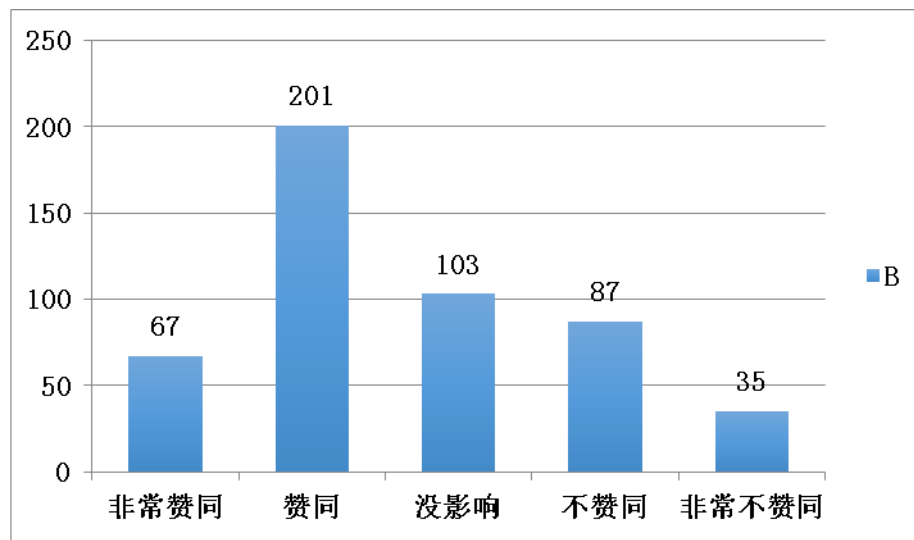


Figure 7-5 Tourism has aggregated water pollution

The domestic and foreign tourists hold different perceptions to the quality of Lijiang River water. 24% of domestic tourists and 13% of foreign tourists strongly agree that the water quality is good, while the percentages of domestic and foreign tourists who agree on that point are 45% and 31% respectively. This shows the high degree of recognition of tourists over water quality. 25% of domestic tourists and 41% of foreign tourists remain neutral. 4% of domestic tourists and 12% of foreign tourists disagree on that point while the percentages of them who strongly disagree are 2% and 3% respectively.

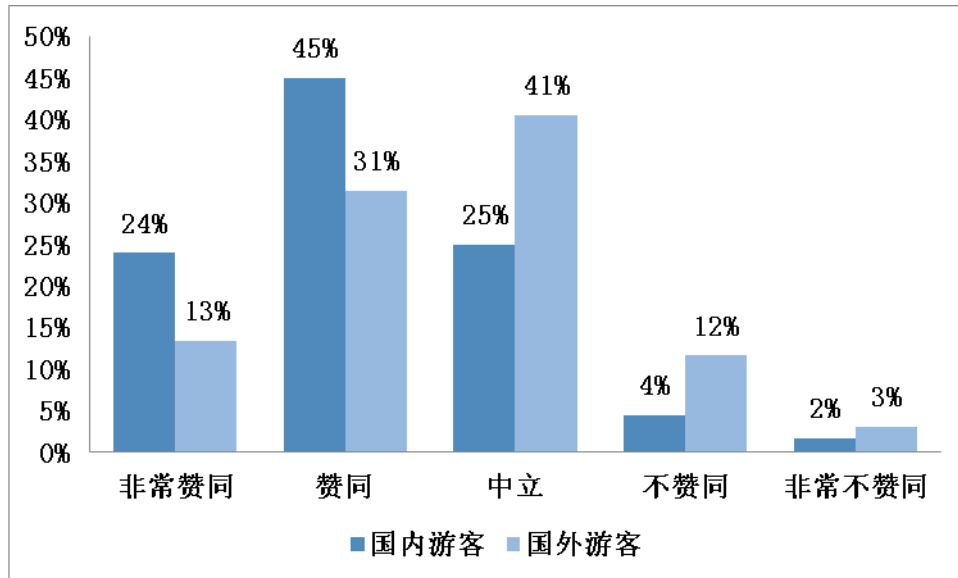


Figure 7-6 Good water quality of Lijiang River

25% of domestic tourists and 11% of foreign tourists strongly agree that the quality of Yulong River water is good, and 41% of domestic tourists and 36% of foreign tourists agree on that point. The percentages of domestic and foreign tourists who remain neutral are 30% and 41%. 3% of domestic tourists and 9% of foreign tourists disagree that the water quality there is good while 2% of domestic tourists and 4% of foreign tourists strongly disagree on that point.

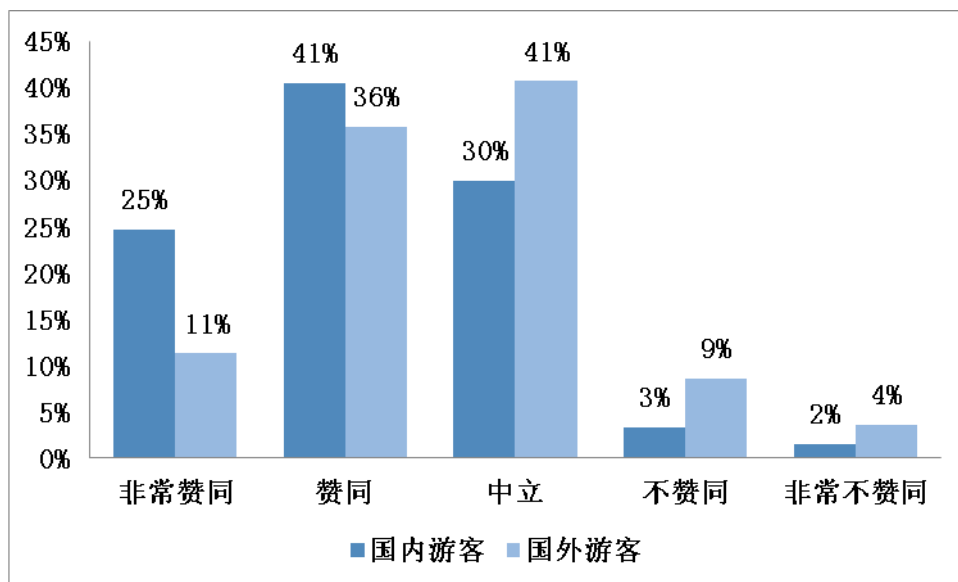


Figure 7-7 Good water quality of Yulong River

Generally speaking, the residents perceive the water quality gets worse, while the tourists think it is good. The overall perceptions of domestic and foreign tourists to the water quality of Yulong River and Lijiang River are in uniform distribution. According to figures 7-5 and 7-6, the

number of domestic tourists choosing Agree is more than that of foreign ones, while the number of foreign tourists choosing Disagree is more than that of domestic ones. This indicates that the perception to water varies with different geographical environment, and that more efforts need to be made to improve and maintain the water as the water, in fact, is not in good quality.

7.4 Noisy Environment

7.4.1 State Quo of the Noise Environment

It is shown in the *Environment Bulletin of Guilin City 2012* that the noise monitoring result of Yangshuo County is lower than the national standard.

7.4.2 Perception: Heavy Noise Pollution

From the resident prospect, 49% and 15% of respondent residents agree and strongly agree that tourism has aggregated noise pollution. 15% and 5% disagree and strongly disagree on that point. 16% hold that tourism has nothing to do with noise pollution.

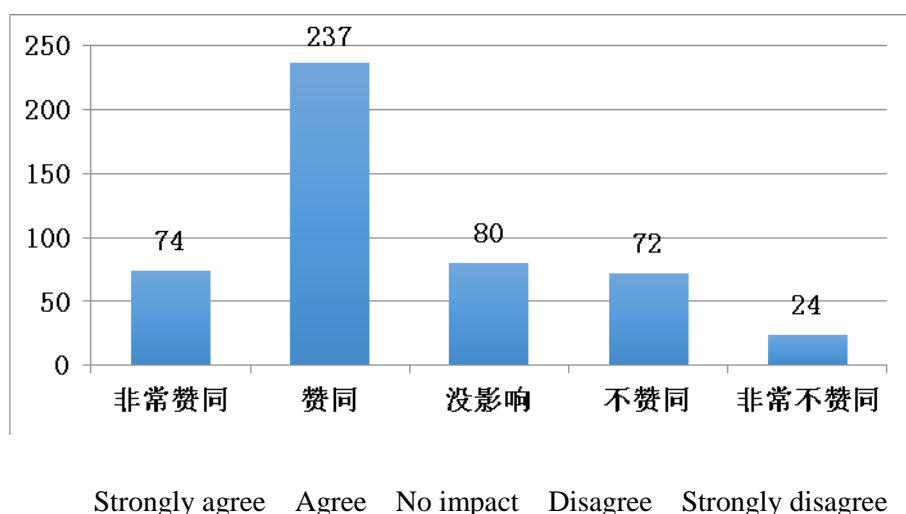


Figure 7-8 Tourist perception to worse noise pollution caused by tourism

From the tourist prospect, 12% of domestic tourists and 16% of foreign tourists strongly agree the noise in Yangshuo is low. However, 4% of domestic tourists and 11% of foreign tourists strongly disagree on that point. The percentages of domestic and foreign tourists choosing Agree are 34% and 27% and those choosing Disagree are 16% and 23%. 35% of domestic tourists and 23% of foreign tourists remain neutral.

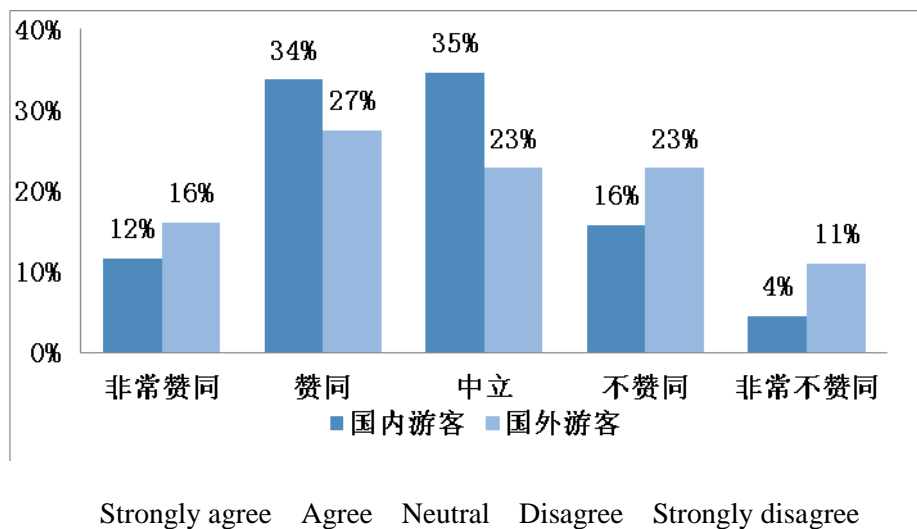


Figure 7-9 Small noise in Yangshuo

Generally speaking, more than half of residents think that the noise in Yangshuo is serious. Some respondent residents hold that the noise brought by tourism development has disturbed their lives, most of which are living in West Street. Domestic and foreign tourists hold different perceptions noise. In general, the perception of domestic tourists to noise is not apparent, while 40% of foreign tourists disagree that the noise is small in Yangshuo because they mainly live in the hotels near West Street and experience how loud the noise is at night.

7.5 Solid Waste

7.5.1 The Rate of Solid Waste Disposal Increases

According to *Government Work Report of Yangshuo County 2013*, a total of 6.5 million were invested in 2013 to restructure and put in to use the leachate equalization basin at the household refuse disposal plant in the County with the disposal rate of 98%, and to renovate 13 public toilets in the County and establish 8 public toilets for towns. In addition, 7.5 million Yuan were invested to expand the sewage pipe network in Kangzhan Road, Pantao Road, Diecui Road, Furong Road, and Tianma Road and from the park's parking lot to the junction of Dangxiao Road, with the sewage disposal rate of 96%.

7.5.2 Perception: the Residents Perceive that the Solid Wastes Increase while the Tourists Think that the Scenic Environment is Clean

From the resident prospect, of 484 valid questionnaires, 49% and 15% of respondent residents agree and strongly agree that tourism has increased solid wastes, 18% think tourism has nothing to do with the solid wastes, and 13% and 5% of them disagree and strongly disagree that tourism has increased solid wastes.

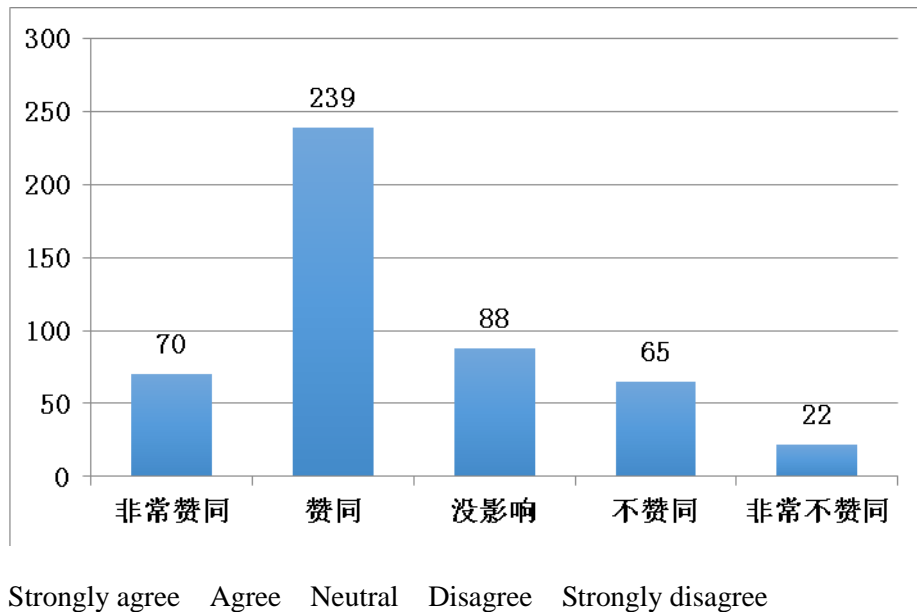


Figure 7-10 Tourism has increased solid wastes

From the tourist prospect, 17% of domestic tourists and 24% of foreign tourists strongly agree that the scenic environment is clean, 47% of domestic tourists and 43% of foreign tourists agree on that point. 27% remain neutral in this regard, while 7% of domestic tourists and 9% of foreign tourists disagree. The percentages of domestic and foreign tourists choosing Strongly Disagree are 2% and 6%.

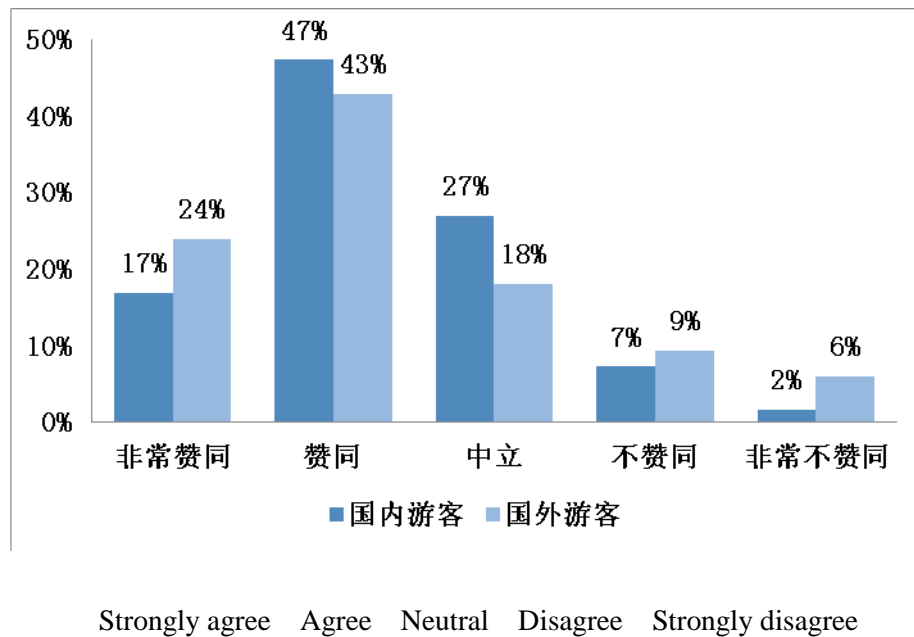


Figure 7-11 The scenic environment is clean

Generally speaking, most of the respondent residents think that tourism development has increased solid wastes. The increase of tourists will produce more domestic wastes in all aspects, such as food, clothing, housing and transportation. It will bring a negative impact on the scenic spot management and tourist's travelling experience if such wastes can't be timely disposed. Most of the tourists are satisfied with the sanitation of the scenic environment. At the same time, there are still a small number of them who think some local environment needs to be improved. The habit of littering by some tourists also disturbs other tourists.

7.6 Landscape Maintenance and Visual Impact

7.6.1 Constant Issue of Measures for Landscape Improvement

According to the *Government Work Report of Yangshuo County 2013*, the editing and revision of the *Overall Planning of Yangshuo County from 2012 to 2030* have been basically completed, in which, to ensure the construction of cities and towns, the planning of land use of the County and 9 towns, the overall planning of Baisha Town, and the control detailed planning of Fuli Town and Xingping Town have been completed and the framework to planning of 250 villages has been done. From March 2012 to March 2013, Yangshuo obtained 4289 mu of construction land, becoming a county with the largest area of construction land within the city. The area of land expropriation and transfer exceeds the total area of those in the remaining 11

counties. 258 construction projects were approved, with the total construction area of 776,000 square meters. A joint supervision mechanism against illegal use and construction of land was established, and 34 cases of illegal land occupation (with the area of 37,000 square meters) and 77 cases of illegal construction (with the area of 31,000 square meters) were investigated.

7.6.2 Perception: the Resident Awareness On Landscape Maintenance Is Poor And the Tourist Perception is Good

Of 492 valid questionnaires, 37% of respondent residents think that hotels and other tourism facilities have no impact on landscape aesthetics. 21% and 9% of them agree and strongly agree that hotels and other tourism facilities have ruined landscape aesthetics, while 26% and 7% disagree and strongly disagree on that point (figure 7-11).

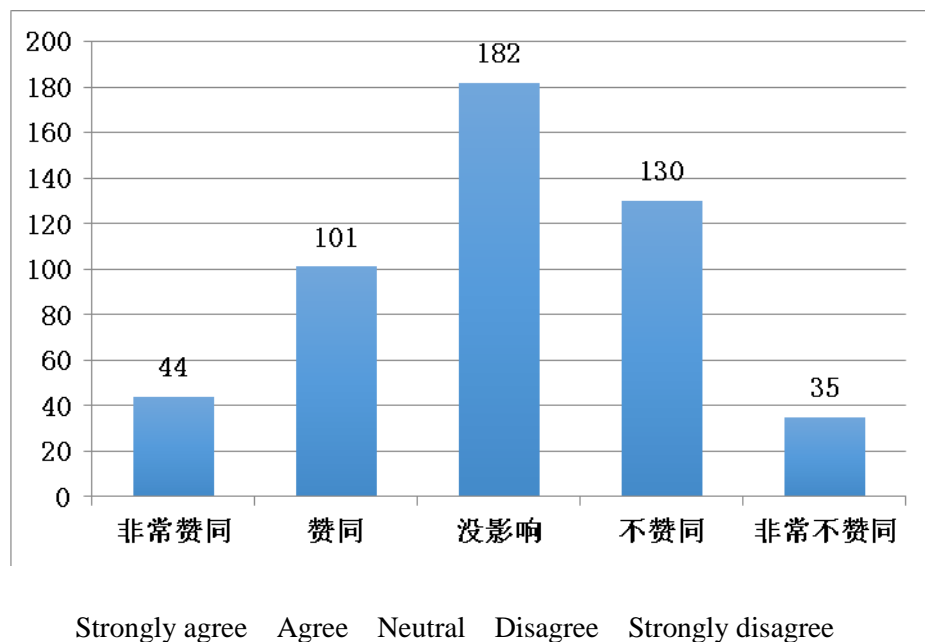


Figure 7-12 Hotels and other tourism facilities have ruined landscape aesthetics

For domestic tourists, 39% and 17% of them agree and strongly agree that the cultural attractions are properly maintained, 35% remain neutral, and 6% and 3% disagree and strongly disagree on that point. For foreign tourists, the percentages of them choosing Agree and Strongly Agree are 39% and 23%, Neutral, 35%, Disagree, 10% and Strongly Disagree, 4%.

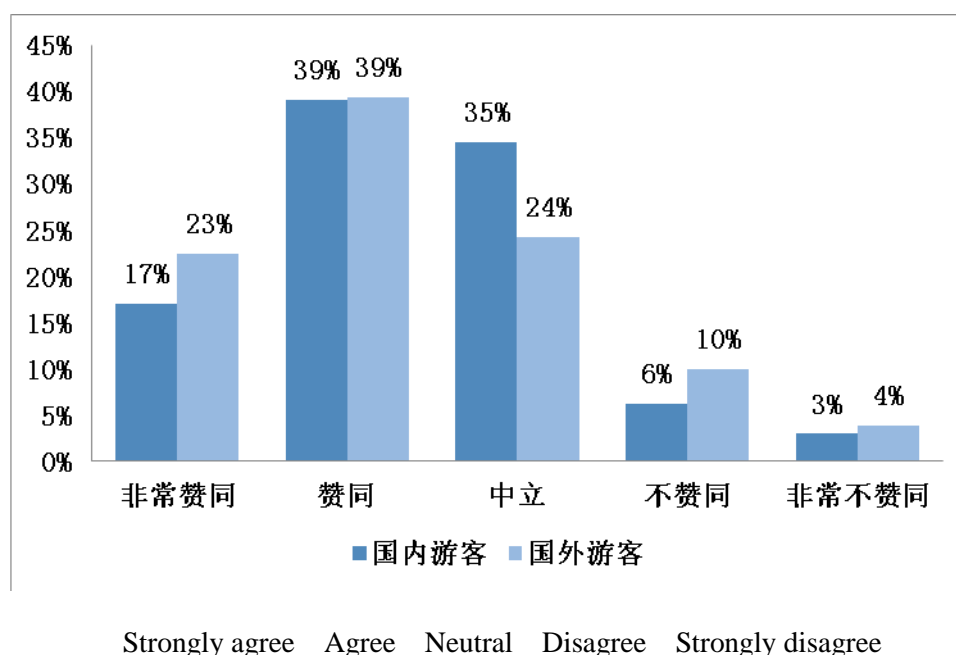


Figure 7-13 The cultural attractions are properly maintained

In terms of the resident perception, most of the residents think hotels and other tourism facilities bring economic benefits instead of destroying the landscape aesthetics, so they are not aware of the importance of environmental landscape protection. As for tourists, both domestic and foreign tourists think that the cultural attractions are properly maintained, however, more foreign tourists disagree on that point. This indicates that more efforts shall be made to maintain the cultural attractions.

7.7 Energy-saving Management

As early as 2011, Yangshuo invested 29.88 million Yuan in completing 83 rural power grid transformation projects in 63 natural villages of 9 towns, improving the power supply quality of the electric network. In terms of energy conservation, Yangshuo County government promotes the use of clean energy to the tourism enterprises and encourages them to adopt energy-saving measures. In this round of monitoring, the team randomly surveyed and interviewed the owners of different types of tourism enterprises in Yangshuo County, and recovered 76 valid questionnaires. The results of the questionnaires (Figure 7-13) shows 35% of enterprises have taken measures to save energies and water resources, including using energy-saving lamp, saving water intentionally (such as using water within limited time and controlling power supply), and using solar electrical appliance, etc. 28% of enterprises have not done so but intend to do so, and

37% have not done so nor intend to do so. The main reasons for this, as the team found out in the interviews, can be divided into two classes: first, they want to save the equipment cost; and second, they don't know the approaches and measures of energy saving.

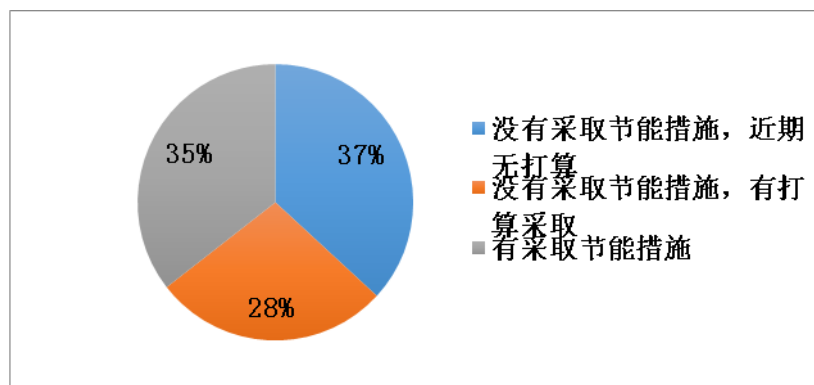


Figure 7-14 Proportion of enterprises taking energy-saving measures

7.8 Summary of the Chapter

Generally speaking, the tourism environment and environmental protection are relatively satisfactory in Yangshuo. The related policies introduced by the government have promoted the environmental protection and achieved certain progress. In terms of atmospheric and aquatic environment, the resident perception to atmosphere and water is relatively poor, while the tourist perception to the same is good. As for noise control, more efforts need to be made to control the noise in Yangshuo. Tourists and residents living in some area feel that their lives are disturbed by the high noise intensity. In terms of solid waste, the household refuse disposal system in the county and towns has been improved. With the increase of tourists, the residents think that the solid wastes increase accordingly, while the tourists think that the scenic environment is clean. With regard to landscape, the residents don't think that the buildings ruin the landscape, while the tourists generally think that the cultural attractions are properly maintained. As for energy management, the rural power grid transformation for natural villages in 2011 improved the quality of the electric network, but the situation of energy conservation among enterprises seems not very optimistic. To improve the above problems, the following measures shall be taken:

First, to develop tourism in Yangshuo, it is necessary to take into account how the local resident feel. The atmospheric and aquatic environment shall be further improved to provide a benign living environment to local residents.

Second, the noise intensity is high in some areas of Yangshuo. Particularly, in West Street, the shouts of street vendors and the music from the bars at night seriously disturb the residents and tourists living around, and at the same time, lower the tourism experience. So, it is necessary to control the noise in those areas.

Third, as the tourism development is getting better in Yangshuo, more wastes will be produced by tourists. So, it is necessary to further improve the efficiency and effect of waste disposal.

Fourth, the resident awareness on environmental protection shall be improved. It can be found from the resident perception to landscape destruction caused by the buildings that the residents are not aware of the harm in this aspect. So, propaganda and education are required.

Fifth, the enterprise space of energy saving and environment protection needs to be further expanded and promoted to put the measures of energy saving and environment protection into place and realize the sustainable tourism development.

The survey and analysis on the supply and demand of Yangshuo's tourism products and services is the basic requirement to enhance tourist satisfaction and accelerate the tourism development, as well as the key to the sustainable development of the tourism market in Yangshuo. In the round of monitoring, the development of Yangshuo's tourism products and services are surveyed by means of questionnaires and observation. On the one hand, the questionnaires were distributed to the tourists to get to know their primary motives of visiting Yangshuo and their tour routes for the purpose of monitoring the demand characteristics of the tourism market in Yangshuo; on the other hand, the survey on the provision of tourism hardware service was conducted by means of observation to get a clear picture of Yangshuo's capability to provide tourism services as well as its potential to develop tourism in the future.

Chapter VIII Tourism Products and Services

8.1 Monitoring Indicators of Tourism Products and Services

In this part, the diversity of tourism products and services scope and the image of tourism destination are used to indicate the development of the tourism products and services in Yangshuo. The monitoring indicators are concluded according to the *Indicators of Sustainable Development for Tourism Destinations*. See table 8-1.

Table 8-1 Monitoring indicators of tourism products and services

Main monitoring aspect	Monitoring indicator
Expectation of tourists to tourism products	Tourist's purpose to Yangshuo
	Expected length of stay in Yangshuo
Tourist choice of tourism products	Shops attracting tourists
	Consumption of tourism products
	Tourist choice of tourism attractions
Tourism services scope	Types of the basic tourism service facilities at the tourism destinations
	Distribution of tourism service facilities
Destination image/tourist's response to tourism products	Channels for tourists to get the destination information
	Destination information expected by the tourists
	Willingness of tourists to revisit
	Willingness of tourists to recommend Yangshuo to others

8.2 Indicator Analysis

By distributing the tourist questionnaires designed based on the above indicators and carrying out a field survey, the survey team succeeded in collecting the primary data and, under the assistance of the relevant local administrative departments, some secondary data as the supplementary and supporting information. It uses the data and information obtained to analyze the matters related to tourism products and services, including the characteristics in four major aspects, such as tourist expectation, tourism products, tourism service facilities and destination image, as well as monitors the sustainable development of the tourism products and services at the tourism destination.

8.2.1 Tourists' Purchase Characteristics

The following two questions in the monitoring questionnaire, such as “What is your motivation to come to Yangshuo?” and “How long do you plan to stay in Yangshuo?”, will mainly reflect the index of expected characteristics before the tourists' spending, which will be analyzed and explained through data results from the questionnaire, combined with field observations and interviews.

8.2.1.1 Traveling Purpose: Still Based on Sightseeing and Leisure

Traveling purpose reflects, to some extent, the expectations of the tourists on tourist destinations. It is the understanding of tourist expectations and spending motivations that will be an important prerequisite to understand market demand and segmentation. According to the results of the questionnaire on what the tourists' motivation to come to Yangshuo is, it is analyzed as shown in Table 8-2 and Figure 8-1. (multiple choices, optional for the tourists to select multiple traveling purposes)

Table 8-2 Comparison table of traveling purpose for domestic and foreign tourists

Traveling purpose	Domestic tourists		Foreign tourists	
	Percentage	Sorting ⁴	Percentage	Sorting
Sightseeing	68.6%	1	71.1%	1
Leisure & vacation	64.7%	2	43.3%	2
Business events	3.3%	8	2.9%	8
Official meetings and survey	2.5%	9	0.4%	13
Incentive travel of the company and unit	5.8%	5	1.2%	11
Religious worship	0.5%	13	0.8%	12
Scientific expedition	1.1%	11	1.7%	10
Wild adventure	3.7%	6	24.0%	4
Photography	10.5%	4	16.5%	5
Family & friend visiting	3.4%	7	8.7%	6
Festival activities	1.0%	12	2.9%	8
Understanding of culture and cuisine	21.3%	3	25.2%	3
Others	2.3%	10	8.3%	7

Visibly, most of the tourists focus on sightseeing and leisure and vacation, where 68.6% of domestic tourists choose the sightseeing as their motivation and 64.7% of domestic tourists choose leisure and vacation, with an increase compared with 61.97% and 63.14% in 2012 respectively; the sightseeing prevails, but there is little proportion difference between them, and sightseeing and leisure and vacation mainly function in Yangshuo as a popular tourist destination.

⁴ Note: It is sorted from 1 to 14 based on the proportion of the tourists selecting this item in the table, and the bigger the proportion is, the closer the sorting near to the top is.

As for foreign tourists, it is primary for sightseeing, for example, sightseeing tourists account for 71.1%, while the tourists for leisure and vacation account for 43.3%.

In addition, the proportion of the understanding of culture and cuisine is ranked third in the choice of domestic and foreign tourists, with an increase compared with 13.07% domestic tourists and 19.89% foreign tourists in 2012, showing that the tourists pay more attention to the expectations of the understanding of local culture and cuisine, and therefore, in the design of local tourism products and services, appropriate importance will be attached to the products and services related to the culture and cuisine.

Photography and wild adventure are notable. The proportion of the said two certainly increases, compared with the data in 2012, especially in wild adventure, in which, the proportion rises to #6 from #8 in domestic tourists, while it rises to 24.0 % from 17.68% in foreign tourists, roughly showing that more tourists start to pay attention to the adventure and photography in Yangshuo, conducive to develop diversified Yangshuo tourism products and services which satisfy sustainable tourism development in Yangshuo.

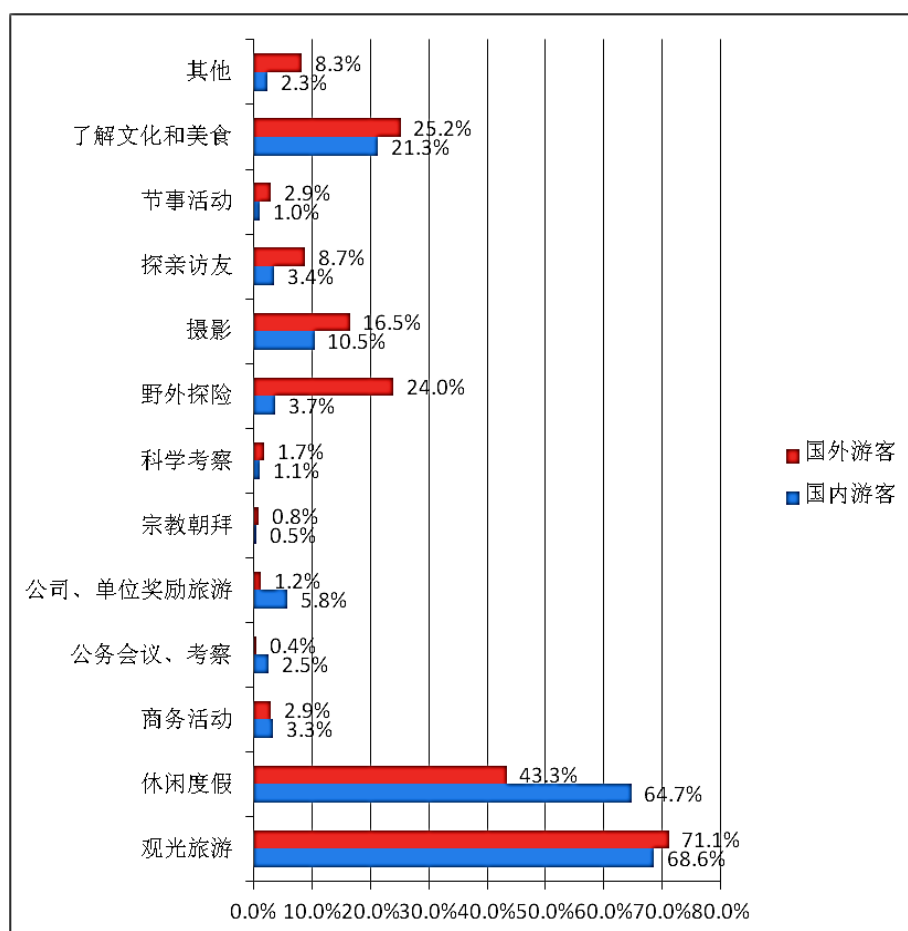


Figure 8-1 Comparison of traveling purpose for domestic and foreign tourists

In Figure 8-1, the comparison of traveling purpose of domestic and foreign tourists can be more clearly; although with both sightseeing and leisure and vacation as the most important tourist purposes, the proportion of “Leisure and vacation” for foreign tourists is significantly lower than that of domestic tourists, possibly because of different awareness and expectations of tourism products related to leisure and vacation between domestic and foreign tourists. In addition, "wild adventure" is more obviously different, i.e. 24.0% for foreign tourists and only 3.7% for domestic tourists, mainly due to different awareness and acceptance of new tourism products, and meanwhile the choice of foreign tourists also indicates the conditions and potentials of adventure tourism products in Yangshuo. In incentive travel of the company and unit, the proportion of domestic tourists is higher.

Differences of traveling purpose between domestic and foreign tourists will bring about an affect on their choice of tourism products and services. More diversified tourism products are required to meet different needs of tourists in tourism purposes.

8.2.1.2 Expected Stay: Short-term-oriented, along with Longer Stay for Foreign Tourists

Expected stay in Yangshuo reflects, to some extent, the tourists' expectations of tourism products and services and actual overall perception in Yangshuo. "Usually, richer variety of activities could attract the tourists to stay and experience longer". Therefore, this indicator can also reflect the diversity of tourism products and services in tourist destination, and show whether it can attract the tourists and meet their needs. According to the questionnaire results, the stay of domestic and foreign tourists in Yangshuo is analyzed as shown in Figure 8-2.

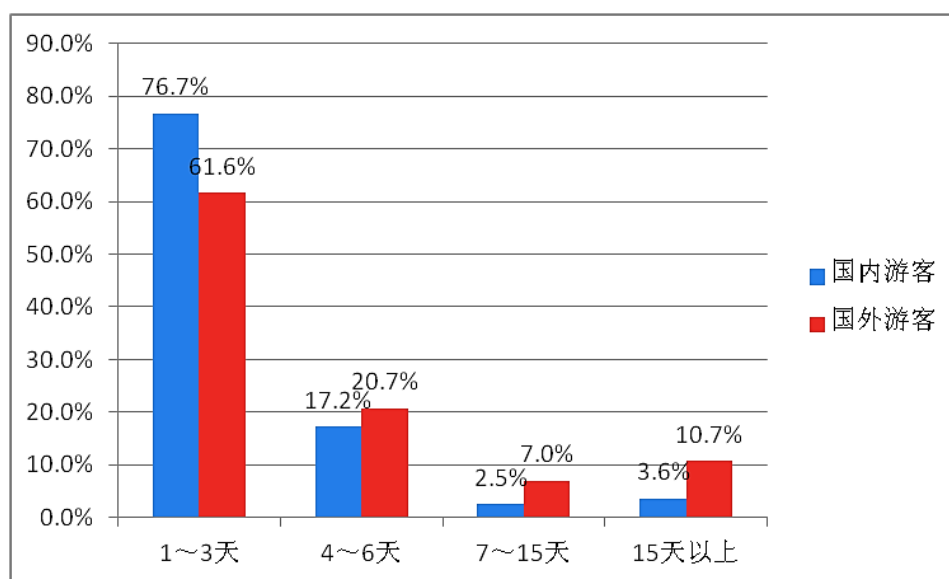


Figure 8-2 Tourists' stay in Yangshuo

It can be seen from Figure 8-2 that the stay of both domestic and foreign tourists focus on 1-3 days, for a short stay. This is certainly related to tourism purpose, for example, single sightseeing causes short stay in local attractions.

Compared with domestic tourists, foreign tourists stay relatively long, and the proportion of 7-15 days and more than 15 days is significantly higher than that of domestic tourists respectively, which is also related to traveling activities of foreign tourists. It is learned in the interviews that foreign tourists select the following activities, like learning of Taiji, kung fu and language or teaching, so such special tourism activities require more stay time. Except for special tourism activities, foreign tourists not only select local sightseeing and leisure, but also tend to deeply understand local life and culture. In tourist-concentrated popular area in China, fewer foreign tourists are found. Different tourism products and activities due to different traveling motivation

lead to the differences in the stay of domestic and foreign tourists, and it is visible that attention shall be paid to demand difference of the groups as to the products and services provided to different market groups, and also tourism products and functions bring about an important affect on the tourists' stay.

8.2.2 Tourism Products

Monitoring indicators of tourism products are mainly reflected in "Shops attractable to the tourists", "Tourism commodities" and "Tourist route" (i.e., tourist-selected attractions). The task force has conducted statistical analysis on the basis of the questionnaire results and related data.

8.2.2.1 Shops Attractable to the Tourists: Still Dominated Bars and Handicraft Shops

Attention paid to the attractiveness of local shop types to the tourists can be used to not only understand the interest and demand of the tourists and meanwhile reflect the development of local shops to some extent, but also play a certain role in positioning tourist destination in different tourist groups, and contributing to balanced development of local business environment and maintaining the diversity. (multiple choice, optional for the tourists to choose multiple types of the shops which they are interested in.)

Table 8-3 Types of the shops favorable for domestic and foreign tourists

Shop Type	Domestic tourists		Foreign tourists	
	Percentage	Sorting ⁵	Percentage	Sorting
Hotel & guesthouse	18.50%	5	10.30%	8
Western Restaurant	16.70%	6	23.90%	5
Bar	49.20%	2	33.80%	2
Apparel store	20.70%	4	25.20%	4
Handicraft shop	54.80%	1	29.10%	3
Specialty shop	21.60%	3	12.80%	7

⁵ Note: It is sorted from 1 to 14 based on the proportion of the tourists selecting this item in the table, and the bigger the proportion is, the closer the sorting near to the top is.

Video store	2.20%	11	1.30%	12
Chinese restaurant	7.40%	7	54.30%	1
Travel agency, tourist consulting service and ticket agency	2.30%	10	13.70%	6
Foreign language school	1.50%	12	6.80%	10
Shop for health care and preservation and leisure	3.10%	9	8.10%	9
Others	4.30%	8	6.80%	10

From Table 8-3, the followings like handicraft shop, bar, specialty shop and apparel store are most attractive to domestic tourists. Compared with the data in 2012, the proportion of bars and apparel stores rises certainly, from 40.82% to 49.20% and from 15.27% to 20.70% respectively, indicating the attractiveness of these two shop types increases.

As for foreign tourists, the followings like Chinese restaurant, bar, handicraft shop, and apparel store are most attractive. Compared with the data in 2012, the proportion of apparel stores rises certainly, from 18.23% to 25.20%, the proportion of Chinese restaurants rises about 7%, and the proportion of the bars rises about 5%.

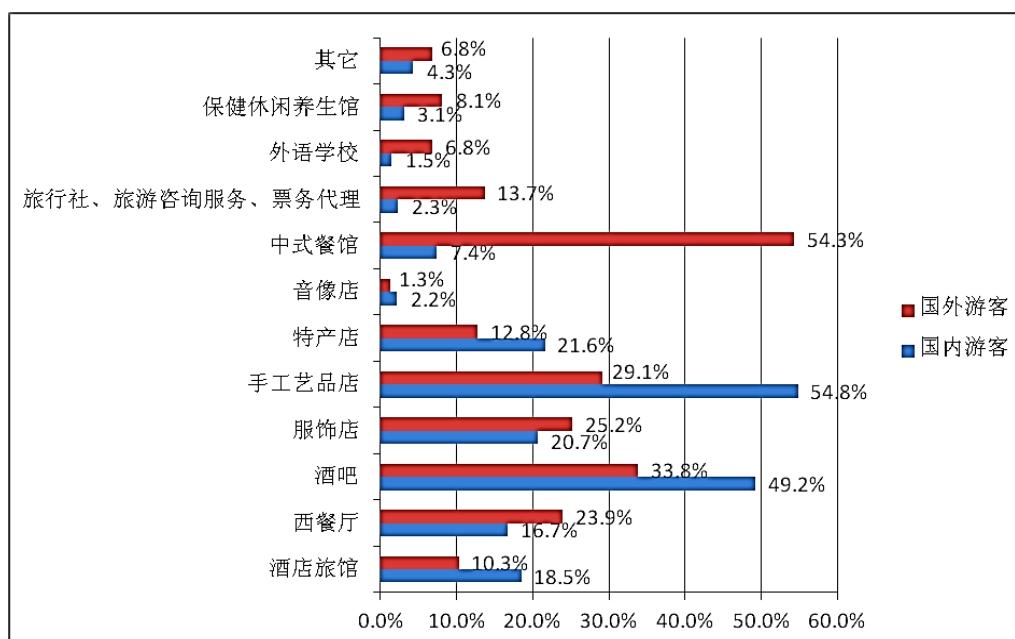


Figure 8-3 Shop type attractable to domestic and foreign tourists

It can be seen from the comparison in Figure 8-3 that domestic tourists do not share the same view of attractive shop types with foreign tourists who pay more attention to Chinese restaurants, while less attention to handcraft shop, specialty shop and bar than domestic tourists, possibly because foreign tourists consider local Chinese restaurants are more representative of local culture in Yangshuo; in addition, foreign tourists show more interest in travel agency, tourist consulting service and ticket agency than domestic tourists, possibly due to local information assistance required by foreign tourists accessible to less information.

Why more focus of domestic tourists on hotel and guesthouse is larger than that of foreign tourists may probably lie in that it is more novel and popular to domestic tourists accessible to family hotel, inn and youth hostel with local characteristics.

Overall, it is bar and handcraft shop that are currently most attractive in Yangshuo, and it is required to pay more attention to the differences and changes of interest and demand of domestic and foreign tourists, and the development of the shops satisfying the needs of different tourists, and maintain the diversity and balance.

8.2.2.2 Tourist Commodities: Dominated Handcraft and Specialty Food

As the tourists' spending of local tourist commodities is one of important indicators to evaluate local products and services, it will be analyzed in this monitoring through local tourist

commodity type and purchase reason spent by the tourists in the local. (multiple choice, optional for the tourists to choose purchased commodity types and why they purchased.)

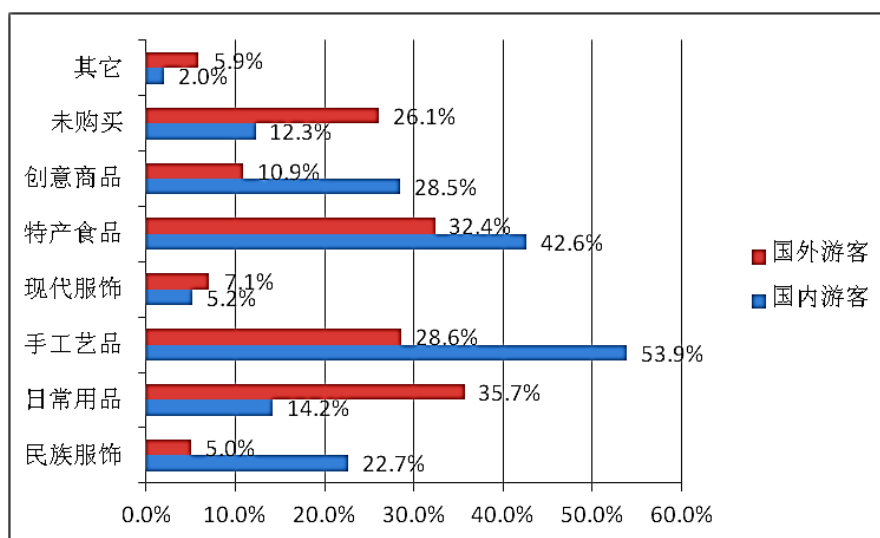


Figure 8-4 Consumption of tourist commodities of domestic and foreign tourists

It can be seen from Figure 8-4 that domestic tourists pay more attention to handicraft, specialty food, creative commodity and ethnic costumes, while foreign tourists mostly focus on daily item, specialty food and handicraft. As this is basically consistent with the commodity corresponded to tourist-interested shop type, it shows that tourist commodities like local special handicraft and specialty food in Yangshuo are much attractive to the tourists. That foreign tourists purchasing such commodities are significantly less than domestic tourists may explain such commodities do not conform well to the awareness of foreign tourists to local folk culture, and not reflect representative culture.

In addition, there is still a certain proportion of tourists not purchasing any tourist commodity (12.3% domestic tourists, and 26.1% foreign tourists), indicating that there is still some space for tourist commodities in Yangshuo, and it is required to consider how to further enhance the uniqueness and attractiveness of local tourist commodities.

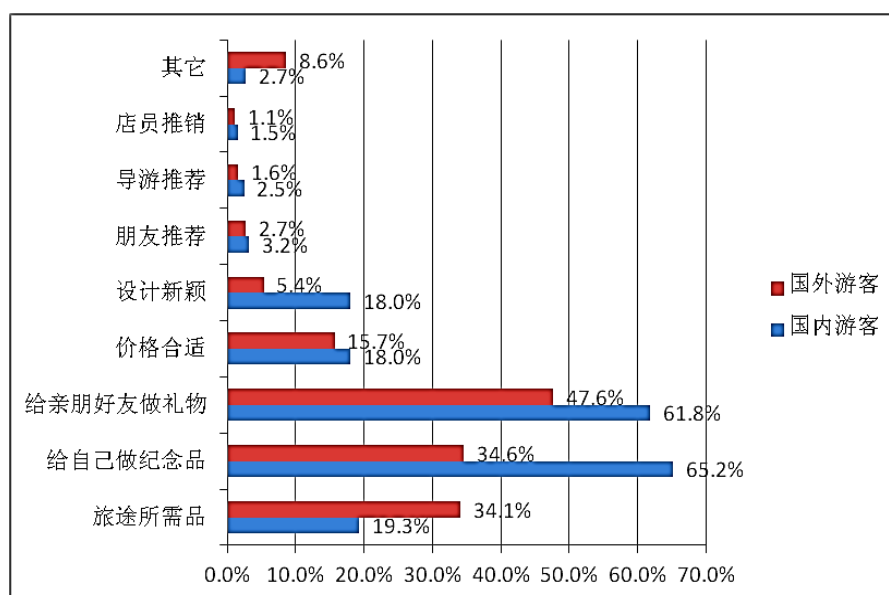


Figure 8-5 Why domestic and foreign tourists buy tourist commodities

Why the tourists buy the commodities can be seen from Figure 8-5. Visibly, it is to buy themselves or friends and family souvenirs or gifts as main reason for both domestic and foreign tourists, indicating the tourists are willing to buy the souvenirs and local tourist commodities can satisfy such demand to some extent. Second, it is because journey thing works, i.e. the needs of the tourists can not be neglected. But the proportion of the souvenirs or gifts bought by foreign tourists is less, it may be associated with travel distance.

In general, the tourists' needs of the commodities are mainly reflected in local special commodities like handcraft and specialty food, which mainly satisfy the souvenirs or gifts, followed by daily item demand in the trip.

8.2.2.3 Tourist Choice of Attractions: Still First Choice of West Street and Lijiang River

Main attractions in Yangshuo County include: Yangshuo West Street, Moon Hill, Li Village, Yulong River, Peach Resort, Ancient Guilin Show, Big Banyan Tree Scenic Area, Impression on Sister Liu, Longjing River rafting, Xingping Fishing Village, Lijiang River, Ten-mile Gallery, Mushan Village and East Street. The task force has selected the following 13 well-developed scenic spots as monitoring range of attractions, to study the tourists' choice of the attractions. (multiple choice, optional for the tourists to choose the attractions.)

Table 8-4 Tourists' product preference in the attractions

Tourist attractions	Domestic tourists		Foreign tourists	
	Percentage	Sorting ⁶	Percentage	Sorting
West Street	86.9%	1	70.5%	2
Lijiang River	78.4%	2	84.2%	1
Huangbu reflection	36.3%	6	37.8%	5
Qing'e Ferries	13.9%	11	6.2%	11
Butterfly Spring	31.5%	8	4.6%	13
Ancient Guilin Show	32.3%	7	3.7%	14
Jianshan Temple	8.8%	12	6.2%	11
Big Banyan Tree	43.0%	4	10.4%	9
Yulong River	44.4%	3	38.2%	4
Moon Hill	38.2%	5	46.5%	3
Longjing River rafting	17.6%	9	10.8%	7
Yang Di scenic spot	15.6%	10	10.0%	10
Fuli Ancient Town	4.5%	14	12.4%	6
Others	4.6%	13	10.8%	7

It can be seen from Table 8-4 that the majority of domestic and foreign tourists take West Street and Lijiang River as the attractions in tourist line. 86.9% domestic tourists and 70.5% foreign tourists will visit West Street, while 78.4 % domestic tourists and 84.2% foreign tourists will go to Lijiang River, respectively ranked first and second, similar to the results in 2012, indicating core status and product maturity of these two attractions in Yangshuo.

⁶Note: It is sorted from 1 to 14 based on the proportion of the tourists selecting this item in the table, and the bigger the proportion is, the closer the sorting near to the top is.

In addition, the followings like Yulong River, Moon Hill and Huangbu reflection are popular to domestic and foreign tourists, accounting for about 40% both, similar to the results in 2012, indicating that these places have gradually been developed into landmark attractions in Yangshuo – important attractions out of West Street and Lijiang River.

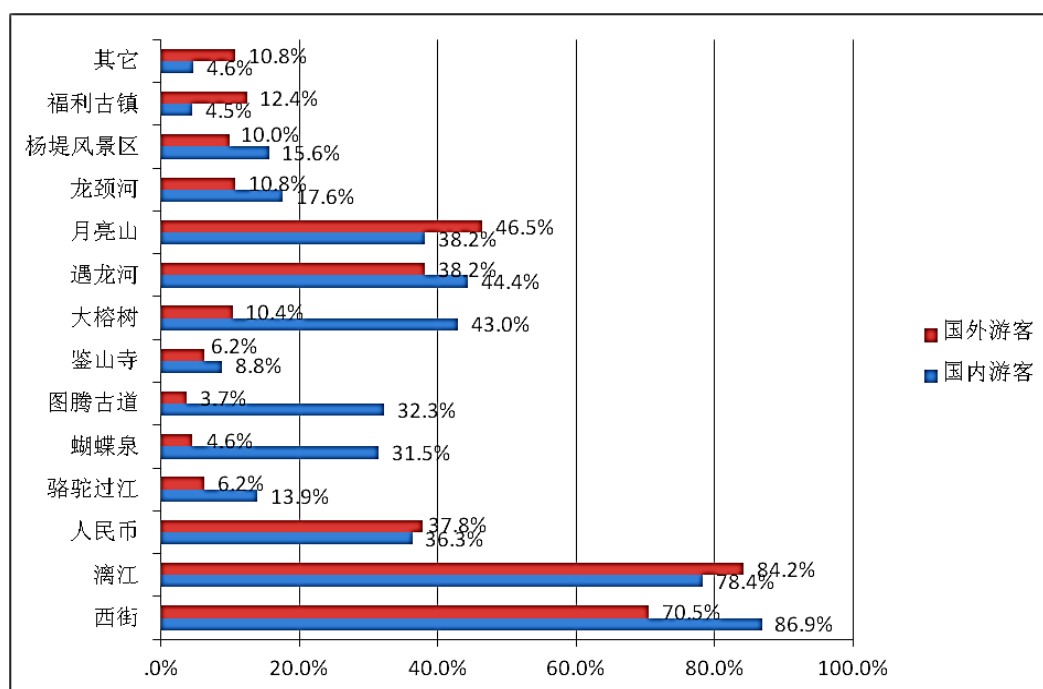


Figure 8-6 Choice of the attractions by domestic and foreign tourists

It can be seen from the comparison in Figure 8-6 that a bigger difference in the choice of some tourism products has been shown between domestic and foreign tourists. Domestic tourists pay more attention to Ancient Guilin Show, Butterfly Spring and Big Banyan Tree, which, through observation and interviews, are arranged by travel agencies, but selected by fewer foreign tourists as public attractions. Folk culture represented by Fuli Ancient Town has been welcomed by foreign tourists. Moreover, other attractions are selected by foreign tourists, including, based on the text and interviews, countryside, rock climbing and Yinshui rock.

In summary, the landmark attractions like West Street and Lijiang River are still very attractive to the tourists at home and abroad, while the followings including Yulong River, Moon Hill and Huangbu reflection gradually play an important role. Some public attractions, artificially created and constructed, like Ancient Guilin Show, Butterfly Spring and Big Banyan Tree are selected by more domestic tourists. Foreign tourists are more inclined to select the attractions with fewer public tourists, but folk culture or satisfaction of special traveling demand.

8.2.3 Tourism Service Scope

Monitoring indicators of tourism service scope primarily focus on “Basic tourism service facility type in tourist destination” and “Hardware distribution in tourist destination”. To this end, the task force was divided into three groups to conduct a half-day on-site investigation and collect first-hand shop data respectively in three areas.

It includes main gathering areas of tourists and residents in Yangshuo County, divided into Area A / B / C.

Area A, yellow area in Figure 8-7, mainly refers to surrounding streets centered by West Street, including West Street, New West Street, Baoquan Road, Bilian Road, Binjiang Road, Chengbei Road, Chengzhong Road, Diecui Road, Furong Road, Fuqian Road, Guihua Road, Lianfeng Road, Pantao Road, Rongyin Road, Shenshan Road and Xianqian Road.

Area B, green area in Figure 8-7, mainly refers to the surroundings of Jingfeng Road, including Jingfeng Road, Chengxi Road, Huashan Road, Jiangjun Road, Lanhua Road, Longyue Road, Xiangshui Road, Yuxi Road, Wuteng Lane and others.

Area C, red area in Figure 8-7, mainly refers to the surroundings of Shima Road and Kangzhan Road, including Shima Road North, Shima Road South, Kangzhan Road, Fengming Road, Guanlian Road, Jinshi Road, and Wujing Road.

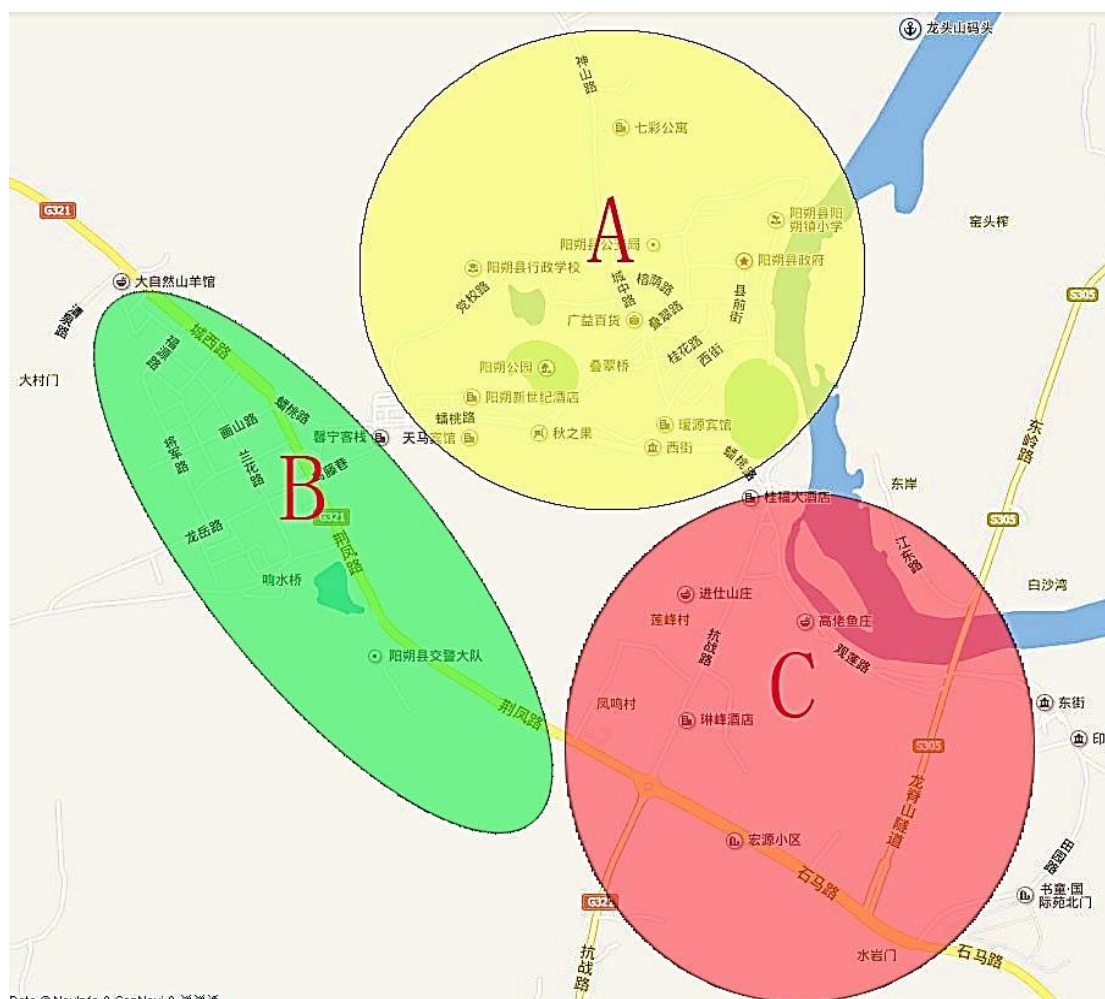


Figure 8-7 Zoning distribution of service facilities in Yangshuo County

8.2.3.1 Service Scope: More Comprehensive Services Provided for the Tourists

Based on field investigation, tourism services provided for the tourists in Yangshuo County include:

Hotel & guesthouse (hotel, family house, inn, youth hostel etc.)

Restaurant (hotel, Chinese restaurant, food stall, rice-flour noodle shop, snack bar, etc.)

Bar and western restaurant (bar, KTV, coffee shop, Hong Kong style restaurant, French restaurant, American chain restaurant, etc.)

Souvenir shop (ethnic costumes store, handcraft shop, specialty supermarket, jade shop, specialty apparel store, calligraphy and painting shop, etc.)

Tourism service (travel agency, bicycle rental, rock climbing club, agency for air, train and coach tickets, tourist consulting company etc.)

Chinese health care (foot massage, foot bath, massage, chiropractic massage, sauna, recreation center, leisure clubs, massage center, health club, etc.)

Foreign language school including foreign language school and English college, etc.

Public service facilities (bank, post office, hospital, large clinic, government department, school, public toilet, telecommunications, pharmacy and supermarket)

General merchandise (grocery, canteen, hardware store, small supermarket, news kiosk, and convenience store etc.)

Casual clothing (including brand apparel store, casual clothing store, lingerie store, bedding store, shoe store, luggage store, children's clothing store, etc.)

Other services (furniture, appliance, decoration material shop, etc.)

It can be seen that service facilities in Yangshuo county are more comprehensive and perfect, and a variety of service facilities can meet daily and tourism needs of residents and tourists.

8.2.3.2 Service Facilities Distribution: Separated between Tourists and Residence, and Distributed More Reasonably

See the table below for shop quantity in areas and the proportion in total shop number.

Table 8-5 Quantity and proportion of various shops

Area	Area A		Area B		Area C	
Shop type	Quantity	Proportion	Quantity	Proportion	Quantity	Proportion
Hotel & guesthouse	207	14.69%	94	15.36%	56	12.44%
Restaurant	214	15.19%	107	17.48%	65	14.44%
Bar	43	3.05%	1	0.16%	0	0.00%
Western restaurant	49	3.48%	0	0.00%	0	0.00%
Souvenir	187	13.27%	8	1.31%	23	5.11%
Tourism service	59	4.19%	10	1.63%	7	1.56%
Chinese health	38	2.70%	36	5.88%	3	0.67%

care						
Foreign language school	9	0.64%	4	0.65%	0	0.00%
Public service facilities	104	7.2%	70	11.4%	57	12.6%
General merchandise	199	13.7%	66	10.7%	173	38.4%
Casual clothing	168	11.6%	5	0.8%	4	0.9%
Others	124	8.6%	210	34.1%	57	12.6%
Object						
Shops for tourists	610	42.1%	191	31.2%	112	24.9%
Shops for tourists and residents	475	32.8%	101	16.5%	98	21.8%
Shops for residents	324	22.3%	319	52.1%	239	53.1%

According to Table 8-5 and Figure 8-8, it can be seen from the comparison of shop type proportion in the areas that Area A refers to commercial and tourist compact district, where the number of service facilities including hotel & guesthouse, restaurant, bar, western restaurant, souvenir and tourism service is significantly more than that in other areas, and from the proportion, the shops in Area A mainly focus on the tourist.

Area B refers to a mixing area of tourists and residents. From the quantity, there are more hotels and guesthouses and restaurants, and less shopping venues like souvenir and apparel stores, indicating that the needs of accommodation and catering can be satisfied in this area, but commercial shopping is less strong. From the proportion, it is equal between shops for tourists and for residents.

Area C is mainly residential area. From the quantity, there are fewer hotels and guesthouses, almost no bar and western restaurant, but more facilities serving the residents like general merchandise. From the proportion, it is least for the tourists in three areas, but it is largest in shops serving the residents.

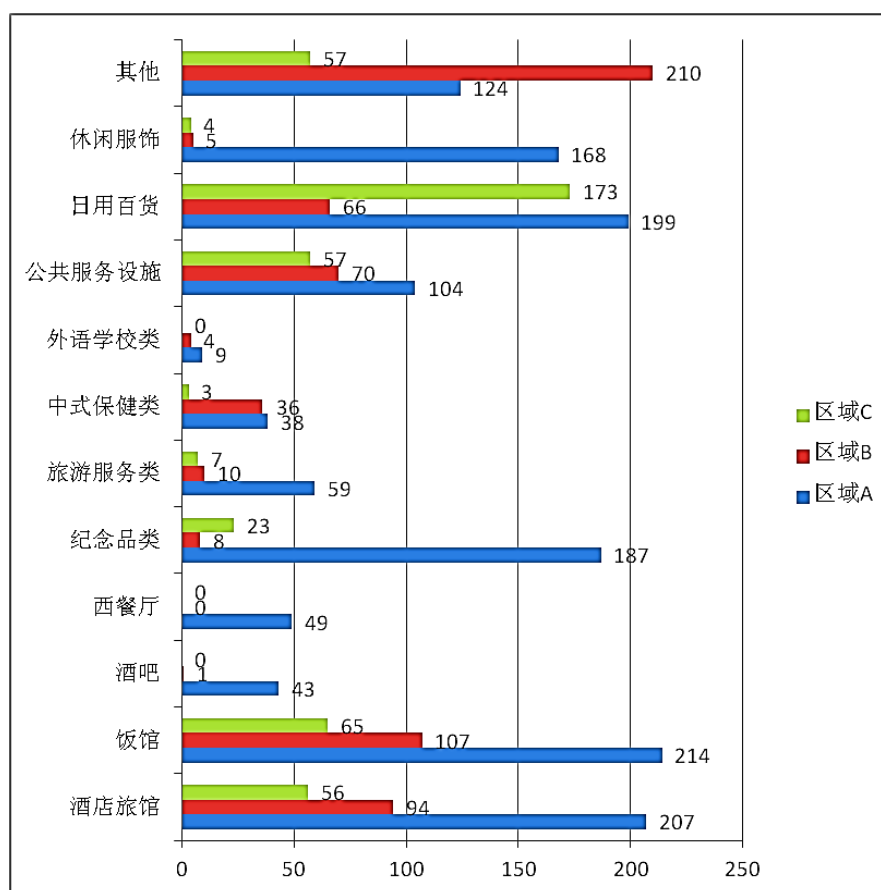


Figure 8-8 Quantity comparison of tourism-related shops in the areas

From the functions, there are more hotels, restaurants, public service facilities and general merchandises, distributed in a more balanced form in various areas, while some shops like bar, western restaurant, tourism service and souvenir shops are distributed in a more concentrated form, which can more satisfy the needs of residents and tourists; thus tourism development does not disproportionately affect the lives of residents, and public services and commodities widely distributed will be more convenient to daily needs of residents and tourists.

8.2.4 Tourist Response to Tourism Products

Image indicators of tourist destination are mainly embodied in “Information channel accessible to tourist destination”, “Tourism information excepted by tourists”, “Revisiting willingness of tourists” and “Tourist recommendation willingness”, and the corresponding questionnaires will be used to analyze tourist expectation of destination image, information access, image perception and communication.

8.2.4.1 Information Access Channel: Internet and Public Praise Communication

Understanding of tourists' information access channel will be conducive to select more appropriate marketing of destination image, and know the effectiveness of various marketing channels. Channels accessible to tourism information in Yangshuo by the tourists are shown below.

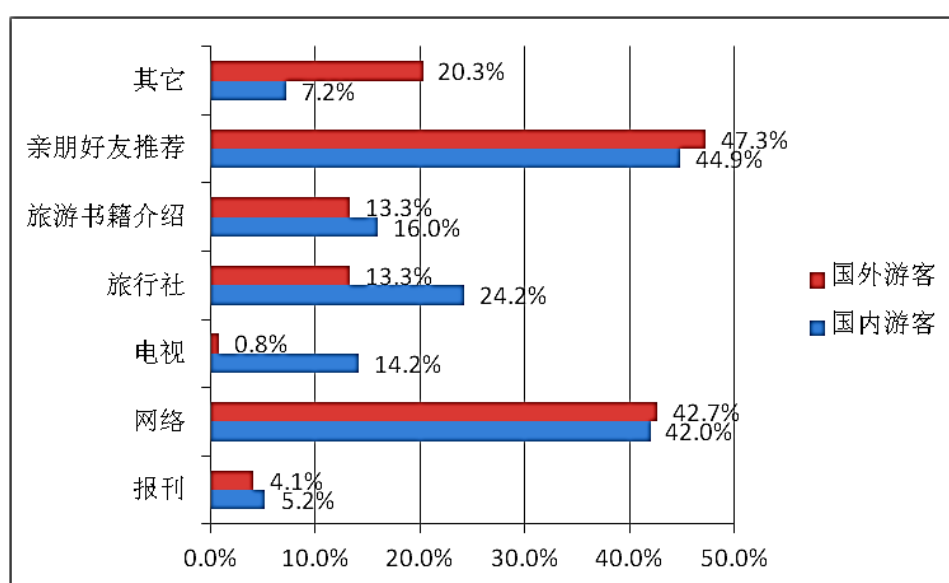


Figure 8-9 Channels accessible to tourism information by domestic and foreign tourists

It can be seen from Figure 8-9 that it is Internet and the recommendation of friends and family that access to tourism information by domestic and foreign tourists. In addition, travel agencies and books play a more important role too. It is big difference that obviously domestic tourists access more information from television which fewer foreign tourists are accessible to, indicating that domestic TV introduction has played a certain role in imaging tourist destination, Yangshuo, while less promotion is found in foreign television programs. Also, foreign tourists have accessed to tourism information from more channels, and through interviews and text descriptions, "Lonely Planet" or other travel guides will be ideal.

Overall, how to access to tourism information is diversified and focused, especially in the communication of public praise, and websites and travel guides, and therefore, it is particularly important for the marketing of Yangshuo destination to pay attention to the development of tourism products and services, destination image maintenance and guaranteed good public praise effect.

8.2.4.2 Desirable Information: Basic Information like Attractions and Accommodation

Figure 8-10 shows that attractions introduction will be the most desirable information for domestic and foreign tourists, followed by accommodation information, both of which are the most basic information, absolutely necessary for all tourists, so it is required to make such information informed to the tourists through channels.

Differences between domestic and foreign tourists are reflected in transportation, catering, cost and culture. Why domestic tourists pay more attention to the information regarding the transportation, catering and cost may lie in more short-haul self-drivers, and the concern about catering may possibly be due to the desire of domestic tourists to more distinctive local restaurants, while it is easier for foreign tourists to find Chinese food, different from their own dishes. In addition, it is average income level in China that makes domestic tourists more concerned about the costs in the destination. Foreign tourists focus more on the culture than domestic tourists.

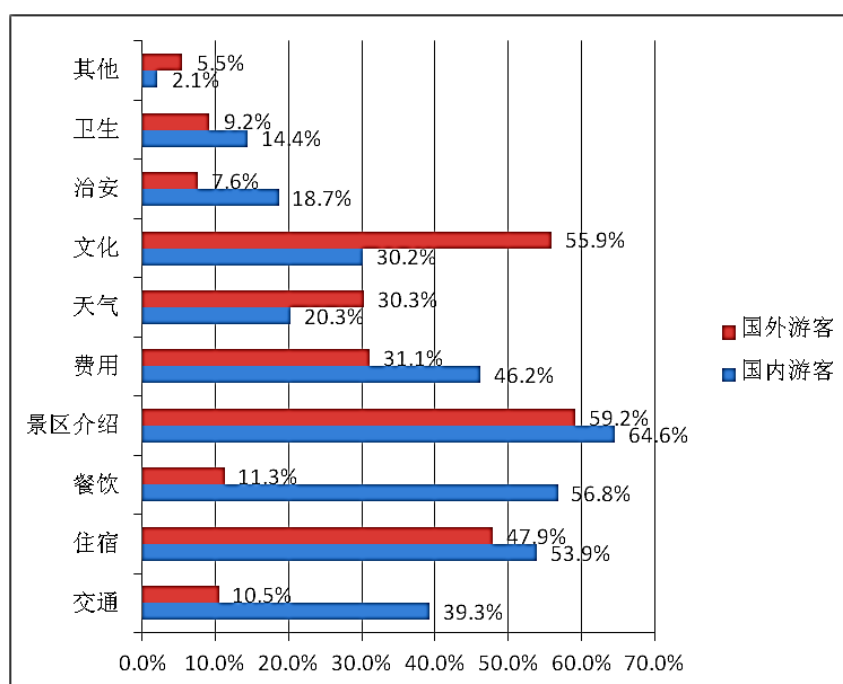


Figure 8-10 Information desired by the tourists

8.3 Summary of the Chapter

Through the questionnaires, field investigation and interviews, the task force has monitored the conditions of tourism products and services in Yangshuo, reflected in the tourists' expectation

of products and services, consumer characteristics, feedback as well as objective development of products and services.

8.3.1 Concentrated Tourism Motivation with Desiderated Diversification Improvement

It is sightseeing and leisure that motivate the tourists in Yangshuo, in both high proportion, but the tourists only select 1-3 days stay. On the other hand, there is still a large space to improve the diversification of tourism products and services in Yangshuo, and then it is temporarily unable to attract more attention from various types of the tourists, but it is notable that, the motivation of adventure, rock climbing and photography will be possibly developed to enrich local diversity.

8.3.2 Welcomed Tourism Products with Local Characteristics

Handcraft and specialty food with cultural features prevail, no matter in the shops attractive to the tourists or tourism commodities purchased by the tourists. Why the tourists purchase such products focuses on the souvenirs or gifts, requiring that tourism commodities are certainly local and culture-oriented to meet the needs of the tourists. Pub culture in Yangshuo is still concerned by most of the tourists, which, in fact, has become one of local culture features.

8.3.3 Attractiveness Maintained by Landmark Attractions and Visibility Improvement of Other Attractions

It is found through the survey that the landmark attractions like West Street and Lijiang River are still very attractive to most of the tourists, while the followings including Yulong River and Moon Hill are gradually visible. Some public attractions artificially created and constructed, like Butterfly Spring, Big Banyan Tree and Ancient Guilin Show are selected by more domestic and foreign tourists. In addition to independent traveler or tour group, more attention shall be paid to internal cause to understand the needs of the tourists.

8.3.4 Improved Service Facilities and Reasonable Regional Distribution

Rich service facilities in Yangshuo county can greatly satisfy the needs of tourists and residents, reasonably distributed, for example, the area with strong commercial feature and high

concentration of the tourists, resident-concentrated area, as well as mixing area of residents and tourists, so that tourism development does not bring too much negative impact on the residents.

8.3.5 Important Communication of Internet and Public Praise and Focus on Tourism Information Transfer

The survey shows that it is Internet and friends' recommendation that make the tourists accessible to tourism-related information, and attractions introduction will be the most desirable information for the tourists. So importance shall be attached to such channels and information used in the promotion of tourist destination image of Yangshuo.

Chapter IX Conclusion

Through the analysis of first-hand data and second-hand material obtained in field monitoring survey this year, compared with the data in previous years (2006-2012), the following conclusions are shown:

9.1 Increased Awareness of Tourism Engagement by Community Residents, but in Limited Mode

90.9% of the interviewed residents expressed the support for Yangshuo tourism, while most of the residents highly satisfied the development of local tourism, and considered that the tourism will be conducive for the locals and benefit them accordingly. The residents had clear perception of positive and negative impacts of tourism development, i.e. a certain positive impact on promoting economic development, cultural exchange and handicraft development, and a negative impact on the inflation, increased housing prices and environmental pollution. This shows that the awareness of tourism engagement by community residents increases. Resident engagement is limited, even with lower engagement, just because of the following reasons, such as lower education, imperfect tourism career development, inadequate grasp of practical advice and decision-making power, difficult access to government information, and narrow view channels. In particular, at this stage, less attention has been paid to vulnerable residents in Yangshuo tourism, embodied in the insufficient subsidies for elderly and disabled population.

9.2 Transition of Traveling Mode for Domestic and Foreign Tourists but with Large Differences in Travel Experience

As the tourism in Yangshuo is gradually mature, along with less mass tourism, other alternative modes emerge. There are more and more new tourists interested in wild adventure and photography, and also more foreign tourists visiting family and friends and learning Taiji and Chinese. A better tourist experience is mainly reflected in the satisfaction of natural resources, along with a higher willingness of revisiting and recommendation. But most of the remaining

satisfaction indicators are not high, mainly reflected in poor homogenization competitiveness of designed tourism products and services, poor local custom resource, inadequate protection of cultural landscape resources, poor water quality, lower tourism price transparency, poor catering service, less accessible transportation, less entertaining and shopping services, as well as big noise etc., especially lower complaint handling. A big difference between domestic and foreign tourists is mainly reflected in travel mode, spending power and ideas, tourism expectations, recommendation willingness, the satisfaction of the transportation, catering and service along with the perception of water quality in Lijiang River.

9.3 Higher Attraction of Natural Resources and Desiderated Improvement of Tourism Transportation

It is Yangshuo scenery that, as core tourism resource, attracts domestic and foreign tourists, and it is required in related planning and control of urban development to firmly perform better protection and development of natural resources, strengthen the construction of secondary core attractions including cultural customs, community residents, local building, and local tour guides. It is road traffic pressure that still challenges, to largest extent, current tourism transportation planning in Yangshuo. Among them, on one hand, it is required to improve tourism transportation based on tourist preference, reflected in the improvement of the pavement and cycle track; on the other hand, initiative guidance will be required to realize effective diversion and management of the tourists through rational planning, improvement of effective and multi-level transportation system and the development of multiple tourism resources throughout the region. In addition, at this stage, a trend of increasing tourism land in Yangshuo has emerged; on the premise of unbalanced development, local government shall flexibly prepare land planning to rationally and effectively allocate and use the land based on the characteristics of different towns.

9.4 Tourism Promotion for Local Economic Development and Great Ripple Effect from Tourism Industry

Tourism industry in Yangshuo has contributed more than 65% in GDP, with significantly higher rate than other industries since 2004. Tourism industry has played an important role in financial contribution, jobs and investment attraction. In particular, it has also played an

important role in leading to the development of education and training industries, promoting local marketing of agricultural products, and supporting local handicraft industry in Yangshuo.

9.5 Increased Competition among Small Tourism Enterprises and Independent Change of Tourism Commercial Activities

With rapid development of tourism industry in Yangshuo, tourism-related enterprises were continuously stationed, and the competition among enterprises increased. Independent change of commercial activities has been caused due to competitive behavior, tourist preference and rental, reflected in the service transfer from the residents to the tourists in the functions of overall commercial shops in Yangshuo in recent years, but due to the demand of recreation and shopping by the tourists, tourism-related shop type has been changed from the service like eating and living to leisure and recreation, and then the facts that the tourists gather towards tourist center and the residents leave core area, away from the tourists have further promoted the change of commercial activities.

9.6 Rental Impact on Stable Operation of Small Business and Employee-Concerned Wages and Benefits

Business owners in Yangshuo County are optimistic about tourism investment potential, and generally satisfy living environment in Yangshuo, but more than 60% owners are not satisfied with operating status, with high rental as a major obstacle, which further affects operating stability. As the perception of the owners to sustainable tourism development is not enough, mass media and government promotion are required to facilitate the channels.

According to the survey, it is middle and high in employee satisfaction, where interpersonal relation and work environment are satisfactory, but working benefit (wages, bonuses, vacation, promotion) is most unsatisfied, while the wages for more than 60% employees are between RMB 1000 to 2000 Yuan. The reason is not only because of generally low wages, less vacation in peak season and tight pyramid organizational structure in tourism enterprises, but also related to small businesses and lack of promotion in Yangshuo. Why almost half of the employees choose to work in Yangshuo lies in its environment, for a desirable lifestyle in Yangshuo. However, such employees, willing to accept lower wage to pursue a lifestyle, are characterized at very high drain.

In addition, government and public service organizations provide less employment assistance, and it is required to broaden the channels of employment information to increase employment rate. The requirements for English in Yangshuo tourism industry will be promotive with English learning of the employees who realize the importance of English proficiency.

9.7 Overall Health and Safety Image and Gradually Formed Environment-Friendly Destination

The vast majority of the tourists and residents clearly feel that, tourism development will inevitably bring the air, water, noise and waste pollution to local environment, along with instable society and impact on local culture due to the inflows of foreign population, but they also consider that it has brought about effective management to cope with these issues effectively and even realize better future than before. Among them, the renovation of urban and rural environment in Yangshuo achieves a huge success and is well praised by people, which makes effective waste treatment. In addition, the government and relevant departments have formulated the specifications and corrective measures for food security and public environment security. Currently the air quality in Yangshuo is significantly improved, but water pollution still exists, and urban noise pollution is serious; health and safety conditions are basically good.

94.5% of the interviewees believe that it is important to protect natural environment. Although a tourist destination trend, environment-friendly, healthy and safe, has basically emerged in Yangshuo, it is still required to pay sufficient attention to noise pollution control, water pollution treatment, sustainable development education to tourism business owners, especially energy-saving awareness education, as well as energy-saving measures of tourism enterprises.

9.8 Upgrade and Transformation of Tourism Products and Further Improvement of Supporting Tourism Facilities

It is required to provide more diversified tourism products based on motivation difference of the tourists, and then achieve the upgrade of tourism product through the transformation of traveling mode to high-level, featured and more diverse direction. As for the difference between domestic and foreign tourists, it is required to design and market the products well. As landmark

attractions and local unique tourism commodities are still attractive, which will be taken as main impression in Yangshuo tourism industry by the tourists, it is critical to effectively manage and design them. For other tourism products, local characteristics and travel experience shall be required, and the business concepts, fake and inharmonious, shall be abandoned. In the new era, it is very important for good product and service quality communicated in Internet and public praise, and it is effectively attractive to the tourists to revisit and recommend. In addition, overall tourist facilities and services in Yangshuo are rich and reasonably distributed, towards regional distribution, but it is required to further plan scientific and rational development in the future.

Appendixes

Questionnaire of Yangshuo Sustainable Tourism Development

(For tourists)

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, doing a research about the sustainable tourism development of Yangshuo. The result is for academic research only, and won't be used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation. Thank you very much for your support!

Including this time, **how many times** have you been to Yangshuo _____

You came to Yangshuo as:

A. Independent traveler B. Joining a tour group on your own C. Joining a tour group with friends or families D. Joining a tour organized by your work organization E. During a conference F. Else _____

How many **companions** with you came to Yangshuo _____

Where did you get **information about Yangshuo?** (Multiple choices accepted)

A. Newspapers and magazines B. Internet C. TV D. Travel agency
E. Tour Brochure F. Friends and relatives G. Else _____

What is your **motivation** to come to Yangshuo? (Multiple choices accepted)

A. Relax B. Take joy & risks C. Take activities D. Want changes or escape E. Education & learning F. Know geographic knowledge G. Social factors H. Weather
I. Culture and food J. Else _____

How did you come to Yangshuo? (Multiple choices accepted)

A. Self-driving B. Coaches C. Taxi D. Boat E. Sightseeing tour bus F. Walk G.
Else _____

How did you travel in Yangshuo during your stay (Multiple choices accepted)

A. Self-driving B. Bike C. Taxi D. Boat E. Sightseeing tour bus F. Walk G.
Else _____

How long do you plan to stay in Yangshuo?

A. 1-3 days B. 4-7 days C. 7-15 days D. Over 15 days

Where do you live?

A. Family hotel B. Youth hostel C. Star Hotel D. Else _____

What's your travel budget per person? (personal cost)

A. <500 Yuan B. 500-1000 Yuan C. 1000-1500 Yuan D. 1500—2000 Yuan
E. >2000 Yuan

So far, how much did you spend on following parts? (personal cost RMB/Yuan)

Transportation _____ Yuan Catering _____ Yuan Entertainment _____
Yuan Shopping _____ Yuan Accommodation _____ Yuan Else _____
Yuan

Which impresses you most?

A. Natural scenery B. Unique humanistic feelings C. Recreational atmosphere D.
Hospitable people E. Nothing

You are going to visit: (Multiple choices accepted)

☐ West Street ☐ Lijiang River ☐ Painted hill of nine horses ☐ Scenery on the 20 Yuan note
☐ Camel crossing the river ☐ Butterfly Fountain ☐ Totem Trail ☐ Jianshan Temple

☐Big Banyan Tree ☐Yulong River ☐Moon Hill ☐Longjing River Drifting Resort
☐Yangdi Scenic Area ☐Peach Resort ☐Impression Liu Sanjie Show ☐Fuli Town
☐Else_____

What shop in West Street are you most interested in? (Multiple choices accepted)

A. Hotel & guesthouse B. Pub and western restaurant C. Apparel store D. Handcraft shop
E. Specialty shop F. Chinese health care shop G. Chinese restaurant H. Travel agency,
tourist consulting service and ticket agency I. Foreign language school J. Else_____

Does Yangshuo meet your expectation?

A. Exactly meet B. Generally meet C. Faire D. Less than expectation
D. Bad

Will you visit Yangshuo again? A. Yes B. No C. Not sure

Will you recommend to Yangshuo friends or relatives? A. Yes B. No C. Not sure

Please draw “√” on the appropriate option depending on you travel experience:

		Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Tourism resources	View in scenic pots is beautiful	5	4	3	2	1
	Environment is clean	5	4	3	2	1
	Traffic is crowded	5	4	3	2	1
	Ticket price of scenic spots is reasonable	5	4	3	2	1
	Cultural landscape has local amorous feelings	5	4	3	2	1
	Water quality of Lijiang	5	4	3	2	1

	River is high					
	Water quality of Yulong River is high	5	4	3	2	1
Tourism services	Health quality of catering and accommodation is high	5	4	3	2	1
	Service of hotel and restaurant staff is good	5	4	3	2	1
	Service of interpretation in attractions is good	5	4	3	2	1
	Service of souvenir shop staff is good	5	4	3	2	1
Tourism environment	Local security is good	5	4	3	2	1
	Traffic condition is good	5	4	3	2	1
	Air condition is good	5	4	3	2	1
	Noise pollution is little	5	4	3	2	1
	Local residents are friendly	5	4	3	2	1
	Price of catering and accommodation is reasonable	5	4	3	2	1
	Price of transportation is reasonable	5	4	3	2	1
	Price of tourism products is reasonable	5	4	3	2	1
	Price of entertainment is reasonable and amount is abundant	5	4	3	2	1
Else	Goods have lots of local	5	4	3	2	1

	characteristics					
	Commercialization is too much	5	4	3	2	1
	I'd like to accept local tour guide service in the street	5	4	3	2	1
	The overall I is satisfied	5	4	3	2	1

Have you watched the performance “Impression Liu Sanjie” in person ☐Yes ☐No
(Please jump to NO.21 directly)

What “Impression Liu Sanjie” impresses you most?

A.Stage B.Light C.Local costume D.Dance E.Sing F.Liu Sanjie
G.Actors H.Else_____

Are you agree with the following (tick “√”where you agree)	Agree	Disagree
During watching, I concerned about the story of Liu Sanjie most		
During watching, I concerned about the performance in stage most		
After return, I will get further understanding of the story of Liu Sanjie		
The performance reveals the living condition of local residents		

On what aspects do you think Yangshuo need to **improve** for tourism development?

Please fill in the next questions, and your personal information will be kept confidentially.

Gender: A. Male B. Female **Place of your residence (Country):** _____

Age: A.<18 B.18-24 C.24-35 D.35-45 E.45-60 F.>60

Your educational level: A. Primary school B. Junior middle school C. Senior middle school or technical secondary school D. Junior college E. Bachelor F. Higher than bachelor

Your income per month: A. <1500 Yuan B.1501-2500 Yuan C.2501-4000 Yuan
D.4001—6000 Yuan D.>6000 Yuan

Questionnaire of Yangshuo Sustainable Tourism Development

(For foreign tourists)

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, doing a research about the sustainable tourism development of Yangshuo. The result is for academic research only, won't be used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation.

Thank you very much for your support!

1. Including this time, how many times have you been to Yangshuo _____

2. You came to Yangshuo as

A. Independent traveler B. Joining a tour group on your own C. Joining a tour group with friends or families D. Joining a tour organized by your work organization E. During a conference F. Else _____

3. How many companions with you came to Yangshuo _____

4. Where did you get information about Yangshuo? (Multiple choices accepted)

A. Newspapers and magazines B. Internet C. TV D. Travel agency
E. Tour Brochure F. Friends and relatives G. Else _____

5. What is your motivation to come to Yangshuo? (Multiple choices accepted)

A. Relax B. Take risks C. Take activities D. Want changes E. Education F. Know geographic knowledge G. Social factors H. Weather I. Culture and food J. Else _____

6. How did you come to Yangshuo?

A. Self-driving B. Coaches C. Taxi D. Boat E. Sightseeing tour bus F. Walk G.
Else _____

7. How did you travel in Yangshuo during your stay(Multiple choices accepted)

A. Self-driving B. Bike C. Taxi D. Boat E. Sightseeing tour bus F. Walk G.
Else _____

8. How long do you plan to stay in Yangshuo?

A. 1-3 days B. 4-7 days C. 7-15 days D. Over 15 days

9. Where do you live?

A. Family hotel B. Youth hostel C. Star Hotel D. Else _____

10. What's your travel budget per person?

A. <300 Yuan B. 300-600 Yuan C. 600-1000 Yuan D. 1000—2000 Yuan
E. >2000 Yuan

11. So far, how much did you spend on following parts? (RMB/Yuan)

Transportation _____ Yuan Catering _____ Yuan Entertainment _____
Yuan Shopping _____ Yuan Else _____ Yuan

12. Which impresses you most?

A. Natural scenery B. Unique humanistic feelings C. Recreational atmosphere D.
Hospitable people E. Nothing

13. You are going to visit: (Multiple choices accepted)

☐ West Street ☐ Lijiang River ☐ Painted hill of nine horses ☐ Scenery on the 20 Yuan note
☐ Camel crossing the river ☐ Butterfly Fountain ☐ Totem Trail ☐ Jianshan Temple
☐ Big Banyan Tree ☐ Yulong River ☐ Moon Hill ☐ Longjing River Drifting Resort
☐ Yangdi Scenic Area ☐ Peach Resort ☐ Impression Liu Sanjie Show ☐ Fuli Town
☐ Else _____

14. What shop are you most interested in?

A. Hotel B. pub and western restaurant C. Souvenir shop D. Chinese health care shop
 E. Chinese restaurant F. Travel agency G. Foreign language school H. Else_____

15. Does Yangshuo meet your expectation?

A. Exactly meet B. Generally meet C. Higher D. Lower

16. Will you visit Yangshuo again?

A. Yes B. No C. Not sure

17. Will you recommend to Yangshuo friends or relatives?

A. Yes B. Not C. No sure

18. Please draw “√” on the appropriate option depending on your travel experience

		Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Tourism resources	View in scenic spots is beautiful	5	4	3	2	1
	Environment is clean	5	4	3	2	1
	Traffic is crowded	5	4	3	2	1
	Ticket price of scenic spots is reasonable	5	4	3	2	1
	Cultural landscape has local amorous feelings	5	4	3	2	1
	Water quality of Lijiang River	5	4	3	2	1

		Strongly agree	Agree	Neutral	Disagree	Strongly disagree
	is high					
	Water quality of Yulong River is high	5	4	3	2	1
Social services	Health quality of catering and accommodation is high	5	4	3	2	1
	Service of hotel and restaurant staff is good	5	4	3	2	1
	Service of interpretation in attractions is good	5	4	3	2	1
	Service of souvenir shop staff is good	5	4	3	2	1
Tourism environment	Local security is good	5	4	3	2	1
	Traffic condition is good	5	4	3	2	1
	Air condition is good	5	4	3	2	1
	Noise pollution is little	5	4	3	2	1
	Local residents are friendly	5	4	3	2	1
	Price of catering and accommodation is reasonable	5	4	3	2	1
	Price of transportation is reasonable	5	4	3	2	1
	Price of tourism products is reasonable	5	4	3	2	1
	Price of entertainment is reasonable and amount is abundant	5	4	3	2	1
Else	Goods have lots of local characteristics	5	4	3	2	1

		Strongly agree	Agree	Neutral	Disagree	Strongly disagree
	Commercialization is too much	5	4	3	2	1
	I'd like to accept local tour guide service in the street	5	4	3	2	1
	The overall I am satisfied	5	4	3	2	1

19. Have you watched the performance “Impression Liu Sanjie” in person

☐ Yes ☐ No (Please jump to NO.21 directly)

20. What “Impression Liu Sanjie” impresses you most?

A. Stage B. Light C. Local costume D. Dance E. Sing F. Liu Sanjie G. Actors
H. Else _____

Are you agree with the following (tick “√” where you agree)	Agree	Disagree
During watching, I concerned about the story of Liu Sanjie most		
During watching, I concerned about the performance in stage most		
After return, I will get further understanding of the story of Liu Sanjie		
The performance reveals the living condition of local residents		

21. On what aspects do you think Yangshuo need to improve for tourism development?

Please fill in the next questions, and your personal information will be kept confidentially.

1. Gender: A. Male B. Female **Place of your residence (Country):** _____

2. Age: A. <18 B. 18-24 C. 25-35 D. 36-45 E. 46-60 F. >60

3. Your educational level:

A. Primary school B. Junior middle school C. Senior middle school or technical secondary school
D. Junior college E. Bachelor F. Higher than bachelor

4. Your income per month:

- A. <1500 Yuan B.1501-2500 Yuan C.2501-4000 Yuan C.4001—6000 Yuan
D.>6001 Yuan

Questionnaire of Yangshuo Sustainable Tourism Development

(For residents)

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, doing a research about the sustainable tourism development of Yangshuo. The result is for academic research only, and won't be used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation. Thank you very much for your support!

1. Please tick the appropriate option with “√” based on your perception and satisfaction of the impact of tourism development in Yangshuo.

[5 for strongly agree, 4 for agree, 3 for no impact, 2 for disagree, and 1 for strongly disagree.]

		Strongly disagree	Disagree	No impact	Agree	Strongly agree
A	Tourism is good to our local development	1	2	3	4	5
B	I can benefit from tourism	1	2	3	4	5
C	Tourism industry brings about the following impact to the locals:					
	Tourism development has brought more job opportunities to	1	2	3	4	5

us					
Tourism development has created more job opportunities for local youth	1	2	3	4	5
I'm satisfied with my income	1	2	3	4	5
Tourism industry attracts more investment and spending	1	2	3	4	5
Tourism development has led to price rise	1	2	3	4	5
Tourism development has led to increased housing price	1	2	3	4	5
Tourism has improved living standard greatly	1	2	3	4	5
Tourism has increased crime rate	1	2	3	4	5
Tourism has disturbed our former lives	1	2	3	4	5
Tourism has damaged moral standards	1	2	3	4	5
I'm limited to use the resources in scenic spot	1	2	3	4	5
Tourism has improved infrastructure greatly	1	2	3	4	5
Tourism has improved medical facilities and services greatly	1	2	3	4	5
Demolition and new construction	1	2	3	4	5
Tourism promotes cultural exchanges between the locals and outsiders	1	2	3	4	5
Local folklore and traditional	1	2	3	4	5

culture are destroyed and forgotten					
Local festivals and activities increase	1	2	3	4	5
More people participate in the promotion of traditional culture	1	2	3	4	5
Tourism promotes local crafts	1	2	3	4	5
Tourism has exacerbated traffic crowding	1	2	3	4	5
Tourism has led to aggravated air pollution	1	2	3	4	5
Tourism has led to aggravated water pollution	1	2	3	4	5
Tourism has led to aggravated noise pollution	1	2	3	4	5
Tourism has led to more solid wastes	1	2	3	4	5
Hotel and other tourism facilities damage the scenery	1	2	3	4	5
Protection of natural environment is important in my opinion	1	2	3	4	5
I'm willing to provide advice on local tourism	1	2	3	4	5
Some decisions of the scenic zone incorporate our advice	1	2	3	4	5
I access to related information about policies and guidelines implemented by the government	1	2	3	4	5

	I'm satisfied with the implementation by the government	1	2	3	4	5
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2. What do you think about the satisfaction of tourism development in Yangshuo?

A. Strongly unsatisfied B. Unsatisfied C. Satisfied D. Good E. Very good

3. Will you continue to **support tourism development in Yangshuo?**

A. Strongly disagree B. Disagree C. Neutral D. Agree E. Very agree

4. For local tourism development, what is mostly changed? What's your most concern?

5. What is your suggestion about tourism development in the place where you live?

6. Do you know what sustainable tourism development is? If so, how do you feel it?

Please fill in the next questions, and your personal information will be kept confidentially.

1. Gender: A. Male B. Female **2. Nationality:** ____

3. Age: A. <15 B. 15-24 C. 25-44 D. 45-60 E. >60

4. Place of your residence: ____ Township /town ____ Village

5. Your educational level: A. Primary school and below B. Junior middle school C. Senior middle school or technical secondary school D. Junior college or Bachelor E. Master or Higher

6. Have you learnt English in your extra time? A. Yes B. No

7. What do you do? _____ **A. Full time B. Part time**

What is your working hour: _____ **Where do you work:** _____

8. How much do you earn per month?

A. <1000 Yuan B. 1001-2000 Yuan C. 2001-3000 Yuan D. 3001—5000 Yuan
E. 5000-10000 Yuan F. >10000 Yuan

9. Your monthly income: _____ **(Proportion accounting for total family income:**
_____%)

10. How long do you live in local residence: A. <1 year B. 1-3 years C. 4-6 years D. 7-10 years E. 10 years or more

Thanks for your cooperation!

Questionnaire of Yangshuo Sustainable Tourism Development (For employees)

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, doing a research about the sustainable tourism development of Yangshuo. The result is for academic research only, and won't be used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation.

Thank you very much for your cooperation and support! Wish you a happy life!

1. Please draw “√” on the appropriate option: (5 for strongly agree, 1 for strongly disagree)

	Strongly agree	Agree	Neutral	Disagree	Strongly disagree
I'm satisfied with my salary	5	4	3	2	1
I'm satisfied with bonus system	5	4	3	2	1
I'm satisfied with current vacation system	5	4	3	2	1
Challenging job	5	4	3	2	1
The supervisor can objectively evaluate subordinate performance	5	4	3	2	1
The supervisor can assist and guide me in case of the difficulties	5	4	3	2	1
Educational background prevails in recruitment and promotion	5	4	3	2	1
I can expect my promotion	5	4	3	2	1
I can be cooperative with other colleagues	5	4	3	2	1
I can exchange and communicate well with other colleagues	5	4	3	2	1
I can be supported by my family	5	4	3	2	1
The enterprise's regulations can be effectively carried out	5	4	3	2	1

The enterprise has clearly developed the duties of the departments	5	4	3	2	1
I clearly understand the management of the enterprise	5	4	3	2	1
I clearly understand development objective developed by enterprise management	5	4	3	2	1
Short-term management objective developed by the enterprise can be effectively carried out	5	4	3	2	1
I'm satisfied with comfortable work place	5	4	3	2	1
Beautiful environment in scenic spot will improve working efficiency in my opinion	5	4	3	2	1

1. Are you **satisfied with your job**?

A. Strongly satisfied **B.** Satisfied **C.** Fair **D.** Unsatisfied **E.** Strongly unsatisfied

2. Is this your **first job** in Yangshuo?

A. Yes **B.** No, this is ____

3. **Why** do you choose to work here?

A. Beautiful environment for a lifestyle **B.** Make a living **C.** Else_____

4. Do you think there are **more job opportunities** as you require in Yangshuo?

A. Yes **B.** No

5. Do you plan to work **outside**?

A. Yes, I'm planning to leave in____ (year) **B.** No

6. Do you plan to **divert your job**?

A. Yes, I'm planning to divert my job in____ (year) **B.** No

7. Do you plan to **establish your own career**?

A. Yes, I'm planning to establish your own career in ____ (year) B. No

8. Have you **learnt English** in your extra time?

A. Yes B. No

Please fill in the next questions, and your personal information will be kept confidentially.

1. **Gender:** A. Male B. Female

2. **Age:** A. 18-25 B. 25-44 C. 45-64 D. >65

3. **Nationality:** A. Zhuang B. Han C. Else ____ (Please complete);

4. **Are you a local?**

A. Yes, I've lived here for ____ (year) B. No

5. **If you are not a local, where are you from:**

A. This county B. Guilin City C. In Guangxi D. Other places in the country _____

6. **Your educational level:**

A. Primary school B. Junior middle school C. Senior middle school or technical secondary school D. Junior college or Bachelor E. Master or Higher

7. **Your income per month:**

A. <1000 Yuan B. 1001-2000 Yuan C. 2001-3000 Yuan D. 3001—5000 Yuan E. 5001-10000 Yuan F. >6000 Yuan

8. **Do you have other income sources except for this job?**

9. Your monthly income: _____(Proportion accounting for total family income: _____%)

Thanks for your cooperation!

Questionnaire of Yangshuo Sustainable Tourism Development

(For owners)

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, doing a research about the sustainable tourism development of Yangshuo. The result is for academic research only, and won't be used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation. Thank you very much for your support!

1. Where does your enterprise locate? _____What is your enterprise name?

2. What is your business scope?

☐ **Accommodation:** ① Hotel ② Guest house ③ Family inn ④ Else

☐ **Catering:** ① Ordinary restaurant ② Local delicacies ③ Western restaurant, bar or café shop ④ Cold drink shop ⑤ Stall ⑥ Else;

☐ **Entertainment:** ① Song & Dance hall ② Kara-Ok ③ Else;

☐ **Commodity sales or production:** ① Souvenir ② Book and video ③ General merchandise ④ Apparel ⑤ Else;

☐ **Rent:** ① Transportation facility ② Outdoor tools, like climbing gear and bike ③ Else;

☐ **Travel agency:** ① Tour guide ② Ticket booking ③ Room booking ④ Else;

☐ **Management of tourism item (scenic spot), like_____;**

☐ **Beauty treatment and hair dressing;** ☐ **Picture development;**

☐ **Else _____ (completed by task force)**

1. Your products (or services) are characterized at:

A. Local B. Western C. Else_____

2. What is your business peak season? From__ to__ (month).

3. Have you hired some **employees**?

A. Yes **B.** No

If so, how many employees are there (); how many in **peak and slack seasons** respectively (); how many **female employees** are there ().

4. What do you **focus** on in the recruitment? (**Please list three or four items**)

5. **Educational level** of the employees:

A. Primary school **B.** Junior middle school **C.** Senior middle school or technical secondary school **D.** Junior college or Bachelor **E.** Master or Higher

6. Are the employees **trained/educated** before they work?

How does the training/education work? _____. If so, **how many** trained employees are there in total number_____.

What is trained? _____

7. How many **locals** are there in the employees? _____.

8. **Why** do you choose here to open a shop? **A.** Beautiful environment for a lifestyle **B.** Make a living **C.** Else_____

9. What is the **largest impact** on your management? _____(Multiple choices accepted).

A. Rental **B.** Employee's salary **C.** Goods cost **D.** Competition from other companies **E.** Low tourist spending **F.** High tax

10. Please draw “√” on the appropriate option on whether you agree with the description of Yangshuo

	Strongly disagree	Disagree	Fair	Agree	Strongly agree
It is safe in Yangshuo	1	2	3	4	5
It is a tourist destination worthy of investment	1	2	3	4	5
I'm satisfied with the leisure in Yangshuo in my extra time	1	2	3	4	5
Commercial feature is too strong in my opinion	1	2	3	4	5
West Street attraction is declining to the tourists	1	2	3	4	5

11. What **ownership pattern** does your business belong to?

A. Private **B.** Family business **C.** Two or more shareholders **D.** Chain

12. If the establishment is leased, how much is the **rental per month**? RMB _____Yuan. How many years do you lease for?

13. Does your business take measures to **save energy/water resources**?

A. Yes, like _____ **B.** No, but planned **C.** No, not planned for now

14. **Why** does your business take (or no) measures to save energy/water resources?

15. Do you know what “**sustainable tourism development**” is?

A. Totally **B.** A little **C.** Basically no **D.** Totally no

If so, **where** do you get such information: **A.** Promotion from the government

B. Media promotion (TV, broadcasting, newspaper and magazines etc.) **C.** Specialized agencies

D. Else_____

16. What is your **view or suggestion** for tourism development in the future in Yangshuo?

Please fill in the next questions, and your personal information will be kept confidentially.

1. Gender: A. Male B. Female;

2. Age: A. 15-24 B. 25-44 C. 45-64 D. >65

3. Nationality: A. Zhuang B. Han C. Else ____ (Please complete);

4. Are you a local? A. Yes B. No

5. If you are not a local, where are you from: A. This county B. Guilin City C. In Guangxi D. Other places in the country ____

6. Your educational level: A. Primary school B. Junior middle school C. Senior middle school or technical secondary school D. Junior college or Bachelor E. Master or Higher

7. Your income per month: A. <1000 Yuan B. 1001-2000 Yuan C. 2001-3000 Yuan
D. 3001—5000 Yuan E. 5001-10000 Yuan F. 10001—30000 Yuan G. 30001—50000 Yuan H. >50000 Yuan

8. Do you have other income sources except for the management of small tourism enterprise?

Thanks for your cooperation!