
黄山旅游可持续发展

监测报告

黄山风景区管理委员会

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

1.1 监测介绍

世界级风景名胜区黄山是中国山岳型旅游目的地的杰出代表。作为集中国首批十大风景名胜、中国 5A 级旅游景区、全国文明风景旅游区、世界文化与自然遗产、世界地质公园等多项国际国内桂冠于一体的旅游目的地，黄山的可持续旅游发展受到中国乃至全世界的瞩目。2008 年 2 月 26 日，世界旅游组织和联合国教科文组织正式设立世界旅游组织旅游目的地可持续发展黄山观测点和世界遗产地可持续旅游发展（黄山）观测区。目的在于通过对游客认知与满意度、旅游对社区的影响等多项指标进行长期监测，收集黄山旅游业可持续发展的多项指标数据，进而探求世界遗产地旅游经济最大化、社区受益最大化、负面环境影响最小化的发展模式。

中山大学自 2006 年开始，已经根据世界旅游组织 GOST 项目的指标与方法成功完成了中国阳朔 2006-2008 年的监测报告；2011 年 5 月 30 日，中国黄山风景区管理委员会与中山大学正式签署观测点合作建设协议，正式加入联合国世界旅游组织 GOST 项目的技术评估体系。2011 年 8 月 22 日，监测中心正式启动为期五年的黄山旅游可持续发展监测与管理工作。2012 年通过 3 月、5 月、9 月等三次实地调研，完成 2012 年黄山可持续发展监测。2013 年 8 月 28 日，监测中心继续为期 11 天的监测活动，完成对价值认同及翡翠谷案例的分析。在黄山风景区管委会的大力支持和积极配合下，中山大学于 2014 年 6 月 30 日至 7 月 7 日，派监测组前往黄山进行实地调研。希望通过全面调查黄山旅游发展产生的环境、社会及经济影响，总结其可持续旅游发展的管理经验并在全球推广。

1.2 监测方法

1.2.1 监测过程

本期监测范围为黄山风景名胜区总体规划范围（2006 年）以及缓冲区，具体包含列入黄山风景名胜区的 160.6 平方千米，及其周边的五镇一场（黄山区汤口镇、谭家桥镇、三口镇、耿城镇、焦村镇和洋湖林场，行政总面积约为 490 平方公里）。

在对第一、二、三期监测成果进行梳理总结的基础上，本期调研做出补充和调整如下：

2014年6月30日至7月7日，由中山大学旅游发展与规划研究中心（以下简称中心）的2名教授、监测中心的1名项目协调员、3名硕士生、11名本科生和1名外籍国际志愿者组成的监测小组，通过问卷、实地观察和访谈的形式，完成了对：（1）景区游客满意度；（2）黄山旅游对缓冲区五镇环境、社会及经济影响；（3）景区游客及缓冲区居民对黄山品牌的认识；（4）缓冲区中小企业对社会责任及品牌意识；（5）导游对黄山发展评价。共收回有效游客问卷424份；有效社区感知及态度问卷270份，其中汤口镇221份（汤口镇中心村61份，寨西村120份，翡翠新村（山岔村）5份，芳村19份，冈村16份），耿城镇13份，焦村镇13份，谭家桥镇10份，三口镇13份；缓冲区中小企业问卷85份；缓冲区居民对黄山品牌形象感知问卷91份；对导游、缓冲区村镇主要负责人，山岔村翡翠谷家庭旅馆经营者、景区上班者、离退休居民等进行了访谈，并收集了相关二手资料。

1.2.2 主要问题与指标筛选

结合世界旅游组织（WTO）指标方法、《黄山风景区总体规划》以及黄山风景区旅游发展实际情况，在第一、第二期、第三期监测经验的基础上，制定了本期黄山风景区旅游可持续发展的基本指标，具体见表1所示。

表1 黄山风景区旅游可持续发展监测主要问题和基本指标汇总

	主要问题	监测基本指标	是否已有常规监测	建议本项目监测频率
旅游与资源环境保护	生物多样性保护	1. 国家重点物种数量	是	5年
		2. 濒危物种种类；数量	否	5年
		3. 古树名木数量；分布状况；保护等级	是	5年
		4. 森林覆盖率	是	5年
		5. 资源保护方面的科研合作项目名称；任务；合作机构；历时时间	否	1年
		6. 新增保护措施	否	2年
	文化资源保护	7. 摩崖石刻和文物古迹的数量、保护状况	是	5年
		8. 用于文物保护（恢复、保护和维持）的	否	1年

	主要问题	监测基本指标	是否已有常规监测	建议本项目监测频率
		资金和比例		
		9. 新增政策与保护措施	否	5 年
	游客分流情况	10. 各大门的进山游客比例	是	1 年
	水环境	11. 地表水水质达标情况	是	1 年
		12. 饮用水水质达标情况	是	1 年
		13. 生活污水处理每年总量；与旺季日处理量峰值	是	1 年
	声环境	14. 生活和交通噪声达标情况	是	1 年
	大气环境	15. 空气质量达标情况	是	1 年
	固体废弃物	16. 固体废弃物年产总量	是	1 年
		17. 处理废弃物的方式	是	5 年
		18. 循环再用的废弃物总量所占比例	是	1 年
	主要景观美誉度	19. 主要景观的美誉度	否	3 年
	保护区建设面积	20. 保护区内的建设面积、集中度	是	3 年
旅游与社区	旅游发展水平	1. 社区人口总数（本地外地构成）	是	3 年
		2. 景点数量	是	1 年
		3. 住宿设施数量	是	1 年
		4. 接待到访的游客数量	是	1 年
		5. 旅游对当地社区的总体影响	否	2 年
	居民态度和影响感知	6. 居民对旅游发展的总体态度（问卷）	否	1 年
		7. 对于旅游带来的经济、社会以及文化影响的居民感知	否	1 年

	主要问题	监测基本指标	是否已有常规监测	建议本项目监测频率
	社区参与程度和意识	8. 社区居民从事旅游相关工作的比例（数量）与主要类型	否	1 年
		9. 社区居民对其旅游参与程度的感知	否	1 年
		10. 社区居民对“旅游可持续发展”概念的感知度	否	1 年
		11. 居民所关注的旅游发展相关问题	否	1 年
	商业伙伴的满意度	12. 导游及旅行社的满意度	否	1 年
游客感知与满意度	游客满意度水平	1. 游客对黄山资源、服务、整体旅游环境及其他方面的满意度水平	否	1 年
		2. 游客总体满意度	否	1 年
		3. 游客对于旅游体验是否符合预期的感知	否	1 年
		4. 游客的重游率与推荐意愿	否	1 年
		5. 黄山风景区游客投诉率	是	1 年
	游客安全	6. 游客事故发生率	是	1 年
		7. 游客对黄山旅游的安全感知	否	1 年
	游客教育	8. 参加黄山风景名胜区开展的解说教育活动的游客占总数的比例	否	1 年
旅游的经济影响	旅游收入	1. 黄山风景区接待游客总人数	是	1 年
		2. 旅游统计数据（旅游总收入、床位数、过夜人数，人均花费等）	是	1 年
		3. 周边低山景点的接待游客人数	是	1 年
		4. 周边低山景点的旅游统计数据	是	1 年
	旅游季节性程度	5. 景区旺月与淡月游客数量的比率	否	1 年

	主要问题	监测基本指标	是否已有常规监测	建议本项目监测频率
	旅游与就业	6. 旅游创造的就业机会	否	1 年
		7. 旅游从业人员的满意度	否	2 年
	旅游的经济带动作用	(专项研究)	否	3 年
组织与管理	组织管理上的成绩和社会认可度	在业界和社会上的认可度	否	3 年

报告主体内容包括旅游与资源、环境保护，旅游与社区，游客感知与满意度，结论与建议和专题研究（包括游客及社区居民对黄山品牌形象认知、黄山缓冲区中小企业的社会责任及品牌意识、导游对黄山发展评价研究三个专题）六个部分。

2 旅游与资源、环境保护

2.1 资源保护指标监测

表 2 资源保护方面的监测指标与监测结果

主题	指标	频率	相关部门	方式	本期监测结果
生物多样性保护	1. 国家重点物种数量	5 年	园林局 资保科	生物多样性普查课题	黄山目前有国家重点保护动物 28 种，国家重点保护植物 37 种。
	2. 濒危物种种类；数量	5 年	园林局 资保科	生物多样性普查课题	黄山风景名胜区现状共发现 42 种珍稀濒危动植物。对于这些物种的监测缺乏数据，因此较难确定目标种数。
	3. 古树名木数量；分布状况；保护等级	1 年	园林局 资保科	常规性监测	暂无更新。2009 年调查认定名木 69 株（含世界文化与遗产名录 54 株）；一级保护的古树 3 株；二级保护的古树 7 株；三级保护的古树 57 株；温泉辖区古树名

					木 61 株，其中列入世界遗产名录 19 株；天海辖区古树名木 39 株，其中列入世界遗产名录 24 株；芙蓉辖区古树名木 19 株，其中列入世界遗产名录 10 株；钓桥辖区古树名木 0 株。
4. 森林覆盖率	5 年	园林局 资保科	常规性 监测		1976 年资源清查资料显示，当时的森林覆盖率仅 56%，植被覆盖率 71%，活立木蓄积量 365204 立方米。1989 年景区开展的森林资源清查工作表明，森林覆盖率达 83.4%，比 1976 年增长 27.4 个百分点，植被覆盖率达 92%，增长 21 个百分点，活立木蓄积量 673438.5 立方米，增加 308234.5 立方米。2004 年国家公益林数据采集时，森林覆盖率上升到 84.7%，植被覆盖率 93%，活立木蓄积量 1580193 立方米
5. 资源保护方面的科研合作项目名称；任务；合作机构；历时时间	1 年	园林局 资保科	本监测 项目		新增《中央财政林业科技推广项目——景区栎旋木柄天牛综合防控》等项目。具体见下文表 4
6. 新增保护措施	2 年	园林局	本监测 项目		现有主要措施： 参照迎客松保护模式，将黑虎松列为专人守护对象 对迎客松钢结构应急保护平台进行升级改造 首次编撰迎客松“全景式”保护工作年报（2013 年度） 申报和实施诸多保护研究项目 开展黄山风景区第六次古树名木资源普查； 实施迎客松倒一枝常年刚性支撑杆和重点古树名木弹性支撑头改进工作； 依托研究成果，采用 APF-1 诱捕器诱杀松褐天牛成虫； 建成景区松材线虫检疫检查站电子监控系统，景区林检站及南、北、西大门检查站均被纳入系统范围。

文化资源保护	7. 摩崖石刻和文物古迹的数量/质量	5 年	政治处 文物管理科	文物普查	现存摩崖石刻 295 处；文物古迹 148 处；全国首例黄山松属“活文物”1 处（迎客松）。2012 年，修缮慈光阁大殿屋面、千僧灶、芙蓉洞等古建筑遗迹。2013 年完成了 3 处摩崖石刻、三处避雨亭亭名、两处楹联的补增工作。
	8. 用于文物保护（恢复、保护和维持）的资金和比例	1 年	政治处 文物管理科	本监测项目	2013 年初公布首批 41 处重点不可移动文化保护名录，古建筑 13 处，近现代重要史迹及代表性建筑 21 处，石窟寺及石刻、古遗址和其他类各 1 处。 2013 年文物保护各项支出 342 万元，占遗产地保护资金的 5.62% 2014 年，黄山风景区管委会政治处接国家文物局《关于黄山登山古道及古建筑——慈光阁（东、西配楼）修缮工程立项的批复》，慈光阁（东、西配楼）修缮工程通过国家文物局审批立项，已将慈光阁东、西配楼修缮工程项目列入年度目标任务，计划于年底实施完成。
	9. 新增政策与保护措施	5 年	政治处 文物管理科；规划土地局遗产办	本监测项目	2006 年 9 月 21 日，制定专门的《黄山风景区文物保护暂行规定》。启动了黄山文物保护总体规划编制工作
分流情况	10. 各大门的进山游客比例	1 年	集团公司统计科	本监测项目	2013 年景区累计接待入山游客 274.65 万人。其中云谷寺（南门）接待入山游客 1144.81 万人，占比 52.73%，慈光阁（南门）接待入山游客 99.39 万人，占比 36.19%；松谷庵（北门）接待入山游客 30.45 人，占比 11.09%。南大门依然是主要的游客进山入口，相比 2012 年，游客进山分流情况基本一致。

资料来源：根据调查资料整理

2.2 生物多样性保护评估

2.2.1 概况

根据《生物多样性公约》，所谓生物多样性就是地球上所有的生物体及其所构成的综合体。它包括遗传多样性，物种多样性和生态系统多样性三个层次。

生态系统多样性方面，黄山处于中纬度亚热带地区，气候受东南季风控制，典型的森林生态系统，发育有大面积的亚热带森林（包括常绿阔叶林、常绿落叶阔叶林、落叶阔叶林、针阔混交林等。山顶部分还分布有针叶林），森林覆盖率达 75%以上。

物种多样性方面，黄山动植物种类丰富，其中国家级保护动物 28 种，国家级保护植物 37 种，详见表 3。

表 3 黄山市动植物种类

	总体种类	国家级保护种类
动物	野生动物有鸟类 176 种，两栖类 21 种，爬行类 48 种，鱼类 24 种，兽类 54 种，共计 323 种，约占安徽省野生动物种类的 2/3。	国家级保护动物 28 种。其中，国家一级保护动物 7 种（其中鸟类 2 种：白颈长尾雉、白鹳；兽类 5 种：华南虎、云豹、金钱豹、黑麂、梅花鹿）；国家二级保护 21 种（其中鸟类 10 种：鸳鸯、黑冠鹃隼、赤腹鹰、勺鸡、白鹇、小鸦鹃、褐林鸢、雕鸮、普通鵟（kuang）、毛脚鵟；两栖类 1 种：大鲵；兽类 10 种：短尾猴、猕猴、穿山甲、豺、黑熊、大灵猫、小灵猫、金猫、獐、鬣羚）。
植物	（现已发现）高等植物 222 科 826 属 1805 种，超过中国总数的 7%	国家级保护植物 37 种，其中国家一级保护植物 5 种（中华水韭、银杏、水杉、红豆杉、南方红豆杉）、二级保护植物 16 种（水蕨、华东黄杉、金钱松、香榧、鹅掌楸、凹叶厚朴、天竺桂、夏蜡梅、金荞麦、连香树、榉树、长序榆、黄山梅、花榈木、杜仲、香果树）；三级保护植物 16 种（南方铁杉、天目木兰、黄山木兰、天女花、天目木姜子、延龄草、天麻、短穗竹、短萼黄连、八角莲、领春木、紫茎、青檀、黄山花楸、银鹊树、明党参）。

基于黄山地区丰富的生物多样性，在 IUCN 确定的世界 108 个生物多样性分布中心中就包含

了黄山地区（江南丘陵和浙闽山地，IUCN Conservation office, 1990. 评价标准：植物物种多样性）；在中国最新确定的 33 个生物多样性保护优先区域中也包含黄山地区（评价标准：大自然保护协会“生态区评估”方法体系）。在 CBPF（中国多样性伙伴与合作框架）中，黄山地区生物多样性不可替代性指数在中国华东地区也是最高的，是该地区最值得保护的生物多样性热点地区。以上证据说明，黄山地区的生物多样性具有全球重要意义。

2.2.2 保护现状

黄山风景区一直以来都非常重视生物多样性保护工作，本轮调查显示，目前黄山风景区总体上生物多样性保护状况是非常好的。其具体措施包括：

（1）**生态环境保护**方面，黄山风景区管委会组织编制了公园生态环境保护规划等多个专项规划，建立了 ISO14001 环境管理认证体系并成功创建 ISO14000 国家示范区，首创了景点封闭轮休制度，倡导和实践低碳旅游，投资 2 亿余元对公园南部门区进行了搬迁和生态修复。

建立专门机构，整合资金资源和技术力量，在全国同类公园率先实现“污水统管”，完成了生态环境背景值调查并启动生态环境观测站建设。强化“三全”防火，建成了 5 座资源保护管理站和红外线林火自动监测系统，实现连续 35 年无森林火灾，且成功阻止松材线虫病传入景区。建成了西海、芙蓉岭污水处理站和温泉、云谷垃圾收集中转站，率先在全国山岳型景区开展 PM_{2.5} 监测，启动实施“黄山地区生物多样性保护”GEF 项目。

印发《黄山风景区 2014 年生态环境监察和环保专项行动工作方案》，完善“景点封闭轮休、污水统管、垃圾下山、油烟净化”等措施，做到污水达标排放、垃圾日产日清。

2013 年，景区组织开展了整治违法排污企业保障群众健康环保专项行动，加大日常执法和监管力度，持续做好生态环境监察工作，取得了显著成效。

（2）**古树名木**方面，2009 年完成景区第五次重点古树名木调查。通过确定黄山风景区内所有古树名木的基础资料、具体地点、海拔高度、保护级别、树龄等资料建立古树名木名录档案。对重点古树名木实施“一树一册”的保护与管理制度，针对每一棵古树名木都建立起了长期监测、专家咨询、守护和应急等保护管理体系。

（3）**科研合作**方面，黄山风景区园林局近几年来持续与一些科研单位和高校合作，开展生物多样性调查、古树名木保护、生态维护方面的项目研究工作，实施“三道防线”项目，严格进山检疫检查，强化源头管控。参照迎客松保护模式，将黑虎松列为专人守护对象，实行 24 小时

守护;对迎客松钢结构应急保护平台进行升级改造;首次编撰迎客松“全景式”保护工作年报(2013年度);申报和实施《中央财政林业科技推广项目——景区栎旋木柄天牛综合防控》项目;研制新型玻璃纤维材质的树干护裙和护篱,更新植被保护设施;建立“景区博士后科研工作站”,启动博士后工作站研究课题《黄山松空洞无损探测和腐朽防治研究》项目;开展黄山风景区第六次古树名木资源普查;实施迎客松倒一枝常年钢性支撑杆和重点古树名木弹性支撑头改进工作;依托研究成果,采用 APF-1 诱捕器诱杀松褐天牛成虫;建成景区松材线虫检疫检查站电子监控系统,景区林检站及南、北、西大门检查站均被纳入系统范围。本次监测在前两期监测报告的基础上,更新补充了近年来景区在生物多样性保护方面的研究课题。

表 4 新增生物多样性保护方面主要的研究课题列表

名称	任务	合作单位	历经时间
1、黄山风景区重点古树名木防断裂倒伏风险性评估	对景区 136 株古树名木进行无损检查;对有腐朽、缺陷的古树名木的断裂倒伏风险性作出分析评估并提出科学防护方案;建立黄山风景区古树健康档案库	安徽农业大学	2010 年 7 月 — 2015 年 7 月
2、.微生物防治黄山松红蜘蛛关键技术研究	筛选 2 个寄生能力强、速度快、致死率高的真菌;对中选菌株进行安全性检测;研究探索菌株繁殖和孢子提取工艺的产业化技术;研制开发广谱、持续、高效、复合菌剂制品;研制自动真菌孢子喷发装置。	黄山学院	2013 年 1 月 ~ 2016 年 12 月
黄山地区生物多样性保护与可持续利用	针对黄山市的国家级风景名胜区、国家级和省级自然保护区等区域生物多样性保护与可持续利用的政策、规划及机构建设,现有保护区的管理和网络建设,保护区的威胁因素分析、生物走廊建设和替代生计研究,能力建设、公众环境意识教育与提高,保护区信息发布与经验共享等五大板块内容	全球环境基金(GEF)	2012—2016 年。 已启动准备阶段工作(2012 年 1 月—2013 年 4 月)
黄山松空洞无损探测及腐朽防治研究	采用 TRU 树木雷达检测仪对迎客松、黑虎松两株重点名松进行腐朽状况检测;确定黄山松心材腐朽病病原菌;筛选出防治黄山松心材腐朽病的低毒高效抗真菌药物,并设计出可操作性强、防治效果好的施药方法;提出黄山松心材腐朽病防治的具体建议和方法,该项成果将直接用以指导开展重点古树名木心材腐朽病的防治工作	南京林业大学	2014 年 1 月 — 2016 年 12 月
黄山风景区生物多样性观测	设立 1 个 10 公顷固定样地、2 个 1 公顷固定样地和 6 条 1.5 公里样线,开展生物多样性长期固定监测	环境保护部南京环境科学研究所、南京林业大	2014 年 4 月 — 2016 年 12 月

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(4) **宣传教育**方面, 黄山风景区管委会多次组织活动向公众、游客、周边社区等宣传教育有关黄山的生物多样性内容的具体措施, 力求拉动各个利益相关者共同保护黄山风景区的生物多样性。

2.3 文化资源评估

2.3.1 概况

黄山地处文化历史悠久的古徽州, 文化遗产丰厚。目前, 黄山风景名胜区总体规划将其文化资源分为以下三类: 摩崖石刻; 历史建筑物; 博物馆收藏(包括非物质类文化遗产, 即神话传说、黄山画派、诗词散文、书目辑存、历史遗迹名单、历史事件等)。其中, 摩崖石刻在黄山风景名胜区物质类文化资源中占有格外重要的历史地位, 是黄山历史事件和到访过黄山的历史名人的见证, 具有重要的历史价值; 充分体现了古人的文采和中国书法的意境, 具有重要的美学价值。

根据文物普查数据, 黄山现存摩崖石刻 295 处, 主要分布在温泉、玉屏、北海、云谷和松谷等各大景区景点和磴道沿线的岩石崖壁, 2012 年, 在 2011 年补增摩崖石刻的基础上, 遗产管理部门继续完成了 3 处摩崖石刻、三处避雨亭亭名、两处楹联的补增工作。记录了不可移动文物点 60 处, 并于本年公布黄山风景区第三次全国文物普查不可移动文物 42 处(包含黄山摩崖石刻群、黄山登山古道、黄山松等); 古道、石桥、古寺、古亭、古墓等古建筑遗迹 150 多处。另外, 在非物质文化遗产方面, 黄山是黄山画派的发源地, 该画派历数百年而不衰, 以黄山为题材的书法、绘画、摄影作品难以计数, 历代歌颂黄山的诗词歌赋达 2 万多首(篇)。

2.3.2 保护现状

(1) **保护机构设置**方面, 黄山风景区管委会具体细化了各部分的文物保护和管理工作: 政治处文化发展中心设置了文物管理科、博物馆, 为全山文物保护职能机构, 负责景区文物保护管理, 负责各历史时期文物、史料收集, 负责世界遗产、遗迹的陈列工作; 规划土地处设置遗产办, 负责全山世界遗产的管理。

(2) **政策支持**方面, 除国家层面及安徽省层面的各种文物保护与管理规定外, 2006 年 9 月 21 日, 黄山风景区专门制定了景区层面的《黄山风景区文物保护暂行规定》以指导和约束黄山风景区内部文物保护的工作。

(3) **文物认定**方面, 黄山风景区目前共有 4 处省级重点文物保护单位 (慈光阁、观瀑楼及听涛居、黄山摩崖石刻群、黄山古观景亭); 其中黄山登山古道以及古建筑和黄山摩崖石刻群双双被国务院公布为第七批全国重点文物保护单位, 实现黄山风景区国保零的突破。

(4) **长期监测**方面, 除全国性文物普查登记外, 黄山风景区实施了景区范围的文物普查工作, 并长期辅以人工监测。目前, 已对普查的 668 个自然景观和 331 个文化景观建立清单, 结合整个黄山风景区的信息化系统建设工作, 在文物保护方面, 电子普查数据库正在建设和完善过程中。

(5) **文物保护与修缮**方面, 全山省保立牌的保护

目前, 黄山风景区近年文物保护与修缮费用汇总如表 5 所示。

表 5 黄山风景区文物保护与修缮费用 (万元)

	2003	2004	2005	2006	2007	2008	2009	2010	2011
慈光阁	3	10	73	/	125	37	/	52	200
观瀑楼	/	5	/	70	/	/	/	/	/
灵锡泉	6	/	/	/	/	/	/	/	/
松谷庵	30	/	/	/	/	/	/	/	45
钓桥庵	/	21	/	/	/	/	/	/	/
半山寺	/	/	/	/	/	70	/	/	/
其它	/	/	/	20	/	150	32	80	755
合计	39	36	73	90	125	257	32	132	1000

说明: 1、文物保护与修缮费用总计: **2126 万元**。

2、本年度 (2013 年) 文物保护各项支出 **342 万元**, 占遗产地保护资金的 **5.62%**。

资料来源: 风景区管委会政治处文物管理科

(6) **重要文化景观“复原”**方面, 始终坚持“保护为主、抢救第一、合理利用、加强管理”的文物工作方针, 加大专项资金与文保科技投入, 积极开展文物保护与文化景观“复原”工作, 取得了突出成绩。自上世纪九十年代以来, 实施完成的文保项目工程主要有:

时间	文保项目工程
2014 年 4 月	对景区 4 条古道、6 处古屋、1 处古关、5 处古亭、12 处古桥、2 处古泉、1 处古洞门、3 处古墓塔及部分摩崖石刻作了实地调查。对一些文物古迹、摩崖石刻的图文史料进行了完善补充，对修建于明成化年间（1465—1487）的二龙桥（北桥）进行了刈灌清杂保护，并委托专业资质单位完成了慈光阁东、西配楼修缮方案设计。
2012 年	实施完成慈光阁大殿屋面、千僧灶、芙蓉洞等古建筑遗迹修缮工程；增补 3 处摩崖石刻；为新建的 2 处避雨亭题写亭名、楹联；完成慈光阁藏品库房视频监控与防火报警系统安装工程。
2012 年 4 月	实施完成槩庵大师塔维修工程。
2011 年 12 月	实施完成慈光阁放生池维修工程。
2010 年 11 月	实施完成慈光阁古建筑屋面维修工程。
2009 年 9 月	实施完成慈光阁、黄山古观景亭、黄山摩崖石刻、观瀑楼与听涛居等四处省保立牌保护工程。
2008 年 5 月	实施完成黄山风景区博物馆标准化文物库房建设工程。
2007 年 10 月	实施完成半山寺古建筑修缮及防雷工程。
2007 年 8 月	实施完成慈光阁古建筑群防雷设施完善工程。
2005 年 10 月	实施完成慈光阁山门、普门塔、千僧灶、法眼泉古迹抢救修复及周边环境整治工程。
2004 年 10 月	实施完成观瀑楼油漆出新与屋面维修工程。
2004 年 12 月	实施完成钓桥庵古建筑落架修缮及周边环境整治工程。
2003 年 8 月	实施完成慈光阁名人书法碑廊保护加固工程。
2003 年 7 月	实施完成灵锡泉发掘修复工程。

2003 年 5 月	实施完成松谷庵古建筑落架修缮及周边环境整治工程。
1999 年	实施完成毗卢殿古建筑屋面、木构整体修缮工程。
1995 年 11 月	实施完成观瀑楼整体修缮和环境整治工程。
1991 年	实施完成毗卢殿古建筑落架修缮工程。

2.4 环境保护指标监测

表 6 环境保护方面的监测指标与监测结果

主题	指标	频率	相关	方式	本期监测结果
水 环 境	1. 地表水水质达标情况	1 年	风景区环保办	生态环境监测站常规性工作	地表水：2012 年水质监测数据：优于国家 GB3838-2002 I 类标准；2013 年出境地表水全年按季度监测 4 次，监测结果均符合国家地表水环境质量标准 GB3838-2002 II 类，合格率 100% 泉水：2008 年监测，水质良好。
	2. 饮用水水质达标情况	1 年	风景区环保办	委托市环境监测站	黄山风景区水库饮用水源水质达标率 100%。
	3. 生活污水处理每年总量；与旺季日处理量峰值	11 年	风景区污管站	常规工作	生活污水年处理总量约 70 万吨，旺季（一般指“五一”和“十一”期间）处理量峰值为 2700 吨/日，平均每年污水总量为 5-万吨。
声 环 境	4. 生活和交通噪声达标情况	11 年	风景区环保办	委托市环境监测站	暂无更新。只有 2006 年监测数据。详见 2.5。

大气环境	5. 空气质量达标情况	11年	风景区环保办	空气自动连续监测系统	2013年黄山风景区空气质量皆优于国家一级标准,空气中所含二氧化硫(SO ₂)、二氧化氮(NO ₂)、一氧化碳(CO)以及可吸入颗粒物(PM ₁₀)年均值皆远低于国家一级标准。
固体废物	6. 固体废弃物年产生总量	11年	环卫部门	常规检测	2013年固体废弃物年产量为4289.27吨。
	7. 处理废弃物的方式	15年	环卫部门	本监测项目	目前为焚烧、生物处理、填埋、废品回收和有机垃圾回收利用相结合的方式;危险废物单独回收,运输和放置处理。
	8. 循环再用的废弃物总量所占比	11年	环卫部门	本监测项目	2013年循环再利用垃圾总量为400吨,占比为9.33%

资料来源:根据调查资料整理

为全面贯彻党的十八大、十八届三中全会及全国环保专项行动电视电话会议精神,黄山风景区管理委员会同意并通过了《黄山风景区2014年生态环境监察和环保专项行动工作方案》,以持续开展环保专项行动,推进生态环境监察,切实解决危害群众健康和影响可持续发展的突出问题。

2.5 水环境评估

2.5.1 地表水水质

黄山风景名胜区为国家级风景名胜区,按照《地表水环境质量标准》(GB3838—2002)中水域功能划分标准和黄环字〔1993〕第38号文件关于黄山市水域功能划分办法,黄山风景名胜区地表水资源执行国家Ⅱ类标准。目前景区的监测单位将景区的地表水资源分溪水、泉水和水库水三种类型监测。

溪水水质监测方面,黄山风景区设有四个监测点位:九龙瀑、黄山大门、松谷庵和焦村双龙

潭，监测项目有酸碱度、溶解氧、氨氮、高锰酸盐指数、和五日生化需氧量五类，按照监测项目对其水环境质量状况进行相应的时间序列分析。本期调研获得 2013 年 3 月、6 月、9 月、11 月的地表水监测数据。数据显示，黄山风景区地表水质量优良，均达到或好于《地表水环境质量标准》（GB3838-2002）中 II 类水质要求，合格率 100%。

泉水水质监测方面，景区有泉 15 处，根据 2008 年对其主要的 4 处泉眼（温泉水、鸣弦泉、松谷泉、法眼泉）的水质进行监测分析的结果，黄山风景区泉水水质较好。

2.5.2 饮用水质量

根据《安徽省环境保护条例》及《安徽省城镇饮用水水源环境保护条例》的规定，为做好景区饮用水水源安全保护和监测工作，景区自 2011 年第四季度起开展饮用水源水质委托监测（监测单位为黄山市环境监测站），将五里桥水库、云谷水库、天海水库、西海水库四个主要水库设为检测对象，并及时将结果予以公告。

本次调研活动收集了 2013 年四季度的四个水库饮用水源水质的检测结果，数据表明黄山风景区饮用水源水质达标率 100%。详见表 2.5

表 7 2013 年饮用水源水质检测结果(单位: mg/L, PH 除外)

监测点 位	监测 时间 范围	溶解 氧 ≥6	PH 6-9	高锰 酸钾 指数 ≤4	氨 氮 ≤ 0.5	总磷 ≤0.025	氟化 物 ≤ 1.0	挥发酚 ≤ 0.002	石油 类 ≤ 0.05	粪大肠菌群 (个/L) ≤ 2000
五里桥 水库	第一 季度	9.81	6.76	0.6	0.0 25 (L)	0.01 (L)	0.14	0.0003 (L)	0.03	10(L)
云谷水 库		9.72	6.55	0.6	0.0 30	0.01 (L)	0.14	0.0003 (L)	0.03	10(L)
天海水 库		9.56	6.69	1.6	0.1 03	0.01 (L)	0.09	0.0003 (L)	0.03	20
西海水 库		9.67	6.33	0.7	0.0 36	0.02	0.07	0.0003 (L)	0.04	20
五里桥 水库		6.51	7.21	2.51	0.1 12	0.02	0.69	0.0003	0.04	10(L)

								(L)		
云谷水库	第二季度	——	——	—— —	— — —	——	——	—— —	—— —	——
天海水库		6.42	6.84	3.44	0.1 95	0.02	0.22	0.0003 (L)	0.04	880
西海水库		6.87	7.10	3.31	0.1 76	0.02	0.26	0.0003 (L)	0.04	131
五里桥水库	第三季度	7.15	6.91	1.97	0.1 29	0.02	0.96	0.0003 (L)	0.03	109
云谷水库		7.15	7.05	1.68	0.1 58	0.02	0.49	0.0003 (L)	0.03	20
天海水库		6.42	7.11	2.90	0.3 44	0.023	0.33	0.0003 (L)	0.04	1296
西海水库		6.79	6.98	2.44	0.2 31	0.02	0.21	0.0003 (L)	0.02	132
五里桥水库	第四季度	8.58	7.18	1.10	0.0 78	0.01 (L)	0.17	0.0003 (L)	0.03	10(L)
云谷水库		8.49	7.03	1.10	0.0 83	0.01 (L)	0.07	0.0003 (L)	0.02	10(L)
天海水库		8.05	6.99	2.07	0.2 11	0.01 (L)	0.05 (L)	0.0003 (L)	0.04	10(L)
西海水库		8.24	7.18	1.71	0.1 52	0.01 (L)	0.05 (L)	0.0003 (L)	0.02 (L)	10(L)

说明：1. 意即低于检测限；

2. 第二季度时，采样期间，政治云谷水库放水清淤，无法正常采取水样，故此第二季度监测缺云谷水库数据；

总的来说，2013 年景区饮用水源水质样品均送往黄山市环境监测站进行检测。根据《安徽省城镇生活饮用水水源环境保护条例》第十四条的规定，生活饮用水地表水源一级华宁保护区内

的水质，适用国家《地面水环境质量标准》II 标准；检测结果表明所委托检测项目达标率 100%。

2.5.3 污水处理

生活污水方面，景区从 1986 年起共建有 13 处污水处理站，分别为玉屏片、西海片（在建）、温泉片、半山寺、风景区管委会大楼、急救中心、天海、北海片、狮林片、云谷新索道、云谷片、松谷片、芙蓉岭（在建）。设计日处理能力达 7000 吨以上，已经逐步对其污水站进行升级改造，现已完成 3 处（天海、温泉、玉屏），预实现自动化控制和 24 小时视频监控，其中玉屏和温泉两处站点的污水排放标准已经提升至 GB18917-2002《城镇污水处理厂排放标准》一级 A 标准。

2014 年公布的《黄山风景区 2014 年生态环境监察和环保专项行动工作方案》要求严格执行《水污染防治法》，加强对饮用水源保护区隐患排查，对可能影响生活饮用水源保护区水质的环境污染和安全隐患问题进行整治，确保景区水环境安全；定期公布饮用水水环境质量。

2013 年景区污管站提供的数据显示，供水总量为 70 万吨，其中生活污水年处理总量达到 50 万吨（2014 年）。旺季（一般指“五·一”和“十·一”期间）日处理量峰值为 2700 吨/日。；2012 年，在温泉地段整体改造项目中，计划新建中水利用设施。

2.6 声环境评估

黄山风景区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，分为生活噪声和交通噪声。

噪声控制方面，有两项措施能够促进风景区的噪声监测以及噪声控制工作的开展：（1）2004 年 9 月黄山风景区成立了新国线旅游客运有限公司，禁止个体户和中巴车进入景区，交通噪声得到进一步的改善；（2）黄山风景名胜区监测站已于 2005 年启动噪声监测工作。

本期调研获得黄山风景区环保办委托黄山市环境监测站于 2006 年 6 月 20 日 4 个点的交通噪声和 11 个点的区域噪声的监测结果显示：“交通噪声测点全部达标，区域噪声测点云谷寺、玉屏楼两测点超标，超标值分别为 3.5dB（A）和 0.9dB（A），为景区游客大声喧哗所致。”

2.7 大气环境评估

黄山被全球环境基金的高级顾问曲格平赞誉为“人类生态第一山”。世界卫生组织规定的“空气清新”标准是空气中负氧离子数为 1000—1500 个 / cm。通过黄山风景区生态环境监测站统计

数据显示,该景区负氧离子常年稳定在 2 万个 / cm 以上,2014 年 2 月份月度负氧离子含量最高值 27460 个/cm。瞬间峰值可查询记载高达 267100 个 / cm,超世界卫生组织的“空气清新”标准 267 倍。

黄山风景区对环境空气质量监测始于 1988 年,早期全凭人工采样和手工分析,而且仅监测 TSP、NO₂、SO₂ 三项指标。2004 年初景区开始建设空气自动连续监测系统,九月底全面建成。本次调查获得 2013 年的监测数据,如下表 8 显示结果可知,黄山风景区环境空气质量符合环境空气质量标准 GB3095-2012 一级标准。

表 8 黄山风景区空气质量统计表(单位: mg/m³)

监测时间	污染物名称	年均值	国家年均值标准(一级)
2013	SO ₂	11	20
	NO ₂	8	0.04027
	PM ₁₀	27	0.02406
	CO	1.627	4
	PM _{2.5}	15	15

(国家一级标准: CO 单位为 mg/m; SO₂、NO₂、PM₁₀、PM_{2.5} 单位为 ug/m³)

资料来源: 黄山风景区生态环境监测站

2.8 固体废弃物处理

与城市相比,黄山风景区的固体废弃物年产出数量较小,且年产生量总体上呈平稳趋势,产生量的年际波动主要源自开发建设产生的建筑垃圾数量以及入山人数的变化。黄山固体废物主要分布在三个区域,一是游道附近,二是宾馆酒店等经营场所,三是职工生活区。

为切实提高景区有机垃圾处理科学化、无害化水平,确保垃圾下山工作取得实质性进展。环保专项工作方案规定:

(1) 引进餐厨垃圾生物处理工艺,推动酒店有机垃圾分类收集,促进景区有机垃圾减量化处理。

(2) 以景区隔油池残渣的规范清理、无害化处置为试点,启动“两渣一泥”等易腐有机垃圾的全面下山进程,杜绝填埋对土壤、水源、植被等生态系统产生的污染破坏。

(3) 开展核心景区废旧物资集中整治,严厉打击非法排放、破坏景区生态环境的违法行为。

(4) 对核心景区“三边一间”(建筑物周边、工地周边、游道两边、林间)的废旧物资开展全面排查,明确责任单位,按照“三步走”(立即整治一批、逐步整改一批、重点整治一批)的要求,督促清运下山。

目前黄山风景区对固体废弃物进行严格的分类管理:危险固体废弃物根据其类型不同(医疗废物、废弃的变压器、废试剂、废墨盒、废电池等)分别由环卫部门和相关部门按照严格的危险废物管理制度专门收集、运转和存放。一般固体废弃物分建筑垃圾和生活垃圾,对建筑垃圾严格执行申报、监督与验收制度,对生活垃圾的处置也采取了一系列的措施,包括减量化、资源化(回收利用)以及无害化(完善处理系统)。其中较为突出的几方面措施包括:

(1) 建立采购配送中心,实现净菜上山,尤其是蔬菜类、禽类和水产类均经过除杂、加工、洗净后方可运输上山,减少垃圾产出;

(2) 全面实行垃圾袋装化(袋装率达 100%),减少二次污染;并加强垃圾分类制度,从源头到过程都积极推进垃圾分类工作;

(3) 日常清洁依靠人工作业,旅游高峰期利用索道清运垃圾;

(4) 完成环卫专项规划,以全面推进“山上垃圾山外处置”系统工程。

根据 2008-2010 年统计数据,景区固体废弃物主要为生活垃圾,年产量约为 4000 吨,2012 年固体废弃物年产量为 4766.08 吨,2013 年固体废弃物年产量为 4289.27 吨,下降了 10.0%。处理方式现已优化为全部运下山处置(仅少量通过微生物分解或者生物降解),运至黄山市垃圾处理场(填埋、就地焚烧、循环利用);循环再利用的废弃物总量约为 400 吨,占比为 9.33%,循环利用效果明显的同时也有很大的上升完善空间。

3. 旅游与社区

3.1 社区监测指标

在前期监测的基础上,本期监测结合 WTO 指标方法、黄山风景区总体规划以及黄山风景区旅游发展实际情况完善了旅游与社区监测的基本指标,具体见表 9 所示。

表9 旅游与社区监测指标与监测结果(本期监测结果的部分重新写, 参考 2.1)

主题	指标	频率	方式	本期监测结果
社区基本情况	1. 人口(本地外地人口构成)	3 年	统计资料	
	2. 面积、行政区划 (与黄山风景区毗邻的自然村的比例)	3 年	统计资料	详见 3.2.1.
	3. 人均耕地面积变化情况	2 年	统计资料	详见 3.2.1.
	5. 村办企业及招商引资情况	2 年	统计资料、 调研	详见 3.2.3
社区经济发展水平与漏损情况	6. 居民就业情况	2 年	统计资料、 调研	详见 3.2.3
	7. 景点数量	1 年	统计资料	详见 3.2.3
	8. 住宿设施数量	1 年	统计资料	详见 3.2.3
	9. 接待到访的游客数量	1 年	各乡镇政府	详见 3.2.3
	10. 旅游对当地社区总体影响	2 年	问卷、访谈、实地考察	详见 3.4
社区环境及资源保护状况	11. 村容村貌	2 年	问卷、访谈、实地考察	详见 3.3.
	12. 垃圾处理			
	13. 污水处理			
	14. 森林保育			
社区建设与社区关系	15. 基础设施建设	1 年	问卷、访谈、实地考察	详见 3.4
	16. 社区民生建设			
	17. 精神风貌建设			

	18. 社区关系			
居民 态度和影 响感 知	19. 对于旅游带来的经济、社会及文化影响的居民感知	1 年	问卷抽样调查+访谈	详见 3.4.2
	20. 社区居民旅游发展的总体态度			详见 3.4.1
	21. 社区居民所关注的旅游发展相关问题			详见 3.4.5
	22. 社区居民对“旅游可持续发展”概念的感知			详见 3.4
	24. 社区居民对其旅游参与程度的感知	1 年	本监测项目问卷抽样调查；访谈	详见 3.4.3。
	25. 社区居民对“旅游可持续发展”概念的感知度	1 年	本监测项目问卷抽样调查；访谈	详见 3.4.3
	26. 社区居民所关注的旅游发展问题	1 年	本监测项目问卷抽样调查；访谈	详见 3.4.5。

下文将根据上表所列指标，将社区监测成果从五个方面进行归纳总结：发展水平、环境状况、居民态度与影响感知、社区小企业发展状况和黄山居民品牌感知。

3.2 四镇发展水平

3.2.1 基本信息

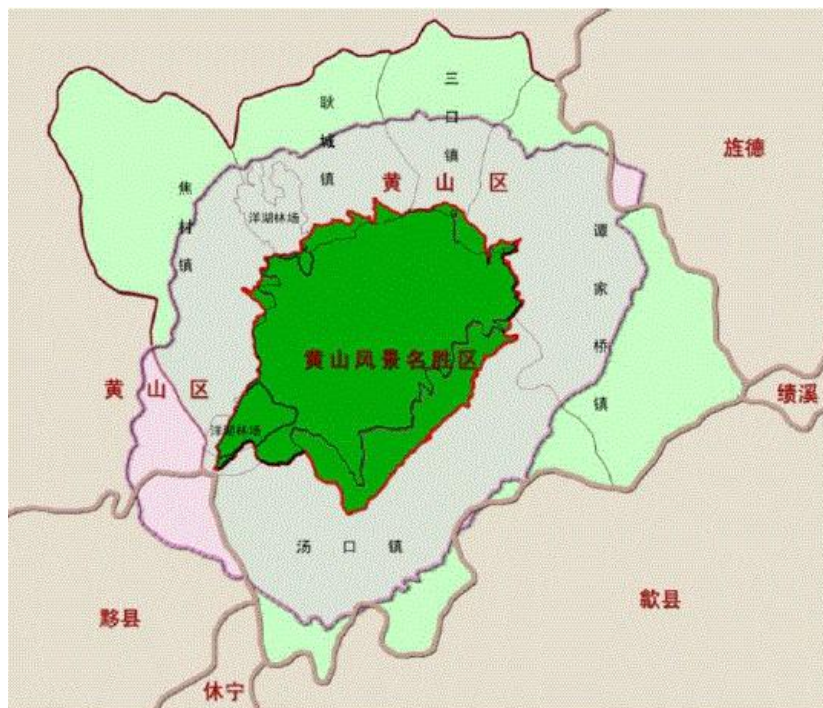


图1 黄山风景区及其毗邻镇区图¹

资料来源：黄山风景名胜区总体规划 2007-2025

根据黄山风景名胜区总体规划（2007-2025），黄山风景名胜区占地 160.6 平方公里，缓冲区范围包括与之相邻的五镇一场，即黄山风景区汤口镇、谭家桥镇、三口镇、耿城镇、焦村镇和洋湖林场（见图 1）。其中，本期监测的案例地是汤口镇、谭家桥镇、耿城镇和焦村镇等四个镇。

表 10 中显示了四个镇的人口、面积、区域规模、与黄山风景区相毗邻的行政村以及镇政府所在地等基本情况。

表 10 四镇人口、地域基本信息汇总

镇名	常住人口（人）	面积（km ² ）	区域大小	毗邻黄山（共 16 个行	政府
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¹来源：黄山风景名胜区总体规划 2007-2025

	本地	外地		行政 村	村民 组	政村)	驻地
汤口镇(南)	15755	4733	129.35	5	74	山岔、汤口、寨西、芳村、冈村	汤口村
谭家桥镇(东)	7686		136	4	49	中墩、新洪、长罗村	中墩村
耿城镇(北)	8890		85.8	5	51	城澜村、辅村、沟村	金桥村
焦村镇(西)	14765		259	14	107	章村、刘村、汤刘村	陈村

资料来源：根据调研资料整理

上表显示了四个镇的人口、面积、区域大小、毗邻黄山风景区的行政村以及政府驻地这几项基本情况。可以看出，无论是本地人口还是外来人口，均以汤口镇的为最多，而且外来人口占常住人口的比例也是最高的，反映了汤口镇的特殊地理位置——汤口镇地处黄山南大门，其所有行政村都与黄山毗邻，与黄山的地域联系最为密切。另外，四镇中焦村镇的区域面积最大，而且它还是黄山区面积最大、农业人口最多的建制镇。

3.2.2 农业经济发展现状

表 11 四镇农业经济发展现状统计表

镇名	主要产业	农村人均年纯收入
汤口镇	农、林业(木、竹、茶等)、旅游业	12374(2012)
谭家桥镇	农、林业(木、竹、茶等)、外出务工	11690(2013)
耿城镇	农、林业(木、竹、茶等)、外出务工	12490(2013)
焦村镇	农业(木、竹、茶、山珍)、家禽养殖业、外出务工	10958(2013)

数据来源：调研组访谈收集资料

表 11 统计了黄山风景区周边四镇农业经济发展现状，其中汤口镇的农村人均纯收入 2013 年的数据无法获得(目前未从雪晴得到回复)，其余三镇的数据均为 2013 年的数据。由数据可以看出，汤口镇在 2012 年的农村人均纯收入已经高于谭家桥镇及焦村镇 2013 年的农村人均纯收入，而与耿城镇 2013 年的农村人均纯收入相差无几。可见，汤口镇由于其优越的地理位置，旅游业发展相对其他三镇较早且较为成熟，经济发展水平较高，农村人均年纯收入较高；其他三镇经济

水平差距不大，焦村镇稍微落后一点，在 2013 年均表现出较强的增长趋势。

汤口镇境内山多地少，林地总面积 11142.77 公顷，园地 1091.42 公顷，耕地总面积仅 156.33 公顷。农业以茶叶种植为主，另外还有茶油、香榧和笋干等产量较大的农产品。林业以种植毛竹为主，而且毛竹面积在逐年地扩大。除此之外，还有一些茶叶加工厂以及养殖场，以养猪为主。由于耕地越来越少，而且有些耕地不太适宜种植，因此汤口镇的种植业比较薄弱，主要种植的农作物有水稻、玉米、马铃薯、油菜等，不能自给自足。



图 2 冈村的玉米地

谭家桥镇的主导产业为农业，其次是旅游业。粮食种植以水稻为主，兼有旱、杂粮，旱杂粮有麦类、玉米、薯类、荞麦、高粱和豆类；还有生产茶叶、毛竹及木材为特色，新洪村更有养蚕的桑园；家禽养殖以鸡、鸭、鹅为主，家畜养殖主要以猪、牛为主。如今，茶叶已经成为谭家桥镇的主导产业。

耿城镇农民种植作物以水稻、茶叶、毛竹为主。由于耕地不多而且面积有减少趋势，农业的收入大部分来自于林场的经营收入和牧业收入。整体来看，林业的收入比种植业的高一些，林场目前还是重要的集体收入来源。对几个居民的访谈发现，虽然耕地不多，但是粮食自给自足没有问题。林场的果实主要销往周边本地市场，木材竹材都在区里进行初级加工然后销出去。

焦村镇是黄山区面积最大，农业人口最多的建制镇。其龙源村位于焦村镇中心位置，农业作物主要以水稻、油菜、西瓜和药材垂盆草为主。近年来，随着产业结构的调整，又种植特色农业食用菌，成立了农村专业合作社。该村农田较多，主要种植水稻，可见鸡鸭等家禽的饲养。由于受旅游的影响较小，当地的村民基本认为焦村旅游没有得到开发，希望旅游开发，但所抱希望不

大。

小结：总体而言，此四镇的主要农产品为水稻、茶叶、毛竹。其粮食种植以水稻为主，除汤口镇外，水稻种植大多可以自给自足。各镇森林覆盖率高，其林业以种植茶叶、砍伐山场的毛竹等树木为主，产出的毛竹基本上销售给城区园区的大型企业，茶叶则是茶厂收购进行统一加工，然后运往位于黄山区政府驻地的甘棠镇茶叶交易市场销售。饲养的家禽为鸡鸭鹅，家畜主要是猪。

从调研情况来看，各个村镇结合自身资源优势有侧重地发展了多项农、林产品。从供应链条上看，除了部分留作自给自足，大部分通过黄山区的交易市场流向整个黄山市境内以及周边省市。

3.2.3 旅游经济发展现状

表 12 缓冲区低山旅游景点及招商引资项目

镇名	近期招商引资项目	低山旅游景点	旅游就业
汤口镇	黄山洲际徽商国际大酒店、黄山徽梦谷国际度假村、老城改造酒店群项目等 9 个新开工的项目；九龙乡村文化旅游综合体项目、汤口新城、翡翠旅游度假村二期工程等 3 个续建项目；总投资达 25.91 亿	翡翠谷、九龙瀑、凤凰源、猴园、幸运河景区、芳村大竹海	旅游景区经营、农家乐、景区景点工作、宾馆酒店等旅游产业服务员、汤口镇旅游服务公司及新国线工作
谭家桥镇	黄山东大门旅游综合开发、东黄山旅游度假区、亲和谷等 20 个在建项目，总投资接近百亿；2013 年新签项目有油茶综合开发项目、上汽会所项目、如意谷项目等 5 个项目，共引进市外资金 9 亿元	石门峡、东黄山旅游度假区、大鲵科技繁育园、红军北上抗日先遣队纪念馆	农家乐经营、景区景点工作、酒店餐馆等旅游服务等工作等
耿城镇	辅村芙蓉谷和金桥村虎林园、藏宝园（辅村新项目）、金桥科技工业园、以五星级的福泰酒店为代表的酒店度假村、美瑞集团的“森林故事”住宅地产、中国人民大学的环境学院的监测基地、金桥浦西嘉园	黄山虎林园（2009）、芙蓉谷景区（2007）、藏宝园（辅村新项目）、金桥浦西嘉园	景区景点工作、农家乐经营（集中在辅村）、酒店餐馆等旅游服务等工作等

焦村镇	安华山庄、西海家园、西峰山庄、龙胜影视基地、车友宿营俱乐部、佛文化主题公园等	地轨缆车、翠微寺、郭村古村落、九华峰自然保护区	以农家乐为主（有60家）、景区基建、服务员、导游等
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数据来源：访谈资料整理、耿城镇人民政府网站

从表 12 对近期招商引资项目的统计可以看出，四镇中发展最好的是位于南大门的汤口镇和北门的耿城镇。汤口镇得益于和黄山景区的密切联系，在房地产、大型度假酒店等项目开发上进展较快，低山景点经营情况也很乐观，居民对旅游的参与度高。耿城镇凭借与黄山区政府的地缘关系（邻近区政府所在的甘棠镇），发展较早，工业是其主要产业，其境内主要是一些生态型工业项目。其余两镇谭家桥、焦村镇由于地理位置劣势、发展起步晚等，引进项目资金较少，项目推进较慢。而近两年，由于西海大峡谷地轨缆车的建设、黄山风景区对西门重视度的提升，焦村镇签约及续建项目有所增加。

表 13 2013 年缓冲区景点接待游客与门票收入统计

年份 景点	门票人数（万人）				门票收入（万元）			
	2011 年	2012 年	2013 年	同比增长	2011 年	2012 年	2013 年	同比增长
翡翠谷	88.74	116.45	121.6	4.42%	3754.05	5516.91	5558.79	0.76%
九龙瀑	41.56	54.99	53.6	-2.53%	1003.49	1604.58	1562.68	-2.61%
凤凰源	21.51	30.93	27.9	-9.80%	210.61	349.93	309.78	-11.47%
猴园	3.84	5.94	4.9	-17.51%	33.31	65.55	49.53	-24.44%
幸运河景区	——	——	18.7	——	——	——	590.94	——
芳村大竹海	——	——	3.7	——	——	——	111.33	——
石门峡	21.86	27.12	30.1	10.99%	587.39	813.66	830.65	2.09%
东黄山	21.77	27.44	28.8	4.96%	——	——	1331.9	——
红军北上抗日先遣队纪念馆	——	——	10.4	——	——	——	136.06	——

黄山虎林园	8.02	9.05	——	——	400.35	414.48	——	——
芙蓉谷	63.76	78.29	——	——	1634.62	1836.45	——	——

数据来源：访谈资料整理

表 13 反映了 2013 年缓冲区低山景点旅游接待人数和门票收入情况。从表中数据可以看出，尽管一些主要景点的门票人数和门票收入在 2012 年保持了良好的上升状态，但在 2013 年却只有轻微的上升，甚至是呈现下降趋势，如九龙瀑、凤凰源、猴源等，而这些景点均分布在汤口镇，原因可能是随着旅游的发展，黄山风景区对其周边景点的带动作用达到饱和状态，游客数量因此达到或者接近顶峰。此外，石门峡、东黄山等位于谭家桥镇的景点呈现出上升的趋势。尽管如此，汤口镇的景点还是最多，而且门票人数和门票收入比其他三镇要高，反映出旅游景点的发展由于地理位置、资源条件等的差异而不平衡。

表 14 黄山风景区缓冲区星级农家乐汇总表

	省级					市级			区级			合计
	5 星	4 星	3 星	2 星	1 星	3 星	2 星	1 星	3 星	2 星	1 星	
汤口镇	1	4	1	3	0	8	1	1	28	1	0	48
谭家桥镇	1	0	2	3	0	0	0	5	0	0	1	12
焦村镇	0	0	3	2	0	0	1	0	0	0	0	6
耿城镇	1	0	1	2	0	0	0	0	0	0	0	4

资料来源：黄山区政府网站

表 14 为黄山风景区缓冲区星级农家乐四镇分布情况，境内农家乐的数量及质量是该镇旅游发展程度的表征之一。上表数据显示，汤口镇旅游发展程度较高，游客量大，境内农家乐的数量和质量均明显高于其他三镇，汤口镇农家乐的数量远多于其他三镇农家乐数量总和，且其评定为省市级农家乐的数量也明显多于其他三镇。其他三镇境内，农家乐数量相对较少，且分布较为分散。谭家桥镇近年来积极进行招商引资，推进低山景区的建设，吸引近程客源市场和黄山客源，农家乐数量相对较多。焦村镇农家乐数量、质量不及谭家桥镇，旅游发展程度相对较低，但随着西海大峡谷的开发，其可能能够带动焦村镇旅游的发展和基础设施的开发建设。耿城镇农家乐数量略低于焦村镇，是四镇中发展最为缓慢的城镇。

3.2.4 小结

黄山风景区缓冲区四镇旅游发展呈现汤口镇领头，耿城镇、谭家桥镇、焦村镇继后的态势。南大门的汤口镇由于其优越的地理位置，旅游业最早发展起来，黄山旅游对汤口镇的经济带动最大、带动面也最广。

3.3 缓冲区的环境状况

关于缓冲区的环境状况，本次调研了解了四个镇的村容村貌、垃圾处理、污水处理及森林保育等方面的内容。

3.3.1 村容村貌

总的来说，四个镇的村容村貌建设都卓有成效。道路的修建使得各村各镇之间的交通更加便利，电网水网的改造也改善了村民的生活。距离黄山风景区较近的村落比较现代化，如寨西，道路两旁都是一些商铺，几乎看不出来它是一个村子；而距离风景区较远的村落则比较有乡村风格，如冈村、芳村等，种着庄稼养着家禽家畜。

如今，不断有村民在建新房，尽管新房和旧屋的风格相去甚远，但新建的房屋都是按照规定来建的：统一的徽派建筑，黑白辉映；统一的楼高楼距，整齐划一。当然，建筑垃圾等使得村子看起来有点乱，但总体来说，村容村貌在向更好的方向发展。



图 2 汤口镇冈村在建的新房图

图 3 耿城镇浦西嘉园商业街

3.3.2 垃圾处理

关于垃圾的处理，各镇基本上都设有垃圾箱、垃圾桶和垃圾处理点，定期会有保洁人员回收处理。如汤口镇的冈村雇有 8 个清洁工，清理村里面的垃圾，村子到处可见垃圾桶和垃圾房。据了解，垃圾主要来源于生活垃圾和建筑垃圾，在梅雨时节，村民会自发清理自家门前的河道。所以，冈村整体来说比较整洁。

另外，值得一提的就是焦村镇已经提出一个垃圾中转站项目建议书，预算资金 139 万，引进一批垃圾处理设备，旨在出台一套垃圾处理政策，建立一支农村卫生清洁队伍，完善一批垃圾处理设施，制定一套健全的工作制度，组织开展一系列卫生保洁活动，创评一批卫生村，由此可见焦村镇对改善本镇生活环境的决心。



图 4 冈村的垃圾房

3.3.3 污水处理

至于污水处理，可以看出各镇在此方面比以前各有进步。以前除了耿城镇金桥村（与甘棠镇统一建设），其余的镇基本没有建立起污水排放系统，污水直排河流造成较为严重的污染。但本次监测发现，各镇基本上建有污水排放管道和线路，调研的时候发现河流都很清澈，没有受到污染。如耿城镇的污水都是通过排污管排走，到区里处理，现在镇有正在建设的污水处理系统；谭

家桥也建设了完备的排水道来处理污水；从汤口镇冈村村委会的村干部口中得知，冈村的污水来源主要有卫生间污水、养猪等家畜产生的污水以及生活污水等，目前有污水处理厂，负责把收集到的污水进行处理。另外，冈村在政府的支助下正在设计污水处理线路。受访的几位村民都认为冈村有对污水进行处理，目前冈村的河流和生活用水都不受污染。



图5 冈村清澈的小溪

下表是关于2014年黄山各镇的江河湖泊治理和专项资金分配，该表列出了与本次调研有关的镇在该方面的情况。其中，耿城镇共投资3850万元建设城区饮用水源保护工程，而焦村镇的两个整治工程也耗资2100万元。此外，虽然谭家桥镇暂时没有整治项目，不过也提出了一个“谭家桥镇污水处理厂及污水收集管网系统工程可行性研究报告”。由此可见各镇对污水治理的重视。

表15 2014年江河湖泊治理与保护专项资金分配表((黄山区)公示

项目名称	责任单位	合计 (万元)	资金来源		中央资金分配备注
			申报中央 资金	地方配 套	
城区饮用水源保护 二期工程	耿城镇	3850	2850	1000	其中：耿城镇：2650；农发 办：200

秧溪河流域村落综合整治工程	焦村镇	810	660	150	其中：焦村镇：485；太平湖镇：175
舒溪河流域村落综合整治工程	焦村镇	1300	1200	100	其中：焦村镇：840；乌石镇：360

资料来源：黄山区环境保护局

3.3.4 森林保育

与黄山风景区毗邻的 16 个行政村每年需要承担重要的防火护林任务。黄山风景区管委会与周边乡镇的管委会办公室、综合治理办公室以及防火办均有联系。根据访谈（防火办会提供相关资料），整理出缓冲区与黄山风景区毗邻的 16 个行政村每年对黄山风景区承担的职责与收益情况如下：

风景区管委会每年会给每个村子（按照合并前的村域标准）2-3 万元的资金补助，用于各村防火工作的开展，如防火器材库的建立、防火人员工资发放以及其他日常管理事务等。各镇每年轮流安排一个项目，做一些基础设施完善、道路修建、保证环境卫生等工作。根据风景区管委会在周边村划出的几万亩公益林，按照大概 10 块钱一亩公益林的补偿费，一年就累计了十几万元给村镇轮流做项目，景区每年会定期前来验收。

2001 年，黄山风景区周边划出了 4 公里隔离带，所涉及的村镇居民无偿砍伐了隔离带内所有的松木树种，为松材线虫病的预防做出了巨大牺牲。近几年，毗邻村还要承担防止驴友进山发生安全隐患的行为。

访谈中发现，在森林保育工作方面，主要体现在退耕还林和森林防火。上文已经提及了森林防火的方面，至于退耕还林，各镇也都积极配合。据了解，退耕还林是政府的一项政策，也是一项全国性的政策。在汤口镇冈村访谈的时候，有村民认为起初有的村民想不通，不够配合退耕还林，因为此政策减少了本来就不多的耕地。该村民则认为方法不太对，比如说水田就不应该退耕。但也有非常支持该政策的村子，如耿城镇辅村。据该村的村长介绍和村民反映，退掉耕地以后种上经济林，林地仍属于村民，林地的经济产出基本上比原来耕地还高。林地不但有经济效益还有生态效益，而且除了林地的经济产出以外，政府还对退耕农户有生活费的补贴。不过随着耕地越来越少，现在退耕还林的进程基本停下了。

3.4 缓冲区居民态度和感知

对缓冲区居民态度和感知的测量，监测对象包括黄山风景区缓冲区内五个镇的居民，调查方式以问卷调查为主，辅以非结构性访谈，在开展调研的多个村落中，重点关注与黄山景区直接毗邻村的村民。在2014年7月的调研中共发放有效问卷270份，其中汤口镇221份【汤口镇中心村61份，寨西村120份，翡翠新村（山岔村）5份，芳村19份，冈村16份】，耿城镇13份，焦村镇13份，谭家桥镇10份，三口镇13份。社区居民态度和感知测量的问卷在内容设计主要涉及黄山旅游发展的经济、社会、文化、环境影响以及居民态度等内容，问卷发放对象主要为各镇中旅游发展程度相对较高以及作为镇政府驻地的行政村村民。在问卷设计上，采用了李克特5级量表，即对量表中每题给出5个备选答案，这五个答案按照同意程度递增顺序排列，相应赋值为1、2、3、4、5，并对问卷结果进行描述性统计分析。

此外，监测员对缓冲区五镇政府相关工作人员进行了访谈，了解各镇的旅游招商引资进展、旅游收入等情况。

3.4.1 居民总体感知与态度

从整体指标上看，同意或者非常同意黄山景区为本地发展做出很大贡献这一观点的居民比例达到了71.9%，从五分量表采集到的数据看，这一指标均值3.74，说明总体上缓冲区居民认可黄山景区对本地发展的正面影响。

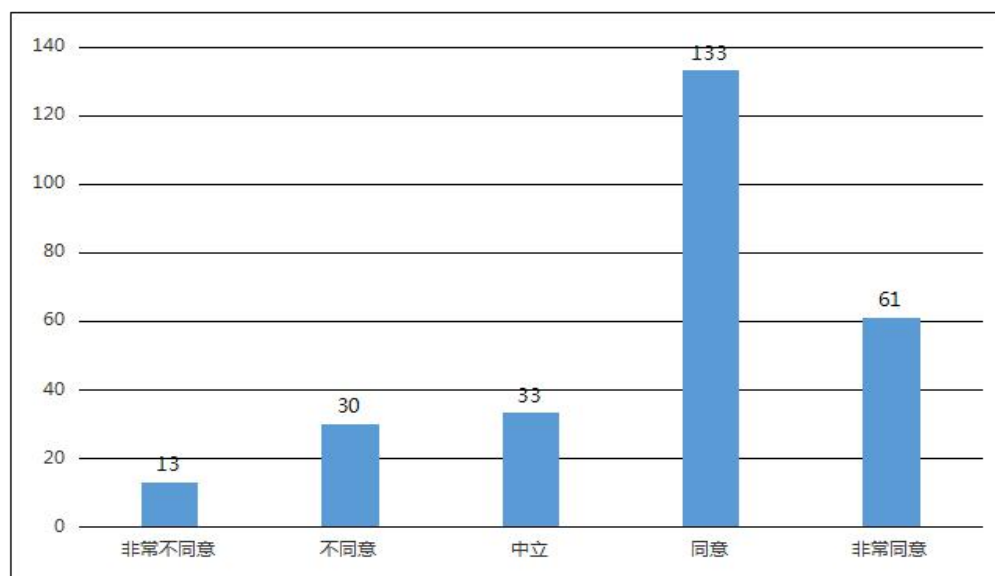


图6. 对“黄山景区对本地发展做出很大贡献”这一说法的认同程度

从分区域采集的数据看，对黄山景区贡献认同程度最高的是耿城镇和汤口镇山岔村（翡翠新

村所在地), 认同程度最低的是焦村镇和谭家桥镇。

表 16 对“黄山景区对本地发展做出很大贡献”这一说法的认同程度均值

	耿城镇	三口镇	汤口镇				焦村镇	谭家桥镇
均值	4.23	3.92	3.74				3.38	3.30
		翡翠新村	汤口村	冈村	寨西村	芳村		
均值		4.2	3.80	3.75	3.72	3.53		

在黄山发展的整体满意度方面, 对黄山发展现状满意和非常满意的居民比例达到了 58.5%, 从 5 级量表采集到的数据看, 该指标均值为 3.44, 说明总体上看缓冲区居民对黄山目前的发展感到满意, 但满意度并不很高, 大多数居民对黄山旅游发展期望很高, 认为还有很大的发展空间。从分区域采集的数据看, 对黄山发展最满意的是耿城镇和汤口镇冈村, 最不满意的是汤口镇汤口村和寨西村。辅助访谈发现, 汤口镇毗邻黄山南大门, 尤其汤口村, 居民对黄山旅游发展有很高的期望, 而在寨西村的发展路径中政府规划性质明显, 使得寨西村民的旅游参与在一定程度上呈现被动, 加之寨西正处于村社区城镇化的进程中, 社区转型问题不可避免地会对居民的满意度造成一定影响。

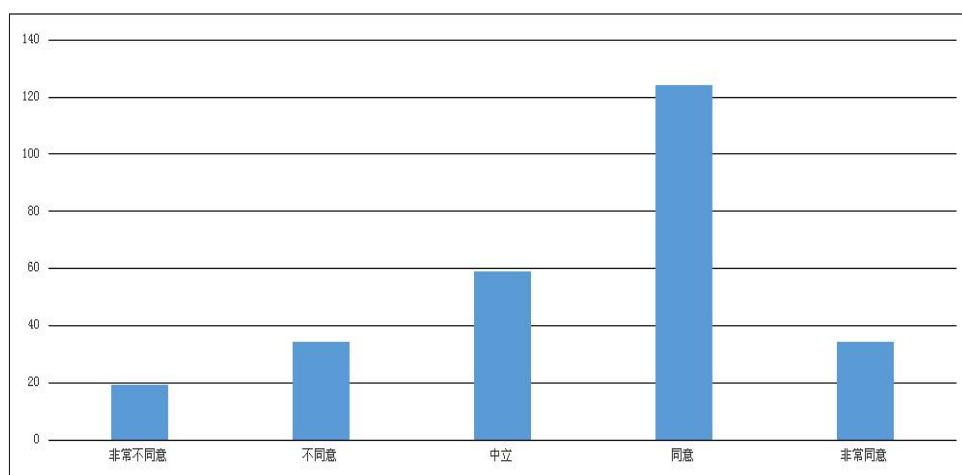


图 7 对“对黄山发展很满意”这一说法的认同程度

表 17 对“对黄山发展很满意”这一说法的认同程度

耿城镇	三口镇	焦村镇	谭家桥镇	汤口镇
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均值	3.85	3.62	3.46	3.40		3.39
				冈村	翡翠新村	芳村 寨西村 汤口村
均值				3.81	3.6	3.58 3.36 3.25

3.4.2 旅游带来的经济、社会、文化、环境影响感知

本次监测在问卷中设计了基于李克特 5 级量表的体系,对缓冲区居民对旅游带来影响的感知作了测量,旅游影响感知指标分为经济、社会、文化和环境四类,感知均值和赞同率最高的几个指标是“旅游发展促进本地经济发展”、“旅游发展改善道路水电”和“旅游发展使老房被拆新房增加”,感知均值均高于 3.90,赞同率都在 80%以上;感知均值和赞同率最低的几个指标是“旅游发展改善医疗设施”、“旅游发展改善教育条件”、“旅游发展使民俗和文化被破坏和淡忘”和“旅游发展带来更多的空气污染”,赞同率都在 45%以下,感知均值低于 3.3。具体结果如下表所示:

表 18 旅游影响感知测量结果

指标	均值	标准差	赞同率
对经济影响的感知	3.78	0.983	
旅游促进本地经济发展	4.03	0.922	86.30%
旅游发展使物价上涨	3.88	0.977	72.60%
旅游发展使贫富差距增大	3.78	0.858	67.40%
旅游发展带动就业	3.43	1.067	58.50%
对社会影响的感知	3.612	1.019	
旅游发展使老房被拆新房增加	4	0.873	85.60%
旅游发展改善道路水电	3.9	0.848	80.40%
旅游发展使得交通拥挤	3.69	0.931	61.10%
旅游发展改善教育条件	3.29	1.04	43.30%

旅游发展改善医疗设施	3.18	1.113	40.70%
对文化影响的感知	3.43	0.993	
旅游发展促使本地和外地文化交流	3.78	0.871	73.30%
旅游发展增加地方节庆丰富日常活动	3.44	1.001	54.40%
旅游发展使民俗和文化被破坏和淡忘	3.07	0.977	33.30%
对环境影响的感知	3.55	1.008	
旅游发展使垃圾增多	3.8	0.98	76.30%
旅游发展使村里的卫生环境改善	3.76	0.871	74.40%
自然保护区设立对环境教育和保护生物多样性作用明显	3.66	0.847	67.00%
旅游发展使村民捕杀砍伐动植物的行为减少	3.51	1.064	61.10%
旅游发展使水被污染	3.5	1.069	58.90%
旅游发展使噪声增多	3.48	1.026	59.60%
旅游发展带来更多的空气污染	3.13	1.034	38.50%

(1) 经济影响

从采集到的居民感知数据显示黄山风景区旅游发展在一定程度上确实促进了缓冲区五镇经济发展,增加了当地就业机会,但是同时也带来了物价上涨、贫富差距拉大的问题。总体上,高达 86.3%的社区居民肯定了旅游对当地经济的推动作用。有 58.5%的居民表示旅游发展促进就业机会增多,这一指标相较于去年比例有所下降,访谈一些认同旅游发展拉动就业这一观点的居民大部分没有深切感受到这一转变,而是“想当然”地认为旅游发展会促进就业,而不少当地或者附近地区来务工的年轻人,都不同程度表达了就业难的困扰,并且本次监测仍有 21.5%的居民(主要是年轻人)认为其目前生活中最大困难是就业。

表 18.1 旅游经济影响感知测量结果

指标	均值	标准差	赞同率
对经济影响的感知	3.78	0.983	
旅游促进本地经济发展	4.03	0.922	86.30%
旅游发展使物价上涨	3.88	0.977	72.60%

旅游发展使贫富差距增大	3.78	0.858	67.40%
旅游发展带动就业	3.43	1.067	58.50%

72.6%的居民认同或非常认同旅游使本地物价上涨,相较于去年比例有所上升,并且有30.0%的人认为当前生活中最大困难是物价,尤其在汤口镇,居民抱怨旅游发展、游客增多的同时也拉高了物价水平,而普通农民、基层工作者工资水平等没有随之提升,物价提升也增加了其生活负担。此外,有67.4%的居民同意或非常同意“旅游发展使本地居民的贫富差距扩大”这一说法,但当问及贫富差距增大的具体表现时,鲜有居民能说得清楚,居民对这一概念的感知是相对模糊的。

(2) 社会影响

首先考察旅游发展对黄山风景区缓冲区五镇道路、水电等设施建设和老房拆迁新房建设的带动。从数据上看,80.4%的居民同意旅游发展带动了道路、水电等设施的改善。85.6%的居民认为旅游发展使老房子被拆迁,新房子增加,这一比例相较去年提高了近6个百分点,道路设施的建设是不少村落城镇化的表现之一,缓冲区五镇不少原来落后的乡村,修好了宽阔的公路,招商引资也随之被带动,道路通车后也带来了新的交通问题,61.1%的居民同意旅游促使交通变得拥挤,这一比例比去年增长了8个百分点,在某种程度上,旅游发展促使交通拥挤的趋势呈现愈演愈烈的形态。

表 18.2 旅游影响感知测量结果

指标	均值	标准差	赞同率
对社会影响的感知	3.612	1.019	
旅游发展使老房被拆新房增加	4	0.873	85.60%
旅游发展改善道路水电	3.9	0.848	80.40%
旅游发展使得交通拥挤	3.69	0.931	61.10%
旅游发展改善教育条件	3.29	1.04	43.30%
旅游发展改善医疗设施	3.18	1.113	40.70%

而相比其他方面的影响,旅游发展对区域医疗条件的提升不那么显著,仅有40.7%的社区居民同意或非常同意医疗条件有所提升,该比例比上一次监测的52.6%还低12个百分点,更有将近一半的居民对此持消极否定态度,从5级量表平均值3.18来看,总体上居民对医疗方面的影响持中立态度,辅佐访谈得到的信息显示,大部分居民几乎感受不到医疗条件的提升,在走访过

程中,监测员了解到虽然设置了黄山风景区医疗急救中心,但是急救中心更多的是针对游客和工作人员,对于当地居民,他们在此就医的频率不高。总体而言,五镇居民的医疗条件受旅游影响不大,当地居民表示小病一般就近在当地卫生站、小医院就医,大病要去屯溪或者更远的医院,而在一些旅游接待设施非常完善的地方,却同时存在医疗设施的缺失,如在汤口镇寨西村,还观察到相当多的居民抱怨医疗条件不能满足社区需求,这呈现的是一种旅游接待型社区的特点,自身社区生活服务的功能确实不完善的,这也是阻碍当地居民生活水平进一步提高的障碍。

旅游对于教育水平的影响更为薄弱,仅有 43.3%的居民同意教育水平有所提高,辅助访谈的结果显示,不少居民不认为旅游发展对教育的提高能有多大的带动作用,认为教育水平完全没有提高的居民达到了 20.4%。从访谈的结果看,居民表示小学、初中可以就近上学,但是高中仍然要去其他区县,并且就近学校的教学质量不高。在黄山旅游发展的同时,周边政府对于社区居民的教育投入的关注较少。在各镇居民反映的村里关于环境教育和生物多样性保护方面的培训或讲座次数方面也可以体现,79.6%的居民表示村里没有或者不知道有此类培训或讲座;仅有 3.7%的居民认为此类讲座很多或较多,而当监测员就问卷与被访者进一步详谈时了解到,这部分村民对题意理解存在偏差,将政府不要乱丢垃圾、护林防火之类的宣传词与培训、讲座混淆,这样看来,当地居民实际上缺乏接受关于环境教育和生物多样性保护方面的培训的渠道。

(3) 文化影响

各个指标监测的结果和去年监测的结果相差甚微,73.3%的居民认同或非常认同“黄山游客、外来打工者促进了本地和外地的文化交流”这一说法,但在具体的访谈中,大部分居民还是表示游客这一群体总是来去匆匆,与居民之间鲜有深刻的文化交流。另外,在黄山旅游发展和文化交流的同时,也衍生了一些节庆活动。此次调查中,54.4%的居民同意旅游发展增加了节庆活动,丰富了当地居民的生活,比如翡翠谷的情人节活动、三口镇的油菜花节等,同时访谈发现,在该问题中持中立或不认同态度的居民,本身很少关注或参与当地的节庆活动。居民对黄山旅游施于五镇传统文化的负面作用感知程度较弱,对“黄山旅游的发展使得本地民俗文化遭破坏和淡忘”这一说法的认同程度均值仅为 3.07,仅有 33.3%的居民认为旅游使民俗和传统文化被破坏和淡忘,但也有更多居民表示本地自身不具备有特色的民俗习惯和传统活动,居民对于当地特色的认知和保护程度较为有限。

表 18.3 旅游影响感知测量结果

指标	均值	标准差	赞同率
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对文化影响的感知	3.43	0.993	
旅游发展促使本地和外地文化交流	3.78	0.871	73.30%
旅游发展增加地方节庆丰富日常活动	3.44	1.001	54.40%
旅游发展使民俗和文化被破坏和淡忘	3.07	0.977	33.30%

(4) 环境影响

黄山旅游对缓冲区五镇的环境负面影响主要表现在垃圾增多和水污染方面, 76.3%的居民认为旅游发展, 带来大量游客的同时, 也带来了更多垃圾, 提到垃圾处理时, 有 71.1%的居民表示附近社区都有垃圾处理的地方, 但不少居民反映这些垃圾处理场所的处理能力不怎么样或者处理方法不当; 58.9%的人认为当地的水源被污染, 未经过处理的污水被直接排入河流中, 造成了河流水质变差甚至被污染。而且这不仅影响了当地村镇的水环境, 同时也波及了下游地区, 比如谭家桥镇的麻川河, 受上游汤口镇水污染的影响, 水质变差。另外, 噪声、空气污染其次, 59.6%的居民同意旅游发展使得噪声增多, 这一比例与去年相比几乎没有变化, 据居民反映, 这些噪音主要来自道路上增多的机动车辆以及修路建房等工程施工引发的噪音; 38.5%的居民认为空气被污染, 相比上一次监测的结果 47.7%的比例下降了超过 9 个百分点, 从访谈的情况看, 缓冲区居民对于当地的空气质量满意度还是较高的, 不少居民表示, 虽然旅游发展带来了更多尾气污染, 但山区的空气仍然让人满意。值得一提的是, 仅有 5.56%的居民在多选题中表达了对黄山自然和居住环境的不满。

表 18.4 旅游影响感知测量结果

指标	均值	标准差	赞同率
对环境影响的感知	3.55	1.008	
旅游发展使垃圾增多	3.8	0.98	76.30%
旅游发展使村里的卫生环境改善	3.76	0.871	74.40%
自然保护区设立对环境教育和保护生物多样性作用明显	3.66	0.847	67.00%
旅游发展使村民捕杀砍伐动植物的行为减少	3.51	1.064	61.10%
旅游发展使水被污染	3.5	1.069	58.90%
旅游发展使噪声增多	3.48	1.026	59.60%
旅游发展带来更多的空气污染	3.13	1.034	38.50%

黄山旅游对缓冲区五镇环境的正面影响则主要表现为环境卫生的改善和村民环保意识的增强。74.4%的居民认为村里的环境卫生条件明显改善，与去年基本持平，前面提到居民认为旅游带来了更多的垃圾，但同时环卫工作、垃圾处理等也有了较大程度的改进，如在人口较多的公路周边垃圾桶数量明显增多，有环卫工人定时进行垃圾清扫，有专门的垃圾处理厂统一处理垃圾等。67.03%的居民认为周边自然保护区的设立对环境教育和生物多样性保护作用明显，61.1%的居民表示现在捕杀或砍伐保护类动植物种的数量明显减少，28.1%的居民表示其逐渐了解了周边有需要受到保护的野生动植物。数据显示，村民对生物多样性保护的现状基本满意，但总体而言，政府的教育宣传力度较为薄弱，居民自身对动植物保护的关注度不高，各村镇几乎没有开展针对居民的环境教育和生物多样性保护方面的培训或讲座，村民也因忙于工作或娱乐，对了解环保知识缺乏积极性。

3.4.3 居民旅游参与感知与旅游支持度

表 19 旅游参与与支持度测量结果

指标	均值	标准差	赞同率
保护自然环境很重要	4.37	0.893	92.90%
为保护环境会使用清洁能源	4.07	0.859	84.10%
会继续支持黄山发展	4.07	0.914	85.90%
渴望发展旅游	4.06	0.898	87.03%
愿意主动为景区的发展提出建议	3.83	0.838	71.80%
黄山景区为本地发展做出很大贡献	3.74	1.078	71.90%
愿意从事与旅游相关的工作	3.69	0.991	66.30%
对黄山发展很满意	3.42	1.126	58.50%
景区做决策时会听取我们的意见	2.68	1.177	27.70%

66.3%的居民表示其愿意从事与旅游相关的工作，71.8%的居民表示愿意主动为景区的发展提出建议，但仅 27.7%的居民表示景区在做决策时会听取社区居民的意见，甚至比上次监测获得的数据 35.3%还低近 8 个百分点。总体而言，缓冲区五镇居民大多愿意为黄山旅游发展献策献力，但是访谈到的所有居民都表示，景区做决策时较少听取社区居民意见，甚至根本没有相应的程序。

涉及社区参与的访谈发现，缓冲区各镇社区居民的旅游参与度各有不同，这在很大程度上与

黄山旅游发展对当地的辐射效用有关。例如汤口镇毗邻黄山南大门，受黄山风景区旅游发展影响最大，是黄山风景区最主要旅游生活服务和接待基地，劳动力 80%从事于旅游，除了为旅游企业打工外，镇上不乏个体私营业主。相比之下，其他镇由于距离和资源因素，黄山风景区对其带动作用不是很明显，村民从事旅游工作的机会相对少一些。

87.03%的社区居民渴望发展旅游，85.9%的人表示会继续支持黄山发展旅游。数据表明，黄山旅游推动了缓冲区五镇的发展，绝大多数居民愿意支持旅游发展，希望旅游发展能带来更多就业机会，促进基础设施的改善和居民生活水平的提高。

3.4.4 社区居民日常生活

54.8%的居民表示对生活环境感到满意，物价和医疗是缓冲区五镇居民目前面临的最大困难，不满意物价和医疗的居民分别占到 30.0%和 34.1%。数据显示，由于黄山本身的自然环境优势以及风景区管委会、各镇政府有效的环境保护措施，居民对其自身生活环境满意程度较高，但旅游发展也促使了物价水平的上涨以及就业压力增加等。

表 20 生活满意度

在黄山生活不满的方面	比例
对医疗不满	34.10%
对物价不满	30.00%
对就业不满	21.50%
对教育不满	12.60%
对居住条件不满	5.56%
对自然环境不满	5.56%

饮用水方面，汤口镇汤口村、谭家桥镇中墩新村、焦村镇的饮用水方面，居民反映存在自来水被污染或经常断水等问题。但总体而言，黄山风景区缓冲区五镇居民饮用水较为方便且在不断改善过程中，大部分居民认为饮用水没有困难，主要的抱怨还是集中在对水质的不放心上，如寨西村村民抱怨一些小企业会把污水排到江河里，使水源收到污染，居民们喝不上放心水；三口镇白果树村村民表示以前自来水存在断水现象，而且水质浑浊。

路灯方面，居民反映存在较大问题。对于街道两旁的路灯，大部分的居民表示没有路灯或者

路灯不亮。有些道路虽然装了路灯，但是时亮时不亮，并且长久没有相关工作人员来修理；又或者由于夜晚街道上行人、车辆稀少，为了省电，路灯不点亮；在寨西村的访谈得知，交通干道上主要服务游客和外来交通的路灯安装和运作状况良好，但两边与居民生活息息相关的小巷路灯设施却建设得马马虎虎，影响居民夜里在巷里活动，这种现象是寨西村作为旅游接待型社区的又一特色。

在家庭从业统计上，我们得到外出务工比例和旅游从业比例的情况如下两个图表所示，从图1我们看到，外出务工人员比例在20%之内的占了超过半数，比例越高频数越低，说明缓冲区居民大部分倾向于在本地就业，外出务工的较少。在旅游从业方面，有77个被访者表示自己的家庭没有人从事旅游相关的工作，占28.5%，其他家庭的情况大致如图2所示，旅游从业比例超过39.9%的频数总和121，占比45.7%。

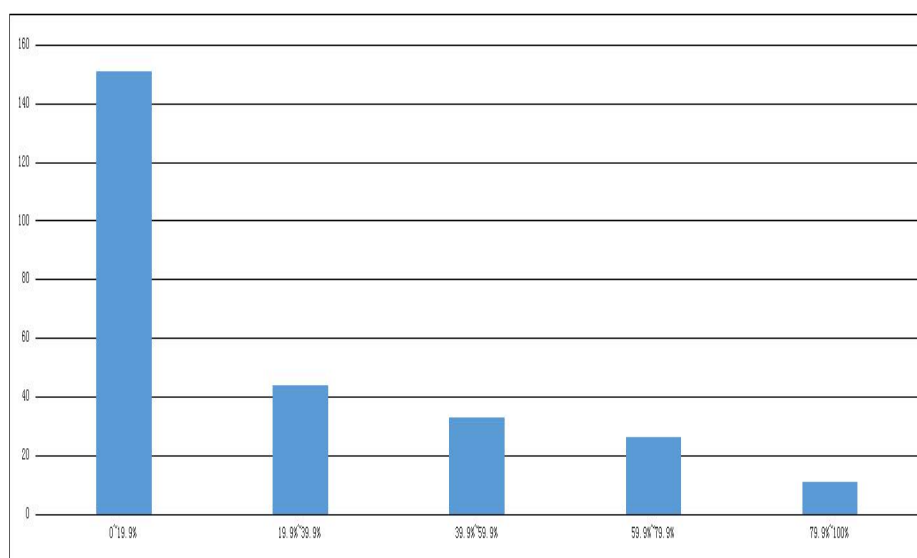


图 8 外出务工人数比例及对应频数

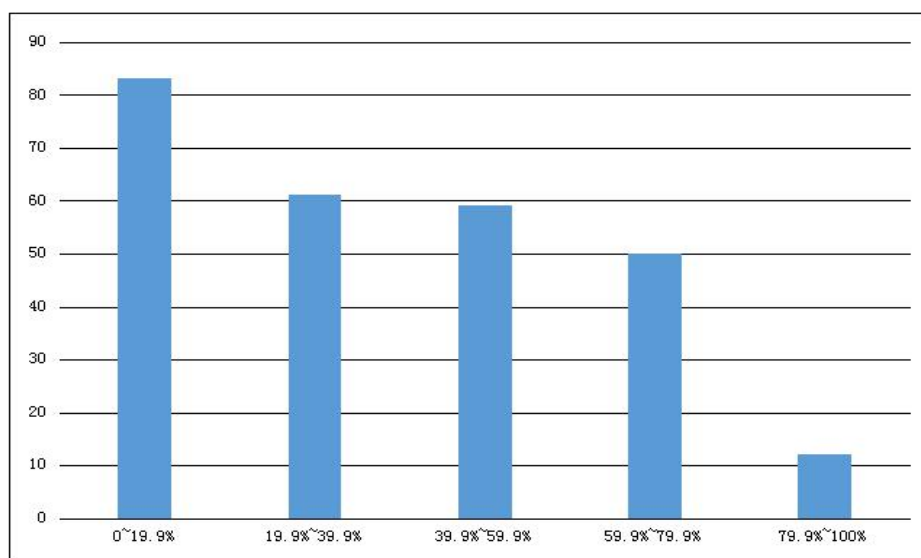


图 9 旅游相关从业人数比例及频数

3.4.5 小结

黄山缓冲区居民对黄山发展的满意度程度空间分布与旅游影响程度空间分布不完全匹配。如汤口镇受黄山旅游发展影响最大，但居民对黄山旅游发展满意程度最低，一方面是因为汤口镇居民对黄山旅游发展的期望值较高，另一方面与黄山南大门距离近也使得汤口镇居民承担了相对多的旅游发展带来的负面影响。

缓冲区居民对黄山旅游持支持态度，但旅游参与程度有待提高。访谈中大部分居民表达了自身对黄山旅游的支持并表示乐于为黄山发展献计献策，但缺乏完善的决策参与渠道，居民意愿不能得到很好的表达。

缓冲区的经济发展受黄山旅游发展带动，增加了当地就业机会，但是同时也带来了物价上涨、贫富差距拉大的问题。在就业方面表现为旅游相关从业人数总体比例上升，而随着旅游接待型社区转型过程的推进，社区居民也开始越来越关心物价上扬的问题。

黄山旅游发展对缓冲区环境形成污染，但也促进当地居民环保意识的提升。旅游的发展也引发了空气质量下降、垃圾增加、水体污染等环境问题，但也促进了当地居民环保意识的提升和政府相应环保措施的开展。居民普遍环保意识较强，愿意为了环境保护使用清洁能源。随着旅游的发展，当地居民的环保意识普遍提升，在对野生动植物保护、垃圾处理、新能源利用方面都展开了积极响应和尝试，但目前当地居民对环境保护方面的具体知识了解较少，在环境保护的实践方

面，仍需政府通过宣传教育等方式进行积极推动。

缓冲区多个村镇存在典型的旅游接待型社区的特征，旅游接待设施不断完善，转型过程中自身社区功能却被边缘化。如汤口镇寨西村，居民抱怨较多的问题包括面向社区设备方面，包括医疗设施不足、面向社区的路灯设施维护不力以及污水处理不妥影响社区生活环境等。

4 游客感知与满意度

4.1 游客监测指标

表 21 游客指标监测及结果

主题	指标	频率	相关部门	方式	本期监测结果
游客满意度水平	1. 游客对黄山资源、服务、整体旅游环境及其他方面的满意度水平	1 年	旅游办	本监测项目问卷抽样调查; 访谈	游客对黄山自然景观、文化体验及环境满意度高，但对天气气候满意度一般。在服务质量上评价较低，尤其是餐饮和纪念品。游客在旅游信息获取和解说系统上的满意度中等偏上。
	2. 游客总体满意度	1 年	旅游办	本监测项目问卷抽样调查;	总体满意度较高，超过 70% 游客认为此次旅行物有所值，超过 75% 的游客表示对此次旅游总体满意。
	3. 游客的重游率与推荐意愿	1 年	旅游办	本监测项目统计数据; 问卷抽	81.8% 的游客愿意向亲友推荐，认为黄山是一个值得游玩的目的地。有重游意向的游客也达到 69.1%。
	4. 黄山风景区游客投诉率	1 年	执法大队	本监测项目	共受理 39 起投诉
	5. 游客对黄山旅游的安全感知	1 年	旅游办	本监测项目问卷抽样调查。	69.1% 的游客表示对黄山的治安满意，但在“黄山的治安好所以吸引人”选项上仅有 55.9% 的游客表示认同。

游客研究专题	6. 游客对黄山风景名胜区的品牌形象感知	2 年	监测项目组	本监测项目	详看专题一。
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4.2 监测方法

本次黄山旅游可持续发展监测的游客调查由中山大学旅游学院 3 名硕士、11 名本科生以及澳大利亚 1 名留学生共同完成。调查时间为 2014 年 6 月 30 日到 7 月 7 日。调查的主要目的是了解黄山游客的满意度。调查主要采用问卷调查的方式来完成,辅以半结构访谈。本次调查的对象是已经游览完黄山并且准备离开的游客,问卷针对的是中国游客。

问卷针对游客满意度方面设计了 2 大类,分别是目的地的独特性以及游客的重游和推荐意愿,共计子项目 52 个;目的地的形象感知又分为自然景观、文化景观、对当地人的态度、旅游信息与设施建设、旅游服务、对环境及周边的影响、景区管理、遗产保护 8 大项目,36 个子项目。游客对于这些指标的评价采用里克特 5 级量表,分为“非常不满意”、“不满意”、“一般”、“满意”以及“非常满意”5 个等级,“非常不满意”得 1 分,“不满意”得 2 分,“一般”得 3 分,“满意”得 4 分,“非常满意”得 5 分,另外还增设一项“不清楚”。此外,对游客游览完的感受进行了测量,从 1 到 7 分 7 个等级描述“兴奋”“愉悦”“轻松”“激动”四种感受。问卷发放的地点为黄山风景区前山慈光阁游客中心。总共发放 466 份问卷,问卷当场回收,回收率为 100%。剔除无效问卷以后,有效问卷为 424 份,有效率为 91.0%。以下是问卷分析结果。

4.3 游客样本总体人口统计学特征分析

4.3.1 游客性别

被调查游客中完成性别的问卷有 422 份。其中 218 名男性,占总样本的 51.4%;女性 204 名,占总样本的 48.1%,男女比例较为协调。

表 22 游客样本总体性别构成

性别	频数	百分比
男	218	51.4%

女	204	48.1%
缺失值	2	0.5%
合计	424	100.0%

4.3.2 游客年龄

被调查游客中完成年龄的问卷有 422 份。年龄在 15-24 岁的游客最多，有 201 人，占总体的 47.4%；其次是 25-44 岁的游客，有 168 人，占总体的 39.6%；45-64 岁的游客有 49 人，占 11.6%；最少的为 65 岁以上的游客，有 4 人，仅占 0.9%。具体如图 2 所示。相比去年而言（44 岁以下比例及 24 岁以下比例均有增加），游客具有年轻化趋势。

表 23 游客年龄构成

年龄段（岁）	频数	百分比
15-24	201	47.4%
25-44	168	39.6%
45-64	49	11.6%
65 及以上	4	0.9%
缺失值	2	0.5%
合计	424	100.0%

4.3.3 游客文化水平

被调查游客中完成文化程度的问卷为 419 份。游客学历大多集中在高中或中专、大专及本科，其中本科学历人数最多，为 148 人，占 34.9%，与去年持平。其次为高中或中专，占总样本数的 19.8%。

表 24 游客文化水平构成

文化程度	频数	百分比
初中及以下	45	10.6%
高中或中专	106	25.0%

大专	84	19.8%
本科	148	34.9%
本科以上	36	8.5%
缺失值	5	1.2%
合计	424	100.0%

4.3.4 游客收入

被调查游客中完成文化程度的问卷为 419 份。游客收入在 1000 以下的游客最多，有 159 人，占 29.9%，这可能是由于调研对象的学生群体较多；其次是收入在 3001-5000 元的游客，有 100 人，占 23.6%；比例最低的是收入在 10000 元以上的游客，占 3.8%。5000 元以下收入的游客比例可以占到 82%，可见游客仍以中低层收入为主。

表 25 游客收入构成

收入（元）	频数	百分比
1000 元及以下	159	37.5%
1001-2000	20	4.7%
2001-3000	69	16.3%
3001-5000	100	23.6%
5001-10000	55	13.0%
10000 元以上	16	3.8%
缺失值	5	1.2%
合计	424	100.0%

4.3.5 游客职业

被调查游客中完成文化程度的问卷有 420 份。从表中可以看出学生游客最多，共 169 人，占 39.9%；其次为事业单位人员与企业职员，分别为 78 人与 73 人，占 18.4%以及 17.2%。

表 26 游客职业构成

职业类型	频数	百分比
学生	169	39.90%

事业单位人员	78	18.40%
企业职员	73	17.20%
个体工商	37	8.70%
其他	25	5.90%
公务员	21	5.00%
农民/工人	13	3.10%
离退休人员	4	0.90%
缺失值	4	0.90%
合计	424	100.00%

4.3.6 游客客源地

被调查游客中完成文化程度的问卷有 423 份,客源地主要以安徽省(34.9%),江苏省(13.7%)为主,山东、上海、浙江、湖北、河北次之。可以看出,客源地与地域空间有着密切关系,即安徽省以及距离安徽较近的省份的游客比例较大,同时反映出黄山风景区省内游相对旺盛。

表 27 游客客源地构成

省份	频数	百分比	省份	频数	百分比
安徽	148	34.9%	重庆	4	0.90%
江苏	58	13.70%	湖南	3	0.70%
山东	34	8.00%	北京	2	0.50%
上海	32	7.50%	甘肃	2	0.50%

浙江	19	4.50%	贵州	2	0.50%
湖北	17	4.00%	宁夏	2	0.50%
河北	15	3.50%	台湾	2	0.50%
广东	12	2.80%	天津	2	0.50%
江西	11	2.60%	云南	2	0.50%
山西	11	2.60%	吉林	1	0.20%
河南	10	2.40%	辽宁省	1	0.20%
黑龙江	9	2.10%	陕西省	1	0.20%
福建	8	1.90%	缺失值	1	0.2%
四川	8	1.90%	合计	424	100.0%
内蒙古	7	1.70%			

4.3.7 小结

综上所述,黄山风景区的游客以中青年游客为主,文化水平基本为本科水平。游客收入大多在 5000 元以下,中低收入群体较多,而这又受到游客职业的影响,尤其是学生群体比例较高(接近 40%)。从客源地看,游客大多来自本省或邻近省份,本省比例最高。

4.4 目的地独特性感知

4.4.1 目的地环境独特性感知

在环境的独特性方面,游客普遍认为黄山风景名胜及其环境整洁程度有着很大的优越性,游客认可度均超过了 80%,均值都在 4.2 以上;其次为山水文化,均值为 4.21,认可度 72.6%;居民的认可度较低,为 57.3%,均值 3.7,标准差也超过 1。

表 28 游客对当地环境独特性评价

评价项目	风景名胜 更加独特	环境更加整洁	山水文化更加 独特	休闲氛围更加 浓厚	居民更加友善 热情
均值	4.28	4.23	4.21	4.02	3.7
标准差	0.91	0.88	0.97	0.96	1.17
认同度	82.50%	82.30%	79.50%	72.60%	57.30%

4.4.2 旅游吸引物独特性评价

相比其他景区而言,黄山景区总体上具有较高独特性,均值为 4.1;认可度最高的为奇松怪石,达到了 92.7%,均值 4.57,标准差 0.73,可见游客普遍认同黄山的奇松怪石的独特性;自然景观(云海等)均值也达到了 4.44,仅次于奇松怪石,认可度为 86.3%。

此外,黄山风景区文化和旅游景点也得到了游客的可定,均值均为 4 左右,认可度超过 70%;相对而言,景区的治安认可度较低,仅 55.9%,均值 3.57。

表 29 游客对旅游吸引物独特性评价

评价项目	总体	奇松怪石 非常独特	自然景观(云海等)更壮观	中国山水文化的典范	体现“天人合一”思想	文化	旅游景点更多	治安
均值	4.1	4.57	4.44	4.35	4.19	4.02	3.96	3.57
标准差	0.97	0.73	0.89	0.79	0.95	1.04	1.05	1.2
认同度	76.20%	92.70%	86.30%	87.50%	80.90%	74.10%	70.80%	55.90%

4.5 游客重游和推荐意愿

游客的重游意愿和向他人推荐此景点的意愿也能够一定程度上反映游客对本次旅行的满意程度。根据样本统计分析可以看出,有 69.1%的游客表示会重游,81.8%的游客会向亲友推荐,87.5%的游客推荐黄山为向世界展现中国遗产的代表。这说明,大部分游客对黄山是非常认可的。

表 30 游客重游和推荐意愿

评价项目	我会再来黄山旅游的	我会向亲友们推荐黄山	我推荐黄山成为向世界展现中国遗产的代表
均值	3.91	4.26	4.49
标准差	1.34	1.06	0.87
认同度	69.1%	81.8%	87.5%

4.6 游客总体评价

游客根据游览体验给黄山印象总体打分,从 1 到 7 由非常认同到非常不认同进行评分,从下表可以看出,游客的心情基本是比较兴奋激动并且愉悦的,轻松程度相对来说低一些,访谈过程有不少游客表示整个登山过程是比较累的。

表 31 游客游览完心情与总体印象

态度	轻松	激动	愉悦	兴奋
均值	2.86	2.42	2.22	2.17
标准差	2.15	2.02	1.84	1.73

总体来说,游客对本次旅游比较满意(77.1%认可度,均值 4.04),认为是物有所值的游客较多,占 71.7%,均值 3.93。

表32 游客对黄山总体印象

评分项目	我感到在这里物有所值	我对本次旅游整体感到满意
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均值	3.93	4.04
标准差	1.11	1.02
认可度	71.7%	77.1%

4.7 小结

由以上分析可知,黄山风景区目前吸引的游客依然以省内及邻近省份为主,且中低收入群体占了较大比例;另外,学生群体(39.90%)最为主要,其次为事业单位人员(18.40%)和企业职员(17.20%),这也就意味着黄山游客中低收入群体比例较高,同时这也可能是游客文化水平较高的原因之一,调查显示游客中本科生(34.9%)比例最高。

在对目的地独特性感知上,游客对黄山自然风景和山水文化都给予了肯定,尤其是对黄山奇松怪石的评价很高,对黄山的环境和氛围也较为满意,但在黄山治安和对居民友好程度的感知上还有欠缺。

总体来说,游客对黄山较为满意(满意度 77.1%),并且游客普遍表示会向亲友推荐黄山(81.8%),大部分游客认为黄山是中国遗产向世界展现的优秀代表,但是重游率却不高(69.1%)。

5 旅游的经济影响

5.1 旅游经济影响指标监测

表 33 旅游的经济影响监测指标与监测结果

主题	指标	频	相关	方式	本期监测结果
旅游收入	1. 黄山风景区接待游客总人数	1 年	计统科	常规统计	黄山风景区 2013 年累计接待入山游客 2746457 人,同比下降了 8.7%;其中入境游的游客量为 162455 人,同比下降了 47.24%;2012 年门票收入约 49650.1 万元人民币,同比下降了 16.26%。

	2. 旅游统计数据（旅游总收入、床位数、过夜人数，人均花费等）	1 年	计统科、周边社区政府相关部门（目前只有汤口镇）	常规统计	2013 年，景区接待床位数为 3906 床，而在景区内过夜游客量达到 63.12 万人/天，人均花费（市旅游委抽样调查）1320 元。
	3. 周边低山景点接待游客人数	1 年	周边社区政府相关部门、区旅委	常规统计	本地调研获得数据显示耿城镇 2013 年全镇共接待游客 143.79 万人次；旅游人数 77577；谭家桥镇在 1-10 月份旅游接待 92.7 万人次；而作为低山旅游重点区域的汤口接待旅游人数达 423 万人数。
	4. 周边低山景点的旅游统计数据	1 年	周边社区相关政府部门、区旅委	常规统计	详见下表 5.2.3。
旅游的季节性程度	5. 旺月与淡月游客数量的比率	1 年	集团公司、计统科	本监测项目统计数据	3-11 月为旺季（共 9 个月）；在 12-2 月较少，为淡季（共 3 个月）。黄山风景区 2013 年旺季的游客总量占全年的 76.3%；接待游客最多的旺月（10 月）与接待人数最少的淡月（12 月）接待量的比率为 5.60

旅游对就业的影响	6. 旅游创造的就业机会	3 年	统计科	本监测项目：问卷调查；	本次调研可知，黄山旅游为周边低山景区带来了大量的就业机会，黄山风景区将山上的挑包、抬轿、小吃手工艺摊点等面向游客的经营活动承包给汤口旅游开发公司，然后分配到村民手中，具体各个村从事与旅游相关行业的情况如表 5.2.3.
游客花费构成	7. 游客花费中“吃住行游娱购”各部分的支出比例构成	1 年	监测项目组	本监测项目：问卷调查；统计数据	本期调研中较难获得数据，建议下期监测从统计数据间接了解。
旅游的经济带动作用	(专项研究)	3 年	监测项目组	专项研究	通过本小组成员深入黄山周边各个村镇进行调研，发现黄山旅游带动了周边经济的发展，提高了周边村镇的经济消费水平。黄山旅游发展带动基础设施发展，促进了当地商业发展，改变村镇面貌并带动了当地产业的发展。

资料来源：根据调查资料整理

5.2 概况

5.2.1 旅游收入

根据本期监测调研所获数据，黄山风景区 2013 年累计接待入山游客 2746457 人，同比下降了 8.7%；其中入境游的游客量为 162455 人，同比下降了 47.24%；2013 年门票收入约 49650.1 万元人民币，同比下降了 16.26%。情况不容乐观。

另外，监测数据也表明，进山的 274.65 万人中，选择从云谷寺、慈光阁、松谷庵进山的人

数分别为 144.81 万人、99.39 万人、30.45 万人，依次占比为 52.73%、36、19%、11.09%。2013 年，景区接待床位数为 3906 床，而在景区内过夜游客量达到 63.12 万人/天，人均花费（市旅游委抽样调查）1320 元。

5.2.2 旅游季节性程度

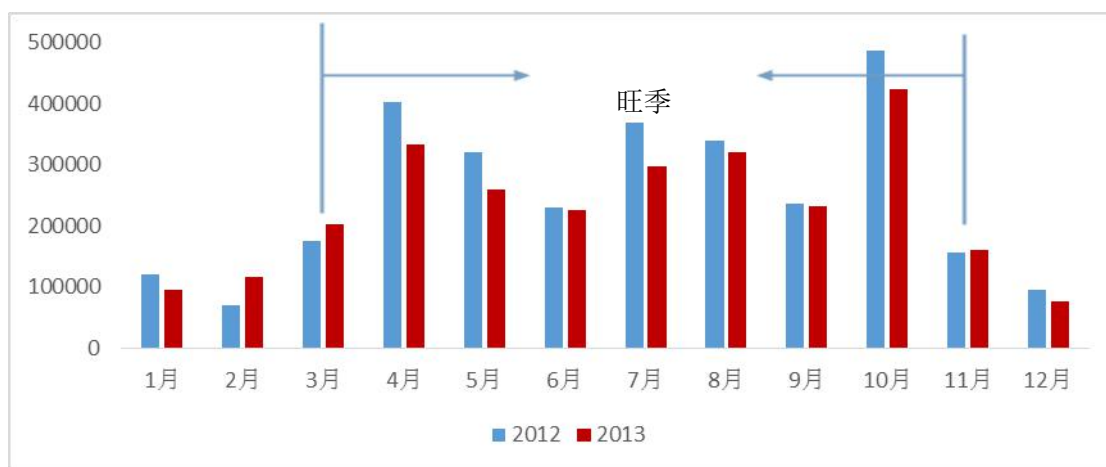


图 10 黄山风景区 2012-2013 年各个月份进山游客分布

资料来源：黄山旅游集团有限公司计统科

从上图可知，黄山风景区接待游客量存在季节性变化，旺季持续时间较长，游客数量在 3-11 月都保持较高的水平，为旺季（共 9 个月）；在 12-2 月较少，为淡季（共 3 个月）。黄山风景区 2013 年旺季的游客总量占全年的 76.3%；接待游客最多的旺月（10 月）与接待人数最少的淡季（12 月）接待量的比率为 5.60。

通过比较 2012 年和 2013 年的黄山风景区各个月份进山的游客量发现，两年的游客时间分布没有存在太大的差异，均呈现明显的季节性，3-11 月份为黄山旅游的旺季，而 12 月到次年 2 月为黄山旅游淡季，旺季游客量占黄山总体游客量的绝大部分比例。而比较可以发现，本年总体的游客量较上一年稍有下降的趋势，表现为淡季游客量稍有所增，如在 2、3、11 月份的游客量相对上一年略微有所上升，1、12 月份的游客量几乎与上一年持平，而旺季的游客量则表现出略微的下降趋势（见图 10）。总的来说，较去年游客量相比，稳定之中存在细微的变化。

5.2.3 旅游与就业

本次调研中，通过访谈可知，黄山旅游给周边低山景区带来了大量的就业机会。据了解，一方面，黄山风景区将山上的挑包、抬轿、小吃手工艺摊点等面向游客的经营活动承包给汤口旅游

开发公司，最终分配给村民，从而给村民带来了就业机会；另一方面，游客到各低山村镇进行消费给村民带来了诸多就业机会。

村民可以以下三种方式参与旅游行业：

参与到旅游开发公司，进行山上旅游商品经营或者旅游服务等工作；

选择到汤口或者寨西村旅游相关的店或者到店里做服务性工作；

自家开设农家乐或者旅游相关店面。

各个村具体从事与旅游相关行业的情况如表 34

表 34 周边低山村镇的旅游发展及旅游就业情况

村镇	发展旅游的情况	旅游与就业
耿城镇	2013 年全镇共接待游客 143.79 万人次，同比增长 11.3%，旅游总收入 51135.4 万元，同比增长 2.4%。其中芙蓉谷接待游客 70.25 万人次，同比下降 10.27%，虎林园接待人次 9.46 万人次，同比增长 4.48%	主要在旅游接待方面，住宿业和餐饮以农家乐为主，还有一些足疗洗浴点，超市几乎没有见到 农家乐共接待 63.93 万人次
谭家桥镇	旅游经济发展势头良好。1-10 月份旅游接待 92.7 万人次，同比增长 11.6%；旅游收入 4.63 亿元，同比增长 12.56%	主要从事与旅游相关的行业涉及到运输业、商饮业、旅游商品销售业以及服务业
汤口镇	到汤口各个低山景区旅游的人数达到 230.4 万人，旅游收入达到 8183.05 万元	汤口镇是黄山的南入口所在地，游客较多，主要从事旅游接待，包括社会宾旅馆、旅行社、农家乐、星级酒店，2013 年接待游客人数总计为 423 万人。
芳村	芳村旅游发展较为落后	有 60% 左右的村民现在在从事与旅游相关的工作，主要是在其他的一些旅游发展较好的村镇打工
冈村	冈村旅游发展尚处于开发阶段，接待能力有限，游客数量不多，仅在旅游旺季会有汤口接待剩余的游客；路过在此吃饭休息的游客；进行乡村游的驴友到此消费。	职业有一半以上与旅游相关，如当服务员、开旅行社、做导游、散客点促销，其中有 20 多人做导游
焦村	旅游人数 77577，旅游收入 620.62 万元（餐饮业为主，人均消费 80-90 元，亲子游较多），年总收入约 4.14 亿元（农业为主）。	农家乐数量统计主要由工商局负责，具体数量不明，镇政府所知有省三星级农家乐 3 家、省二星级 2 家、市二星级 1 家，2014 年有 1 家报批目前已歇业。选择从此入口上山的游客较少，下山游客多选择汤口、太平等地方住

		宿，游客停留时间短，一般为背包客之类，此地交通不方便
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资料来源：各村镇村委统计数据

黄山旅游为周边村镇带来的就业机会主要涉及到餐饮和住宿业（如农家乐、餐馆等）方面，分为自家经营（包括合营）和打工服务两大类。通过本小组成员观察和访谈，黄山周边村镇的餐饮与住宿业已经发展较为成熟。在质的方面，周边村镇（包括汤口、寨西以及一些离黄山较远的村镇）提供的餐饮（主要是当地特色美食）普遍比较卫生，店面规范而整洁，供应着当地各色美食，花样多样，覆盖了不同的消费层次；在量的方面，周边村镇的餐饮住宿方便且可达性高，竞争较为激烈。

黄山旅游业的良性发展以及游客的服务需求的多元化，又进一步为周边村镇带来了多样化的就业机会，如足浴、旅游商品销售，旅游商品代寄等。

总的来说，黄山旅游的“吃住行游购娱”六个方面所带来的就业机会均在周边低山村庄有所体现，黄山旅游发展有着极大的正面溢出效应，不仅促进了周边村镇经济的发展并且这种积极的影响趋势在逐渐开始扩展。

5.2.4 旅游的经济带动作用

通过本调研组的访谈与观察发现，黄山旅游带动了黄山周边交通运输业的发展，表现在：

公共交通设施的完善和服务水平的提升，周边居民对此反应良好；

促进了当地商业的发展。为了方便游客在山下购物，黄山在各村镇建设各类购物中心以及零售网点以及众多特色店（特色商品、特色餐饮等），直接促进了商业的发展，增加了村民的经济收入。

改善了村镇的面貌与风气。通过访谈可知，黄山旅游发展后，村镇开始积极完善各类基础设施，包括公路、垃圾处理点、绿化等，极大地提升了村民的生活水平。

为配合黄山旅游业的发展，周边村民建设了很多宾馆饭店，有利地推动了房地产业以及当地居民的就业情况的良性发展。

总体而言，黄山旅游发展，不仅增加了居民的收入，还促进了当地居民生活环境以及生活水平的改善，促进了黄山周边村落的城镇化，当然也促进了村民精神生活的提升。

6 组织与管理

6.1 科学保护资源与环境方面的成绩

黄山风景区的管理机构最早可追溯至“黄山建设委员会”。1931至1934年，原中华民国国务总理许世英，以“保护资源环境、发展旅游经济、光大风景名胜”为宗旨，发起设立“黄山建设委员会”，开创中国“国家公园”的管理模式。

1982年，黄山在中国风景区最早启动《总体规划》编制；1989年，安徽省人大常委会颁布《黄山风景名胜区管理条例》，这是中国风景区管理与保护的最早立法。

1998年，世界遗产委员会第22次特别会议称“黄山是一个杰出的景区，一个管理得很好的遗产地，一个有大量游客到访且管理优秀的亚洲示范景区”。建设部、国家文物局、中国联合国教科文组织全委会授予黄山风景区管委会“中国世界遗产地保护管理先进单位”称号。

1999年，黄山风景区管委会获得联合国教科文组织首批“文化与景观保护管理国际荣誉奖”，是亚洲首个获奖者。

2001年，黄山被国土资源部命名为“国家地质公园”。2004年，黄山成为联合国教科文组织首批“世界地质公园”网络成员。

2005年，委托清华大学修订编制《黄山风景区总体规划（2007-2025）》，提炼了可持续发展思想：（1）平衡科学保护与可持续发展；（2）注重公众教育与游客体验；（3）统筹景区内外有序发展；（4）展示特色性与文化性；（5）处理好理论前瞻性与现实操作性。

2006年末，黄山被国家环保总局评为“ISO14000国家示范区”。

2007年，黄山获国家重点风景名胜区管理办公室评选的“最佳资源保护的中国十大风景名胜”称号。

中华环保联合会、中国旅游景区协会授予黄山“全国低碳旅游示范区”。

2012年，黄山作为全球首个景区类试点目的地入选“全球可持续旅游目的地实验区”。

2013年，黄山被国家旅游局、环境保护部授予首批“国家生态旅游示范区”。

近年来，围绕遵循国际化导向、系统化战略、智慧化支撑，黄山风景区管委会（HSAC）强化精细化管理、人性化服务、体验化参与，并进行了系列探索：

(1) 推广“山上游、山下住”；合理确定景区日接待的最佳容量与最大容量；推广“冬游”产品，促进旅游季节性协调发展；实施产品线路管理，通过“三预”（预测/预约/预警）等机制，实现假日旅游的“削峰、调谷”。牵头制定了《景点封闭轮休规范》、《古树名木保护管理规范》等，这些标准成为省级标准，《景区游步道建设要求》、《景区环境保洁要求》等标准正在申报成为国家行业标准。开展了“阻击松材线虫病专项行动”，建立了 100 千米长、4 千米宽的“生物隔离带”。启动“黄山生物多样性保护”研究项目（该项目总投资 1300 万美元，涵盖了黄山全市 9800 多平方公里范围内的动、植物本底资源调查与研究）。

(2) 与国家各部委合作，先后启动“全国风景名胜区数字化示范基地”（中国风景名胜区协会/中国电子学会）、“全国旅游标准化试点单位”（国家旅游局）、“国家旅游气象服务示范区”（国家气象局）、“国家旅游安全应急救援黄山基地”（国家安监局/国家旅游局）等项目建设。

(3) 进一步完善黄山遗产博物馆、黄山地质博物馆、黄山书画研究院、黄山游客中心的教育功能，系统展示黄山自然与人文资源、可持续发展历程、景区管理方针与要求。

(4) 同 30 多家媒体保持友好伙伴关系，向公众广泛宣传可持续发展；与国家旅游局、中央电视台联合拍摄“品质旅游，伴你远行”公益广告；与全国 20 多家知名景区发表“绿色生活，低碳发展”黄山联合宣言。

(5) 与 20 多家知名高校以及科研机构深化合作关系：共同组建“南京大学旅游可持续发展研究暨南京大学博士后流动站黄山基地”、“中山大学黄山旅游研究基地”等；聘请知名专家担任黄山资源保护与环境管理“首席科学家”。

6.2 荣誉与社会认可

1979 年，中国国家领导人邓小平视察黄山并发表著名的“黄山谈话”，掀开中国旅游业改革开放的序幕，黄山因此成为中国旅游业改革开放的“发轫地”。

1982 年，国务院审定并公布安徽黄山为第一批“国家重点风景名胜区”。

1985 年，在《中国旅游报》组织的“中国十大风景名胜”评选中，黄山在 600 多个候选单位中脱颖而出，作为唯一的山岳景区入选“十大风景名胜”地。2007 年，黄山获国家重点风景名胜区管理办公室评选的“最受群众喜爱的中国十大风景名胜区”称号。

1990 年，黄山入选联合国教科文组织“世界文化与自然遗产”名录，成为全球第 17 处“混合遗产”地。

1996 年,“黄山旅游”B 股在上海证交所上市,次年 5 月发行 A 股。这是中国第一支“全要素旅游概念股”;2010 年,“黄山旅游”获得了中国“驰名商标”。

2005 年,黄山被《中国国家地理》及全国 30 家媒体评选为“中国最美十大名山”。

2007 年,国家人事部、国家旅游局授予黄山风景区管委会“全国旅游系统先进集体”称号。同年,黄山被全国旅游景区质量等级评定委员会评定为首批国家 5A 级旅游景区。

2010 年,黄山风景区管委会获得世界旅游业理事会“目的地管理奖”,是该奖的亚洲首个获奖者。同年,黄山旅游集团公司加入世界旅游业理事会,成为该组织在中国的第三家成员。

2010 年,黄山被评选为“长三角世博旅游主题体验之旅”示范点。同年,在携程旅游网等行业机构组织评选的“十大中国最佳旅游目的地”(城市/景区)中,黄山入选前三甲。

2011 年,在中华环保联合会、中国风景名胜区协会推荐下,黄山风景区管委会加入世界自然保护联盟,黄山成为该国际组织中的中国首个旅游景区暨首个遗产地。

2012 年,黄山旅游发展股份公司荣获首批“全国旅游标准化示范单位”。

2012 年,黄山地质公园工作得到教科文组织肯定。

2012 年,黄山风景区管委会荣获第十八届亚洲旅游业金旅奖。

2013 年,黄山获得首届亚太旅游协会(PATA)中国旅游社会责任最佳实践奖(旅游目的地类)。

6.3 国际交流与合作

黄山风景区管委会(HSAC)围绕着“肩负历史使命,保护好世界双重遗产地;抢抓时代机遇,建设好世界一流目的地”的目标,除了坚持绿色发展以外,还注重开放发展,加强国际交流合作。

黄山风景区先后与瑞士少女峰(2002 年)、美国约塞米蒂公园(2006 年)、希腊莱斯沃斯石化森林公园(2008 年)、新西兰凯库拉观鲸公司(2011 年)缔结了友好关系;2013 年,与加拿大班芙国家公园缔结为友好公园,另外黄山风景区也正在加快推进与美国黄石国家公园以及澳大利亚、俄罗斯、巴西等国家的知名公园与世界遗产地之间的联系。

2011 年,在亚太旅游协会(PATA)六十周年庆典大会上,黄山风景区管委会(HSAC)系统阐述“善行旅游”,即“友善的旅行与游览”的理念与内涵,被 PATA 宣传推广,并被 UNESCO 吸收借鉴和发展。2012 年,HSAC 与世界优秀目的地中心(CED)合作,以中国黄山为蓝本起草和拟定

《世界优秀目的地（景区）评价指标体系》（SMED-N）的基本框架。

2013 年，由全球可持续旅游委员会牵头制订的《全球可持续旅游目的地标准》（GSTC-D, 1.0）正式发布。黄山风景区管委会作为亚洲唯一代表参与该国际标准起草工作，并提供中文发布稿。未来，HSAC 将继续秉承“保护当头、发展为上，管理创新、和谐立山”这一职责与使命，稳步致力于“环境影响最小化、经济产出最大化、社会影响最优化、游览体验最佳化”四位一体的愿景与实践探索。

6.4 旅游营销方案

表 35 中列出了黄山 2011 年至 2013 年的黄山旅游营销方案，对比 2011 年至 2013 年的营销方案，三年间黄山旅游营销的两大主题和营销所针对的三大市场基本保持不变，全年进山人数的目标任务则是逐年增长，而具体的政策措施则及时根据旅游发展的外部环境和内部要求进行调整创新。比如，2011 年提出的后世博市场旅游热点转换契机；2012 年围绕国家旅游局确定的“中国欢乐健康游”宣传主题推出的“四季主题活动”；2013 年对高铁市场、自驾游市场的关注。

表 35 黄山旅游营销方案

	营销方案
2011 年	“一个目标”：2011 年进山人数 260 万 “两大主题”：国内市场“登黄山，天下无山”；境外市场“中国黄山，人间仙境” “三大市场”：传统市场、新兴市场、入境市场 “四个重点”：航空旅游包机和专列、网络销售、分社拓展、后世博市场旅游热点转换契机 “五个结合”：“新老”、“内外”、“远近”、“长短”、“大小”结合
2012 年	“一个目标”：2012 年 280 万进山人数的目标任务 “两大主题”：国内市场“天地之美，美在黄山”；境外市场“中国黄山，人间仙境” “三大区域”：境内主打市场、境内主攻市场、境外主拓市场 “四季主题活动”：春漫黄山，欢乐踏青；夏临黄山，避暑休闲；秋赏黄山，寻谷探幽；冬游黄山，人间仙境

	“五个转变思路” “六项重点工作”：巩固提升旅游三进、全面深化网络营销、积极促进航班专列、稳步实施分社拓展、抓好特定时段促销、大力开展整体联动
2013 年	“一个目标”：2013 年 310 万进山人数的目标任务 “两大主题”：境内市场为“感受黄山，天下无山”；境外市场为“中国黄山，人间仙境” “三大市场”：传统市场、新兴市场、境外市场 “七项措施” 五项“新政策”：自驾游引导、大型会议团队优惠、俄罗斯市场促进、定额抵扣消费、西海观光缆车价格政策

资料来源：黄山旅游发展股份有限公司营销中心

6.5 景区与社区交流

2010 年以来，黄山风景区管委会与周边乡镇互派干部，进行持续三个月或两年的挂职，以促进双方的沟通与合作。2010 年 2 月至 2014 年 3 月，黄山风景区管委会共选派科级干部、机关干部 5 人次到周边村任职。2011 年、2012 年共互派干部 13 人次，2011 年 9 月至 11 月，选派 3 名风景区管委会科级干部至周边乡镇挂职谭家桥镇镇长助理、焦村镇镇长助理、黄山区城市管理行政执法局汤口分局副局长等，接收 3 名黄山区乡镇干部挂职，分别挂任黄山风景区管委会综合执法局紧急救援大队副大队长、黄山风景区管委会规划土地处规划管理办公室副主任、黄山风景区交通局副局长等；2012 年 9 月至 11 月，选派 3 名人员到周边乡镇挂职，分别担任三口镇镇长助理、耿城镇镇长助理、焦村镇镇长助理，接收 4 名黄山区乡镇干部至黄山风景区管委会挂职，分别担任黄山旅游集团有限公司投资部项目经理、黄山风景区管委会政治处办公室主任助理、黄山风景区管委会园林局芙蓉管理区主任助理、黄山风景区管委会经济发展局旅游事业管理办公室主任助理。

7 结论与建议

7.1 进一步提升游客体验

黄山风景区在提升游客满意度方面进行了不懈的努力且卓有成效，但游客评价也反映出，在

部分领域黄山风景区仍需持续努力，进一步提升游客体验。

本期监测结果显示，黄山风景区目前吸引的游客依然以省内及邻近省份为主，且中低收入群体占了较大比例；另外，学生群体最为主要，这也就意味着黄山游客中低收入群体比例较高，同时这也可能是游客文化水平较高的原因之一。

在对目的地独特性感知上，游客对黄山自然风景和山水文化都给予了肯定，尤其是对黄山奇松怪石的评价很高，对黄山的环境和氛围也较为满意，但在黄山治安和对居民友好程度的感知上还有欠缺。

游客对黄山较为满意，并且游客普遍表示会向亲友推荐黄山，但是重游率却不高。

7.2 协调统筹周边社区共同发展

社区参与是统筹社区共同发展的有效路径，黄山风景区与周边社区紧密相连，在黄山风景区旅游发展过程中，不能仅重视核心景区的发展，而忽视周边社区的可持续发展。本次监测从经济、社会、文化、环境、居民态度等多方面对汤口、谭家桥、耿城、焦村等受黄山旅游发展的影响情况进行了分析对比，为今后增加社区参与提供依据，专题二中对缓冲区中小企业的探讨，也为周边社区参与黄山风景区旅游发展提供了成功的借鉴模式。

本次调研结果显示，黄山周边其他社区由于不同的地理位置、交通条件等客观原因，其受黄山风景区旅游发展的辐射影响程度也有所差异，汤口镇优越的地理位置使得其旅游发展程度最高，受到黄山旅游发展的影响最大，包括就业机会增加、收入增多、基础设施、住房改善等正面影响，而受旅游的负面影响如经济方面物价增高、贫富差距扩大，环境方面垃圾增多、污染加重等也最大。因此，黄山缓冲区居民对黄山发展的满意度程度空间分布与旅游影响程度空间分布不完全匹配。如汤口镇受黄山旅游发展影响最大，但居民对黄山旅游发展满意程度最低，一方面是因为汤口镇居民对黄山旅游发展的期望值较高，另一方面与黄山南大门距离近也使得汤口镇居民承担了相对多的旅游发展带来的负面影响。

绝大多数居民认识到旅游发展带来的积极作用，愿意支持旅游发展，也表示愿意为景区的发展出谋划策，但目前对于大多数居民而言，其对于景区的开发、发展并没有太多发言权，参与方式较为单一。缓冲区居民对黄山旅游持支持态度，但旅游参与程度有待提高。大部分居民表达了自身对黄山旅游的支持并表示乐于为黄山发展献计献策，但缺乏完善的决策参与渠道，居民意愿不能得到很好的表达。

黄山旅游发展对缓冲区环境形成污染，但也促进当地居民环保意识的提升。旅游的发展也引发了空气质量下降、垃圾增加、水体污染等环境问题，但也促进了当地居民环保意识的提升和政府相应环保措施的开展。居民普遍环保意识较强，愿意为了环境保护使用清洁能源。随着旅游的发展，当地居民的环保意识普遍提升，在对野生动植物保护、垃圾处理、新能源利用方面都展开了积极响应和尝试，但目前当地居民对环境保护方面的具体知识了解较少，在环境保护的实践方面，仍需政府通过宣传教育等方式进行积极推动。

总体而言，缓冲区多个村镇存在典型的旅游接待型社区的特征，旅游接待设施不断完善，转型过程中自身社区功能却被边缘化。如汤口镇寨西村，居民抱怨较多的问题包括面向社区设备方面，包括医疗设施不足、面向社区的路灯设施维护不力以及污水处理不妥影响社区生活环境等。

7.3 增强对黄山品牌的宣传

作为中国旅游目的地暨风景名胜区改革开放的“发轫地”，黄山一直在努力建设其目的地品牌。根据现有的“黄山品牌”，主要包括以下六方面：使命、愿景、精神、目标定位、发展模式以及品牌形象。从品牌的描述中可以发现，这里的“黄山品牌”更多的是指向内部的管理，而非外部的市场。一个品牌的建立当然要从内部开始，将组织规范化，并且形成巩固的组织文化，但是这种品牌的建立最终是要指向外部市场的，通过品牌形象的建立，让品牌发挥其最大的效益。然而黄山风景区在品牌的建立仍处于比较初步的阶段，强调了其内部的管理，却忽视了市场顾客群体，未能将品牌的概念进行输出，品牌的传递及其能效收到了阻碍。因此，在之后的黄山品牌建立过程中，对组织的内部管理仍要继续，树立员工的品牌意识，而同时，更重要的是加强对黄山品牌的营销，让其外部的品牌形象更加鲜明，让顾客接受到品牌传输的价值，从而让黄山品牌能够真正立足于旅游目的地的竞争之中，并且成为良好的范例。

目前，黄山品牌最突出的一个部分是其自然风光。黄山自古以来就是中国名山，其自然资源条件十分优越。因此，黄山在其品牌建设中更应该注重这一个部分，充分发挥其优势。但是黄山不仅是一个风景名胜区，更是一座文化名山，它代表着很多中国的传统文化。但是，现在很多居民并不清楚黄山的文化意义，绝大多数游客也并不知道黄山游的文化内涵。因此，黄山在品牌建设过程中，更应该注重文化传播这一部分，努力让大家知道并且认可“文化名山”这个称号。

7.4 增强中小企业社会责任

在产品服务的供给上，中小企业以传统餐饮为主，产品雷同。对于新产品和服务的追求，黄山周边中小企业无论是在社会责任上还是在品牌创建上的意识都相对薄弱，当地抄袭模仿现象严重，商家不愿投入时间金钱在商品和服务的创新上，商品服务的同质化不断加重，不利于品牌意识的建立。

在环境的保护上，黄山周边中过半数中小企业涉及住宿，餐饮等对环境有较大影响的行业，大多数中小企业有意识遵守环境法规和标准，但是在政府没有强制监督的项目方面，中小企业人员的重视程度都相对有所降低。

在员工待遇上，黄山周边中小企业有着良好的意识。他们及时发放合理工资、女性工作平等、兼顾家庭等方面，同时，黄山中小企业的员工性别协调，因此相信大部分企业不仅在意识上追求女性工作平等，也确实给了女性平等工作的机会。

在黄山市总体旅游发展的关注上，中小企业成员表示自己对市总体旅游发展重视程度一般。尽管中小企业大部分成员都是黄山市本地人，而且他们也意识到自身企业发展十分依赖黄山的总体旅游发展，但是他们仍是在追求自身利益的最大化，对于黄山市总体旅游发展重视程度一般去，缺乏从大局上考虑自身发展和社会责任的关系的意识。

在持续经营上，中小企业虽然不满但仍愿意持续经营。虽然过半的中小企业对于目前的状况不满，但是更多的中小企业愿意经营下去，这说明中小企业的对黄山未来的发展仍充满憧憬。

7.5 灵活导游激励制度

受访导游认为近几年来黄山旅游发展总体呈上升趋势，资源保护卓有成效、基础设施及旅游配套服务设施比较完善，但景区员工服务素质有待提高。近些年导游的社会形象受到重创，工资待遇差，生存状态堪忧。整个导游职业呈现高流动率的态势。

根据导游评价，导游对黄山景区对安排导游排队方面予以“方便”不足，为了更好方便导游安排团客，可考虑导游通道。

8. 专题研究

专题一 黄山品牌形象感知

1 背景

随着市场竞争的加剧,越来越多的公司和组织开始认识到,最有价值的资产之一是与各种产品和服务相联系的品牌。强势品牌的价值无限,它可以简化顾客决策,减少风险和形成期望²。和其他消费品一样,旅游目的地也必须寻求品牌化来定位及区别自己,以及向旅游者传达积极的和鼓动性的信息³。随着旅游目的地的日益趋同,可替代性以及竞争的加剧,品牌化也许是当代旅游目的地营销人员最强有力的市场开发武器⁴。未来旅游目的地对旅游者的竞争不再是基于价格,而是基于旅游者的人心和情感⁵。黄山作为中国典型的旅游目的地,其品牌化是个十分值得研究的课题。

由于在目的地的领域的品牌化问题的研究才刚刚开始,所以对于目的地品牌化概念的研究还不成熟,每一位研究者或者从各自的研究领域出发对目的地品牌进行概念界定,或者直接借用品牌的概念,在研究领域缺少一致性。布雷恩等(Blainetal)给出的旅游目的地品牌化概念是目前被广泛接受的一个定义。他认为旅游目的地品牌化是一系列市场营销活动的集合,即通过创建名称、标志、徽标、文字标识或者其他图表,以识别和区分旅游目的地;始终如一的传递与旅游目的地相连的令人难忘的旅游经历的预期;巩固和强化旅游目的地与旅游者之间的情感联系;减少旅游者的搜寻成本,降低风险⁶。

² Kevin Lane Keller. Strategic Brand Management: Building,Measuring,and Managing Brand Equity[M]. N J: Prentice-Hall, 2003.1-51.

³ Aaker D A. Managing Brand Equity[M]. New York: Free Press, 1991.1-41.

⁴ Nigel Morgan, Annette Pritchard, Rachel Piggott. New Zealand,100% pure. The creation of a powerful niche destination brand [J].Journal of Brand Management, 2002,9(4):335-354.

⁵ Morgan N, Pritchard A, Piggott R. New Zealand, 100% pure: The creation of a powerful niche destination brand[J]. Brand Management,2002,9(4/5):335-354.

⁶ Blain C, Levy S E, Ritchie J R B. Destination branding: insights and practises from destination management organizations [J]. Journal of Travel Research, 2005,43:328-338.

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2 调研过程

本次黄山旅游可持续发展监测的游客调查由中山大学旅游学院 3 名硕士、11 名本科生以及澳大利亚 1 名留学生共同完成。调查时间为 2014 年 6 月 30 日到 7 月 7 日。调查主要采用问卷调查的方式来完成，本次问卷的对象是已经游览完黄山并且准备离开的游客，以及居住在黄山当地的居民。

根据目的地品牌影响因素模型相关文献、监测成果等，结合黄山本身的特点，制定目的地品牌形象感知量表，黄山品牌形象感知的问卷主体可以分成三个部分，分别是认知形象、特有形象和情感形象，每个部分包括了不同的因子，认知形象包括了体验质量、旅游吸引物、环境与基础设施、娱乐活动和文化传统；特有形象包括了本土文化与环境、目的地吸引力和旅游吸引物；情感形象包括了兴奋度、愉悦度、轻松度和激动度四个维度，共计子项目 51 个。

对于这些指标的评价采用里克特 5 级量表，分为“非常不满意”、“不满意”、“一般”、“满意”以及“非常满意”5 个等级，“非常不满意”得 1 分，“不满意”得 2 分，“一般”得 3 分，“满意”得 4 分，“非常满意”得 5 分，另外还增设一项“不清楚”。此外，对游客游览完的感受进行了测量，从 1 到 7 分 7 个等级描述“兴奋”“愉悦”“轻松”“激动”四种感受。游客问卷发放的地点为黄山风景区前山慈光阁游客中心，总共发放 466 份问卷，问卷当场回收，回收率为 100%，剔除无效问卷以后，有效问卷为 424 份。居民品牌感知研究共回收 91 份有效问卷。

3 目的地品牌形象分析

3.1 样本人口统计学特征分析

被调查游客中，有 218 名男性，占总样本的 51.4%；女性 204 名，占总样本的 48.1%，男女比例较为协调。游客年龄方面，年龄在 15-24 岁的游客最多，有 201 人，占总体的 47.4%；其次是 25-44 岁的游客，有 168 人，占总体的 39.6%；45-64 岁的游客有 49 人，占 11.6%；最少的为 65 岁以上的游客，有 4 人，占 0.9%。游客学历方面，游客学历大多集中在高中或中专、大专及本科，其中本科学历人数最多，为 148 人，占 34.9%。其次为高中或中专，占总样本数的 19.8%。游客收入方面，收入在 1000 以下的游客最多，有 159 人，占 29.9%，这可能是由于调研对象的学生群体较多；其次是收入在 3001-5000 元的游客，有 100 人，占 23.6%；比例最低的是收入在 10000 元以上的游客，占 3.8%。5000 元以下收入的游客比例可以占到 82%，可见游客仍以中低收入为主。游客职业方面，学生游客最多，共 169 人，占 39.9%；其次为事业单位人员与企业职员，分别为 78 人与 73 人，占 18.4%以及 17.2%。在客源地方面，客源地主要以安徽省（34.9%），江苏省（13.7%）为主，山东、上海、浙江、湖北、河北次之。可以看出，客源地与地域空间有着密切关系，即安徽省以及距离安徽较近的省份的游客比例较大，同时反映出黄山风景区省内游相对旺盛。

综上所述，黄山风景区被调查的游客以中青年游客为主，文化水平基本为本科水平。游客收入大多在 5000 元以下，中低收入群体较多，而这又受到游客职业的影响，尤其是学生群体比例较高（接近 40%）。从客源地看，游客大多来自本省或邻近省份，本省比例最高。

3.2 目的地认知形象

3.2.1 游客感知的认知形象

游客对黄山品牌的“体验质量”认知程度最高，其后依次为“环境与基础设施”、“文化传统”，而游客对“娱乐活动”认知程度最弱。游客对黄山目的地形象认知情况的各项指标详见表 36。

表 36 游客认知形象统计表

因子	子项	均值	标准差	不清楚	非常反	反对	中立	赞成	非常赞
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					对				成
				单位：%					
体验质量	到达景区很方便	3.90	1.037	0.47	3.54	8.02	13.68	44.1	30.19
	景区内提供方便的交通	3.84	0.989	0.47	2.12	9.2	17.22	44.58	26.42
	住宿餐饮价格合理	3.94	1.072	0.47	4.48	4.95	18.4	35.85	35.85
	拥有休闲气氛	2.83	1.293	5.42	18.16	21.46	25.94	16.51	12.5
	自然风光优美	4.74	0.597	0.24	0.71	0.71	1.89	16.75	79.72
	有很宽敞的空间	4.25	0.941	0.47	1.89	3.3	13.44	30.42	50.47
	有很友善的当地居民	3.96	0.974	5.42	2.12	4.25	21.46	34.67	32.08
	导游的服务质量高	3.91	1.021	6.84	3.3	4.25	20.28	34.67	30.66
	是风景名胜区的管理典范	4.14	0.918	3.07	1.42	2.59	18.63	32.55	41.75
	管理措施不断推陈出新	3.93	0.944	17.69	0.94	5.19	18.4	31.84	25.94
	旅游发展注重环境保护	4.22	0.849	4.48	0.94	2.12	14.15	36.32	41.98
	遗产保护很到位	4.32	0.825	4.01	0.94	1.65	11.56	33.49	48.35
	黄山旅游有利于周边社区的发展	4.43	0.794	3.07	0.94	1.42	8.73	29.72	56.13
	黄山旅游对自然环境影响很小	3.73	1.109	3.77	3.54	10.14	24.06	29.72	28.77

	黄山旅游有利于遗产保护	3.92	1.037	2.59	2.59	7.31	18.63	35.14	33.73
	因子均值	4.00							
旅游吸引物	黄山当地的菜肴很吸引人	3.20	1.149	7.55	8.25	15.09	32.78	22.64	13.68
	黄山对于家庭旅游有很大吸引力	4.03	0.948	1.65	1.89	3.54	20.52	35.85	36.56
	黄山的天气气候很吸引人	3.65	1.214	0.24	8.25	9.67	18.4	35.85	27.59
	黄山的纪念品很吸引人	2.91	1.015	6.13	7.31	23.35	41.27	14.39	7.55
	因子均值	3.45							
环境与基础设施	黄山拥有整洁且未破坏的环境	4.02	0.904	1.18	0.71	5.66	18.16	40.8	33.49
	黄山的基础设施很好	3.97	0.818	0.94	0.47	4.01	19.81	48.58	26.18
	能方便得到黄山的旅行信息	3.95	0.920	1.42	1.18	5.9	19.58	42.22	29.72
	能方便得到景区的地图和宣传册	3.58	1.135	2.59	4.48	13.68	24.06	31.6	23.58
	景区内部的解说牌清晰明了	3.75	1.010	2.12	2.36	9.67	21.93	40.09	23.82
	景区内的人工设施和自然环境很协调	4.02	0.874	2.36	1.18	3.77	17.69	43.87	31.13
	游览黄山使	4.58	2.801	0.71	0.47	2.12	8.49	34.2	53.54

	我更加了解中国山水文化								
	黄山的游览对我来说很有教育意义	4.17	0.841	0.71	0.94	1.89	16.75	39.62	40.09
	黄山景区很重视它的教育作用	3.91	0.904	4.95	1.18	3.54	25.94	36.79	27.59
	黄山地区治安很好	3.98	0.895	5.9	0.94	3.3	22.88	36.32	30.66
	因子均值	3.99							
娱乐活动	在黄山有丰富的活动	3.51	1.041	17.45	29.72	29.25	12.03	2.83	8.73
	在游览中与当地人接触较多	3.31	1.128	16.75	24.06	31.6	16.98	5.42	5.19
	因子均值	3.41							
文化传统	黄山拥有当地的文化传统	3.80	1.004	25.94	35.14	22.17	8.73	1.65	6.37
	能体验到黄山茶道文化习俗	3.40	1.178	19.1	25.94	28.07	12.97	7.08	6.84
	黄山是我们的精神家园	3.91	1.014	33.02	32.31	22.17	6.84	1.89	3.77
	因子均值	3.70							

游客对“旅游质量”的认同度最高，均值为 4.00，其中游客对黄山的自然风光认同度很高，认同度达到了 96.7%，且标准差较小，表明游客基本一致认同黄山自然风光；仅有 71.7% 的游客认为景区营造了休闲的气氛。其它游客比较认同的依次有“是风景名胜区的管理典范”、“黄山旅游有利于周边社区的发展”、“遗产保护很到位”、“旅游发展注重环境保护”。

其次是“环境与基础设施”，均值为 3.99，其中“游览黄山使我更加了解中国山水文化”一

项最高达到了均值 4.58，依次有“黄山的游览对我来说很有教育意义”、“黄山拥有整洁且未破坏的环境”、“景区内的人工设施和自然环境很协调”。

在文化上，游客还是比较认可黄山的文化传统的，其中，有 88.2% 的游客认为游览黄山使得他们更加了解中国山水文化，但其标准差很大，达到了 2.81，可见有少部分游客持有较大反对意见。涉及到具体的一些项目，游客满意度降低，如茶道文化的满意度不足 50%，均值也降到了 4 分以下。

3.2.2 居民感知的认知形象

居民对黄山品牌的“文化传统”认知程度最高，其后依次为“体验质量”、“环境与基础设施”、“旅游吸引物”，而居民对“娱乐活动”认知程度最弱。居民对黄山目的地形象认知情况的各项指标详见表 37。

表 37 居民认知形象统计表

因子	子项	平均值	标准差	不清楚	非常反对	反对	中立	赞成	非常赞成
				单位：%					
体验质量	到达景区很方便	4.12	.941	0	1.1	8.8	5.5	46.2	38.5
	景区内提供方便的交通	3.74	1.182	4.4	0	6.6	22.0	40.7	26.4
	住宿餐饮价格合理	4.11	1.130	1.1	1.1	9.9	11.0	27.5	49.5
	拥有休闲气氛	3.76	1.109	0	4.4	7.7	26.4	30.8	30.8
	自然风光优美	4.87	0.476	0	0	1.1	2.2	5.5	91.2
	有很宽敞的空间	4.10	1.076	0	4.4	5.5	9.9	36.3	44.0
	有很友善的当地居民	4.33	.844	0	0	4.4	11.0	31.9	52.7
	导游的服务质量高	3.75	1.170	2.2	3.3	6.6	22.0	37.4	28.6
	是风景名胜区的管理典范	4.13	1.002	1.1	1.1	2.2	19.8	30.8	45.1
	管理措施不断推陈出新	3.75	1.207	3.3	4.4	2.2	22.0	40.7	27.5

	旅游发展注重环境保护	3.73	1.146	3.3	1.1	6.6	23.1	40.7	25.3
	遗产保护很到位	4.00	1.116	2.2	2.2	2.2	19.8	34.1	39.6
	黄山旅游有利于周边社区的发展	3.99	1.169	1.1	5.5	3.3	14.3	35.2	40.7
	黄山旅游对自然环境影响很小	3.55	1.167	2.2	4.4	8.8	25.3	39.6	19.8
	黄山旅游有利于遗产保护	4.01	1.070	2.2	1.1	2.2	20.9	35.2	38.5
	因子均值	4.00							
旅游吸引物	黄山当地的菜肴很吸引人	4.01	0.994	0	2.2	3.3	25.3	29.7	39.6
	黄山对于家庭旅游有很大吸引力	4.09	0.985	0	2.2	5.5	14.3	37.4	40.7
	黄山的天气气候很吸引人	3.90	1.146	1.1	2.2	8.8	19.8	29.7	38.5
	黄山的纪念品很吸引人	3.34	1.147	0	7.7	13.2	34.1	27.5	17.6
	因子均值	3.84							
环境与基础设施	黄山拥有整洁且未破坏的环境	3.74	1.094	0	3.3	12.1	19.8	37.4	27.5
	黄山的基础设施很好	3.79	1.070	1.1	1.1	8.8	25.3	34.1	29.7
	能方便得到黄山的旅行信息	4.24	0.874	0	1.1	2.2	15.4	34.1	47.3
	能方便得到景区的地图和宣传册	3.76	1.078	2.2	2.2	6.6	17.6	49.5	22.0
	景区内部的解说牌清晰明了	3.80	1.077	3.3	0	6.6	16.5	50.5	23.1
	景区内的人工设施和自然环境很协调	3.96	0.977	1.1	0	5.5	22.0	38.5	33.0
	游览黄山使我更	4.27	0.978	2.2	0	2.2	8.8	37.4	49.5

	加了解中国山水文化								
	黄山的游览对我来说很有教育意义	4.01	1.027	2.2	0	2.2	23.1	35.2	37.4
	黄山景区很重视它的教育作用	3.74	1.210	2.2	2.2	9.9	24.2	28.6	33.0
	黄山地区治安很好	4.42	0.817	0	0	3.3	11.0	26.4	59.3
	因子均值	3.97							
娱乐活动	在黄山有丰富多彩的活动	3.45	1.223	2.2	4.4	12.1	31.9	26.4	23.1
	在游览中与当地人接触较多	3.87	0.957	0	2.2	5.5	23.1	41.8	27.5
	因子均值	3.66							
文化传统	黄山拥有当地的传统文化	4.11	1.069	2.2	1.1	2.2	16.5	34.1	44.0
	能体验到黄山茶道文化习俗	4.04	1.192	1.1	4.4	4.4	17.6	24.2	48.4
	黄山是我们的精神家园	4.24	0.821	0	0	3.3	14.3	37.4	45.1
	因子均值	4.13							

居民对黄山文化传统认知程度最高，其因子均值为 4.13，说明社区居民对黄山的文化传统感知较为强烈，对其认同程度也较高。在“文化传统”这一维度中，“黄山是我们的精神家园”这一子项均值最高，标准差最小。这也就说明大多数黄山社区居民都把黄山作为他们精神生活的一部分，黄山对于他们来讲有着十分重要的精神意义。

居民对黄山体验价值认知程度位于其次，说明大部分居民认为黄山作为一个旅游目的地的体验价值较高。在体验价值这一维度中，“自然风光优美”这一子项平均值最高，这也是整个居民目的地形象认知量表中均值最高的一项。96.7%的居民赞成“黄山自然风光优美”这一说法，说明黄山风景优美这一品牌优势已经深入人心。而“黄山旅游对自然环境影响很小”这一子项均值最低，为 3.55，说明很多居民已经明显感知到黄山旅游对自然环境的影响。

因子均值数值大小位于第三的是环境和基础设施这一维度。其中,“黄山地区治安很好”这一子项均值最大,数值为 4.42。这说明黄山大多数居民对当地治安情况较为满意。而均值最小的则有两项,数值为 3.74,分别是“黄山拥有整洁而未破坏的环境”和“黄山重视它的教育作用”。

因子均值数值大小位于第四的是旅游吸引力这一维度。其中,“黄山对于家庭旅游有很大吸引力”这一子项均值最大,有 78.1%的居民赞成这一说法。而“黄山的纪念品很吸引人”这一子项均值最小,说明居民对黄山纪念品吸引力的认同程度比较弱。黄山在建设目的地品牌的过程中,应该注意到纪念品这一个部分,努力开发能够体现目的地特色并且吸引力较强你的纪念品。

居民对目的地娱乐活动这一维度的认知程度最弱,说明多数居民不认为黄山有丰富多彩的娱乐活动。因此,黄山在建设品牌的过程中,应该充分挖掘当地的民俗风情特色,丰富其他一些娱乐活动。

3.3 目的地特有形象

3.3.1 游客感知的特有形象

目的地特有形象是指一个目的地区别于其他地方的所有点的总和,它是目的地品牌塑造的重要部分。如表 38 所示,游客认为黄山的旅游吸引物与其它景区相比最独特,均值达到了 4.33。黄山景区总体上具有较高独特性,均值为 4.1;认可度最高的为奇松怪石,达到了 92.7%,均值 4.57,标准差 0.73,可见游客普遍认同黄山的奇松怪石的独特性;自然景观(云海等)均值也达到了 4.44,仅次于奇松怪石,认可度为 86.3%。

在本土文化与环境方面,游客普遍认为黄山风景名胜及其环境整洁程度有着很大的优越性,游客认可度均超过了 80%,均值都在 4.2 以上;其次为山水文化,均值为 4.21,认可度 72.6%;居民的认可度较低,为 57.3%,均值 3.7,标准差也超过 1。此外,黄山风景区文化和旅游景点也得到了游客的可定,均值均为 4 左右,认可度超过 70%;相对而言,景区的治安认可度较低,仅 55.9%,均值 3.57。

表 38 游客特有形象统计表

因子	子项	平均值	标准差	不清楚	非常反对	反对	中立	赞成	非常赞成
				单位: %					
本土文化与环境	黄山的山水文化比其它地方更独特	4.23	0.903	47.17	31.84	15.57	1.89	1.65	1.89
	黄山的居民更加友善热心	3.73	0.968	23.11	31.37	31.13	6.37	1.65	6.37
	黄山的风景名胜更加独特	4.30	0.828	49.06	32.55	14.86	0.94	0.94	1.65
	黄山的休闲氛围更加浓厚	4.02	0.934	35.38	36.56	21.7	3.54	1.65	1.18
	黄山的环境更加整洁	4.25	0.799	44.34	37.5	15.09	1.42	0.47	1.18
	因子均值	4.11							
目的地吸引力	黄山景区比其它景区更吸引人	4.15	0.865	40.09	35.85	19.1	1.89	0.94	2.12
	黄山风景区的文化内涵更丰富	4.06	0.916	36.32	37.03	18.87	4.01	1.18	2.59
	黄山的治安好所以吸引人	3.59	1.063	20.05	33.96	26.89	9.91	4.01	5.19
	因子均值	3.93							
旅游吸引物	黄山的旅游景点比其它地方多	3.99	0.949	33.73	35.85	21.46	4.25	1.65	3.07
	黄山是中国山水文化的典范	4.36	0.762	50	37.26	10.38	1.42	0.47	0.47
	体现了中国天人合一的思想	4.23	0.829	43.4	36.56	15.09	2.36	0.47	2.12
	黄山的奇松怪	4.59	0.664	67.22	25.47	5.66	0.94	0.24	0.47

	石非常独特								
	自然景观比其他景点的更壮观	4.49	0.751	59.67	26.18	9.43	0.94	0.47	3.3
	因子均值	4.33							

3.3.2 居民感知的特有形象

相比于认知形象,居民对黄山特有形象的感知程度普遍较高,证明了黄山品牌在独特性上具有一定的优势。统计结果反映居民对“本土吸引物”感知程度最强烈,而在这一维度中,均值较高的则是与黄山自然风光有关的两项,分别为“黄山的奇松怪石很独特”和“自然景观比其他地方更加壮观”。这说明黄山现有品牌构成部分中,风景优美这一优势已经被广泛认知。

居民对“本土文化与环境”的认知程度位于其次,这一维度中均值最高的一项为“黄山的风景名胜更加独特”。因此,总的来说,居民对黄山风景的认同度非常高,但是对于社区友好环境、景区氛围、景区环境、景区文化传播等的认同度并不高。

表 39 居民特有形象统计表

因子	子项	平均值	标准差	不清楚	非常反对	反对	中立	赞成	非常赞成
				单位: %					
本土文化与环境	黄山的山水文化比其它地方更独特	4.33	0.844	0	1.1	2.2	11.0	34.1	51.6
	黄山的居民更加友善热心	4.40	0.787	0	0	2.2	12.1	29.7	56.0
	黄山的风景名胜更加独特	4.42	0.790	0	0	4.4	5.5	34.1	56.0
	黄山的休闲氛围更加浓厚	4.05	0.982	0	1.1	5.5	22.0	29.7	41.8
	黄山的环境更加整洁	4.09	1.061	1.1	0	7.7	17.6	27.5	46.2
	因子均值	4.26							
目的地吸引力	黄山景区比其它景区更吸引人	4.10	1.065	2.2	1.1	2.2	16.5	35.2	42.9

	黄山风景区的文化内涵更丰富	3.98	1.085	3.3	0	2.2	19.8	39.6	35.2
	黄山的治安好所以吸引人	3.99	0.972	0	2.2	5.5	17.6	40.7	34.1
	因子均值	4.02							
本土吸引物	黄山的旅游景点比其它地方多	4.12	0.929	0	1.1	3.3	20.9	31.9	42.9
	黄山是中国山水文化的典范	4.33	0.895	1.1	0	2.2	11.0	33.0	52.7
	体现了中国天人合一的思想	4.07	1.172	4.4	0	2.2	14.3	36.3	42.9
	黄山的奇松怪石非常独特	4.57	0.701	0	0	2.2	5.5	25.3	67.0
	自然景观比其他景点的更壮观	4.51	0.835	1.1	0	1.1	7.7	25.3	64.8
	因子均值	4.32							

3.4 目的地情感形象

3.4.1 游客感知的情感形象

游客根据游览体验给黄山印象总体打分,从1到7由非常认同到非常不认同进行评分,从下表可以看出,游客的心情基本是比较兴奋激动并且愉悦的,但无论从均值还是从百分比上看,黄山的轻松程度相对来说低一些,在访谈过程有不少游客表示整个登山过程是比较累的。

表 40 游客情感形象统计表

情感	均值	标准差	百分比						
			1 (非常)	2	3	4	5	6	7 (非常不)
兴奋	2.17	1.74	57.5	13.7	8.7	4.5	9.0	2.4	4.0
愉悦	2.22	1.85	56.6	15.8	7.8	4.0	6.6	2.8	6.4
轻松	2.86	2.16	44.1	12.7	10.4	7.3	9.2	4.0	12.3
激动	2.42	2.02	52.6	15.3	10.8	3.8	4.5	2.4	10.6

3.4.2 居民感知的情感形象

表 41 为居民对游览黄山时的情感感知，由表格可以发现居民对“愉悦”这一情感感知最为强烈，而对于“激动”这一情感感知最弱。其原因可能为社区居民日常生活与黄山息息相关，所以他们对黄山已经十分了解，因此相对于游客来说，居民在游览时则不会很激动。而黄山这个景区对于当地社区居民来说更多的意味着一个“公园”，所以游览时一般心情很舒畅、愉悦。

表 41 居民情感形象统计表

情感	均值	标准差	百分比						
			1 (非常)	2	3	4	5	6	7 (非常不)
兴奋	1.89	1.501	62.6	16.5	5.5	6.6	4.4	2.2	2.2
愉悦	1.75	1.379	67.0	14.3	7.7	4.4	3.3	1.1	2.2
轻松	2.59	1.862	41.8	16.5	15.4	11.0	5.5	2.2	7.7
激动	2.65	2.078	41.8	23.1	9.9	7.7	3.3	0	14.3

4 结论与讨论

旅游目的地的品牌形象主要包括了三个部分，认知形象、特有形象和情感形象。其中游客在“认知形象”、“特有形象”和“情感形象”三方面的感知都高于居民，这是因为居民在黄山脚下生活，黄山对于他们的旅游功能比较弱，对其形象的认知程度相对不太高，而且问卷并不是在他们旅游的过程中派发的，因此他们的感知相对较弱。

其次，游客和居民对黄山的特有形象感知高于认知形象，居民对特有形象和认知形象感知的差值愈发明显，这证明了黄山品牌的独特性得到大众的认可，认为黄山比别的景区更有特色，同时游客也认为“独特性”是目的地品牌形象比较重要的方面，因此黄山品牌在建设的过程中也应该强调其独特的地方。

情感形象方面，其中的“轻松”“激动”的认可度比较低，因为山岳型的旅游目的地需要游客具有充沛的体力，需要大量的运动，而因此并不“轻松”，同时黄山是自然文化遗产，其雄伟程度不及“长城”、“故宫”这类历史文化深厚的遗产，所以产生激动的情感也偏低。

表 42 游客与居民对黄山品牌形象对比表

形象	子项	游客均值	居民均值
认知形象	体验质量	4.00	4.00
	旅游吸引物	3.84	3.45
	环境与基础设施	3.97	3.99
	娱乐活动	3.66	3.41
	文化传统	4.14	3.70
均值		3.92	3.71
特有形象	本土文化与环境	4.26	4.11
	目的地吸引力	4.02	3.93
	本土吸引物	4.32	4.33
均值		4.20	4.12
情感形象	兴奋	1.89	2.17
	愉悦	1.75	2.22
	轻松	2.59	2.86
	激动	2.65	2.42
均值		2.22	2.42

根据以上数据分析可得,从黄山社区居民的角度来看,目前黄山品牌最突出的一个部分是其自然风光。黄山自古以来就是中国名山,其自然资源条件十分优越。因此,黄山在其品牌建设中更应该注重这一个部分,充分发挥其优势。

黄山在建设旅游目的地品牌时还应该考虑到游客与当地居民的关系,增强他们之间的互动。就目前而言,黄山的一般游客与当地居民只有买方和卖方的关系,甚至有一些游客几乎没有接触过当地居民。黄山作为一个旅游目的地应尽量使游客认识和了解到当地居民的一些生活片段,使他们产生除了买卖之外的其他交集。这样有利于游客与当地居民,进而与整个黄山产生更多的情感联系,以提高游客的重游率和向外宣传黄山的概率。

黄山是一个风景名胜区,更是一座文化名山,它代表着很多中国的传统文化。但是,现在很多居民并不清楚黄山的文化意义,绝大多数游客也并不知道黄山游的文化内涵。因此,黄山在品

牌建设过程中,更应该注重文化传播这一部分,努力让大家知道并且认可“文化名山”这个称号。

专题二 中小企业社会责任及品牌意识

1. 背景

在黄山周边的社区分布着众多的中小企业,这些中小企业负责了绝大部分黄山游客在黄山旅游的购物、住宿、餐饮。黄山周边社区的中小企业已经成为了黄山风景区的重要组成部分之一,这部分中小企业不仅极大影响着黄山的周边环境,同时也影响着游客对黄山的印象。因此,中小企业的社会责任及品牌意识对于黄山风景区的发展有着举足轻重的地位。

企业社会责任是指企业在法律要求之外、从社会利益角度出发的一系列行为。⁷Carroll 曾提出过一个 CSP 三维模型——企业社会责任观、企业社会响应观、企业社会价值观,并将企业社会责任分为经济责任、法律责任、道德责任和企业自由决定的责任。⁸有研究表明,企业社会责任是企业品牌影响力的重要来源,因此企业承担正确的企业社会责任不仅会对周边环境带来正面的影响,也会有助于企业的良好发展。

品牌意识是指在消费者意识中品牌图式激活的情况,与记忆中品牌中心点或痕迹的强度有关联,能反映在不同的条件下消费者识别品牌的能力。同时,知觉和态度、社会因素、广告等因素都会在一定程度上影响品牌意识。⁹品牌意识能促进产品销售,监督和保证产品价值品牌,实现规模经济效益,保证企业不断壮大和持续。¹⁰

2. 调研过程

此次监测对象为在黄山风景区缓冲区内的中小企业工作的人员,包括老板、合伙经营者、员工。调查方向是中小企业对社会责任、品牌意识、发展前景的看法。采取的调查方法主要以问卷

⁷ Davis K. Can business afford to ignore social responsibilities [J]. California Management Review, 1960, (2) : 70- 76.

⁸ Carroll A. B. A three-dimensional conceptual model of corporate performance [J]. Academy of Management Review, 1979, 4 (4) : 497- 505.

⁹ 陆跃祥. 简论品牌意识的研究[J]. 中国青年政治学院学报, 2006(6) : 99

¹⁰ 关丽娟. 如何增进抚顺中小企业的品牌意识[J]. 中小企业管理与科技(上旬刊). 2009(02)

发放为主,访谈为辅。在6月30日至7月7日调研期间共发放中小企业有效问卷85份,其中汤口镇40份、寨西镇25份、翡翠新村9份。在问卷设计上,采用李克特5级量表设计模式,即对量表中每题给出5个陈述,每一陈述有“非常同意”、“同意”、“不一定”、“不同意”、“非常不同意”五种回答,这五个答案按照同意度递增顺序排列,分别记为5、4、3、2、1,本节调查报告主要针对这85份问卷,并对问卷结果进行描述性统计分析。

3 中小企业基础分析

3.1 中小企业工作人员人口统计特征

(1) 性别比例协调

有效问卷共85份,性别一项有2份缺失。其中34名男性,占41%;女性49名,占59%。女性相对多一点,整体来说比例较为协调

(2) 中小企业人员以中青年为主

完成年龄的问卷有85份。其中25-50岁的人员最多,为73人,占据半数85.9%,每个年龄段21-30,31-40,41-50的,这三个年龄段分布人数相对均匀。较少的为20以下岁及50岁以上,分别为5人,7人各占5.9%、8.3%,如表43。

表 43 中小企业人员年龄分布

年龄					
		频率	百分比	有效百分比	累积百分比
有效	<20	5	5.9	5.9	5.9
	21-30	26	30.6	30.6	36.5
	31-40	21	24.7	24.7	61.2
	41-50	26	30.6	30.6	91.8
	51-60	5	5.9	5.9	97.6
	>60	2	2.4	2.4	100.0
	合计	85	100.0	100.0	

(3) 中小企业人员以黄山市居民为主

完成来源地问卷有85份。其中中小企业人员主要来自黄山市,其次为安徽省其他城市,再

次则为其它省份及境外，其频数及百分比如表 44。

表 44 中小企业人员户籍分布

户籍					
		频率	百分比	有效百分比	累积百分比
有效	本市	64	75.3	75.3	75.3
	本省	13	15.3	15.3	90.6
	外省	7	8.2	8.2	98.8
	境外	1	1.2	1.2	100.0
	合计	85	100.0	100.0	

(4) 中小企业人员受教育程度较低

完成受教育程度的问卷为 85 份。其中初中，高中或中专人数最多，分别为 31 人、32 人，占 36.5%、37.6%，只有 3 人是本科学历或以上，总体人员受教育程度较低。

表 45 中小型企业人员受教育程度特征

受教育程度					
		频率	百分比	有效百分比	累积百分比
有效	小学或以下	9	10.6	10.6	10.6
	初中	31	36.5	36.5	47.1
	高中或中专	32	37.6	37.6	84.7
	大专	10	11.8	11.8	96.5
	本科	2	2.4	2.4	98.8
	研究生	1	1.2	1.2	100.0
	合计	85	100.0	100.0	

在对受教育程度和年龄的交叉分析中，从表 46 可以看出工作人员主要集中在 21-50 岁，在这一年龄段，初中，高中或中专的人群，有 56 人，占总数 65.9%。同时，21-30 年龄段与 41-50 年龄段相比，受教育程度普遍较高，这说明，黄山风景区周边的中小企业的工作人员总体受教育程度较低，21-30 年龄段的受教育程度与其它年龄段相比相对较高。

表 46 年龄和学历交叉分析表

受教育程度* 年龄 交叉制表								
		年龄						合计
		<20	21-30	31-40	41-50	51-60	>60	
受教育程度	小学或以下	0	0	0	6	1	2	9
	初中	1	8	10	12	0	0	31
	高中或中专	3	13	5	8	3	0	32
	大专	1	3	5	0	1	0	10
	本科	0	1	1	0	0	0	2
	研究生	0	1	0	0	0	0	1
合计		5	26	21	26	5	2	85

(5) 中小企业的职位以老板为主

完成职位的问卷为 84 份，如表 47，此次样本调查的职位以中小企业的老板为主，为 59 人，占 70.2%，其次为合伙人，有 14 人，占 16.7%。

表 47 样本职位情况

职位				
		频率	百分比	有效百分比
有效	老板	59	69.4	70.2
	合伙人	14	16.5	16.7
	员工	11	12.9	13.1
	合计	84	98.8	100.0
缺失	系统	1	1.2	

(6) 中小企业开店前经历

从开店前从事旅游行业经历、开店前创业经历交叉制表可以看出两种经历都无的人员较少，样本数为 24 人，占 28%，而两种经历都有的人员，为 31 人，占 36.5%。无论是从事旅游行业经历抑或是创业经历，72%中小企业的人员基本都有其中一种经历，或者是两种兼有。

表 48 开店前从事旅游行业经历、开店前创业经历 交叉制表

		开店前创业经历		合计
		是	否	
开店前从事旅游行业经历	是	31	17	48
	否	13	24	37
合计		44	41	85

3.2 中小企业经营特征

(1) 中小企业以独立经营为主

从表 49 看出,完成店铺性质的 82 个被访者中,黄山风景区周边社区的中小企业以独立经营为主,为 70 人,占 85.4%。

表 49 样本的店铺性质情况

		频率	百分比	有效百分比	累积百分比
有效	独立经营	70	82.4	85.4	85.4
	合伙经营	12	14.1	14.6	100.0
	合计	82	98.8	100.0	
缺失	系统	3	3.6		
	合计	85	100.0		

(2) 中小企业的房屋用房以租赁为主

完成职位的问卷为 85 份,如表 50,此次样本调查的中小企业的房屋用房以租赁为主,为 54 人,占 63.5%,其次为自己的房子,有 30 人,占 35.5%。

表 50 样本的店铺用房情况

		频率	百分比	有效百分比	累积百分比
有效	租赁	54	63.5	63.5	63.5
	自己的房子	30	35.3	35.3	98.8
	公房	1	1.2	1.2	100.0
	合计	85	100.0	100.0	

（3）中小企业的主要收入来源多数为旅游商品销售

完成职位的问卷为 85 份，如表 51，主要收入来源以旅游商品销售为主的中小企业，样本数达 32 份，占 37.6%，餐饮及住宿次之，分别占 22%、17%，部分中小企业有同时经营餐饮及住宿，其他类的有填写服装、零售、加工服务等。在被访的中小企业中，89.3%的中小企业以旅游商品销售，餐饮，住宿为主要收入来源。

表 51 样本的店铺主要收入来源情况

		频率	百分比	有效百分比	累积百分比
有效	门票	1	1.2	1.2	1.2
	景区交通	2	2.4	2.4	3.5
	旅游商品销售	32	37.6	37.6	41.2
	店铺租赁	1	1.2	1.2	42.4
	住宿	17	20.0	20.0	62.4
	其他	5	5.9	5.9	68.2
	餐饮	22	25.9	25.9	94.1
	住宿及餐饮	5	5.9	5.9	100.0
	合计	85	100.0	100.0	

（4）中小企业成立时间以 10 年以下的为主

完成成立时间的问卷为 84 份，如表 52，此次样本调查的中小企业的成立时间跨度为 1985 年~2014 年，接近 30 年。样本中 80 年代成立的中小企业最少，占 3.6%，90 年代成立的中小企业的样本数占 8.3%，00 年代和 10 年代目前成立的中小企业数目前相同，同样占 44.1%。

表 52 样本的店铺成立时间情况

成立于					
		频率	百分比	有效百分比	累积百分比
有效	2014	10	11.8	11.9	11.9
	2013	2	2.4	2.4	14.3
	2012	12	14.1	14.3	28.6
	2011	4	4.7	4.8	33.3

	2010	9	10.6	10.7	44.0
	2009	5	5.9	6.0	50.0
	2008	9	10.6	10.7	60.7
	2007	2	2.4	2.4	63.1
	2006	2	2.4	2.4	65.5
	2005	3	3.5	3.6	69.0
	2004	2	2.4	2.4	71.4
	2003	3	3.5	3.6	75.0
	2002	2	2.4	2.4	77.4
	2001	3	3.5	3.6	81.0
	2000	6	7.1	7.1	88.1
	1999	1	1.2	1.2	89.3
	1998	1	1.2	1.2	90.5
	1995	1	1.2	1.2	91.7
	1994	1	1.2	1.2	92.9
	1993	1	1.2	1.2	94.0
	1992	2	2.4	2.4	96.4
	1988	1	1.2	1.2	97.6
	1987	1	1.2	1.2	98.8
	1985	1	1.2	1.2	100.0
	合计	84	98.8	100.0	
缺失	系统	1	1.2		
合计		85	100.0		

(5) 中小企业的员工人数基本都为7人以下

完成职位的问卷为84份，如表53，此次样本调查的中小企业的员工人数跨度为0~14人，

员工人数为 7 人以下的中小企业占大多数，占 91.8%，其中员工人数为 2，3，4 的样本数为 21，16，20，分别占 24.7%，18.8%，23.5%。

表 53 样本的员工人数情况

		频率	百分比	有效百分比	累积百分比
有效	0	1	1.2	1.2	1.2
	1	8	9.4	9.4	10.6
	2	21	24.7	24.7	35.3
	3	16	18.8	18.8	54.1
	4	20	23.5	23.5	77.6
	5	7	8.2	8.2	85.9
	6	5	5.9	5.9	91.8
	7	1	1.2	1.2	92.9
	8	3	3.5	3.5	96.5
	10	2	2.4	2.4	98.8
	14	1	1.2	1.2	100.0
	合计	85	100.0	100.0	

(6) 小结

在中小企业人口特征方面，可以从年龄、受教育程度、职位交叉制表看出，年龄 21-50，学历为初中，高中或中专的老板占近半被访中小企业人员，41 名，占 48.2%，而其他特征的中小企业人员所占人数则比较小，特征也比较分散。

表 54 年龄、受教育程度、职位 交叉制表

职位	受教育程度						合计
	小学或以下	初中	高中或中专	大专	本科	研究生	

老板	年龄	<20	0	1	1	0	0		2
		21-30	0	6	6	1	1		14
		31-40	0	9	3	2	0		14
		41-50	6	10	7	0	0		23
		51-60	1	0	3	0	0		4
		>60	2	0	0	0	0		2
	合计		9	26	20	3	1		59
合伙人	年龄	<20		0	1	0	0		1
		21-30		0	4	1	0		5
		31-40		1	1	3	1		6
		41-50		0	1	0	0		1
		51-60		0	0	1	0		1
	合计			1	7	5	1		14
员工	年龄	<20		0	0	1		0	1
		21-30		2	3	1		1	7
		31-40		0	1	0		0	1
		41-50		2	0	0		0	2
	合计			4	4	2		1	11

在店铺经营特征方面,可以从员工人数、主要收入来源 交叉制表知道员工数 2~4 人,主要收入来源为旅游商品销售、住宿、餐饮的中小企业企业占多数,样本数达 53,占 62.4%,而其他特征的中小企业人员所占人数则比较小,特征也比较分散。

表 55 员工人数、主要收入来源 交叉制表

		主要收入来源								合计
		门票	景区交	旅游商	店铺	住宿	其他	餐饮	餐饮及住	

			通	品销售	租赁				宿	
员工人数	0	0	0	1	0	0	0	0	0	1
	1	1	0	4	0	0	3	0	0	8
	2	0	0	10	0	3	2	5	1	21
	3	0	0	8	1	4	0	3	0	16
	4	0	0	6	0	5	0	9	0	20
	5	0	1	1	0	2	0	1	2	7
	6	0	0	1	0	1	0	2	1	5
	7	0	0	0	0	0	0	1	0	1
	8	0	1	0	0	1	0	0	1	3
	10	0	0	0	0	1	0	1	0	2
	14	0	0	1	0	0	0	0	0	1
合计		1	2	32	1	17	5	22	5	85

4 中小企业社会责任

4.1 产品与服务

75.3%的被访者认为本店有不断推出新的产品和服务,96.4%的被访者认为本店是有不断提高产品质量和服务质量的,95.3%的被访者认为本店产品和服务质量可靠、安全、卫生,96.5%的被访者认为本店产品服务价格合理公道,94.1%的被访者认为本店会尽可能提供顾客需要的信息。数据表明,绝大多数被访者都认为自己的企业在产品质量和服务质量方面表现优异并在不断提高,而且价格公道合理,但是被访者对新的产品和服务方面的追求远远不如产品质量和服务质量,这表明部分中小企业没有意识到推出新的产品和服务的重要性或是中小企业不知道推出何种新的产品和服务,这将可能导致黄山周边社区中小企业同质化程度加重。

4.2 本地环境的保护

64.7%的被访者认为店铺非常依赖本地环境和居民、政府的支持,77.1%的被访者认为店铺应

使用环保能源（如太阳能、风能等），91.8%的被访者认为店铺采用的设备、材料应符合环境法规和标准，82.3%的被访者认为店铺应使用节能、节水装置（如节能灯、感应水龙头等），75.3%的被访者认为店铺应对垃圾进行分类（纸、金属、厨余等），55.3%的被访者认为店铺应对资源进行重复利用（如纸张、水等），78.8%的被访者认为店铺应避免使用对环境有害的清洁用品、一次性用品。数据表明，部分中小企业的人员并不看重本地环境，虽然大部分人员有意识遵守环境法规和标准，但是在环保能源，节能装置，垃圾分类这种政府没有强制监督的项目方面，中小企业人员的重视程度都相对有所降低，尤其是在资源重复利用方面，只有 55.3%的被访者认为店铺应该对资源进行重复利用。

4.3 员工待遇

92.9%的被访者认为店铺不应拖欠员工工资，95.3%的被访者认为店铺应给员工发放合理的工资，92.9%的被访者认为店铺应为女性提供公平的工作机会，85.7%的被访者认为店铺工作安排应允许员工能兼顾家庭和生活，87%的被访者认为店铺应关注员工动态，帮助员工解决其困难。数据表明，在及时发放合理工资及追求女性工作平等方面，绝大部分中小企业的人员都有非常强烈的意识，但是对于企业应帮助员工兼顾家庭及解决困难的意识相对较弱。

4.4 本地的依附

62.3%的被访者认为店铺非常依赖本地居民、政府的支持，70.6%的被访者认为店铺应对本地发展出力（捐赠等），40%的被访者认为只要有可能就购买本地产品，即使价格更贵，69.4%的被访者认为应积极支持、参加本地的重大活动（如民俗节庆等），53.3%的被访者认为店铺应招聘本地居民。由此可见，大部分的中小企业的员工都是追逐利益最大化的，不会因为本地产品就去支持，也不会尽量聘请本地人，但是他们多数愿意对本地发展出力和参加本地活动。相对于产品与服务、对本地环境的保护、员工的待遇三方面来说，中小企业对本地的依附意识较弱，在实际调研过程中，我们发现不少被访者抱怨政府无所作为，而作为政府可以多于当地社区协商有关旅游活动事宜，并鼓励中小企业遵从公平贸易原则，尽可能采购当地物品并更多地吸纳当地人所提供的商业服务。

5 中小企业品牌意识

5.1 品牌意识现状

74.1%的被访者认为店铺应拥有区别其他店铺的特色(如装修、产品、服务等),83.5%的被访者认为店铺创建独特的店铺品牌有利于吸引顾客,94.1%的被访者认为特色、高质量的产品、服务可以吸引回头客,91.8%的被访者认为不断提高产品质量对品牌十分重要,92.4%的被访者认为店铺品牌、店铺商标受法律保护。数据说明,绝大部分中小企业的人员已经认识到品牌建设和特色服务的重要性,也认识到品牌和商标是应受到法律保护的,但是对于店铺是否应拥有区别其他店铺的特色,部分被访者给出了否定的回答。

91.6%的被访者认为本店产品和服务符合本地特色,47.1%的被访者认为本店产品和服务在本地较少,84.7%的被访者认为本店主要通过特色的产品、服务吸引顾客,50.6%的被访者认为本店有专门用于建设店铺品牌的费用,57.7%的被访者认为本店有通过广告等宣传自己的品牌和特色。绝大部分中小企业的人员已经认识到品牌建设和特色服务的重要性,也认识到自己的所在的店铺虽然符合本地特色,但是在本地中却又缺乏特色的产品和服务。不过,这部分的中小企业还是没有调动费用于店铺品牌建设,也没有通过广告宣传自己的品牌和特色,通过访谈,我们得知有部分中小企业人员认为即便今天自己的企业品牌建设得很好,有特色服务和产品,但是在黄山周边转眼就会被其它中小企业模仿,特色服务和产品很快就失去特色。

5.2 中小企业发展前景的看法

87.1%的被访者表示我愿意继续经营本店,77.6%的被访者表示我认为这样中小的店铺未来有更好发展前景,92.9%的被访者表示我希望未来做生意的环境能有显著改善,50.6%的被访者表示我认为做生意的环境提升主要依赖政府,70.6%的被访者表示我认为做生意的环境提升主要依赖店铺间合作,87.1%的被访者表示我认为旅游发展的越好,做生意的前景越好,78.8%的被访者表示我希望未来获得更多的政府帮助。

由数据可知,大部分的被访者还是愿意继续经营店铺,但是认为有更好发展前景的被访者却相对减少了,而绝大部分被访者希望未来的商业环境有所改善。不过相比依赖政府,更多被访者相信提升商业环境需要依赖店铺间合作,这表示被访者对政府的改善商业环境的能力还是有一定质疑,但是也希望未来能获得更多的政府帮助,同时,大部分被访者认为中小企业未来的发展前景还是需要依赖当地的旅游发展,黄山旅游的发展对黄山周边中小企业的商业发展前景有着较大

的影响力。

6. 结论与讨论

在产品服务的供给上，中小企业以传统餐饮为主，产品雷同。对于新产品和服务的追求，黄山周边中小企业无论是在社会责任上还是在品牌创建上的意识都相对薄弱，当地抄袭模仿现象严重，商家不愿投入时间金钱在商品和服务的创新上，商品服务的同质化不断加重，不利于品牌意识的建立。

在环境的保护上，黄山周边中过半数中小企业涉及住宿，餐饮等对环境有较大影响的行业，大多数中小企业有意识遵守环境法规和标准，但是在政府没有强制监督的项目方面，中小企业人员的重视程度都相对有所降低。

在员工待遇上，黄山周边中小企业有着良好的意识。他们及时发放合理工资、女性工作平等、兼顾家庭等方面，同时，黄山中小企业的员工性别协调，因此相信大部分企业不仅在意识上追求女性工作平等，也确实给了女性平等工作的机会。

在黄山市总体旅游发展的关注上，中小企业成员表示自己对市总体旅游发展重视程度一般。尽管中小企业大部分成员都是黄山市本地人，而且他们也意识到自身企业发展十分依赖黄山的总体旅游发展，但是他们仍是在追求自身利益的最大化，对于黄山市总体旅游发展重视程度一般去，缺乏从大局上考虑自身发展和社会责任的关系的意识。

在持续经营上，中小企业虽然不满但仍愿意持续经营。虽然过半的中小企业对于目前的状况不满，但是更多的中小企业愿意经营下去，这说明中小企业的对黄山未来的发展仍充满憧憬。

专题三 导游现状分析

1 背景

导游，是见证中国旅游业发展历程的一个群体。旅游发展的三十多年间，从受尊重、挣钱多、受追捧的香窝窝，到如今的高流动率、不太光辉的社会形象，导游这个职业经历了很大的变化。近几年，《八项规定》的实施及新《旅游法》的出台对我国旅游业的发展造成了很大的影响，作为与旅游休戚相关的导游，他们所受影响不言而喻。导游是一个地方旅游发展必不可少

群体之一，长时期的带团使他们有更多机会接触景区，从而更能发现景区一些隐蔽的问题。黄山作为我国发展较早、知名度较高的旅游景区，了解导游对其旅游发展的看法从而找出旅游发展中的一些问题，能够为黄山可持续发展提供帮助。

2 调研过程

本次对导游的访谈时间为7月4号下午与7月6号下午，地点为黄山慈光阁。主要是了解黄山导游对黄山近几年旅游发展的看法，对零、负团费这种现象的看法及对导游这一职业的看法，具体访谈问题主要包括以下四个：

(1) 受访者基本信息

(2) 您觉得黄山近几年来旅游发展怎么样？（可以从资源质量、管理、服务接待设施等方面讲）？

(3) 对于“零团费、负团费”这种现象，您怎么看？

(4) 您怎么看待导游这个职业？

表 56 受访者基本信息表

序号	性别	籍贯	做导游时长	主要线路	本次带团情况	黄山旅游旺季感知
1	男	河南	18 年	黄山及附近景点，如千岛湖、杭州、西递、宏村等	48 人，非散客拼团	七八月份、清明节三天假期、国庆节长假人比较多，五一小长假人比较少
2	女	不详	8 年	全国线路都走	非散客拼团	不了解
3	男	黄山市	8 年	主要是黄山这条线路	散客拼团	不详
4	男	不详	5 年	主要是黄山这条线路	不详	一般四五月份、七八月、十月份，春节期间自驾游多，团队少
5	男	不详	今年刚做	主要是黄山这条线路	散客拼团	不了解
6	男	黄山	15 年	主要是黄山这条线路	45 人，非	不详

		市			散客拼团	
7	男	黄山市	16 年	长线团，除了黄山，南京、苏州、上海也会去，跨省	47 人，非散客拼团	不详
8	男	河南	8 年	主要是黄山这条线路	46 人，非散客拼团	四月份人最多

3 对黄山旅游发展的评价

对于黄山近几年旅游发展的看法，8 位受访导游观点有些微差别，但大同小异，相互补充。

（1）游客结构上，团队游客降低，自驾游和散客增多

受访者普遍表示近几年黄山旅游人气越来越旺，游客人数也在增加，但是游客结构发生了很大变化，团队游客越来越少，自驾游和散客越来越多。禁止“三公消费”是主要原因，而私家车增多及游客素质的提高也是导致这种变化的原因。

“黄山旅游人气越来越旺了，根据黄山这边的统计，人数还在增长。这两年团队游客少多了，主要是政治原因，限制‘三公消费’，以前单位把旅游作为职工的一项福利，现在卡的比较紧，单位领导不敢了，以前无论哪个景点都是单位团队多一些，占到 60-70%，现在自驾游和散客游人数增多。”

——（受访者 1）

“原来一个月带 6-7 个团，现在一个月带 3-4 个团，原来团队人数很多，都是大队，现在人很少了，有的团才 7-8 个人，团的数量和质量都降低了。”

——（受访者 2）

（2）服务接待设施满意度高

对于黄山旅游资源的品质，受访者均表示品质很高。37.5%的受访者明确表示，相比较其他景区，黄山卫生搞的很好。但是黄山景区内厕所数量比较少，且分布相隔较远，给游客带来了一定的不便。

住宿餐饮在旺季会出现紧张情况，但是平时还是非常充裕，所以对此现象并无不满，而是表示理解，尤其是对黄山餐饮，表示物美价廉，非常实惠。

“服务接待设施、住宿餐饮方面也挺好的。旺季出现住宿餐饮紧张也很正常，必须要想开，也是没办法避免的，不过这个问题并不突出。”

——（受访者 3）

“住宿也不错，价格优惠，住得好。特殊情况，五一十一，就那么一到两晚会不够住，其他情况还好。”

——（受访者 3）

“黄山的餐饮不说全国，但在整个华东应该算最好的了，同等价位的比云南、北京、海南好多了，一般的客人在这里吃饭后意见不大，黄山吃的不好其他的地方就不能吃了。”

——（受访者 4）

（3）安全意识、维护意识及应急能力增强，员工服务质量有待提高

谈及黄山近几年的变化，受访者反映的问题主要集中在黄山景区的安全意识、维护意识、应急能力、服务意识方面。

受访者表示，黄山景区的安全意识、维护意识及应急能力越来越强了。

“安全意识在全国的景区当中应该算是最好的。最早的，你看这个门口排队买票的铁栏杆，之前是没有的，黄金周刚开始实施的时候，游客特别多，这边是用软绳子拉的，呈喇叭口形状，门口武警手拉着手把守秩序。天一黑，游客着急，就会疯抢购票，很容易发生踩踏事件。第二年马上意识到这个问题，就开始用铁栏杆了。”

——（受访者 5）

“设施还好，专门有一个工程队，对要修缮的路会做好修缮，保护比较好，不能光赚钱，也要维护，不然游客体验会很差。”

——（受访者 5）

“我们这个旅游巴士，以前车少一些，人流量大的时候会出现人等车的现象，但是现在这么多年黄金周了，也有经验了。因为新国线是全国连锁的嘛，一到黄金周人多的时候，就会从全国各地调车过来，等忙完了再撤走，有应急预案。”

——（受访者 3）

而对于景区的服务意识，受访者的负面评价多于正面评价，主要集中在山上酒店服务人员、

门票售票处及索道售票处工作人员的服务态度及意识。

“觉得黄山山上酒店服务员的态度不太好，比如白云宾馆啊，人一多，服务人员就没耐心了。”

——（受访者 2）

“客人买票效率不是很高。有时候明明有三个窗口，就只开一个，其他工作人员在那里闲着也不开窗卖票。”

——（受访者 6）

“服务态度很有问题，无论是对导游还是游客，都很有问题，面子工程，领导在就表现好点，只要不出大问题就没事。”

——（受访者 6）

（4）路线设置不合理，索道运力有改进

此外，有一位受访者表示黄山的旅游线路设置不合理，没有真正考虑游客的需求，主要体现在线路所串景点刻意追求数量，并未使游客完全欣赏到黄山最美的风光，而且部分节点设置存在利益关系。同时，该未受访者也表示，黄山存在政企不分现象，从而导游的诉求无处表达，而景区也出现“店大欺客”现象。

“路线设置的不合理，一日游游客的山里游览也就四个多小时吧，目前的线路包括十五个景点，哪有那么多时间走那么多景点？有些领导喜欢要五个、八个、十个、十二个景点，没必要为了数字而凑数字。制定路线的这帮人，可能在黄山生活了很久，但是还是对黄山不太了解，他们没有站在游客的角度来看黄山。比如说，现在所有的线路都要往北海宾馆那边转呢，北海宾馆只是一个宾馆，而黄山最美丽的地方却没有走。不是为了旅游而管理，而是为了领导。”

——（受访者 6）

“可以管理导游、监督导游的应该是黄山市旅游局，但是黄山专门成立了一个部门叫旅游办，给导游规定一些东西，规定好线路，不去考虑游客的需求、导游的想法，如果不按照他们的线路走就比较麻烦。”

——（受访者 6）

“垄断企业，景区门票、索道都是一家，在景区吃住不满意，要找旅游局提，但是旅游局比旅游办的级别都低，根本管不了旅游办。政企不分，既是企业又是事业单位。”

——（受访者 7）

8 个受访者在访谈中均谈到索道排队问题。部分受访者表示，相比之前，目前黄山索道有了很大的改进，由对开改为循环开放，单位时间载客量有了很大的提高，但是在旺季的时候仍然需要排很长时间的队，这在一定程度上降低了游客体验。

“索道排队时间长，现在每个周末都要排队。”

——（受访者 5）

“以前引进的是日本的索道，一个缆车做 40 个人，排队好几个小时，游客就会抱怨排队太长时间，坐索道还不如走路快。现在改为先进的索道了，两个缆车相互对开，人一多它就会加快速度。现在的玉屏索道一个小时可以运输 1000 多人。”

——（受访者 5）

（5）黄山景区对导游“既苛刻又仁慈”

有受访者用“既苛刻又仁慈”表达黄山景区对导游的态度，“苛刻”体现在索道乘坐规定上，而“仁慈”则体现在导服费相比较其他景区要相对高一些。

“坐索道，如果你没带 12 个客人，导游是不给免票的，一直有这个规定，原来是 16 个。有时候导游为了能够坐索道而带的游客又不足 12 个的时候，就想办法，自己买票再卖给散客，黄山导游卖票是全国导游中唯一的景观啊，只有黄山索道要求人数，其他景区索道都是全免的。”

——（受访者 3）

4 对零、负团费的看法

受访者对零、负团费看法基本一致，绝大部分受访者认为这是一个不正常的现象，应该坚决制止。

首先，它损害了游客的利益，其次增加了导游的心理压力，损害了导游的社会形象。而小部分人也表示虽然这是一个不健康、不正常的现象，但是部分游客存在贪小便宜的心理，不能把责任全部推向导游。

目前出台的《旅游法》在一定程度上遏制了这种现象，再加上游客对高质量旅游体验的追求及法律意识的提高，零、负团费现象也会越来越少。但是，贪小便宜的心理与中国目前的国情有一定关系，短期很难改变。有需求就会有供给。所以零、负团费这种现象目前还无法从根本上杜

绝。

当问及黄山是否存在零、负团费这种现象时，8位受访者均表示，黄山在这个方面做得比较好，基本不存在这种现象。除了法律的明令禁止及黄山市领导对此现象的重视，还有以下几个原因：

（1）黄山导游收入相对较高；

“黄山和其他地方不一样，黄山导游就是靠爬山赚导游费。这边导游收入蛮高的，相比较其他地方好很多。其他地方导游是没有基本工资，黄山这边的导游有，是旅行社发的。”

——（受访者8）

（2）黄山景区门票、索道票、住宿等严格的价格控制；

“黄山之所以没出现这种现象（即零、负团费），是因为垄断，价格控制很死。黄山是最早实行没有团体票的景区，无论是门票还是索道，100个人来买是这个价格，1个人来买还是这个价格，没有批发价和零售价之差，所以导游根本没办法赚到差价。”

——（受访者6）

（3）黄山旅游属于“卖方市场”；

“一般的景区都是景区求旅行社，但是黄山景区是旅行社求景区，尤其是旺季，房间拿不到，价格是定死的，房间我可以给你也可以给他，平时表现比较好，和谁的关系处的好，可能就会把房间给谁了。要是平时不老实，是很难生存下去的。”

——（受访者6）

（4）黄山人对黄山形象的自觉维护。

“特别是旅游秩序，无论是山顶还是山脚，不会出现骗游客啊、强买强卖啊，包括导游都不会这样。”

——（受访者3）

“黄山导游脑子里还是有这个意识的，黄山市每年财政的70%的财政收入，2/3的就业人口都是依靠旅游。所以每个人在自己能力范围内尽自己的能力去维护黄山的形象，尽量让游客少投诉，就包括你到山上去问导游路，他们都会热心的回答你的，尽管你不是他们团的。”

——（受访者3）

5 对导游职业的看法

受访者均表示目前导游待遇较差，是一个需要社会关注的群体。

50%受访者用“打零工”来形容他们的生存状态：没有三金五险、收入不稳定。导游的收入主要是“基本工资+导服费+差价收入”。而目前，我国很多旅行社是不给导游发基本工资的，而只有导服费，而导服费是按照带团的“天数”和游玩的“景点数”收取的，因而收入很不稳定。关于差价收入，并不是购物提成，它是景区给导游的返利，并没有损害到游客的利益，但是游客往往不理解而对导游产生误解，导游表示非常委屈。再加上旅游淡旺季很明显，所以平均下来，目前导游收入并不高。

游客素质的提高对导游的素质也提出了更高的要求，但是导游的待遇并没有太大的提高，这也在一定程度造成了导游内心的失衡。而高、中、低级导游待遇的微小差异也挫伤了导游进取的积极性。

部分受访者也表示，鉴于导游收入低及不稳定，再加上长期奔波比较辛苦，目前他们正在逐渐转行做其他。但是他们普遍表示，转行很难，因为自己本身没有一定的专业特长，又习惯了导游的自由与散漫，因而转行需要一个过程。不过整体来说，导游职业的流动性相对比较高。

6 结论与建议

总的来说，受访导游认为近几年来黄山旅游发展总体呈上升趋势，资源保护卓有成效、基础设施及旅游配套服务设施比较完善，但景区员工服务素质有待提高。

针对零、负团费，绝大部分受访者表示应该坚决杜绝。新《旅游法》出台在一定程度上遏制这种现象，但是后续效果如何还需拭目以待。

近些年导游的社会形象受到重创，工资待遇差，生存状态堪忧。整个导游职业呈现高流动率的态势。

基于此提出以下建议：

对景区员工实施教育和培训，结合奖惩制度，以提高员工服务意识；

拓宽信息传递途径，提高信息传递效率；

明确导游薪资福利，做好晋升激励制度；

法律法规监督不能松懈。

Monitoring Report on Sustainable Tourism Development of Mt. Huangshan

Mt. Huangshan Administrative Committee

Monitoring Center for UNWTO Sustainable Tourism Observatories

2014.09

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1 Foreword

1.1 Background

Mt. Huangshan, as a world-class scenic zone, is an outstanding representative of mountain-type tourist destination in China. As a tourist destination integrated with many domestic and foreign credits, including first batch of top ten scenic zones in China, 5A tourist attraction in China, National Civilized Scenic Area, World Cultural and Natural Heritage, and World Geological Park, sustainable tourism development in Mt. Huangshan draws the attention of China and the world. On February 26, 2008, the World Tourism Organization and United Nations Educational, Scientific, and Cultural Organization formally established Mt. Huangshan observatory for WTO sustainable tourism destination and (Huangshan) observation area for sustainable tourism development of World Heritage Sites. The purpose is to explore a development pattern that maximizes tourism economy and community benefits and minimizes negative environmental impacts at world heritage sites by long-term monitoring various indicators such as tourist perception and satisfaction and tourism's impact on communities and by collecting a variety of indicators on the sustainable tourism development of Mt. Huangshan..

Since 2006, Sun Yat-Sen University has successfully completed the 2006-2008 monitoring reports on Yangshuo, China in accordance with the indicators and methods of GOST project under UNWTO; on May 30, 2011, Mt. Huangshan scenic spot Administrative Committee formally signed a cooperation agreement regarding the construction of monitoring center with Sun Yat-Sen University and joined technology assessment system of GOST project under UNWTO. On August 22, 2011, the Monitoring Center for Sustainable UNWTO Tourism Observatories officially launched a five-year monitoring and management of Mt. Huangshan sustainable tourism development. Sun Yat-Sen University completed the monitoring of sustainable tourism development of Mt. Huangshan through three field surveys respectively in March, May and September in 2012. On August 28, 2013, the Monitoring Center continued 11-day monitoring and completed the analysis on value identification and the case of the Jade Valley. With great support and active cooperation of Mt. Huangshan scenic spot Administrative Committee, Sun Yat-Sen University sent a monitoring group to conduct field surveys in Huangshan from June 30 to July 7 in 2014. Through a comprehensive survey of environmental, social and economic impacts of Huangshan tourism development, its management experience of sustainable tourism development can hopefully be summarized and promoted around the globe.

1.2 Monitoring Methodology

1.2.1 Monitoring Process

This project monitors the scope of the overall planned Huangshan scenic spot (2006) and its buffer, specifically including the Huangshan scenic spot of 160.6 km² and the surrounding five towns and one farm (Tangkou, Tanjiaqiao, Sankou, Gengcheng and Jiaocun Towns and Yanghu Forest Farm in Huangshan District, with a total administrative area of about 490 km²).

Based on the summary of the monitoring results in the first, second and third rounds, the supplements and adjustments have been performed in this survey as follows:

From June 30 to July 7 in 2014, the monitoring group, composed of two professors from Center for Tourism Planning Research of Sun Yat-Sen University (hereafter referred to as the “CTPR”), one project coordinator from Monitoring Center, three post-graduate students, 11 undergraduate students and one foreign international volunteer, through questionnaires, field surveys and interviews, completed the following studies: 1) Tourist satisfaction; 2) environmental, social and economic impacts of tourism in Huangshan on the five towns; 3) tourists' and the buffer residents' perception of Huangshan Brand 4) Social responsibilities and brand awareness of SMEs in the buffer; 5) tour guides' evaluation of Huangshan's development. In this survey, 424 effective questionnaires were collected from the tourists, along with 270 effective ones on the communities' perceptions and attitudes, including 221 from Tangkou (61 from central villages of Tangkou, 120 from Zaixi, 5 from Jade new village (Shancha), 19 from Fangcun and 16 from Gangcun), 13 from Gengcheng, 13 from Jiaocun, 10 from Tanjiaqiao and 13 from Sankou, 85 ones from SMEs in the buffer and 91 ones on the buffer residents' perception of Huangshan Brand Image. Tour guides, key officers of the buffer towns, family inn keepers in Jade Valley of Shancha Village, employees in scenic zone and retirees were interviewed and then relevant second-hand sources were collected.

1.2.2 Screening of key issues and indicators

Based on the monitoring experience in the first, second and third rounds, basic indicators for sustainable tourism development of Huangshan scenic spot have been developed, integrated with UNWTO's indicators and methods, and “the General Plan of Huangshan scenic spot” and the reality of the development of Huangshan scenic spot, specially as shown in Table 1.

Table 18 Summary of key topics and basic indicators of sustainable tourism development
monitoring of Huangshan scenic spot

	Key topics	Basic monitoring indicators	Regular monitoring ?	Recommended monitoring frequency
Tourism and protection of resources and environm ent	Biodiversity conservation	1. Number of national key species	Yes	5 years
		2. Endangered species and quantities	No	5 years
		3. Quantity, distribution and degree of protection of famous ancient trees	Yes	5 years
		4. Forest coverage	Yes	5 years
		5. Cooperative scientific research projects on resource conservation, tasks, cooperative agencies, duration	No	1 year
		6. Additional protection measures	No	2 years
	Conservation of cultural resources	7. Quantities of cliff stone inscriptions and cultural relics, and protection	Yes	5 years
		8. Funds used for cultural relic protection (restoration, protection and maintenance), and proportion thereof	No	1 year
		9. Additional policies and protection measures	No	5 years

	Tourist diversion	10. Proportions of entering tourists at different gates	Yes	1 year
	Aquatic environment	11. Conformance to standard of surface water quality	Yes	1 year
		12. Conformance to standard of drinking water quality	Yes	1 year
		13. Annual domestic sewage treatment capacity and peak daily treatment capacity in season	Yes	1 year
	Acoustic environment	14. Conformance to standard of domestic and traffic noise	Yes	1 year
	Atmospheric environment	15. Conformance to standard of air quality	Yes	1 year
	Solid waste	16. Annual output of solid waste	Yes	1 year
		17. Methods of waste disposal	Yes	5 years
		18. Proportion of recycled waste to total waste	Yes	1 year
	Reputation of main attractions	19. Reputation of main attractions	No	3 years
	Construction area of reserves	20. Construction area and concentration in reserves	Yes	3 years
		1. Community's population (locals and non-locals)	Yes	3 years

Tourism and community	Tourism development	2. Number of attractions	Yes	1 year
		3. Number of accommodation facilities	Yes	1 year
		4. Number of tourists received	Yes	1 year
		5. Overall impact of tourism on local communities	No	2 years
	Residents' attitude and perception of impacts	6. Overall attitude of residents towards tourism development (questionnaire)	No	1 year
		7. Residents' perception of economic, social and cultural impacts of tourism	No	1 year
	Community's participation and awareness	8. Percentage (quantity) of community residents doing tourism-related jobs and main types	No	1 year
		9. Community residents' perception of their participation in tourism	No	1 year
		10. Community residents' perception of the concept of “sustainable tourism development”	No	1 year
		11. Issues on tourism development concerned by community residents	No	1 year
	Business	12. Satisfaction of tour guides and	No	1 year

	partners' satisfaction	travel agencies		
Tourist perception and satisfaction	Tourist satisfaction degree	1. Tourist satisfaction degree on sources, services, overall environment and other aspects in Mt. Huangshan	No	1 year
		2. tourist overall satisfaction	No	1 year
		3. Tourist perception of whether the tourist experience is as expected	No	1 year
		4. tourist revisit rate and recommendation intention	No	1 year
		5. Tourist complaint rate in the Huangshan scenic spot	Yes	1 year
	Tourist safety	6. Incidence of tourist accidents	Yes	1 year
		7. Tourist perception of safety in Mt. Huangshan	No	1 year
	Tourist education	8. Proportion of tourists participating in interpretive and educational programs held in Huangshan scenic spot	No	1 year
Economic impacts of	Tourism revenue	1. Total number of tourists received by the Huangshan scenic spot	Yes	1 year
		2. Tourism statistics (gross tourism revenue, number of beds, number of tourists staying overnight, per capita spending,	Yes	1 year

tourism		etc.)		
		3. Number of tourists received by surrounding low-altitude attractions	Yes	1 year
		4. Tourism statistics of surrounding low-altitude attractions	Yes	1 year
	Tourism seasonality	5. Ratio of tourists in busy months to slack months	No	1 year
	Tourism and employment	6. Job opportunities created by tourism	No	1 year
		7. Satisfaction of tourism employees	No	2 years
	Tourism's role in driving economy	(specialized research)	No	3 years

Main body of the report is comprised of the following six parts, that is, tourism and resources, Environmental protection, tourism and community, tourist perception and satisfaction, conclusions and suggestions, and special studies (including these three topics of perception of Huangshan brand image by tourists and community residents, social responsibilities and brand awareness of SMEs in Huangshan buffer, and research on tour guides' evaluation of Huangshan development).

2 Tourism and protection of resources and environment

2.1 Monitoring of resources protection indicators

Table 19 Monitoring indicators and results of resources protection

Key topics	Indicators	Frequency	Departments	Means	Monitoring results in this survey
Biodiversity conservation	1.Number of national key species	5 years	Document and Archives Section under Bureau of Parks	General investigation of Biodiversity	28 wild animals and 37 wild plants under special state protection in Mt. Huangshan.
	2.Endangered species and quantities	5 years	Document and Archives Section under Bureau of Parks	General investigation of Biodiversity	A total of 42 rare and endangered animals and plants in Mt. Huangshan scenic spot. It is hard to identify target species and quantities because of the lack of monitoring data.
	3.Quantity, distribution and protection degree of famous ancient trees	1 year	Document and Archives Section under Bureau of Parks	Regular monitoring	No update. Identified in 2009 survey were 69 famous trees (54 of which are on World Cultural and Natural Heritage List).3 ancient trees under first class protection; 7 under second class protection; 57 under third class protection. 61 famous ancient trees in hot spring area, 19 of them on World Heritage List; 39 famous ancient

					trees in Tianhai area, 24 of them on World Heritage List; 19 famous ancient trees in Fusong area, 10 of them on World Heritage List; No famous ancient trees in Diaojiao area.
	4.Forest coverage	5 years	Document and Archives Section under Bureau of Parks	Regular monitoring	Data of forest resources inventory in 1976 shows that, The forest coverage was only 56%, the vegetation coverage was 71%, with a live stumpage of 365204 cubic meters. According to the survey of the forest resources conducted by Scenic spots in 1989, the forest coverage reached 83.4%, up 27.4% on 1976, the vegetation coverage 92%, up 21% and the live stumpage, 673438.5 cubic meters, up 308234.5 cubic meters. The data collection of State public welfare forest in 2004 shows, the forest coverage rose to 84.7%, the vegetation coverage 93%, with a live stumpage of 1580193 cubic meters.
	5.Cooperative scientific research projects on resource conservation, tasks, cooperation agencies, durations	1 year	Document and Archives Section under Bureau of Parks	This monitoring project	New projects such as “Central Government Forestry Technology Extension--Integrated Control of Aphrodisium Sauteri in Scenic Areas” as shown in Table 4
	6.Newn protection measures	2 years	Bureau of Parks	This monitoring project	The current major measures: Black Tiger Pine listed as special protection species on the Welcoming Pine Protection

					model; Upgrading of the emergency protection platform of steel structures of Welcoming Pine; First compilation of annual report of “panoramic” protection of Welcoming Pine(2013); Application and implementation of the many protection and research projects; The sixth general survey of famous ancient trees in Huangshan scenic spot; Improvement of permanently rigid support rods for Welcoming Pines and elastic cradle heads for key famous ancient trees; Adoption of APF-1 trap to eliminate adult Monochamus alternatus Hope based on the research results; Establishment of electronic monitoring system on inspection station for North American pinewood nematode in scenic areas, and forest inspection stations and stations at south, north and west gates of the scenic spot included in the system.
Conservation of cultural resources	7. Quantity and quality of Cliffside inscriptions and cultural relics	5 years	Cultural Relic Management Section under Politics Division	General survey of Cultural relics	295 cliff stone inscriptions left; 148 cultural relics; 1 “living cultural relic” of Huangshan Pinus (Guest-Greeting Pine), first case in China. In 2012, Mercy light pavilion roofing, Kitchen, Furong Cave and others were renovated. 3 cliff stone inscriptions were supplemented, as well as the names of three rain shelters and couplets of two.

8.Funds used for cultural relic protection (restoration, protection and maintenance), and proportion thereof	1 year	Cultural Relic Management Section under Politics Division	This monitoring project	In early 2013, The protection list of first batch of 41 key immovable cultural relics, 13 ancient buildings, 21 key historic sites and typical architectures of contemporary China, 1 cave temple, 1 stone carving and 1 others were published. Expenditures for the protection of cultural relics in 2013 were 3.42 million Yuan, accounting for 5.62% of funds to protect heritage sites. In 2014, Politics Bureau of the Huangshan scenic spot administrative commission received a document of “On Hiking Roads and Ancient Buildings in Huangshan—Approval of repairing construction of Mighty Light Tower (East and West Wings)” by the State Administration for Protection of Cultural Relics. Having approved by the Administration, the repairing construction of Mighty Light Tower (East and West Wings) was included in the year’s target
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	9.New policies and protection measures	5 years	Cultural Relics Management Section under Politics Bureau; Heritage office under Land Planning Bureau	This monitoring project	On 21st September, 2006, a special “Interim Regulations on the Preservation of Cultural Relics in the Huangshan Scenic Spot” was developed. Overall program of preservation of Cultural Relics in Huangshan was initiated.
Tourist diversion	10.Proportions of entering tourists at different gates	1 year	Statistics section under Group Company	This monitoring project	In 2013, Huangshan scenic spot hosted a total of 2,7465 million tourists. Among them, Yungu Temple (South Gate) received 11,448,100 tourists, accounting for 52.73%, Mercy Light Pavilion (South Gate) received 993,900 tourists, accounting for 36.19%, and Songgu Nunnery (North Gate) received 304.500 tourists, accounting 11.09%. South gate is still the main entrance. The tourist diversion was much the same as that in 2012.

Source: the sorted survey data

2.2 Biodiversity conservation evaluation

2.2.1 Overview

According to the Convention on Biological Diversity, the so-called biodiversity refers to all organisms and their complex on the Earth. It consists of genetic, species and ecosystem diversities.

As for ecosystem diversity, Located in mid-latitude subtropical region and influenced by the southeast monsoon, Mt. Huangshan, as a typical forest ecosystem, develops a large area of subtropical forest (including evergreen broad-leaved forest, evergreen deciduous broad-leaved forest, deciduous broad-leaved forest, mixed forest, etc. along with coniferous forest on the hilltop), with a forest coverage of over 75%.

As for species diversity, Mt. Huangshan has rich plant and animal species with 28 species of animals and 37 species of plants under State protection, for details see Table 3.

Table 3 Species of Plants and Animals in Mt. Huangshan

	General Species	Species under State protection
Animals	A total of 323 wild animals with 176 species of birds, 21 species of amphibians, 48 species of reptiles, 24 species of fish and 54 species of beasts, about two-thirds of total wild animal species in Anhui province	28 species of animals under State protection with 7 under State first-class protection(2 species of birds of <i>Syrnaticus ellioti</i> and <i>Ciconia ciconia</i> and 7 species of beasts of South China tiger, clouded leopard, <i>Panthera pardus</i> , black muntjac and sika deer) and 21 under State second-class protection (10 species of birds of mandarin duck, <i>A. leuphotes</i> , <i>Accipiter soloensis</i> , <i>Pucrasia macrolopha</i> , <i>Lophura nythemera</i> , <i>Centropus bengalensis</i> , <i>Strix leptogrammica</i> , eagle owl, Common Buzzard and Rough-legged Buzzard, 1 species of amphibians of giant salamander, and 10 species of beasts of <i>Lyssodes Speciose melli</i> , Rhesus Macaque, pangolin, jackal, Asiatic black bear, <i>Viverra zibetha</i> , Small Indian civet, Asian Golden Cat, roe and serow).
Plants	1805 species of 826 genus of 222 families of higher plants, over 7% of that in China (have	37 species of plants under State protection with 5 under State first-class protection (<i>Isoetes sinensis</i> , ginkgo, <i>Metasequoia</i> , <i>Taxus chinensis</i> and <i>Taxus chinensis</i> var <i>maire</i>), 16 under State second-class protection (<i>HerbofloatingFern</i> , <i>Pseudotsuga gaussenii</i> Flous, <i>Pseudolarix amabilis</i> , <i>Torreya grandis</i> , Chinese

	been found)	tulip tree, <i>Magnolia biloba</i> , <i>Cinnamomum japonicum</i> , <i>Calycanthus chinensis</i> , wild buckwheat, <i>Cercidiphyllum japonicum</i> , <i>Zelkova schneideriana</i> , <i>Ulmus elongate</i> , <i>Kirengeshoma palmate</i> , <i>Ormosia henryi</i> , <i>Eucommia ulmoides</i> and <i>Henry Emmenopterys</i>) , and 16 under State third-class protection (<i>Tsuga tchekiangensis</i> , <i>Magnolia amoena</i> Cheng, <i>Magnolia cylindrical</i> , <i>magnolia sieboldii</i> , <i>Litsea auriculata</i> , <i>Trillium tschonoskii</i> , <i>Gastrodia elata</i> , <i>Brachystachyum densiflorum</i> , <i>chinensis</i> var. <i>brevisepala</i> , <i>Dysosma versipellis</i> , <i>Euptelea pleiospermum</i> , <i>Stewartia sinensis</i> , <i>Pteroceltis tatarinowii</i> , <i>Sorbus amabilis</i> , <i>Tapiscia sinensis</i> Oliv and <i>Changium smyrnioides</i>).
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With rich biodiversity, Mt. Huangshan is one of the 108 biodiversity distribution centers in the world identified by IUCN (Jiangnan Hilly land and Zhejiang and Fujian mountains, IUCN Conservation office, 1990. Evaluation criteria: plant species diversity); and it is also one of the 33 recently-identified biodiversity conservation priorities in China (Evaluation criteria: the system of “Eco-regional Assessment” by the Nature Conservancy). In CBPF (China Biodiversity Partnership Framework), with the biodiversity Irreplaceability index ranking the highest in East China, Mt. Huangshan is a biodiversity hotspot most worth protecting in this area. From the above evidences, the biodiversity in Mt. Huangshan is of global significance.

2.2.2 Conservation status quo

Biodiversity conservation has always been a priority for the Huangshan scenic spot. This survey reveals that, the biodiversity conservation in the Huangshan scenic spot is in great condition on the whole. The concrete measures include:

(1) On eco-environmental protection, Mt. Huangshan Scenic Spot Administrative Committee has made a number of special plans such as the park eco-environmental protection, established ISO14001 environmental management certification system and created successfully ISO14000 National Demonstration Zone, pioneered the scenic spot enclosed rotation system, advocated and practiced low-carbon tourism, and made an investment of about 200 million Yuan on the relocation and ecological restoration in South Gate area.

By establishing a special agency to integrate capital, resources and technology, the Mt. Huangshan scenic spot took the lead of its kind in the country in accomplishing the "unified

sewage pipeline system", and completed the investigation of eco-environmental background value and started the construction of eco-environmental observatories. It strengthened fire prevention by "Integrated grid, density and all-weather" and established five resource conservation stations and automatic infrared monitoring system of forest fire, having no forest fire for 35 in succession and successfully preventing pine wood nematode disease from spreading into the scenic spot. Sewage treatment stations in Xihai and Furong Ridge along with garbage collection transfer stations in Hot spring and Yungu were established. PM2.5 monitoring is first performed in a mountain scenic spot like this in the country. And "Biodiversity Conservation in Huangshan" GEF project is launched.

Print "2014 the Huangshan Scenic Spot Eco-environmental Monitoring and Protection Special Action Plan"; Improve such measures as "scenic spot enclosed rotation, unified sewage pipeline system, garbage leaving mountains and cooking fume purification"; Meet the sewage discharge standard; Clear up the waste everyday.

In 2013, the Huangshan Scenic Spot organized the special environmental protection campaign of punishing enterprises that illegally discharge pollutants and keeping people healthy, intensified routine law enforcement and monitoring, continued to supervise the natural environment and had achieved great effect.

(2) In terms of famous ancient trees, the fifth survey of key famous ancient trees in the scenic spot was completed in 2009. A catalog of famous ancient trees has been established by identifying basic information, location, altitude, protection degree and age of all famous ancient trees in the Huangshan scenic spot. Key famous ancient trees are subject to the conservation and management system of "one tactic per tree" with long-term monitoring, expert consultation, guardianship and emergency response on every single famous ancient tree..

(3) In terms of scientific research cooperation, the Bureau of Parks of the Huangshan scenic spot has been working together in recent years with some scientific research agencies and universities to conduct studies on biodiversity research, conservation of famous ancient trees, and ecological maintenance, implement the project of "three lines of defence", strict quarantine and inspection at the mountain entrances, and strengthen the control of sources. Black Tiger Pine, classified as a special protection species based on the Guest-Greeting Pine protection model, is under 24-hour protection. The emergency protection platform for steel structures of Guest-Greeting Pine is upgraded. The first annual report of "panoramic" protection of Guest-Greeting Pine is compiled (2013). The project "Central Government Forestry Technology Extension-- Integrated Control of *Aphrodisium Sauteri* in the Scenic Spot" is declared and implemented. Skirts and fences protecting tree trunks in new-styled glass fibre are developed to renovate vegetation protection facilities. "The scenic spot post-doctoral research working station" is established and its research topic "Huangshan Pine Cavity Non-destructive Testing and Rot

Control Study” is started. The sixth general survey of famous ancient trees in the Huangshan scenic spot is carried out. Permanently rigid support rods for Guest-Greeting Pines and elastic cradle heads for key famous ancient trees are improved. The APF-1 trap is adopted to eliminate adult *Monochamus alternatus* hope based on the research results. The electronic monitoring system on quarantine and inspection stations for North American pinewood nematode in the scenic spot is built, and forest inspection stations and inspection stations at South, North and West gates of the scenic spot are included in the system. Based on the previous two monitoring reports, some research topics on biodiversity conservation have been updated and supplemented in this survey.

Table 4 List of the main new research topics on biodiversity conservation

Name	Task	Cooperation unit	Period
1.Risk assessment on breaking and lodging resistance of the famous ancient trees in the Huangshan scenic area	Perform non-destructive testing on the 136 famous ancient trees in the scenic spot; Analyze and assess the risk of breaking and lodging of those famous ancient trees which are decayed and defective and propose accordingly some scientific protection plans; Establish an archive regarding the health of the ancient trees in the Huangshan scenic spot.	Anhui Agricultural University	July2010—July 2015
2. Research on key technology of microbial control of Huangshan mountain pine red spider	Select two fungi featuring strong parasitic ability, fast speed and high lethality rate; Perform safety testing on selected strains; Study and explore industrial technology in strain breeding and spores extraction; Research and develop broad-spectrum, sustainable, efficient and composite microbial inoculums; Develop automatic sprayer of fungal spores.	Huangshan University	Jan. 2013 – Dec. 2016
3.Biodiversity conservation and sustainable use of	Deal with five major parts, such as 1) policies, plans and institution building on regional biodiversity conservation and sustainable use by Huangshan	Global Environment Facility	2012—2016 The preparatory

Huangshan area	city's national scenic resort, national-level and provincial-level nature reserve, etc, 2) the existing management and network construction of the reserve, 3) threat factor analysis, the biological corridor construction and alternative livelihood research of the reserve, 4)the education and improvement of capacity building and public awareness of the environment and 5) information distribution and experience sharing of the reserve.	(GEF)	work is started. (Jan.012—Apr. 2013)
4. Huangshan Pine Cavity Non-destructive Testing and Decay Control Study	Use TRU to test the rottenness of the two key famous pines of Guest-Greeting Pine and Black Tiger Pine; Identify pathogen of Huangshan Pine heartwood decay; Select a high-efficient and low-toxic antifungal agent to control the Huangshan Pine heartwood decay and design an application method with good maneuverability and excellent control effect; Make specific proposals and methods to control Huangshan Pine heartwood decay, and the achievement will be used to directly guide the control of heartwood decay of key famous ancient trees.	Nanjing Forestry University	Jan. 2014 – Dec. 2016
Observation of the biodiversity in the Huangshan scenic spot	Set up a 10-hectare permanent sample plot, 2 1-hectare permanent sample plots and 6 1.5-kilometer sample lines to carry out long-term fixed monitoring on biodiversity	Environmental Protection Department of Nanjing Institute of Environmental Science	Apr.2014—Dec.2016

(4) In terms of propaganda and education, the Huangshan Scenic Spot Administrative Committee has organized many activities to propagate and educate the public, tourists and surrounding communities about the concrete measures and contents of Huangshan's biodiversity

in an effort to call for each stakeholder to jointly protect the biodiversity in the Huangshan scenic spot.

2.3 Evaluation of cultural resources

2.3.1 Overview

Mt. Huangshan is located in ancient Huizhou with a long cultural history and rich cultural heritage. Currently, the Huangshan Scenic Spot Master Plan divides its cultural resources into the following three categories: Cliffside inscriptions, historic buildings and museum collections (including intangible cultural heritage, namely myths and legends, Huangshan paintings, poems and pieces of prose, bibliography reservation, list of historical sites, historical events etc.). Among them, Cliffside inscriptions occupy an extraordinarily significant historical status among the tangible cultural heritage in the Huangshan scenic spot, witnessing historical events and historical celebrities in Huangshan, and have great historical values; fully embodying ancient people's talent and Chinese calligraphy soul, these Cliffside inscriptions have important aesthetic values.

According to general survey data of cultural relics, there are 295 Cliffside inscriptions left in Huangshan, found primarily in Hot Spring, Yuping, Beihai, Yungu and Songgu Scenic Spots and on rocks and cliffs along the old climbing routes. The heritage management department continued to accomplish in 2012 the supplement of 3 Cliffside inscriptions, names for 3 rain shelters and couplets for 2 rain shelters, based on the added Cliffside inscriptions in 2011. The department recorded 60 immovable cultural relics and published this year 42 immovable cultural relics (including Huangshan Cliffside inscriptions, Huangshan old climbing routes, Huangshan Pine, etc.) after the third general survey of cultural relics in the Huangshan scenic spot. There are over 150 remnants of ancient structures including ancient roads, stone bridges, old temples, ancient pavilions and ancient tombs. In addition, as for intangible cultural heritage, Huangshan is the cradle of Huangshan Painting School which lasts for hundreds of years, while there are countless pieces of calligraphy, painting and photography with Mt. Huangshan as their themes and more than 20000 poetic writings in praise of Mt. Huangshan throughout the ages..

2.3.2 Conservation status quo

(1) In terms of preservation organization setup, Mt. Huangshan Scenic Spot Administrative Committee has further defined the cultural relic preservation and management tasks of different departments: The Cultural Development Center of the Politics Div. has set up the Cultural Relic Management Sect. and the Museum as the functional bodies for cultural relic preservation,

responsible for the preservation and management of the cultural relics in the scenic spot, the collection of cultural relics and historical records of different historical periods, and the display of world heritage and relics; the Land Planning Div. has set up a heritage office to manage the world heritage in the whole mountain.

(2) In terms of policy support, besides the state- and Anhui province-level cultural relic preservation and management regulations, the Huangshan Scenic Spot specially formulated “Interim Regulations on the Preservation of Cultural Relics in the Huangshan Scenic Spot” on September 21, 2006 to direct and regulate the preservation of internal cultural relics of the Huangshan Scenic Spot.

(3) In terms of cultural relic identification, there are 4 provincial key units of cultural relic protection in the Huangshan Scenic Spot (Mercy light pavilion, Billows loft and Tower for watching waterfalls, Cliffside inscriptions, and Ancient lookout pavilion). The old climbing routes, ancient structures and Cliffside inscriptions in Huangshan are put by the State Council in the seventh batch of national key units of cultural relic protection, a breakthrough of 0.

(4) In terms of long-term monitoring, besides the national general survey and registration of cultural relics, the Huangshan Scenic Spot has conducted a general survey of cultural relics within the scenic spot, supplemented by ongoing manual monitoring. Currently, a list is created of surveyed 668 natural landscapes and 331 cultural landscapes and, combined with the information system construction of the Huangshan Scenic Spot, the electronic general survey database on cultural relics protection is in the process of perfection.

(5) In terms of cultural relic protection and renovation, it's the protection of province-level protection signs.

Currently, costs of the preservation and repairing of cultural relics in the Huangshan Scenic Spot in recent years are summarized as in Table 5 below:

Table 5 Costs of cultural relic preservation and renovation in the Huangshan Scenic Spot (in unit of ten thousands)

	2003	2004	2005	2006	2007	2008	2009	2010	2011
Mercy	3	10	73	/	125	37	/	52	200
Tower for	/	5	/	70	/	/	/	/	/
Lingxi	6	/	/	/	/	/	/	/	/
Songgu	30	/	/	/	/	/	/	/	45

Diaoqiao	/	21	/	/	/	/	/	/	/
Mid-Hill	/	/	/	/	/	70	/	/	/
Other	/	/	/	20		150	32	80	755
Total	39	36	73	90	125	257	32	132	100

Note: 1, the total cost of cultural relic preservation and renovation is 21.26 million Yuan.

2, this year's (2013) expenditures for the cultural relic preservation is 3.42 million Yuan, accounting for 5.62% of the heritage conservation fund.

Source: Cultural Relic Management Sect., Politics Div., Mt. Huangshan Scenic Spot Administrative Committee

(6) The “restoration” of important cultural landscapes focuses always on the heritage policy of “Protection priority, salvage first, rational use, strengthened management”, the increase of special funds and technology investment in cultural relic preservation, and active implementation of cultural relic preservation and cultural landscape restoration. And outstanding achievements have been made. Since 1990s, the completed projects of cultural relic preservation mainly include:

Time	Protection projects of cultural relics
Apr. 2014	On-the-spot investigations of 4 ancient roads, 6 old houses, 1 ancient fortress, 5 ancient pavilions, 12 old bridges, 2 ancient springs, 1 old cave portal, 3 ancient tombstones and some of the Cliffside inscriptions. Complement of historical records of some cultural relics and Cliffside inscriptions. Impurity-clearing protection of the Two Dragons Bridge (North Bridge) built during the Chenghua period of Ming Dynasty (1465-1487). The completion of the project design of renovation of the East and West wings of Mercy Light pavilion entrusted a professional and qualified unit.
2012	Completion of renovation of ancient structures including Mercy light pavilion's roofing, Kitchen and Furong Cave; supplement of 3 Cliffside inscriptions; inscription of names and couplets for two newly built rain shelters; installation of video monitor and fire alarm systems in the collection storeroom of Mercy light pavilion
Apr. 2012	Completion of repairing of Bo'an Master Tower

Dec. 2011	Completion of repairing of Free Life Pond of Mercy light pavilion
Nov. 2010	Completion of roof repairing of ancient architecture of Mercy light pavilion.
Sep. 2009	Completion of four provincial protection like Mercy light pavilion, Ancient Outlook pavilion, Cliffside inscriptions, Billows loft and Tower for watching waterfalls
May 2008	Completion of construction of standard cultural relic storeroom of Huangshan Scenic Spot Museum。
Oct. 2007	Completion of renovation and lightning protection of ancient architecture of Mid-Hill Temple
Aug. 2007	Completion of improvement of lightning protection facilities of ancient architectural complex of Mercy light pavilion
Oct. 2005	Completion of salvage, renovation and surrounding environmental control of historic sites like Gate, Universal Gate tower, Kitchen, and Fayan Spring of Mercy light pavilion
Oct. 2004	completion of repainting and roof repairing of Tower for watching waterfalls
Dec. 2004	Completion of support renovation and surrounding environmental control of ancient architecture of Diaojiao Nunnery
Aug. 2003	Completion of protection and reinforcement of celebrity calligraphy gallery in Mercy light pavilion
July 2003	Completion of excavation and repairing of Lingxi Spring
May 2003	Completion of support renovation and surrounding environmental control of ancient architecture of Songgu Nunnery.
1999	Completion of overall renovation of roofing and wooden structure of ancient architecture of Vairocana Hall
Nov. 1995	Completion of overall renovation and environmental control of Tower for

	watching waterfalls。
1991	Completion of support renovation of ancient architecture of Vairocana Hall

2.4 Environmental protection indicator monitoring

Table 6 Monitoring indicators and results of environmental protection

Key topics	Indicators	Frequency	Departments	Means	Monitoring results in this survey
Aquatic environment	1.Conformance to standard of surface water quality	1 year	Environmental protection office of the scenic spot	Routine work of Eco-environment monitoring station	Surface water: water quality monitoring data in 2012: better than national GB3838-2002 Class I standard; the quarterly-monitored surface water in 2013 met the national standard of surface water quality GB3838-2002 II , 100% qualified. Spring water: the monitoring in 2008 with good water quality.
	2.Conformance to standard of drinking water quality	1 year	Environmental protection office of the scenic spot	Entrusted to Huangshan Municipal Environmental Monitoring Station	The quality of drinking water from the reservoirs of Mt. Huangshan scenic spot reaches 100% of attainment rate.

	3. Annual domestic sewage treatment capacity and peak daily treatment capacity in season	11 years	Sewage management station of the scenic spot	Routine work	The annual total volume of treated domestic sewage could totally reach 700,000 tons, with a peak capacity of 2700 tons/day in season (generally referred to “May Day” and “National Day of PRC”), and the average yearly total wastewater is above 50,000tons.
Acoustic environment	4. Conformance to standard of domestic and traffic noise	11 years	Environmental protection office of the scenic spot	Entrusted to Huangshan Municipal Environmental Monitoring Station	No update. Only monitoring data in 2006 is available. For details, refer to 2.5.
Atmospheric environment	5. Conformance to standard of fair quality	11 years	Environmental protection office of the scenic spot	Automatic continuous air monitoring system	Air quality in Mt. Huangshan in 2013 was better than national Class I standard, with the annual average of SO ₂ , NO ₂ , CO and PM ₁₀ far below the national Class I standard.
Solid waste	6. Annual output of solid waste	11 years	Environmental sanitation authority	Routine testing	Annual output of solid waste in 2013 reached 4289.27 tons.
	7. Methods of waste disposal	15 years	Environmental sanitation authority	This project	The modes of disposal include incineration, biological treatment, land filling, waste recycling and organic waste recycling; hazardous waste is separately collected, transported, stored and disposed.
	8. Proportion of recycled waste to total waste	11 years	Environmental sanitation authority	This project	The total waste recycled in 2013 reached 400 tons, accounting for 9.33% of the total waste.

Source: Sorting by collected survey data

To comprehensively implement the spirit of the Eighteenth Party Congress, the Third Plenary Session of the Eighteenth Central Committee of the Communist Party and the video and teleconference of national special action of environmental protection, Mt. Huangshan Scenic Spot Administrative Committee agreed and passed “2014 Mt. Huangshan Scenic Spot Eco-environmental Monitoring and Environmental Protection Special Action Plan” to continue with the environmental protection special action, advance eco-environmental monitoring and effectively resolve pronounced environmental problems that harm people’s health and hinder sustainable development.

2.5 Aquatic environment evaluation

2.5.1 Surface water quality

The Huangshan Scenic Spot is a state-level scenic spot. According to the criteria for water functional partition in the Environmental Quality Standard for Surface Water (GB3838-2002) and the measures for Huangshan City’s water functional partition in Document HMEPB [1993] No.38, the national Class II standard applies to surface water resources in the Huangshan Scenic Spot. Currently, the monitoring agency of the scenic spot divides surface water resources in the scenic spot into 3 types of stream water, spring water and reservoir water for monitoring purpose.

On stream water quality monitoring, there are 4 monitoring points in the Huangshan Scenic Spot: Jiulong Waterfall, the main gate of Mt. Huangshan, Songgu Nunnery and Shuanglong Pond in Jiaocun. The monitoring items include pH, dissolved oxygen, ammonia nitrogen, permanganate index and 5-day biochemical oxygen demand (BOD₅), according to which the Aquatic environment quality is subject to time series analysis. From the surface water monitoring data in March, June, August and November in 2013 obtained in this survey, the surface water quality of the Huangshan Scenic Spot is excellent, meeting or exceeding the Class II requirements in the Environmental Quality Standard for Surface Water (GB3838-2002), with an attainment rate of 100%.

On spring water quality monitoring, the scenic spot has 15 springs. According to the analysis of water quality monitoring in 2008 of its 4 major springs (Hot Spring, Mingxuan Spring, Songgu Spring and Fayan Spring), the water quality of springs in the Huangshan Scenic Spot is good.

2.5.2 Drinking water quality

According to Anhui Environmental Protection Regulations and Anhui Environmental Protection Regulations on Urban Drinking Water Source, the scenic spot, since the fourth quarter of 2011, has performed the entrusted monitoring (the monitoring unit is Huangshan Municipal Environmental Monitoring Station) with Wuliqiao reservoir, Yungu reservoir, Tianhai reservoir and Xihai reservoir as its monitoring targets, and issued the corresponding results timely, to better conduct the protection and monitoring of drinking water sources in the scenic spot.

This research collects the quality monitoring results of 4 reservoir drinking water sources, which show that drinking water quality in Huangshan Scenic Spot achieves an attainment rate of 100%. For details, refer to 2.5.

Table 7 2013 water quality monitoring result of drinking water sources (unit: mg/L, except for PH)

Monitoring point	Time range	Dissolved oxygen ≥ 6	PH 6-9	Potassium permanganate index ≤ 4	Amm onia nitrogen ≤ 0.5	Total phosphorus ≤ 0.025	Fluoride ≤ 1.0	Volatile phenol ≤ 0.002	Petroleum ≤ 0.05	Feces coliform group (个/L) ≤ 2000
Wuliqiao Reservoir	The first quarter	9.81	6.76	0.6	0.025 (L)	0.01 (L)	0.14	0.0003 (L)	0.03	10(L)
Yungu Reservoir		9.72	6.55	0.6	0.030	0.01 (L)	0.14	0.0003 (L)	0.03	10(L)
Tianhai Reservoir		9.56	6.69	1.6	0.103	0.01 (L)	0.09	0.0003 (L)	0.03	20
Xihai Reservoir		9.67	6.33	0.7	0.036	0.02	0.07	0.0003 (L)	0.04	20

Wuliqiao Reservoir	The second quarter	6.51	7.21	2.51	0.112	0.02	0.69	0.0003(L)	0.04	10(L)
Yungu Reservoir		—	—	—	—	—	—	—	—	—
Tianhai Reservoir		6.42	6.84	3.44	0.195	0.02	0.22	0.0003(L)	0.04	880
Xihai Reservoir		6.87	7.10	3.31	0.176	0.02	0.26	0.0003(L)	0.04	131
Wuliqiao Reservoir	The third quarter	7.15	6.91	1.97	0.129	0.02	0.96	0.0003(L)	0.03	109
Yungu Reservoir		7.15	7.05	1.68	0.158	0.02	0.49	0.0003(L)	0.03	20
Tianhai Reservoir		6.42	7.11	2.90	0.344	0.023	0.33	0.0003(L)	0.04	1296
Xihai Reservoir		6.79	6.98	2.44	0.231	0.02	0.21	0.0003(L)	0.02	132
Wuliqiao Reservoir	The fourth quarter	8.58	7.18	1.10	0.078	0.01(L)	0.17	0.0003(L)	0.03	10(L)
Yungu Reservoir		8.49	7.03	1.10	0.083	0.01(L)	0.07	0.0003(L)	0.02	10(L)
Tianhai Reservoir		8.05	6.99	2.07	0.211	0.01(L)	0.05(L)	0.0003(L)	0.04	10(L)

Xihai Reservoir		8.24	7.1 8	1.71	0.152	0.01 (L)	0.05(L)	0.0003 (L)	0.02 (L)	10(L)
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Note: 1. It means below detection limit;

2. During the sampling period in the second quarter, as the clearing away of silt was underway at Yungu Reservoir, sampling was not available so there is no data on Yungu Reservoir in the second quarter monitoring here.

In general, all water quality samples from drinking water sources in the scenic spot in 2013 were sent to Huangshan Municipal Environmental Monitoring Station for testing. According to the article 14 of the Anhui Environmental Protection Regulations on Urban Drinking Water Source, water quality in first-grade Huaning protection zone for domestic and drinking water sources can use the national Environmental Quality Standard for Surface Water II standard. The testing results show that the entrusted testing project achieved an attainment rate of 100%.

2.5.3 Sewage treatment

In terms of domestic sewage, 13 sewage treatment facilities have been built in the scenic spot since 1986: Yuping, Xihai (currently under construction), Hot Spring, Mid-Hill Temple, the Scenic Spot Administrative Committee building, the Emergency Center, Tianhai, Beihai, Shilin, Yungu New Cableway, Yungu, Songgu, and Furong Ridge (currently under construction), with a designed daily treatment capacity of over 7,000 tons. These facilities have been being upgraded and improved gradually. To date, the improvement of 3 facilities (Tianhai, Hot Spring and Yuping) has been completed, realizing automatic control and 24-hour video monitoring. The sewage discharge standard of Yuping and Hot Spring facilities has been increased to Class I, Grade A standard in the Discharge Standard for Municipal Wastewater Treatment Plant (GB18917-2002).

2014 Mt. Huangshan Scenic Spot Eco-environmental Monitoring and Environmental Protection Special Action Plan published in 2014 demands to strictly enforce Law on Prevention and Control of Water Pollution, strengthening the check of hidden risks for drinking water sources protection zones and remedying hidden dangers for environmental pollution and safety which may affect the water quality of domestic and drinking water source protection zones to ensure the water environment safety, and publish water environment quality for drinking water on a regular basis.

The data provided by the sewage management station of the scenic spot in 2013 shows that the total water supply was 700,000 tons and annual domestic sewage disposal totaled 500,000 tons (2014). The daily disposal peak was 2,700 tons/day in high season (generally referred to “May

Day” and “National Day of PRC”). In 2012, it is planned to build new reclaimed water facilities in integrative reconstruction project of Hot Spring

2.6 Acoustic environment evaluation

Noise in the Huangshan Scenic Spot comes from hotels, restaurants, stores, cultural and recreational facilities, residents’ living and vehicle running, can be divided into domestic and traffic noise.

In terms of noise control, two measures can promote noise monitoring and control in the scenic spot: 1) In September, 2004, New State Line Tourism Passenger Transport Co., Ltd. was founded in the Huangshan Scenic Spot, and private vehicles and minibuses are prohibited from entering the scenic spot, further improving the traffic noise; 2) The monitoring station of the Huangshan Scenic Spot started noise monitoring in 2005.

Environmental Protection Office of Huangshan Scenic Spot entrusted Environmental Monitoring Station of Huangshan City to monitor traffic noises at 4 points and regional noises at 11 points on June 20, 2006, and the results show that, “Traffic noise at all points meets the standard, while regional noise at Yungu Temple and Yuping House exceeds the standard, with figures of 3.5dB (A) and 0.9dB (A) respectively, caused by loudly-talking tourists in the scenic spot”.

2.7 Atmospheric environment evaluation

Huangshan Mountain is labeled “the First Mountain of Human Ecology” by Geping Qu, senior adviser for the Global Environment Facility. The World Health Organization defines “fresh air” standard as 1000-1500/cm of negative oxygen ions in the air. Statistics from the eco-environmental monitoring station of Mt. Huangshan Scenic Spot show that negative oxygen ions in the scenic spot remain above 20,000/cm every year, and the highest monthly content of negative oxygen ions is 27.460/cm in February, 2014. The momentary peak recorded reaches up to 267.100/cm, 267 times the “fresh air” standard by WHO.

Ambient air quality monitoring in Mt. Huangshan Scenic Spot began in 1988, done completely by manual sampling and analysis and with only 3 monitoring indicators—TSP, NO₂ and SO₂ in the early stage. The scenic spot began to build an automatic and continuous air monitoring system in early 2004 and completed it at the end of September. The 2013 monitoring data got in this survey put in Table 8 below shows that the ambient air quality in Mt. Huangshan Scenic Spot

is up to Class I, Ambient Air Quality Monitoring Standard(GB3095-2012)

Table 8 Statistics of air quality in Mt. Huangshan Scenic Spot(Unit: mg/m³)

Monitoring period	Pollutant	Annual average	National standards of annual average (Grade I)
2013	SO ₂	11	20
	NO ₂	8	0.04027
	PM ₁₀	27	0.02406
	CO	1.627	4
	PM _{2.5}	15	15

(National primary standard: unit for CO is mg/m; unit for SO₂, NO₂, PM₁₀ and PM_{2.5} is ug/m³)

Source: Eco-environmental monitoring station of Mt. Huangshan Scenic Spot

2.8 Solid waste disposal

Compared with cities, the annual output of solid waste in the Huangshan Scenic Spot is low and remains stable. Annual fluctuation in output derives chiefly from the amount of construction waste produced in development and construction and the change in number of tourists entering the mountain. In Mt. Huangshan, solid waste is found primarily in 3 areas – near tourist paths, hotels, guesthouses and other places of business, and living district of workers.

To improve the scientific and innocent level of organic waste disposal in the scenic spot and guarantee substantive progress in waste leaving mountains, the environmental protection special action plan prescribes:

(1) Introduce biological kitchen-waste treatment process, promote classified collection of organic waste from hotels and advance quantity reduction treatment of organic waste in the scenic spot.

(2) Make standard cleaning and innocent treatment of grease trap residue in the scenic spot experimental unit to put in motion a comprehensive process of perishable organic waste leaving mountain including “two dregs and one mud”, and put an end to pollution and damages by landfill on the ecosystem including soil, water and vegetation.

(3) Improve waste and old materials in the core scenic spots and severely punish such violations of the law as discharge in violation of regulations and destruction of eco-environment in the scenic spot.

(4) Conduct a comprehensive investigation on waste and old materials around buildings, construction sites, on both sides of tourist paths and among trees, specify accountability units and urge the removing and clearing of waste according to the requirements of “the three steps” (remedy one batch promptly, reform one batch gradually and remedy one batch as a priority).

Currently, a strict classification for solid waste is being carried out in the Huangshan Scenic Spot: Hazardous solid waste is separately collected, transported and stored by the environmental sanitation authority and other authorities concerned according to a strict hazardous waste management system depending on its types (medical waste, waste transformers, waste chemicals, waste ink cartridges and disused batteries); common solid waste is divided into construction and domestic waste, where construction waste is subject to a strict system of declaration, supervision and acceptance, and an array of measures have been taken for domestic waste, including reduction, recycle and safe treatment (sophisticated treatment system). The major measures include:

(1) A purchasing and distribution center has been established to deliver clean food up into the mountain, especially vegetables, poultry and aquatic products which needs cleaning, processing and washing before being transported up to the mountains, and reduce waste output;

(2) All waste must be bagged (bag rate is 100%) to reduce secondary pollution, and the waste classification system has been strengthened and promoted from the very beginning to the whole process;

(3) Routine cleaning is done manually, and the ropeway is used to carry waste during the peak period for traveling;

(4) A special environmental sanitation plan has been developed to implement comprehensively the “external disposal of internal waste” project.

Based on the statistical data of 2008-2010, solid waste in the scenic spot is primarily domestic waste, with an annual output of about 4,000 tons; annual solid waste output in 2012 reached 4766.08 tons. In 2013 this number is 4289.27 tons down by 10%. Disposal methods have been optimized as out-of-mountain disposal of all waste (only a little is by means of microbial

decomposition or biodegradation), transporting to the garbage disposal area in Huangshan city (landfill, combustion insitu and recycling); recycled waste totaled about 400tons, accounting for 9.33%, the recycling results obvious while still with a lot of room for improvement.

3 Tourism and Community

3.1 Community monitoring indicators

Based on the previous surveys, basic indicators monitoring for tourism and community have been perfected, combined with UNWTO's indicator methods, the Huangshan Scenic Spot General Plan and the actual conditions of tourism development in Mt. Huangshan Scenic Spot, as shown in Table 9.

Table 9 Monitoring indicators and results of tourism and community

Key topics	Indicators	Frequency	Means	Monitorin
Community basic information	1. population (locals and	3 years	Statistics	
	2. acreage and administrative districts(proportion to villages adjoining Mt. Huangshan Scenic	3 years	Statistics	Refer to 3.2.1 for details.
	3. Variation of average per capita amount of	2 years	Statistics	Refer to 3.2.1 for details
	5.Village-run enterprises and foreign capital introduction	2 years	Statistics and research	Refer to 3.2.3 for details
Communities economic development and loss	6. Employment situation of	2 years	Statistics and research	Refer to 3.2.3 for details
	7. Number of scenic spots	1 year	Statistics	Refer to 3.2.3 for details

	8. Number of residential facilities	1 year	Statistics	Refer to 3.2.3 for details
	9. Number of tourists received	1 year	Township governments	Refer to 3.2.3 for details
	10. Overall impacts of tourism on local communities	2 years	Questionnaire, interviews and field work	Refer to 3.4 for details
Community environment and resource protection	11. Village	2 years	Questionnaire, interviews and field work	Refer to 3.3 for details
	12. waste			
	13. Sewage			
	14. Forest			
Community construction and community relations	15. Infrastructure	1 year	Questionnaire, interviews and field work	Refer to 3.4 for details
	16. Community people's livelihood			
	17. Mental outlook			
	18. Community relations			
Residents' attitude and perception of impacts	19. Residents' perception of economic, social and cultural impacts of tourism	1 year	Questionnaire, interviews and field work	Refer to 3.4.2 for details
	20. Community residents' overall attitude towards			Refer to 3.4.1 for details

	21.Relative problems about tourism			Refer to 3.4.5 for details
	22.Community residents' perception of the concept of			Refer to 3.4 for details
	24.Community residents' perception of their involvement in tourism	1 year	Random survey of questionnaire in this project; interviews	Refer to 3.4.3for details
	25.Community residents' perception of the concept of	1 year	Random survey of questionnaire in this project; interviews	Refer to 3.4.3 for details
	26.Relative problems about tourism development concerned by	1 year	Random survey of questionnaire in this project; interviews	Refer to 3.4.5 for details

According to the indicators listed in the above table, the monitoring results of community will be summarized below in five aspects: developmental level, environmental conditions, residents' attitude and perception of the impacts, development of small enterprises in the community and Huangshan's residents' perception of brands.

3.2 Development level of four towns

3.2.1 Basic information

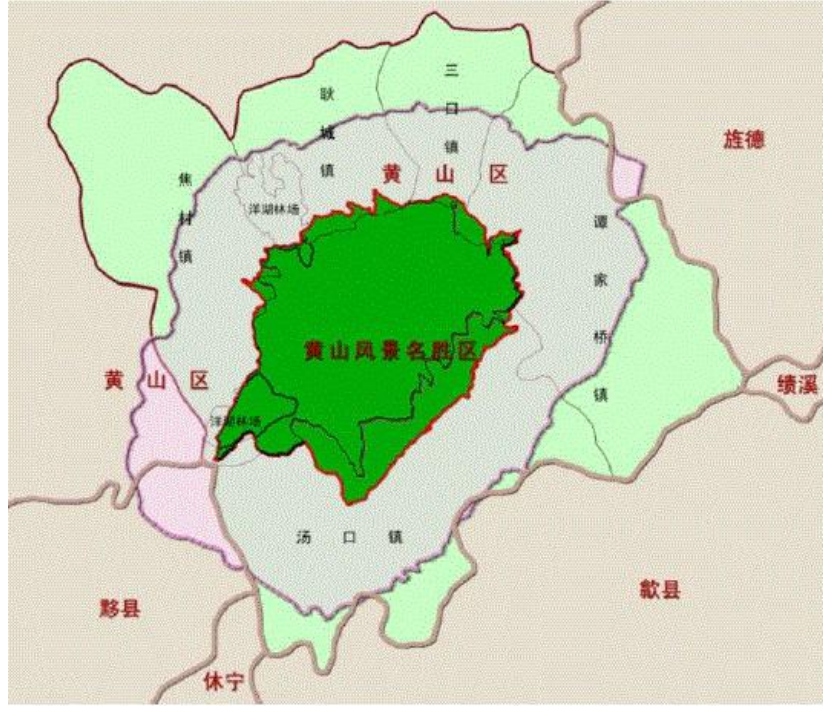


Figure 1 Map of Mt. Huangshan Scenic Spot and its adjacent township

Source: 2007-2025 Mt. Huangshan Scenic Spot General Plan

According to Mt. Huangshan Scenic Spot General Plan (2007-2025), it covers 160.6 square kilometers. The buffer zone includes its adjacent five towns and one farm, i.e. Tangkou, Tanjiaqiao, Sankou, Gengcheng and Jiaocun Towns and Yanghu Forest Farm (See Figure 1). Tangkou, Tanjiaqiao, Gengcheng and Jiaocun Towns are the monitoring case in this project.

Table 10 shows the basic information of the four towns: population, acreage, regional scale, administrative villages adjacent to Mt. Huangshan Scenic Spot as well as sites of the town governments.

Table 10 Summary of basic information including population and geography of the four towns

Town name	Permanent residents (person)		Acreage (km ²)	Regional scale		Adjacency to Huangshan (A total of 16 administrative villages)	Seat of the government
	Local	Outsider		Administrative village	Villager group		
Tangkou (South)	15755	4733	129.35	5	74	Shancha, Tangkou, Zhaixi, Fangcun, and Gangcun	Tangkou Village
Tanjiaqiao (East)	7686		136	4	49	Zhongdun, Xinhong, and Changluo Villages	Zhongdun Village
Gengcheng (North)	8890		85.8	5	51	Chenglan, Fucun and Goucun	Jinqiao Village
Jiaocun (West)	14765		259	14	107	Zhangcun, Liucun, and Tangliu	Chencun

Source: sorting by collected survey data.

The above table shows such basic information as population, acreage, regional scale, administrative villages adjoining Mt. Huangshan Scenic Spot and sites of governments of the four

towns. As can be seen, Tangkou Town has most local and non-local residents and the highest proportion of outsiders to permanent residents, which reflects the unique geographic situation of Tangkou Town—at the South Gate of Mt. Huangshan, with all its administrative villages adjoining Mt. Huannshan, it has the closest association with Mt. Huangshan. Largest of the four town, Jiaocun Town is also the biggest organic town in area and agricultural population in Huangshan area.

3.2.2 Status quo of agricultural economic development

Table 11 Statistics of agricultural economic development of the four towns

Town name	Major industries	Annual per-capita net income of farmers
Tangkou	Farming, forestry (wood, bamboo, tea, etc.), tourism	12374(2012)
Tanjiaqi	Farming, forestry (wood, bamboo, tea, etc.), migrant work	11690(2013)
Gengche	Farming, forestry (wood, bamboo, tea, etc.), migrant work	9592
Jiaocun	Farming (wood, bamboo, tea, delicacies, etc.), poultry industry and migrant work.	12490(2013)
		10958(2013)

Source: collection by the research group through interviews

Table 11 shows the status quo of agricultural economic development of the four towns surrounding Mt. Huangshan Scenic Spot. Tangkou's per-capita net income of farmers in 2013 is not available, while the other three is in 2013. It can be seen from the data that, Tangkou's per-capita net income of farmers in 2012 is already higher than Tanjiaqiao' and Jiaocun' in 2013 and little higher than Gengcheng's in 2013. Due to its great location, Tangkou Town features earlier and more mature tourism development than the other three towns, as well as higher economic development level and higher annual per-capita net income of farmers. The other three towns' economic levels are close, Jiaocun Town a bit backward, and all show a relatively strong growth in 2012.

Tangkou Town possesses more mountains and fewer lands, with a total woodland area of 11,142.77 hectares, garden plot of 1091.42 hectares and farmland of only 156.33 hectares. In agriculture depends primarily on tea planting, along with tea seed, *Torreya grandis*, bamboo shoot and other productive agricultural products. Forestry relies mainly on bamboo planting which is extending year by year. Besides, there are some tea processing factories and farms mainly raising pigs. Due to less farmland and some of it unfavorable, Tangkou Town's planning is weak. Its major crops being rice, corn, potato, rapeseed, etc. and can not support itself.



Picture 2 Cornfield in Gangcun

Tanjiaqiao Town's leading industry is agriculture, then tourism. Rice is the main crop, supported by dry rice and coarse cereals including wheat, corn, potato, buckwheat, sorghum and bean; and it features producing tea, bamboo and timber, and even mulberry field raising silkworms in Xinhong Village. Farmers raise chickens, ducks and geese, together with pigs and cows. Nowadays, tea has become the leading industry in Tanjiaqiao Town.

Gengcheng Town's farmers mainly raise rice, tea and bamboo. Due to its reducing and little arable land, agricultural income comes largely from operating incomes of forest land and husbandry. On the whole, income from forestry is higher than that of farming. Forest land is an important source of collective income so far. From interviews with some residents, it is found that they have no difficulty in supporting themselves in spite of not enough farmland. Fruit from the forest land are primarily sold to the surrounding local markets, while timber and bamboo receive preliminary processing there before selling.

Jiaocun Town is an organic town being biggest in area and agricultural population in the

Huangshan District. Longyuan village, at the center of Jiaocun Town, focuses on agricultural crops including rice, rape, watermelon and herb of stringy stonecrop. In recent years, in line with the readjustment of industrial structure, special agricultural edible fungi have been cultivated, and specialized rural cooperatives have been established. The town has more farmland, mainly raising rice, and chickens and ducks are seen often. Affected less by tourism, villagers there basically think that tourism has not been developed in Jiaocun Town, with little hope of developing tourism.

Summary: Overall, the major agricultural products of these four towns are rice, tea and bamboo. Their food-planting is based on rice and can be self-sufficient on rice except for Tangkou Town. Forest coverage in these four towns is high, and forestry depends mainly on tea planting and bamboo cut from mountain farms; bamboo is basically sold to large enterprises in urban area and the scenic spot, and tea purchased and processed by tea plants, is transported to tea trading markets in Gantang Town where Huangshan District government is located for sale.

From the research, the villages and towns focus respectively on many agricultural and forest products combined with their own resources advantages. From the supply chain, except some left for the purpose of self-sufficiency, most of products are sold across the whole Huangshan City and its surrounding provinces and cities through trading markets in Huangshan District.

3.2.3 Development of tourist economy

Table 27 Low-mountain attractions and investment projects in buffer zone

Town name	Recent investment projects	Low-mountain attractions	Employment in tourism
Tangkou	9 new projects including Huangshan intercontinental Huizhou-merchant international hotel, Huangshan Hui Dream Valley international resort and hotel groups constructed in old cities; 3 continued projects: Jiulong rural culture and tourism complex project, Tangkou New Town and the second phase project of Jade travel resort. Investment totals 2.591 billion Yuan.	Jade Valley, Jiulong Waterfall, Phoenix Home, Monkey Park, Lucky River scenic area and Fangcun Bamboo Sea	Running attractions, working in Joyous farmer's house and scenic spots, staff in tourism industry including hotels, and jobs in Tangkou travel service companies and New State Line Tourism

ao	20 projects currently under construction including integrated tourism development at Huangshan East Gate, travel resort in eastern Huangshan and Affiliative Valley, the total investment is near 10 billions; 5 new projects in 2013 including comprehensive oil-tea development project, SAIC clubhouse project and Wishful Valley, funds from out of town totals 900 million yuan.	Shimen canyon Travel areas in eastern Huangshan, Scientific hellbender breeding park and the museum on Red Army leading anti-Japanese advance north.	Joyous farmer's house operations, jobs in scenic spots and travel service businesses like restaurants and hotels.
eng	Fucun's Furong Valley and Jianqiao village's Tiger Park, Treasure Park (new project in Fucun), Jinqiao Science and Technology Industrial Park, the hotel resort represented by the five-star taft hotel, "Forest story" residential property by M&R Group, Monitoring base of College of Environment at the People's University of China and Puxi Garden in Jinqiao.	Huangshan Tiger Park (2009), Furong Valley (2007), Treasure Park (new project in Xuxin) and Puxi Garden in Jinqiao.	Joyous farmer's house operations (mainly in Fucun), jobs in scenic spots and travel service businesses like restaurants and hotels.
	Anhua Villa, Xihai Garden, Xifeng Villa, Longsheng Movie and Television Base, Car camping club, and Buddhist cultural theme park	Rail cable car, Cuiwei Temple, Ancient village of Guocun and Jiuhua Peak Nature Reserve	Joyous farmer's houses (there are 60 of them), scenic infrastructure construction, waiters, tour

Source: Interview sorting and Tangkou Town People's Government website
(<http://www.tangkou.gov.cn/>)

It can be seen from the recent investment projects in Table 12 that Tangkou at South Gate and

Gengcheng at North develop best among the four towns. Benefited from the close contact with Mt. Huangshan Scenic Spot, Tangkou Town makes rapid progress in the development of real estate, large holiday inns and other projects, with the optimistic operation of low-mountain attractions and high participation of residents in tourism. Gengcheng Town develops early, due to geopolitical relations with Huangshan District government (adjacent to Gantang Town where the district government seats), and it is based on industry, having primarily some eco-industrial projects. The other two towns, Tanjiaqiao and Jiaocun, introduce less project funds, due to its geographical disadvantage and late development, and its projects move quite slowly. In the past two years, thanks to the construction of Xihai Valley rail cable car and the increasing importance attached to West Gate, projects signed or continuously constructed have increased in Jiaocun Town.

Table 13 Statistics of 2013 tourists received and gate receipts in attractions in buffer zone

Year Attraction	Tourists received (ten thousands)				Gate receipts (ten thousand Yuan)			
	2011	2012	2013	Year-on-year growth	2011	2012	2013	Year-on-year growth
Jade Valley	88.74	116.45	121.6	4.42%	3754.05	5516.91	5558.79	0.76%
Jiulong Waterfall	41.56	54.99	53.6	-2.53%	1003.49	1604.58	1562.68	-2.61%
Phoenix Home	21.51	30.93	27.9	-9.80%	210.61	349.93	309.78	-11.47%
Monkey Park	3.84	5.94	4.9	-17.51%	33.31	65.55	49.53	-24.44%
Lucky River scenic area	—	—	18.7	—	—	—	590.94	—
Fangcun Bamboo Sea	—	—	3.7	—	—	—	111.33	—
Shimen Canyon	21.86	27.12	30.1	10.99%	587.39	813.66	830.65	2.09%
East Huangshan	21.77	27.44	28.8	4.96%	—	—	1331.9	—
Museum on Red Army Leading	—	—	10.4	—	—	—	136.06	—

Anti-Japanese Advance North								
Tiger park	8.02	9.05	——	——	400.35	414.48	——	——
Furong Valley	63.76	78.29	——	——	1634.6 2	1836.4 5	——	——

Source: Sorting by interview information

Table 13 reflects tourists received and gate receipts of low-mountain attractions in buffer zone in 2013. The data above shows that tourists received and gate receipts of some major attractions kept a satisfactory growth in 2012 but increased only a bit in 2013 and even declined, like attractions of Jiulong Waterfall, Phoenix Home, Monkey Park which all lie in Tangkou Town. The reason may be that, with the development of tourism, Mt. Huangshan Scenic Spot's role in driving its surrounding attractions has reached saturation point, so that the number of tourists has reached or approached the summit. Nevertheless, Tangkou Town has more attractions, tourists received and gate receipts than the other three towns, reflecting the unbalanced development of attractions due to their differences in geographical location and resource conditions.

Table 14 Summary of star-level Joyous farmer' s houses in buffer zone of Mt. Huangshan Scenic Spot

	Provincial					Municipal			District			To tal
	5 - s tar	4 - s tar	3 - s tar	2 - s tar	1 - s tar	3 - s tar	2 - s tar	1 - s tar	3 - s tar	2 - s tar	1 - s tar	
Tangkou Town	1	4	1	3	0	8	1	1	2 8	1	0	48
Tanjiaqi ao Town	1	0	2	3	0	0	0	5	0	0	1	12

Jiaocun Town	0	0	3	2	0	0	1	0	0	0	0	6
Gengche ng Town	1	0	1	2	0	0	0	0	0	0	0	4

Source: Huangshan District government website

Table 14 shows the distribution of star-level joyous farmer's houses in the four towns in buffer zone of Mt. Huangshan Scenic Spot, and the quantity and quality of joyous farmer's houses characterize the level of development of a town's tourism. The data in the above table shows Tangkou Town features higher level of tourism development and more tourists received, the obviously higher quantity and quality of its joyous farmer's houses than the other three towns; Tongkou Town has much more joyous farmer's houses than the other three towns put together, and distinctly has more provincial and municipal joyous farmer's houses than the other three towns. In the other three towns, joyous farmer's houses are relatively small in number and more dispersed. Tanjiaqiao Town actively recruit foreign investments and advance the construction of low-mountain attractions in recent years to attract short-range and Huangshan tourist source markets, so it has relatively more joyous farmer's houses. Jiaocun Town is inferior to Tanjiaqiao Town in quantity and quality of joyous farmer's houses, with a low level of tourism development. But with the development of Xihai Valley, it may drive Jiaocun's tourism development and infrastructure construction. Gengcheng Town, with slightly fewer joyous farmer's houses than Jiaocun Town, is growing slowest of the four towns.

Summary: of the four towns in buffer zone of Mt. Huangshan Scenic Spot, Tangkou takes a lead in tourism development, followed by Gengcheng, Tanjiaqiao and Jiaocun towns. Tangkou Town at the South Gate develops its tourism earliest thanks to its excellent geographic location, and benefits deeply and widely from Huangshan tourism in terms of economy.

3.3 Environment in buffer zone

The survey learns about the environment in buffer zone by focusing on the four following aspects of the four towns: village appearance, garbage disposal, sewage treatment and forest conservation.

3.3.1 Village appearance

Generally, a fruitful effect has been obtained in village appearance of the four towns. The construction of roads makes transportation more convenient between different towns and villages, and the renovation of power grid and water networks also improves villagers' life. villages nearer to Mt. Huangshan Scenic Spot are more modern, for example, Zhaixi with shops on both sides of roads almost does not look like a village; while villages farther from it have more of a country style, like Gangcun and Fangcun where crops are growing and poultry and livestock are reared.

Nowadays, villages keep building new houses which, although very different from old houses in style, are built as required: unified Huizhou-style architecture, black and white contrasting finely with each other; unified height of and distance between buildings, neat and uniform. Truly, construction waste disfigures the villages a little. But on the whole, village appearance develops for the better.



Picture 2 a new house being built in Zhenggang village, Tangkou town

Picture 3 a commercial street in Puxi Garden, Gengcheng town.

3.3.2 Waste disposal

For waste disposal, each town has dustbins, garbage cans and garbage disposal sites and the waste will be collected regularly for recovery processing by cleaning staff. For example, Gangcun of Tangkou town hires 8 dustmen to clear off the rubbish in the village and garbage cans and garbage rooms are seen everywhere. It is reported that the waste is mainly of domestic and construction waste and villagers will voluntarily clean up the part of a river before their own door in the rainy season. So, Gangcun by and large is clean.

Besides, what's worth mentioning is that Jiaocun town has put forward a project proposal for a waste transfer station with budgetary funds of 1.39 millions and introduced a batch of waste

treatment equipments; It also intends to put forward a set of policies for waste disposal, build up a contingent of rural cleaners and perfect a batch of waste treatment facilities; It has formulated a sound work system to organize a series of cleaning activities and rate a batch of hygienic villages. All these show Jiaocun town's resolution to improve people's living environment.



Picture 4 a garbage room in Gangcun

3.3.2 Sewage treatment

As for sewage treatment, it can be seen that each of these towns has made progress. In the past, except Jinqiao village under Gengcheng town (uniformly constructed with Gantang town), the other towns did not have sewage discharge systems and discharged sewage directly into streams, causing serious pollution. However, this monitoring finds that each town has sewers and wirings, and the streams look very clean with no pollution. For example, sewage in Gengcheng town is carried through sewers to the district for treatment, and a sewage system is currently under construction in the town; Tanjiaqiao has also established complete drains; according to cadres of Gangcun Villagers Committee under Tangkou town, sewage sources in Gangcun are mainly sewage from toilets, sewage produced from raising livestock including pigs and domestic sewage, and there are sewage treatment plants responsible for treatment of collected sewage. Besides, Gangcun is designing sewage treatment lines under the government support. Villagers interviewed all think that Gangcun does treat sewage and streams and domestic water do not suffer from pollution now.



Picture 5 a crystal stream in Gangcun

The table below is about the control of rivers and lakes and the distribution of special funds in towns in Huangshan: Gengcheng town invests a total of 38.5 million Yuan for a protection project of drinking water sources and two regulation projects of Jiaocun town cost 21 million Yuan. What's more, Tanjiaqiao has no regulation projects for a time, but put forward a "feasibility study report on Tanjiaqiao sewage treatment plants and sewage collection system". It can be seen that each town is vitally concerned about sewage treatment.

Table 15 2014 (Huangshan district) notice of control of rivers and lakes and distribution of special protection funds

Project name	Responsible institution	Total (thousands)	Financial resource		Remark of central funds distribution
			Central funds	Local funds	
Protection of urban drinking water sources (Phase II)	Gengcheng Town	3850	2850	1000	Among : Gengcheng : 2650 ; Agricultural Development Organization: 200
Comprehensive improvement of villages on Yangxi river	Jiaocun Town	810	660	150	Among: Jiaocun : 485; Taiping Lake Town: 175
Comprehensive improvement of villages on	Jiaocun Town	1300	1200	100	Among: Jiaocun: 840; Wushi Town: 360

Shuxi river

Source: Huangshan District Environmental Protection Agency

3.3.4 Forest conservation

16 administrative villages adjacent to Mt. Huangshan Scenic Spot are responsible to undertake an important task of preventing fire and protecting forest every year. Mt. Huangshan Scenic Spot Administrative Committee is related to Administrative Committee Office, Comprehensive Management Office, and Fire Prevention Office of the surrounding towns and villages. According to the interviews, the annual profits and responsibilities for Mt. Huangshan Scenic Spot borne by 16 administrative villages adjacent to Mt. Huangshan Scenic Spot in buffer zone have been sorted out below:

The Administrative Committee gives each village (by the standards of villages before combined) financial subsidies of 20000 to 30000 Yuan every year to carry out fire prevention, e.g. establishment of fire-fighting supply depot, wage payment for fire personnel as well as other day-to-day management. Each town in turn launches a project every year, like infrastructure improvement, road construction and environmental sanitation. Mt. Huangshan Scenic Spot Administrative Committee gives tens of thousand Yuan to villages and towns to do projects every year, according to a compensation of 10 Yuan per mu for thousands of mu of public welfare forest marked off in the surrounding villages by the committee, and does an acceptance check on a regular basis every year.

In 2001, 4-km isolation belt round Mt. Huangshan Scenic Spot was delimited, where residents of the towns and villages concerned cut down all pine trees without any compensation and made a great sacrifice for the prevention of pine wood nematode disease. In recent years, adjacent villages are also responsible for removing any chance of unsafe troubles concerning backpackers who go into the mountains.

Interviews show that forest conservation is mainly about returning farmland to forests and prevention of forest fires. The prevention of forest fires has been mentioned above. As for returning farmland to forests, each town shows active cooperation. Returning farmland to forests is understood to be both the government's and national policy. In interviews in Gangcun, Tangkou town, a villager holds that at first some villagers, thinking that the policy of returning farmland to forests shrinks the little farmland, did not cooperate. He himself does not think the policy right, arguing that paddy fields should not be converted. But there are some villages in support of this policy, such as Fucun of Gengcheng town. According to the introduction from the mayor and

reports from villagers of this village, the farmland has been converted to economic forests which still belong to villagers and have higher economic outputs than farmland. Woodland has not only reaped economic benefits but also resulted in ecological benefits. And apart from the economic output of the woodland, farmland-retuning farmers get living subsidies from the government. However, as farmland gets less and less, the process of returning farmland to forests stops now.

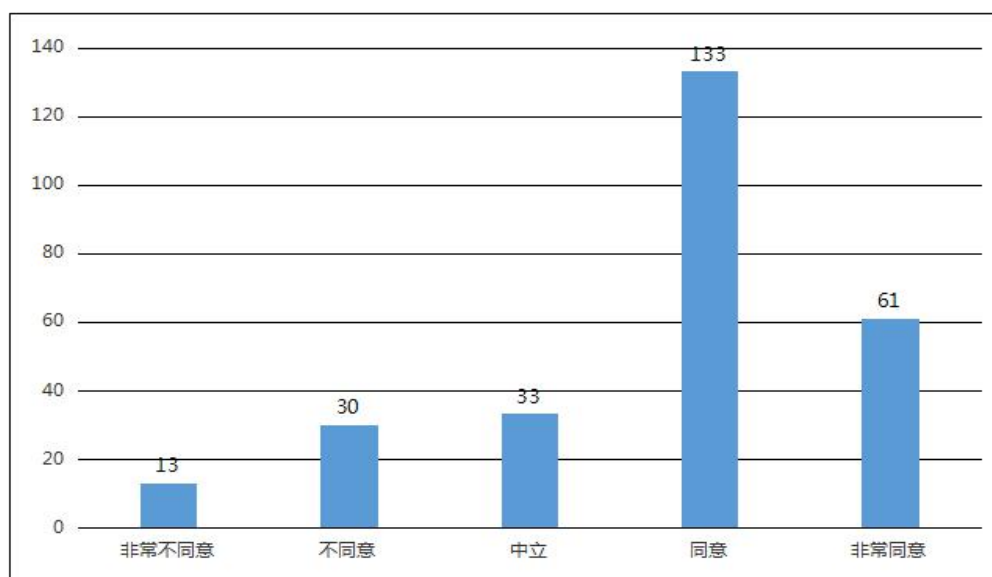
3.4 Residents' Attitudes and perceptions in the buffer

To measure residents' attitudes and perceptions in buffer zone, residents of the five towns in buffer zone of Mt. Huangshan Scenic Spot are monitored mainly through questionnaires, supplemented with non-structured interviews. Among the many investigated villages, emphasis is placed on residents of villages adjoining Mt. Huangshan Scenic Spot. During the research in July, 2014, a total of 270 available questionnaires were issued: Tangkou Town 221 (Central Village 61, Zhaixi 120, Jade New Village (Shancha) 5, Fangcun 19 and Gangcun 16), Gengcheng Town 13, Jiaocun Town 13, Tanjiaqiao Town 10 and Sankou Town 13. Questionnaires to measure attitudes and perceptions of community residents mainly involves the impact of Mt. Huangshan tourism development on the economy, society, culture and environment as well as residents' attitudes, and mainly distributed to villagers of administrative villages with relatively high level of tourism development and where town governments seat. Likert 5-grade scale is used in the design of these questionnaires, i.e. each question in the scale is given a choice of five alternative answers in order of increasing consent, corresponding to 1, 2, 3, 4 and 5. Descriptive statistical analysis is performed on the results of the questionnaires.

In addition, monitors have interviewed relevant government officials of the five towns in buffer zone to learn about the process of investment invitation for tourism, tourism revenue and others in each town.

3.4.1 Residents' overall perceptions and attitudes

From the overall indicators, 71.9% of residents agree or strongly agree that Mt. Huangshan Scenic Spot has contributed a lot to local development. According to the data collected in the five-grade scale, the average value of this indicator is 3.74, suggesting that residents in buffer zone by and large recognize the positive impacts of Mt. Huangshan Scenic Spot on local development.



Picture 6 Agreement on “Mt. Huangshan Scenic Spot has contributed a lot to local development”

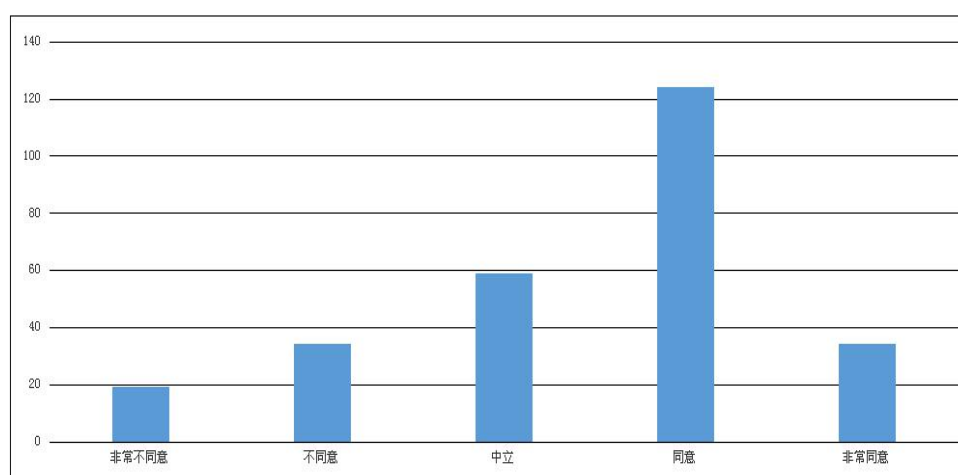
According to data collected from different regions, Gengcheng and Shancha Village (Jade New Village), Tangkou have the highest level of agreement on the contribution by Huangshan Scenic Spot, while Jiaocun and Tanjiaqiao towns have the lowest.

Table 16 Average value of agreement on “Mt. Huangshan Scenic Spot has contributed a lot to local development”

	Gengcheng	Shancha Village	Tangkou					Jiaocun	Tanjiaqiao
Average value	4.23	3.92	3.74					3.38	3.30
			Jade New Village	Tangkou Village	Gangcun	Zhaixi Village	Fangcun		
Average value			4.2	3.80	3.75	3.72	3.53		

58.5% of residents are pleased or highly pleased with the status quo of the development of Huangshan. The data collected in the five-grade scale shows the average value of this indicator is 3.44, suggesting that residents in buffer zone by and large are pleased with Huangshan’s current

development but their satisfaction is not high, having high expectation of the development of Huangshan's tourism in which there is believed to be a tremendous space for further development. According to the data collected from different regions, Gengcheng Town and Gangcun of Tangkou town are most satisfied with Huangshan's development, while Tangkou and Zhaixi villages of Tangkou Town are least satisfied with it. From the supplemented interviews, Tangkou Town adjoining the South Gate of Huangshan, especially Tangkou Village, residents there expect a lot from the development of Huangshan's tourism, while with government planning obvious in the development of Zhaixi Village, Zhaixi villagers, to some extent, seem passive in participating in tourism. What's worse, as Zhaixi is in the process of urbanization, problems caused during community transformation unavoidably affect residents' satisfaction.



Picture 7 Agreement on "Pleased with Huangshan's development"

Table 17 Agreement on "Pleased with Huangshan's development"

	Gengcheng	Sankou	Jiaocun	Tanjiao	Tangkou				
Average value	3.85	3.62	3.46	3.40	3.39				
					Gangcun	Jade New Village	Fangcun	Zhaixi Village	Tangkou Village
Average value					3.81	3.6	3.58	3.36	3.25

3.4.2 Perceptions of economic, social, cultural and environmental impacts of tourism

A questionnaire system is design based on Likert 5-grade scale in this monitoring to measure residents' perceptions of impact of tourism in buffer zone on four types of indicators: economy, society, culture and environment. The indicators with the highest average values of perceptions and approval rates are "Tourism development boost local economic development", "Tourism development improve roads and supply of water and electricity" and "Tourism development increases the pulling down of old houses to build new ones", with average values of perceptions all higher than 3.9 and approval rates all above 80%. The indicators with lowest average values of perceptions and approval rates are "Tourism development improves medical facilities", "Tourism development improves educational conditions", "Tourism development leads to the damage and oblivion of folklore and culture" and "Tourism development brings more air pollution", with approval rates all below 45% and average values of perceptions lower than 3.3. Specific results are as shown below.

Table 18 Measurement result of perceptions of tourism impacts

Indicator	Average value	Standard deviation	Approval rate
Perceptions of impact on economy	3.78	0.983	
Tourism boost local economic development	4.03	0.922	86.30%
Tourism development rises prices	3.88	0.977	72.60%
Tourism development widens the gap between the rich and poor	3.78	0.858	67.40%
Tourism development promotes employment	3.43	1.067	58.50%
Perceptions of impact on society	3.612	1.019	
Tourism development increases the pulling down of old houses to build new ones	4	0.873	85.60%
Tourism development improves roads and supply of water and electricity	3.9	0.848	80.40%
Tourism development leads to traffic congestion	3.69	0.931	61.10%
Tourism development improves educational conditions	3.29	1.04	43.30%

Tourism development improves medical facilities	3.18	1.113	40.70%
Perceptions of impact on culture	3.43	0.993	
Tourism development enhances cultural exchanges between the local and foreign	3.78	0.871	73.30%
Tourism development increase local festivals and riches everyday activities	3.44	1.001	54.40%
Tourism development leads to damage and oblivion of folklore and culture	3.07	0.977	33.30%
Perceptions of impact on environment	3.55	1.008	
Tourism development leads to an increase in litter	3.8	0.98	76.30%
Tourism development improves environmental hygiene	3.76	0.871	74.40%
The foundation of natural reserve plays a significant role in environmental education and conservation of biodiversity.	3.66	0.847	67.00%
Tourism development reduces killing of animals and hewing of plants by villagers	3.51	1.064	61.10%
Tourism development leads to water pollution	3.5	1.069	58.90%
Tourism development leads to an increase in noise	3.48	1.026	59.60%
Tourism development brings more air pollution	3.13	1.034	38.50%

(1)Economic impact:

The collected data about residents' perceptions shows that tourism development in Mt. Huangshan Scenic Spot has, to some extent, promoted the economic development in five towns in buffer zone and increased job opportunities locally, but such problems as rising prices and widened gap between the rich and the poor have emerged at the same time. On the whole, up to 86.3% of community residents affirm the contribution of tourism to local economic growth. 58.5% of residents hold that tourism development also brings about more job opportunities, which is lower than that of last year. However, most of residents who hold this view do not deeply feel the change

but think for granted that tourism development promotes employment. And many young people both locally and from adjacent areas express their difficulty, in varying degrees, in finding jobs. Besides, 21.5% of residents (mainly the young) in this monitoring consider getting a job as their greatest difficulty facing them in current life.

Table 18.1 Measurement results of perceptions of economic impact of tourism

Indicator	Average value	Standard deviation	Approval rate
Perception of impact on economy	3.78	0.983	
Tourism boosts local economic development	4.03	0.922	86.30%
Tourism sends prices up	3.88	0.977	72.60%
Tourism development widens the gap between the rich and poor	3.78	0.858	67.40%
Tourism development promotes employment	3.43	1.067	58.50%

72.6% of residents agree or strongly agree that tourism sends prices up locally, up a little compared to last year. 30.0% consider prices as the greatest difficulty in life, especially in Tangkou Town where people complaints that the developing tourism and increased tourists send prices up and consequently increases their financial burden as ordinary peasants and grassroots workers do not have their wages increased accordingly. What's more, 67.4% agree or strongly agree that "Tourism development widens the wealth gap among local residents", but when asked about the concrete manifestation of the widening gap between the rich and the poor, few of residents can speak clearly with their relatively obscure perceptions of this concept.

(2)Social impact

First investigated is the role of tourism development in improving roads, supply of water and electricity and other facilities and in promoting demolition and new buildings in five towns in buffer zone of Mt. Huangshan Scenic Spot. The data shows, 80.4% of residents agree that tourism development has improved roads, hydropower and other facilities. 85.6% think it also leads to demolition of old houses and increased new buildings, up about 6% over last year. Construction of roads is one of the manifestations of urbanization for many villages; many villages which were backward in the five towns in buffer zone now have built wide roads and consequently attract more investment. But it also brings about new traffic problems. 61.1% of residents agree that tourism makes traffic heavier, up 8% over last year. In a way, tourism development makes traffic

congestion worse.

Table 18.2 Measurement results of perceptions of impact of tourism

Indicator	Average value	Standard deviation	Approval rate
Perception of impact on society	3.612	1.019	
Tourism development increases the pulling down of old houses to build new ones	4	0.873	85.60%
Tourism development improves roads and supply of water and electricity	3.9	0.848	80.40%
Tourism development leads to traffic congestion	3.69	0.931	61.10%
Tourism development improves educational conditions	3.29	1.04	43.30%
Tourism development improves medical facilities	3.18	1.113	40.70%

Compared to impact on other aspects, tourism development plays a weak role in improving local medical conditions. Only 40.7% of community residents agree or strongly agree that the medical condition has been improved, even down by 12% from 52.6% of last year monitoring, and nearly half of them review this unfavorably. From the average value 3.18 in the 5-grade scale, generally residents are neutral in the impact on medical conditions. According to the information collected during interviews, most of residents hardly feel the improvement of medical condition. During the interviews, monitors learn that although a medical emergency center is set up in Mt. Huangshan Scenic Spot, it is more for tourists and staff, and as for local residents, they seldom go there. Overall, tourism has little impact on medical conditions for residents in the five towns, and local residents say that they usually go to clinics and small hospitals in the neighborhood for slight illness, and for serious illness, they go to hospitals in Tunxi or further. And so is the case with some other places where there are perfect tourism facilities and yet lack of medical facilities, like Zhaixi Village in Tangkou Town. Quite a lot of residents are seen to complaint that the medical conditions can not meet the needs of communities. It is one of the features of a tourism-oriented community that its function for serving the community itself is not perfect which hinders the rising of the living standard of local residents.

Tourism has a much weaker impact on education, i.e. only 43.3% of residents agree that education has been improved. As interview results show, quite a number of residents don't think tourism development drives the improvement in education, and 20.4% of residents don't think there is any improvement in education. According to the interview results, residents say that children go to primary school and junior high school in the neighborhood which do not have high standards of teaching, but for senior high school, they still have to go to other districts or counties. As Mt. Huangshan tourism develops, the surrounding governments pay less attention to education input for community residents. It is also reflected by what residents in various towns say about the number of trainings or lectures about environmental education and biodiversity conservation: 79.6% of residents say there is no such trainings or lectures or that they don't know there is any; only 3.7% believe that there are many lectures of this kind but, as monitors had further talk with interviewees on the questionnaire, they found that actually these people misunderstood the question and take government signs like "No littering" and "Protect forests and prevent fires" for this kind of trainings or lectures. In fact, these local residents lack access to trainings on environmental education and biodiversity conservation.

(3) Cultural impact

The measurement results of all indicators this year differ little from that of last year. 73.3% of villagers agree or strongly agree that tourists and migrant workers contribute to cultural exchanges between the local and outside. However, during the interview, most residents express that rushing tourists actually have little profound cultural exchanges with local residents. Besides, along with tourism development and cultural exchanges, some festival activities are also created in Huangshan. In this survey, 54.4% of residents agree that tourism development has increased festival activities and enriched the life of local villagers, such as Valentine's Day activities in Jade Valley and Rape Flowers Festival in Sankou Town, etc. It is also found that residents who are neutral or in disagreement with this issue seldom pay attention to or take part in local festival activities themselves. Residents' perceptions of the negative impact of Mt. Huangshan tourism on traditional culture of the five towns is weak, with an average value of agreement only 3.07 and only 33.3% of residents think that "Huangshan tourism development leads to damage and oblivion of local folklore and culture". But more residents consider that there, actually, are no special and unique folk customs and traditional activities there. Residents' awareness and protection of local uniqueness are limited.

Table 18.3 Measurement results of perceptions of impact of tourism

Indicator	Average	Standard	Approval rate
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	value	deviation	
Perceptions of impact on culture	3.43	0.993	
Tourism development enhances cultural exchanges between the local and foreign	3.78	0.871	73.30%
Tourism development increase local festivals and riches everyday activities	3.44	1.001	54.40%
Tourism development leads to damage and oblivion of folklore and culture	3.07	0.977	33.30%

(4)Environmental impact

The negative impact of Mt. Huangshan tourism on the environment of the five towns in buffer zone is mainly reflected in increasing garbage and water pollution; 76.3% of residents believe that tourism development brings not only plenty of tourists, but more garbage. When it comes to garbage disposal, 71.1% of residents say there are garbage disposal areas in neighborhood communities, but quite a lot of them expose that these areas have poor disposal capabilities or inappropriate treatment. 58.9% of people consider that local water is contaminated, the raw sewage being sluiced directly into streams and turn the water quality bad or even contaminated. And it not only affects the water environment in local towns and villages, but also influences areas at the downstream. For example, the water quality in Machuan River in Tanjiaqiao Town, influenced by the water pollution of Tangkou Town upstream, turns bad. In addition, next come noise and air pollution. 59.6% of residents, almost the same as that of last year, agree that tourism development causes more noise. Residents reported that noise comes mainly from the increased motor vehicles on the road and road construction and housing projects; 38.5% of residents believe that the air is polluted, a decrease of over 9 percentage point from 47.7 % of last monitoring. From the interviews, residents in buffer zone are satisfied with the local air quality. Many residents say although tourism development brings more tail gas pollution, the air is satisfactory in these mountains. Worth mentioning, only 5.56% of residents express their dissatisfaction with Huangshan natural and living conditions through the multiple-choice questions.

Table 18.4 Measurement results of perceptions of impact of tourism

Indicator	Average value	Standard deviation	Approval rate
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Perceptions of impact on environment	3.55	1.008	
Tourism development leads to an increase in litter	3.8	0.98	76.30%
Tourism development improves environmental hygiene	3.76	0.871	74.40%
The foundation of natural reserve plays a significant role in environmental education and conservation of biodiversity.	3.66	0.847	67.00%
Tourism development reduces killing of animals and hewing of plants by villagers	3.51	1.064	61.10%
Tourism development leads to water pollution	3.5	1.069	58.90%
Tourism development leads to an increase in noise	3.48	1.026	59.60%
Tourism development brings more air pollution	3.13	1.034	38.50%

The positive impact of Huangshan tourism on the environment of the five towns in buffer zone is mainly reflected in the improvement of environmental hygiene and villagers' heightened awareness of environmental conservation. 74.4% of residents believe that environmental and hygienic conditions have remarkably improved in the villages, basically equaling last year. As mentioned before, residents think tourism creates more waste. But meanwhile, a great improvement has been achieved in sanitation and waste disposal, such as the remarkably increased garbage cans along the roads with more people, regular garbage cleaning by sanitation workers, dedicated garbage disposal plants, etc. 67.03% of residents believe that the establishment of natural reserves in the surroundings plays a significant role in environmental education and biodiversity conservation, 61.1% say that the killing of protected animals or hewing of protected plants are markedly reduced, and 28.1% present they come to know there are wild animals and plants that need protection in the surrounding areas. The data shows that the villagers are basically satisfied with the status quo of biodiversity conservation, but overall, the education and publicity by governments are not enough, residents themselves pay little attention to the protection of animals and plants, and almost no towns or villages organize any trainings or lectures on environmental education and biodiversity conservation, while villagers, busy with work or entertainment, lack motivation to learn knowledge about environmental protection.

3.4.3 Residents' perceptions of tourism involvement and support for tourism

Table 19 Measurement results of involvement in and support for tourism

Indicator	Average value	Standard deviation	Approval rate
It's very important to protect the natural environment	4.37	0.893	92.90%
Will use clean energy to protect environment	4.07	0.859	84.10%
Will continue to support Huangshan development	4.07	0.914	85.90%
Eager for tourism development	4.06	0.898	87.03%
Willing to give some advice for the development of Huangshan Scenic Spot	3.83	0.838	71.80%
Huangshan Scenic Spot contributes a lot to the local development	3.74	1.078	71.90%
Willing to engage in tourism-related jobs	3.69	0.991	66.30%
Satisfied with Huangshan development	3.42	1.126	58.50%
Huangshan Scenic Spot would listen to us when making a decision	2.68	1.177	27.70%

66.3% of residents express their willingness to engage in tourism-related jobs, 78.9% are willing to take the initiative to give some advice for the development of Huangshan Scenic Spot, but only 35.3% say that the scenic spot will listen to views from community residents when making a decision, even a decrease of about 8 percentage points from 35.3% of last monitoring. On the whole, most residents of the five towns in buffer zone are willing to offer their ideas and energy for the development of Mt. Huangshan tourism, but the interviewed residents all expose that the scenic spot seldom solicit views from community residents when making a decision and that there is even no corresponding program at all.

According to interviews regarding community involvement, residents in different towns in buffer zone have various degree of participation in tourism, which is in large part related to the radiation effect of Huangshan tourism development on these places. For example, Tangkou Town, adjoining Huangshan South Gate and most affected by the tourism development of Huangshan Scenic Spot, is Huangshan Scenic Spot's leading reception base to provide tourism and life service,

with 80% of labor force engaged in tourism. Apart from workers at tourism enterprises, the town is also full of self-employers. In contrast, the other towns are driven less by Huangshan Scenic Spot due to such factors as distance and resources, and opportunities for villagers there to work in the tourism industry are fewer.

87.03% of community residents are eager for tourism development, 85.9% say they will continue to support the development of Huangshan tourism. The data indicates that Huangshan tourism promotes the development of the five towns in buffer zone, and the vast majority of residents are willing to continue to support the tourism development, in the hope that it will bring about more job opportunities and improve the infrastructure and the living standards of residents..

3.4.4 Daily life of community residents

54.8% of residents are satisfied with the living environment, except for prices and medical treatment that are the greatest difficulties facing residents in the five towns in buffer zone, residents dissatisfied with prices and medical treatment accounting for 30.0% and 34.1% respectively. The data shows that the residents are highly satisfied with their living environment thanks to the advantages of the natural environment of Mt. Huangshan as well as the effective environmental protection by Mt. Huangshan Scenic Spot Administrative Committee and town governments, but the development of tourism also leads to rising prices and increasing employment pressure.

Table 20 Life satisfaction

Dissatisfactions with living in Huangshan	proportion
Dissatisfaction with medical treatment	34.10%
Dissatisfaction with prices	30.00%
Dissatisfaction with employment	21.50%
Dissatisfaction with education	12.60%
Dissatisfaction with living conditions	5.56%
Dissatisfaction with natural environment	5.56%

On drinking water, residents in Tangkou village in Tangkou Town, Zhongdun village in Tanjiaqiao Town and Jiaocun reflect there are problems like the water being contaminated or often

cut off. But overall, residents of the five towns in buffer zone have easy access to drinking water which is improving gradually. Most residents believe that drinking water is available without difficulty, but express their main concern over the water quality. For example, villagers from Zhaixi Village complaint that as some small enterprises villagers empty the dirty water into streams and pollute the water sources, they are not able to drink pure water; villagers from Baiguoshu village, Sankou Town present that the water was often cut off and muddy.

On Street lights, residents report there is a big problem. Most residents present there are no or unlit street lights on both sides of streets. Even on those streets with lights, the lights are not on all the time and not maintained for a long time by relevant staff; or street lights are not lit to save power due to few pedestrians and vehicles on roads at night. According to the interviews in Zhaixi Village, lights work well on main roads mainly serving tourists and extraneous traffic, while street lighting on alleys closely linked to residents' life is just so-so and affects their activities outside at night, another feature of Zhaixi Village as a tourism-oriented community.

On employment statistics, proportions of people working far away and tourism-relate personnel are respectively shown in the two tables below. From table 8, proportions of people working far way under 20% have a majority. The higher the proportion, the lower the frequency. It suggests that most residents in buffer zone tend to work locally rather than leave. As for tourism-relate personnel, 77 interviewees say there is no one in their family who engages in tourism-relate jobs, accounting for 28.5%. The situation of other families is shown in Table 9. The frequency of proportions of tourism-relate personnel above 39.9% totals 121, accounting for 45.7%

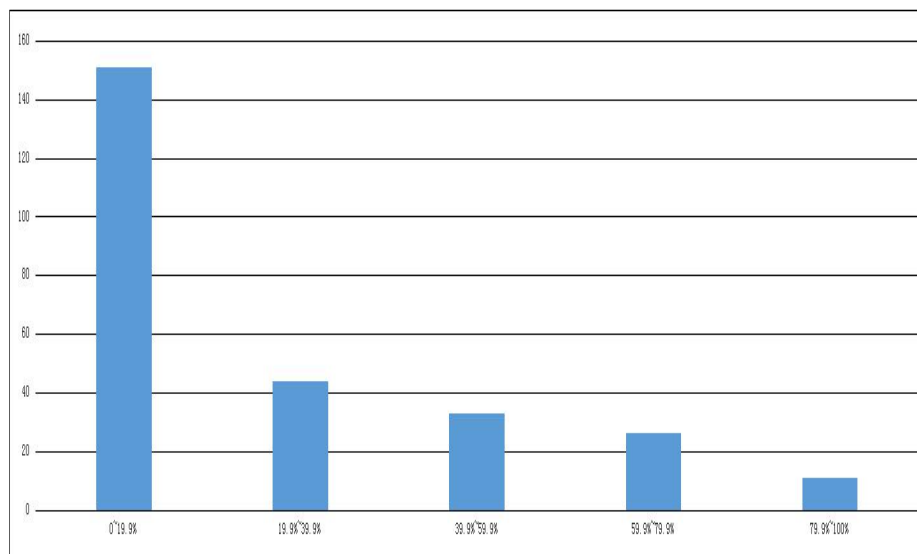


Table 8 Proportion of people working far away and its frequency

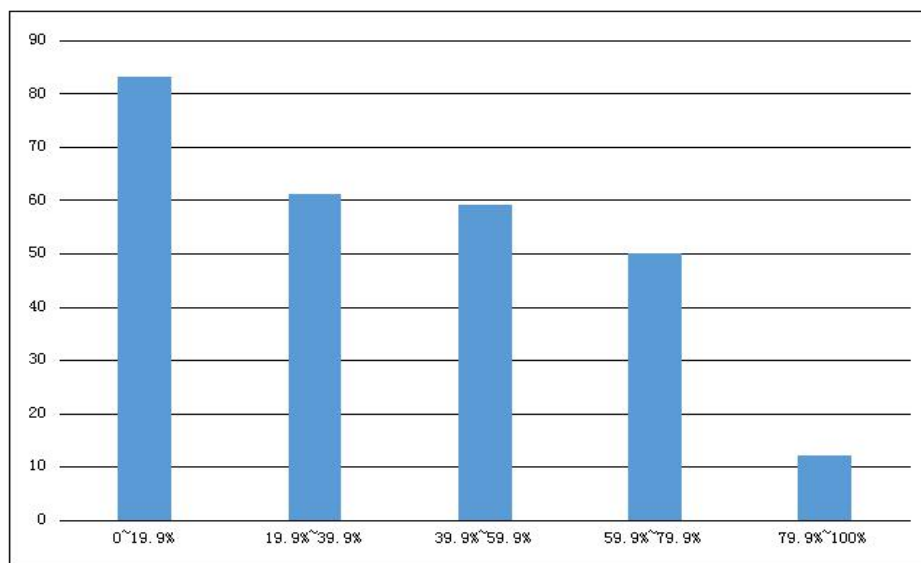


Table 9 Proportion of tourism-relate personnel and its frequency

3.4.5 Summary

The special distribution of satisfaction degree of residents in buffer zone of Huangshan with Huangshan development doesn't match exactly with that of affection degree of Tourism. For example, Tangkou Town is affected most by Huangshan tourism development, but residents there are least satisfied with it. For one thing, it is because residents of Tangkou Town have higher expectation of the development of Huangshan tourism. On the other hand, they suffer more negative impact of tourism development, since Tangkou Town is near Huangshan South Gate.

Residents in buffer zone are in support of Huangshan tourism, but their involvement in tourism could improve. During the interviews, most residents express their support for Huangshan tourism and willingness to give some advice for the development of Huangshan. However, the lack of perfect decision-making participation channels makes the will of residents

hardly heard.

Huangshan tourism development promotes the economic development of the buffer zone, increases job opportunities locally, but, at the same time, leads to problems like rising prices and widened gap between the rich and the poor. In terms of employment, the overall proportion of tourism-relate personnel has increased. And with the

transformation to tourism-oriented communities, community residents become more concerned about rising prices.

Although tourism development of Mt. Huangshan pollutes environment in buffer zone, it also heighten local residents' awareness of environmental conservation. The development of tourism causes such environmental problems as poor air quality, increased waste and water pollution, but also raises local residents' awareness of environmental conservation and boosts governments to carry out effective measures to protect environment. Having strong environmental awareness, residents are willing to use clean energy to protect environment. With the development of tourism, local residents have a stronger awareness of environmental conservation, active in response and attempt to protect wild animals and plants, dispose rubbish and use new energy. But presently, local residents don't have a lot of specific knowledge about environmental protection. It is still necessary for governments to actively promote environmental practice through education and publicity.

Many villages and towns in buffer zone have typical features of a tourism-oriented community, tourism facilities being improved yet community function being marginalized during the transformation. For example, in Zhaixi, Tangkou, residents often complain about the devices in the community including the insufficient medical care, the bad maintenance of street lighting and improper sewage treatment that affect the living environment in the community.

4 Tourist Perception and Satisfaction

4.1 Tourist indicator monitoring

Table 21 Tourist indicator monitoring and results

Key topics	Indicators	Frequency	Departments	Means	Monitoring results in this survey
Tourist satisfaction degree	1.Tourist satisfaction with resources, services, overall environment and other aspects of Mt. Huangshan	1 year	Tourism office	Questionnaire sampling; interview	Tourists are highly satisfied with the natural landscape, cultural experience and environment in Mt. Huangshan, but not very satisfied with the weather and climate, and think poorly of the services, especially the catering and souvenir. Their satisfaction degree in access to travel tips and tourism explication system is above average.
	2.Overall satisfaction of tourists	1 year	Tourism office	Questionnaire sampling	The overall satisfaction is high, over 70% of tourists believing the trip is good value for money, over 75% expressing their satisfaction with this trip.

	3. Tourist revisit rate and recommendation intention	1 year	Tourism office	Statistics	81.8% of tourists are willing to recommend Mt. Huangshan tourism to their families and friends, perceiving Huangshan is worth visiting. And 69.1% have revisit willingness.
	4. Tourist complaint rate of Mt. Huangshan Scenic Spot	1 year	Law enforcement squad	This project	A total of 39 complaint cases.
	5. Tourist perception of safety in travelling in Mt. Huangshan	1 year	Tourism office	Questionnaire sampling	69.1% of tourists are satisfied with the public security in Huangshan, but, only 55.9% agree on the option “Good public order draws people to Huangshan”.
Tourist research project	6. Tourist perception of brand image of Mt. Huangshan Scenic Spot	2 year	Monitoring project team	This project	For details, see topic 1.

4.2 Monitoring method

The tourist survey of the monitoring on sustainable tourism development of Mt. Huangshan is jointly conducted and completed by 3 graduate students, 11 undergraduate students and 1 Australian overseas student from School of Tourism, Sun Yat-sen University, from June 30 to July 7 of 2014, to learn about tourist satisfaction degree with Mt. Huangshan. The survey is conducted by questionnaire, supplemented with semi structural interview. The target of the survey is tourists who have toured Mt. Huangshan and are about to leave, and the questionnaire is for Chinese tourists.

The questionnaire is designed to comprise two main categories in terms of tourist satisfaction: the uniqueness of the destination and tourist re-visit and recommendation willingness, with a total of 52 subprojects. The perception of destination image is further divided into 8 projects: natural landscape, cultural landscape, attitude towards the local people, tourist information and infrastructure construction, tourist service, impact on the environment and the surroundings, administration of the scenic spot and heritage protection, with 36 subprojects. Tourist evaluation of these indicators employs Likert 5-grade scale: “strongly disagree”, “disagree”, “so-so”, “agree” and “strongly agree”, corresponding to 1, 2, 3, 4, 5 points respectively. An option of “have no idea” is added. Besides, tourist feeling after touring is measured by using 7 grades from 1 to 7 points to describe these four feelings: “excited”, “delighted”, “comfortable” and “thrilled”. 466 questionnaires are distributed and taken back immediately at the Mercy Light Pavilion tourist center in Huangshan Scenic Spot, with a 100% response rate. Invalid questionnaires removed, there are 424 effective questionnaires, representing a 91.0% efficiency rate. Below are the analytic results of the questionnaires.

4.3 Analysis of demographic features of tourist samples

4.3.1 Gender of the tourists

422 of tourists investigated completes the question on gender: 218 males, about 51.4% of the whole sample; 204 females, 48.1%. The proportion of male to female is harmonious.

Table 22 Sex composition of tourist samples

Sex	Frequency	Percentage
Male	218	51.4%
Female	204	48.1%
Missing data	2	0.5%
Total	424	100.0%

4.3.2 Age of the tourists

422 of tourists investigated complete the question on age. Most tourists are aged from 15 to 24, there are 201 of them, accounting for 47.4%; then the tourists aged from 25 to 44, 168, 39.6%; then the tourists aged from 45 to 64, 49, 11.6%; least the tourists over the age of 65, 4, only 0.9%. The details are shown in table 23. Tourists are younger, as compared with last year (proportions of tourists under the age of 44 and 24 have increased).

Table 23 Age composition of the tourists

Age group	Frequency	Percentage
15-24	201	47.4%
25-44	168	39.6%
45-64	49	11.6%
65 and over	4	0.9%
Missing data	2	0.5%
Total	424	100.0%

4.3.3 Educational level of the tourists

419 of tourists investigated complete the question on educational level. Tourists largely have received a senior high school, vocational secondary school, junior college or university education, among which 148 tourists having received a university education are in the majority, accounting for 34.9%, the same level of the previous year. And the next is tourists having received a senior high school or vocational secondary school education, accounting for 19.8%.

Table 24 Composition of the educational level of the tourists

Educational level	Frequency	Percentage
Lower secondary education or less	45	10.6%
Senior high school or vocational secondary school	106	25.0%
Junior college	84	19.8%
Bachelor degree	148	34.9%
Above	36	8.5%
Missing data	5	1.2%
Total	424	100.0%

4.3.4 Income of the tourists

419 of tourists investigated complete the question on incomes. 159 of tourists earn less than 1000yuan, accounting for 29.9%, in the majority. It's probably because many of the tourists investigated are students. Next is the 100 tourists with an income of between 3001 and 5000yuan, accounting for 23.6%. Least is tourists earning more than 10000yuan, accounting for 3.8%. Tourists making less than 5000yuan make up of 82% of the tourist samples, suggesting that low and middle-income earners are in the majority of tourists.

Table 25 Composition of the incomes of the tourists

Income Yuan	Frequency	Percentage
1000 or less	159	37.5%
1001-2000	20	4.7%
2001-3000	69	16.3%
3001-5000	100	23.6%
5001-10000	55	13.0%
10000 or above	16	3.8%
Missing data	5	1.2%
Total	424	100.0%

4.3.5 Occupation of the tourists

420 of tourists investigated complete the question on occupation. The table shows

that most of the tourists, 169 of them, are students, , accounting for 39.9%. Then is the 78 employees of government departments and institutions and 73 employees of enterprises, accounting for 18.4% and 17.2% respectively.

Table 26 Occupational composition of the tourists

Occupation	Frequency	Percentage
Student	169	39.90%
Employee of government departments and institutions	78	18.40%
Employee of enterprises	73	17.20%
Private business	37	8.70%
Others	25	5.90%
Public servant	21	5.00%
Farmer/worker	13	3.10%
Retiree	4	0.90%
Missing data	4	0.90%
Total	424	100.00%

4.3.6 Tourist source region

423 of tourists investigated complete the question on tourist source region. The main tourist source regions are Anhui province (34.9%) and Jiangsu province (13.7%), followed by

Shandong, Shanghai, Zhejiang, Hubei and Hebei. It can be seen that tourist source region is closely related to space, i.e. tourists largely come from Anhui province its surrounding provinces, reflecting that Mt. Huangshan Scenic Spot is more popular within the province.

Province	Frequency	Percentage	Province	Frequency	Percentage
Anhui	148	34.9%	Chongqing	4	0.90%
Jiangsu	58	13.70%	Hunan	3	0.70%
Shandong	34	8.00%	Beijing	2	0.50%
Shanghai	32	7.50%	Gansu	2	0.50%
Zhejiang	19	4.50%	Guizhou	2	0.50%
Hubei	17	4.00%	Ningxia	2	0.50%
Hebei	15	3.50%	Taiwan	2	0.50%
Guangdong	12	2.80%	Tianjin	2	0.50%
Jiangxi	11	2.60%	Yunnan	2	0.50%
Shanxi	11	2.60%	Jilin	1	0.20%
Henan	10	2.40%	Liaoning	1	0.20%
Heilongjiang	9	2.10%	Shaanxi	1	0.20%

Fujian	8	1.90%			
Sichuan	8	1.90%			
Inner Mongolia	7	1.70%			

Table 27 Composition of tourist source region

4.3.7 Summary

To conclude, tourists are mainly young and middle-aged, basically having received a university education. Most of them, with medium and low income, earn less than 5000yuan, which is due to their occupation, especially a larger proportion of them being students (near 40%). In terms of tourist source region, tourists are mainly from Anhui province or its neighboring provinces.

4.4 Perception of the uniqueness of the destination

4.4.1 Perception of the environmental uniqueness of the destination

On the uniqueness of the environment, tourists generally perceive Huangshan Scenic Spot have a great advantage in its clean and tidy environment. Tourist acceptance is above

80% with a 4.2 average value; Next is its landscape culture with a 4.21 average value and 72.6% acceptance. Acceptance of residents is relative low--57.3%, with an average value of 3.7 and standard deviation above 1.

Table 28 tourist evaluation on local environmental uniqueness

Evaluati on item	More unique sights of interest	Cleaner environment	More unique landscape culture	More relaxed atmosphere	More friendly and helpful residents
Average value	4.28	4.23	4.21	4.02	3.7
Standard deviation	0.91	0.88	0.97	0.96	1.17
Acceptan ce	82.50%	82.30%	79.50%	72.60%	57.30%

4.4.2 Evaluation of the uniqueness of tourist attractions

As opposed to other scenic spots, Mt. Huangshan Scenic Spot is of higher uniqueness overall, with an average value of 4.1; its strange pines and fantastic rocks receive highest acceptance: up to 92.7%, with a 4.57 average value, revealing that tourists widely accept the uniqueness of them; average value for natural landscape (including the sea of clouds) is up to 4.44, only second to strange pines and fantastic rocks, with a 86.3% acceptance.

Besides, Mt. Huangshan Scenic Spot's culture and tourist sites are accepted also with an average value of about 4 and over 70% acceptance. Relatively, acceptance of the public security of the scenic spot is low: only 55.9%, an average value 3.57.

Table 29 Tourist evaluation of the uniqueness of tourist attractions

Item	Overall	Strange pines and fantastic rocks are very unique	Natural landscape (including the sea of clouds) is more spectacular	Model of landscape culture in China	It embodies the idea that heaven and man are of a whole	Culture	More tourist sites	Public security
Average value	4.1	4.57	4.44	4.35	4.19	4.02	3.96	3.57
Standard deviation	0.97	0.73	0.89	0.79	0.95	1.04	1.05	1.2
Acceptance	76.20%	92.70%	86.30%	87.50%	80.90%	74.10%	70.80%	55.90%

4.5 Tourist intention of re-visit and recommendation

Tourist intention of re-visit and recommendation of Mt. Huangshan Scenic Spot to others reflects, to some extent, their satisfaction with the trip. According to the statistical analysis of the samples, 69.1% of the tourists say they will re-visit, 81.8% will recommend it to their friends and relatives, and 87.5% recommend Mt. Huangshan as a representative to introduce Chinese heritage to the world. This shows that Mt. Huangshan are approved by most tourists.

Table 30 Tourist intention of re-visit and recommendation

Item	I will visit	I will recommend Huangshan to my relatives	I recommend Huangshan as a
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	Huangshan again	and friends	representative to introduce Chinese heritage to the world
Average value	3.91	4.26	4.49
Standard deviation	1.34	1.06	0.87
Acceptance	69.1%	81.8%	87.5%

4.6 Tourist overall evaluation

Tourists are required to rate Mt. Huangshan according to their experience in it on a scale of 1 to 7, with 7 being strongly disagree. From the following table, basically tourists are thrilled and excited and delighted and relatively less relaxed. During the interview Many tourists say the whole mountain climbing is tiring.

Table 31 Tourist mood and overall impression after visiting

On the whole, tourists are satisfied with this trip (acceptance 77.1%, average value 4.04), more tourists hold that the trip is good value for money, accounting for 71.7%, with an average value of 3.93.

Table 32 Tourist overall impression of Huangshan

Evaluation item	I think the trip is good value for money	I'm satisfied with the trip
Average value	3.93	4.04
Standard deviation	1.11	1.02
Acceptance	71.7%	77.1%

4.7 Summary

From the analysis above, tourists drawn to Mt. Huangshan Scenic Spot are still mainly from Anhui Province and its neighboring provinces, and most of them are low and medium income earners. Students make up the largest part of tourists (39.9%), followed by employees of government departments and institutions(18.4%) and employees of enterprises(17.2%), which means that most of tourists in Huangshan are low and medium income groups and is also one of the reasons why the level of education of Huangshan tourists is generally high, for undergraduates make the largest part of the tourists surveyed—34.9%.

As for their perception of destination uniqueness, tourists grant recognition to Huangshan's natural scenery and landscape culture, speaking especially highly of its strange pipes and fantastic rocks. They are also satisfied with its environment and atmosphere but not with its public security and the friendliness of its residents.

Generally speaking, tourists are satisfied with Huangshan (77.1%), and express their willingness to recommend it to their friends and relatives (81.8%), and most of them regard Huangshan as a excellent representative of China's heritages to the world. But only 69.1% want to revisit the place.

5 Economic Impact of Tourism

5.1 Indicator monitoring of economic impact of the tourism

Table 33 Monitoring indicators and results of economic impact of the tourism

Key topic	Indicator	Frequency	Department	Means	Monitoring results in this
Tourism receipts	1.Total number of tourists received by Huangshan Scenic Spot	1 year	Statistics section	Regular statistics	Accumulated 2746457 tourists were received in Mt. Huangshan Scenic Spot in 2013, 8.7% lower than a year earlier, of which there were 162,455 inbound tourists,

2. Tourism statistics (gross tourism receipts, number of beds, number of tourists staying overnight and per capita spending, etc.)	1 year	Statistics section and relevant governmental departments in surrounding communities (Currently Tangkou Town only)	Regular statistics	There were 3906 beds in the scenic spot in 2013, and the number of tourists staying overnight reached 631200 per day, Per capita spending (Municipal Tourism Commission
3. Number of tourists received by surrounding low-altitude attractions	1 year	Relevant governmental departments in surrounding communities and district tourism committee	Regular statistics	Local research data shows Gengcheng Town received 1,437,900 tourists in 2013; the number of tourists was 77577; Tanjiaqiao Town in the 1-10 month received 927,000 tourists, and Tangkou as a key zone for low-mountain received 4,230,000

Economic Impact of Tourism

	4. Tourism statistics of surrounding low-altitude attractions	1 year	Relevant governmental departments in surrounding communities and district tourism committee	Regular statistics	See 5.2.3 in details.
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Seasonality of Tourism	5. Tourist ratio in busy months to slack months	1 year	Group Company and Statistics section	Statistic in this project	9 months of between March and November is the busy season; 3 months of between December and February is the slack season. In 2013, the number of tourists received by Mt. Huangshan Scenic Spot in the busy season accounted for 76.3% of all tourists of the year, and the ratio of the number of tourists in the busiest month (October) to that in the slackest month (December) was 5.60.
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Economic Impact of Tourism

Tourism impact on the employment	6. Job opportunities created by tourism	3 years	Statistics section	This project: questionnaire sampling;	This survey shows that Mt. Huangshan Tourism has brought a lot of employment opportunities for the surrounding low mountain scenic zone. Mt. Huangshan Scenic Spot subcontracts such business activities that target tourists as shouldering packages, running sedan-chair service, snacks and other crafts stands to Tangkou Tourism Development Corporation which
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Economic Impact of Tourism

Tourist spending	7. Spending proportion composition in dining, lodging, transport, traveling, shopping and entertainment	1 year	Project group	This project: questionnaire sampling; statistical data	It is difficult to acquire the data in this survey, so it is recommended that next survey learn this from statistical data.
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Economic Impact of Tourism

Economic driving role of tourism	(Topical study)	3 years	Project group	Topical study	The team members made a thorough investigation into the various towns and villages around Mt. Huangshan, found that Mt. Huangshan tourism has driven the surrounding economic development, and improved the economic consumption level of surrounding villages and towns. Mt. Huangshan tourism development drives the development of
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Source: Sorting by collected survey data

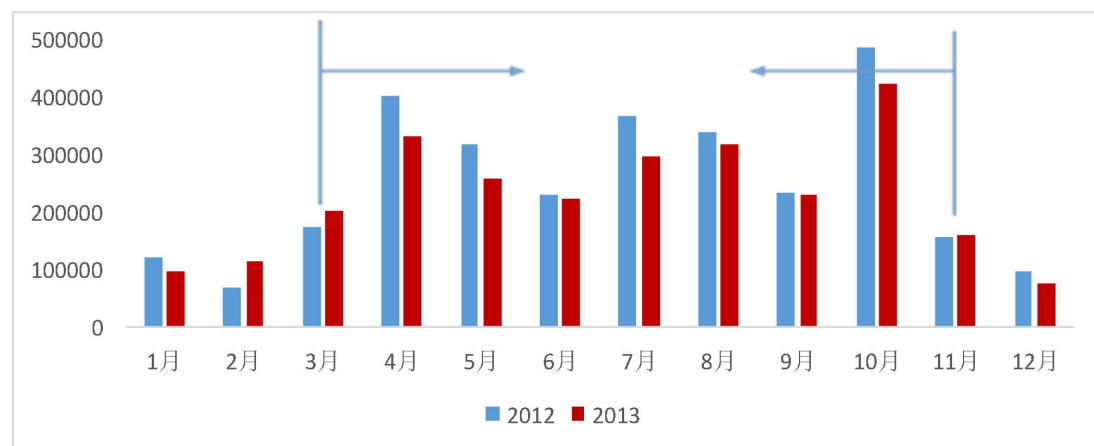
5.2 Overview

5.2.1 Tourism receipts

According to the monitoring data this year, Mt. Huangshan Scenic Spot received 2746457 tourists in 2013, with 8.7% decreased on a year-on-year basis, of which there were 162,455 inbound tourists, with 47.24% decreased on a year-on-year basis; the ticket sales were RMB 496.501 million Yuan in 2013, with 16.26% decreased on a year-on-year basis. The situation was not optimistic.

In addition, the monitoring data also shows that , of 2.7465 million people into the mountains, 1448100 got in through Cloud Valley Temple, 993900 through Mercy Light Pavilion, 304500 through Songgu An, accounting for 52.73%, 36.19% and 11.09% respectively. There were 3906 beds on the mountain in 2013, and the number of tourists staying overnight in the scenic spot reached 631200 person / day, with per capita spending (Municipal Tourism Commission sampling survey) of 1320 Yuan.

5.2.2 Seasonality of Tourism



**Picture 10 Distribution of tourists received by Huangshan Scenic Spot in each month
of 2012 and 2013**

Source: Huangshan Tourism Group Co., Ltd. Statistics Section

As is shown in the diagram, the numbers of tourists received by Mt. Huangshan Scenic Spot vary seasonally. The busy season lasts long, with the number of tourists remaining at high levels from March to November (9 months in total), and relatively low from December to next February (3 months in total). In 2013, the number of tourists received by Mt. Huangshan Scenic Spot in the busy season accounted for 76.3% of all tourists of the year, and the ratio of the number of tourists in the busiest month (October) to that in the slackest month (December) was 5.60.

By comparing numbers of tourists received by Huangshan Scenic Spot in each month of 2012 and 2013, there is no much difference between the two years, both showing obvious seasonality, the busy season for Huangshan tourism being from March to November and the slack season from December to next February. Tourists coming in the busy season make up a vast majority of all tourists in a year. The comparison shows, the number of tourists of 2013 dropped a little from last year. The number of tourists coming in the slack season of 2013 increased like in February, March and November, but remained the same as last year in January, December. But the number in the busy season of 2013 declined a little. (to see Picture 10). Generally speaking, compared with last year, the number of tourists of 2013 is quite stable with a light change.

5.2.3 Tourism and employment

According to the interviews of this survey, Mt. Huangshan tourism has brought a lot of employment opportunities for the surrounding low-mountain scenic spots. It's understood that, on the one hand, Mt. Huangshan Scenic Spot outsources business activities targeted at tourists like shouldering packages, running sedan-chair service, snacks and other crafts stands to Tangkou Tourism Development Corporation, which were ultimately assigned to villagers,

therefore providing villagers with job opportunities. On the other hand, tourist consumption in low-mountain villages and towns also has brought many employment opportunities to villagers.

Villagers can engage in tourism industry in the following three ways:

1、Work for tourism development companies, engaging in business operations of Mountain tourism or providing traveling service and so on;

2、Go to tourism-related shops in Tangkou or Zhaixicun, taking service jobs;

3、Open a Joyous farmer's house of their own or tourism-related stores.

Details of various villages engaging in tourism industry are as shown in Table 34.

Table 34 Tourism development and tourism employment in surrounding low-mountain villages and towns

Town	Tourism development	Tourism employment
Gengche ng Town	Accumulated 1437900 tourists were received in the town in 2013, with 11.3% increased on a year-on-year basis; tourism revenue was 511.354 million Yuan, with 2.4% increased on a year-on-year basis. Furong Valley received 702500 tourists, with 10.27% decreased on a year-on-year basis. Tiger Park received 94600 tourists, with 11.3% increased on a year-on-year basis.	Mainly tourist receptions: Accommodation and catering centered around Joyous farmer's houses, some foot bathing spots, but almost no supermarkets. Joyous farmer's houses received a total of 639,300 tourists.
Tanjiaqi ao	Tourism economic development momentum was good. The number of tourists received in between January	Mainly involves transport, catering, tourism commodity sales and service sectors.

Town	and October was 927,000, with 11.6% increased on a year-on-year basis; tourism revenue was 463,000,000 Yuan, with 12.56 increased on a year-on-year basis.	
Tangkou Town	Tangkou low-mountain scenic spots received 2,304,000 tourists, and tourism revenue reached 81,830,500 Yuan .	Tangkou is the South Gate of Mt. Huangshan with more tourists. Mainly tourist receptions including hotels, travel agencies, Joyous farmer's houses, star-rated hotels. The number of tourists received totaled 4.23 million in 2013.
Fang Cun	Fangcun tourism development is relatively backward	About 60% villagers now engage in tourism-related work, working in other towns where tourism development is better.
Gang Cun	Gangcun tourism is still under development, its reception ability limited, with not many tourists, which consist of a surplus of tourists in busy seasons, tourists who stop for food and a rest, and backpackers on a trip of countryside.	Over half of occupations are associated with tourism, such as waiters, opening travel agencies, tour guides, and promotion to individual tourists. More than 20 of them are tour guides.
Jiao Cun	The number of tourists was 77577, tourism revenue was 6.2062	Industry and Commerce Bureau took charge of counting Joyous farmer's

	million Yuan (mainly from catering, 80-90 Yuan per person, more family trips), The total annual revenue was about 4140 million Yuan (mainly agriculture).	houses, but the specific amount was unclear. According to the town government, there are three provincial three-star Joyous farmer's houses, two provincial two-star ones and one municipal two-star one. In 2014, one of them was closed. less tourists choose to enter the mountain through here because of inconvenient traffic. More tourists choose to stay overnight in Tangkou Town, Taiping or other places. Tourists stay not long, most of them are backpackers.
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Source: various towns and villages committee statistical data

Mt. Huangshan Tourism has brought a lot of employment opportunities for the surrounding towns and villages, mainly related to accommodation and catering industry (such as Joyous farmer's house, restaurants, etc.), and divided into household operation (including joint ventures) and work services. According to observation and interviews conducted by team members, accommodation and catering industry in Mt. Huangshan's surrounding towns and villages has been more mature. In terms of quality, surrounding towns and villages (including Tangkou、Zhaixi and some villages further from Huangshan) provide food (mainly local special food) more clean. Their stores, standard and clean, supply a variety of local food, covering different consumption levels. In terms of quantity, it's convenient and easy to get to the surrounding towns and villages for food and beverage and accommodation.

Mt. Huangshan tourism's benign development and tourists' diversified demand for its services has further brought diverse employment opportunities to the surrounding towns and villages, such as foot care, saling and mailing of tourist commodities and so on.

Generally speaking, job opportunities created by Huangshan tourism in six aspects, i.e. dining, accommodation, transport, travelling, shopping and entertainment are perceptible in the surrounding low-mountain villages. Development of Huangshan tourism generates the strong positive effect of overflow, promoting the economic development of surrounding towns and villages. And this positive impact is gradually extending.

5.2.4 The economic effect of tourism

Through the investigation, we found Mt. Huangshan tourism promote the development of transportation around Mt. Huangshan:

(1) Public transport facilities and service levels are improved, well received by Residents;

(2) Development of Local Business is promoted. To facilitate shopping of tourists, Huangshan has built a variety of shopping centers, retail outlets and specialty shops (special goods and food) in various towns and villages, directly promoting the development of business and increasing the incomes of villagers.

(3) Appearance and atmosphere of villages and towns are improved. The interviews show that, villages and towns has been actively improving various infrastructure since Mt. Huangshan Tourism develops, including roads, waste disposal points, green , etc. this is Greatly improved the living standards of the villagers.

(4) Lots of hotels were built with the development of tourism industry in Mt. Huangshan which gives a big push to benign development of real estate and Local resident's employment.

Generally speaking, Mt. Huangshan tourism development not only increase the income

of the villagers but also promote the improvement of local residents' living environment and quality, promote the urbanization of Mt. Huangshan surrounding villages and the spirit of the villagers' life of ascension.

6 Organization and Management

6.1 Results in scientific protection of resources and environment

Governing body of Mt. Huangshan scenic spot can be traced back to “Huangshan Construction Committee” (HSAC), initiated and established Xu Shiying, the former Prime Minister of Republic of China in 1931-1934 for the purpose of “Protect resources and environment, develop tourism economy, and brighten famous scenic site” to create a "National Park" management model.

In 1982, Mt. Huangshan scenic spot first started the preparation of “Master plan of scenic spots” in China; in 1989, Anhui Provincial People's Congress promulgated “Regulations of Mt. Huangshan scenic spot”, an earliest legislation in China on protection and management of scenic spots.

In 1998, the 22nd special session of the World Heritage Committee said “Huangshan is an outstanding scenic spot, a well-managed heritage site, and an Asian demonstration under excellent management with a complex scenic spot visited by a large number of tourists. Mt. Huangshan scenic spot Administrative Committee was awarded “Advanced unit of protection and management of world heritage site in China” by Ministry of Housing and Urban-Rural Development of PRC, State Administration of Cultural Heritage and China National Commission for UNESCO.

In 1999, HSAC has been first prized with “Honorable Mention of cultural landscape protection and management” by UNESCO in Asia.

In 2001, Mt. Huangshan was named as “National Geopark” by the Ministry of Land and Resources of PRC. In 2004, Mt. Huangshan became the first batch of Global Geoparks Network members of UNESCO.

In 2005, “Master plan of Mt. Huangshan scenic spot (2007-2025)” was prepared by the commissioned Tsinghua University and refined the concept of sustainable development: 1) to balance scientific conservation and sustainable development; 2) to focus on public education and tourist experience; 3) to co-ordinate orderly development inside and outside scenic zone; 4) to show the feature and culture; and 5) to deal with theory forward-looking and realistic operation well.

In late 2006, Mt. Huangshan was named as “ISO14000 National Demonstration Zone” by the State Environmental Protection Administration.

In 2007, Mt. Huangshan was titled as “Top ten scenic zones with best resources conservation” appraised by the Management Office of National Park of China.

In 2012, Mt. Huangshan was awarded “National tourism standardization

In 2012, Mt. Huangshan as the first global pilot scenic destination selected "Global Sustainable Tourism Destination experimental zone.”

In 2013, national tourism administration and environmental protection department awarded first batch of “national eco-tourism Demonstration Zone” to Mt. Huangshan.

In recent years, Mt. Huangshan scenic spot Administrative Committee (HSAC) has strengthened fine refinement management、humanized service、experience-oriented participation and conducted a series of exploration follow international trend、systematic strategy and wisdom support.

(1) “Sightseeing on mountains and living at the foot” was promoted; best and maximum capacity of tourists received were reasonably identified per day; “Winter tour” was promoted for coordinated development of seasonal tourism; product line management was carried out and “prediction/reservation/warning” mechanism was used for “tourist capacity control in peak and low seasons” in holiday travel. The followings, such as “Specifications of enclosed rotation retirement in scenic zone”, “Specifications of conservation of famous ancient trees” and other standards, led to prepare by HSAC, have become provincial standards;

“Requirements of trail construction in scenic zone” and “Scenic environment cleaning requirements” were applying for national industry standards. A “Special action to prevent pine wilt disease” was launched, with “Biological isolation belt”, 100 km long and 4 km wide, constructed. A research project “Huangshan biodiversity conservation” (the project was totally invested for \$ 13 million, with survey and research of local animal and plant resources in the range of more than 9,800 square kilometers in Huangshan City).

(2) Cooperative with national ministries, the following projects, like “Digital demonstration base of national scenic areas” (China Landscape and Historic Sites Association/Chinese Institute of Electronics), “National tourism standardization demonstrative unit” (National Tourism Administration), “National low-carbon tourism demonstrative area” (All-China Environment Federation/ China Tourist Attractions Association), “National demonstration area of tourism-related meteorological services” (China Meteorological Administration), and “Huangshan base of national tourism-related safety and emergency rescue” (State Administration of Work Safety / National Tourism Administration), have been launched in succession.

(3) Educational functions from Huangshan Heritage Museum, Geological Museum, Huangshan Painting and Calligraphy Institute and Tourist Center would be further improved in order to systematically demonstrate Huangshan natural and human resources, sustainable development course, along with management guidelines and requirements of scenic zone.

(4) Partnered with more than 30 media, sustainable development was promoted to the public widely; public service ads “Quality travel – together with you” was shot in conjunction with National Tourism Administration and China Central Television; Huangshan joint declaration “Green living - low-carbon development” was published together with more than 20 well-known scenic spots in China.

(5) Cooperation relationship with more than 20 well-known universities and research institutions has been deepened: “Huangshan base for the research of tourism sustainable development & mobile postdoctoral center of Nanjing University”, and “Sun Yat-sen University Huangshan Tourism Research Base” has been co-founded; well-known experts have been hired as “chief scientists” of Huangshan resources protection and environmental management.

6.2 Honors and social recognition

In 1979, Deng Xiaoping, Chinese leader, visited Huangshan and published his famous “Huangshan talks”, which opened a prelude to the reform and opening up of China tourism industry, and then Huangshan became the “beginning” of reform and opening up of China tourism industry.

In 1982, the State Council examined and released Mt. Huangshan as the first batch of “National Park of China”.

In 1985, in public appraisal of “top ten scenic zones in China” organized by *China Tourism News*, Mt. Huangshan stood out from more than 600 candidates, the only mountain scenic spot. In 2007, Mt. Huangshan was appraised as “Top ten most popular scenic zones in China” by the Management Office of National Park of China.

In 1990, Mt. Huangshan was included in the list of "World Cultural and Natural Heritage" of UNESCO, the 17th "mixed heritage" site in the globe.

In 1996, “Huangshan Tourism” was listed (China's first “Total factor tourism concept stock”); “Huangshan Tourism” was prized as a well-known trademark in China.

In 2005, Mt. Huangshan appraised as "Top ten most beautiful mountains in China” by *Chinese National Geography* and 30 national media.

In 2007, Ministry of Human Resources and Social Security of the People's Republic of China and National Tourism Administration awarded “Advanced collective of National Tourism System” to Mt. Huangshan scenic spot Administrative Committee. In the same year, Mt. Huangshan was ranked as the first batch of 5A tourist attractions in China by National Committee of Quality Rating for Tourist Attractions.

In 2010, Mt. Huangshan scenic spot Administrative Committee has been first prized with “Global Destination Management Award” by WTTC in Asia. In the same year, Huangshan Tourism Development Co., Ltd. joined WTTC, the third member in China.

In 2010, Mt. Huangshan was named a demonstration zone of "Tourism-themed Experience Tour of Shanghai World Expo in Yangtze River Delta". In the same year, Mt.

Huangshan was ranked in top three during the appraisal of “Top ten best tourist destinations in China” (city (s)/scenic zone(s)) by Trip and other industry bodies.

In 2011, recommended by All-China Environment Federation and China Landscape and Historic Sites Association, Mt. Huangshan scenic spot Administrative Committee joined International Union for Conservation of Nature and Natural Resources, the first Chinese tourist attractions and first heritage site in this international organization.

In 2012, Huangshan Tourism Development Co., Ltd. was awarded first batch of "National tourism standardization demonstration unit".

In 2012, Huangshan Geopark was affirmed by UNESCO.

In 2012, HSAC was awarded 18th Asian Tourism Golden Travel Award.

In 2012, Mt. Huangshan has been prized with China Tourism Social Responsibility Award for the best practices (tourist destination class) by the first Pacific Asia Travel Association.

6.3 International exchange and cooperation

HSAC not only insists on “green” development, but also focuses on opening-up development and strengthens international exchange and cooperation, around the objectives of “Take on historic mission, and protect world natural and cultural heritage sites; seize the opportunities of the times and build a world-class destination”.

HSAC has concluded friendly relationships with Swiss Jungfrau (2002), Yosemite National Park in the United States (2006), Petrified Forest of Lesvos-Greece (2008), and Whale Watch Kaikoura (2011) successively; in 2013, HSAC will conclude as a friendly park with Banff National Park; in addition, the link with Yellowstone National Park as well as well-known parks and world heritage sites in Australia, Russia, Brazil and other countries or regions is accelerating).

In the celebration of the 60th anniversary of Pacific Asia Travel Association (PATA) in 2011, HSAC elaborated the concept and connotation of “Good tourism” (friendly travel and tour), promoted by PATA (referred and innovatively developed by UNESCO). in 2012, HSAC

drafted and formulated basic framework of the standards of “the world excellent destinations (Scenic) evaluation index system” (SMED-N) world excellent destinations modeled on Huangshan, China, cooperative with World Centre of Excellence for Destinations (CED).

The Global Sustainable Tourism Commission took the lead in formulating “Global Sustainable Tourism Destination Criteria”(GSTC-D, 1.0) which was officially released in 2013. HSAC as the only Asian representative in the industry, involved in the drafting of international standards and provided Chinese release. In the future, continue to adhere to the duty and mission of “Protection first, development-driven; management-innovated, Huangshan harmony”, and then steadily be committed to “four-in-one” vision and practice for “minimal environmental impact, maximize economic output, optimized social impact and best tour experience”.

6.4 Tourism marketing program

Table 35 lists Huangshan tourism marketing programs in three years, i.e. in 2011-2013, and compared with 2011-2013 marketing programs, two themes and three markets in tourism marketing are basically maintained in three years; the objectives and tasks of annual number of tourists received are growing year by year, and specific policy measures will be timely adjusted and innovated according to external environment and internal requirements of tourism development. For example, change opportunity of post-Expo tourism hotspots proposed in 2011; “Four Seasons them activities” launched on the basis of “China Happy and Healthy Tour” specified by National Tourism Administration in 2012; focus on high-speed rail and self-driving tourism markets. And during these three years, online marketing has always been key to Mt. Huangshan tourism marketing.

Table 35 Mt. Huangshan tourism marketing program

	Marketing program
2011	"One objective": 2.6 million tourists going to Mt. Huangshan in 2011 "Two themes": “No mountain but Mt. Huangshan” in domestic market; “A fairyland in Mt. Huangshan in China” in overseas market

	"Three markets": traditional, emerging and inbound markets "Four keys": air charter tour and special train, online marketing, branch expansion, as well as change opportunity of post-Expo tourism hotspots "Five combinations": "old and new", "inside and outside", "far and near", "long and short", as well as "large and small"
2012	"One objective": 2.8 million tourists going to Mt. Huangshan in 2012 "Two themes": "All beautiful sceneries in Mt. Huangshan in China" in domestic market; "A fairyland in Mt. Huangshan in China" in overseas market "Three markets": highlighted sceneries in and focus on and domestic market, along with overseas market expansion "Four Seasons theme activities": Happy outing in Spring; Sunstroke prevention and recreation in Summer; Enjoyment and exploring in Autumn; A fairyland in Winter "Five idea changes" "Six priorities": consolidate and enhance tourism popularization (community, campus and company), comprehensively deepen online marketing, actively promote special flight and train, steadily implement branch expansion, perform the promotion in certain periods, as well as vigorously carry out overall linkage
2013	"One objective": 3.1 million tourists going to Mt. Huangshan in 2013 "Two themes": "No mountain experience but Mt. Huangshan" in domestic market; "A fairyland in Mt. Huangshan in China" in overseas market "Three markets": traditional, emerging and inbound markets "Seven steps" Five "new policies": self-driving guide, large conference team preference, promotion in Russian market, fixed deductible consumption, as well as pricing policy

	of sightseeing cableway in Xihai
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Source: Marketing Center of Huangshan Tourism Development Co., Ltd.

6.5 Communication between scenic zone and the community

Since 2010, the cadres have been dispatched mutually between Mt. Huangshan scenic spot Administrative Committee and surrounding townships for temporary service in consecutive three months or two years for the purpose of mutual communication and cooperation. From February 2010 to March 2014, section-level or mechanism cadres in 5 person-times have been selected and dispatched by Administrative Committee to serve in surrounding villages. Mutual dispatching in 13 person-times has been performed in 2011 and 2012, and From September to November 2011, Administrative Committee dispatched 3 section-level cadres to act as alcalde assistants of Tanjiaqiao Town and Jiaocun Town and deputy director in Tangkou branch, Huangshan District Bureau of City Administration and Law Enforcement, and then received 3 township cadres in Huangshan District, i.e. deputy head of Emergency Rescue Brigade under HSAC Comprehensive Enforcement Bureau, deputy director of Planning Management Office, Land Planning Division, Administrative Committee, as well as deputy director general of Traffic Management Bureau in Mt. Huangshan scenic spot; from September to November 2013, Administrative Committee dispatched 3 cadres to act as alcalde assistants of Sankou, Gengcheng and Jiaocun Towns, and then received 4 township cadres in Huangshan District, i.e. project manager of investment department under Huangshan Tourism Development Co., Ltd, office director assistant of HSAC Politics Division, director assistant of Fusong management zone, HSAC Bureau of Landscaping, as well as director assistant of Tourism Management Office, HSAC Economic Development Bureau.

7 Conclusions and suggestions

7.1 Further enhancement of tourists' experience

Mt. Huangshan Scenic Spot has made unremitting efforts in the enhancement of tourists' satisfaction which are fruitful, but it is also reflected through the tourists' evaluation that it is required for Mt. Huangshan Scenic Spot to continuously work hard in some areas to further enhance the tourists' experience.

The results show that Mt. Huangshan Scenic Spot attracts tourists primarily from the province and surrounding provinces, and accounted for a higher proportion of the low income groups; in addition, most major student groups, which means tourists in Mt. Huangshan higher proportion of low-income groups, and that is probably one of the reasons for tourists' higher cultural level.

On the uniqueness of destination perception, tourists have given affirmation to Mt. Huangshan natural scenery and landscape culture, especially speaking highly of strange rocks and stones, also satisfied with environmental atmosphere, but lacked perception of security and friendly residents.

Tourists were satisfied with Mt. Huangshan and some of them would recommend it to relatives and friends, but revisit rate was not high.

7.2 Co-ordination and planning of common development in surrounding communities

Community engagement is an effective way to plan common development of the community. Mt. Huangshan Scenic Spot should be closely linked with the surrounding community, focus on the development of core attractions, but not ignore sustainable development of the surrounding communities. In this survey, the analysis and comparison in economic, social, cultural, environmental and the residents' attitudes have been performed with respect to the impact of Mt. Huangshan tourism development on the five towns, namely Tangkou, Tanjiaqiao, Gengcheng and

Jiaocun Towns, which provides the basis for additional community engagement in the future. The discussion of small and medium-sized enterprises in buffer zone in typical study II plays a successful reference role in surrounding community engagement in tourism development in Mt. Huangshan Scenic Spot.

The survey results show that the impact on other communities surrounding Mt. Huangshan varies due to different geographic locations, traffic conditions and other objective reasons in the radiation of tourism development, where Tangkou Town features the highest tourism development due to its advantageous geographical location, the largest influence from Mt. Huangshan tourism development including positive impact such as increased employment opportunities and incomes, along with the improvement of infrastructure and housing, and negative impact such as rising prices and widened gap between the rich and the poor in the economy and more garbage and aggravated pollution. Therefore, the spatial distribution of Huangshan buffer residents' satisfaction degree for Huangshan development does not exactly match with that of tourism impacts. For example, Tangkou Town, the most affected by the Huangshan tourism development, least satisfies residents. One of the reasons is the high expectations of Huangshan tourism development by Tangkou Town residents. Another is the short distance with Mt. Huangshan South Gate which brings more negative effects of tourism development on residents.

The vast majority of residents recognize positive role of tourism development, and are willing to support tourism development and propose plans for the development of the scenic spot. But for most people, they have smallest voice on the scenic spot's development and growth, with single engagement; Buffer residents support Mt. Huangshan tourism, but tourism participation needs to be improved. Most residents expressed their support for the Mt. Huangshan tourism and are happy to contribute ideas. But due to the lack of perfect decision participation channels, the wishes of the people can not be expressed well.

Though Huangshan tourism development pollutes the environment, but it promotes local residents' environmental awareness. The development of tourism also causes environmental problems such as poor air quality, garbage increase, water pollution, etc. It also promotes the improvement of local residents' environmental awareness and the implementation of government's environmental measures. Residents generally have strong environmental awareness, willing to use clean energy for environmental protection. Along with traveling development, local residents generally promote environmental protection awareness, actively responding to and attempting the protection of wild animals and plants, garbage treatment and new energy use. But at present, local residents know little of environmental protection. And as for the practice of environmental

protection, the government needs to actively promote it by means of publicity.

Generally speaking, many villages and small towns in buffer zone have typical characteristics of tourist reception community, with tourism reception facilities being improved constantly, but in the process of the transition, its community function was marginalized. For example, in Tangkou Zhaixi village, residents complain about many problems, including community oriented equipment, inadequate medical facilities, community oriented street light facility maintenance and the sewage treatment improper influence community living environment and so on.

7.3 Strengthening of publicity of Huangshan brand

As a China's tourist destination and a "pioneer" of scenic spots in reforming and opening-up process, Huangshan has always been trying to establish its destination brand. The current Huangshan brand includes six main elements: mission, vision, spirit, target, development model and brand image. From the description of brand, it can be found that "Huangshan brand" points more to the internal management than external market. The establishment of a brand starts from within, requiring a standardized organization and strong culture of the organization, and is ultimately directed at external market. The establishment of brand image helps a brand produces the best possible results. However, still in the primary stage of brand building, Huangshan Scenic Spot emphasizes its internal management, but overlooks the market and customer base, failing to output the concept of the brand, thus impeding the transmission and efficiency of the brand. Therefore, in the process of branding, apart from continuing its internal management and arousing brand awareness among its employees, Huangshan should, more importantly, strength the marketing of its brand, make its external brand image more distinctive and have customers accept the brand value, so that Huangshan brand can really remain invincible in the competition among tourist destinations and become a good example.

At present, natural scenery is the most outstanding element of Huangshan brand. Huangshan has been a famous mountain in China since time immemorial, abundant in natural resources. So, Huangshan should lay more emphasis on this and make full use of its advantages in the process of branding. Huangshan is not only a scenic spot but also a famous mountain of culture, representing much of traditional Chinese culture. However, plenty of residents do not know the cultural meaning of Huangshan and most of tourists have no idea regarding its cultural connotation. So, in

the process of brand building, Huangshan should pay more attention to cultural transmission in an effort to let more people know and recognize its title of “Famous Mountain of Culture”.

7.4 Enhancement of SMEs’ sense of social responsibility

On the supply of products and services, SMEs focus on traditional cuisine and offer the same products. For the pursuit of new products and services, SMEs around Huangshan are underdeveloped in awareness of social responsibility and brand building. Plagiarism is a serious problem there. SMEs are reluctant to put in time and money on the innovation of products and services. As a result, homogeneity of products and services increases which is bad for the establishment of brand awareness.

On the conservation of environment, over half of the SMEs around Huangshan engage in accommodation, catering and other industries which cause great impact on environment. Most SMEs consciously observe environmental regulations and standards, but pay less attention to programs not mandatorily supervised by the government.

On staff treatment, with good consciousness, SMEs around Huangshan timely pay reasonable salaries, advocate women’s equal rights at work and allow workers to balance family and career. And the fact that the sex ratio in SMEs is harmonious demonstrates that most SMEs not only pursue women’s equal rights at work on their consciousness but actually do so.

On the overall tourism development of Huangshan city, personnel of SMEs show little concern. Though most of them are locals in Huangshan city and realize that the development of their business relies heavily on the overall development of Huangshan tourism, their priority is to realize their own interest to a maximization degree, lacking awareness of relations between self development and social responsibility.

On continuous operation, SMEs, though discontented, will still keep on running. Over half of the SMEs are not satisfied with the present situation, but more are willing to get their business rolling, suggesting that SMEs still look forward to the promising future of Huangshan.

7.5 Flexible incentive mechanism for tour guides

According to interviewed tour guides, in recent years, the development of Huangshan tourism is on an overall upward trend, the protection of resources is fruitful, the infrastructure and tourism facilities are fairly complete, but staff's quality of services remains to be improved. In recent years, the social image of tour guides has been severely damaged, low salary and terrible living state. The turnover of tour guides is on the increase.

According to comments made by the tour guides, they think Huangshan Scenic Spot does not give much favor in terms of arranging tour guides in line. The scenic spot should consider opening a special passage for tour guides who have to take care of their tourists.

8. Typical study

Study I Perception of Huangshan brand image

1 Background

With increasingly fierce market competition, more and more companies and organizations have come to realized that one of the most valuable assets is a brand related to various products and services. A strong brand has immense value, which can simplify consumers' decision-making by reducing risk and setting expectation. Like other consumer goods, a tourist destination also has to position and differentiate itself through branding and convey positive and evocative messages to tourists. As tourist destinations become more similar resulting in increasing substitute competition, branding may be the most powerful marketing weapon for marketers in modern tourist destinations. In the future, tourist destinations will no longer attract tourists by low price but by winning the heart and favor of those tourists. As a typical tourist destination of China, Mt. Huangshan's branding is a subject really worth researching.

Since research on branding in the field of tourist destinations has just begun, it is not very mature. Each researcher from different fields has his or her own definition of the concept of destination brand or just simply uses the general concept of brand, unable to reach a same concept. The concept of tourist destination branding given by Blainetal is the one widely accepted. Branding of a tourist destination is collection of a series of marketing activities including creating name, sign, logo and diagrams, which can identify and distinguish that destination, communicate constant expectation of memorable travelling experience associated with the destination, strengthen emotional ties between the destination and tourists and reduce tourists' searching cost and risks.

As a China's tourist destination and a "pioneer" of scenic spots in reforming and opening-up process, Huangshan has always been trying to establish its brand. Huangshan brand includes six main elements: mission, vision, spirit, target, development model and brand image. Vision means an entity's development objectives. Huangshan's vision is to minimize environmental impact, maximize economic output and optimize social impact and touring experiences, which show the

aim and brand management of Huangshan. Huangshan's innovative sustainable development model of four statues and one system is one of the highlights of Huangshan brand. The four statues include attaching importance to and conserving biodiversity, respecting and exchanging cultural diversity, improving public education and visitors' experience, as well as strengthening fair benefit and happiness. This model, occupying the leading level among scenic areas of China, constitutes an important part of Huangshan brand.

2 Research process

The tourist survey in this Huangshan sustainable tourism development monitoring project was conducted by 3 master-degree students, 11 undergraduate students and 1 Australian student from School of Tourism, Sun Yat-Sen University from June 30 to July 7, 2014, by means of questionnaire which targeted tourists who had visited Mt. Huangshan and were about to leave and local residents.

Perception scale of the brand image of the destination is made based on literature relating to influence and model of destination brand management, monitoring results, as well as Huangshan's own characteristics. Questionnaire of Huangshan brand image perception is divided into three parts—cognitive image, unique image and emotional image, each containing different factors. Cognitive image includes experiencing quality, tourist attractions, environment and infrastructure, entertainment and cultural tradition. Unique image includes native culture and environment, destination appeal and tourist attractions. And emotional image includes four dimensions of excitement, delight, relaxation and thrill. There are a total of 51 subprojects.

These indicators are evaluated with Likert's 5 grade scale—strongly unsatisfied, unsatisfied, somewhat satisfied, satisfied and highly satisfied, corresponding to 1,2,3,4,5 points respectively, along with another option of “have no idea”. Besides, tourist feelings are measured by grading their feelings of excitement, delight, relaxation and thrill from 1 to 7 points. 466 questionnaires were given to tourists in Mercy Light Pavilion tourist center in Huangshan Scenic Spot and all of them were received on the spot, among which 424 were usable. And 91 available questionnaires on residents' perception of brand were received.

3 Analysis of destination brand image

3.1 Analysis of demographic characteristics of the sample

Among tourists being surveyed, 218 are male, accounting for 51.4%, and 204 are female, accounting for 48.1%. As for age, most tourists, 201, are between 15 and 24 years old, accounting for 47.4%. Then are tourists, 168, aged between 25 and 44 years old, accounting for 39.6%. 49 are aged between 45 and 64 years old, accounting for 11.6%. The least is tourists over the aged of 65, only 4, accounting for 0.9%. As for education, most tourists have received education from high school, vocational secondary school, junior college or university, among which most have a bachelor degree, that is 148, accounting for 34.9%. Next are graduates from high school or vocational secondary school, accounting for 19.8%. As for income, most tourists, 159, earn less than 1000 Yuan, accounting for 29.9%. Maybe it's because there were lots of students among tourists surveyed. Second, 100 tourists have an income of 3001 to 5000 Yuan, accounting for 23.6%. Only 3.8%, the least, make more than 10000 Yuan. Tourists making less than 5000 Yuan account for 82%, indicating that most of tourists are medium and low-income groups. As for occupation, most tourists are students, 169, accounting for 39.9%, followed by employees of government departments and institutions or of enterprises, 78 and 73 and accounting for 18.4% and 17.2% respectively. As for origin, most tourists are from Anhui Province(34.9%) and Jiangsu Province(13.7%), followed by those from Shandong, Shanghai, Zhejiang, Hubei and Henan. It can be seen that tourist origin is closely related to regional space, that is, most tourists come from Anhui Province and neighboring provinces, suggesting that Huangshan Scenic Spot is more popular within the province.

To sum up, among tourists surveyed in Huangshan Scenic Spot, most are young or middle-aged, and basically have had undergraduate education. Most of them, making less than 5000 Yuan, are medium and low-income groups, which is due to their occupation, especially due to near 40% of them are students. In terms of origin, tourists most come from Anhui Province, then surrounding provinces.

3.2 Destination cognitive image

3.2.1 Tourist perception of cognitive image

Tourists have the highest awareness of the experiencing quality of Huangshan brand, then environment and infrastructure, then cultural tradition, least entertainment. Various indicators about tourist cognition of Huangshan destination image are shown in detail in Table 36.

Table 36 Tourist cognitive image statistics

Factor	Subitem	Average value	Standard deviation	Have no idea	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
				Unit: %					
Experiencing quality	It's convenient to get to the scenic spot	3.90	1.037	0.47	3.54	8.02	13.68	44.1	30.19
	Transportation is convenient in the scenic spot	3.84	0.989	0.47	2.12	9.2	17.22	44.58	26.42
	Lodging and dining are reasonable in	3.94	1.072	0.47	4.48	4.95	18.4	35.85	35.85

	price								
	You could feel laid-back atmosphere	2.83	1.293	5.42	18.16	21.46	25.94	16.51	12.5
	Natural scenery is spectacular	4.74	0.597	0.24	0.71	0.71	1.89	16.75	79.72
	It's spacious	4.25	0.941	0.47	1.89	3.3	13.44	30.42	50.47
	Local residents are very friendly	3.96	0.974	5.42	2.12	4.25	21.46	34.67	32.08
	Tour guides provide quality service	3.91	1.021	6.84	3.3	4.25	20.28	34.67	30.66
	It's a good model in management for scenic spots	4.14	0.918	3.07	1.42	2.59	18.63	32.55	41.75
	It continuously refines and	3.93	0.944	17.69	0.94	5.19	18.4	31.84	25.94

news its management									
Tourism is developed in an environmental responsible manner	4.22	0.849	4.48	0.94	2.12	14.15	36.32	41.98	
Heritage conservation is good	4.32	0.825	4.01	0.94	1.65	11.56	33.49	48.35	
Huangshan tourism help develop the neighboring communities	4.43	0.794	3.07	0.94	1.42	8.73	29.72	56.13	
Huangshan tourism has little environmental impact	3.73	1.109	3.77	3.54	10.14	24.06	29.72	28.77	
Huangshan tourism is favorable for	3.92	1.037	2.59	2.59	7.31	18.63	35.14	33.73	

	heritage conservation								
	Average value of the factor	4.00							
Tourist attractions	Local food here is very attractive	3.20	1.149	7.55	8.25	15.09	32.78	22.64	13.68
	Huangshan is a great attraction for family to visit	4.03	0.948	1.65	1.89	3.54	20.52	35.85	36.56
	The weather and climate is very attractive	3.65	1.214	0.24	8.25	9.67	18.4	35.85	27.59
	Huangshan's souvenirs are attractive	2.91	1.015	6.13	7.31	23.35	41.27	14.39	7.55
	Average value of the factor	3.45							

Enviroment and infrastru	Huangshan has clean and tidy unspoiled environment	4.02	0.904	1.18	0.71	5.66	18.16	40.8	33.49
	Huangshan has excellent infrastructure	3.97	0.818	0.94	0.47	4.01	19.81	48.58	26.18
	It's easy to get travel information about Huangshan	3.95	0.920	1.42	1.18	5.9	19.58	42.22	29.72
	It's easy to get the map and brochure of the scenic spot	3.58	1.135	2.59	4.48	13.68	24.06	31.6	23.58
	Information panels are clear in the scenic spot	3.75	1.010	2.12	2.36	9.67	21.93	40.09	23.82
	Artificial facilities go	4.02	0.874	2.36	1.18	3.77	17.69	43.87	31.13

well with the environment in the scenic spot								
Visiting Huangshan helps me know better China's landscape culture	4.58	2.801	0.71	0.47	2.12	8.49	34.2	53.54
Visiting Huangshan is very educational	4.17	0.841	0.71	0.94	1.89	16.75	39.62	40.09
Huangshan Scenic Spot is very concerned about its educational role	3.91	0.904	4.95	1.18	3.54	25.94	36.79	27.59
Public security is good in	3.98	0.895	5.9	0.94	3.3	22.88	36.32	30.66

	Huangshan								
	Average value of the factor	3.99							
Entertainment	There are rich and colorful activities in Huangshan	3.51	1.041	17.45	29.72	29.25	12.03	2.83	8.73
	I have more contacts with local people when touring the spot	3.31	1.128	16.75	24.06	31.6	16.98	5.42	5.19
	Average value of the factor	3.41							
Cultural tradition	Huangshan has its cultural tradition	3.80	1.004	25.94	35.14	22.17	8.73	1.65	6.37
	I can experience Huangshan's tea cultural	3.40	1.178	19.1	25.94	28.07	12.97	7.08	6.84

	practices								
	Huangshan is our spiritual home	3.91	1.014	33.02	32.31	22.17	6.84	1.89	3.77

Tourists have highest recognition of an average of 4 to travelling quality, among which natural scenery of Huangshan receives high recognition from 96.7% of tourists and the standard deviation is small, suggesting that basically all tourists recognize Huangshan's natural scenery. Only 71.7% agree that the scenic spot creates relaxed atmosphere. Next most recognized are “It’s a good model in management for scenic spots”, “Huangshan tourism helps develop the neighboring communities”, “Heritage conservation is good” and “Tourism is developed in an environmentally responsible manner”.

Then is environment and infrastructure with an average of 3.99, among which “Visiting Huangshan helps me know better China’s landscape culture” receives a highest average value of 4.58, followed by “Visiting Huangshan is very educational”, “Huangshan has clean and tidy unspoiled environment” and “Artificial facilities go well with the environment in the scenic spot”.

Culturally, tourists acknowledge Huangshan’s cultural tradition, among which 88.2 % of tourists believe that visiting Huangshan helps them know better China’s landscape culture but the standard deviation reaches 2.81, showing that a few tourists are quite against it. Speaking of certain concrete items, tourists are not very satisfied. For example, less than 50% of tourists are not satisfied with tea culture, with an average value below 4.

3.2.2 Residents’ perception of cognitive image

Residents have the highest awareness of cultural tradition, then experiencing quality, then environment and infrastructure, then tourist attractions, least entertainment. Various indicators about residents’ cognition of Huangshan destination image are shown in detail in Table 37.

Table 37 Residents’ cognitive image statistics

F	Subitem	A	S	H	Str	D	N	A	Str
actor		verag	tanda	ave no	ongly	isagre	eutral	gree	ongly

		e value	rd deviat ion	idea	disagre e	e			agree
				Unit: %					
E xperie ncing quality	It's convenient to get to the scenic spot	4.12	.941	0	1.1	8.8	5.5	46.2	38.5
	Transport ation is convenient in the scenic spot	3.74	1.182	4.4	0	6.6	22.0	40.7	26.4
	Lodging and dining are reasonable in price	4.11	1.130	1.1	1.1	9.9	11.0	27.5	49.5
	You could feel laid-back atmosphere	3.76	1.109	0	4.4	7.7	26.4	30.8	30.8
	Natural scenery is spectacular	4.87	0.476	0	0	1.1	2.2	5.5	91.2
	It's	4.10	1.076	0	4.4	5.5	9.9	36.3	44.0

	spacious								
	Local residents are very friendly	4.33	.844	0	0	4.4	11.0	31.9	52.7
	Tour guides provide quality service	3.75	1.170	2.2	3.3	6.6	22.0	37.4	28.6
	It's a good model in management for scenic spots	4.13	1.002	1.1	1.1	2.2	19.8	30.8	45.1
	It continuously refines and news its management	3.75	1.207	3.3	4.4	2.2	22.0	40.7	27.5
	Tourism is developed in an environmental responsible manner	3.73	1.146	3.3	1.1	6.6	23.1	40.7	25.3

	Heritage conservation is good	4.00	1.116	2.2	2.2.	2.2	19.8	34.1	39.6
	Huangshan tourism help develop the neighboring communities	3.99	1.169	1.1	5.5	3.3	14.3	35.2	40.7
	Huangshan tourism has little environmental impact	3.55	1.167	2.2	4.4	8.8	25.3	39.6	19.8
	Huangshan tourism is favorable for heritage conservation	4.01	1.070	2.2	1.1	2.2	20.9	35.2	38.5
	Average value of the factor	4.00							
Tourist	Local food here is	4.01	0.994	0	2.2	3.3	25.3	29.7	39.6

attracti ons	very attractive								
	Huangsh an is a great attraction for family to visit	4.09	0.985	0	2.2	5.5	14.3	37.4	40.7
	The weather and climate is very attractive	3.90	1.146	1.1	2.2	8.8	19.8	29.7	38.5
	Huangsh an's souvenirs are attractive	3.34	1.147	0	7.7	13.2	34.1	27.5	17.6
	Average value of the factor	3.84							
E nviron ment and infrastr ucture	Huangsh an has clean and tidy unspoiled environment	3.74	1.094	0	3.3	12.1	19.8	37.4	27.5
	Huangsh an has excellent	3.79	1.070	1.1	1.1	8.8	25.3	34.1	29.7

infrastructure									
It's easy to get travel information about Huangshan	4.24	0.874	0	1.1	2.2	15.4	34.1	47.3	
It's easy to get the map and brochure of the scenic spot	3.76	1.078	2.2	2.2	6.6	17.6	49.5	22.0	
Information panels are clear in the scenic spot	3.80	1.077	3.3	0	6.6	16.5	50.5	23.1	
Artificial facilities go well with the environment in the scenic spot	3.96	0.977	1.1	0	5.5	22.0	38.5	33.0	
Visiting Huangshan helps me	4.27	0.978	2.2	0	2.2	8.8	37.4	49.5	

	know better China's landscape culture								
	Visiting Huangshan is very educational	4.01	1.027	2.2	0	2.2	23.1	35.2	37.4
	Huangshan Scenic Spot is very concerned about its educational role	3.74	1.210	2.2	2.2	9.9	24.2	28.6	33.0
	Public security is good in Huangshan	4.42	0.817	0	0	3.3	11.0	26.4	59.3
	Average value of the factor	3.97							
E ntertai	There are rich and	3.45	1.223	2.2	4.4	12.1	31.9	26.4	23.1

nment	colorful activities in Huangshan								
	I have more contacts with local people when touring the spot	3.87	0.957	0	2.2	5.5	23.1	41.8	27.5
	Average value of the factor	3.66							
Cultural tradition	Huangshan has its cultural tradition	4.11	1.069	2.2	1.1	2.2	16.5	34.1	44.0
	I can experience Huangshan's tea cultural practices	4.04	1.192	1.1	4.4	4.4	17.6	24.2	48.4
	Huangshan is our spiritual home	4.24	0.821	0	0	3.3	14.3	37.4	45.1

Residents have highest recognition of an average value of 4.13 to cultural tradition of Huangshan, suggesting that community residents have strong perception and recognition of its cultural tradition. On this dimension, the subitem of “Huangshan is our spiritual home” is highest in average value and smallest in standard deviation, showing that most Huangshan community residents consider Huangshan, which is of great spiritual significance to them, part of their spiritual life.

Residents’ recognition to Huangshan’s experiencing quality comes next, indicating that most residents think Huangshan, as a tourist destination, has high experiencing quality. On this dimension, the subitem of “Natural scenery is spectacular” gets the highest average value, also the highest of the whole cognitive image scale. 96.7% of residents agree that natural scenery is spectacular in Huangshan, meaning that this brand advantage has filtered into people’s mind. While “Huangshan tourism has little environmental impact” is lowest in average value, only 3.55, suggesting that many residents have already sensed the impact of Huangshan tourism on environment.

The average value of the factor of Environment and infrastructure ranks third. On the dimension, the subitem of “Public security is good in Huangshan” has the highest average value of 4.42, indicating that most residents are satisfied with the local public security. The lowest in average value, 3.74, are “Huangshan has clean and tidy unspoiled environment” and “Huangshan is very concerned about its educational role”

The fourth is the factor of tourist attractions. On this dimension, the subitem of “Huangshan is a great attraction for family to visit” has the highest average value, and 78.1% of residents agree, while “Huangshan’s souvenirs are very attractive” has the lowest, indicating that residents’ recognition to Huangshan’s souvenirs is weak. In the process of branding, Huangshan should pay attention and try to develop souvenirs that embody Huangshan’s characteristics and are more attractive.

Residents’ weakest recognition to entertainment of the destination shows that most residents do not think there are varied and colorful activities in Huangshan. Therefore, when branding, Huangshan should make full use of the local customs and flavor and provide more entertainment.

3.3 Destination unique image

3.3.1 Tourist perception of unique image

Destination unique image is a collection of all the distinctions of a destination, an important part of destination branding. As shown in Table 38, tourists regard Huangshan's tourist attractions as the most unique of those of other scenic spots with an average value of 4.33. Huangshan Scenic Spot is quite unique as a whole with an average value of 4.1. Strange pipes and fantastic rocks receive the highest recognition up to 92.7%, 4.57 average value and 0.73 standard deviation, indicating the uniqueness of these pipes and rocks of Huangshan. Natural scenery (including sea of clouds) reaches an average value of 4.44, second to strange pipes and fantastic rocks, and receive 86.3% recognition.

On local culture and environment, tourists generally believe Huangshan Scenic Spot is superior in terms of sights of interest and environmental cleanness, winning 80% recognition, with an 4.2 average value. Then is landscape culture, with an average of 4.21 and recognition of 72.6%. What's more, Huangshan Scenic Spot is also recognized for its culture and tourism sites, with an average value of 4 and recognition of 70%. Relatively speaking, public security of the spot has weak recognition of only 55.9% and an average of 3.57.

Table 38 Tourist unique image statistics

Factor	Subitem	Average value	Standard deviation	Have no idea	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
				Unit: %					
Local culture and environ	Huangshan's landscape culture is more unique than	4.23	0.903	47.17	31.84	15.57	1.89	1.65	1.89

ment	other places								
	Huangshan's residents are more friendly and helpful	3.73	0.968	23.11	31.37	31.13	6.37	1.65	6.37
	Huangshan's sights of interest are more unique	4.30	0.828	49.06	32.55	14.86	0.94	0.94	1.65
	Huangshan has stronger relaxed atmosphere	4.02	0.934	35.38	36.56	21.7	3.54	1.65	1.18
	Huangshan has cleaner and tidier environment	4.25	0.799	44.34	37.5	15.09	1.42	0.47	1.18
	Average value of the factor	4.11							
Destina tion appeal	Huangshan Scenic Spot is more attractive than other scenic spots	4.15	0.865	40.09	35.85	19.1	1.89	0.94	2.12

	Huangshan Scenic Spot has richer cultural connotations	4.06	0.916	36.32	37.03	18.87	4.01	1.18	2.59
	Huangshan's good public security attracts people	3.59	1.063	20.05	33.96	26.89	9.91	4.01	5.19
	Average value of the factor	3.93							
Local attractions	Huangshan has more tourist sites than other places	3.99	0.949	33.73	35.85	21.46	4.25	1.65	3.07
	Huangshan is a model for China's landscape culture	4.36	0.762	50	37.26	10.38	1.42	0.47	0.47
	It embodies Chinese idea of "unity of the heaven and	4.23	0.829	43.4	36.56	15.09	2.36	0.47	2.12

	human”								
	Huangshan’s strange pipes and fantastic rocks are very special	4.59	0.664	67.22	25.47	5.66	0.94	0.24	0.47
	Its natural scenery is more spectacular than other scenic spots	4.49	0.751	59.67	26.18	9.43	0.94	0.47	3.3
	Average value of the factor	4.33							

3.3.2 Residents’ perception of unique image

Compared with cognitive image, residents have generally high perception of Huangshan’s unique image, demonstrating that Huangshan brand has certain advantage in terms of uniqueness. The statistics reflects that residents have the strongest perception of local attractions. On this dimension, two subitems related with Huangshan’s natural scenery have relatively high average value, they are, “Huangshan’s strange pipes and fantastic rocks are very unique” and “Its natural scenery is more spectacular than other places”. This shows that among components of current Huangshan brand, its advantage of beautiful scenery has been widely recognized.

Next comes residents’ perception of local culture and environment, among which “Huangshan’s sights of interest are more unique” has highest average value. Therefore, on the whole, residents highly recognize Huangshan’s scenery, but not quite acknowledge its friendly

community environment, atmosphere, environment and cultural transmission.

Table 39 Residents' unique image statistics

Factor	Subitem	Average value	Standard deviation	Have no idea	Strongly disagree	Disagree	Neutral	Agree	Strongly agree
				Unit: %					
Local culture and environment	Huangshan's landscape culture is more unique than other places	4.33	0.844	0	1.1	2.2	11.0	34.1	51.6
	Huangshan's residents are more friendly and helpful	4.40	0.787	0	0	2.2	12.1	29.7	56.0
	Huangshan's sights of interest are more unique	4.42	0.790	0	0	4.4	5.5	34.1	56.0
	Huangshan has stronger relaxed	4.05	0.982	0	1.1	5.5	22.0	29.7	41.8

	atmosphere								
	Huangshan has cleaner and tidier environment	4.09	1.061	1.1	0	7.7	17.6	27.5	46.2
	Average value of the factor	4.26							
Destination appeal	Huangshan Scenic Spot is more attractive than other scenic spots	4.10	1.065	2.2	1.1	2.2	16.5	35.2	42.9
	Huangshan Scenic Spot has richer cultural connotations	3.98	1.085	3.3	0	2.2	19.8	39.6	35.2
	Huangshan's good public security attracts people	3.99	0.972	0	2.2	5.5	17.6	40.7	34.1
	Average value of the factor	4.02							

Local attractions	Huangshan has more tourist sites than other places	4.12	0.929	0	1.1	3.3	20.9	31.9	42.9
	Huangshan is a model for China's landscape culture	4.33	0.895	1.1	0	2.2	11.0	33.0	52.7
	It embodies Chinese idea of "unity of the heaven and human"	4.07	1.172	4.4	0	2.2	14.3	36.3	42.9
	Huangshan's strange pipes and fantastic rocks are very special	4.57	0.701	0	0	2.2	5.5	25.3	67.0
	Its natural scenery is more spectacular than other	4.51	0.835	1.1	0	1.1	7.7	25.3	64.8

	scenic spots								
	Average value of the factor	4.32							

3.4 Destination emotional image

3.4.1 Tourist perception of emotional image

Based on their touring experience, tourists were asked to mark their overall impression of Huangshan from 1 to 7, with 7 being the least agree. According to the table below, tourists are basically excited, thrilled and delighted. But the level of relaxation in Huangshan is relatively low both in average value and in percentage. Quite a few tourists said in the interview that the whole mountain hiking was very tiring.

Table 40 Tourist emotional image statistics

Emotion	Average value	Standard deviation	Percentage						
			1 (most agree)	2	3	4	5	6	7 (Least agree)
Excited	2.17	1.74	57.5	13.7	8.7	4.5	9.0	2.4	4.0
Delighted	2.22	1.85	56.6	15.8	7.8	4.0	6.6	2.8	6.4
Relax	2.86	2.16	44.1	12.7	10.4	7.3	9.2	4.0	12.3

ed									
Thrilled	2.42	2.02	52.6	15.3	10.8	3.8	4.5	2.4	10.6

3.4.2 Residents' perception of emotional image

Table 41 is about residents' emotions when touring Huangshan, showing that residents are most delighted and least thrilled. Maybe it's because community residents' daily life is tied to Huangshan and they have known quite well of it, so compared with tourists, they feel less thrilled when touring it. Huangshan Scenic Spot is more of a park to local residents who feel very pleasant and delighted when they visit this place.

Table 41 Residents' emotional image statistics

Emotion	Average value	Standard deviation	Percentage						
			1 (Most agree)	2	3	4	5	6	7 (Least agree)
Excited	1.89	1.501	62.6	16.5	5.5	6.6	4.4	2.2	2.2
Delighted	1.75	1.379	67.0	14.3	7.7	4.4	3.3	1.1	2.2
Relaxed	2.59	1.862	41.8	16.5	15.4	11.0	5.5	2.2	7.7
Thrilled	2.65	2.078	41.8	23.1	9.9	7.7	3.3	0	14.3

4 Conclusion and discussion

Brand image of the tourist destination includes cognitive image, unique image and emotional image. Tourist perception of these three images is stronger than that of residents, who live at the foot of Huangshan and therefore feel less strong about its tourist function and brand image. It's also because the questionnaires were not sent to them when they were visiting it.

Tourists and especially residents feel much stronger about Huangshan's unique image than its cognitive one, indicating that uniqueness of Huangshan brand is widely recognized by the public who believe that Huangshan is more special than other scenic spots. They also think that uniqueness is a more important element of destination brand image, so Huangshan should place more emphasis on its uniqueness when branding.

On emotional image, "relaxed" and "thrilled" receive lower recognition, because mountain resorts require a lot of energy and exercise which is too much to be "relaxed". And Huangshan, as a natural and cultural heritage, is less impressive than the Great Wall, the Palace Museum and other heritages with rich history and culture, so it is less likely to make people feel thrilled.

Table 42 Comparison between tourists' and residents' perception of Huangshan brand image

Image	Subitem	Average value for tourists	Average value for residents
Brand image	Experiencing quality	4.00	4.00
	Tourist attractions	3.84	3.45
	Environment and infrastructure	3.97	3.99
	Entertainment	3.66	3.41
	Cultural tradition	4.14	3.70
Average value		3.92	3.71

Unique image	Local culture and environment	4.26	4.11
	Destination appeal	4.02	3.93
	Local attractions	4.32	4.33
Average value		4.20	4.12
Emotional image	Excited	1.89	2.17
	Delighted	1.75	2.22
	Relaxed	2.59	2.86
	Thrilled	2.65	2.42
Average value		2.22	2.42

According to the data analysis above, natural scenery is the most remarkable in Huangshan brand from the perspective of the community residents. Huangshan has been one of China's most famous mountains since time immemorial, superior in its natural resources. So, Huangshan should emphasize this part in brand building, making full use of it.

When building its tourist destination brand, Huangshan should also take into consideration the relation between tourists and local residents, enhancing their interaction with each other. At present, the only relationship between tourists and residents is that of buyers and sellers, some tourists even didn't meet local people. As a tourist destination, Huangshan should try to create opportunities for tourists to get glimpses of life of local people, so that they could be more than just buyers and sellers. In this way, tourists may have more affective bondings with local people and with the whole Huangshan, therefore more likely to revisit and promote this place.

Huangshan is not only a scenic spot but also a famous mountain of culture, representing much of traditional Chinese culture. However, plenty of residents do not know the cultural meaning of Huangshan and most of tourists have no idea regarding its cultural connotation. So, in the process of brand building, Huangshan should pay more attention to cultural transmission in an effort to let more people know and recognize its title of "Famous Mountain of Culture".

Study II Social responsibility and brand awareness of SMEs

1 Basic information

In communities surrounding Huangshan are located many small and medium-sized enterprises (SMEs), which are responsible for the shopping, accommodation and food of most of tourists who come to Huangshan. As an important component of Huangshan Scenic Spot, these SMEs have a great impact both on the environment in Huangshan's periphery and tourists' impression of Huangshan. Thus, their social responsibility and brand awareness have a significant role in the development of Huangshan Scenic Spot.

Corporate social responsibility is a series of behaviors not required by the law conducted by enterprises for the benefit of the society. 'Carroll brought forward a three-dimensioned conceptual model of CSP addressing corporate social responsibility, corporate social responsiveness and corporate social value. Corporate social responsibility is further divided into economic responsibility, legal responsibility, moral responsibility and responsibilities freely decided by enterprises. Studies show that corporate social responsibility is a crucial source for an enterprise to extend the reach of its brand, so enterprises positively taking social responsibility can not only do good to the surrounding environment but also promote the development of themselves.

Brand awareness is the extent to which a brand is recognized by potential customers, related to the functions of brand identities in consumers' memory and can be reflected by how well the consumers can identify the brand under various conditions. Meanwhile, brand awareness is also affected to some extent by customers' awareness and attitude, as well as the society and advertising. High brand awareness can increase sales of the product, supervise and guarantee product value, achieve economies of scale, therefore ensuring that the enterprise keep growing and thriving.

2 Research process

Personnel of SMEs in buffer zone of Huangshan Scenic Spot, including bosses, managing partners and staff, were monitored this time for their views of social responsibility, brand awareness and development prospect by means of questionnaires supplemented with

interviews. From June 30 to July 7, a total of 85 available questionnaires were sent to SMEs, 40 to those in Tangkou Town, 25 to Zhaixi Town, and 9 to Jade New Village. The questionnaires were designed in the pattern of Likert's 5-grade scale in which each question has 5 statements, each of which has five options of "strongly agree", "agree", "maybe", "disagree" and "strongly disagree" represented respectively by 5,4,3,2,1. This section of report is based on these 85 questionnaires and the descriptive statistics of them.

3 Resident employment and relevance to the tourism

3.1 Demographic features of SME staff

(1) Harmonious sex ratios

Of 85 available questionnaires, 2 did not tell the gender of the respondents, so 34 are male, accounting for 41%, and 49 are female, accounting for 59%, more feminine than masculine. But the whole proportion is rather balanced.

(2) Personnel of SMEs are most young and middle-aged

Of 85 respondents telling their ages on the questionnaires, 73 are aged between 25 to 50 years old, accounting for 85.9%. The respective number of workers in the 21-30, 31-40 and 41-50 age groups are similar. Less are below 20 or above 50 years old, 5 and 7, accounting for 5.9% and 8.3% respectively. See Table 43.

Table 43 Age distribution of personnel of SMEs

Age					
		Frequency	Percentage	Effective percentage	Accumulative percentage
Valid	<20	5	5.9	5.9	5.9
	21-30	26	30.6	30.6	36.5

	31-40	21	24.7	24.7	61.2
	41-50	26	30.6	30.6	91.8
	51-60	5	5.9	5.9	97.6
	>60	2	2.4	2.4	100.0
	Total	85	100.0	100.0	

(3) Personnel of SMEs are mainly residents of Huangshan city

85 questionnaires show the source of respondents. Most workers of SMEs are from Huangshan city, then other cities of Anhui Province, then other provinces or overseas. Their frequencies and percentages are shown in Table 44.

Table 44 Domicile of personnel of SMEs

Household Register					
		Frequency	Percentage	Effective percentage	Accumulative percentage
Valid	Huangshan city	64	75.3	75.3	75.3
	Anhui Province	13	15.3	15.3	90.6
	Other provinces	7	8.2	8.2	98.8
	Overseas	1	1.2	1.2	100.0
	Total	85	100.0	100.0	

(4) Personnel of SMEs have low level of schooling

According to 85 questionnaires regarding educational attainment, 31 workers graduate from junior high school and 32 from senior high or technical secondary school, constituting the most part of respondents, accounting for 36.5% and 37.6% respectively. Only 3 are university graduates or above. On the whole, workers of SMEs have low level of education.

Table 45 The educational attainment of personnel of SMEs

Educational attainment					
		Frequency	Percentage	Effective percentage	Accumulative percentage
Valid	Primary school or below	9	10.6	10.6	10.6
	Junior high school	31	36.5	36.5	47.1
	Senior high school or technical secondary school	32	37.6	37.6	84.7
	Junior college	10	11.8	11.8	96.5
	University graduate	2	2.4	2.4	98.8
	Postgraduate	1	1.2	1.2	100.0
	Total	85	100.0	100.0	

From the cross-over analysis of educational attainment and age shown in Table 46, the staff are mainly aged 21 to 50, 56 of which graduated from high school or technical secondary school, accounting for 65.9%. Compared with workers of 41-50 years old, those of 21 to 30 have received higher education generally. So the educational attainment of personnel of SMEs

in the surroundings of Huangshan Scenic Spot is generally low, workers in their twenties being of relatively higher level of schooling than those in other age groups.

Table 46 Crosstab table of age and education

Education* Age cross tabulation								
		Age						Total
		<20	21-30	31-40	41-50	51-60	>60	
Education	Primary school or below	0	0	0	6	1	2	9
	Junior high school	1	8	10	12	0	0	31
	Senior high school or technical secondary school	3	13	5	8	3	0	32
	Junior college	1	3	5	0	1	0	10
	University graduate	0	1	1	0	0	0	2
	Postgraduate	0	1	0	0	0	0	1
Total		5	26	21	26	5	2	85

(5) A majority of personnel of SMEs are bosses.

84 questionnaires show the occupation of the respondents as in Table 47. Most are bosses of SMEs, 59 of them, accounting for 70.2%, then are partners, 17 of them, accounting

for 16.7%.

Table 47 Occupation of the sample

Position					
		Frequency	Percentage	Effective percentage	Accumulative percentage
Valid	Boss	59	69.4	70.2	70.2
	Partner	14	16.5	16.7	86.9
	Staff	11	12.9	13.1	100.0
	Total	84	98.8	100.0	
Missing	System	1	1.2		

(6) Experience before starting a SME.

From the cross tabulation as to whether they, before starting a SME, have had tourism-related experience or entrepreneurial experience, 24 people of the sample, with a proportion of 28%, have neither of the experiences, fewer than those, 31 of the sample, with both experiences, accounting for 36.5%. 72% of personnel of SMEs have one of the two experiences or both.

Table 48 Cross tabulation on tourism-related experience and entrepreneurial experience before starting a SME

		Entrepreneurial experience		Total
		Yes	No	
Tourism-related experience	Yes	31	17	48

	No	13	24	37
Total		44	41	85

3.2 Operational features of SMEs

(1) Most SMEs operates independently

From Table 49, of 82 interviewees who answered the nature of their business, 70 run their SMEs independently in the neighboring communities of Huangshan Scenic Spot, accounting for 85.4%.

Table 49 Nature of the businesses

		Fre quency	Percen tage	Effective percentage	Accumulative percentage
Valid	Run business independently	70	82.4	85.4	85.4
	Run business in partnership	12	14.1	14.6	100.0
	Total	82	98.8	100.0	
Missing	System	3	3.6		
	Total	85	100.0		

(2) Most SMEs rent their housing

From 85 questionnaires telling the housing of SMEs, as shown in Table 50, most SMEs, 54 of them, rent their housing, accounting for 63.5%. Then are 30 people who use their own house, accounting for 35.5%.

Table 50 Housing of the businesses

		Frequency	Percentage	Effective percentage	Accumulative percentage
Valid	Rental housing	54	63.5	63.5	63.5
	House of one's own	30	35.3	35.3	98.8
	Public Housing	1	1.2	1.2	100.0
	Total	85	100.0	100.0	

(3) Tourism goods sales are a main source of SME revenue

The 85 questionnaires shows that, see Table 51, 32 of SMEs or 37.6% of them earn most of their money from selling tourism goods, then 22% from catering and 17% from lodging. Some SMEs provide for both food and accommodation. Others provide clothing, retailing or processing services. 89.3% of the SMEs being interviewed depend mainly on tourism goods sales, catering and lodging.

Table 51 Major income source of the SMEs

		Frequency	Percentage	Effective percentage	Accumulative percentage
Valid	Ticket	1	1.2	1.2	1.2
	Transportation	2	2.4	2.4	3.5
	Tourism goods sales	32	37.6	37.6	41.2
	Store renting	1	1.2	1.2	42.4

	Accommodation	17	20.0	20.0	62.4
	Others	5	5.9	5.9	68.2
	Catering	22	25.9	25.9	94.1
	Accommodation and catering	5	5.9	5.9	100.0
	Total	85	100.0	100.0	

(4) The period for establishment of most SMEs are less than a decade

84 questionnaires show the time of establishment of SMEs. As shown in Table 52, the SMEs being investigated were established in between year of 1985 and 2014, about 30 years. A smallest number of SMEs were established in the 1980s, accounting for 3.6%, and SMEs established in the 1990s account for 8.3%. The number of SMEs established in the 2000s and 2010s are same, both accounting for 44.1%.

Table 52 Time of establishment of the SMEs

Established in					
		Frequency	Percentage	Effective percentage	Accumulative percentage
Valid	2014	10	11.8	11.9	11.9
	2013	2	2.4	2.4	14.3
	2012	12	14.1	14.3	28.6
	2011	4	4.7	4.8	33.3
	2010	9	10.6	10.7	44.0
	2009	5	5.9	6.0	50.0

	2008	9	10.6	10.7	60.7
	2007	2	2.4	2.4	63.1
	2006	2	2.4	2.4	65.5
	2005	3	3.5	3.6	69.0
	2004	2	2.4	2.4	71.4
	2003	3	3.5	3.6	75.0
	2002	2	2.4	2.4	77.4
	2001	3	3.5	3.6	81.0
	2000	6	7.1	7.1	88.1
	1999	1	1.2	1.2	89.3
	1998	1	1.2	1.2	90.5
	1995	1	1.2	1.2	91.7
	1994	1	1.2	1.2	92.9
	1993	1	1.2	1.2	94.0
	1992	2	2.4	2.4	96.4
	1988	1	1.2	1.2	97.6
	1987	1	1.2	1.2	98.8
	1985	1	1.2	1.2	100.0
	Total	84	98.8	100.0	

Missing	Syste m	1	1.2		
Total		85	100.0		

(5) SMEs basically have no more than 7 employees

From 84 questionnaires, as in Table 53, the numbers of employees of the SMEs investigated range from 0 to 14. SMEs with less than 7 workers are in the majority, accounting for 91.8%. 21 of SMEs have 2 workers, 16 have 3, and 20 have 4, accounting for 24.7%, 18.8% and 23.5% respectively.

Table 53 The number of employees of the SMEs

		Fre quency	Percent age	Effective percentage	Accumulative percentage
Valid	0	1	1.2	1.2	1.2
	1	8	9.4	9.4	10.6
	2	21	24.7	24.7	35.3
	3	16	18.8	18.8	54.1
	4	20	23.5	23.5	77.6
	5	7	8.2	8.2	85.9
	6	5	5.9	5.9	91.8
	7	1	1.2	1.2	92.9
	8	3	3.5	3.5	96.5
	10	2	2.4	2.4	98.8

	14	1	1.2	1.2	100.0
	Total	85	100.0	100.0	

(6) Summary

As for demographic features of SMEs, according to the cross tabulation on age, education and occupation, 41 of the respondents are bosses of 21 to 50 years old graduating from high school or technical secondary school, accounting for 48.2%, almost half of the personnel investigated. Personnel of other features are smaller in number and dispersed in characteristics

Table 54 Cross tabulation on age, education and occupation

			Education						Total
			Primary School or below	Junior high school	Senior high school or technical secondary school	Junior college	University graduate	Postgraduate	
Boss	Age	<20	0	1	1	0	0		2
		21-30	0	6	6	1	1		14
		31-40	0	9	3	2	0		14
		41-50	6	10	7	0	0		23
		51-60	1	0	3	0	0		4
		>60	2	0	0	0	0		2

	Total		9	26	20	3	1		59
Partner	Age	<20		0	1	0	0		1
		21-30		0	4	1	0		5
		31-40		1	1	3	1		6
		41-50		0	1	0	0		1
		51-60		0	0	1	0		1
	Total			1	7	5	1		14
Employee	Age	<20		0	0	1		0	1
		21-30		2	3	1		1	7
		31-40		0	1	0		0	1
		41-50		2	0	0		0	2
	Total			4	4	2		1	11

As for operational features, according to cross tabulation on the number of employees and major income source, A majority of SMEs, 53 of them, are with 2 to 4 employees and whose main source of income are tourism goods sales, accommodation and catering, accounting for 62.4%. SMEs of other features are smaller in number and dispersed in characteristics.

Table 55 Cross tabulation on the number of employees and major income source

		Major income source								Total
		Ticket	Transp	Touris	Store	Acco	Othe	Cater	Acco	

			ortatio n	m goods sales	renti ng	mmo datio n	rs	ing	mmo datio n and cateri ng	
The number of employe es	0	0	0	1	0	0	0	0	0	1
	1	1	0	4	0	0	3	0	0	8
	2	0	0	10	0	3	2	5	1	21
	3	0	0	8	1	4	0	3	0	16
	4	0	0	6	0	5	0	9	0	20
	5	0	1	1	0	2	0	1	2	7
	6	0	0	1	0	1	0	2	1	5
	7	0	0	0	0	0	0	1	0	1
	8	0	1	0	0	1	0	0	1	3
	10	0	0	0	0	1	0	1	0	2
	14	0	0	1	0	0	0	0	0	1
Total		1	2	32	1	17	5	22	5	85

4 Social responsibility of SMEs

4.1 Products and services

75.3% of interviewees think that their shops are manufacturing new products and delivering new services constantly. 96.4% think that their shops keep improving the quality of

their products and services. 95.3% believe their products and services, safe and healthy, are of reliable quality. 96.5% consider the prices of their products and services reasonable, and 94.1% say they will try their best to provide customers with information they need. Statistics show that most of interviewees believe they perform well in and are constantly improving the quality of products and services and the prices are reasonable. However, they lack such ambition for new products and services as they have for the quality of products and services, which suggests some SMEs don't realize the importance of new products and services or that they don't know what new product or service to produce, which may lead to the aggravation of homogeneity between SMEs in the neighborhood of Huangshan.

4.2 Conservation of the local environment

64.7% of interviewees think their shops rely heavily on the local environment as well as the support of local residents and governments. 77.1% think they should use green energy such as solar and wind energy. 91.8% believe facilities and materials used in their shops should comply with environmental regulations and standards. 82.3% think they should use energy-saving and water-saving equipments like energy-saving lamp and sensor faucet. 75.3% believe they should distribute waste into paper, metal, kitchen waste, etc. 55.3% think they should recycle resources including paper and water. And 78.8% believe they should avoid the use of environmentally harmful cleaning products and disposables. Statistics show that some people in SMEs don't care much about the local environment. Though most people observe environmental regulations and standards consciously, but personnel of SMEs pay less attention to such programs, which are not under mandatory supervision of governments, as environmentally friendly energies, energy efficient devices and garbage sorting, and especially recycling. Only 55.3% think they should do the recycling.

4.3 Labor treatment

92.9% of interviewees think shops shouldn't delay salaries. 95.3% believe they should get reasonable salaries. 92.9% think shops should provide women equal opportunities for job. 85.7% believe shop's timing schedules should allow employees to combine family life and career. 87% think shops should notice staff's situation and help them tide over their difficulties. Statistics show that most personnel of SMEs have much stronger awareness of the

timely payment of their proper salaries and equal rights for women at work than that they should help workers balance family and work and overcome their difficulties.

4.4 Attachment to the local

62.3% of interviewees think their shops depend heavily on the support of local residents and governments. 70.6% believe they should make contribution to the local development like donation. 40% think they will buy local products, if possible, despite higher prices. 69.4% believe they should actively support and participate in local major activities like traditional festivals. 53.3% think shops should employ local residents. It can be seen that staff of most SMEs pursue the maximizing of profits, and they won't support products just because they are local or try to recruit local people. But they most are willing to contribute to local development and take part in local activities. In contrast to products and services, protection of local environment and staff treatment, SMEs awareness of depending on the local is weaker. During the interviews, we found quite a few people complain about government's inaction. And governments should more discuss matters over tourist programs in local communities, and encourage SMEs to follow the principle of fair trade, purchase local products as far as possible, and absorb more business service offered by local people.

5 Brand awareness of SMEs

5.1 Actual situation

74.1% of interviewees think their shops should have characteristics that distinguish themselves from other shops in decoration, products and services. 83.5% believe a unique shop brand helps attract more consumers. 94.1% think products and services of uniqueness and high quality create repeat customers. 91.8% believe it's very important to keep improving the quality of products. 92.4% think shop brand and trademark are protected by law. Statistics show that staffs of most SMEs have realized the importance of branding and special services and that brand and trademark should be protected by law. But some interviewees said "no" to whether a shop should have distinguishing characteristics.

91.6% of interviewees consider their products and services in conformity with local characteristics. 47.1% think there are not many products and services of their shops locally. 84.7% think they mainly use distinctive products and services to attract customers. 50.6%

believe they have fees used exclusively for brand building. 57.7% think they have propagated their brand and characteristics through advertising. Most of personnel of SMEs have realized the importance of branding and special services and that they shops go well with local characteristics but lack special products and services. What's worse, these SMEs still haven't spent money on the building of shop brand nor propagating their own brand and characteristics through advertisements. According to the interviews, some works of SMEs think even if they have built up a good corporate brand with special services and products today, tomorrow other SMEs will definitely copy that, therefore making special services and products not special any more.

5.2 SMEs' views on development prospect

87.1% of interviewees say they want to keep running their shops. 77.6% say believe these small and medium-sized shops will have a better future. 92.9% hope the environment for doing business will be improved. 50.6% think the improvement of environment for doing business primarily relies on the government. While 70.6% think it depends on the cooperation between shops. 87.1% believe, the better tourism develops, the better prospect for business. 78.8% hope they will get more help from the government.

According to Statistics, most of interviewees are willing to go on running their shops, but fewer of them think there is a better development prospect. A vast majority of interviews hope the environment for doing business will be improved. More people believe the improvement of business environment counts on the cooperation between shops than on the government, indicating that interviewees doubt the ability of government to improve the environment for doing business but still hope to get more help from government in the future. Meanwhile, a lot of interviews think the future development of SMEs still depends on the development of local tourism and that the development of Huangshan tourism is quite influential in the development prospect of SMEs surrounding Huangshan.

6 Conclusion and discussion

On the supply of products and services, SMEs focus on traditional cuisine and offer the same products. For the pursuit of new products and services, SMEs around Huangshan are underdeveloped in awareness of social responsibility and brand building. Plagiarism is a serious problem there. SMEs are reluctant to put in time and money on the innovation of products and services. As a result, homogeneity of products and services increases which is

bad for the establishment of brand awareness.

On the conservation of environment, over half of the SMEs around Huangshan engage in accommodation, catering and other industries which cause great impact on environment. Most SMEs consciously observe environmental regulations and standards, but pay less attention to programs not mandatorily supervised by the government.

On staff treatment, with good consciousness, SMEs around Huangshan timely pay reasonable salaries, advocate women's equal rights at work and allow workers to balance family and career. And the fact that the sex ratio in SMEs is harmonious demonstrates that most SMEs not only pursue women's equal rights at work on their consciousness but actually do so.

On the overall tourism development of Huangshan city, personnel of SMEs show little concern. Though most of them are locals in Huangshan city and realize that the development of their business relies heavily on the overall development of Huangshan tourism, their priority is to realize their own interest to a maximization degree, lacking awareness of relations between self development and social responsibility.

On continuous operation, SMEs, though discontented, will still keep on running. Over half of the SMEs are not satisfied with the present situation, but more are willing to get their business rolling, suggesting that SMEs still look forward to the promising future of Huangshan.

Study III Analysis on the present situation of tour guides

1 Background

Tour guides is one of the groups who witness Chinese tourism development. Over more than 30 years of tourism development, the profession of tour guides has undergone a great change from being respected, earning more money, pursued by many people to today's less glorious social image of high turnover rate. In recent years, the implementation of the “The Eight Rules” and the adoption of a new “Travel Act” have been greatly affected Chinese tourism. As tour guides are bound up with tourism, the effect on them is self-evident. Tour guides, as one of many interest groups in local tourism development, with long-term experience with tour groups, has more opportunities to contact scenic spots and thus can find some hidden problems of those scenic spots. Mt. Huangshan as a earlier, high-profile tourist attraction in China, learns more about tour guides’ views on tourism development in order to find some problems of tourism development that can help the sustainable development of Mt. Huangshan.

2 Research process

The interviews with tour guides started on the afternoon of July 4 and ended on the afternoon of July 6 at Huangshan Mercy Light Pavilion, with the purpose of learning tour guides’ views on Huangshan tourism development in recent years, on the phenomena of “free charge tour” and “minus fee tour” and on the profession of tour guides. The major specific topics include the following four:

- (1) Basic information of the interviewees.
- (2) How do you think about Mt. Huangshan Tourism Development in recent years?
(You can talk in terms of resource quality, management , service and reception facilities)?
- (3) How do you think of such phenomena as “free charge tour” and “minus fee tour”?
- (4) How do you think about the profession of tour guide?

Table 56 Basic information of the interviewees

Number	Sex	Native place	Years of being tour guide	Main route	Group situation	Perception of the busy season in Mt. Huangshan
1	Male	Henan	18 years	Mt. Huangshan and nearby attractions, such as Qiandao Lake, Hangzhou, Xidi and Hongcun	48 people, not group of individual tourists	More tourists in July and August, three-day Tomb Sweeping Day Holiday and National Day Holiday than the May Day Holiday
2	Female	Unknown	8 years	Routes across the country	Not group of individual tourists	Have no idea
3	Male	Huangshan	8 years	Mainly Mt. Huangshan	Group of	Unknown

				route	individual tourists	
4	Male	Unknown	5 years	Mainly Mt. Huangshan route	Unknown	More self-drive tourists than tour groups in April, May, July, August, October and Spring Festival
5	Male	Unknown	This year	Mainly Mt. Huangshan route	Group of individual tourists	Have no idea
6	Male	Huangshan	15 years	Mainly Mt. Huangshan route	45 people , not group of individual tourists	Unknown
7	Male	Huangshan	16 years	long-distance group, besides Huangshan, also Nanjing, Suzhou, Shanghai, cross province	47 people , not group of individual tourists	Unknown

8	Male	Henan	8 years	Mainly Mt. Huangshan route	46 people, not group of individual tourists	Most people in April
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3 Evaluation of Huangshan tourism development

8 interviewed tour guides have slightly different and complementary opinions of Huangshan tourism development in recent years.

(1) On tourist structure, group tourists lessen, and self-driving tourists and individual tourists increase.

Most of the respondents said that Mt. Huangshan tourism is more and more popular, with the number of tourists increasing in recent years. But tourist structure has undergone a great change: fewer and fewer tour groups, more and more self-driving tourists and individual tourists. Prohibition of "three public consumptions" is the main reason, and the increase in private cars and improvement of the quality of visitors also lead to this change.

"Mt. Huangshan tourism is more and more popular. According to the statistics of Mt. Huangshan, the number of tourists is still growing. Mainly due to the political reason—the prohibition of "three public consumptions", Mt. Huangshan has less tour groups in these two years. Units used to see travelling as a benefit for employees. But now that supervision is tightened, heads of offices dare not. In the past, 60 to 70 percent of tourists at any scenic spot were unit groups. Now numbers of self-drive and individual tourists grow".

----- (Interviewee 1)

"I used to tour 6-7 groups in one month, now just 3-4 groups. There used to be many people in one group. Now sometimes there are only 7-8 people in one group. Both the quantity and quality of tour groups decrease".

----- (Interviewee 2)

(2) High satisfaction with service and reception facilities

All interviewees think highly of the quality of Huangshan tourism resources. 37.5% of interviewees intimated that Mt. Huangshan sanitation is better than other scenic spots, but has fewer toilets which are far away from each other, causing tourists inconvenience.

The supply of accommodation and dining is tight in the busy season, but abundant usually. So people are not unsatisfied with but understand this phenomenon. They actually quite like the food and beverage there thought to be good and cheap.

"Service and reception facilities, accommodation and food are good. It's normal and

inevitable that rooms and food run short in the busy season. Fortunately this is not much of a problem”.

----- (Interviewee 3)

“Accommodation is good and cheap. The exception happens in May Day holiday and National Day holiday when rooms run short for one night or two. Everything else is ok”.

----- (Interviewee 3)

“Huangshan’s catering is probably the best in the whole East China, better than that of other similarly priced scenic spots in Yunan province, Beijing and Hainan province. Ordinary customers have not many opinions after eating there. If you can’t eat well in Huangshan, you can eat nothing elsewhere”.

----- (Interviewee 4)

(3) Awareness of safety, maintenance and ability of handling emergency are enhanced, but employees’ quality of services remains to be improved.

Taking about changes taking place in Huangshan in recent years, issues reported by interviewees are focused on Huangshan Scenic Spot’s awareness of safety, maintenance, service and ability of handling emergency, which, according to interviewees, are increasing.

“Safety awareness here is probably the best among all scenic spots in China. There were no iron railings in front of the ticket-office before. When the policy of golden week was first carried out and there were too many tourists, ropes were pulled in the shape of a flared bell and armed police stood hand in hand at the gate to keep order. After dark, Tourists, feeling anxious, began to buy tickets in a crazy manner. It was very likely to cause stampedes. The next year, realizing this danger, the scenic spot began to use iron railings”.

----- (Interviewee 5)

“Facilities are ok. There is a special construction brigade whose one of tasks is to repair and preserve paths needing repairing. It’s not right to only make money. Maintenance is also necessary, otherwise tourist experience will be terrible”.

----- (Interviewee 5)

“There used to be only a few tour buses. So when too many tourists came, people would

have to wait. After many years of golden weeks, lessons have been learned. National Express, a national chain company, will send more buses from all over the country when a golden week begins and withdraw them when it's over. It develops a emergency preplan”.

----- (Interviewee 3)

As for service awareness, there are more negative comments than positive ones from interviewees, concentrating on the service attitude and awareness of workers at hotels and ticket-offices.

“The staff of hotels on Huangshan is not hospitable enough. For example, staffs in Baiyun hotel would lose their patience when there are many guests”.

----- (Interviewee 2)

“It is not efficient to buy tickets. There sometimes is only one ticket window available even though there are actually three and some other staff are idling their time away”.

----- (Interviewee 6)

“There is a big problem with their service attitudes toward both guides and travelers. They behave themselves better when there are leaders around--so-called face-saving project. It's ok as long as there is no serious problem”.

----- (Interviewee 6)

(4) The paths are not rational, cableway capacity is improved

Besides, an interviewee says that travel paths are not built rationally, not really taking into consideration tourists' needs. Paths connecting as many tourist sites as possible fail to enable tourists to fully enjoy the most beautiful scenery of Mt. Huangshan, and there are interest relations at some of those connections. Also, the interviewee says the indistinction between the function of the government and enterprises suppresses appeals from tour guides, and that the scenic spot is “bullying clients”.

“Routes are not reasonable. Tourists of one day trip can only spend a little more than 4 hours visiting the mountain. The current routes contain 15 tourist sites, impossible for them to visit them all. Some leaders like 5, 8, 10 or even 12 tourist sites. But there is no need to do so just for the sake of a number. These route planners, though maybe living in Huangshan for a long time, still do not know Mt. Huangshan very well. They did not see Huangshan from the perspective of tourists. For example, all routes turn to Beihai Hotel which is only a hotel, while missing the most beautiful site

of Huangshan. They manage not for tourism, but for leaders”.

----- (Interviewee 6)

“It is Huangshan Tourist Bureau that is supposed to administrate and supervise tour guides. But Huangshan Scenic Spot specially established a Tourism Office to make some rules for tour guides and to set routes, ignoring the needs of tourists and ideas of tour guides who may get into trouble if not following their routes”.

----- (Interviewee 6)

“A monopoly runs businesses, tickets and cableways here. It’s useless to report your dissatisfaction with dining and lodging of the scenic spot to the Tourist Bureau which, inferior to the Tourism Office, has no right over it. There is no clear line between the function of the government and enterprises. They are both enterprises and government departments”.

----- (Interviewee 7)

All 8 interviewees talked about the problem of lining up for cableway. Some of them say that, compared with the past, Huangshan cableway has been improved a lot in terms of passenger capacity per unit time. But long queues are still inevitable in the busy season, reducing tourist experience to some extent.

“You have to wait long before getting into a cable car every weekend”.

----- (Interviewee 5)

“The previous cableway was introduced from Japan, admitting 40 persons one time, costing queues of several hours. Tourists complained about the long queues and that walking was faster than using cableway. Now advanced cableway has replaced the old ones. Two cable cars run on both directions and will speed up when the number of passengers increases. The current Yuping Cableway can transport over 1000 people within one hour”.

----- (Interviewee 5)

(5) Huangshan Scenic Spot is harsh but kind to tour guides

Some interviewee uses “harsh but kind” to describe Huangshan Scenic Spot’s attitude toward tour guides, with “harsh” reflected in the rules for riding cableway and “kind” in higher guiding fees than other scenic spots.

“Tour guides without 12 tourists are not free of charge for riding cableway. The rule has always been there, 16 required originally. Sometimes, in order to get into a cable car free of charge, a tour guide with less than 12 tourists work it out by buying tickets and then selling them to individual tourists. You can not see this happen in other scenic spots of the country. Only Huangshan cableway demands a certain amount. Cableway elsewhere is free”.

----- (Interviewee 3)

4 Attitudes toward “free charge tour” and “minus fee tour”

Interviewees are in agreement on “free charge tour” and “minus fee tour”, thinking that this phenomenon is abnormal and thus should be resolutely prohibited.

First, it is detrimental not only to the interests of tourists, but also to the social images of guides as well as increasing pressure on them. At the same time, a small amount of respondents point out that although this phenomenon is neither healthy nor normal, we cannot put all the blames on tour guides for in some cases it is because some tourists are keen on gaining petty advantages.

At present, the introduction of the "Travel Act" to some extent has curbed this phenomenon, and, coupled with the pursuit of high quality travelling and strengthening of awareness of laws among tourists, the zero/negative tour fee phenomenon will be lessen. However, the obsession with petty advantages, which is related with the current situation of China, is difficult to change in the short run. There would be always a supply if the demand continues to exist. Consequently, zero and negative tour fee has not been fundamentally eliminated yet.

When asked whether this phenomenon exists in Huangshan, eight respondents say that basically there is no such phenomenon, holding that Huangshan does better in this aspect. In addition to establishment and enforcement of laws and attention given by leaders of Huangshan city, there are several other reasons as follows:

(1) The income of tour guides in Huang Mountains is relatively higher;

“Different from other resorts, guides in Huangshan earn service and guide fee by climbing mountains. Their incomes are quite good, much better than those in other places where guides have no base wages. Guides here have base wages paid by travel agencies”.

----- (Interviewee 8)

(2) Strict price controls on entry tickets, cableway tickets and accommodation;

“The reason why these are no such phenomena as “no charge tour” and “minus fee tour” in Huangshan is because of monopoly and rigid control on prices. Huangshan is the earliest scenic spot to stop selling group tickets for entry or cableway tickets. The price stays the same, whether it is sold in one or in dozen. There is no difference between wholesale and retail prices, leaving guides no way to earn money from this”.

----- (Interviewee 6)

(3) Huangshan tourism is a seller's market;

“Average scenic spots look to travel agencies for help, but travel agencies turn to Huangshan Scenic Spot for help, especially in the busy season when rooms are difficult to get. Given the fact that prices are dead, I can give these rooms to you or to him, depending on who behaves well in usual time and who has good relationships with me. It's hard to survive, if you don't behave yourself usually”.

----- (Interviewee 6)

(4) Huangshan people's conscientious protection of Huangshan image

“Especially in terms of order, both on top and at the foot of the mountain, Huangshan people including tour guides will not cheat tourists or buy or sell by coercion”.

----- (Interviewee 3)

“Huangshan tour guides have this awareness. 70% of the annual revenue of and two thirds of people employed in Huangshan city depend on tourism. So everyone try his or her best to protect the image of Huangshan, try to reduce complaints from tourists. When you ask a tour guide for directions, he or her will tell you earnestly even though you are not one of them”.

----- (Interviewee 3)

5 Views on profession of tour guides

Respondents said that guides are treated badly, a group in need of social attention.

Half of the interviewees described their living state as “odd jobs”: no five insurances (medical insurance, old-age insurance, unemployment insurance, industrial injury insurance and child-bearing insurance), no stable incomes. Incomes for tour guides consist of basic wage, guiding fees and profit. However, at present, many travel agencies in China don't pay the basic wage to

tour guides, only guiding fees which depend on the number of days when they guide tours and the number of tourist sites they visit, so incomes for guides is very unstable. As for profit, it is not percentage deducted from shopping, but rebate given to guides by scenic spots, not harming the interest of tourists, which tourists do not understand and thus misunderstand tour guides who feel wronged. Besides, tourism is of obvious seasonality, so nowadays tour guides do not make much money on average.

The improvement of the quality of tourists makes higher demand on the qualification of tour guides, but their treatment isn't improved enough, This has also caused the imbalance of tour guide innermost feelings to certain degree. Small differences in the treatment of senior, intermediate and junior tour guides also dampen tour guide's enthusiasm.

Some interviewees say that, given the low and unstable wages for tour guides as well as the toil of constant moving- around, they are changing job now. But they also say that it is difficult and takes time to do so, because they have no other expertise or specialty and they are used to the freedom and random of being a tour guide. But on the whole, the turnover of tour guides is relatively high.

6 Conclusions and suggestions

Generally speaking, interviewed tour guides consider Mt. Huangshan Tourism Development shows an increasing tendency, the protection of resources is fruitful, the infrastructure and tourism facilities are fairly complete, but staff's quality of services remains to be improved.

Most of respondents think that "free charge tour" and "minus fee tour" must be banned. The follow-up effect remains to be seen, though the new "Travel Act" curbs this phenomenon to a certain extent.

In recent years, the social image of tour guides has been severely damaged, low salary and terrible living state. The turnover of tour guides is on the increase.

Therefore, the following suggestions are raised:

Strengthen education and training for employees of the scenic spot, set up a system of rewards and penalties so as to enhance employee's service consciousness;

Broaden the approach of information transfer, improving the efficiency of information transmission;

Explicit tour guide's salary and welfare, determine the incentive mechanism for promotion;

Legal regulations and supervision must not be relaxed.