

喀纳斯景区旅游可持续发展

监测报告

喀纳斯景区管理委员会

联合国世界旅游组织旅游可持续发展观测点管理与监测中心

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1 前言

本年度针对喀纳斯旅游可持续发展的监测共历时 12 天，从 2013 年 9 月 14 日始至 9 月 25 日结束，联合国世界旅游组织旅游可持续发展观测点管理与监测中心（下简称监测中心）在喀纳斯管理委员会的积极配合下，完成了对喀纳斯的可持续发展指标的监测。本次监测小组成员共 9 人，其中 1 名老师、5 名博士、3 名硕士共 9 人，监测小组分为游客、政府、社区以及企业四个小组，先后在喀纳斯机场、贾登峪门票站、喀纳斯湖区、喀纳斯游客中心、白哈巴村、铁列克提乡等主要景点及游客停留节点对游客进行了随机调查；在喀纳斯村、白哈巴村、铁列克提乡进行了社区居民入户访谈调查；在贾登峪、喀纳斯村、白哈巴、铁列克提进行了旅游企业调查，还走访了喀纳斯景区管理委员会，铁列克提乡政府，白哈巴村村委等相关部门，收集喀纳斯景区相关的二手资料。

本次监测过程中收集了大量关于游客、社区居民、旅游企业及当地政府的一手资料。游客方面，共发放问卷 680 份，其中有效问卷 633 份，有效率 93.1%，在发放问卷的同时对部分游客、导游进行关键问题访谈以辅助分析；社区居民方面，共访谈社区居民 56 户，包括了喀纳斯景区内最主要喀纳斯新村和老村、白哈巴村以及铁列克提乡乡集镇共 3 个社区，主要采用入户深入访谈和半结构式问卷访谈方法进行社区调研；旅游企业方面，对喀纳斯 4 个社区内的主要经营形式进行抽样调查，共访谈了企业经营户 36 户，包括住宿企业、餐饮企业、纪念品商店、零售摊位。政府方面，主要在喀纳斯管委会的帮助下，收集了近些年喀纳斯区域的各类规划、工作报告、游客、社区、企业统计等各项资料。

根据所获得的资料，以及去年相关监测情况，本年度监测报告内容分为旅游与社区、旅游经济收益、游客满意度、旅游产品和服务、旅游规划与控制、健康与安全、旅游与资源环境保护七部分。

2 旅游与社区

2.1 旅游与社区监测概况

本次社区情况监测涉及大喀纳斯旅游区的喀纳斯新村和老村、白哈巴一村和二村以及铁热克提村（乡政府驻地）共 3 个社区。由于修路交通不便，本次调查没有包含禾木村。本次调查主要采用深入访谈和半结构式问卷访谈方法进行社区调研。在进行每个社区入户调查之前，先尽可能的找社区中的 1-2 个关键人物进行深度访谈，了解社区的基本情况，之后入户调研。并针对不同旅游参与类型的社区居民进行半结构式问卷访谈，了解居民对旅游的态度和感知，本次调研共访谈社区居民 56 户，各村户数分布如下表 2-1 所示：

表 2-1 居民访谈户数情况简表

村名	户数	居民参与旅游类型	备注
白哈巴	16	租马、租房、自己经营家庭旅馆、村口摆摊、未参与旅游	
喀纳斯	28	租马、租房、自己经营家庭旅馆、经营家访、摆摊、未参与旅游	
铁热克提	12	经营家庭旅馆、手工艺制作、未参与旅游	
总计	56；这里的居民包含少量外来经营户，因为没有向导，很多时候在访谈开始时无法判断是否是外来经营户		

注：各社区的访谈户数根据社区旅游发展程度选择，如喀纳斯旅游发展较为成熟，居民意见较为不一，需要尽量采集多人意见，而铁热克提旅游发展处于初级阶段，大家意见较为一致，居民的意见比较具有代表性。

2.2 社区基本情况

本次调研的社区主要是直接参与旅游发展的社区，喀纳斯村、白哈巴村以及铁热克提村乡政府所在地。禾木村由于交通限制，可进入性差而无法调查。通过对各村关键人物访谈及二手资料整理，以获悉各村基础情况。从几个社区的基本情况来看，与去年相比并没有多大

改变：首先是居民的收入构成上，喀纳斯居民的收入还是以旅游为主，辅以牧业及其他收入，并表现出老村对旅游的依赖明显强于新村；白哈巴居民的收入还是以牧业为主，旅游为辅，但这种结构已经开始在一部分人中发生变化，旅游收入所占比重开始上升，但目前还不能替代传统产业；铁热克提村的旅游业基本属于未启动状态，所以其居民主要收入源于牧业，农业为辅。在基础设施建设上，几个村的水、电、路都是通的，但在喀纳斯新村还存在部分居民家还未通水，电压不稳定现象，冬季用水也比较困难。与去年相比，基础设施还是有一定的改进，各项工作也还在推进中。居民对医疗设施差及孩子上学不方便的不满已经比较突出。旅游发展与之前相比，基本保持一种平衡状态，但是部分居民已经开始在反省政府、景区及自己的行为。

2.3 社区参与情况

2.3.1 各社区旅游参与情况

就社区旅游参与情况而言，各社区情况不尽相同。从参与比例来看，喀纳斯老村最高，新村次之，之后是白哈巴，铁热克提村的参与情况最差。从参与方式来看，目前社区居民参与旅游主要采取以下几种：租马；租房给外地人经营；自主经营家庭旅馆（包括餐饮）；自主经营餐饮；经营家访；摆摊；零卖奶制品；制作手工艺品等，还有部分居民处于未参与状态。

调研中各社区被访对象参与情况及收入如下表 2-2：

表 2-2 各社区被访对象参与旅游情况及相应收入

参与形式	喀纳斯村（28）		白哈巴（16）		铁热克提村（12）	
	户数	年收入	户数	年收入	户数	年收入
租马	8	0.3-1.5 万	0	0.3-1.5 万	0	
租房	6	4-15 万	2	2-7 万	0	
旅馆	5	1-10 万	8	0.3-5 万	3	基本没有
餐饮	2	1 万多	2	1-2	0	
家访	2	1-3 万			0	
摆摊	3	0.5-1 万	4	0.2-0.5 万	0	

零售	2	0.2-1 万	2	0.1-0.4 万	2	0.2-2 万
手工	0		3	基本没有	2	基本没有
无	10		10	0	10	

注：零售为没有固定方式，在自己家里卖奶制品；管委为参加管委会或景区工作；

2.3.2 社区居民受教育情况

从调查中发现，牧民的受教育水平普遍不高，在受访对象中有 69.6%的受教育程度在 9 年以下，其中有 25%的受访者其受教育年限还在 6 年以下，所以他们中大多数人听不懂汉语，也基本不会说，有的只会说与听懂“你好”，“谢谢”等简单词汇。受教育年限低的居民中男性参与旅游的情况要明显好于女性。而在受教育年限超过 9 年的受访者中，基本上都以不同的方式参与到旅游中，有的开家访、有的开旅馆、有的受雇于景区管委会。所以，受教育水平低，制约了牧民参与旅游业的深度。根据访谈与调查资料整理我们也看出：牧民受教育水平越高，选择增收方式时，会选择经营水平、文化要求较高和较新的行业，而受教育水平低的，可能就会选择管委会提供的环卫工人、或是在别人的家访中参与表演但并不解说文化、或是呆在厨房为客人准备食物。

在管委会提供的资料中，我们有看到管委会对居民的培训，管委会为提高当地居民的旅游参与能力和整体素质，曾组织了一系列的旅游培训，主要包括租马培训、家庭旅馆经营培训、语言培训、手工艺培训、礼仪培训等，累计培训 3500 余人次，旅游从业人员的服务意识和水平明显提高。但是受访居民表示，在过去这一年中他们没有接受过关于旅游的任何培训，只有少数居民参加过安全防火的培训。

2.3.3 社区对旅游参与的期望

经访谈了解，大多数居民表示希望参与旅游的方式主要有：（1）经营家庭旅馆，因为家庭旅馆收入较高；（2）开家访，能够宣传本地民族文化和特色，也能获得较好收入；（3）租马，成本较低，风险不大；（4）租房，无成本便有固定收入；（5）做导游，因为导游也能挣很多的钱。

本地居民认为自身所具备的参与优势主要来自于：（1）住宿、餐饮具有本地特色，自家

有房屋；（2）对本地资源和环境更加熟悉；（3）有自己的马匹。

劣势则主要在于：（1）与游客沟通交流存在一定的语言障碍；（2）缺乏各种经营的经验和技能；（3）缺乏广阔的人脉，难以招揽到顾客。

大多数居民均表示希望参与旅游培训，尤其是语言培训和经营技术培训等，不少居民指出想要学做餐饮和导游，可见村民的主动参与意识和参与积极性正在逐渐提高。

2.4 旅游的社区影响感知

2.4.1 旅游的经济影响

从获得的问卷分析来看（如下图 2-1），本年度居民感知旅游对喀纳斯景区带来的经济影响非常明显，经济增长、就业增加、物价上涨、生活水平提高等各项均值都在 3.5 以上，社区居民明显感受到了旅游给经济生活带来的影响。而对于贫富差距扩大、只有少数人从旅游获益这样的反向选项，当地居民的态度基本持反对意见，而持支持意见的居民分析也较为客观，认为造成贫富差距扩大、少数人活跃的主要原因在于个人的能动性。对于旅游发展带来更多投资与消费这个选项，居民基本态度都持中立，认为投资是政府的事情，感知较弱。

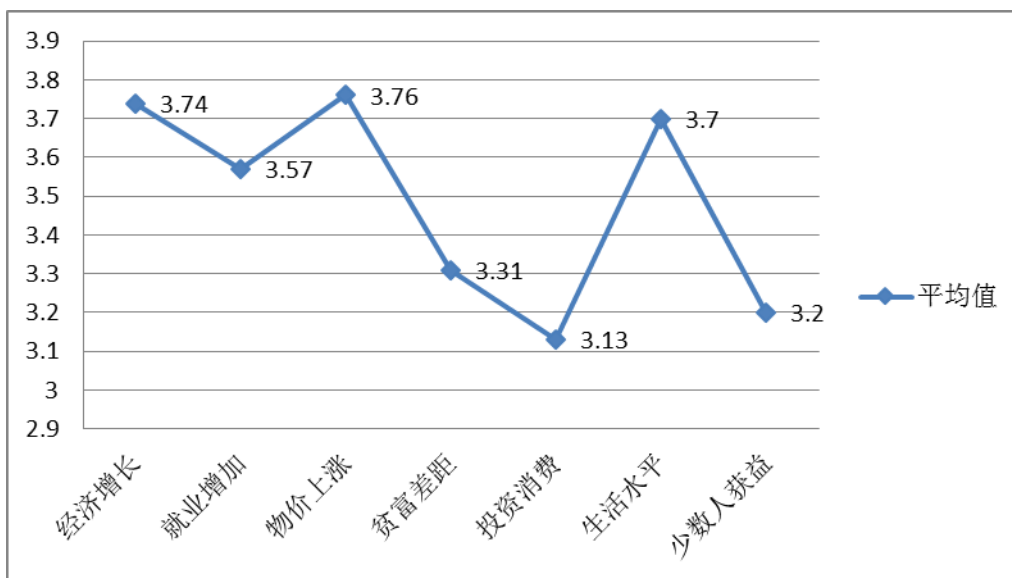


图 2-1 居民经济影响感知评分图

而与 2012 年的监测数据（如图 2-2）对比来看，2013 年对于经济增长的认可度提高了，说明喀纳斯旅游经济在稳固增长；就业增加的认可度稍微降低，可能是对一些原先新增加的职业失去了新鲜感，在走访的过程中发现很多村民去年在管委会所从事的环卫、护林等工作今年就不再干了，而环卫的工作，外地年轻人从事的多了起来；物价上涨的认可度则是降低，可能是开始习惯了高物价的状态；对于贫富差距的认可度在降低，说明贫富差距在减小。

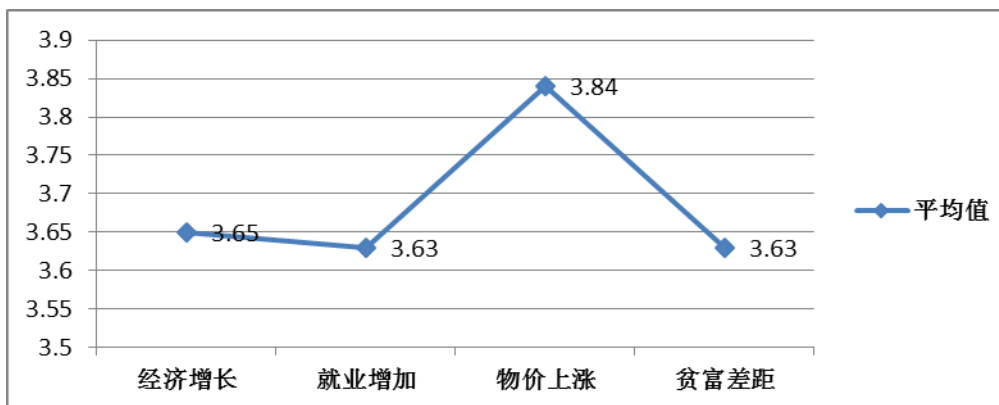


图 2-2 2012 年居民经济影响感知评分图

2.4.2 旅游的社会影响

从本次监测获得的问卷分析情况来看（如图 2-3），居民对旅游所产生的社会影响方面，对道路水电、教育水平、民居改造等选项的均值较高，说明他们所感知旅游对这些社会基础设施是有积极影响的；而对于犯罪增加、打扰生活、限制资源、关系紧张等反向选项，其均值较低，说明旅游并未造成以上这些消极的社会影响。值得关注的是正向选项中均值较低的医疗水平和反向选项中均值较高的交通拥挤选项。居民对医疗水平普遍的不满意是喀纳斯社区民生问题中需要引起重视的一项，而交通拥挤这项虽然居民感知强烈，但是对居民日常生活影响并不是很大。

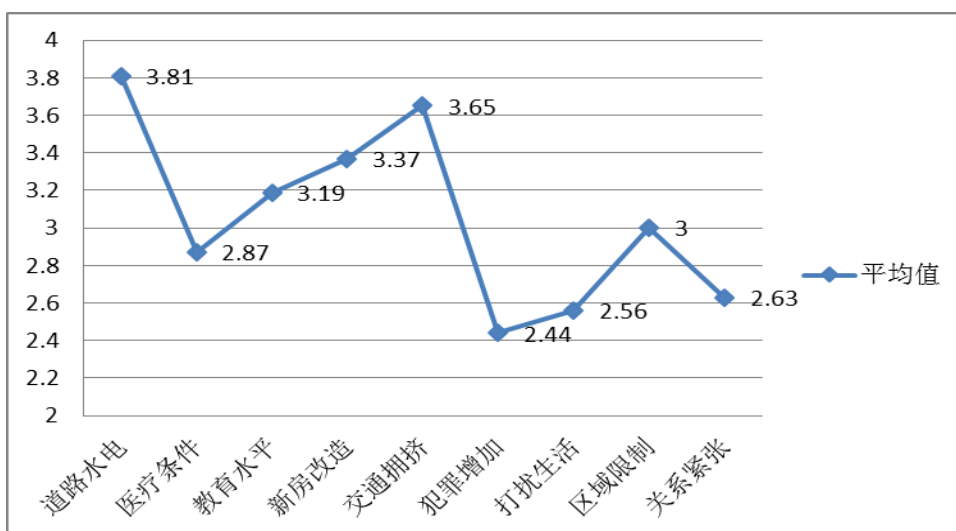


图 2-3 旅游社会影响感知总体均值

对比 2012 年的数据（如图 2-4），我们发现道路水电的认知度比去年有所降低，说明这类基础设施工程随着时间的推移，居民日渐适应后，其新鲜度便下降了，进而影响其满意度；医疗条件依旧是社会影响中均值较低的一项，并且今年的均值比去年更低，说明该地区的医疗水平提高迫在眉睫；教育水平也比去年降低，这与村民反映该地区学生日渐流失的情况相吻合，因此教育水平虽然均值不低，但是还是需要警惕；新房建设均值相比去年也降低；交通拥挤情况比去年稍微严重一些，说明游客在逐年增长。总体来讲，景区所投入的硬件设施随着时间的推移，居民的满意度在逐年降低，但是关系到居民日常起居生活的民生问题，却并没有解决，反而导致村民的更加不满意，因此，喀纳斯地区在未来的政策导向中应关注更多与群众生活攸关的软件设施，如引进好的医生及教师。

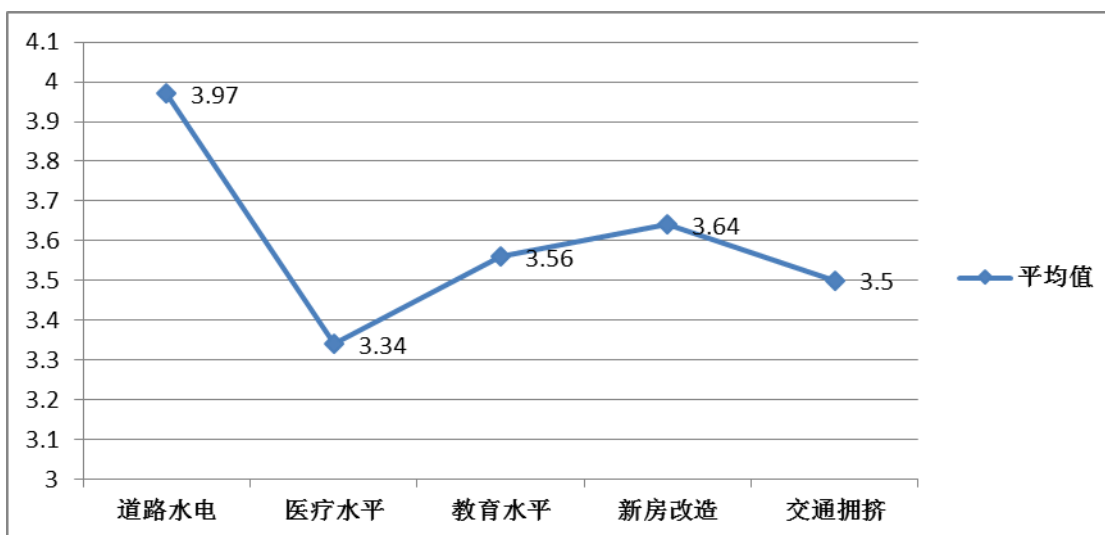


图 2-4 2012 年居民社会影响感知评分图

2.4.3 旅游对社区文化的影响

对于居民对旅游产生的文化影响，从本次监测获得的问卷分析情况来看（如下图 2-5），居民对文化交流的认可度较高，说明居民与游客的交流效果较好；对于文化破坏的选项，认可度较低，说明居民对于本民族文化的保持信心饱满，游客所带来的外来文化的侵蚀并不明显；对于节庆活动的增加感知一般，说明旅游对节庆的影响较弱；对民族手工艺品的发展感知较弱的主要原因还是该地尚未形成专门针对游客的民族手工艺品市场，在景区充斥着其他景区也可买到的手工艺品，而当地特色的还未完全推向市场。总体来讲，民族传统文化保护较好，同时需要进一步开发民族节庆市场及民族手工艺品市场。

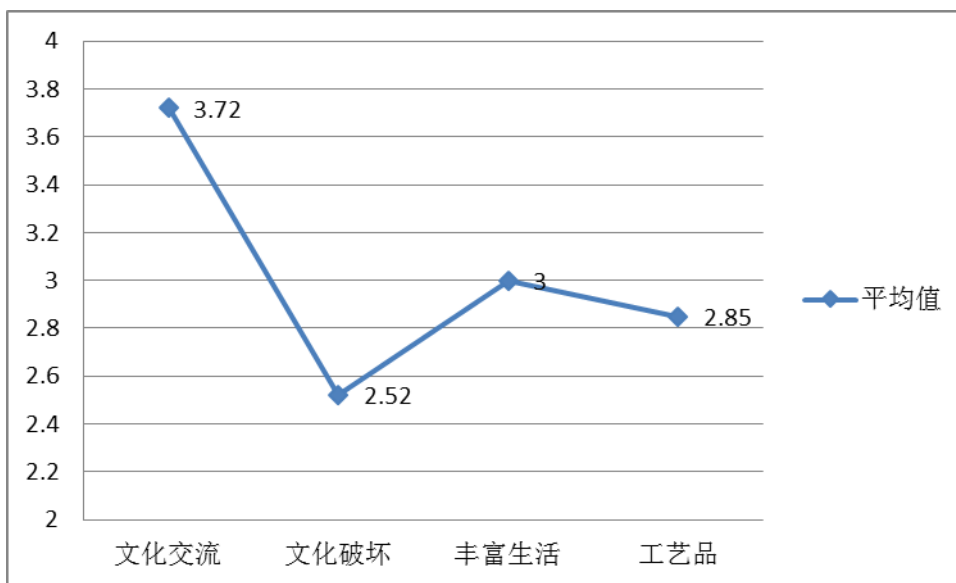


图 2-5 旅游文化影响感知总体均值

对比于 2012 年的数据（如图 2-6），我们可以看到文化交流这一项变化不大，说明每年都保持较好的文化交流状态；文化破坏这一项今年更低，说明居民对本民族文化的坚守更加坚定了；生活丰富这一项比去年降低，说明居民对节庆活动的感知比去年降低，也许是因为节庆活动渗入到生活中，对其新鲜度降低的缘故。

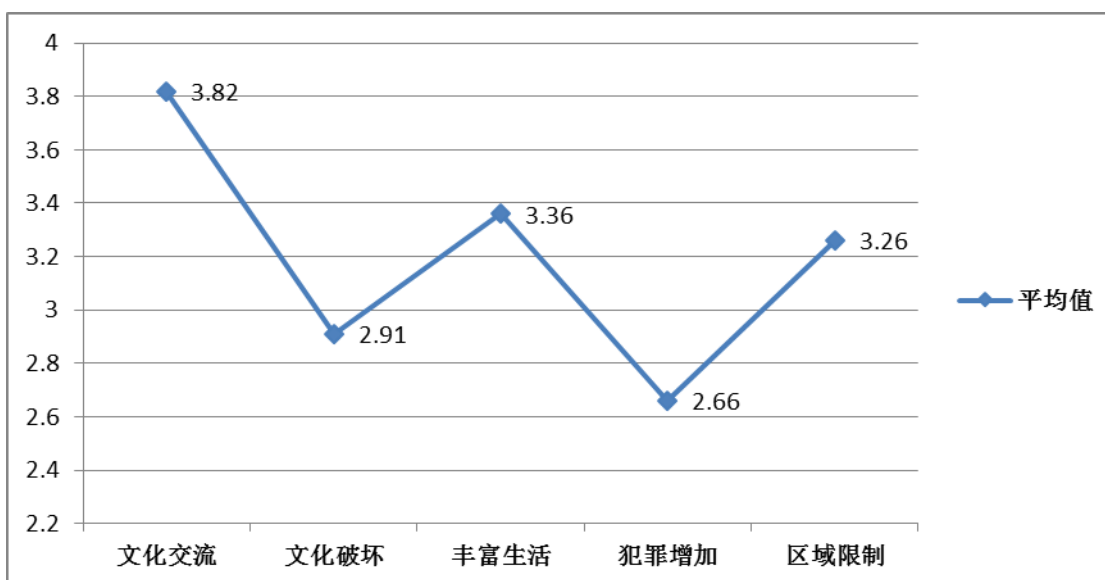


图 2-6 2012 年居民文化影响感知评分图

2.4.4 旅游对环境的影响

对于居民对旅游产生的环境影响感知，从本次监测获得的问卷分析情况来看（如图 2-7），居民对于正向影响感知选项，环境卫生与环保的提高，均值都高于 3.7，说明居民对于环境的保护还是较满意的；而负面影响感知选项空气污染、噪音污染、水污染、垃圾增多等选项的均值较低，说明居民并不认为这些遭到了污染。总体来看，喀纳斯地区在旅游发展过程中，对环境的保护做得较好。

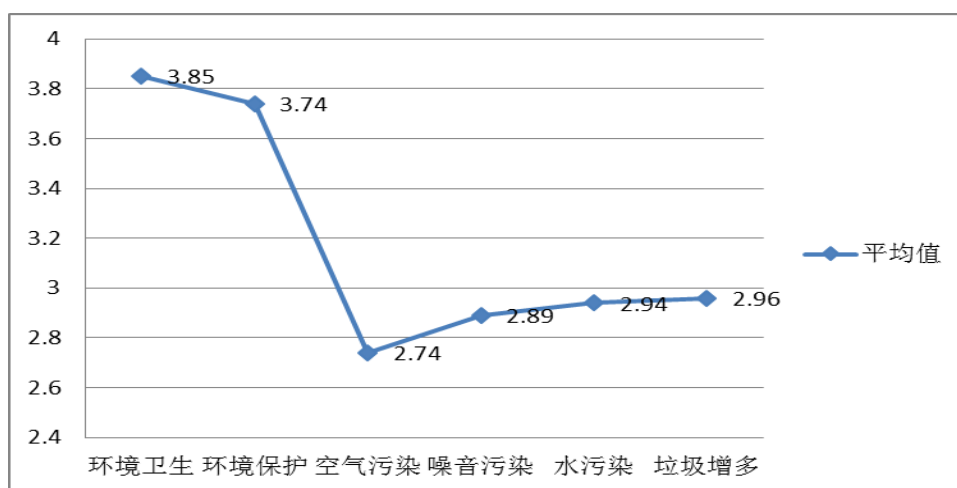


图 2-7 旅游环境影响感知总体均值

与 2012 年的监测数据对比来看（如图 2-8），可以发现 2013 年的正向选项要高于 2012 年，负向选项要低于 2012 年，说明居民感知 2013 年的环境较于 2012 年的环境有较大的提升。

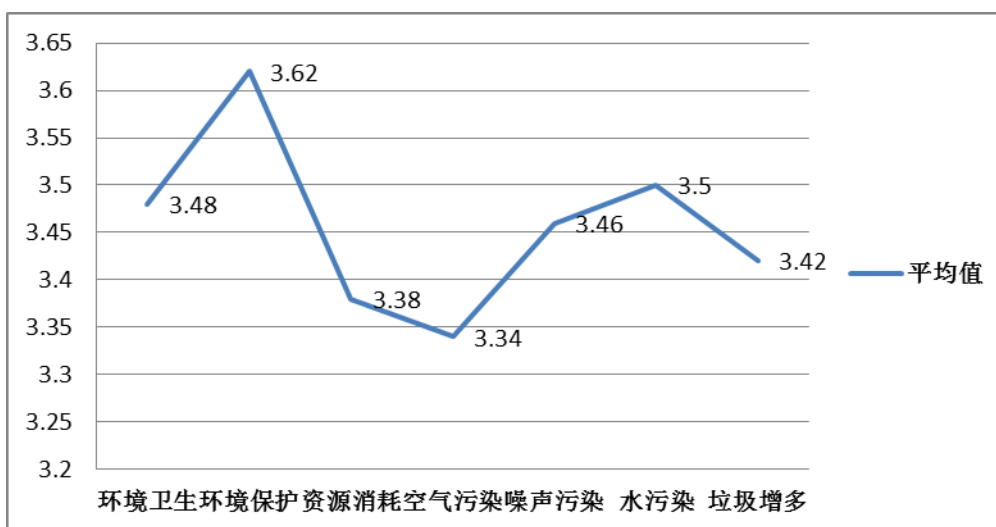


图 2-8 2012 年旅游环境影响感知总体均值

2.5 居民态度

对于居民对喀纳斯的旅游发展态度，从本次监测获得的问卷分析情况来看（如图 2-9），居民对喀纳斯的旅游发展态度是较为积极的，也非常愿意从事旅游行业，为景区献言献策等，除了景区部门是否经常听取意见这一项。一方面也说明景区管理部门在实施各项政策时，需要转变工作方法，让群众真切感受到景区管理部门对基层群众的关注；另一方面，也需要思考一下采用何种社区参与方式才能即保护景区，又让本地居民受益更多。

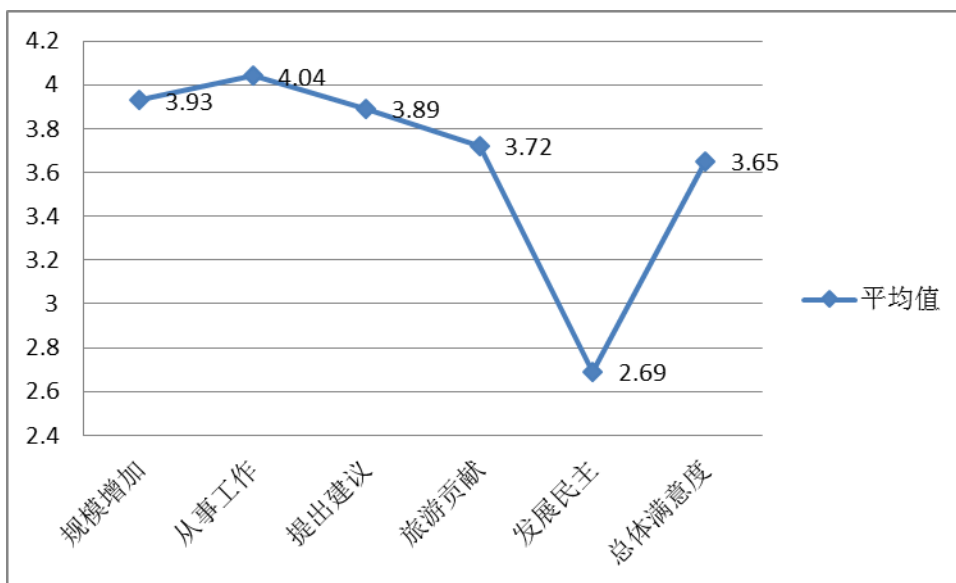


图 2-9 居民满意度均值

与 2012 年度数据（如图 2-10）对比发现，2013 年居民对于景区旅游发展的态度与 2012 年变化并不明显，居民依旧对喀纳斯的旅游发展较为满意，同时也对景区不积极采纳群众意见表示不满。

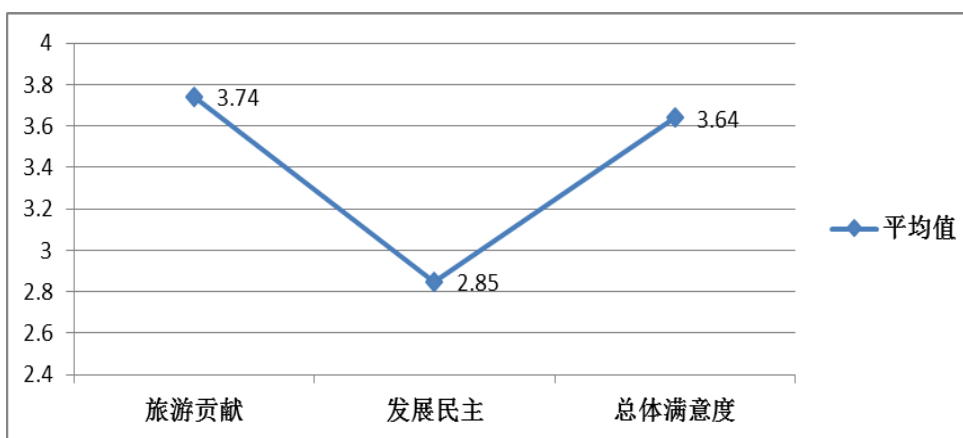


图 2-10 2012 年度居民满意度均值

3 旅游经济收益

3.1 旅游经济收益监测概况

本次对于喀纳斯旅游经济收益方面的监测，主要涉及喀纳斯下湖口区域、喀纳斯新村和老村、白哈巴村、铁热克提乡镇的经营户，共访谈 36 家经营户，访谈时间从 15 分钟到 1 个小时不等，涉及住宿、餐饮、旅游纪念品、家访、商店、租马等经营类型。此外还从喀纳斯管理会取得相关资料予以补充，所监测的情况如下所述。

3.2 社区及旅游目的地的经济收益

3.2.1 景区的游客数量和旅游收入

从管委会所取得的统计数据显示，2012 年，喀纳斯景区共接待游客 106.8 万人（其中下湖口区域 63.2 万人、禾木景区 29.4 万人、白哈巴景区 14.2 万人），同比增长 17.8%（如图 3-1），景区旅游接待人数首次突破百万大关；门票收入 1.12 亿元，增长 16.1%（如图 3-2）；旅游综合收入 11.4 亿元，同比下降 2.23%（如图 3-3）。



图 3-1 2008-2012 年喀纳斯景区游客数量

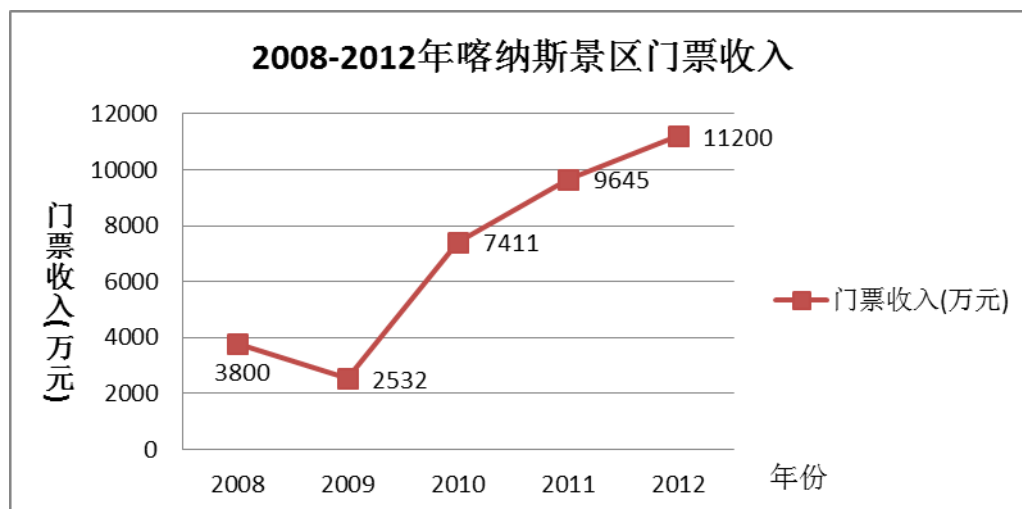


图 3-2 2008-2012 年喀纳斯景区门票收入

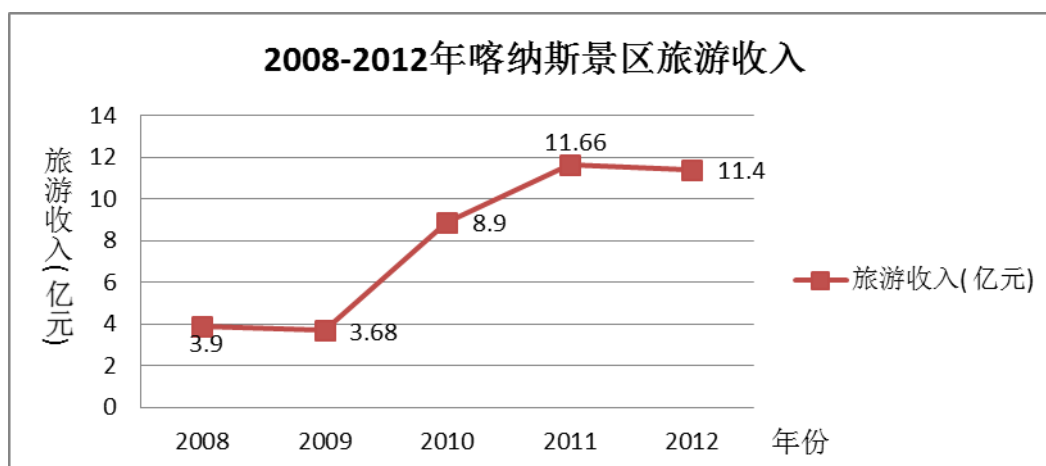


图 3-3 2008-2012 年喀纳斯景区旅游收入

就 2013 年来看，由于受国内经济发展趋势性放缓、公务游受相关政策的抑制以及新疆复杂的维稳形势等不利因素的影响，喀纳斯景区旅游人数、门票收入各项指标明显回落。截止 6 月 30 日，喀纳斯景区共接待游客 5.9 万人（下湖口），完成全年计划的 8.4%，同比下降 21.5%；实现门票收入 817.9 万元，完成全年计划的 6%，同比减少 32.7%。完成固定资产投资 3396 万元，完成全年计划的 14%。

3.2.2 旅游对当地社区居民的经济贡献

✧ 旅游补贴逐年提高

2008 年之前，由于喀纳斯景区基础设施不完善，游客蜂拥而来，一大批牧民为了提高收入，将房屋出租给外地人经营旅社和餐馆，但随之带来的不仅是村落脏乱差，自然环境严重破坏，还有无序竞争和社会安全问题，景区形象大打折扣。

2008 年，是喀纳斯景区给牧民发放该补贴的第一年。2008 年，景区管委会针对越来越严重的无序竞争和脏乱差现象，取缔了喀纳斯的租房和餐饮，并每年拿出 210 万元，按当时的租房价给予牧民补贴 3 年。2008 年，景区按照 50 元/人/月标准为两乡全体牧民发放生活补助金，2009 年提高到 60 元，两年累计发放生活补助金 400 多万元。2010 年，地区行署批准实施《喀纳斯景区农牧民增收致富方案》，提升至 70 元/人/月进行补助。2010 年，景区管委会从门票收入中提取 1076 万元，直接发放给牧民 887 万元，其余 189 万元用于乡村集体经济发展基金。从 2011 年开始，喀纳斯景区再次提高了牧民旅游补助金发放标准：哈纳斯村 1 万元/人/年，禾木村 5000 元/人/年，白哈巴村 4000 元/人/年，门票站以外的三个村（铁热克提村、齐巴尔希力克村和阿克布拉克村）按照 1730 元/人/年的标准发放，2011 年发放补助金 2452 万元，2012 年，基本与 2011 年相同，共发放农牧民增收致富补助资金 2400 余万元。

✧ 农牧民人均收入逐年递增

除发放补贴外，喀纳斯景区管委会每年还通过政策性引导和技能培训等方式，让更多的景区牧民参与旅游，通过自己的劳动增收致富。当前，喀纳斯景区农牧民对参与旅游的积极性很高，愿望也很强烈，但目前农牧民参与旅游只是停留在初级阶段，参与旅游的方式有：一是房屋出租，将多余的房屋出租给外来人员经营食宿；二是组建马队或者开办家访点（喀纳斯村）；三是劳务输出，在景区从事环卫、设施维护以及宾馆、餐厅等服务工作；四是产品销售，主要包括出售奶制品、奶酒、松籽、野果、菌类、中草药、民族特色手工艺品等。

自 2008 年以来，景区农牧民的人均纯收入逐年持续上涨，2012 年，景区两乡（铁热克提乡和禾木哈纳斯蒙古民族乡）农牧民人均纯收入达到 8745 元，比 2011 年增收 1125 元（如

图 3-4)，由于旅游已经是喀纳斯地区支柱型产业，由此来看，旅游对于居民的收入有相当积极的作用。



图 3-4 2008-2012 年喀纳斯景区农牧民人均纯收入

3.3 旅游的季节性

3.3.1 旅游需求的季节性

◇ 旅游季节性强，旺季集中于 7、8、9 三月份

结合2012年喀纳斯可持续旅游发展监测报告中的统计数据，通过2007-2011年喀纳斯景区每年5-10月的游客数量走势分析，可以判断，喀纳斯景区的旺季是7、8、9三月份，5、6、10月三个月为非旺季，而1-4月及11、12月为淡季。

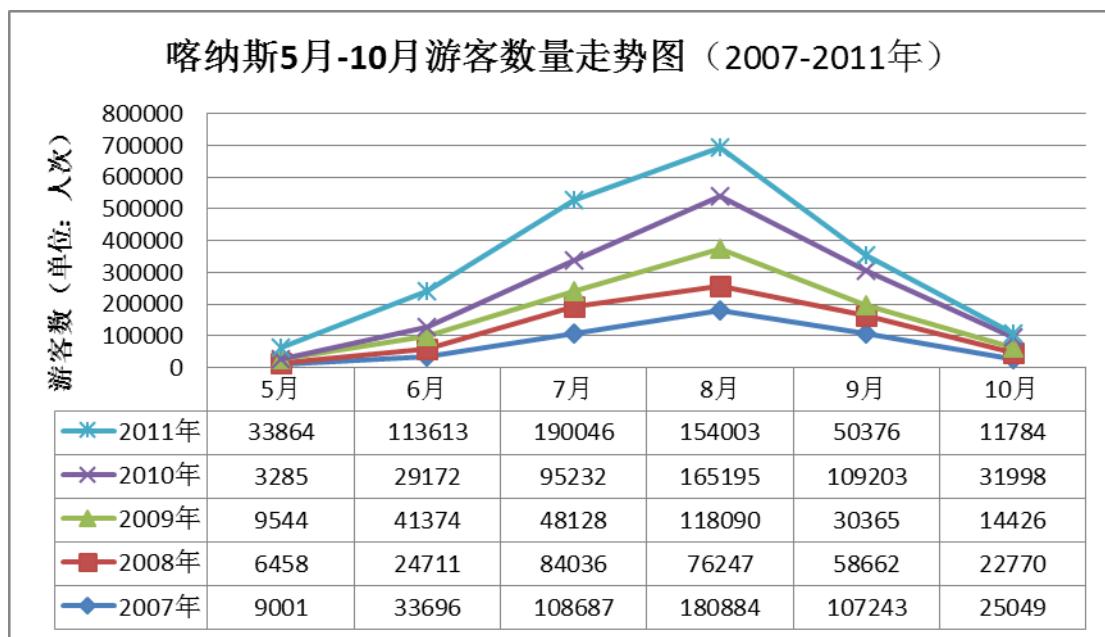


图 3-5 喀纳斯 2007-2011 年 5 月-10 月游客数量走势图

数据来源：2012 年喀纳斯可持续旅游发展监测报告

注：由于喀纳斯 11-12 月以及来年 1-4 月为全年中的淡季，游客数量非常少，并且缺乏统计数据，因此没有纳入分析的范畴之内。并且，由于 2012 和 2013 年相关数据缺乏，没有进行统计。

造成景区季节性强的主要原因是气候，喀纳斯地处国土北疆，由于纬度较低，气候变化明显，冬季较长，气温低至零下 40 度，进出喀纳斯景区的交通也相当不便，喀纳斯机场冬季关闭，只能靠公路或雪橇进入，部分程度上限制了很多游客的到来。因此，在每年的 11 月至来年的 4 月漫长的寒冷冬季，游客甚少，只有少量的冰雪旅游者，游客量最多在几千人左右。而 7、8、9 月份喀纳斯的气候舒适，7、8 月份正是国内暑假黄金旅游季，很多游客以家庭等形式出游，9 月份则是喀纳斯最美的秋季，色彩斑斓的森林，对摄影爱好者及观光度假旅游者均有很大的吸引力。

3.3.2 旅游供给的季节性

受旅游需求强季节性的影响，喀纳斯景区的旅游供给也呈现出明显的季节性。景区内外部交通、住宿、餐饮等服务设施季节性开放，每年 5-10 月旺季期间正常营业，11、12 及 1-4

月旅游淡季期间，景区管委会回到布尔津县上班，而各类旅游企业（商铺）中，外来经营户全部下山关门歇业，只有本地社区居民全年开放。

✧ 景区内外交通的季节性

喀纳斯机场是季节性旅游机场，每年 6 月旅游旺季复航，随着“十一”旅游黄金周的结束而闭幕，全年共运行 4 个月。喀纳斯机场关闭期间，可从乌鲁木齐乘汽车到达布尔津县，之后从布尔津县城乘车至冲乎尔乡，乘坐马拉雪橇或者骑马进入景区，势必增加了旅行时间，一定程度上限制了游客的出行行为。

夏季景区内的交通主要依赖区间车，自驾车不允许进入，区间车开放时间为：5-10 月，10 月 10 号到来年 5 月初，冬季旅游期间可以自驾车进入喀纳斯景区，出于安全考虑，卧车不允许在冬季进入景区，只有配备雪地胎的越野车方能放行，游客也可乘坐喀纳斯景区牧民雪橇进入景区游览。

✧ 住宿、餐饮、旅游活动和服务项目的季节性供给

喀纳斯景区的游客集中于 5-10 月，其余月份少有游客，因此在 11、12 月及 1-4 月期间，白哈巴的旅游巴扎、贾登峪的摊位以及各区域的旅游纪念品商店、住宿、餐饮设施全部关闭，而喀纳斯湖游船及漂流活动受气候影响也不再开放，只有景区当地社区居民经营的家访、住宿和餐饮店铺开放。

每年 5 月份进入喀纳斯景区的游客相对比较少，并开始增长，部分企业选择在此时段进行装修，等到 6 月份游客达到一定数量时才开业。根据 2012 年旅游工作站统计，5 月份喀纳斯下湖口区域正常营业的经营单位有 9 家，另外 2 家正在装修施工；贾登峪区域正常营业的有四季休闲酒店等 19 家，其余 60%的经营户在装修，禾木区域只有禾木山庄正常营业，白哈巴区域正常营业的有吾肯旅游山庄、团结旅社、大脚餐饮、面对面山庄、白哈巴山庄 5 家。

2013 年新建成的旅游巴扎位于白哈巴村东南侧，占地面积 2000 平方米，现设摊位 48 个（根据发展需要，可新增摊位 100 余个），主要以出售土特产品、民族手工艺品及民俗特色餐饮为主，所有摊位由白哈巴村委会统一管理。旅游巴扎于 8、9 月份开放，据测算，每

个摊位营业额 800 元/天左右，年内可实现营业额近 200 万元。

3.4 旅游企业的经营与发展

3.4.1 旅游影响下商业业态的变化

旅游业的发展带动当地旅游企业数量的增长，旅游企业的经营内容围绕着游客的食住行游购娱六个大需求要素，在喀纳斯景区，5-10 月不允许私家车进入景区，交通只能靠区间车，娱乐活动主要有家访、漂流、游船等，住宿、餐饮设施逐年增多。喀纳斯景区的经营商铺类型见下图，从中可以发现喀纳斯景区内最主要的商业经营形式为餐饮和住宿两大类，这两大类商铺总共占到商铺总数的 80%（160 家），商业业态较为单一。纪念品商店、百货、娱乐及其他分别占到 4%（8 家）、12%（26 家）和 4%（8 家）。此外，多数的商家提供的服务和产品没有太大的区别，同质化现象极为严重。

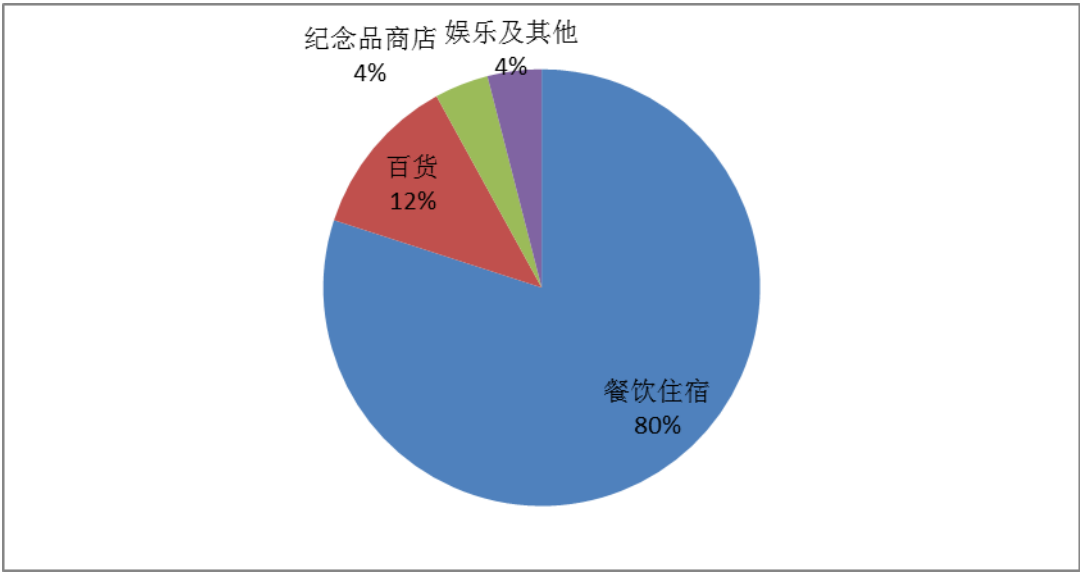


图 3-6 喀纳斯景区不同业态商铺数量比例图

3.4.2 旅游企业的布局分析

✧ 旅游企业区域分布不均衡

贾登峪是喀纳斯旅游区门户节点，四面通衢，成为串联起喀纳斯、禾木、白哈巴、铁列克提、那仁牧场等大喀纳斯旅游区重要旅游节点的中心点。2012 年贾登峪拥有景区 67%的床

位和 39%的餐位，住宿和餐饮设施最为集中，是游客的集散地。设施的分布也与游客的接待量是一致的，大景区内到访游客数量由多到少分别是：喀纳斯下湖口区域、禾木景区和白哈巴村。尽管铁热克提并未纳入统计之列，但当地也有一些住宿和餐饮企业，由于到房游客较少，企业数量和规模逐渐萎缩。

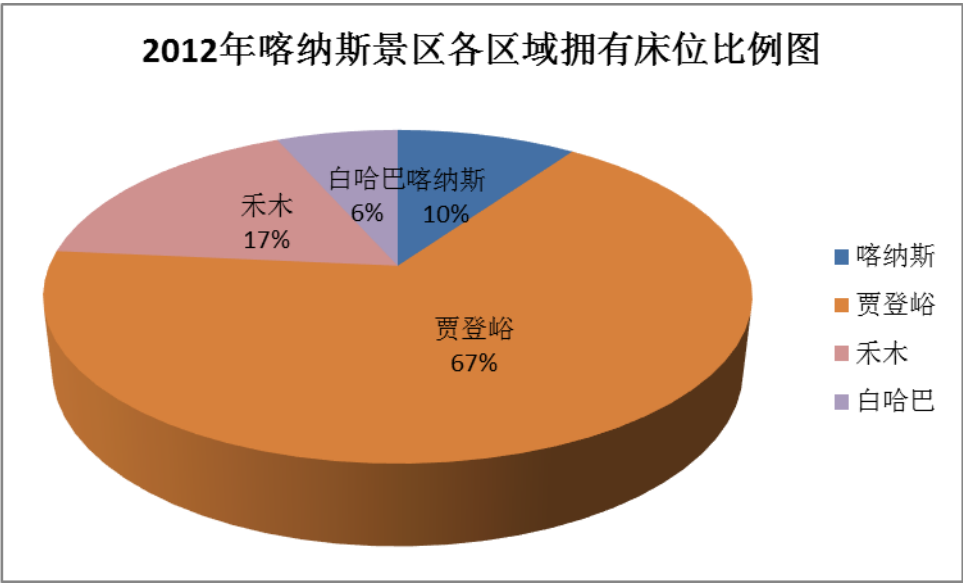


图 3-7 2012 年喀纳斯景区各区域拥有床位比例图

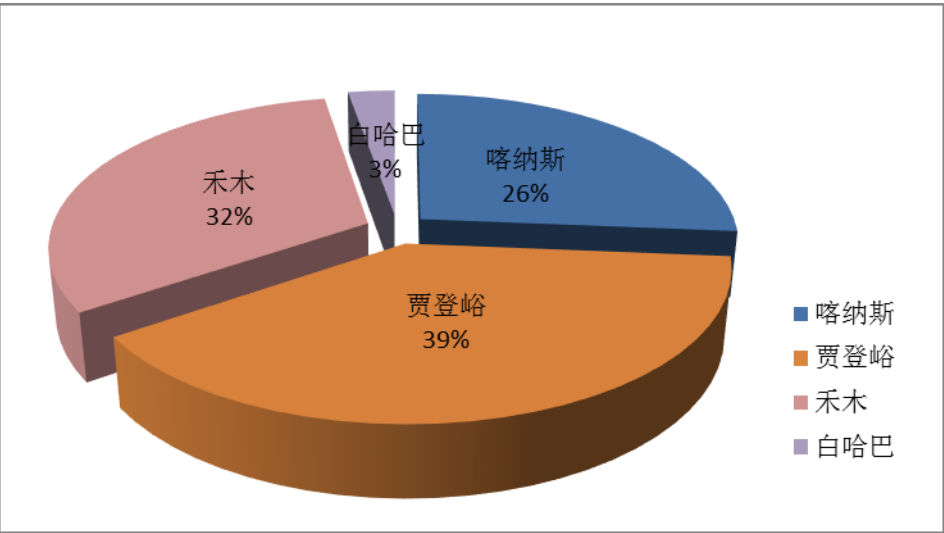


图 3-8 2012 年喀纳斯景区各区域拥有餐位比例图

受禾木景区公路养护工程影响，进入禾木景区只能通过骑马或者越野车，因此本次调研并未到达禾木景区，但间接了解到受交通限制游客减少，导致部分企业关门歇业，有些企业

主甚至到喀纳斯村来经营小企业,因而 2013 年禾木景区的旅游企业统计数据需做特殊处理。

✧ 旅游企业经营效益区域差异大

喀纳斯新村和白哈巴村面向游客的商铺经营效应明显较好,而铁热克提乡游客较少,绝大部分商铺面向本地人,多数床位闲置,餐馆顾客主要是本地居民或正在转场的牧民,甚至有些餐馆面临歇业。喀纳斯新村的商店密度较高,经营内容是日常生活用品,如衣服、鞋子、食品、蔬菜、日用品、啤酒等为主,原本写在墙上的“旅游纪念品”招牌也逐渐褪色,根本没有游客前来购买。相比而言,喀纳斯旧村的商铺生意兴旺,游客较多,经营效益较好。

4 游客满意度

4.1 游客满意度监测概况

游客满意度是决定游客是否会重游、是否会向他人推荐的重要因素，是旅游地可持续发展的重要指标。本次对喀纳斯景区的游客满意度监测主要通过抽样问卷调查的方式进行，利用客观选择题对游客的基本行为特征进行调查，并利用一系列旅游资源、环境评价的“认知指标”对游客的满意度进行评估。本次调查共发放问卷 680 份，其中有效问卷 633 份，有效率 93.1%。其具体对喀纳斯游客满意度的监测如下所述。

4.2 游客基本特征

4.2.1 游客个人信息

◇ 地区：经济发达城市游客较多，呈现大分散小集中趋势

根据省份划分 429 位完成调查的游客的居住地（如图 4-1）。从各省的频数及占总体百分比可知，被调查的游客中，来自北京的游客占比为 12.4%，超过来自新疆省内游客数。此外游客较多的省（市、自治区）依次为广东、江苏、浙江、等。另外值得关注的是来自台湾、香港的游客分别占了 2.6%与 1.6%。虽然受取样的影响，但调查显示的结果仍有一定的参考意义。与 2012 年 7 月所得数据对比可发现，经济发达城市游客较多的情况并未改变。由于 9 月为喀纳斯旅游旺季，省内游客比例下降，客源地更为分散，但北京、珠三角、长三角扮演的重要角色愈发凸显。

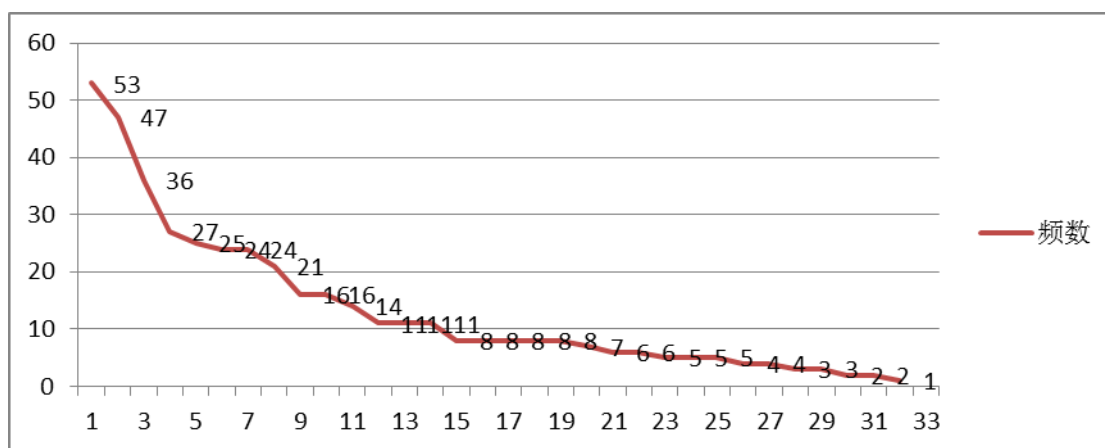


图 4-1 各省游客数量

◇ 文化程度：游客文化程度普遍较高

据问卷统计分析，游客的文化程度平均值为 4.6（以 1~5 分别对应小学、初中、高中或中专、大专、本科，以及研究生以上学历），也即游客的平均文化水平接近本科。如图 4-2 显示，拥有本科学历的游客占 49.3%，大专为 20.7%，高中或中专为 12.1%，研究生及以上占 15.1%。与去年的情况相同，考虑到部分游客的学历受年龄限制，整体上来看，到喀纳斯景区旅游的游客文化程度普遍较高。与之有一定关联的是游客的经济收入、职业身份以及审美需求。

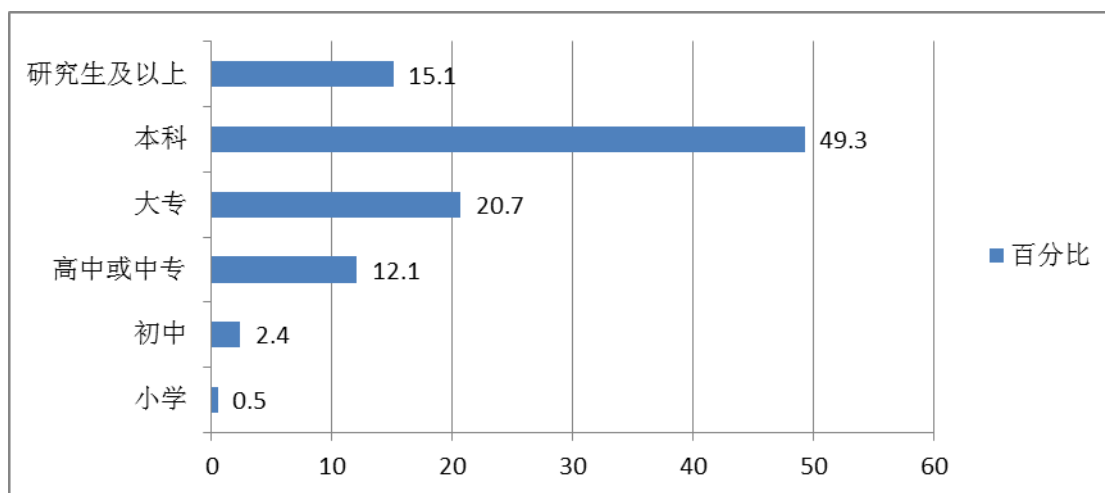


图 4-2 游客文化程度

✧ 年龄：游客年龄层次相对高

据统计，超半数的游客年龄在 25 岁至 44 岁之间，而 45-64 岁游客所占比例也较高，达到 26.1%。25 岁至 64 岁游客恰好是市场中具有较强消费能力的群体。此外，18 岁以下游客仅占 0.9%，18-24 岁游客占 11%。而 65 岁以上游客仍占 3.1%，反映喀纳斯也吸引了一群收入较高且有远距离出游习惯的退休老人。

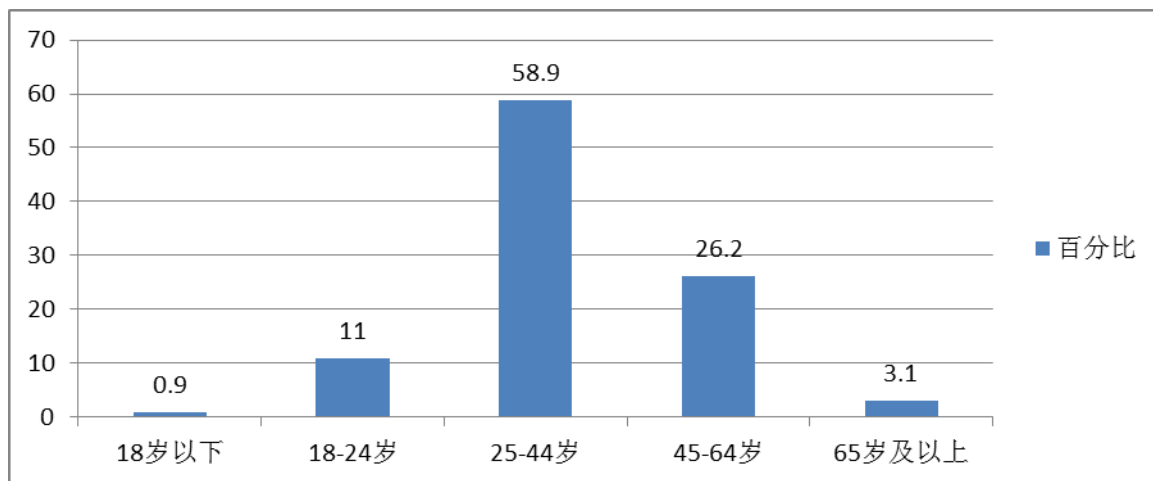


图 4-3 游客年龄层次

4.2.2 旅行信息

✧ 旅行方式：团队游客较多，自助游客增加

在 633 份有效问卷中，有 258 份是自助游，占 40.8%，其中徒步客占总数的 16.6%；个人参团的游客有 147 名，占 23.2%，与朋友或家人参团的为 140，占 22.1%，因此选择参团的游客共占 45.3%；单位组织的为 53，占 8.4%，会议考察的也达到 3.5%（如图 4-4）。整体来说，团队游客数量最多，但与 12 年相比较，自助游游客所占比例似有上升趋势。尤其是在禾木村因交通施工无法正常开放的情况下，仍有大量徒步游客已经或意欲前往禾木，可见喀纳斯对自助游客，尤其是徒步游客的吸引力。

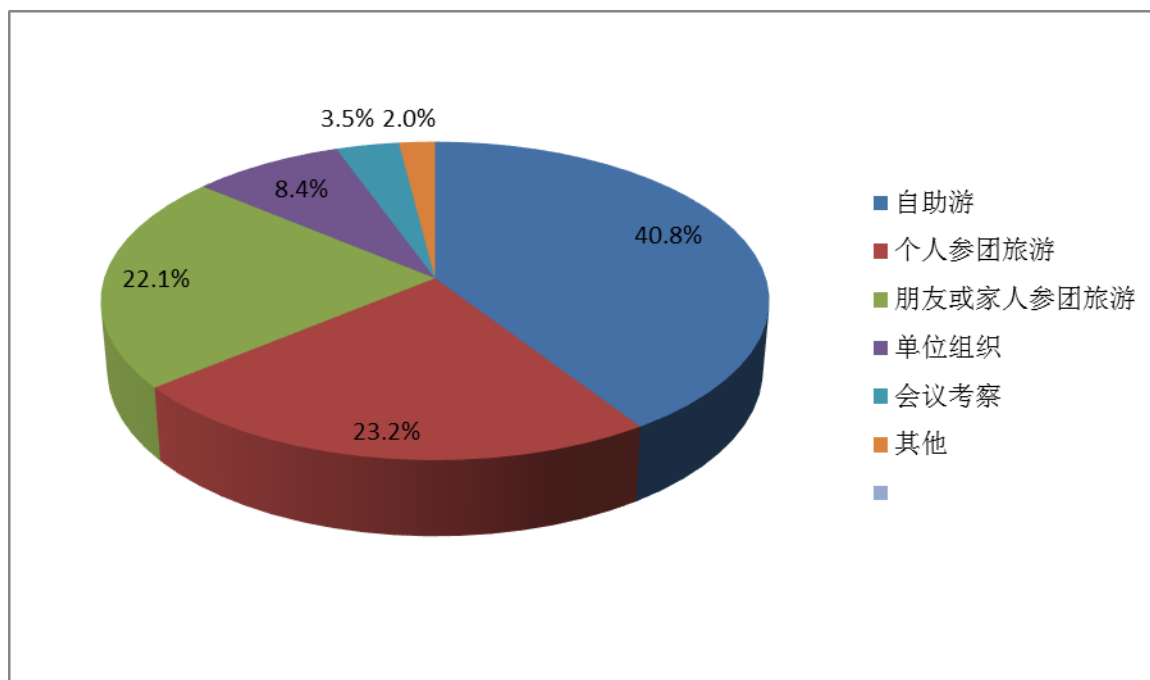


图 4-4 游客年龄层次

✧ 信息渠道：网络电视、亲友推荐、电视更主要

在 633 名游客中，有 259 名游客表示曾从网络获得信息，占总数的 40.9%，而有 233 名游客表示受亲朋好友推荐影响，占 36.8%。而 154 名游客也通过电视获得信息，占 24.3%。此外，选择旅游书籍的游客多于选择旅行社宣传的，两者分别占 19.4% 与 17.1%，而选择报刊的游客较少，仅有 46 名（如图 4-5）。整体来说，网络、亲朋好友推荐和电视是喀纳斯景区游客信息获取的三大主要渠道。同时，有较多游客选择旅游书籍的情况显示出旅游市场的一定特性，也与游客整体文化素养较高的情况有关。

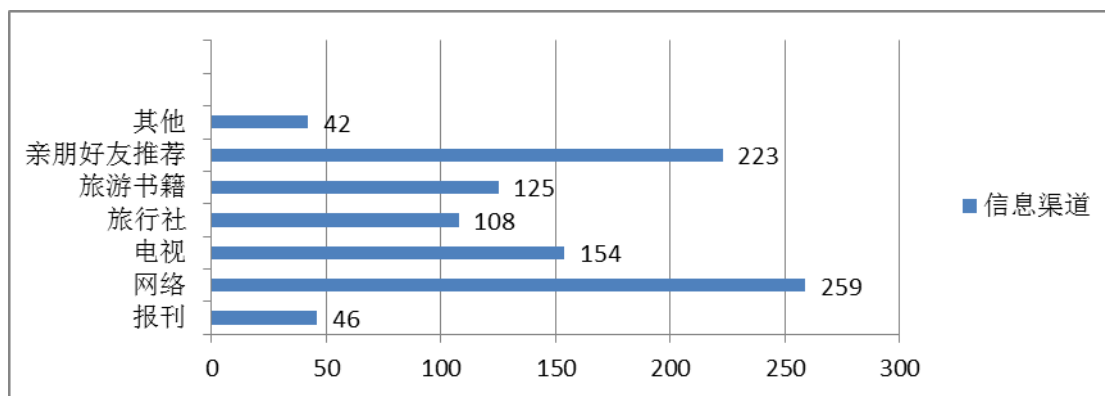


图 4-5 旅游信息渠道

4.3 旅行体验评价

4.3.1 旅游资源评价

✧ 资源本底整体受认可，活动开发相对评价低

游客对喀纳斯的旅游资源满意度高，问卷中对旅游资源的评价共有 8 个子项目，如图 4-6 所示。从中可以发现，本年度游客对于旅游资源满意度方面，除“旅游活动”以外，其余选项的均值均高于 4。评分的均值从高到低依次为喀纳斯湖 4.68、森林 4.53、草原风光 4.42、气候 4.39、人居环境 4.19、民族风情 4.17、边境氛围 4.10。从与 2012 年的数据对比来看，可以发现游客对于气候和边境氛围的满意度有了显著的提升，而对于旅游活动的满意度有了显著的下降，说明游客对喀纳斯的旅游资源本底评价较高，但普遍认为旅游活动的开发不足。因而，在将来对于旅游活动的开发仍有待进一步加强。

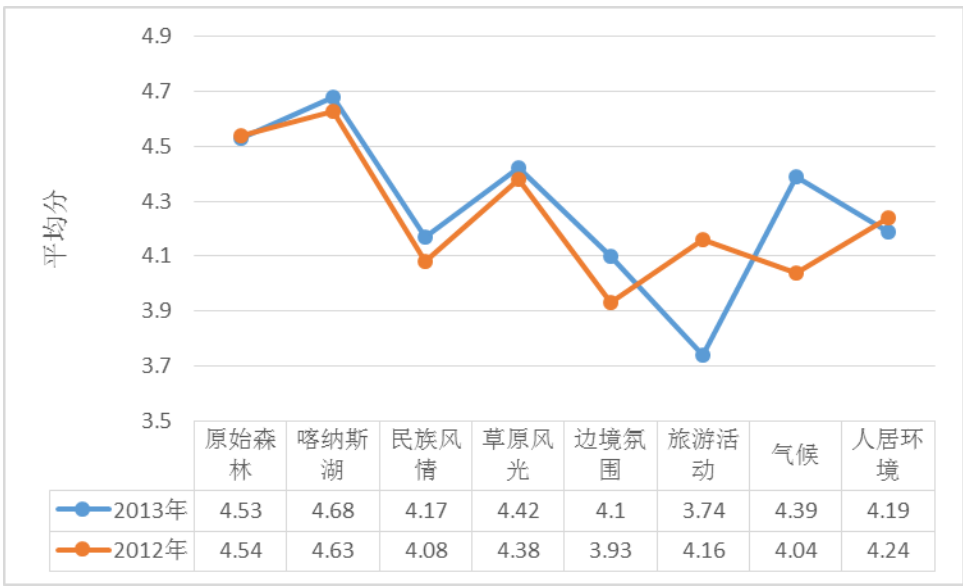


图 4-6 2012 年及 2013 年旅游资源满意度评价

4.3.2 旅游环境评价

✧ 旅游环境整体评价高，社会环境评价有上升

根据 2012 年的调查，游客对于景区的自然环境整体评价较高。相对来说，对社会治安状况、当地居民态度等社会环境的评价略低。而本次调查数据显示，游客对社会治安与居民态度的评价均值分别达到 4.27 与 4.19，相比与 12 年的 4.17 与 3.99 略有上升。

表 4-1 旅游环境满意度评价

环境	1	2	3	4	5	均值
社会治安状况好	0.3	1.2	12.6	34.5	49.7	4.27
当地居民十分友好	0.3	2.2	18.0	33.8	43.5	4.19
说明：非常同意为 5，同意为 4，合并为同意项；中立为 3；不同意为 2，非常不同意为 1						

4.3.3 旅游服务评价

✧ 旅游服务评价均偏低，餐饮住宿影响满意度

游客对景区的旅游服务整体满意度相对前两大类较低，问卷中游客对景区旅游服务的评价共有 12 个子项目，如图 4-7 所示。

据统计结果可发现游客对于喀纳斯景区的旅游服务的评价并不高。本次调查只要求游客从资源、环境与服务多方面整体评价旅游体验，得到的均值是 3.85。贡献值最高的应为旅游资源，而相对来说影响游客满意度的则是服务。在对各项旅游服务的总体评价中，满意度最低的项目为餐饮和食宿的种类、质量和价格，对其不满意（也即选择 1 与 2）的比率高达 30%左右。其中餐饮的价格与质量评价最低，分别仅有 2.86 与 3.01。而对于娱乐活动，游客往往回答“没有参加，不了解”。这也说明目前在服务质量管理方面存在着较大缺陷。

相比于 2012 年的数据来看，除了餐饮价格、旅游商品特色及娱乐活动三者的满意度，其他的项目满意度都有不同程度的提升，尤其在总体满意度方面提升相当明显，可以看来，这一年以来整体服务质量有了较大的提升，不够在餐饮、住宿服务方面的问题仍然存在，且仍需花较大的经理解决。

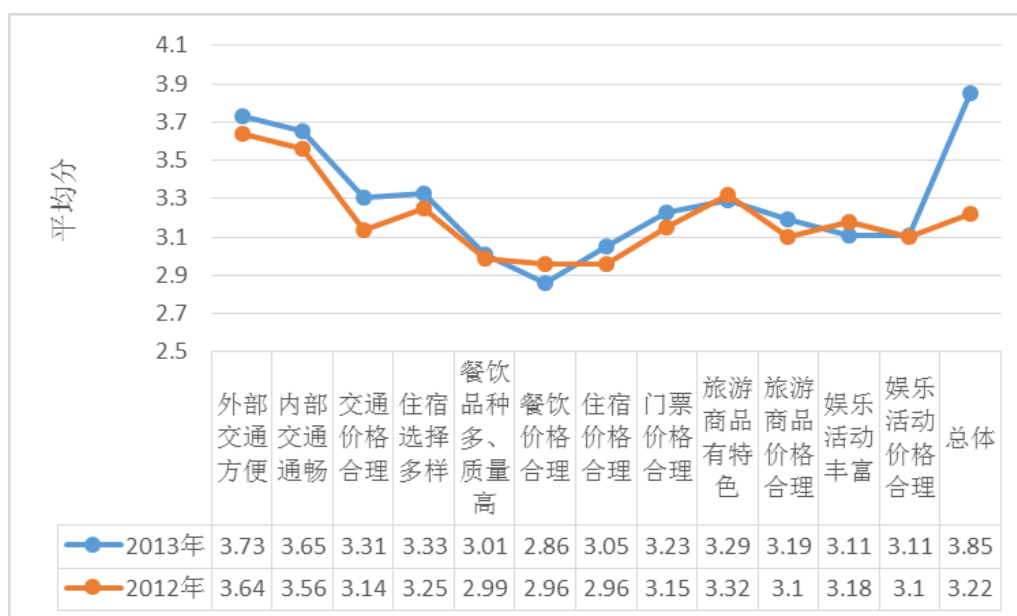


图 4-7 2012 年及 2013 年旅游服务满意度评价

4.4 离境时满意度

◇ 满意度受服务影响，期望基本得到满足

根据上文的分析，问卷中游客填写的整体满意度很大程度收到了旅游服务满意度评价较低的影响。在调查中让游客选择来到喀纳斯后，旅游体验与预想中的是否一致，选项设置有

比预想的更好、与预想的十分一致、一般、比预想的差一点、比预想的差很多等五项，结果统计如下图 4-8。其中，占总数 26.9% 的游客认为比预想的更好，而 61.6% 的游客认为与预期一致。17.3% 的游客感觉一般，17.5% 的游客认为比预期差一点，仅有 3.5% 的游客认为与预期差距较大。总体上来说，大部分游客的期望得到了满足。

相比与 2012 年数据，整体来看游客期望满足程度有相当的提升，感觉比期望好和与期望一致的游客比率比 2012 年要高，而其他负向的感知有所减少，说明了本年度在游客期望管理上有所提升。

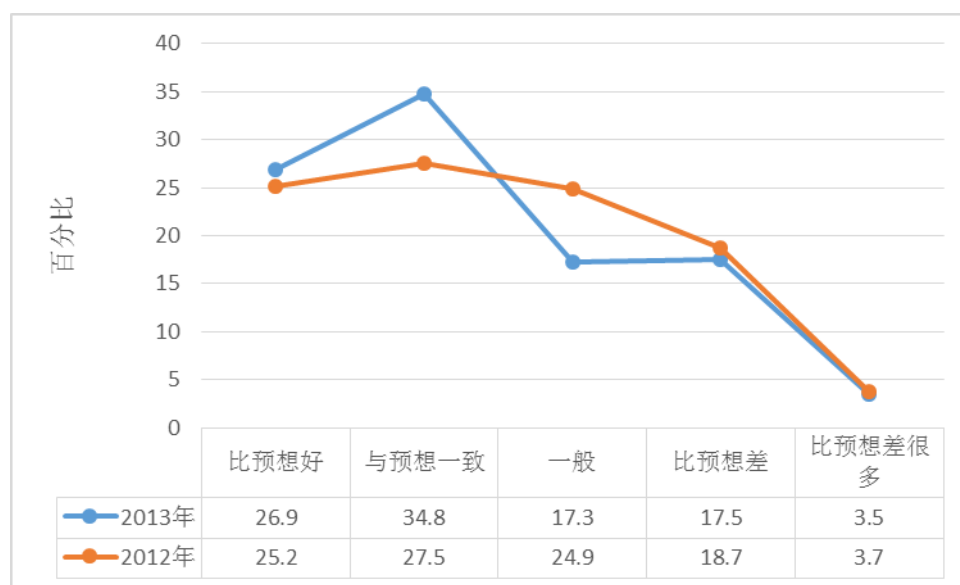


图 4-8 2012 年及 2013 年游客体验与预期差异

✧ 重游意向相对较高，选择时间较为集中

在调查中让游客选择是否愿意再来喀纳斯，有 56.2% 游客选择“是”，有 15.9% 的游客选择“否”，其余 27.9% 游客选择“不确定”（图 4-9）。其中选择“否”的游客中，具体原因主要为距离、交通、费用等。整体上到喀纳斯景区旅游的游客中重游意向较高。但喀纳斯旅游淡季明显。受调查的游客选择的重游时间集中在 7、8 月，且即使受调查的现实游客已是在 9 月来到喀纳斯，仍常表现出在 9 月重游的意向。

相比与 2012 年数据来看，本年度游客重游意愿程度上有较大的提升，一定程度上说明喀纳斯的景区管理工作深入游客，让游客感知有较大提升。

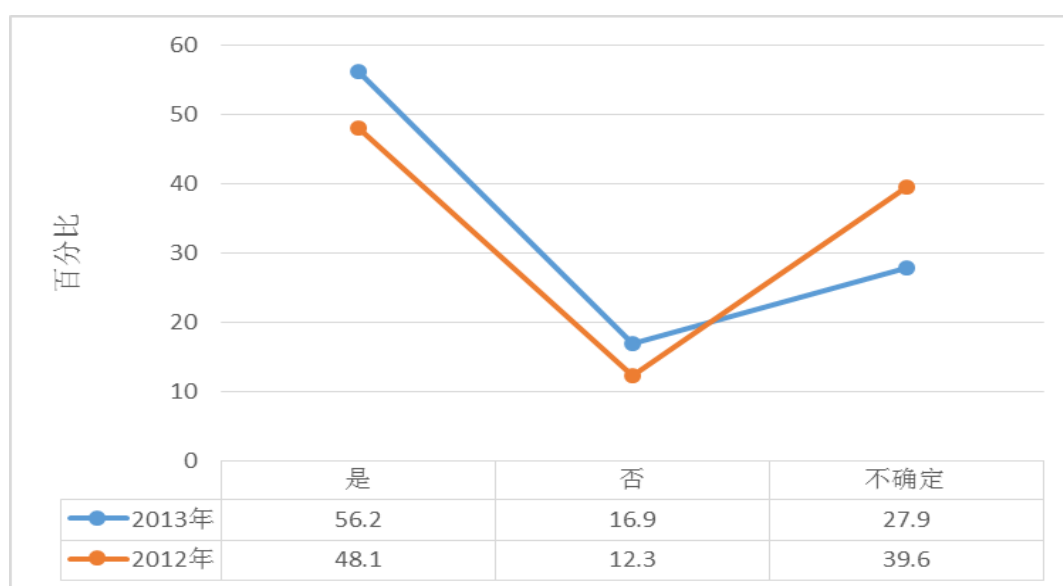


图 4-9 游客重游意向

◇ 推荐意向较为强烈，期待未来继续发展

在调查中让游客选择是否愿意向亲友推荐喀纳斯，有 89.0% 位游客选择“是”，有 4.1% 的游客选择“不会”，其余 6.9% 的游客选择“不确定”（图 4-10）。游客向亲友推荐的意愿比较强烈，整体上到喀纳斯旅游的游客中向亲友推荐的意向高，且远高于 56.2% 的重游意向。由访谈可得知，不少游客认为来喀纳斯的景色值得一看，但路途遥远、成本较高。部分游客则认为景区建设特色不足，管理尚不规范，短期内持保留意见，但对未来的发展抱有期待，可能会在一段时间后再建议亲友出游。

与 2012 年数据对比来看，本年度游客在推荐意愿方面也略有提升，显示出游客越来越倾向于向外推介喀纳斯景区，可见过去一年中，喀纳斯景区的口碑有相当提升。

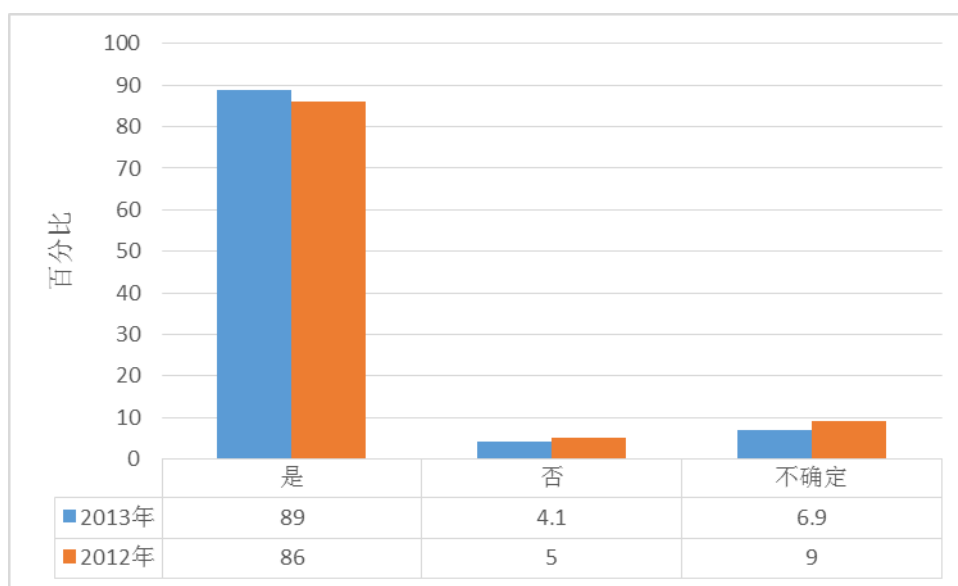


图 4-10 游客推荐意向

✧ 自然风光深入人心，人文体验深度不足

在游客对喀纳斯整体印象方面，根据问卷的开放性问题，对游客所使用词句的频率制作云文字图（图 4-11）可发现，游客大量使用“自然风光”“风景优美”“风光”“美丽”以及其他类似词句描述自己对喀纳斯的主要印象。且有不少游客提到“仙境”“天堂”等词，可见喀纳斯以独特的自然风光诠释其“人间天堂”的定位，在很大程度上得到游客认可。

但同时这也反映出喀纳斯对人文资源开发的薄弱与旅游产品设计的单一。因此，对于景点，游客更多地提到“月亮湾”“观鱼台”等，而“图瓦人家”“白哈巴村”“禾木村”评价虽高，但被提及的频率却低。甚至又游客提出“文化淹没”，可见自然风光是喀纳斯具有核心竞争力的资源，但游客对人文体验也存在期待。

同时，较多游客提到交通、食宿、价格、商业等方面的问题，反映出旅游服务对其印象的影响。

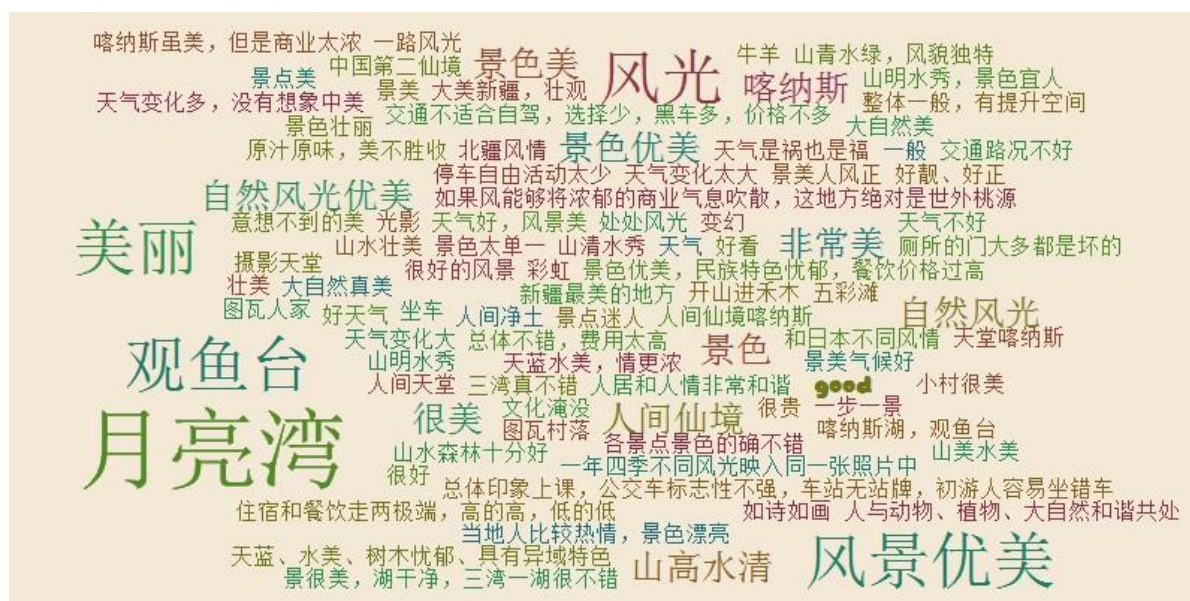


图 4-11 游客印象

✧ 对服务与价格意见较大，包容同时希望规范为先

在填写对喀纳斯的印象以及对未来喀纳斯发展有何意见、建议时，游客最多提及的是“交通”“价格”“服务”“安全”等，而服务主要指的是“住宿餐饮”。这与游客对服务满意度较低的情况相符合（图 4-12）。

但考虑到喀纳斯的社会基础与发展阶段，游客对正处在起步期的基础设施建设与旅游服务管理态度相对宽容。而对于景区内换乘复杂这一点，游客也表示可以接受，但希望服务质量能够进一步提升，避免对旅游体验的影响。

对价格一项，虽然很大一部分游客提出异议，但却仍希望当地经济有所发展、居民生活能够改善。考虑到喀纳斯旅游的淡旺季明显，表示可以接受价格相对偏高。更多被提及的是价格与质量的相当，以及管理的规范化与统一化。

图 4-12 游客建议统计

5 旅游产品和服务

5.1 旅游产品和服务监测概况

旅游产品和服务依托旅游资源开发和设计而成,是旅游地存在和发展的核心内容和根本保障,因此也是旅游可持续发展中的重点监测内容。本次监测中对大喀纳斯旅游区的旅游产品和服务的调查,主要是通过游客问卷调查、管理人员访谈以及观察记录的方式实现。具体内容如下所述。

5.2 游客旅游目的分析

通过对回收的游客问卷分析,整理出如下对游客的旅游目的分析如图 5-1 所示

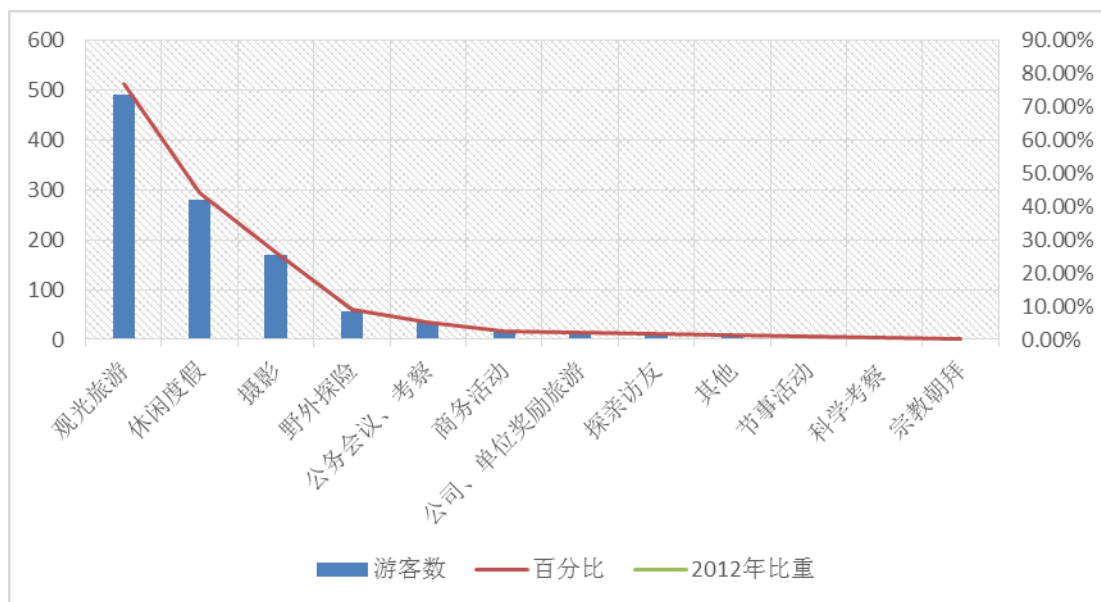


图 5-1 喀纳斯游客旅游目的的分析图

由上可以发现,在此次调查中喀纳斯景区游客的三大出游目的为观光旅游、休闲度假和摄影,分别占被调查游客总数的 77.12%、44.04%和 26.49%,最少的出游目的为节事旅游、科学考察与宗教朝拜。可见当前喀纳斯景区以大众观光游客为主。与 2012 年问卷数据对比来看,摄影与野外探险的比重有了较大的增加,而休闲度假与公司单位奖励旅游的比重有了明显的下降,一定程度上反映了喀纳斯景区优美自然风光越来越得到大家的青睐,而其内部

的休闲度假的氛围有一定的下降。

5.3 游客游览线路分析

5.3.1 旅游产品更新，冬季线路进一步推出

本年度中，大喀纳斯旅游景区旅游产品进一步更新，第一是对对禾木景区扩容、提效和优化的要求，重点完善提升敖包、喇嘛庙、图瓦人家访等特色旅游产品。第二是围绕“山花季、漂流季、摄影季、冰雪季”，承办滑翔伞国际二类赛事，增加了部分精品节庆赛事。第三是加大了旅游商品开发力度，对民族服饰、特色纪念品、手工艺品为主的旅游商品进行了开发，进一步延伸喀纳斯旅游产业链。

在旅游线路方面，核心的六条精品线路与去年仍相同，但本年度由于禾木区域公路检修，与禾木相关的大众旅游线路停开，景区开始着力打造贾登峪至禾木（贾登峪至喀纳斯）“黄金级”、喀纳斯至双湖“白金级”和喀纳斯至白湖“钻石级”三条户外徒步、科考、探险线路。

5.3.2 核心旅游区到访统计

依据喀纳斯景区历年旅游接待情况，我们从上述旅游产品体系和旅游线路中抽取喀纳斯湖、贾登峪、禾木村、白哈巴村和那仁大草原五个核心旅游区（点）对游客进行调查，并结合访谈了解游客对景区内其他旅游景点的到访情况，得出以下结果（如图 5-2）：

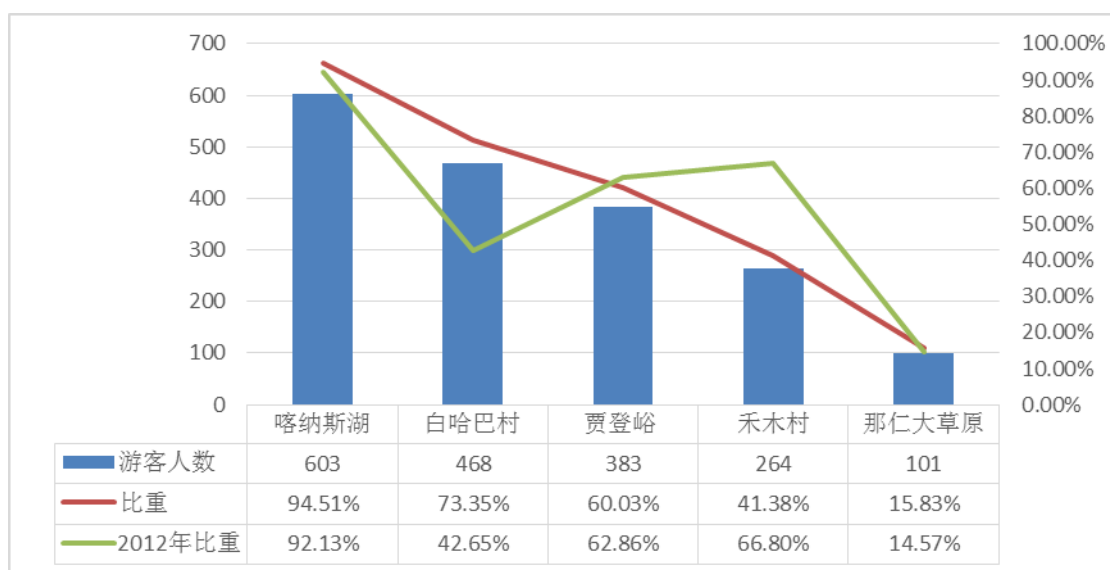


图 5-2 喀纳斯核心旅游区（点）的游客到访量

从图中可以看出，在本年度的调查中，喀纳斯湖依旧是人人所必去的景点，几乎所有的人（94.51%）都到访了此景点。禾木乡由于正在进行的公路的修整，主要的景区巴士停开，到访的游客比重比 2012 年度有了较大的下降，比重下降了约 25%，但其独特的乡村魅力仍吸引了近 40%的人骑马或者租用私家车前往；而白哈巴作为其补充在本年度的到访量比重中有了充分的提升，提升了近 30%。贾登峪作为景区的东大门和旅游接待点，有近 60%的到访量和去年持平，那仁大草原作为景区的西大门线路的重要景点，只有 15.83%的到访量，亦和去年持平，没有明显的提升。

5.4 旅游服务质量

5.4.1 旅游服务种类

对于旅游服务种类调查来看，在景区内，可以提供的旅游服务有：餐饮，住宿（星级酒店，家庭旅馆，青年旅社、毡房），特色土特产品（奶疙瘩、奶酒，酸奶等），工艺品（戈壁玉、额河奇石等），服饰皮革（少数民族服饰、皮具），娱乐（家访、酒吧等），旅游交通（区间车、马匹）、邮政服务以及其他旅游相关服务。与去年相比，旅游服务种类没有发生变化，但在旅游基础设施方面有了部分的提升，此外由于政府在旅游服务质量方面实施更加严格的监管，所以旅游服务的规范性上有了一定的提升。

5.4.2 旅游服务设施改善

在总体上来看,喀纳斯景区的旅游服务设施主要围绕景区内主要旅游景点进行布局建设,较之去年未有很大的改变,主要是在喀纳斯湖区、贾登峪、禾木和白哈巴等核心景区区域,其中主要旅游服务设施量统计如下表 5-1 所示,通过调研对比发现,在过去的一年中,喀纳斯的旅游服务设施也得到了较大的改善。

表 5-12012 年喀纳斯旅游服务设施统计表

区域	床位	餐位	区间车				游船			漂流		房车	
			车数/辆	座位/个	车型/数量	线路	船数/艘	座位/个	所属单位	艇数/条	座位/个	车数/辆	座位/个
喀纳斯	870	3320	40	1300	10 辆宇通客车（公司）	换乘-湖边	1	20	经营公司	30	240		
							18	500	大西部				
					30 辆柯斯达（公司）	换乘-观鱼台	2	64	蓝湖				
							2	24	林业局				
							1	30	消防				

贾登峪	5921	4952	95	3674		贾登峪-黑流滩机 场							
					95 辆宇通 客车（公 司）	门票站- 换乘						10	40
禾木	15000	4000	38	1362	38 辆宇通 客车（公 司）	禾木门票 站-老乡 政府							
						贾登峪- 禾木门票 站							
白哈巴	589	350	36	1290	8 辆柯斯 达（交通 厅）	换乘-白 哈巴							
					28 辆五十 铃（交通 厅）								
合 计	8880	12622	209	7626			24	633		30	240	10	40

5.4.3 旅游服务质量提升

本年度内，喀纳斯景区通过采用不同的措施以提升其旅游服务质量，主要措施有组织旅游管理人员进行培训，与主要旅游服务企业签订质量责任状、旅游从业人员培训、旅游市场秩序整治、专项旅游服务提升、旅游工作站现场服务等手段，从游客对景区整体旅游服务质

量满意度评价反馈来看，本年度景区旅游服务质量有了较大的提升。

✧ 旅游管理人员培训学习

在过去的一年内，在喀纳斯旅游管理委员会的倡导下，喀纳斯旅游服务质量有了较强的提升。首先，在这一年中，管理委员会设立了旅游管理站，管理站以“内强素质，外塑形象”为目标，积极开展了干部队伍建设。先后组织全局学习了自治区第八次党代会会议精神，新修订的《新疆维吾尔自治区旅游管理条例》，旅游执法与导游管理各项法律法规，增强了干部的政治素养和大局意识，提高了干部的旅游管理与服务能力。

此外，在五月份还进行了为期半个月的半军事化管理，开展了有针对性的旅游工作站业务提升集中学习。此外旅游局还专门成立了旅游局行风建设工作领导小组，确定了“一把手负责制”，并明确了具体工作职责，制定了《2012 年景区旅游局行风建设工作计划》，进一步健全完善了旅游局相关制度，设立了政务公开栏、党风廉政建设宣传栏，公示了机关职能、办事程序、工作制度、服务承诺内容等内容，并将制度上墙，通过积极主动将机关事务向社会公开，使旅游局的良好机关形象得到了维护，领导的重视、组织机构的建立和制度的落实，使我局行风建设工作有了组织、制度、人员上的保证。

✧ 与主要旅游服务企业签订质量责任状

在这一年中旅游管理站组织召开了景区旅游行业工作会，增强经营企业的服务意识，用旅游精细化管理标准推进管理规范年的建设；对进入景区从事旅游经营的企业（户）进行准入审核，办理经营手续，共审核办理大小企业（户）120 余家，签定了旅游服务质量责任状，缴纳了服务质量保证金；

✧ 旅游从业人员培训

在这一年中，喀纳斯管委会邀请阿勒泰地区职业技术培训中心老师在喀纳斯和贾登峪分期举办了旅游行业从业人员培训班，共计培训 500 人，全年累计培训 2000 人。此外，管理委员会还联合阿勒泰地区职业技术学院培训中心和布尔津县劳动人事局成功举办了首届景区旅游服务技能大赛，一定程度上提升了管理工作者的服务技能。此外还举办了两期宾馆饭店中高层管理人员培训班、旅游技能与市场规范化管理培训班，培训 1500 人次。通过此类

培训，对旅游从业人员的素质方面有了较大的提升。

✧ 旅游市场秩序整治

本年度中，喀纳斯管委会加大了旅游市场的整治力度。首先，加大对导游市场的监管力度；累计检查导游 26000 人次，查处导游违规 312 例，查处各种假证 295 例（含假导游证、军残证、残疾证、旅游驾驶员上岗证等），挽回经济损失 10 余万元；第二，切实执行《喀纳斯景区精细化管理实施细则》，旅游工作站开展精细化管理督查，查处市场违规行为 65 起，扣除服务质量考核分 134 分，对违规行为进行了及时督促整改，在景区内以《督察通报》书面通报，共通报 5 期，旅游市场违规行为明显改善；第三，在旺季保证各站点工作人员全天在岗，对所属区域摊位、环境卫生、旅游设施等，每天进行检查，共拆除违规搭建凉伞 500 多次。此外，从九月开始开展了以“讲诚信、促发展”为主题的检查周活动，共查处各类假证 82 例；查处价格违规行为 5 起。在本年度中旅游管理站协同工商、卫生、税务、发改等部门，共开展旅游企业大检查 5 次，重点规范经营企业（户）经营行为，打击虚假旅游广告和旅游购物欺诈。同时协同发改、执法部门完成了价格小组对餐饮、住宿、旅游商品业“价格诚信经营企业（户）”的评选工作，评选出了 10 家价格诚信经营企业（户）。从上不难看出，严格的管理措施，明确的管理标准，一定程度上抑制了喀纳斯旅游市场的恶性竞争，使得整体市场秩序稳定。

✧ 专项旅游服务提升

本年度内，景区管理委员会针对马队和家访做了专项的旅游服务提升。针对马队服务，对马队游览线路进行实地勘察调整，实现马道与人、车分离，严查甩客、欺客行为；同时设立公示牌，标明租马需知、价格、线路、安全保障、旅游投诉等有关内容，将事故隐患降到最小；此外还推行马票保险制度，减少安全纠纷，本年度中共受理马队安全投诉 5 例，游客均得到了及时救护和赔付。针对家访，景区管理委员会给景区家访经营户发放了汉、哈双语的《家访经营标准》，逐家入户检查验收，共核准 10 家，签订了《家访经营责任书》，定期入户走访、监督、服务，不断提升家访作为景区人文旅游体验项目的文化品位和服务质量。

✧ 旅游工作站提供现场服务

根据喀纳斯景区旅游局提供的资料,在 2012 年间,景区发展建立了快速旅游服务体系,使旅游服务更具人性化、更有实效性,13 个旅游工作站为游客提供及时、便捷的景点现场服务。根据统计来看,工作站累计现场解答游客咨询 10000 起,解决游客各类问题 200 件次,帮助游客找回遗失物品 60 起,找人 20 余次;此外,景区投诉电话执行 24 小时值班制度,办公室认真受理旅游咨询与投诉,快捷解决游客在景区遇到的各种问题,全心全意为游客服务。累计受理旅游投诉 69 起,结案率达到 100%;回复咨询电话 201 次,为游客解决各类问题 186 件次,内容涉及游客出行、就餐、游览、寻物等旅游各环节,游客满意度 100%。从历史数据来看(如下表 5-2),旅游投诉的次数呈现逐年增多的态势。

表 5-2 2009-2012 受理案件统计表

时间	受理案件总数(起)	处理情况	增长率
2009	17	全部结案	
2010	18	全部结案	5.88%
2011	33	全部结案	83.33%
2012	69	全部结案	109.09%

5.5 旅游地形象保护

5.5.1 旅游目的地形象

喀纳斯景区在本年度继续开发新的旅游产品,提升旅游服务质量,塑造良好旅游形象。年内喀纳斯共获得四项荣誉,分别是联合国世界旅游组织在中国的第四个旅游可持续发展观测点在景区挂牌,保护区管理局被国家林业局等七部委评为“全国自然保护区先进集体”,喀纳斯金秋国际摄影节被中国人类学民族学研究会和国际节庆协会评为“最具国际影响力民族节庆”,禾木村被中国生态文化协会评为“全国生态文化村”。此外,喀纳斯景区正在积极推进平安景区、国家生态旅游示范区、世界地质公园三大品牌创建。针对上一轮申报工

作中存在的实际问题，对拟申报的面积和范围进行了必要调整（按国土资源部批准的喀纳斯国家地质公园范围进行申报，总面积 875 平方公里），目前正在对申报材料进行修订完善。

5.5.2 喀纳斯景区旅游形象营销与宣传

在本年度内，喀纳斯景区主要通过节事宣传、旅游交易会、媒体宣传与影视传播四种不同的方式对喀纳斯景区旅游形象进行了营销与宣传，从其游客量数据及口碑反映来看，其营销与宣传达到了良好的效果。

✧ 节事宣传

本年度内，景区通过组织节事活动对其进行了整体形象营销与宣传。组织完成了第五届喀纳斯冰雪风情旅游节暨禾木杯古老滑雪狩猎比赛；2011—2012 年新疆大众滑雪系列赛暨新疆喀纳斯第四届大众野雪邀请赛；新诗写新疆·喀纳斯诗会；大美喀纳斯 浪漫山花季南航采风；广东地区主流媒体和旅行社采风、踩线活动；喀纳斯首届漂流节；2012 年全国滑翔伞锦标赛；中国·新疆喀纳斯第十二届金秋国际摄影节九项重大节庆赛事活动。完成景区成功举办“旅游规划与目的地可持续发展”国际研讨会和联合国世界旅游组织在喀纳斯建立观测点的各项协调会务工作。

✧ 旅游交易会

本年度内，景区参加了一系列的旅游交易会活动来促进营销。景区组织参加了 2012 天山天池、喀纳斯、葡萄沟、那拉提、赛里木湖“共建和谐诚信景区”恳谈会、2012 青岛国内旅游交易会、2012 阿勒泰千里旅游画廊推介会、第二届亚欧博览会、中国旅游产业博览会，共发放各类旅游宣传品 2 万余份，与统一集团开展了“亲近自然、体验喀纳斯之旅”战略营销合作。

✧ 媒体宣传

本年度中，景区通过电视、报纸、杂志、网络等媒体对其进行了包装营销。电视节目方面，在中央电视台综合频道、新闻频道、中文国际、体育频道以及各省、市、自治区上星卫视频道播发电视新闻 110 条（次），央视播出专题累计时长 1420 分钟，央视播出新闻时长 93 分钟 51 秒。在国内报纸、广播、刊物、网络刊载新闻，图片，文章 1400 篇（幅），形成

了宣传合力。此外，还在乌鲁木齐市黄金地段《新疆日报》社大楼 LED 大屏幕播出累计时长 20 小时的形象广告；在乌鲁木齐卡子湾发布高立柱广告四次；在《南方航空》《假日旅游》《航空旅游包》共刊发专版；在《新疆画报》第二届亚欧国际博览会特刊刊发喀纳斯文字、图片 6 版；同时在“乌鲁木齐晚报”、“晨报”、新华网、中新社等报刊网络媒体也对喀纳斯景区参加第二届亚欧国际博览会进行了专题报道。

◇ 影视传播

在本年度内，景区也通过影视作品对其进行了宣传。年内，电视风光片《山水喀纳斯》制作完成正式出版；6 集大型人文纪录片《净土喀纳斯》制作完成，并于 10 月 1 日至 6 日连续六天在中央电视台纪录频道播出；与新疆西部志愿十年创作团队拍摄了《最美喀纳斯》《平凡的守候》两部微电影；协助天山电影制片厂拍摄了电影《暴走呀！女人》，专题纪录片《湖怪》制作完成正式出版；专题片《喀纳斯》正在制作；十一期间央视新闻频道《江山多娇》栏目对喀纳斯进行了五场景观直播，央视各档栏目共播发新闻 9 条，形成了良好的宣传氛围。

6 旅游规划与控制

6.1 旅游规划与控制监测概况

一般来说,详尽的旅游目的地规划可以避免旅游发展的许多负面影响,因此,旅游规划与旅游可持续发展往往紧密联系在一起。而对于旅游规划的监测对规划是具有相当的辅助作用的。本次针对喀纳斯旅游规划与控制方面的监测主要监测手段为问卷调查、政府访谈及政府二手资料收集整理。旅游业与区域规划的整合,具体内容如下所述。

6.1.1 现有旅游规划或战略情况

从整体景区旅游规划情况来看,喀纳斯景区一共经历了8次整体性的规划,当前的规划为是2006年由中山大学编制的《大喀纳斯旅游区总体规划(2005-2020)》。而在2012年,针对此规划,喀纳斯管理委员会委托中山大学进行了《大喀纳斯旅游区修编提升规划》,同时还编制完成了《那仁大草原概念性总体规划》、《智慧喀纳斯总体规划》、《贾登峪旅游区整合提升规划》。其中前三者已经通过了专家组评审,而《贾登峪旅游区整合提升规划》已经自治区人民政府批准实施。此外,还编制完成贾登峪区域供水、排水、道路、环卫四个专项规划。完成禾木和铁热克提村镇规划报批。继续推进申报世界地质公园各项工作。督促广汇能源编制完成《贾登峪区域天然气配气管网规划》。争取《喀纳斯景区管理条例》通过自治区人大审批。由此来看,在过去一年中,喀纳斯景区的旅游规划得到了进一步的更新与改善。

6.1.2 公众参与旅游规划

从当前实施的《大喀纳斯旅游区修编提升规划》编制过程来看,2012年期间,中山大学规划小组对区域内的政府部门、旅游企业、社区居民、游客等核心利益相关者进行了调查,针对一些典型的个案进行了详细的调查,采用了问卷、访谈、座谈会等多种形式了解规划的需求与目标,此外,社区居民也被作为其中重点对象进行调查,规划中也充分反映了喀纳斯本地居民的愿景。

6.1.3 规划目标达成情况

在《大喀纳斯旅游区修编提升规划》中,将喀纳斯未来旅游发展划分为近期(2012-2015)、

中期（2016-2020）、远期（2021-2030）三个阶段，并描述了喀纳斯旅游发展不同阶段的目标，其中主要的规划考核目标。从当前实施情况对比来看，初步完成了旅游规划中的近期目标中游客量、旅游收入等指标。临近近期末还有 3 年，所以还有一定的提升空间，预计其应该能够顺利完成近期目标。

6.2 旅游发展的控制

目前，喀纳斯景区针对其旅游发展，在规划的引导下，实施了多项管理措施进行控制，主要控制手段为土地管理、资产管理以及规划的实施执行。

6.2.1 土地管理

✧ 建设项目用地控制

景区政府主要通过做好重点建设项目用地初审工作来控制建设项目用地。在过去一年中先后为喀纳斯景区铁热克提乡社会福利中心建设、喀纳斯景区禾木村农村社区建设、喀纳斯景区禾木乡社会福利中心建设等 28 个建设项目用地提供用地初审，面积达 6 公顷，确保了景区重大项目和重点基础设施工程的顺利实施。

✧ 土地地籍管理

景区政府还通过地籍调查，来管理控制土地。在过去一年中，国土局开展了禾木喀纳斯蒙古民族乡牧民宅基地地籍调查工作。在成立领导机构及制定工作方案的基础上，于 2012 年 4 月 24 日启动了景区牧民宅基地地籍调查工作。于 2012 年 4 月 30 日完成禾木喀纳斯蒙古民族乡 472 宗宅基地的调查与实测，在完成地籍调查工作的基础上，引导禾木喀纳斯蒙古民族乡牧民开展宅基地的登记申请。截止 10 月 18 日，收到并初审宅基地登记申请 218 份，经布尔津县国土资源依法审核后对符合登记的 124 宗宅基地进行了登记发证。此外，国土局为增加景区有效耕地面积，积极启动了铁热克提乡土地整理项目申报工作，委托新疆大学完成了项目可行性研究报告的编制。

6.2.2 资产管理

当前，喀纳斯旅游发展已步入转型跨越、提质增效的新时期、新阶段，特别是《大喀纳

斯旅游区修编提升规划》的评审通过,《贾登峪区域整合提升规划》的落地实施,标志着景区新一轮开发建设的到来。面对喀纳斯旅游发展转型升级特别是贾登峪区域基础设施建设所面临的巨大资金压力,整体负债存在一定风险。从调研情况看,2012 年景区完成总固定资产投资 2.02 亿元,其中,争取上级资金 3800 万元,招商引资到位资金 5582 万元。计划总投资金额仍有近 4.5 亿元的缺口。景区正在完善以景区投资公司为主体的融资平台,探索发行债券、资产证券化等新型融资模式,以缓解基础设施建设资金匮乏的问题。

6.2.3 实施执行

2012 年,管理委员会对规划相关内容进行了提升,制定了《大喀纳斯旅游区修编提升规划》,并根据规划中的相关内容在此后进行了一定的落实,但调研中发现规划落实过程中也存在一定的问题。

✧ 喀纳斯旅游景区管理法律依据问题

首先,喀纳斯作为一个完整的资源体系,涉及两县(布尔津县、哈巴河县)、两乡(禾木喀纳斯蒙古民族乡、铁热克提乡)、喀纳斯国家级自然保护区、阿尔泰山国有林管理局等多个行政管辖主体的管辖范围,如何形成合力,全力打造“大喀纳斯、大旅游、大品牌”,还面临诸多矛盾的影响和制约。

其次,景区管委会的“准政府”行政管理职能,只是作为地区行署的一种行政认可,缺乏相应的法律、法规支撑。由于各项管理工作缺乏法律依据,导致景区管委会及下属各职能部门“三定”方案一直未得到审批,景区规划也难以得到严格实施,各类违规、违法行为难以查处,对各项工作的开展造成一定负面影响,如在监测中访谈发现,景区环保建设交通局,在编人员只有 6 名,但却担负着环保、建设、交通等多项管理职能,由于工作任务繁重,导致精力不及而顾此失彼,难以对各项工作进行有效的管理。景区国土资源分局属于地区国土资源局派出机构,人员编制有限且无执法职能,导致景区土地违法案件难以得到及时查处,在一定程度上助长了乱圈乱占、乱搭乱建等现象的滋生和蔓延。旅游局、综合执法局等部门因无执法权限和执法资格,导致相关工作无法正常开展。因此来看,喀纳斯管理体制仍存在一定的缺陷。

✧ 外来人员参与旅游经营的问题

2012 年,针对喀纳斯村部分牧民要求参与旅游经营等问题,制定出台了《喀纳斯村旅游经营接待(餐饮、住宿)方案》和《喀纳斯村旅游经营接待(餐饮、住宿)标准》,并经地委、行署批准实施。方案中明确规定,由牧民自愿选择自主经营或者享受补助政策。经营者须具有当地户籍,且拥有自主产权房屋;严禁将房屋转包、出租他人;不得随意增建房屋,严禁搭建毡房和板皮房屋等进行经营和居住。但就目前调研情况来看,存在着部分牧民违规向外来人员出租房屋以及乱搭乱建经营接待设施的现象和苗头。受利益驱动,一些外来人员千方百计进入景区租赁牧民房屋违规经营。从管委会了解到当前喀纳斯村出租房屋的牧民共 19 户,占该村总户数的 6%。

✧ 牧民存在违规建房的问题

国土资源部门在开展 2012 年度土地利用变更调查与遥感监测工作中,发现喀纳斯新村未批先建的遥感检测图斑 4 个,宗地 3 个,面积 8.7 亩,其中包括窝斯攀、乌兰等牧民。其中,窝斯攀在喀纳斯老村已有一宗宅基地的情况下,在喀纳斯新村非法占据 1 宗宅基地,并经非法转让取得 1 宗宅基地,合计 1224.7 平方米。2013 年 4 月,布尔津县国土资源局对窝斯攀非法占地行为进行了立案查处,但案件查处至听证程序时,窝斯攀先后以各种理由申请延期听证,至今未果。目前,景区违法违规建房的势头有所抬头,且有进一步蔓延的趋势,大部分牧民对此持观望态度,一定程度可能造成连锁反应,进而严重影响景区规划的执行和落实。

7 健康与安全

7.1 健康与安全相关监测概况

健康与安全是旅游者重点关注的问题，将直接影响旅游决策。根据《旅游目的地可持续发展指标》，旅游业中的健康与安全问题主要从管理部门、游客、旅游企业和当地社区四个主体维度予以考虑，具体包括食品卫生安全、环境安全、社区安全、游客安全等。本次对喀纳斯景区健康与安全的监测工作主要通过游客及社区问卷和居民访谈、政府访谈及二手资料收集完成，其监测情况如下所述。

7.2 食品卫生

食品卫生安全对游客能否在旅游目的地顺利游览至为重要，不但影响到游客的身体健康，更影响到游客对旅游目的地的安全感知和评价。根据本年度问卷统计来看（如图 7-1），治安和卫生并非游客最为关心的问题，分别有 21.26%和 13.7%的游客进行了选择，这说明游客对于食品卫生安全状况的关注程度处于较低的水平。而 2012 年分别有 22.83%和 16.54%的游客关注了治安和卫生问题，这说明今年游客对这两个问题的关注程度在逐渐下降，也说明大喀纳斯景区通过采取一系列措施其治安和卫生状况逐年获得游客的认可。同时，根据旅游局的投诉受理及处理统计，在游客的投诉中，食品安全问题所占的比例较少。

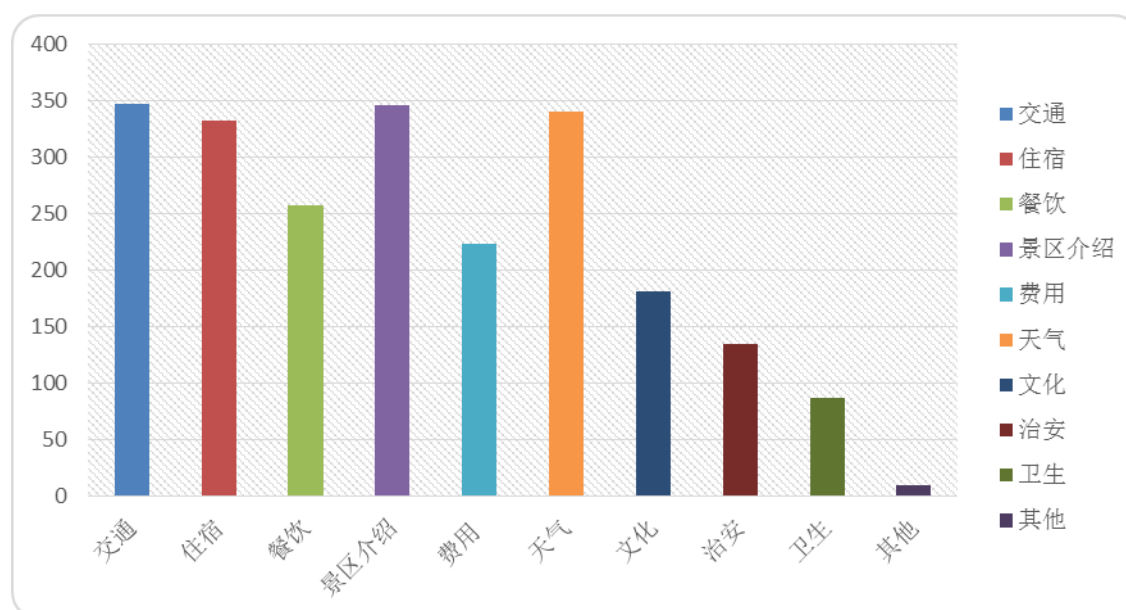


图 7-1 游客最希望获取的关于喀纳斯的信息统计图

数据来源：《2013 年 9 月喀纳斯游客问卷调查》

根据综合执法局和其他相关部门提供的资料可知，相比于 2011 年，2012 年大喀纳斯景区在食品安全卫生方面加大了监管和处罚力度，以确保游客在此能够获得安全的游览环境。在 2013 年，相关部门在 2012 年的基础上仍然将食品卫生安全作为重点工作进行常抓不懈。

7.3 环境安全

7.3.1 自然环境质量评价

对于游客而言，从图 7-1 可以看出，游客在出行前对目的地的卫生状况信息的收集和了解并不如景区介绍、住宿、交通等，但是对于“天气”信息的获取积极性相对较高，说明游客在出行时比较关心天气变化或者气候差异，以便提早预防因环境不适而产生的疾病。通过游客访谈可知，绝大多数的游客对喀纳斯的自然环境非常满意，包括空气质量、水体情况、卫生状况以及安静程度，这说明绝大多数游客对喀纳斯的自然环境状况满意度非常高。但是，由于我们监测的时间选择在九月中下旬，天气转冷，有些游客不太适应较低的气温，对此有一定的不满意。

对于当地社区居民而言，他们对于自己家乡的自然环境非常自豪，满意度非常高。当然

对于有些社区居民也表现出了一定的担忧，主要表现在游艇是否对喀纳斯湖水质有所影响，游客的增多是否带来更多的垃圾以及客栈、餐饮等经营户是否对环境带来更多的负面影响等。

7.3.2 环境安全维护与治理

本年度，喀纳斯景区相关部门在环境安全维护与治理方面采取了更为严厉的措施，主要包括以下几个方面。第一，严格落实项目建设环境保护“三同时”制度，本年度内，景区50个自建项目已全部补办环评手续；加大环境执法力度，在旅游旺季到来之前，联合地区环保局开展环境执法检查，对相关手续不完备，乱排、偷排污水以及游艇、区间车尾气排放不达标等污染环境的行为进行严肃查处。第二，对喀纳斯湖泊环境保护试点、天保工程二期等重点项目进行了落地实施。其中，喀纳斯湖湖泊环境保护试点项目，总投资1200万元（其中，景区配套400万元），主要完成喀纳斯湖周边生态治理、下湖口生活污水处理厂改造、生活垃圾收集（果皮箱1000个、垃圾桶200个）以及哈纳斯村100户农村厕所改造等。第三，成立了景区爱卫办，制定印发了长效化、制度化的环境整治方案。在日常环卫保洁工作的基础上，每月开展一次环境卫生专项整治活动，对景区道路沿线、各景点、木栈道及两乡各村房前屋后的垃圾进行彻底清理。第四，结合LNG加气站建设，推进景区区间车的更新换代，进一步提高区间车气化率。要合理选定屠宰场地址，实行牲畜定点屠宰，严防出现新的污染源。

7.4 社区安全

社区健康与安全不仅关系到当地社区居民的利益，同时对于游客的安全也起到重要的作用。本年度内，喀纳斯景区的社区安全基本没有出现问题。监测小组在对社区居民的访谈中发现，居民普遍认为自家的卫生条件良好，以目前的卫生水平足以开设家庭旅馆并提供餐饮服务，由此可以看出当地居民对自身的健康与卫生状况比较自信，也反映出他们参与旅游发展的积极性比较高。当地社区居民反应的主要问题集中在冬季由于大雪封山，如果遇到重大疾病到县城看病不方便，这是对其身体健康安全最大的威胁。

7.5 游客安全

游客的安全感知主要体现在四个方面：旅游信息收集的行为特征、游客出行的目的偏好、住宿设施的选择以及对卫生环境的满意度评价。

在旅游信息的偏好方面，与 2012 年相比，今年游客对治安和卫生两方面的信息关注度已经在下降：治安方面由 2012 年的 22.83% 的游客选择降到了今年的 21.26%，而卫生方面则由 2012 年的 16.54% 将到了今年的 13.7%，这说明游客对于卫生安全状况的关注程度处于较低的水平，同时也说明喀纳斯景区在卫生安全方面所开展的工作已经得到了越来越多的游客认可。由上图 5-1 可知，游客的出游目的基本集中在观光旅游、休闲度假、摄影三个方面，相对来讲安全性比较高，而对危险性较高的野外探险仅有 57 人有此目的，这基本上与 2012 年的情况相同，说明绝大多数游客的安全意识较高，基本不会参与危险系数较高的游览项目。在游客对景区安全状况的满意度评价方面，本次调查数据显示，游客对社会治安与居民态度的评价均值分别达到 4.27 与 4.19，与 2012 年（两项的评价均值分别为 4.17 和 3.99）相比均有一定幅度的提升，这说明游客对于景区的安全满意度有较高的认同。

8 旅游资源、环境保护

8.1 旅游资源与环境保护监测概况

旅游资源与环境保护是景观得以保持的基础，也是景区赖以可持续发展的基础。本次对于旅游资源及环境保护观测主要基于景区管理局相关部门提供的二手数据和访谈资料，监测所得结果如下所述。

8.2 环境质量监测与治理

8.2.1 水环境质量

喀纳斯景区内地表水水质优良，在水质保护方面，景区为了确保喀纳斯湖水的优质，防止出现新的污染源，景区管理局在 2013 年年抓好喀纳斯湖泊环境保护试点项目落地实施；对游艇和区间车进行严格检测，建立检测档案，凡是尾气排放不达标的游艇和区间车一律不得投入营运。

8.2.2 污水处理

在 2012 年，景区完成贾登峪二区至污水厂 2 公里道路项目建设，对于贾登峪的污水处理起到重要作用。同时，景区开始严格落实“三同时”制度，在督促现有经营单位抓紧补办环保审批手续的同时，严把建设项目环保审批关，凡是环境影响评价未通过的项目，一律不得开工建设。加大环境执法力度，严查乱排、偷排污水等各类污染环境的行为。

8.2.3 固体废弃物处理

固体废弃物的处理直接影响到喀纳斯景区的环境卫生状况，最终影响游客的满意度。为了提高游客的满意度，获得景区的可持续发展，景区政府采取了一系列措施改善废弃物处理。第一，初步建立了完善的环卫设施，主要采用填埋式处理各类固体废弃物，贾登峪、喀纳斯湖区部分宾馆的环卫设施已经初步完善，对废弃物品和垃圾可以进行集中收集和处理；沿线也已经配备了一定数量的垃圾箱、垃圾转运站、公厕等环卫设施。第二，为加强环境卫生管理，2013 年景区在各村配置压缩垃圾车 2 台、小型流动垃圾收集车 4 辆、吸粪车 2 台、垃

圾中转站 1 座、环保果皮箱 500 个、道路洒水车 2 辆；在喀纳斯村实施湖泊生态治理、生活污水处理厂改造、生活垃圾收集（果皮箱 1000、垃圾桶 200）、100 户农村厕所改造。合理选定屠宰场地址，实行牲畜定点屠宰，严防出现新的污染源。目前景区的环卫设施数量尚难满足游客的需求，白哈巴村和那仁等景区内主要节点还没有建设相应的环卫设施。

8.2.4 植被覆盖

当前，喀纳斯景区植被类型多样，有森林、草甸、草原、灌丛、高山植被、石生植被、沼泽和水生植被等 7 种植被型，并有明显的垂直分布规律，自下而上划分为中山森林草甸带、亚高山草甸带、高山草甸带、高山冻原植被带、永久性雪山等 5 个带。森林、灌丛和草甸是景区生态系统的主体，对区域生态环境产生着深刻影响。景区森林植被为南泰加林型山地森林，是我国独有的西西伯利亚泰加林生态系统的代表。森林植被主要分布在海拔 2800m 以下阴坡、半阴坡及沟谷。森林覆盖率为 17.8%，包括灌木林在内的覆盖率为 25.8%。

为了确保景区的植被类型多样性，保护生态植被，在本年度中景区相关部门开展了大量的工作。第一，完成阿尔泰山森林生态系统定位研究站、标准气象观测场及综合观测塔建设。第二，争取并落实天然林保护二期、重点公益林、保护区能力建设、喀纳斯湖泊保护试点等项目资金 1820 万元。第三，落实草原生态保护补助奖励机制，发放水源涵养区禁牧补助资金和草畜平衡资金 1700 万元。第四，强化管护体系建设，开展清山清边活动 23 次，乱采滥挖、非法抵边等不法行为得到有效遏制。

8.2.5 大气环境

喀纳斯景区大部分区域仍保持着较为原始的状态，居民相对稀少，绝大多数地域为无人区，空气清新，阴离子浓度高，粉尘、降尘量低，没有空气污染源，符合国家 GB3095-1996 大气环境 I 级标准。本年度中，为了确保大气环境质量，景区对区间车进行严格检测，建立检测档案，凡是尾气排放不达标的游艇和区间车一律不得投入营运。结合 LNG 加气站建设，加快推进景区区间车的更新换代，进一步提高区间车气化率。

8.2.6 土壤环境

喀纳斯景区土壤包括山地沼泽土、暗色草甸土、山地黑钙土、棕色针叶林土、高山和亚

高山草甸土、山地冰沼土、高山石漠土等 8 个类型。其中棕色针叶林土、草甸土、石漠土、冰沼土是保护区最主要的土壤类型，面积占保护区各土壤类型总面积的 95% 以上。由于喀纳斯景区人为活动稀少，没有工矿污染企业，土壤环境基本没有受到污染和破坏。

8.2.7 声学环境

喀纳斯环境优美，环境静谧。喀纳斯景区目前的噪声主要来源于宾馆、饭店、商店、文化娱乐设施、居民生活和车辆运行所产生，分为生活噪声和交通噪声。除喀纳斯湖湖口区域受旅游带来的局部影响外，基本没有其它噪声源，符合国家 GB12348-90 噪声 I 级标准。

8.3 环境保护项目建设

为了保护喀纳斯景区的资源环境，景区相关部门投入了大量资金建设环境保护项目（如下表），与 2011 年相比，2012 年喀纳斯景区对资源环境保护项目进行了进一步的投资维护。

表 8-1 2012 年喀纳斯景区资源环境保护项目一览表

序号	建设单位	项目名称	计划总投资（万）	累计完成投资（万）
1	喀纳斯景区环保建设交通局	喀纳斯景区下湖口拆迁	1660	0
2	喀纳斯景区环保建设交通局	亚洲开发银行贷款植被恢复项目	2000	0
3	喀纳斯景区环保建设交通局	国家遗产地白哈巴森林公园	2860	490
4	布尔津林场	贾登峪林场管护站	356	28
5	喀纳斯景区环保建设交通局	月亮湾星级厕所	75	40
6	喀纳斯景区环保建设交通局	大气环境背景站	500	470
7	喀纳斯景区环保建设交通局	亚行环卫设备	512	512
8	喀纳斯景区环保建设交通局	天保 2011 年一道弯管理房建设	200	200
9	阿勒泰广汇天然气公司	贾登峪加气站扩建	55	55
10	喀纳斯景区环保建设交通局	亚行垃圾填埋场	50	50
11	景区国土资源局	地质遗迹保护项目	160	160
12	喀纳斯景区环保建设交通局	白哈巴村叶耕德河小流域水土保持治理	190	110
13	喀纳斯景区环保建设交通局	亚行垃圾填埋场机械、转运站厕所、供电设备	488	488
14	喀纳斯景区环保建设交通局	亚行垃圾收集及处理设备	367	367
15	喀纳斯景区环保建设交通局	亚行监测站设备	316	316
合计			9789	3286

9 总结

从此次喀纳斯旅游监测情况来看，可以得到以下几个主要结论：

9.1 旅游与社区：社区参与存在村村差异，社区感知认可度有所提高

从对社区参与情况调查来看，随着当地旅游的发展，居民参与旅游的意识和技术等普遍提高，社区参与旅游的形式也开始较为固定，各村由于旅游发展状况不同，参与的情况及所面临的问题也出现一些差异。同时，在旅游影响的感知上，社区居民在经济影响与环境影响认可上有所提高，而在社会影响的认可度上有所下降，对基础设施的不满意度、医疗的不满意度，交通拥挤的感知上有所提升，对文化影响方面则认可度变化不大。

9.2 旅游经济收益：旅游经济下滑，部分企业发展受挫

从对喀纳斯整体景区及旅游企业的调查来看，旅游收入已经成为喀纳斯景区的重要经济来源，但 2013 年受国内经济发展趋势性放缓、公务游受相关政策抑制以及新疆复杂的维稳形势等不利因素的影响，喀纳斯景区旅游人数、门票收入各项指标明显回落。旅游业虽然增加许多就业机会，当给当地人带来的就业机会仍较少。此外，调研中发现贾登峪及喀纳斯村企业存在不规范竞争，而铁热克提乡由于游客量稀少旅游企业经济效益受阻，各区域旅游企业发展仍存在不同的问题。

9.3 游客满意度：整体满意度较高，旅游服务价格问题值得关注

从对喀纳斯的游客调查来看，当前游客对喀纳斯旅游满意度相对较高。对喀纳斯资源各项指标评分均较高，尤其是自然风光深入人心，但对人文体验与活动开发的评价相对较低；对喀纳斯旅游服务的各项指标评分则普遍偏低，尤其是餐饮与住宿的质量与价格以及交通等问题影响了整体满意度。同时，由于路途遥远、费用较高等问题，游客在离境时的推荐意愿远高于重游意愿。同时，游客对于景区目前的建设与管理问题持包容态度，但期待地区与景

区的进一步发展，尤其是服务的标准化、规范化以及质量提升。

9.4 旅游产品和服务：旅游产品更新，旅游服务设施改善

从对喀纳斯旅游产品和服务的调查来看，喀纳斯当前游客到访目的存在一定改变，摄影与野外探险的游客有所增多，而度假和单位旅游游客有所减少。在旅游线路方面，当前禾木由于公路建设原因而暂停营业，转而白哈巴线路较为火热，新线路方面，喀纳斯景区也正在积极推进冬季旅游线路及三条黄金徒步线路。在过去一年中，各区域旅游服务设施也有不同程度的改善，新成立了旅游管理站，针对旅游服务质量进行把关监控，使得旅游服务质量有所提升。喀纳斯通过旅游节事、旅游交易会、媒体宣传与影视传播等多种形式进一步扩大了景区的知名度，同时也获得了四项新的荣誉。

9.5 旅游规划与控制：新规划落地实施，发展控制存在一定难题

从对喀纳斯当前的旅游规划及旅游发展控制的调查来看，喀纳斯在过去一年针对《大喀纳斯旅游区总体规划（2005-2020）》进行了修编提升，制定完成了《大喀纳斯旅游区修编提升规划》，规划进一步明确了今后的发展方向，政府部门也成立了专门的小组促进规划的落地实施。对于喀纳斯的发展控制，当前喀纳斯管委会主要采用土地控制的方式，但由于景区政府的管理体制问题，其发展控制存在一定缺陷。从景区资产管理来看，喀纳斯 2012 年固定资产投资达到近 2 亿元，尚未完成仍有 4.5 亿元，但是相对于仅仅 1 亿元的门票收入，其资产投资存在一定的风险，需要开源节流。对于喀纳斯的旅游交通，外部交通方面变化不大，内部交通方面，在基础设施上有所提升，景区内环线的道路正在或准备开始新建。

9.6 健康与安全：健康与安全情况良好，预警机制有待强化

从对喀纳斯旅游的健康与安全情况调查来看，喀纳斯景区内的游客、居民和企业从业人员未发生重大的食品、食物中毒及投诉事件，食品安全工作以及预防措施开展的比较充分。大部分游客参与的旅游活动性质较为温和，游客对治安信息的收集热情不高，游客普遍对景区治安状况给予了好评，但也存在一定的问题，主要体现在部分游客对景区内的“黑车”经营和新疆偶尔出现的“暴力”事件所带来的安全表示了一定担忧。目前，景区内的自然灾害主要为火灾、洪灾、雪灾、冰雹以及大风天气，随着徒步旅游的升温，预警机制以及应急方

案有待强化；人为安全隐患主要反映在民族暴力犯罪事件以及景区内交通事故的发生，而维持政治稳定和预防交通事故的发生一直以来都是景区的重点工作。

9.7 旅游及资源环境保护：环境质量良好，破坏现象需引起重视

从对喀纳斯景区内资源环境调查情况来看，目前景区环境质量良好，大气、土壤、水质均未受到污染，符合国家一级标准；各类动植物资源得到较好保护，生态环境良好；各类违规建筑也逐步进行拆除。游客与社区居民对喀纳斯的自然生态评价较高，但仍存在部分游客及社区经营户破坏环境的现象。因此，需要进一步注重并加强对居民（尤其是经营户）和游客的资源环境保护教育，并采取激励措施。

Monitoring Report on the Sustainable Tourism Development of Kanas

Kanas Management Committee

**Monitoring Center for UNWTO Sustainable Tourism
Observatories**

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1 Foreword

The monitoring on the sustainable tourism development of Kanas lasted for 12 days, starting from September 14, 2013 and ended on September 25, 2013. Under the active coordination of Kanas Management Committee, the Monitoring Center for UNWTO Sustainable Tourism Observatories (UNWTO MCSTO for short, hereinafter referred to as the “Monitoring Center”) monitored the sustainable development indicators of Kanas. The monitoring group consists of nine members, of which one is a teacher, five are doctors, and three are masters. Divided into four subgroups (tourist subgroup, government subgroup, community subgroup and enterprise subgroup), it collected Kanas-related secondary data by randomly surveying the tourists in some major scenic zones and stopovers, such as Kanas airport, Jiadenyu ticket office, Kanas lake region, Kanas tourist center, Baihaba village, and Tielieketi ticket office; talking with the community residents door to door in Kanas village, Baihaba village and Tielieketi township; and visiting tourist enterprises in Jiadenyu, Kanas village, Baihaba and Tielieketi as well as related departments like Kanas Management Committee, Tielieketi township government and Baihaba village committee.

A lot of primary data concerning tourists, community residents, tourist enterprises and local governments have been collected in monitoring. With regard to tourists, 680 questionnaires were issued, with 633 effective, accounting for 93.1%. To assist analysis, some tourists and tour guides were interviewed on key issues. With regard to community residents, 56 community households from 3 communities, including new and old Kanas villages, Baihaba village and Tielieketi township, were interviewed through door to door or semi-structured questionnaire mode. With regard to tourist enterprises, a sample survey on main business form was conducted in 4 Kanas’s communities. During the survey, 36 operators, engaged in accommodation operation, restaurants, souvenir shops and retailing, were interviewed. With regard to government, under the help of Kanas management committee,

data in related to recent planning, work reports, tourists, communities and enterprise statistics of Kanas were collected.

According to the data collected and the monitoring of last year, this monitoring report is divided into seven parts, tourism and community, economic benefit from tourism, tourist satisfaction, tourism product and service, tourism planning and control, health and safety and tourism and resource environment protection.

2 Tourism and community

2.1 Monitoring of tourism and community

Three communities in Kanas scenic zone, including new and old Kanas villages, Baihaba village and Tielieketi township (local township government), are involved in the community monitoring. Hemu village is not included due to road repair and traffic inconvenience. The community survey was carried out by means of in-depth interview and semi-structured questionnaire. To understand the basic situation of community, before household survey to each community, one or two key persons were deeply interviewed. Community residents of different tourism engagement types were interviewed on a semi-structured questionnaire basis in order to understand the resident's attitude and perception towards tourism. In this survey, 56 community households were interviewed. See table 2-1 for household distribution of all villages:

Table 2-1 Number of interview households

Village name	Number of households	Tourism engagement type	Remarks
Baihaba	16	Horse renting, house renting, guesthouse running, street vendor, and other business than tourism	
Kanas	28	Horse renting, house renting, guesthouse running, Home visiting, street vendor, and other business than tourism	
Tielieketi	12	Guesthouse running, handicraft making, and other business than tourism	
Total	56. The residents here include some foreign operators. It is hard to decide whether he is a foreign operator or not at the beginning of interview due to lack of tour guide.		

Note: The number of interview households is subject to the tourism development of that

community. For example, as the tourism development of Kanas is relatively mature, the residents' opinions differ from one another. So, more opinions are required. While the tourism development of Tielieketi is still at the early stage, the opinions are basically the same. So, the residents' opinions are rather representative.

2.2 Basic situation of community

The communities involved in the survey are those directly engaged in tourism development. They are Kanas village, Baihaba village and the location of Tielieketi township government. Hemu village is not included in the survey due to traffic limitation and hard access. To get to know the basic situation of all villages, key persons of these villages were interviewed and secondary data were collected. According to the basic situation of several communities, no big change is witnessed compared with last year: As for income composition, tourism still dominates the role for Kanas residents, followed by stock raising and others. The dependence on tourism of old village is much stronger than that of new village; stock raising is the main income source for residents in Baihaba, followed by tourism. However, this composition has been changed among some residents, with the rise of proportion to tourist income. But now, tourism can't replace traditional industry. Tourism in Tielieketi township is still in zero state. Stock raising is the main income source, followed by agriculture. In terms of infrastructure construction, the villages are provided with water supply, power supply and road facilities, but new Kanas village still has such problems like failure of supplying water to some households, voltage instability and water shortage in winter. The infrastructure has improved compared with last year and all works are in process. Residents' dissatisfaction with poor medical facility and inconvenience to go to school is relatively prominent. The tourism development basically maintains a balance state compared with its development before, but some residents have begun to reflect on the government, scenic zone and their own behaviors.

2.3 Community engagement

2.3.1 Tourism engagement of all communities

Different communities have different ways of tourism engagement. The proportion of

old Kanas village to tourism engagement is the highest, followed by new Kanas village and Baihaba, and the proportion of Tielieketi is the lowest. As for the ways of engagement, now, the community residents take part in tourism through the following ways: Horse renting, house renting, guesthouse running (including food), restaurant running, Home visiting, street vendor, selling of dairy products, handicraft making, etc. Some residents haven't involved themselves in tourism.

See table 2-2 for tourism engagement and incomes of respondents of all communities

Table 2- Tourism engagement and incomes of respondents of all communities

Way of engagement	Kanas (28)		Baihaba (16)		Tielieketi (12)	
	Number of households	Annual income	Number of households	Annual income	Number of households	Annual income
Horse renting	8	3000 – 15,000	0	3000 – 15,000	0	
House renting	6	40,000 – 150,000	2	20,000 – 70,000	0	
Guesthouse	5	10,000 – 100,000	8	3000 – 50,000	3	Few
Restaurant	2	Over 10,000	2	10,000 – 20,000	0	
Home visiting	2	10,000 – 30,000			0	
Street vendor	3	5,000 – 10,000	4	2,000 – 5,000	0	
Retailing	2	2,000 – 10,000	2	1,000 – 4,000	2	2,000 – 20,000

Handmaking	0		3	Few	2	Few
Business other than tourism	10		10	0	10	

Note: The income of retailing is not fixed, such as selling dairy product at home; income from management committee means the income from the work of management committee or scenic zone;

2.3.2 Educational level of community residents

It can be found from the survey that the educational levels of herdsmen are not high. 69.6% of the respondents received education of less than nine years, of which 25% received education of less than six years. So, many of them don't know Chinese and only a few can speak several simple words, such as "hello" and "thank you" in Chinese. Of those with lower educational level, the proportion of men engaged in tourism is higher than that of women. Those receiving education of over nine years are engaged in tourism by various ways, such as Home visiting, guesthouse running, and working in the management committee in scenic zone. The education level limits the depth of herdsmen's involvement in tourism. According to interviews and survey data, herdsmen with higher educational level will choose new business which requires higher level of operation and culture to gain income while those with lower educational level may resort to being a sanitation worker, Home visiting performer (without culture interpretation) or kitchen worker.

We can see the training the management committee offered to residents from the materials it provided. To improve the tourism engagement ability and overall quality of local residents, the management committee organized a series of tourism trainings to more than 3500 residents, including horse renting, guesthouse running, language training, handicraft making and etiquette training. The service awareness and level of tourism-related employees

are obviously increased. However, according to the respondents, they received no tourism-related training last year and only a few of them took part in fire prevention training.

2.3.3 Community expectation towards tourism engagement

Upon interview, many residents hope to be part of tourism by the following ways: (1) Guesthouse running, for it can get high income; (2) Home visiting, for it can promote local national culture and characteristics and get high income; (3) Horse renting, because of low cost and risk; (4) House renting, for it can get fixed income without cost; and (5) Being a tour guide, for it can earn more money.

Strengths of local residents to be part of tourism: (1) Both accommodation facility and food have local characteristics and have their own houses; (2) Familiar with local resources and environment; and (3) Have their own horses.

Weaknesses: (1) Hard to communicate with tourists; (2) Lack of business operation experience and technology; and (3) Lack of interpersonal relationship and hard to attract tourists.

Most of residents hope to take part in tourism training, particularly the language training and operation technology training. Many of them hope to learn how to be a restaurant runner or tour guide. From this, it can be concluded that the awareness and initiative of resident's tourism engagement is on the rise.

2.4 Perception of community impact of tourism

2.4.1 Economic impact of tourism

Upon questionnaire analysis (see figure 2-1), the resident perception to economic impact of Kanas scenic zone brought by tourism is obvious. The average values of economic growth, employment increase, price hike and increase of living standard are above 3.5. The community residents obviously perceive the impact on economic and life brought by tourism. The local residents basically hold opposite attitudes towards these two negative options: Tourism widens the gap between the rich and the poor, and only a few benefits from tourism.

Those who support these two options are relatively objective. They believe that the main reason leading to these two results lies in individual initiative. For tourism bringing more investment and consumption, residents hold neutral attitude and have weak perception because in their minds, investment is the matter of government.

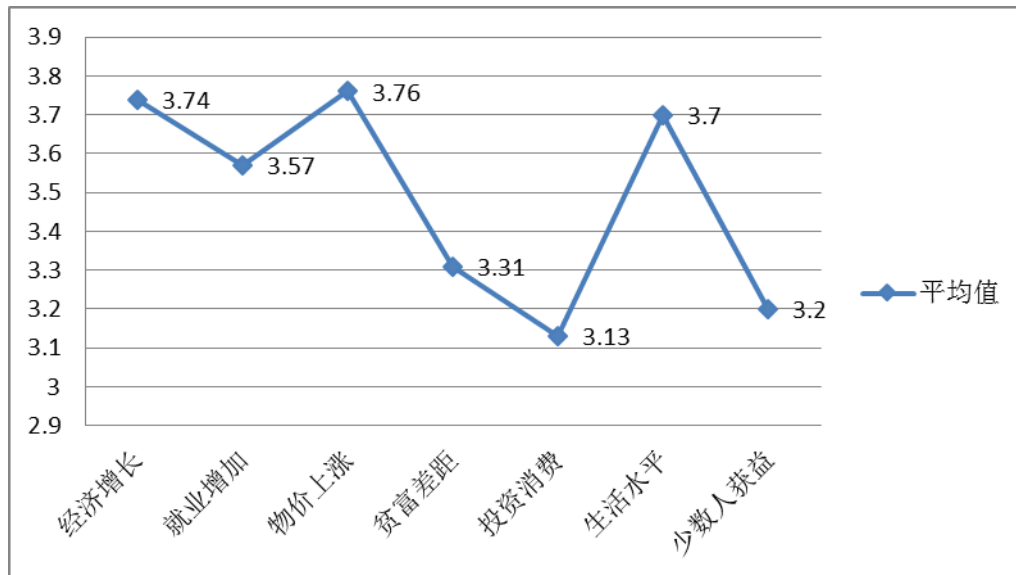


Table 2-1 Evaluation chart for resident perception to economic impact

平均值 Average value

经济增长 Economic growth

就业增加 Employment increase

物价上涨 Price hike

贫富差距 Gap between the rich and the poor

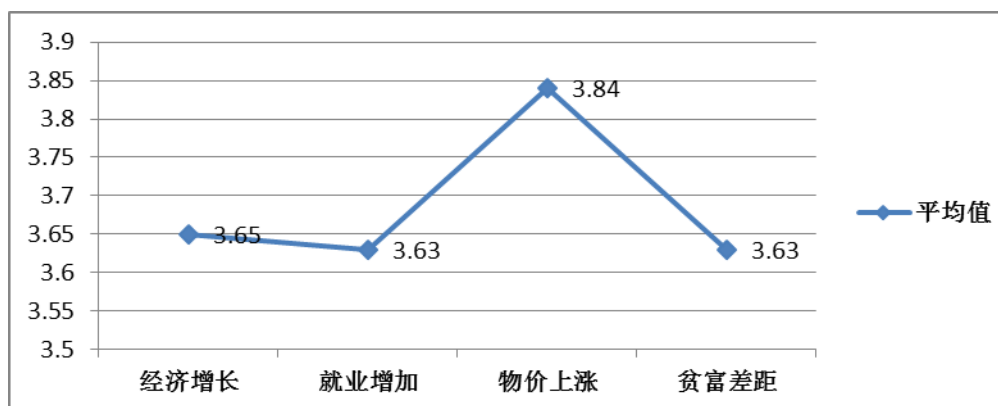
投资消费 Investment & consumption

生活水平 Living standard

少数人获益 Benefit a few

Compared with the monitoring date of 2012 (figure 2-2), the perception to economic growth of 2013 is increased, which indicates the steady growth of tourism economy of Kanas; the slight decrease of perception to employment increase may be the result of losing sense of curiosity to some newly-added jobs. During the survey, we found that many villagers quit

their jobs as a sanitation worker or forest protection worker in the management committee and these jobs were taken by young outsiders instead; the decrease of perception to price hike is the result of the trend of getting used to high prices; and the decrease of perception to the gap between the rich and the poor indicates the gap is narrowing.



平均值 Average value

经济增长 Economic growth

就业增加 Employment increase

物价上涨 Price hike

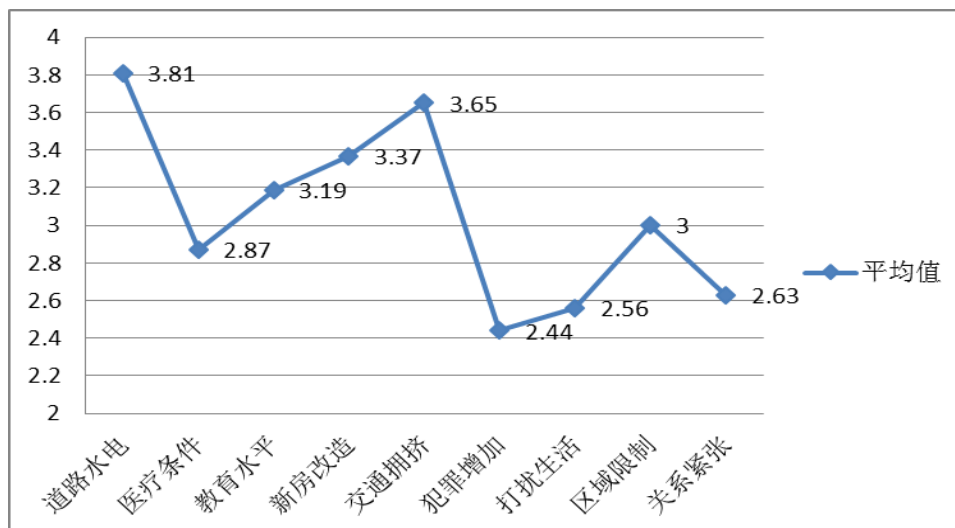
贫富差距 Gap between the rich and the poor

Figure 2-2 Evaluation chart for resident perception to economic impact of 2012

2.4.2 Social impact of tourism

According to the questionnaire analysis (see figure 2-3), the high average values of road, water & power, educational level, and house renovation in the social impact of tourism indicate that tourism brings positive impacts on social infrastructure; and the low average values of crime increase, life disturbance, resource limitation and tense relation indicate that tourism hasn't brought these negative impacts on society. Here are things that need attention: the low average value of positive option (medical level) and the high average value of negative option (traffic congestion). The general dissatisfaction of residents with medical

level is an issue of people's livelihood of Kanas community we need to pay attention to. Although the resident perception to traffic congestion is strong, it brings a lot of impact on resident's daily life.



平均值 Average value

道路水电 Road water and power supply

教育水平 Educational level

新房改造 New house renovation

交通拥挤 Traffic congestion

犯罪增加 Crime increase

打扰生活 Life disturbance

区域限制 Regional limitation

关系紧张 Tense relation

Figure 2-3 General average values of perception to social impacts of tourism

Compared with the data of 2012 (see figure 2-4), we found that the perception to road, water & power was slightly decreased compared with last year. This indicates that the resident's satisfaction with these infrastructure projects are affected as time goes by and their sense of curiosity declines. Medical condition is still the option with lower average value among social impacts. As the average value is lower than last year, it is a pressing need to improve the local medical level. The result of the average value of educational level lower

than last year corresponds to the gradual loss of students within the region. Although the average value of educational level is not low, it needs to remain vigilant. The average value of house building is lower than last year. As the number of tourists grows, the traffic congestion gets worse than last year. Generally speaking, as the time of hardware facility construction delays, the resident's satisfaction drops year by year. This satisfaction gets worse with the failure of addressing the livelihood issues related to resident's daily life. In view of this, more software facilities related to public life should be taken into account in Kanas's future policy orientation, such as introducing good doctors and teachers.

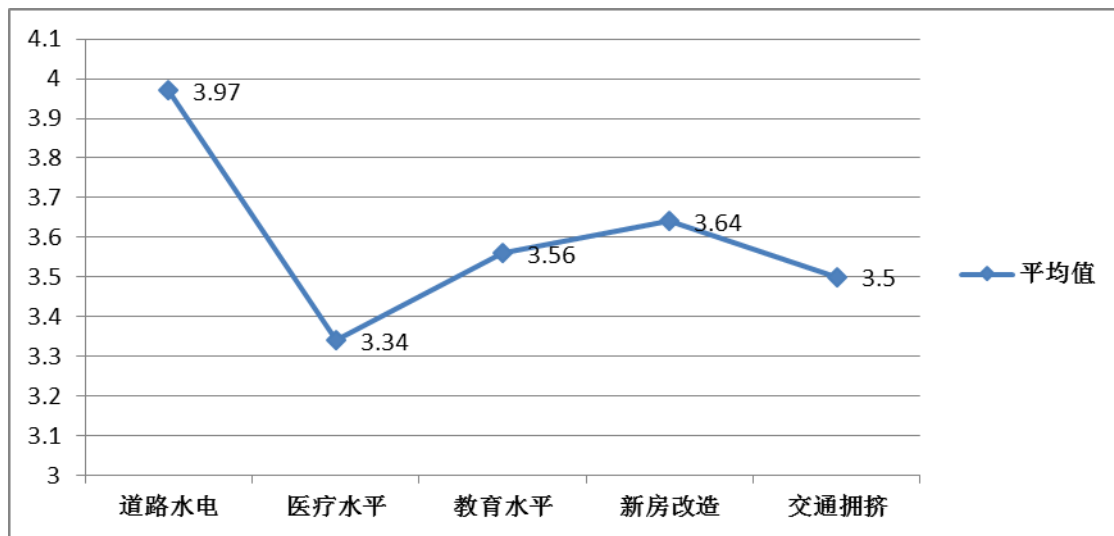


Figure 2-4 Evaluation chart for resident perception to social impact of 2012

平均值 Average value

医疗水平 Medical level

道路水电 Road water and power supply

教育水平 Educational level

新房改造 New house renovation

交通拥挤 Traffic congestion

2.4.3 Community culture impact of tourism

As for the culture impact of tourism, according to the questionnaire analysis (see figure 2-5), the resident perception to cultural exchange is high. This indicates that the

communication effect between residents and tourists is good; the low perception to cultural destruction indicates that the residents have enough confidence in local national culture and the foreign culture erosion brought by tourists is not apparent. The moderate perception to festival activities shows the weak impact on festivals by tourism. As the national handicraft market for tourists hasn't been formed, the handicrafts in the scenic zone are not unique and handicrafts in with local characteristics have not been introduced to the market, the resident perception to the development of national handicrafts is relatively weak. Generally speaking, the traditional national culture is well-protected and further efforts shall be made to develop national festival market and national handicraft market.

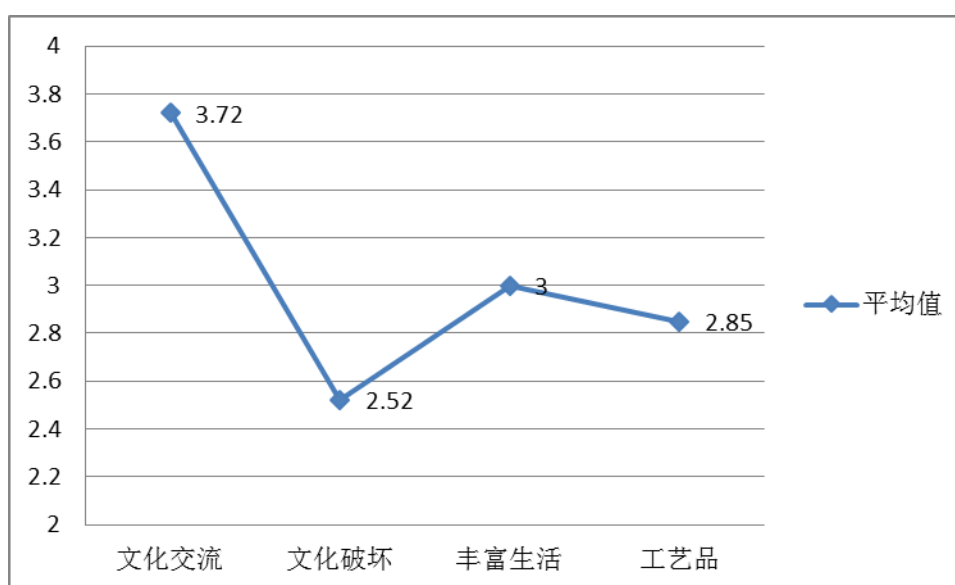


Figure 2-5 General average values of perception to culture impact of tourism

平均值 Average value

文化交流 Cultural exchange

文化破坏 Cultural destruction

丰富生活 Life diversity

工艺品 Handicraft

It can be seen from data of 2012 (see figure 2-6) that no big change occurs in cultural exchange. This indicates that good cultural exchange state is maintained each year. The less

cultural destruction demonstrates that residents take a firmer stance in maintaining local national culture. The lower average value of life diversity than last year indicates that the resident perception to festival activities goes lower than last year. This is because the resident's sense of curiosity to festival activities drops as they become part of people's life.

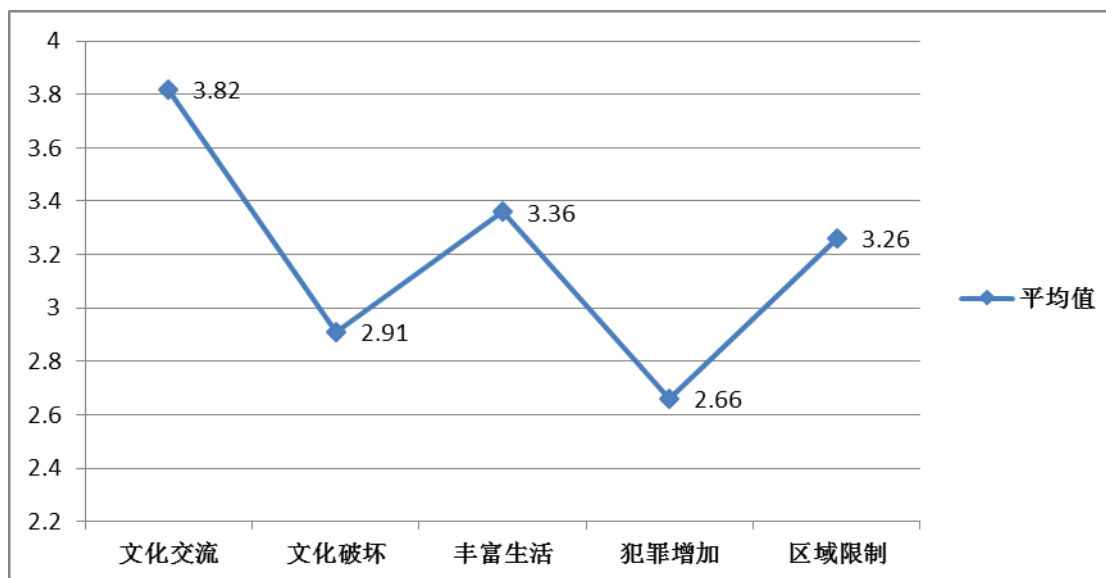


Figure 2-6 Evaluation chart for resident perception to culture impact of 2012

平均值 Average value

文化交流 Cultural exchange

文化破坏 Cultural destruction

丰富生活 Life diversity

犯罪增加 Crime increase

区域限制 Regional limitation

2.4.4 Environment impact of tourism

As for the resident perception to environment impact of tourism, it can be seen from the questionnaire analysis (figure 2-7) that the average values of resident perception to the improvement of environmental health and environmental protection exceed 3.7. This indicates that the residents are satisfied with the environmental protection; the average values of

resident perception to negative impacts, such as air pollution, noise pollution, water pollution and waste increase are low, which indicates that the residents don't think tourism brings much pollution. Generally speaking, the environment of Kanas is well-protected during tourism development.

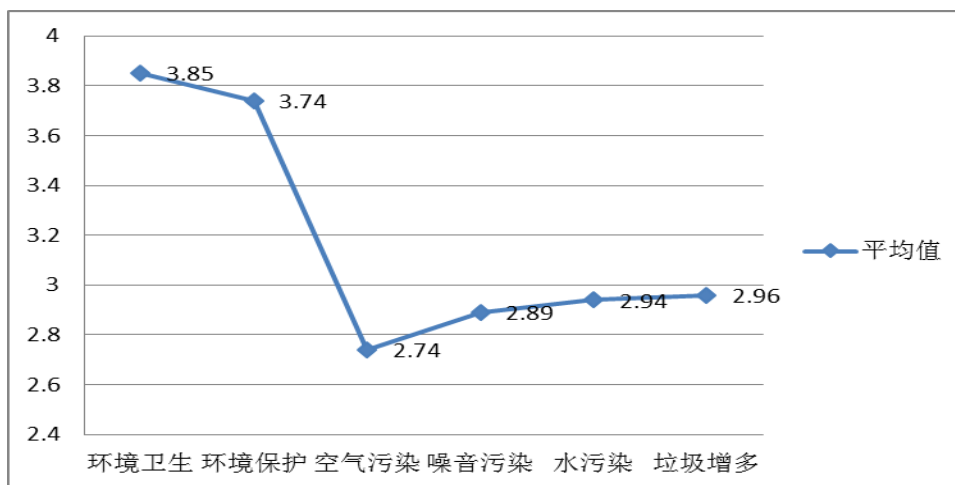


Figure 2-7 General average values of perception to environmental impact of tourism

平均值 Average value

环境卫生 Environmental health

环境保护 Environmental protection

空气污染 Air pollution

噪音污染 Noise pollution

水污染 Water pollution

垃圾增加 Waste increase

It can be found by comparison with the monitoring data of 2012 (see figure 2-8) that the average values of positive impacts of 2013 are higher than those of 2012 while the average values of negative impacts of 2013 are lower than those of 2012. This indicates that the residents generally think that the environment of 2013 is better than 2012.

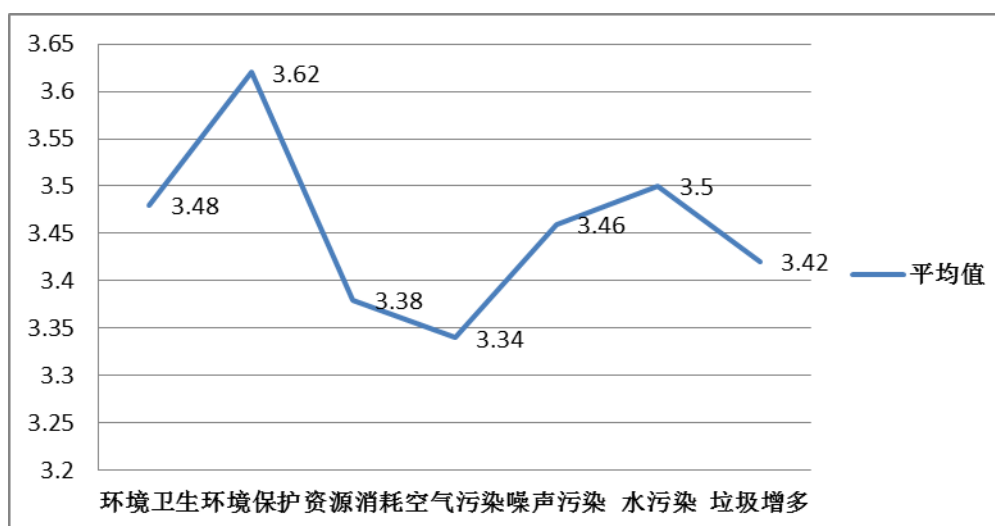


Figure 2-8 General average values of perception to environmental impact of tourism of 2012

平均值 Average value

环境卫生 Environmental health

环境保护 Environmental protection

资源消耗 Resource consumption

空气污染 Air pollution

噪声污染 Noise pollution

水污染 Water pollution

垃圾增加 Waste increase

2.5 Resident attitude

According to the questionnaire analysis (see figure 2-9), the residents hold positive attitude towards the tourism development of Kanas and are willing to throw themselves into tourism cause to offer advices for the development of scenic zone. The department of the scenic zone shall, on one hand, change its way of work to make the public feel its importance attached to the grassroots during policies implementation, and on the other hand, find a proper

way for community engagement to protect the scenic zone and benefit more residents.

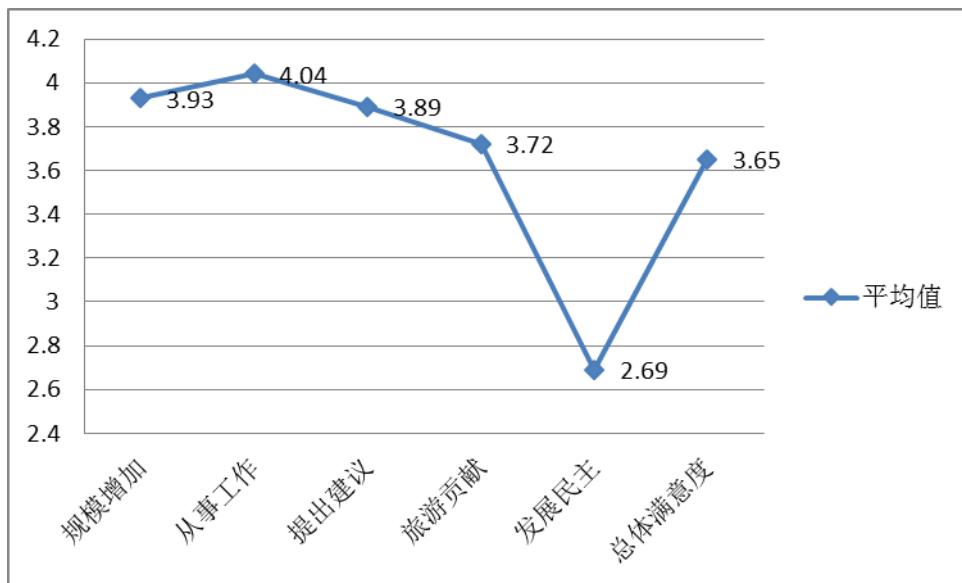


Figure 2-9 Average values of resident satisfaction

平均值 Average value

规模增加 Scale increase

从事工作 Occupation

提出建议 Suggestion

旅游贡献 Tourism contribution

发展民主 Democracy development

总体满意度 Overall satisfaction

It is found by comparison with the data of 2012 (see figure 2-10) that the resident attitude towards the tourism development of the scenic zone is basically the same as 2012. They are relatively satisfied with the tourism development of Kanas and don't think the department of the scenic zone is willing to take public advice.

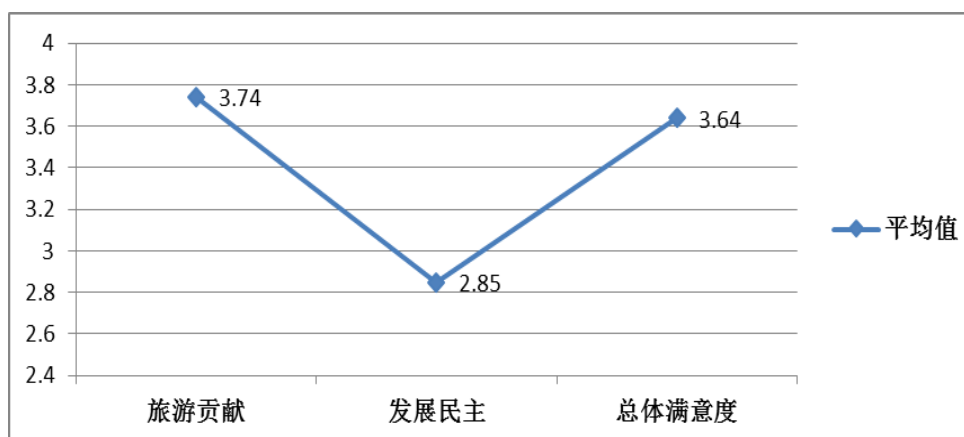


Figure 2-10 Average values of resident satisfaction of 2012

平均值 Average value

旅游贡献 Tourism contribution

发展民主 Democracy development

总体满意度 Overall satisfaction

3 Economic benefit from tourism

3.1 Monitoring on economic benefit from tourism

The monitoring on economic benefit from tourism mainly involves operators at the lower lake outlet of Kanas and in new and old Kanas villages, Baihaba village and Tielieketi township. During the monitoring, 36 operators were interviewed for 15 minutes to 1 hour. These operators are engaged in accommodation running, restaurant, souvenir selling, home visiting, shop and horse renting. Besides interview, we acquired relevant data from Kanas management committee. The monitoring is as follows.

3.2 Economic benefit from community and tourist destination

3.2.1 Tourist number and tourism receipts of the scenic zone

The statistical data from the management committee shows that Kanas received 1,068,000 tourists in 2012 (of which the area of lower lake outlet received 632,000, Hemu, 294,000, and Baihaba, 142,000), an increase of 17.8% on YOY basis (see figure 3-1). It is the first time that the number of tourists crosses the one-million mark. The ticket proceeds reached RMB 112 million, an increase of 16.1% (see figure 3-2) and the consolidated tourism receipts were RMB 1.14 billion, a drop of 2.23% on YOY basis (see figure 3-3).



Figure 3-1 Number of tourists of Kanas from 2008 to 2012

2008-2012 年喀纳斯景区游客数量 Number of tourists to Kanas from 2008 to 2012

游客数量（万人） Number of tourists (10,000)



Figure 3-2 Ticket proceeds of Kanas from 2008 to 2012

2008-2012 年喀纳斯景区门票收入 Ticket proceeds of Kanas from 2008 to 2012

门票收入（万元） Ticket proceeds (10,000 Yuan)

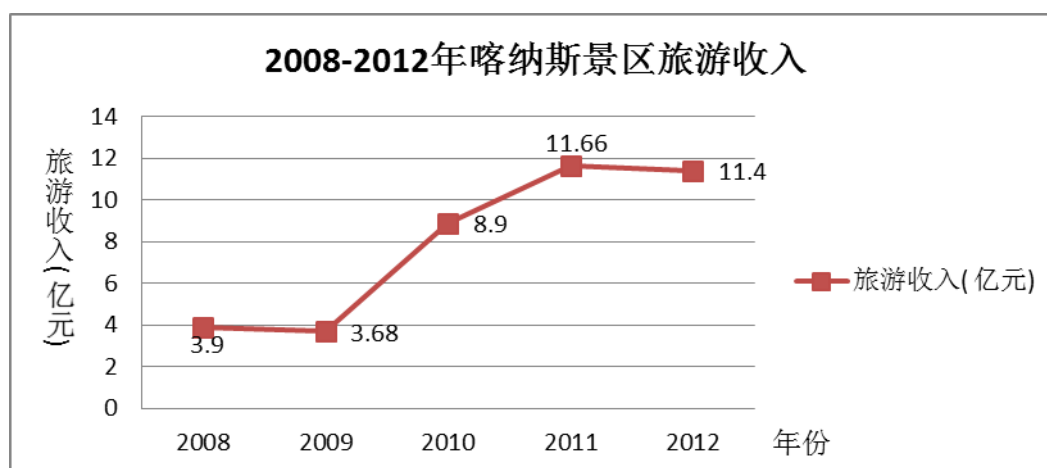


Figure 3-3 Tourism receipts of Kanas from 2008 to 2012

2008-2012 年喀纳斯景区旅游收入 Tourism receipts of Kanas from 2008 to 2012

旅游收入（亿元） Tourism receipts (100 million Yuan)

In 2013, under the slowdown in domestic economic growth, the policy constraints of business travel, the complicated situation of Xingjiang and other adverse impact, the tourist number and ticket proceeds of Kanas declined dramatically. Up to June 30, Kanas received a total of 59,000 tourists (lower lake outlet), fulfilling 8.4% of the annual plan and down 21.5% on a YOY basis; the ticket proceeds reached RMB 8.179 million, fulfilling 6% of the annual plan and down 32.7% on a YOY basis; and the fixed-asset investment reached RMB 33.96 million, fulfilling 14% of the annual plan.

3.2.2 Economic contribution of tourism to local community residents

✧ Tourism subsidy increases year by year

Before 2008, as the infrastructure of Kanas scenic zone was immature and a large number of tourists came in, many herdsmen, to earn more income, rented their houses to outsiders as hotels or restaurants. However, this not only polluted the village and destroyed the natural environment, but also resulted in competition disorder and social safety problem, which damaged the image of Kanas.

2008 is the first year of Kanas scenic zone to issue subsidy to herdsmen. In that year, in face of the increasingly severe competition disorder and pollution, Kanas management committee banned herdsmen from renting out their houses as hotels and restaurants and issued RMB 2.1 million yearly subsidize them based on the then rent for three years. In 2008, the scenic zone issued living subsidy to all herdsmen on the basis of 50 Yuan/person/month. In 2009, this living subsidy is increased to 60 Yuan. More than RMB 4 million of living subsidy were issued over those two years. In 2010, upon the approval of the *Income Increase Program for Farmers and Herdsmen of Kanas* by the local administrative office, the subsidy was increased to 70 Yuan/person/month. At the same year, Kanas management committee withdrew RMB 10.76 million from ticket proceeds, of which RMB 8.87 million were directly issued to herdsmen and the remaining RMB 1.89 million were used as a fund for the development of rural collective economy. From 2011, Kanas increased the tourism subsidy to

herdsmen: 10,000 Yuan/person/year to Kanas village, 5,000 Yuan/person/year to Hemu village, 4,000 Yuan/person/year to Baihaba village, and 1,730 Yuan/person/year to three villages (Tielieketi, Qiba'er Xilike and Akebulake) out of ticket range. In 2012, about RMB 24 million were issued, which was basically the same as 2011 during which RMB 24.52 million were issued.

✧ **The income of farmers and herdsmen per capita increased year by year**

In addition to subsidy, Kanas management committee attracts more herdsmen to participate in tourism through annual policy guidance and skill training. Now, the herdsmen within Kanas scenic zone are highly motivated with strong willingness to tourism engagement. However, the tourism engagement is still at the initial stage and the way of it includes: 1. House renting, rent excessive houses to others as hotels or restaurants; 2. Establishing a train of horses or home visiting (Kanas village); 3. Export of labor service, engaged in environmental sanitation, facility maintenance, hotel or restaurant service provision, etc.; 4. Sales of products, including dairy product, fermented milk, pine nuts, wild fruit, fungus, Chinese herbal medicine, and national handicrafts.

The net income of farmers and herdsmen per capita within the scenic zone has risen year by year since 2008. In 2012, the net income of farmers and herdsmen per capita in two townships (Tielieketi township and Hemu Kanas Mongolian township) reached RMB 8,745, an increase of RMB 1,125 compared with 2011 (see figure 3-4). As tourism has become a pillar industry of Kanas, it plays an active role in resident income.

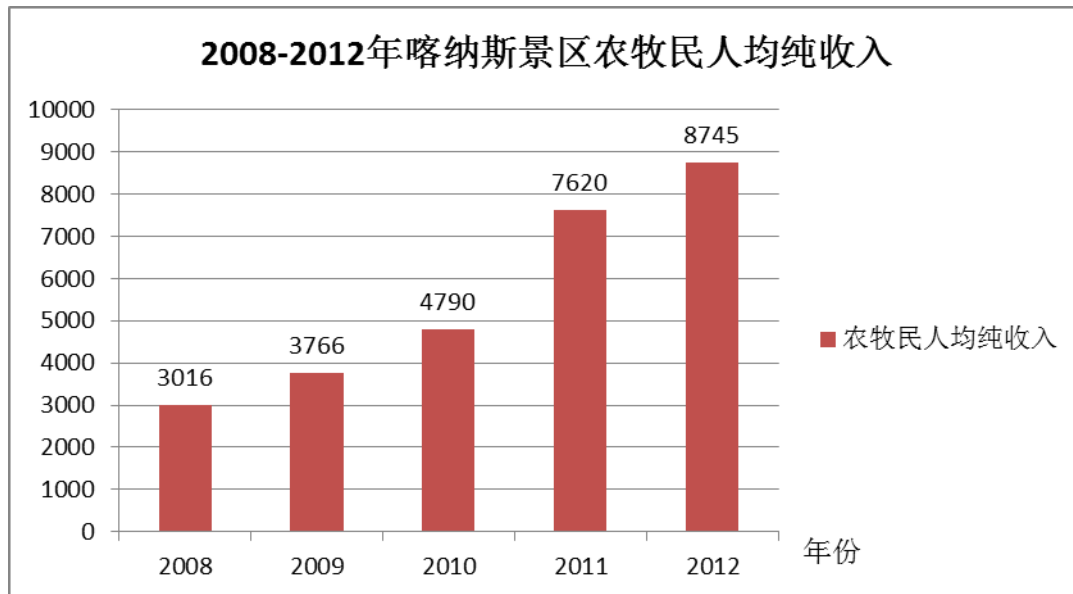


Figure 3-4 Net income of farms and herdsmen per capita of Kanas from 2008 to 2012

2008-2012 年喀纳斯景区农牧民人均纯收入 Income of farmers and herdsmen per capita of Kanas from 2008 to 2012

农牧民人均纯收入 Income of farmers and herdsmen per capita

年份 Year

3.3 Tourism seasonality

3.3.1 Seasonality of tourism demand

✧ **The tourism seasonality is strong. July, August and September are peak season.**

According to the statistical data provided in the *Monitoring Report on the Sustainable Tourism Development of Kanas 2012*, it can be judged from the trend analysis of tourist number of Kanas between May and October from 2007 to 2011 that July, August and September are Kanas's peak season while May, June and October are off-peak season. January through April as well as November and December are low season.

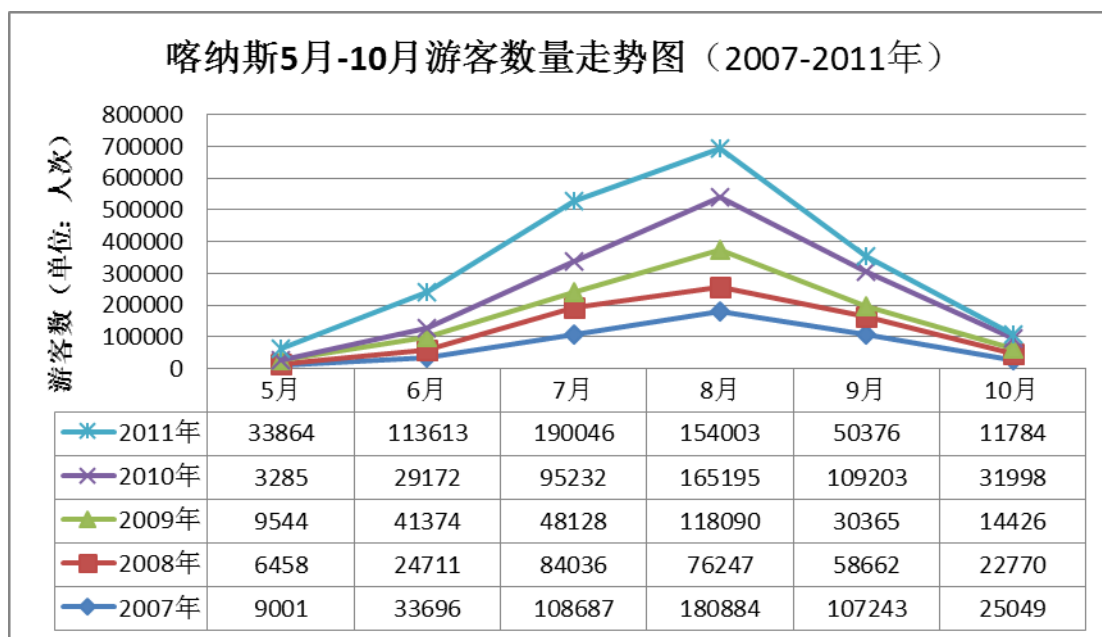


Figure 3-5 Trend chart of tourist number of Kanas between May and October from 2007 to 2011

喀纳斯 5 月-10 月游客数量走势图（2007-2011 年） Trend chart of tourist number of Kanas between May and October from 2007 to 2011

游客量（单位：人次） Number of tourists (Unit: Person-time)

5 月 May 6 月 June 7 月 July 8 月 August 9 月 September 10 月 October

Source: Monitoring Report on the Sustainable Tourism Development of Kanas 2012

Note: As the number of tourists is small in Kanas between November and December and from January through April and no statistical data was made during this low season, the tourist number during that time wasn't been taken into consideration. The lack of relevant data of 2012 and 2013 wasn't been taken into account.

Weather is the main cause to seasonality. Kanas is located in northern Xinjiang. The low latitude leads to obvious climate change and long-time winter with the temperature of -40°C . The scenic zone is hard to access. In the winter, the airport is closed and tourists can only get there by car or sled. All these conditions limit the number of tourists to some extent. As from November to April is the winter time, the tourists are very few. All we can see are only thousands of ice-snow tourists. The climate in July, August and September is good. July and

August are the summer holidays and many tourists travel there in the form of family, while September is the fall, the most beautiful time of Kanas which attracts many amateur photographers and sightseeing tourists.

3.3.2 Seasonality of tourism supply

Under the influence of seasonality of tourism demand, the tourism supply of Kanas also has its obvious seasonality. The transportation, accommodation, restaurants and other service facility in and out of the scenic zone are opened seasonally. During the peak season between May and October every year, the business hours are normal while during the low season between November and December and from January through April, only the local community residents continue their business because the members of the management committee go back to work in Burqin and the foreign operators leave the area and suspend their business.

✧ Transportation seasonality in and out of the scenic zone

Kanas airport is a seasonal airport which is opened in July and closed at the end of the National Day Golden Week every year. In other words, it runs only four months throughout the year. During its close, tourists can go from Urumqi to Chonghur through Burqin by car and then reach the scenic zone by horse slading or riding. The long travel time limits tourist's travelling to some extent.

In the summer, the interzonal vehicle is the key means of transport. Self-driving in the scenic zone is not allowed. The service hours of interzonal vehicle is May to October. From October 10 to early May, tourists can enter the zone by self-driving. Sleeping car is prohibited within the zone for safety reason and only off-road vehicle equipped with snow tires is allowed. Tourists can get to the zone by herdsman's sled.

✧ Seasonal supply of accommodation, food, tourist activity and service

Many tourists come to Kanas from May to October and the number of tourists in other months are few. Between November and December and from January through April, the bazar in Baihaba, stalls in Jiadenyu and accommodation facility, restaurants and souvenir shops in all regions are closed. Such activities like boat trip on Kanas lake and rafting are called off

due to the weather and only some home visiting, accommodation facility and restaurants run by local residents are available.

The number of tourists to Kanas is small in May each year and starts growing from then on. So, some enterprises will choose this time for decoration and open its business in June when the tourists reaches a certain amount. According to the statistics of tourism station of 2012, there are 9 units in normal business operation and 2 are under decoration at the lower lake outlet of Kanas in May; 19 hotels such as four seasons inn in Jiadengyu are in normal operation and 60% operating units are under decoration. In Hemu, only Hemu Maintain Villa is in normal operation while in Baihaba, Wuken Maintain Villa, Tuanjie Travel Agency, Dajiao Restaurant, Face-to-face Maintain Villa, and Baihaba Maintain Villa are in normal operation.

The bazar set up in 2013 is located in the southeast of Baihaba village. With an floor area of 2000 sq. m., it has 48 stalls (additional 100 stalls are available subject to development need), mainly engaged in sales of native products, national handicrafts and local food. All of stalls are managed by Baihaba village committee. The bazar is opened in August and September. It is estimated that the turnover per stall is about RMB 800/day, in other words, nearly RMB 2 million of turnover can be achieved in one year.

3.4 Operation and development of tourist enterprises

3.4.1 Change of commercial form under tourism impact

The development of tourism promotes the growth of number of local tourist enterprises whose business scope mainly focuses on six demand elements: shelter, food, means of travelling, shopping and entertainment. In Kanas scenic zone, self-driving is not allowed from May to October, during which only interzonal vehicle is available. The entertainment activities include home visiting, rafting, boat trip, etc. The number of accommodation facilities and restaurants grows year after year. See the following figure for types of shops in Kanas scenic zone. It can be found from this figure that catering and lodging are the two main

types of business operation, which account for 80% of the total shops (160). The commercial form is relatively monotonous. Souvenir shops accounts for 4% (8), department shops, 12% (26), and entertainment and others, 4% (8). As the services and products provided are basically the same, the homogenization is extremely serious.

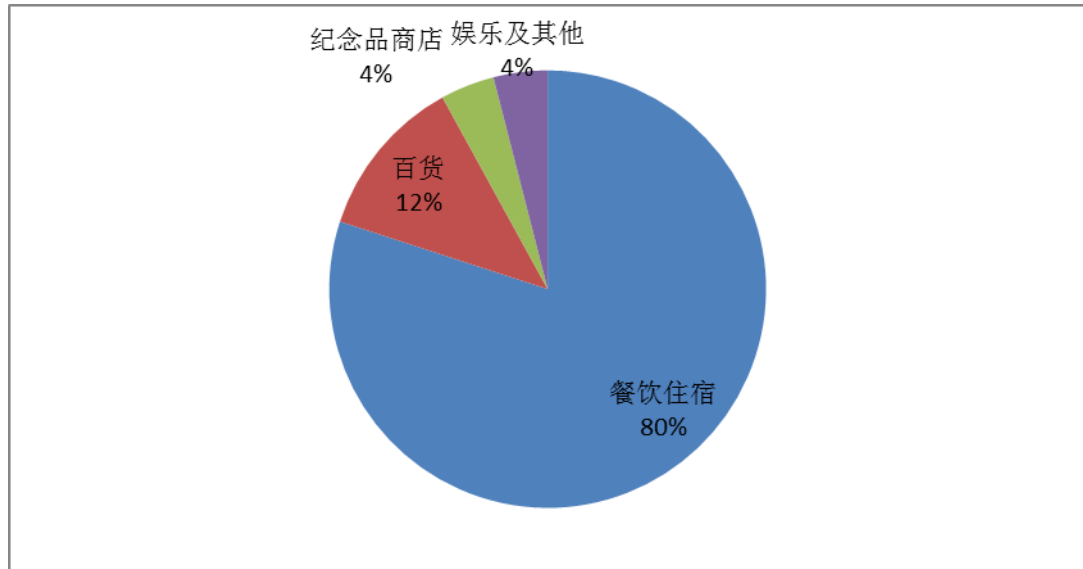


Figure 3-6 Pie chart for quantitative proportion of shops of different commercial forms in Kanas scenic zone

纪念品商店 Souvenir shop

娱乐及其他 Entertainment and others

百货 Department shop

餐饮住宿 Catering and lodging

3.4.2 Layout analysis of tourist enterprises

✧ Uneven regional distribution of tourist enterprises

Jiadengyu is the portal node of Kanas scenic zone as well as a hub which connects the important tourist nodes of Kanas scenic zone, such as Kanas, Hemu, Baihaba, Tielieketi, and Naren grassland. With 67% of beds and 39% of tables in the scenic zone in 2012, it became a place with most accommodation and dining facilities as well as a gathering place for tourists. Facility distribution corresponds to the number of tourists received. Here are the places that

receive tourists from most to least: Area at the lower lake outlet of Kanas, Hemu scenic zone and Baihaba village. Notwithstanding that Tielieketi was not taken into account during statistical analysis, there are some guesthouses and restaurants in the local area. However, as the number of tourists is small, the number and scale of these guesthouses and restaurants gradually shrink.

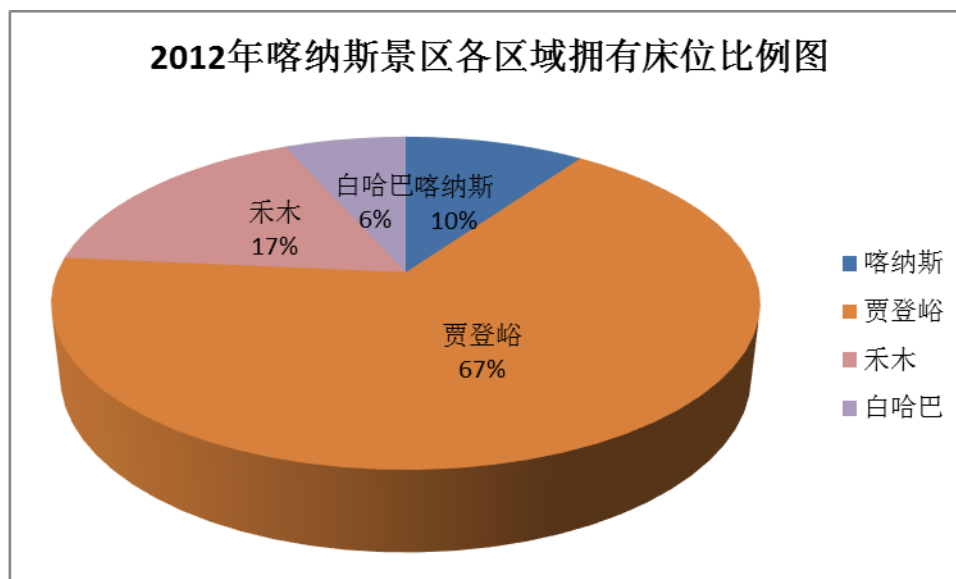


Figure 3-7 Pie chart for proportion of beds within all regions in Kanas scenic zone in 2012

2012 喀纳斯景区各区域拥有床位比例图 Pie chart for proportion of beds within all regions in Kanas scenic zone in 2012

禾木 Hemu

白哈巴 Baihaba

喀纳斯 Kanas

贾登峪 Jiadengyu

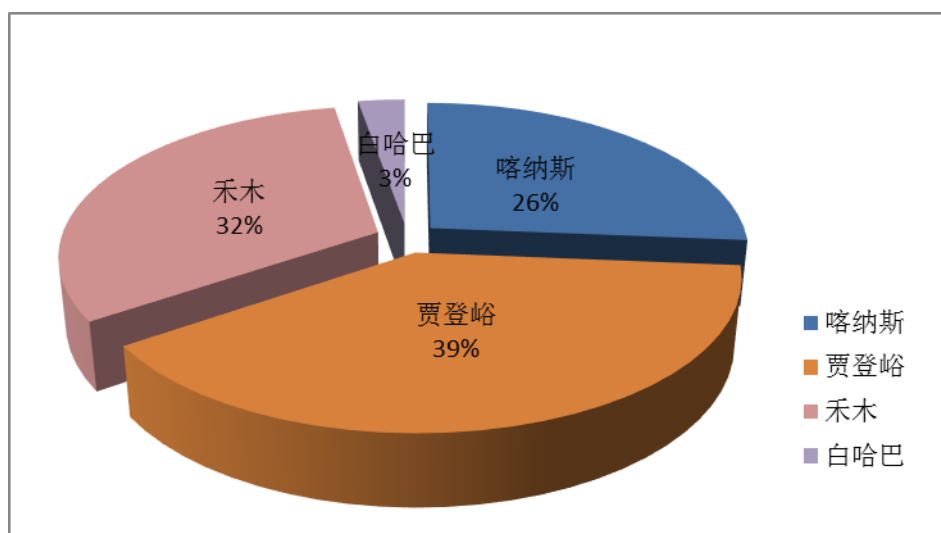


Figure 3-8 Pie chart for proportion of tables within all regions in Kanas scenic zone in 2012

禾木 Hemu

白哈巴 Baihaba

喀纳斯 Kanas

贾登峪 Jiadengyu

Under the impact of Hemu's road maintenance, tourists can only get to Hemu by horse riding or off-road vehicle. So, Hemu wasn't taken into consideration during this survey. It is known indirectly that the traffic limitation has reduced the number of tourists and resulted in close of some businesses. Some business owners even went to Kanas for business operation. So, the statistical data of tourist enterprises of Hemu scenic zone in 2013 shall be specially treated.

✧ **The regional difference of business benefit among tourist enterprises is large**

The business benefit of shops in new Kanas village and Baihaba village is better than that in Tielieketi because most of the shops in Tielieketi are for locals. As many beds in Tielieketi are vacant and the restaurants are mainly for locals and herdsmen, some businesses are at the verge of close. The density of shops in new Kanas village is high, most of which sell articles for daily use, such as clothes, shoes, food, vegetable, daily necessities, beer, etc. The "souvenir" signboard attached to wall gradually fades away without care from tourists. Compared with new Kanas village, the businesses in old Kanas village boom without more tourists and better business benefit.

4 Tourist satisfaction

4.1 Monitoring on tourist satisfaction

Tourist satisfaction is a crucial factor which decides the willingness of tourists to revisit and recommend as well as an important indicator for sustainable tourism development. The monitoring on tourist satisfaction with Kanas scenic zone was carried out by sample questionnaire survey. In the survey, objective options are used to decide tourist's basic behavioral characteristics and a series of "perception indicators" to tourism resource and environment are used to evaluate the tourist satisfaction. A total of 680 questionnaires were issued, of which 633 was effective, accounting for 93.1% of effective rate. See the following for more details about this monitoring.

4.2 Basic characteristics of tourist

4.2.1 Personal information

✧ **Region:** Many tourists to Kanas are from economically-developed cities and the trend is featured by large distribution but small concentration.

The places of residence of 429 respondents are classified on provincial basis (see figure 4-1). It can be learnt from the frequency and proportion of provinces that 12.4% of respondents are from Beijing, the proportion of which exceeds that from Xinjiang. The provinces (cities and autonomous regions) with most tourists to Kanas are, from the highest to the lowest, Guangdong, Jiangsu, and Zhejiang. Tourists from Taiwan and Hong Kong accounts for 2.6% and 1.6% respectively. Although the survey result is affected by sampling, it still provides certain reference significance. It can be found by comparison with the data of July 2012 that the situation that many tourists are from economically-developed cities still remains the same. As September is the peak season, the proportion of internal tourists within the province declines and the tourist source is rather distributed. But, Beijing, the Pearl River Delta and the Yangtze River Delta still dominate the role.

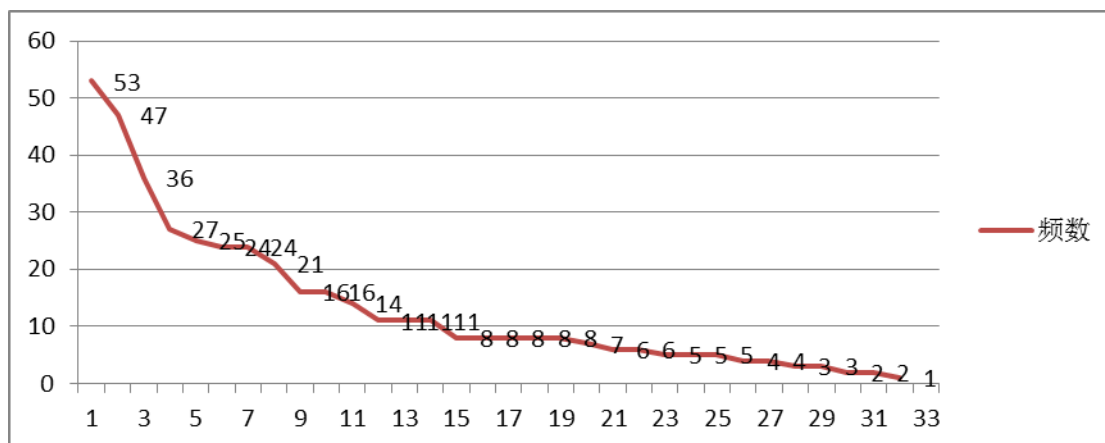


Figure 4-1 Number of tourists of all provinces

频数 Frequency

✧ **Educational level: The educational levels of tourists are relatively high**

According to the questionnaire analysis, the average value of tourist educational level is 4.6 (points 1 to 5 stand for primary, school, junior high school, senior high school or technical secondary school, junior college, university, postgraduate and above, respectively). In other words, many tourists have bachelor degree on average. Figure 4-2 shows that 49.3% of tourists are bachelors, 20.7 % are graduates of junior college, 12.1% are graduates of senior high school or technical secondary school and 15.1 % are postgraduates and above. Same as last year, given the education backgrounds of some tourists are limited by age, the educational levels of tourists to Kanas are relatively high. This is related to tourist's economic income, occupation and aesthetic demand.

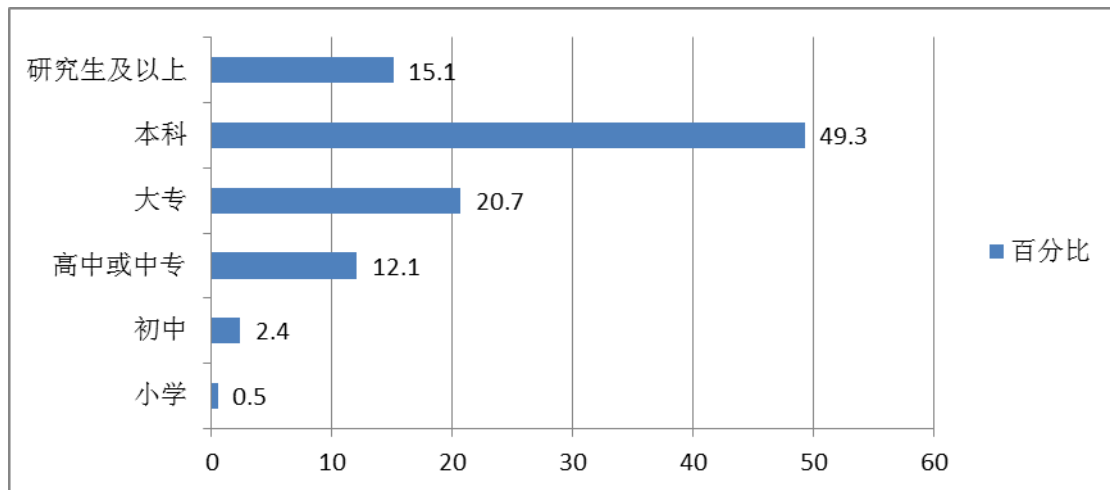


Figure 4-2 Educational levels of tourists

研究生及以上 Postgraduate and above

本科 University

大专 Junior college

高中或中专 Senior high school and technical secondary school

初中 Junior high school

小学 Primary school

百分比 Percentage

✧ Age: The age group is relatively high

According to the statistics, more than 50% of tourists are aged between 25 and 44 while the proportion of tourists aged between 45 and 64 is higher, up to 26.1%. Tourists between 25 and 44 are the group with strong market consumption ability. Tourists below 18 only take up 0.9% while tourists between 18 and 24 take up 11%. As 3.1% of tourists are aged above 65, this indicates that Kanas also attracts the retired with high income and long-distance travel habit.

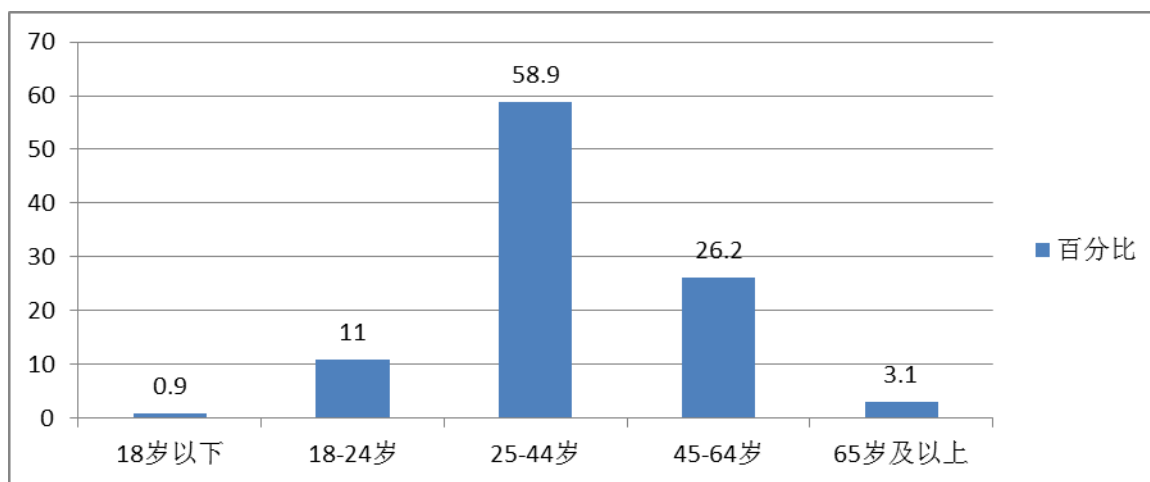


Figure 4-3 Age groups of tourists

百分比 Percentage

18 岁以下 Below 18

18-24 岁 18-24

25-44 岁 25-44

45-64 岁 45-64

65 岁及以上 65 and above

4.2.2 Travel information

✧ **Way to travel: Package tour dominates the role while the proportion of DIY tour is on the rise**

Of 633 effective questionnaires, 258 are from DIY tour, accounting for 40.8% (of which 16.6% are hikers), 147 are from package tour individually, accounting for 23.2%, 140 are from package tour with friend or family, accounting for 22.1%. In other words, 45.3% of respondents are from package tour; 53 (8.4%) respondents travelled under enterprise organization and 3.5% came for conference and investigation (see figure 4-4). Generally speaking, package tour dominates the role, but compared with 2012, the proportion of DIY tour is on the rise. Although Hemu village is not available for travel due to transportation construction, many hikers has gone or intend to go there. All these figures show the attraction of Kanas to DIY tourists and particularly hikers.

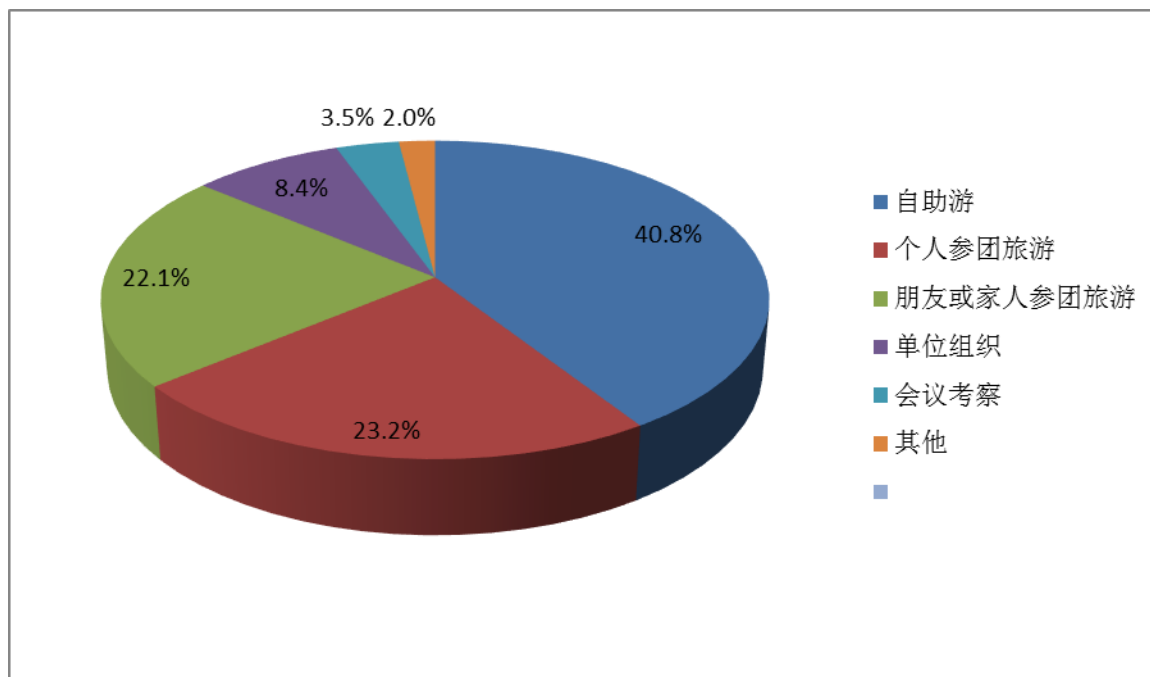


Figure 4-4 Age groups of tourists

自助游 DIY tour

个人参团旅游 Individual package tour

朋友或家人参团旅游 Package tour with friend or family

单位组织 Enterprise organization

会议考察 Conference and investigation

其他 Others

✧ **Information channel: Web TV, recommendation by relatives and friends and TV play a crucial role**

Of 633 respondents, 259 (40.9%) get the information through internet, 233 (36.8%) are influenced by relatives and friends, and 154 (24.3%) know it through TV. The proportion of tourists learns Kanas by books is higher than those by travel agency, accounting for 19.4% and 17.1% respectively. The number of tourists (46) learns it by newspapers and periodicals is

small (see figure 4-5). Generally speaking, Web TV, recommendation by relatives and friends and TV are three major channels for tourists to get information about Kanas. The high number of tourists which learns it by books shows certain characteristics of the tourist market and is related to the high cultural quality as a whole.

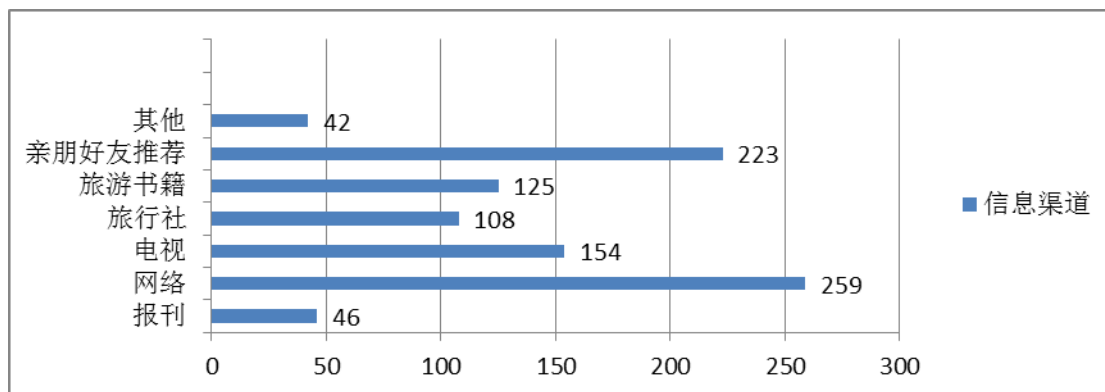


Figure 4-5 Information channels for tourists

其他 Others

亲朋好友推荐 Recommend by relatives and friends

旅游书籍 Travel book

旅行社 Travel agency

电视 TV

网络 Internet

报刊 Newspapers and periodicals

信息渠道 Information channel

4.3 Evaluation of travel experience

4.3.1 Evaluation of tourism resource

✧ **The local resource is generally recognized while the evaluation of activity development is low**

Tourist satisfaction with Kanas tourism resource is high. In the questionnaire, a total of 8 options are about tourism resource evaluation, see figure 4-6. According to the figure, except “tourism activity”, the average values of the options concerning tourist satisfaction with

tourism resource are above 4. These average values are, from the highest to the lowest, 4.68 for Kanas lake, 4.53 for forest, 4.42 for prairie, 4.39 for climate, 4.19 for residential environment, 4.17 for national customs and 4.10 for border atmosphere. It can be found by comparison with the data of 2012 that tourist satisfaction with climate and border atmosphere is greatly improved while the satisfaction with tourist activity significantly drops. This indicates that they highly recognize the local tourism resource but generally think that the tourist activity is under-developed. So, more efforts shall be made in the future tourist activity development.

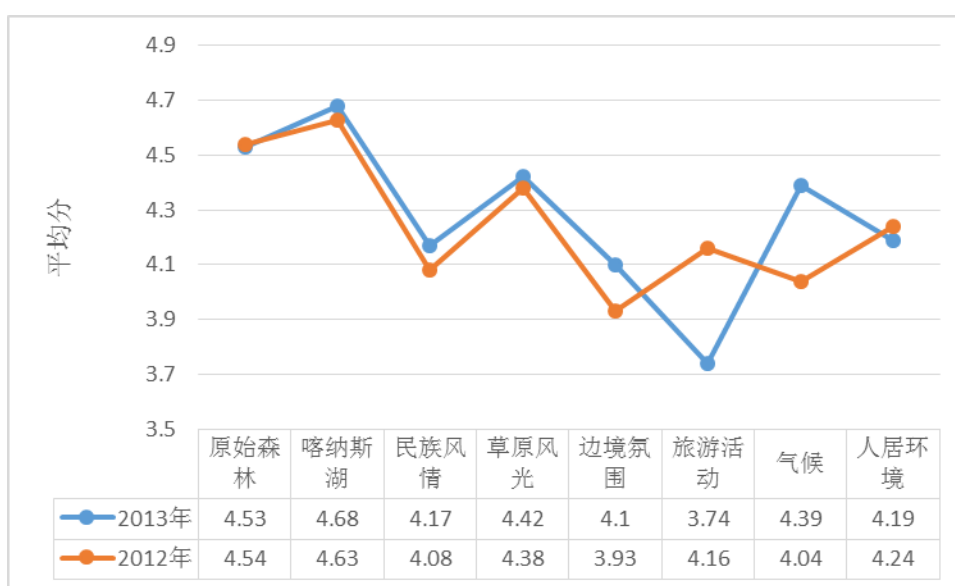


Figure 4-6 Evaluation of satisfaction with tourism resource in 2012 and 2013

平均分 Average

原始森林 Primitive forest

喀纳斯湖 Kanas lake

民族风情 National customs

草原风光 Prairie

边境氛围 Border atmosphere

旅游活动 Tourist activity

气候 Climate

人居环境 Residential environment

4.3.2 Evaluation of tourist environment

- ✧ **The evaluation of tourist environment is generally high and the evaluation of social environment is increased.**

According to the survey of 2012, the tourist evaluation of natural environment in the scenic zone is relatively high, while the evaluation of social environment, such as social security and local resident attitude is slightly low. This survey data shows that the average values of tourist evaluation of social security and resident attitude are 4.27 and 4.19 respectively, a slight increase compared 4.17 and 3.99 in 2012.

Table 4-1 Evaluation of satisfaction with tourist environment

Environment	1	2	3	4	5	Average
The social security is good	0.3	1.2	12.6	34.5	49.7	4.27
The local residents are friendly	0.3	2.2	18.0	33.8	43.5	4.19
Note: Strongly agree 5, agree 4, neutral 3, disagree 2 and strongly disagree 1						

4.3.3 Evaluation of tourism service

- ✧ **The evaluation of tourism service is low and the satisfaction is affected by accommodation and catering**

Compared with the above two, the tourist satisfaction with tourism service is relatively low. In the questionnaire, 12 options are about tourism service in the scenic zone. See figure 4-7.

According to the statistical result, the tourist evaluation of Kanas's tourism service is not high. This survey only requires tourists to evaluate their travel experience through resource, environment and service, and the average value is 3.85. Tourism resource contributes the most to travel experience while service is the part which affects tourist satisfaction. Of all tourism services, the type, quality and price of accommodation and food are the least favorite among

tourists with the dissatisfaction rate up to 30%. The average values of the type (2.86) and price (3.01) of food are the lowest. Many tourists know little about recreational activities. All these prove that defects exist in service quality management.

Compared with 2012, the satisfaction with other options are increased at all levels except for food price, tourist product characteristics and recreational activities. The obvious increase of overall satisfaction shows that the overall quality of service is largely improved in 2013, but more efforts should be made on handling the problems of catering and accommodation services.

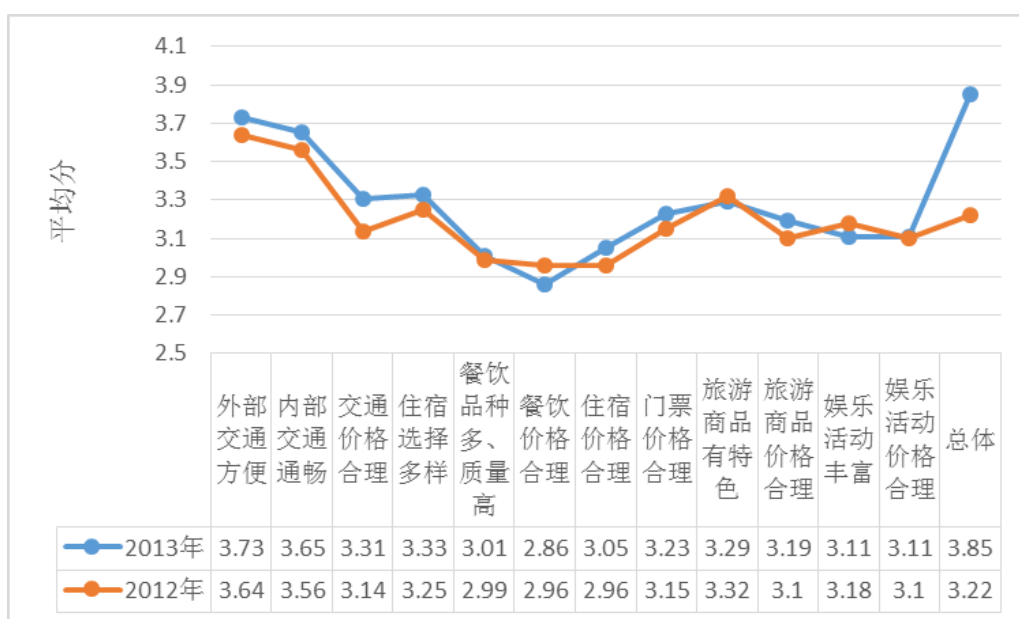


Figure 4-7 Evaluation of satisfaction with tourism service in 2012 and 2013

平均分 Average

外部交通方便 External accessibility convenience

内部交通通畅 Smooth internal traffic

住宿选择多样 Accommodation diversity

餐饮品种多、质量高 Diverse food type and high quality

餐饮价格合理 Reasonable food price

门票价格合理 Reasonable ticket price

旅游商品特色 Tourism product characteristics

娱乐活动丰富 Recreational activity diversity

娱乐活动价格合理 Reasonable recreational activity price

总体 General

4.4 Satisfaction at the time of departure

✧ The satisfaction is affected by services and the expectation is basically met.

According to the foregoing analysis, in the questionnaire, the overall satisfaction is large affected by the low satisfaction with tourism service. There are five options concerning tourist exception: better than expected (26.9%), exception met (61.6%), not good and not bad (17.3%), worse than expected (17.5%), and far from what I expected (3.5%). See figure 4-8 for results. Generally speaking, the expectations of most tourists are met.

The overall expectation is increased compared with 2012. The rates of better than expected and expectation met are higher than those of 2012 while other negative perception decrease. This indicates that the tourist expectation management of 2013 is improved.

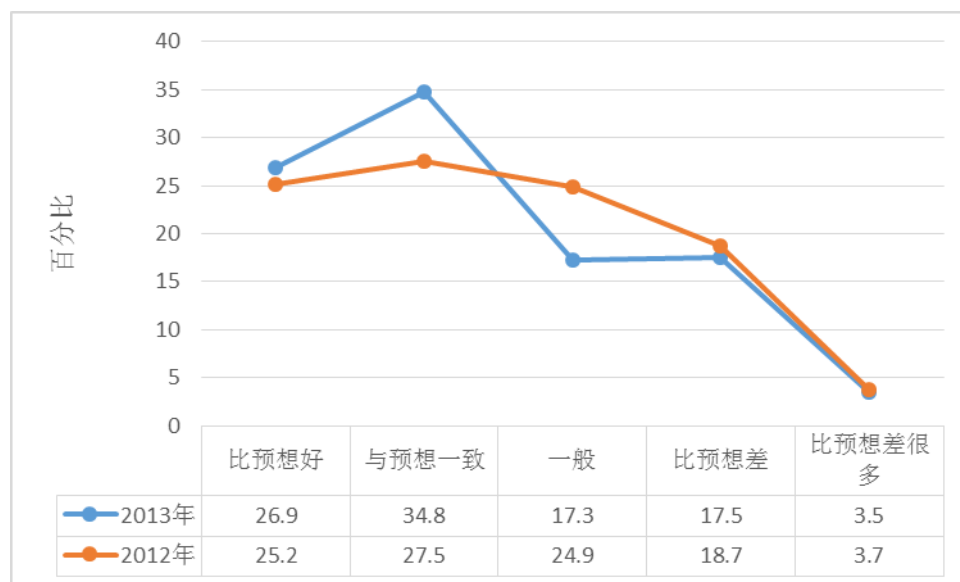


Figure 4-8 Difference between tourist experience and expectation in 2012 and 2013

百分比 Percentage

比预想好 Better than expected

与预想一致 Exception met

一般 Not good and not bad

比预想差 Worse than expected

比预想差很多 Far from what I expected

✧ **The willingness to revisit is high and the time to revisit is relatively concentrated**

In the survey, 56.2% of tourists are willing to revisit Kanas, 15.9% say no, and the remaining 27.9% are not sure (see figure 4-9). Distance, transportation and cost are the reasons why some tourists say no. Generally speaking, the tourist willingness to revisit is relatively high. As the tourism seasonality is obvious, many respondents will choose July and August to revisit. Even that some respondents has come to Kanas in September, they are willing to revisit in the same month.

Compared with 2012, the tourist willingness to revisit is largely improved in 2013, which indicates that the tourist perception to Kanas's management has been greatly improved.

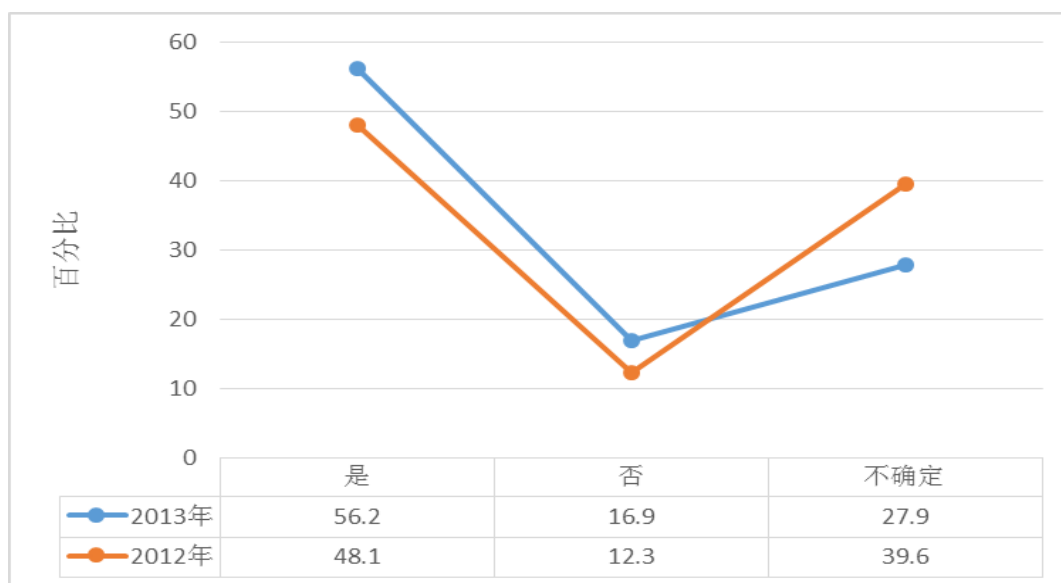


Figure 4-9 Willingness to revisit

百分比 Percentage

是 Yes

否 No

不确定 Not sure

✧ **The willingness to recommend is strong and the sustained development is expected.**

In the survey, 89.0% of tourists are willing to recommend Kanas to relatives and friends, 4.1% say “no” and the remaining 6.9% are “not sure” (see figure 4-10). The tourist willingness to recommend Kanas to relatives and friends is strong. Generally speaking, the proportion of the willingness to recommend is higher than that of the willingness to revisit (56.2%). It can be concluded from interview that many tourists think Kanas is a beautiful place. However, some tourists stay neutral due to long distance, high cost, lack of construction characteristics and improper management. They expect future development and may to recommend it to their relatives and friends after some time.

Compared with 2012, the willingness to recommend is slightly increased in 2013, which shows that more and more tourists tend to recommend Kanas. It can be thus concluded that the reputation of Kanas scenic zone will be largely improved after a year.

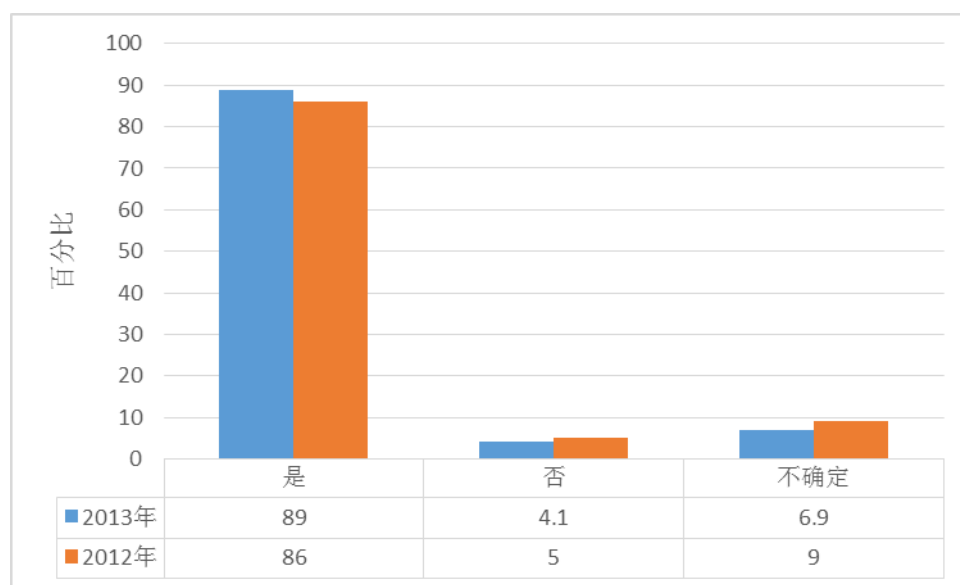


Figure 4-10 Willingness to recommend

百分比 Percentage

是 Yes

否 No

不确定 Not sure

✧ **The natural scenery is well-recognized while the humanistic experience is insufficient.**

According to the open-ended questions in the questionnaire, a cloud text picture is made (see figure 4-11) based on the frequency of words and sentences used by tourists to express their general impressions on Kanas. Many tourists use “natural scenery”, “beautiful landscape”, “scenery”, “beautiful” and other words to describe Kanas while some deem it as a “wonderland” or “heaven”. Being rated as a heaven on earth, Kanas is well-recognized among tourists thanks to its unique natural scenery.

At the same time, this also reflects Kanas’s weak humanistic resource development and monotonous tourism product design. “Moon Bay” and “Fish Viewing Platform” are the two spots that tourists mention the most. Although “The Tuvas” and “Baihaba village” are highly commended, they are not mentioned all the times. Some tourists even mention about “culture buried”. All these show that natural scenery is the core competitive resource of Kanas, but tourists expect more humanistic experience.

Many tourists mention about transportation, accommodation, price and business. This reflects that tourism service will affect tourist impression.

Figure 4-11 Tourist impression

“Transportation”, “price”, “service” and “security” are the things that mentioned the most by tourists in the questions about Kanas impression and opinions & suggestions of Kanas future development. As for service, “accommodation and food” are the key problems. This corresponds with the low satisfaction with service (see figure 4-12)

Although many tourists complain about price, they are still glad to see the local economic development and the living standard improvement. In consideration of the obvious seasonality, they can accept relatively high price. But they hope that the price can correspond with the quality and the management can be standardized and unitized.

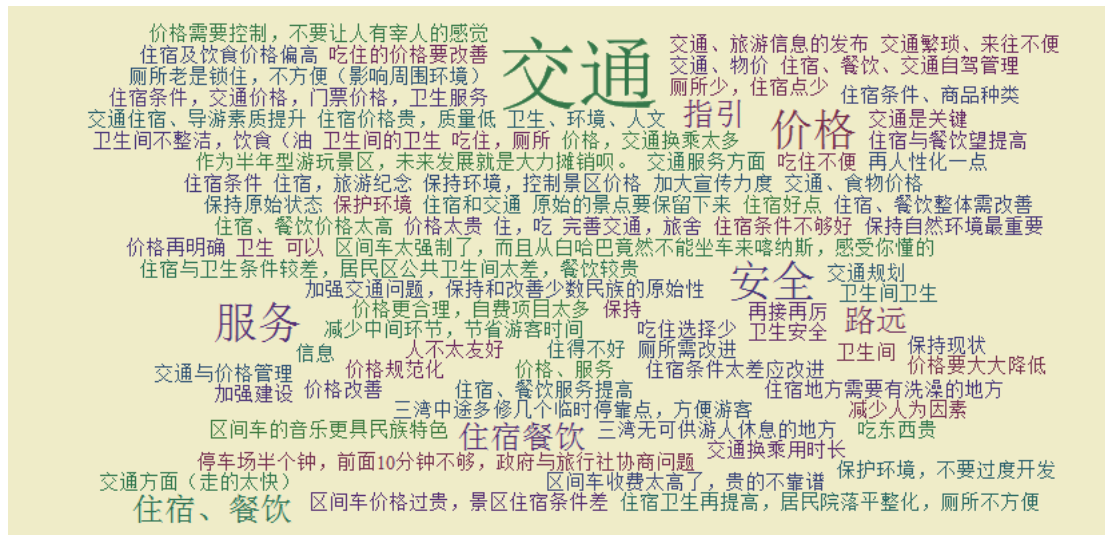


Figure 4-12 Tourist suggestions

5 Tourism product and service

5.1 Monitoring on tourism product and service

Formed by the development and design of tourism resource, tourism product and service are the core and fundamental guarantee for the existence and development of tourist destination. Thus, they are the main monitoring objects of sustainable tourism development. In this monitoring, the survey on tourism product and service of Kanas scenic zone was carried out by questionnaires, interview with the administrators and observation record. See the following for more details.

5.2 Analysis of tourism purpose

The tourism purpose is analyzed according to the questionnaires collected. See figure 5-1.

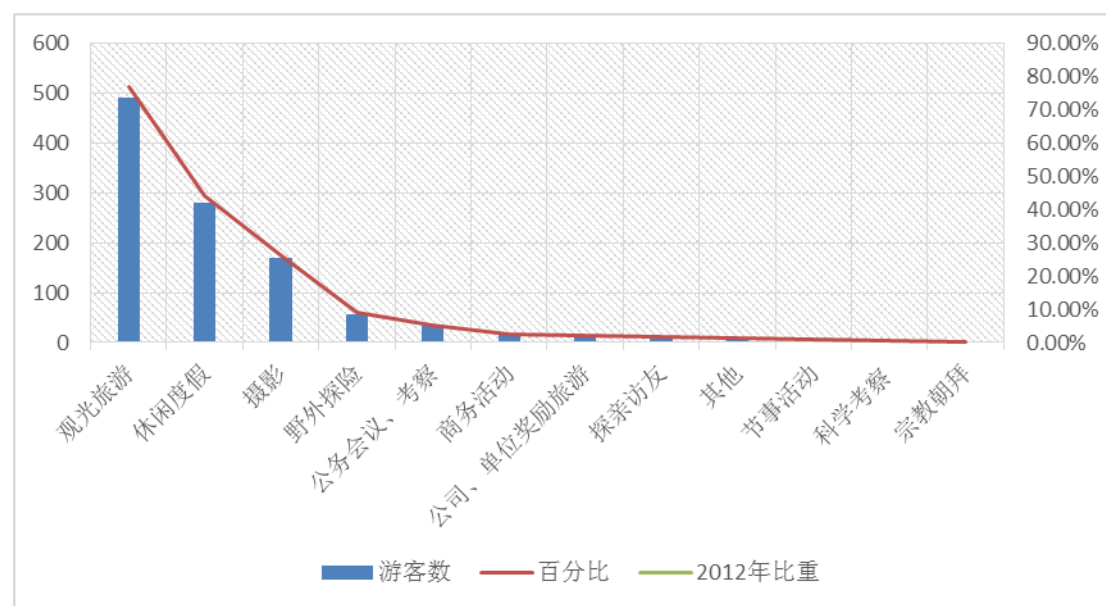


Figure 5-1 Analysis chart of tourism purpose to Kanas

观光旅游 Sightseeing

休闲度假 Vacation

摄影 Photography

野外探险 Wild adventure

公务会议、考察 Conference and investigation

商务活动 Business trip

公司、单位奖励旅游 Incentive tour

探亲访友 Visit relatives and friends

其他 Others

节事活动 Festival and events

科学考察 Scientific investigation

宗教朝拜 Religious pilgrimage

游客数 Number of tourists

百分比 Percentage

2012 年比重 2012 proportion

It can be found from the chart that the three main purposes to Kanas are sightseeing (77.12%), vacation (44.04%) and photography (26.49%). Festival and events tourism, scientific investigation and religious pilgrimage are the least favorite purposes. It is thus clear that sightseeing is main purpose of tourism. Compared with the date of 2012, the proportions of photography and wild adventure are greatly increased while the proportions of vacation and incentive tour are significantly decreased. All these show that the beautiful natural scenery of Kanas becomes increasingly popular among tourists to some extent while the internal vacation atmosphere gets worse.

5.3 Analysis of tour road

5.3.1 The tourism product is renewed with the further introduction of winter tour route

The tourism products of Kanas are further renewed in 2013: 1. Hemu scenic zone was expanded and optimized with efficiency improvement, and some distinctive tourism products such as oboe, lamasery, Tuvas home visiting, were improved; 2. More festivals and events

were held, such as mountain flower festival, rafting festival, photography festival, ice and snow festival, and international paraglider event (class II); 3. More efforts were made to promote the development of national dress, special souvenirs, handicrafts and other tourism products to further extend the local tourism industry chain.

In terms of tour route, the six core routes remain the same as last year, but this year, three routes for outdoor trekking, scientific investigation and exploration are going to be created due to close of the route to Hemu as a result of road maintenance. These three routes includes from Jiadengyu to Hemu (Jiadengyu to Kanas, golden level), from Kanas to Twin Lake (platinum level) and from Kanas to White Lake (diamond level).

5.3.2 The number of tourists to the core scenic spots

According to the number of tourists to Kanas over the years, five core scenic spots (Kanas lake, Jiadengyu, Hemu village, Baihaba and Naren grassland) are selected according to the above tourism product system and tour routes, and the result is concluded as follows upon interview with the tourists to other scenic spots in Kanas. See figure 5-2:

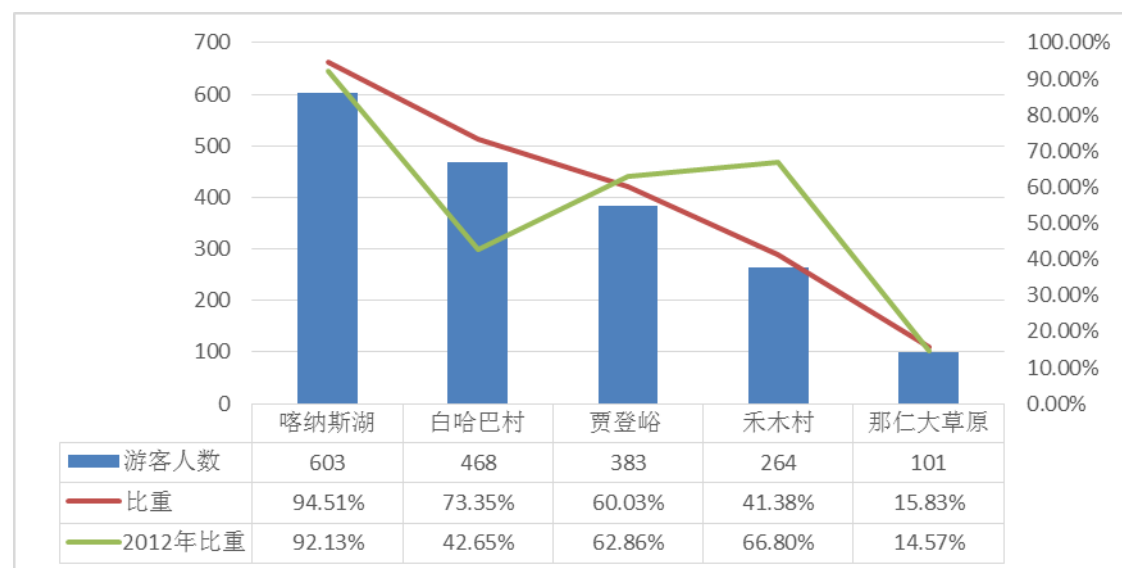


Figure 5-2 Number of tourists to the core scenic spots of Kanas

喀纳斯湖 Kanas lake

白哈巴村 Baihaba village

贾登峪 Jiadengyu

禾木村 Hemu village

那仁大草原 Naren grassland

游客人数 Number of tourists

比重 Proportion

2012 年比重 2012 proportion

It can be seen from the figure that Kanas lake is a must-go spot. Nearly all tourists (94.51%) have been there. The number of tourists to Hemu village drops by 25% compared with 2012 as the buses to there are not available to the public due to road maintenance. But its unique rustic charm still attracts nearly 40% of tourists to go there by horse or rental car; the number of tourists to Baihaba village is greatly increased by 30%. As the east gate and reception point, Jiadengyu has 60% of tourists to visit, which is the same as last year. The number of tourists to Naren grassland, an important spot of the west gate route, takes up 15.83%, which is the same as last year.

5.4 Tourism service quality

5.4.1 Type of tourism service

As for the types of tourism services, the services available in the scenic zone include: Catering, accommodation (star-rated hotels, guesthouses, youth hostel and yurt), sales of native products (milk granule, fermented milk, acidophilus milk, etc.), handicrafts (Gobi jade, Ehe rare stone, etc.) and clothes & leather (national dress and leather product), entertainment (home visiting, bar, etc.), transportation (interzonal vehicle and horse), postal service and other tourism-related service. The types of tourism services remain the same as last year, but tourism infrastructure is greatly improved. As the government requires stricter control on tourism service quality, the service standardization has been improved.

5.4.2 Improvement of tourism service facilities

In general, the tourism service facilities of Kanas were established and given based on the main scenic spots. The layout is basically the same as last years and mainly centers on

such areas like Kanas lake, Jiadengyu, Hemu and Baihaba. See table 5-1 for the number of main tourism service facilities. It can be seen by comparison that the facilities were greatly improved over the past year.

Table 5-2 Statistical table for number of tourism service facilities of Kanas

Area	Number of beds	Number of tables	Interzonal vehicle				Boat			Rafting		Touring car	
			Number of vehicles	Number of seats	Type of vehicles/quantity	Route	Number of boats	Number of seats	Organization	Number of rafts	Number of seats	Number of cars	Number of seats
Kanas	870	3320	40	1300	10 Yutong Auto (Company)	Transfer – By Kanas lake	1	20	Operator	30	240		
							18	500	Great West				
					30 Coaster (Company)	Transfer – Fish Viewing Platform	2	64	Nanhu				
							2	24	Forestry Bureau				
							1	30	Fire Department				
Jiadengyu	5921	4952	95	3674		Jiadengyu – Heiliutan Airport							

Tourism product and service

					95 Yutong Auto (Company)	Ticket office - Transfer						10	40
Hemu	1500	4000	38	1362	38 Yutong Auto (Company)	Hemu ticket office – Fellow- townsmen							
						Jiadengyu - Hemu ticket office							
Baihaba	589	350	36	1290	8 Coaster (Company)	Transfer - Baihaba							
					28 Isuzu (Department of Transportation)								
Total	8880	12622	209	7626			24	633		30	240	10	40

5.4.3 Improvement of tourism service quality

Various measures have been taken to improve the tourism service quality of Kanas scenic zone. These measures include organizing tourism administrators for training, signing a quality responsibility certification with the major tourism service agencies, training tourism-related employees, regulating tourism market order, improving tourism service, and providing field service at the station. According to the tourist satisfaction with the overall tourism service quality, the quality has been greatly improved in 2013.

✧ **Train tourism administrator**

Under the advocacy of Kanas management committee, the tourism service quality of Kanas was significantly improved over the past year. During the year, the committee established a tourism management station with an objective of “strengthening internal quality and building external image”, and actively developed high-caliber leading cadres. It organized all staff to learn the guidelines of the 8th National Party Congress conference of the autonomous region, revised the Tourism Management Regulations of the Xinjiang Uygur Autonomous Region as well as laws and regulation concerning tourism law enforcement and tour guide management, strengthened the cadres’ political accomplishment and overall awareness and improved their tourism management and service abilities.

In May, a half-month paramilitary management was carried out and specific tourism station services were provided to improve massed learning. In addition, the Tourist Administration set up a moral culture construction team, established the “responsibility system of top leaders”, and identified concrete job duties. It formulated the *2012 Work Plan for Moral Culture Construction of the Tourist Administration in Scenic Zone*, further improved the related system of the administration, created government affairs column and clean and honest Party construction column, made public its functions, handling procedure, work system and service commitment and initiatively informed the society of its affairs so as

to maintain its good image, arouse attentions from leaders, establish institutional framework, implement system and ensure the accomplishment of moral culture construction in terms of organization, institution and staff.

✧ **Sign a quality responsibility certification with the major tourism service agencies**

This year, the tourism management station convened a conference for tourism industry of scenic zone, increased, enhanced business service awareness, and promoted the development of management standardization by means of fine tourism management; Tourism-related enterprises (operators) in the scenic zone must be approved and go through the operation procedure. More than 120 enterprises (operators), small and large have been approved. Tourism service quality responsibility certification was signed with and service quality deposit was paid;

✧ **Train tourism employee**

During the year, Kanas management committee invited the teachers from Altay occupational and technical training center to give training to tourism employees in Kanas and Jiadengyu. 500 persons took part in training and it is estimated that a total of 2000 were trained throughout the year. By holding the first tourism service skill contest with Altay occupational and technical training center and Burqin labor and HR bureau, the committee improved the service skill of administrators to some extent. It also held two-term hotel middle and senior management training and tourism skill and market standardization management training for 1500 persons. The quality of tourism employees has been greatly improved through these trainings.

✧ **Regulate tourist market order**

Kanas management committee intensified its efforts in tourist market regulation in 2013.

1. It put more efforts in tour guide market supervision; 26000 tour guides were examined, 312 violations and 295 false certificates (including tour guide certificate, disabled soldier

certificate, disabled person certificate, tour bus driver certificate, etc.) were found, and more than RMB 10,000 of economic loss were recovered; 2. The Rules and Regulations on Kanas Fine Management were implemented. Upon fine management and supervision by tourism station, 65 market violations were investigated and treated and 134 service quality scores were deducted. The illegal behaviors were timely rectified. Five *Supervision Notifications* were issued in a written form in the scenic zone and obvious improvement was seen in tourist market violations; 3. All station sites were on duty throughout the day during the peak season and all stalls, environmental health, and tourism facilities were checked daily. More than 500 sunshades which had been set up against regulations were removed. A weekly inspection themed by “honesty and development” was conducted since September with 82 false certificates and 5 price violations investigated and treated. 5 major inspections were conducted against tourism enterprises by tourism management station, industry and commerce administration, department of health, tax department, development and reform commission and other departments to standardize enterprise (operator) business behavior and crack down on false tourism ads and products. By working with the development and reform commission and the law-enforcing department, it helped the price group to select 10 price integrity enterprises (operators) in terms of accommodation, catering and tourism product. All these efforts show that strict management measures and clear management standards are helpful to contain the cutthroat competition of Kanas tourism market and stabilize the overall market order.

✧ **Improve special tourism service**

The management committee improved the horse and home visit services. It investigated and adjusted the horse tour routes, separated horse way from footway and driveway, and strictly investigated such illegal behaviors as stopping service in midway and fraud. To minimize accidents, it set up signboards to indicate the information about horse renting, price, route, safety and tourist complaint. A horse ticket insurance system was introduced to reduce

safety disputes. Five safety complaints were received throughout the year with firstaid and compensation timely provided. As to home visiting, the management committee issued the *Home Visiting Management Standards* in Chinese and Kazakh to home visit operators and inspected the standard implementation result door by door. 10 operators were inspected in this regard. It signed *Home Visit Accountability Letter* with home visit operators, pay a door-to-door visit and supervised the implementation result regularly, and provide relevant service to keep improving the cultural taste and service quality of home visit as a humanistic experience of the scenic zone.

✧ **Tourism station provides field service**

According to the data provided by Kanas Tourist Administration, in 2012, a rapid tourism service system was established to make the service more humanized and effective. The 13 tourism stations built can provide timely and convenient field service in the scenic zone. According to the statistics, the stations answered more than 10000 questions, solves 200 tourist problems, got back 60 lost articles to owners and found 20 lost tourists; the complaint hotline is on duty for 24 hours and the office handles consultations and complaints seriously, resolve problems quickly and is dedicated to tourism service. It is estimated that 69 complaints were received (all of which were settled), 21 inquiry hotlines were answered, and 186 problems in related to travelling, catering, sightseeing and lost & found were resolved. The tourist satisfaction reaches 100%. According to the historical data (see table 5-2), the frequency of complaints is on the increase year after year.

Table 5-2 Statistical table of case received from 2009 to 2012

Time	Total number of cases received	Settlement	Growth rate
2009	17	All	
2010	18	All	5.88%
2011	33	All	83.33%
2012	69	All	109.09%

5.5 Destination image protection

5.5.1 Destination image

Kanas continues to develop new tourism product, improve tourism service quality, and shape a good tourism image. It won four honors in 2013: the forth Monitoring Center for UNWTO Sustainable Tourism Observatories in China, the “national natural conservation area advanced group” for Kanas management committee by seven ministries and commissions, such as State Forestry Bureau, “the most internationally influential ethnic festival” for Kanas Autumn International Photography Festival by China Union of Anthropological and Ethnological Sciences and IFEA, and the “national eco-culture village” for Hemu by Chinese Ecological Culture Association. Kanas is now working to create three brands: safety scenic zone, national eco-tour demonstration area, and world geopark. Necessary adjustment was made to the area and scope to be submitted for application based on the actual problem existed in the previous application (subject to Kanas geopark area approved by the Ministry of Land and Resources, total area 875 sq. km.). Now the application materials are being revised and perfected.

5.5.2 Kanas tourism image marketing and promotion

The tourism image of Kanas was marketed and promoted by means of festivals & special

events promotion, travel fair, media publicity and film and TV. According to the number of tourists and reputation, the result is good.

✧ **Festivals & special events promotion**

The overall image was marketed and promoted through festivals & special events. Here are some festivals and events: the 5th Kanas Ice and Snow Tourism Festival and Hemu Cup Ancient Skiing and Hunting Contest, Xingjiang Snow Race and the 4th Kanas Popular Cross-country Skiing Invitational Tournament, Xinjiang Kanas Poetry Festival, 2011 - 2012 China Southern Airlines Media photography and writing event for Kanas Mountain Flower Season, Guangdong Mainstream Media and Travel Agency photography and writing event, the 1st Kanas Rafting Festival, 2012 National Paragliding Tournament, and the 12th Kanas Autumn International Photography Festival. In addition, Kanas successfully held the international seminar for “Tourism Planning and Destination Sustainable Development” and all coordination conferences for UNWTO’s monitoring center establishment in Kanas.

✧ **Travel fair**

Kanas promotes its image by a series of travel fair activities. It organized and participated in 2012 conference for “Creation of Harmonious and Honest Scenic Zone” covering Heaven lake of Tian Shan, Kanas, Grape Valley, Nalat and Sayram Lake, 2012 Qingdao Domestic Travel Fair, 2012 Altay Long-distance Gallery Promotion Conference, the 2th Asia-Europe Expo and Chinese Tourism Industry Expo, distributed over 20,000 propaganda materials, and carried out a strategic marketing cooperation named “Close to nature, experience Kanas” with Uni-President Group.

✧ **Media publicity**

Kanas packages and markets itself by TV, newspaper, magazine and internet. It played TV news 110 times through the general channel, news channel, Chinese international channel and sports channel of CCTV as well as provincial, municipal and autonomous regional

satellite channels. The length of time of CCTV special coverage reached 1420 minutes and of news reached 93.51 minutes. 1400 photos and articles were published online and in domestic newspaper and magazines. In addition, it played an image ad for 20 hours through the LED screen hung on the wall of *Xinjiang Daily* building at the prime location of Urumqi; posted an ad to the post four times at Kaziwan of Urumqi; and issued text and pictures in the coverage of the 2th Asia-Europe International Expo of *Xinjiang Pictorial* (6 editions). Urumqi Evening Newspaper, Morning Paper, Xinhua Net, and China News Service also covered Kanas participation in the 2th Asia-Europe International Expo.

✧ **Film and TV**

Kanas promotes itself by film and TV. In 2013, the TV scenic film named *Mountains and Water of Kanas* was made and published. At the same year, the production of 6-episode humanity documentary named *Kanas, A Pure Land* was done and would be broadcasted through CCTV documentary channel from October 1 to 6. Two micro films named *The Most Beautiful Kanas* and *Wait in Peace* were shot by Xinjiang volunteers for 10-year western plan. The film *Runaway Women* shot by Tianshan Film Studio was produced under the help of Kanas and the special documentary *Lake Monster* was made and officially published. The documentary *Kanas* is in the process of production. During the National Day holiday, the program *Rivers and Mountains in China* will broadcast five scenes of Kanas through CCTV news channel and CCTV will broadcast 9 news about Kanas.

6 Tourism planning and control

6.1 Monitoring on tourism planning and control

Generally speaking, a detailed tourist destination planning may avoid many negative impacts brought by tourism development, thus, tourism planning and sustainable tourism development are closely linked with each other. The monitoring on tourism planning plays an helping role in planning. The main monitoring means for Kanas's tourism planning and control include questionnaire survey, government interview and secondary data collection from government. See the following for integration of tourism industry and regional planning.

6.1.1 Current tourism planning or strategy

From the overall tourism planning point of view, Kanas scenic zone experienced 8 overall planning. The current planning is the *Overall Planning of Great Kanas Scenic Zone (2005-2020)* prepared by Sun Yat-Sen University in 2006. In 2012, Kanas management committee authorized Sun Yat-Sen University to made a *Revised Planning for Improvement of Great Kanas*, and prepared the *Overall Planning of the Concept of Naren Grassland*, *Overall Planning of Smart Kanas*, and *Overall Planning of Jiadengyu Tourist Area*. The first three have been approved by the expert group while the *Overall Planning of Jiadengyu Tourist Area* has been approved and implemented by the People's Government of Autonomous Region. Four special planning concerning water supply, drainage, road and environmental sanitation of Jiadengyu. The planning of Hemu and Tielieketi have been submitted to the higher authority for approval. The application for geopark is on the way. Guanghai Energy has be urged to complete the Planning of Natural Gas Pipeline of Jiadengyu and efforts have been made to submit the Regulations on Kanas Scenic Zone Management for the National People's Congress of Autonomous Region for approval. From the above, we can see that the tourism planning of Kanas has been further renewed and improved.

6.1.2 Public participation in tourism planning

According to the preparation process of the *Revised Planning for Improvement of Great Kanas* currently implemented, the planning group of Sun Yat-Sen University made a survey on the interest-related parties, including government department, tourist enterprise and community resident within the region, and carried out a detailed investigation on some typical cases. It understands the demand and goal of planning by means of questionnaire, interview and symposium. Community residents are deemed as the key respondents. The planning fully reflects the vision of Kanas residents.

6.1.3 Planning goal attainment

In the *Revised Planning for Improvement of Great Kanas*, the future tourism development of Kanas is divided into three stages: Short term (2012-2015), middle term (2016-2020) and long term (2021-2030) and the goals at different stages of Kanas tourism development and the main planning evaluation goal are described. According to the current implementation, such indicators as number of tourists and tourism receipts in the short-term goal of tourism planning have been accomplished. There are three years before the end of short-term goal, so, we still have some room for improvement. It is expected that the short-term goal will be achieved successfully.

6.2 Tourism development control

Currently, Kanas implements various management measures to control its tourism development under the guidance of planning. The major control means include land management, capital management and planning implementation.

6.2.1 Land management

✧ Project land control

The scenic zone government controls the project land by preliminary inspection and

approval of key project land. Over the past year, it carried out preliminary inspection and approval for 28 project lands with a total area of 6 hectares, including Kanas Tielieketi social welfare center land, Kanas Hemu rural community construction land and Kanas Hemu social welfare center land, and ensured the successful implementation of major projects and key infrastructure projects.

✧ **Land cadastral management**

The government also controls land by cadastral survey. Over the past year, the Land and Resources Bureau carried out the cadastral survey on Hemu Kanas Mongolian township herdsman homesteads. On the basis of the establishment of leading organization and the development of work plan, the cadastral survey on herdsman homesteads was began on April 24, 2012. On April 30, 2012, the survey and measurements on 472 homesteads of Hemu Kanas Mongolian township were completed. Upon the completion of cadastral survey, the Hemu Kanas Mongolian township herdsman were guided to apply for homestead registration. Up to October 18, 218 registration applications of preliminary approved homesteads were received, of which 124 were approved with registration certificates upon approval of the Land and Resources Bureau of Burqin. To increase the arable area within the scenic zone, the bureau actively prepared for the application of Tielieketi land project and authorized Xinjiang University to complete the project's feasibility study report.

6.2.2 Capital management

Now, Kanas tourism development has stepped into the new period and stage of transformation as well as quality and efficiency improvement. Particularly, the approval of *Revised Planning for Improvement of Great Kanas* and the implementation of the *Integration and Improvement Planning of Jiadengyu* mark the coming of a new round of development and construction. In face of Kanas tourism development, transformation and upgrading, particularly, the huge capital pressure brought by the regional infrastructure construction of Jiadengyu, debt risk exists. According to the survey, in 2012, the total fixed asset investment

in the scenic zone was RMB 202 million, of which RMB 38 million were given by the higher authority and RMB 55.82 million were from business investment. There are nearly RMB 450 million left before reaching the targeted investment amount. The scenic zone is now on the way to improve the investment company-based financing platform and explore new financing modes like issuing bonds and asset securities to relieve the capital shortage of infrastructure construction.

6.2.3 Implementation

In 2012, the management committee improved the planning by use of the *Revised Planning for Improvement of Great Kanas*, and implemented the revision. However, it is found from the survey that certain problems exist in the implementation.

✧ Legal basis for Kanas scenic zone management

First, as an integrated resource system, Kanas covers two counties (Burqin county and Habahe county), two townships (Hemu Kanas Mongolian township and Tielieketi township), Kanas national natural conservation area, Altai state-owned forest management bureau and other administrative jurisdictions. It is a need to face influences and constraints brought by contradictions to create “Great Kanas and Tourism Brand”.

Second, the administrative functions of the management committee as a “quasi-government” is only a kind of administrative recognition of a local administrative office without support by laws and regulations. The lack of legal basis for management has kept the plan to determine function, organization and authorized strength of the management committee and its subordinate departments from being approved and made the planning harder to be implemented and illegal behaviors and violations harder to be found, which brings certain negative impacts on all works. For example, it is found from the interview that the environmental protection, construction and transportation bureau in the scenic zone only has 6 permanent employees, but they have to shoulder various functions such as

environmental protection, construction and transportation. The heavy workloads make them impossible to focus on all tasks and ensure effective management. The Land and Resources Bureau of the scenic zone is the agency to Local Land and Resources Bureau. The limited size of employees and the lack of law enforcement function make the illegal land cases hard to be timely investigated, which contributes to the extension of some problems, such as staking out a claim or occupying a land randomly, and building houses blindly. Such departments as tourist administration and law-enforcing department fail to carry out related work due to lack of the authority and qualification of law enforcement. It is thus seen that Kanas management system is flawed.

✧ **Outsider's engagement in tourism**

In 2012, *Tourism Operation and Reception (Catering and Lodging) Plan for Kanas Village* and *Tourism Operation and Reception (Catering and Lodging) Standards for Kanas Village* were introduced for some herdsmen of Kanas village who want to be engaged in tourism, and were approved for implementation by the prefectural Party committee and the administrative office. According to the plan, herdsmen may voluntarily choose independent management or subsidy policy. Operator must have both household registration booklet and house in the local area and is not allowed to subcontract and rent his/her house to others, build more houses without permission or set up yurt and plank house for operation and living. However, according to the current situation, some herdsmen illegally rent their houses to outsiders and establish operation and reception facilities without permission. Driven by interests, some outsiders try every method to rent a house from herdsman in the scenic zone for illegal operation. It is learnt from the management committee that 19 houses are rented out in Kanas village, accounting for 6% of the total number.

✧ **Herdsmen's illegal house establishment**

During the land utilization change investigation and remote sensing monitoring in 2012, the Local Land and Resources Bureau found that 4 remote sensing monitoring maps and 3

parcels in new Kanas village, with an area of 8.7 mu, were not approved before commercement. Take herdsmen Wosipan and Ulan as examples. Having a homestead in hands in old Kanas village, Wosipan illegally occupied a homestead in new Kanas village with the total area of 1224.7 sq. m., and transferred it against law. In April 2013, the Land and Resources Bureau of Burqin investigated Wosipan's illegal occupation, but Wosipan applied for hearing postponement by all reasons during the period from case investgation to hearing process. Now, no result has been reached. The trend of illegal building begins to rise and will further spread. The wait-and-see attitude taken by many herdsmen may result in chain reaction, which will bring a serious impact on the planning implementation in the scenic zone.

7 Health and safety

7.1 Monitoring on health and safety

Health and safety are of tourist's major concern and will directly influence the tourism decision making. According to the *Sustainable Destination Development Indicators*, the health and safety in the tourism industry, which include food health and safety, environmental safety, community safety and tourist safety, are considered from four subject dimensions: management department, tourist, tourist enterprise and local community. The monitoring on health and safety was done by tourist and community questionnaires, resident and government interview, and secondary data collection. See the following for more details.

7.2 Food safety

Food health and safety play an important role in deciding whether tourist can finish his/her tour in the destination. They affect not only tourist's health, but also tourist's perception and evaluation towards the destination safety. According to the statistical data of this year's questionnaires (see figure 7-1), safety and health are not the problems the tourists are most concerned about, only accounting for 21.26% and 13.7% respectively. This indicates that tourists pay less attention to food safety and health. The proportions of 22.83% and 16.54% for safety and health in 2012 show that the attention the tourists pay to these two gradually decreases in 2013 and the measures taken for safety and health are recognized by tourists year after year. According to the complaints received and handled by the tourism bureau, the proportion of food safety is low.

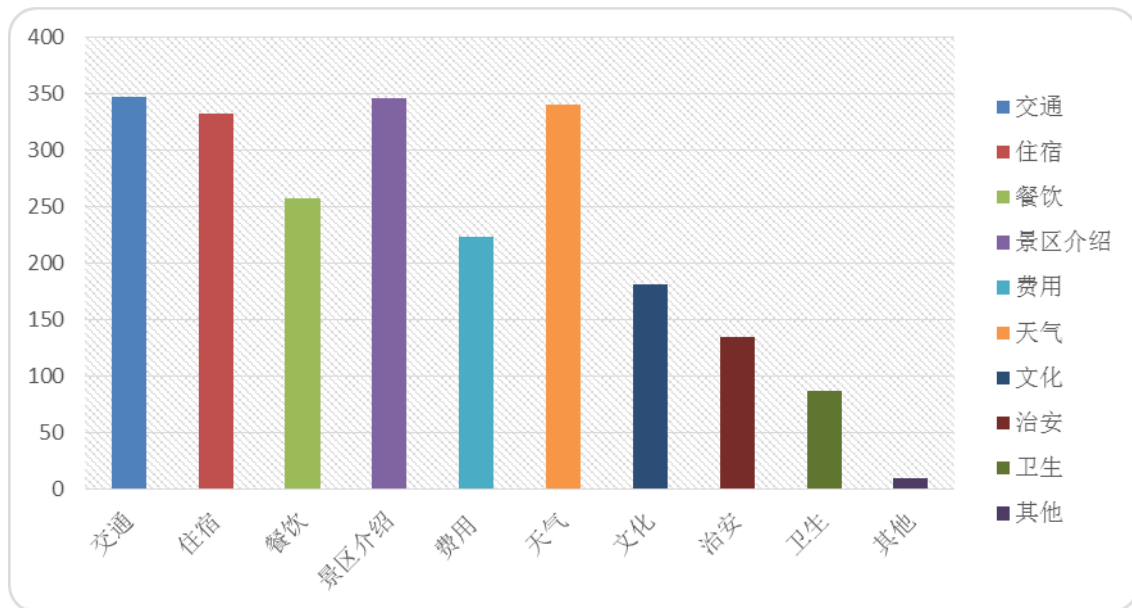


Figure 7-1 Statistical chart about Kanas information the tourists hope to acquire the most

交通 Transportation

住宿 Accommodation

餐饮 Food

景区介绍 Scenic zone introduction

费用 Cost

天气 Weather

文化 Culture

治安 Security

卫生 Health

其他 Others

Source: Kanas Tourist Questionnaire Survey in September 2013

According to the data provided by the law-enforcing department and other departments, to ensure safe tourist environment, in 2012, more efforts were made in monitoring and punishing food health and safety in Kanas compared with 2011. Food health and safety are still a major task for relevant department in 2013.

7.3 Environmental safety

7.3.1 Evaluation of natural environment quality

It is shown from figure 7-1 that tourists care more about the introduction, accommodation and transportation of the destination than sanitation. But they are interested in collecting “weather” information. This demonstrates that weather change or climate difference is the information tourists care about to avoid getting ill in face of new environment. By talking with tourists, we learn that most of them are satisfied with Kanas’s natural environment, including air quality, water, sanitation and tranquility. As the monitoring was conducted in the middle and lower month, some tourists were not satisfied because they didn’t get used to the low temperature.

The local community residents are proud of their hometown’s natural environment and are highly satisfied with it. Of course, some show their concerns: Will the boats affect the lake water? Will the increase in number of tourists bring more wastes? Will inn and restaurant operators bring negative impacts on the environment?

7.3.2 Environment safety maintenance and governance

In 2013, stricter measures were adopted by the relevant department for environment safety maintenance and governance: 1 Strictly implement three simultaneous implementation systems for environment protection. 50 self-building projects in the scenic zone have gone through the environmental assessment procedures. More efforts were made for law enforcement. Environment law enforcement inspection was carried out with local environmental protection bureau before the peak season to investigate those without going through a complete set of procedures and any pollution behaviors, such as random or secrete drainage of waste water and excessive exhaust emission by boat and interzonal vehicle. 2. Implement such pilot projects like Kanas lake environment protection and Tianbao project (II phase). A total of RMB 12 million were invested in Kanas lake environment protection (of which RMB 4 million were used for supporting facilities). The protection includes ecological governance in the surrounding area of Kanas, renovation of domestic waste water treatment

plant at the lower lake outlet, domestic wastes collection (1000 dustbin and 200 trash cans), and renovation of 100 rural toilets in Kanas village. 3. Establish an office for the committee of patriotic health movement, as well as develop and distribute a long-term institutional environment governance plan. Carry out special governance activity for environmental sanitation monthly on the basis of the daily environmental protection work and thoroughly remove the wastes along roads and wooden trestle, in all spots and around the houses in two townships. 4. Promote the upgrading of interzonal vehicles based on the construction of LNG gas station and further improve the gasification rate of interzonal vehicles. Reasonably choose the slaughter house site, make fixed slaughter become possible, and prevent new pollution source.

7.4 Community safety

Community health and safety not only relate to the interests of local community residents, but also play an important role in tourist safety. In 2013, the community safety within Kanas scenic zone is basically free of problem. The monitoring group found by talking with the community residents that residents generally thought their sanitation conditions were good enough to provide accommodation service and food. It thus reflects the local resident's confidence in health and sanitation and their initiative in tourism development. Many local residents said that it would be inconvenient to go to the county hospital if tourist became seriously ill due to closing off of the mountain in the winter. This is the biggest threat to health.

7.5 Tourist safety

Tourist perception to safety include four aspects: Behavior characteristics of travel information collection, tourism purpose preference, selection of accommodation facility and satisfaction with health conditions.

In terms of travel information preference, tourist attention to security and health has decreased this year compared with 2012: the number of tourists choosing security drops to

21.26% from 22.83% in 2012 and the number of tourists choosing health drops to 13.7% from 16.54% in 2012. These figures indicate that tourist attention to security and health is lower and more and more tourists recognize the works done for health and safety in Kanas. It is learnt from figure 5-1 that many tourists go to Kanas for sightseeing, vacation, and photography. These three purposes are relatively safe, while for relatively dangerous wild adventure, only 57 tourists chose it. As the case is basically the same as 2012, it indicates that many tourists have a high awareness of safety and basically won't participate in dangerous items. With regard to tourist satisfaction with the safety condition of scenic zone, according to the survey data, the average values of tourist evaluation of social security and resident attitude are 4.27 and 4.19, which are higher than 4.17 and 3.99 in 2012. The figures indicate tourist high satisfaction with the local safety condition.

8 Tourism resource and environmental protection

8.1 Monitoring on tourism resource and environmental monitoring

Tourism resource and environmental protection are the basis for landscape protection as well as sustainable development. The monitoring on these two is mainly based on the secondary data and interview materials provided by the relevant department to the scenic zone authority. See the following for more details.

8.2 Environment quality monitoring and governance

8.2.1 Water environment quality

The surface water system in the scenic zone is good. To protect the quality of lake water and prevent new pollution source, the scenic zone authority implemented the pilot project of Kanas lake water protection, strictly inspected boats and interzonal vehicles and established archives for inspection in 2013. Any boat and interzonal vehicle against exhaust emission standard are not allowed to be used in the scenic zone.

8.2.2 Sewage treatment

In 2012, a 2km road construction project from the second section of Jiadengyu to sewage treatment were completed. This is of significance to Jiadengyu's sewage treatment. At the same time, Kanas began to implement three simultaneous implementation systems. It not only urged the business entities to complete the application procedures for environmental approval, but also maintained a strict standard on building project's environmental approval. Any project against environmental impact assessment will be prohibited. In addition, it intensified its efforts on environmental law enforcement and strictly investigated all environmental pollution behaviors, such as random and secrete drainage.

8.2.3 Solid waste disposal

The disposal of solid waste directly influences the environmental health of the scenic

zone, which consequently affects tourist satisfaction. To improve tourist satisfaction and sustain the development of scenic zone, the government adopted a series of measures to improve solid waste disposal. 1. Preliminary establish perfect environmental sanitation facility. The solid wastes are mainly disposed by landfilling. As the environmental sanitation facilities for some hotels at Jiadengyu and Kanas lake area have been preliminarily improved, the wastes and garbage can be put together for disposal; certain number of trash cans, refuse transfer stations and toilets have been provided along the scenic zone. 2. To enhance environmental health management, in 2013, two compressed rubbish vehicles, four small refuse collectors, two fecal suction trucks, one refuse transfer stations, 500 dustbins, and two road sprinklers are provided in the villages of the scenic zone; such measures like lake ecological governance, renovation of domestic waste water treatment plant, domestic waste collection (1000 dustbins and 200 trash cans) and renovation of 100 rural toilets were implemented in Kanas village. Reasonably choose the slaughter house site, make fixed slaughter become possible, and prevent new pollution source.

Efforts were made to reasonably choose the slaughter house site, make fixed slaughter become possible, and prevent new pollution source. The current number of environmental sanitation facilities is far from satisfying tourist needs. Major nodes in Baihaba village and Naren grassland still lack appropriate environmental sanitation facilities.

8.2.4 Vegetational cover

Kanas has diversified vegetation form, which covers forest, meadow, grassland, bushwood, alpine vegetation, rock vegetation, swamp and aquatic vegetation. Its obvious vertical distribution law divides Kanas into five zones from the bottom up: Forest and meadow, subalpine meadow, alpine meadow, alpine tundra vegetation, and permanent snow mountains. Forest, bushwood and meadow are the main part of Kanas's ecological system, which brings an profound impact on the ecological environment. The forest vegetation in the scenic zone is southern taiga mountain forest, which is the only representative of West-Siberian taiga ecological system. The forest vegetation is mainly distributed on the

shady slope and half shady slope and in the valley at the attitude 2800m below the sea level. The forest coverage is 17.8% or 25.8% including bushwood.

To ensure vegetation form diversity and protect ecological vegetation, a lot of works have been made by the relevant department this year: 1. Complete the construction of Altai forest ecological system positioning research station, standard meteorological station, and comprehensive observation tower. 2. Raise a fund of RMB 18.2 million and use it for such construction projects like natural forest conservation (phase II), key non-commercial forest, conservation area ability development and Kanas lake protection. 3. Provide subsidy incentives for grassland protection, financial aid for grazing prohibition in the water conservation area and RMB 17 million of fund for grass-livestock balance. 4. Strengthen the construction of management and protection system, organize people to remove wastes in the mountain 23 times, and effective contain such illegal acts as disordered mining and illegal crossing.

8.2.5 Atmospheric environment

Kanas maintains its primitive state in most area. The number of residents in Kanas is small and most area has no man. It is a place having fresh air, high anion concentration, and low dust exposure and dustfall without air pollution source and up to national GB3095-1996 atmospheric environment class I standard. To ensure the quality of atmospheric environment, this year, the interzonal vehicles were strictly inspected and archives for inspection were established this year. Any boat and interzonal vehicle against exhaust emission standard are not allowed to be used in the scenic zone. More efforts were made to speed up the upgrading of interzonal vehicles based on the construction of LNG gas station and further improve the gasification rate of interzonal vehicles.

8.2.6 Soil environment

The types of soil in Kanas include mountain swampy soil, black meadow soil, mountain chernozem, brown coniferous forest soil, alpine and subalpine meadow soils, mountain tundra

soil, and alpine rock desert soil. Brown coniferous forest soil, meadow soil, rock desert soil and tundra soil are the most important soils in the conservation area, covering more than 95% of the soils in that area. As Kanas has few human activities and no industrial and mining enterprises, the soil environment hasn't been polluted and destroyed.

8.2.7 Acoustic environment

Kanas is a place with beautiful and tranquil environment. The noise in the scenic zone, which is composed of living noise and traffic noise, is mainly from hotels, restaurants, shops, recreational facilities, residents and vehicles. No other noise source is found except for the local impact brought by tourism at Kanas lake outlet area. The noise environment is up to national GB12348-90 noise class I standard.

8.3 Environmental protection project construction

To protect the resource environment of Kanas scenic zone, the relevant department invested a large amount of fund in environmental protection projects (see the following table). Compared with 2011, further investment and maintenance were made to the projects of resource and environment protection.

Table 8-12 List of resource and environment protection projects of 2012

No.	Construction unit	Project name	Intended investment (10,000 Yuan)	Accumulated investment (10,000 Yuan)
1	Environmental protection, construction and transportation bureau of Kanas	Demolition at the lower lake outlet of Kanas scenic zone	1660	0
2	Environmental protection, construction and transportation bureau of Kanas	Revegetation project under the load from Asian Development Bank	2000	0
3	Environmental protection, construction and transportation bureau of	National heritage site Baihaba forest park	2860	490

	Kanas			
4	Burqin forestry centre	Jiadengyu forestry centre management station	356	28
5	Environmental protection, construction and transportation bureau of Kanas	Star-rated toilet of Moon Bay	75	40
6	Environmental protection, construction and transportation bureau of Kanas	Atmospheric background station	500	470
7	Environmental protection, construction and transportation bureau of Kanas	Sanitation equipment of Asian Development Bank	512	512
8	Environmental protection, construction and transportation bureau of Kanas	Tianbao management room construction 2011	200	200
9	Altay Guanghui Natural Gas Company	Expansion of Jiadengyu gas station	55	55
10	Environmental protection, construction and transportation bureau of Kanas	Refuse landfill of Asian Development Bank	50	50
11	Land and resources bureau of Kanas	Geological relics protection project	160	160
12	Environmental protection, construction and transportation bureau of Kanas	Water and soil conservation control for the small watershed of Yegengde river in Baihaba village	190	110
13	Environmental protection, construction and transportation bureau of Kanas	Refuse landfill machine, transfer station toilet and power supply facility of Asian Development Bank	488	488
14	Environmental protection, construction and transportation bureau of Kanas	Waste collection and disposal equipment of Asian Development Bank	367	367

Tourism resource and environmental protection

15	Environmental protection, construction and transportation bureau of Kanas	Monitoring station equipment of Asian Development Bank	316	316
Total			9789	3286

9 Summary

From the tourism monitoring of Kanas, we reach the following conclusions:

9.1 Tourism and community: Difference among villages exists in community engagement and community perception is improved

According to the survey of community engagement, with the development of local tourism, the resident awareness of engagement in tourism and technology are improved, and the form of community engagement in tourism appears to be relatively stable. However, difference exists due to different tourism development state, engagement form and problem that villages have and face. As for perception to tourism impact, the community residents have higher perception to economic impact and environmental impact while the perception to social impact decreases. The dissatisfaction with infrastructure, medical condition, and traffic congestion gets worse while the perception to cultural impact basically remains the same.

9.2 Tourism receipts: With the decline of tourism economy, some enterprises suffer a setback in development

According to the survey on Kanas scenic zone and tourist enterprises, tourism receipts have become a important economic source of Kanas. However, in 2013, under influence of such adverse factors as the slowdown of domestic economic growth, the constraint of business travel and the complicated stability maintenance of Xinjiang, indicators like the number of tourists to Kanas and ticket proceeds dropped obviously. Although more tourism-related jobs are created, the local employment is low. It is found from the survey that irregular competition exists among enterprises in Jiadengyu and Kanas village and the enterprise economic benefit in Tielieketi township is limited due to small number of tourists. There are problems with the development of tourist enterprises in all regions.

9.3 Tourist satisfaction: The overall satisfaction is high and more attention shall be paid to tourism service price

According to the tourist survey, the current tourist satisfaction with Kanas is high. In addition, the scores of Kanas resource indicators are high, particularly the natural scenery. However, the evaluation of humanistic experience and activity development is low; the scores of Kanas tourism service are low. In particular, the quality and price of food and accommodation and transportation affect the overall satisfaction. Tourists are a lot more willing to recommend Kanas to others than revisit it due to long distance and high cost. Tourists are tolerant to the current construction and management, but they expect further development of the local region and scenic zone, particularly, the service standardization and quality improvement.

9.4 Tourism product and service: Tourism product update and tourism service facility improvement

According to the survey on tourism product and service, the purposes of tourists to Kanas are changed. The number of tourists for photography and wild adventure increases while the number for vacation and business travel decreases. In terms of tourist route, the road to Hemu is not available to the public due to road maintenance while the Baihaba route is very popular. Kanas is working to promote winter tourist route and three hiking routes. Over the past year, the tourism service facilities of all regions were improved, tourism management station was established and the tourism service quality was improved under quality monitoring. Kanas further improved its reputation by means of tourism festivals and special events, travel fair, media publicity and film and television transmission and won four honors.

9.5 Tourism planning and control: Implementation of new planning and difficulty in development control

According to the survey on current tourism planning and tourism development control,

Kanas revised and improved the *Overall Planning of Great Kanas Scenic Zone (2005-2020)* and prepared a *Revised Planning for Improvement of Great Kanas* to identify the future's development direction. The governmental department organized a special group to promote the planning implementation. Kanas management committee adopted the land control measure to control Kanas development, but its development control is flawed due to the government's management system problem. As to capital management, the fixed investment of Kanas was nearly RMB 200 million in 2012. There are RMB 450 million left before reaching the targeted investment amount. Capital investment risk exists as the ticket proceeds are only RMB 100 million, so it is necessary to increase income and reduce expenditure. As to transportation, the external accessibility remains the same while infrastructure improvement is seen for internal traffic. A loop line is being or ready to be built in the scenic zone.

9.6 Health and safety: The health and safety are good and the early warning mechanism needs to be strengthened

According to the survey on health and safety, no major food poison incident and compliant have been found from tourists, residents and employees. The food safety and precautionary measures have been fully considered. The nature of activities most tourists participate in is mild. They are not interested in collecting security information and speak highly of the local security. But such problems as unlicensed taxi and occasional violent incidents raise tourist's concern. Now, the natural disasters of the scenic zone mainly include fire, flood, snow disaster, hailstone and strong wind. As hiking becomes increasing popular, the early warning mechanism and the emergency plan need to be further strengthened. Man-made safety hazards mainly refer to violent crimes and traffic accidents. Political stability maintenance and traffic accident prevention have always been the focal point of the scenic zone.

9.7 Tourism and resource environment protection: The environment quality is good and more attention shall be paid to environment damage

According to the survey on resource environment, the environment quality is good and the atmosphere, soil and water are free from pollution and up to the national first class standard; the animal and plant resources are well-protected and the ecological environment is good; illegal buildings are removed gradually. The evaluation of tourists and residents to Kanas natural ecology is high, but the environment is still damaged by some tourists and operators. So, efforts shall be made to pay more attention to this regard, strengthen the resource and environment protection education to residents (especially the operators), and take incentive measures.