阳朔旅游可持续发展

监测报告（中文版）

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第一章　前言

1.1 监测缘起

2002 年以来，随着桂林市旅游的大力发展，桂林逐步步入世界著名旅游目的地行列，桂林市政府也在不断加强与国际性旅游组织的联系与合作。2002 年博鳌亚洲旅游论坛的举办，以及 2003 年世界旅游组织在桂林举办的首次有关旅游目的地开发与管理地区合作问题的研讨会，均引起了国内外的广泛关注。2004 年桂林市与世界旅游组织签订了双方合作协议，在协议中首次提出将桂林阳朔定为世界旅游组织在全球的旅游观测点之一，并将阳朔的旅游数据纳入《世界旅游组织可持续性发展指标》(World Tourism Organization(2012), Indicators of Sustainable Development Tourism Destination – A Guidebook, UNWTO, Madrid)一书中。2005 年 7 月 26 日，世界旅游组织在阳朔正式设立了旅游可持续发展观测点，由中山大学负责技术监测，这是世界旅游组织在中国首个，也是世界上第一个旅游观测点。 中山大学旅游发展与规划研究中心自 2006 年 8 月与桂林市旅游局签订《阳朔可持续旅游发展指标监测》协议书以来，已经根据世界旅游组织 GOST 项目的指标与方法成功完成了阳朔 2006-2008 年的中英文监测报告；2009 年 10 月份，阳朔观测点正式建成并揭牌，标志着阳朔长期可持续发展监测工作的启动；2010 年 9 月 28 日，联合国世界旅游组织与中山大学签署合作协议，成立“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”（UNWTO Monitoring Center for Sustainable Tourism Observatories，UNWTO MCSTO），负责中国乃至将来的亚太地区旅游可持续发展观测点的管理与监测等技术工作，以保障监测工作持续、全面、有效地进行。这标志着监测中心实体机构的正式落成，也标志着中山大学与 UNWTO 在推动全球旅游可持续发展方面正式进入实质性合作阶段。2011 年 8 月、2012 年 8 月和 2013 年 7 月，监测中心又分别完成了三期阳朔旅游可持续发展监测。

本次阳朔旅游可持续发展监测（2014.7）是对以往监测的延续与深化，继续以《旅游目的地可持续发展指标使用指南》为基础，反映当前阳朔旅游的发展状况与旅游可持续发展中出现的问题，并适当提出了一些对策以期为当地旅游可持续发展提供帮助，努力为世界旅游组织及其他致力于旅游可持续发展研究的机构在相关指标应用方面提供参考。

1.2 监测过程

2014 年 7 月 5 日至 13 日，在桂林市旅游局的大力支持和阳朔县人民政府的积极配合下，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（UNWTO MCSTO）顺利完成了 2014 年阳朔可

持续旅游发展的监测工作。本次监测活动由中山大学旅游学院副院长孙九霞教授带队，监测小组由 2 名博士生，4 名硕士生及 13 名本科生共 19 人组成。

监测活动共为期 9 天，监测小组先后考察了西街、十里画廊（蝴蝶泉、图腾古道、大榕树、聚龙潭、金水岩、月亮山）、遇龙河、世外桃源等阳朔重点旅游景区，同时调查了历村、旧县村、遇龙河一带的自然村、兴坪古镇等旅游社区以及阳朔城区，面向中外游客、社区居民、旅游小企业主及员工开展问卷调查与随机访谈，共获取有效问卷 1885 份，其中国内游客问卷 820 份，国外游客问卷 280 份，社区居民问卷 500 份，旅游小企业主问卷 85 份，员工问卷 200 份。除派发问卷和访谈外，7 月 11 日，监测小组对阳朔县城内的商业业态进行调查，主要对县城内 26 条主次干道沿街的店铺进行普查，对店铺的名称、店铺的类型、店铺的功能等进行登记，共获取 2000 多家商铺基本信息。7 月 12 日，监测小组分别走访了阳朔县旅游局、地税局、工商局、公安局、国土资源局、环保局、气象局、卫生局、文体局等政府部门，收集相关二手资料。此外，本次监测活动增加了“寻找阳朔故事”的内容，监测小组专门对阳朔旅游知名人物月亮妈妈、陆家华、Annabelle 等人进行深度访谈，撰写人物故事。

除常规监测工作外，本次监测还穿插了与当地政府与企业较为深入的面对面交流活动。7 月 6 日，孙九霞教授、观测点刘洪发老师与阳朔县旅游局领导举行座谈，对阳朔监测活动未来的组织安排、阳朔旅游发展等问题交换了意见。7 月 8 日上午，监测小组参观了阳朔世外桃源景区，桂林市台商投资协会会长、世外桃源景区总经理江文豪先生为监测小组进行实地案例教学，分享世外桃源景区文化创意与标准化服务等成功的管理模式和管理经验。8 日下午，监测中心与阳朔旅游局共同举办了“阳朔小微企业沙龙：国内外旅游新动向”沙龙活动。沙龙由孙九霞教授主持，阳朔县旅游局代表和部分阳朔小微企业业主、社区精英（如李莎大酒店老板李莎夫妇、秘密花园老板疯子鹰、玫瑰木商行老板黄家磊、西街外语学校校长欧晋等）等参与了本次沙龙活动，旨在通过小微企业的视角探讨当前阳朔旅游发展所面临的问题，为探寻阳朔未来的旅游发展道路出谋献策。监测小组也参与了本次沙龙。沙龙中，各小微企业主就其在旅游参与中所发现的问题各抒己见：外国投资者 Roland 一针见血地指出阳朔原本友好、淳朴的感觉正在丢失，面临着商家不了解游客的需求，游客不相信旅游服务者的尴尬局面；户外运动策划公司老板西唐提到阳朔具有丰富的户外旅游资源，攀岩线路更是全国之最，但其惋惜地表示阳朔从未推广过户外体验式旅游的品牌，应借助赛事、活动等事件营销来推动地方的形象提升与推广；与会的其他精英也就阳朔县城交通拥堵、服务人员流动率高、各酒店内部服务标准不一、全民无序参与旅游等问题进行了探讨。阳朔文联主席莫高阳表示政府应该转换发展的思路，注重提升自身的管理和服务品质，同时找回地域文化对旅游的支持，去掉伪民俗，寻回阳朔原本的“脸谱”；阳朔旅

游局前局长周训林指出当前政府应该对阳朔的资源进行整合与再利用，此外沙龙对阳朔未来向定制化、体验式的旅游发展模式进行转型升级达成了共识。

7 月中下旬，监测小组基于《旅游目的地可持续发展指标使用指南》中的内容和指标，根据已有研究，在实地考察数据、访谈材料、问卷统计分析以及二手资料的基础上，撰写监测报告。本监测报告共分为前言、旅游与社区、游客满意度、健康与安全、旅游规划与控制、旅游经济效益、旅游与资源环境保护、旅游产品与服务以及结论九个部分。

本次监测基本沿用 2013 年的监测主要问题与指标筛选，列表结合 WTO 指标方法、过往阳朔监测指标以及 2013 年阳朔旅游发展实际情况而制定，涵盖了此次阳朔旅游可持续发展监测的主要问题与基本指标。

表 1-1 阳朔旅游可持续发展监测主要问题和基本指标汇总

部分	主要问题	监测的基本指标
旅游与社区	居民对旅游影响的总体感知	旅游业与当地
		旅游业与自身
	旅游对当地社区的经济影响	就业
		收入
		生活与消费水平
	旅游对当地的社会文化影响	治安
		社区生活
		主客关系
		传统文化与手工艺
	旅游对当地环境影响	环境污染
		环保意识
	社区参与程度和意识	景区与社区和谐
		建言献策
		可持续发展意识
游客满意度	旅游资源评价	资源特色
		资源保护
	旅游服务评价	景区服务

		餐饮服务
		住宿服务
		交通服务
		购物服务
	整体环境评价	自然环境
		人文环境
健康与安全	健康	食物卫生
		环境卫生
	安全	医疗安全与疾病控制
		公共安全
		游客关注
	当地治安	治安问题
		游客感知
旅游规划与控制	旅游交通规划与控制	道路标准
		客运站标准
		游客交通工具（偏好）
		旅游服务设施与县内交通用地规划
	旅游资源规划与控制	核心吸引要素的开发
		观光景点人流量的控制
		建筑景观风貌控制
		总体战略层面各类用地控制现状
	土地旅游利用情况	旅游发展空间布局规划与用地控制
		主要旅游乡镇的土地利用情况
		土地转换与新增旅游用地
旅游的经济影响	旅游收入	旅游统计数据（旅游总收入、游客数量、床位数、平均停留天数、过夜人数等）
	旅游对阳朔 GDP 及财政的贡献	旅游收入在 GDP 中的比重
		旅游收入对财政税收的贡献

	旅游对产业结构的影响	旅游带动的第三产业的总体发展趋势（企业的所有制、外来业主的比例）
		旅游发展对阳朔农业产业结构的影响
	旅游对阳朔手工商业发展的影响	旅游促进的住宿餐饮业发展趋势
		旅游促进的手工艺品及特色农业发展趋势
	旅游对阳朔社会就业的影响	旅游创造的就业机会现状
		旅游企业的竞争状况
		旅游带动的居民培训及相关技能提升（县城范围内英语培训机构的数量，企业对就业人员英语技能的要求）
		旅游对员工薪酬水平和满意度的影响
	旅游对阳朔投资的影响	县投资促进局数据、业主对投资状况的感知
	旅游季节性	旅游统计数据（入住率、月份游客数量）
		企业淡旺季
		旅游季节性对就业的影响
旅游与资源、环境保护	大气环境	空气质量与达标情况
		居民与游客感知评价
	水资源利用与水环境保护	水资源利用与保护
		居民与游客感知评价
	噪音环境	噪声控制情况
		居民与游客感知评价
	固体废弃物	固体废物处理情况
		居民与游客感知评价
	旅游对景观及视觉影响	是否配合旅游发展进行景观与视觉改造控制
		居民与游客感知评价
	能源管理	采取节能措施的企业比例与措施类型

旅游产品与服务	游客对旅游产品的预期	游客到阳朔旅游的目的
		游客预计在阳朔停留的时间
	游客对旅游产品的选择	吸引游客的店铺
		旅游商品的消费情况
		游客对旅游景点的选择
	旅游服务的范围	旅游目的地基本的旅游服务硬件设施类型
		旅游服务硬件设施的分布
	目的地形象/游客对旅游产品的响应	游客获取目的地的信息的渠道
		游客期望获取的目的地信息
		游客重游的意愿
		游客推荐其他人来阳朔旅游的意愿

第 2 章　旅游与社区

2.1 总述

此次监测针对居民共派发了 500 份问卷,回收有效问卷 468 份,有效率为 93.6%。问卷派发时间为 2014 年 7 月 5 日至 7 月 12 日，共持续 8 天。派发地点包括阳朔县城区的西街、桂花路、抗战路、阳朔公园、府前路、石马圆盘、夏棠码头、旧县等区域。

居民问卷涉及居民影响感知和人口统计学特征两个方面，其中居民影响感知采用李克特五级量表法，1—5 表示同意程度，1 表示非常不同意，2 表示不同意，3 表示没影响，4 表示同意，5 表示非常同意。在派发问卷过程中，多数问卷由居民自行填写，少数居民在填写问卷时有一定困难，则由调查人员在旁指引，采用访谈的方式辅助完成问卷，保证问卷的有效性。居民问卷由五个部分组成，一是居民对阳朔旅游发展的总体感知，二是居民对旅游的经济影响感知，三是居民对旅游对当地社会文化影响感知，四是居民对旅游环境方面的感知，五是受访者的个人基本信息收集。

根据收集到的问卷数据反馈得出的初步结果显示：居民普遍认为旅游业能带动当地经济的发展，但当地的自然环境也会受到一定的破坏。尽管阳朔居民对旅游业发展持支持态度，但其满意度却是较低，且呈现逐渐降低的趋势。当地居民的受教育程度低及商业意识的单薄，很大程度上限制了他们深入旅游行业。大多数的居民认为，阳朔旅游发展较快了文化的交流，伴随着当地文化活动和节庆活动的增多，更多的人参与到弘扬传统文化当中。

2.2 社区监测指标

本文以联合国《旅游目的地可持续发展指标使用指南》为参考，结合阳朔旅游发展的实际情况做出适当的调整，得出如下的社区监测指标，具体如下表 2-1 所示。

表 2-1 社区监测指标

主要监测方面	具体监测指标
居民对旅游影响的总体感知	旅游业有利于我们当地的发展
	我能从旅游业中获益
	对阳朔旅游发展的满意度
	继续支持阳朔发展旅游业
旅游对当地社区的经济	旅游发展带来了更多的就业机会

影响	旅游发展使经济收入增加
	我对自己的收入状况感到满意
	旅游业吸引力更多的投资与消费
	旅游发展使物价上涨
	旅游发展使房价上涨
	旅游使生活水平有了很大提高
	旅游只让少部分人受益
旅游对当地社区的社会文化的影响	旅游导致犯罪率上升
	旅游者打乱了我们原本的生活
	旅游限制了我使用旅游景区资源
	旅游使基础设施得到很大的改进
	旅游使医疗设施和服务得到很大的改善
	旅游使老房子拆迁、新房子数量增多了
	旅游促进了本地与外地的文化交流
	旅游使当地的自豪感与归属感增加
	民俗与传统文化被破坏和淡忘了
	旅游导致居民与游客的关系紧张
	旅游损坏了本地的道德风气
	文化活动或传统节庆增多
	更多人参与到传统文化弘扬中
	旅游促进了本地手工艺品发展
旅游对当地环境的影响	使空气污染加重
	使水体污染加重
	垃圾处理更及时有效
	使噪声污染加重
	使固体废弃物增多
	使社区、街道环境更干净了
	旅游使交通更拥挤
	宾馆及其他旅游设施破坏了景观美感

	我认为保护自然环境很重要
社区参与程度和意识	我愿意主动为景区发展提出建议
	景区做一些决策时会听取我们的意见
	我获得了政府实施的政策方针相关信息
	社区居民从事旅游相关工作的比例与主要类型
	社区居民对“旅游可持续发展”概念的感知度
	社区居民所关注的旅游发展相关问题

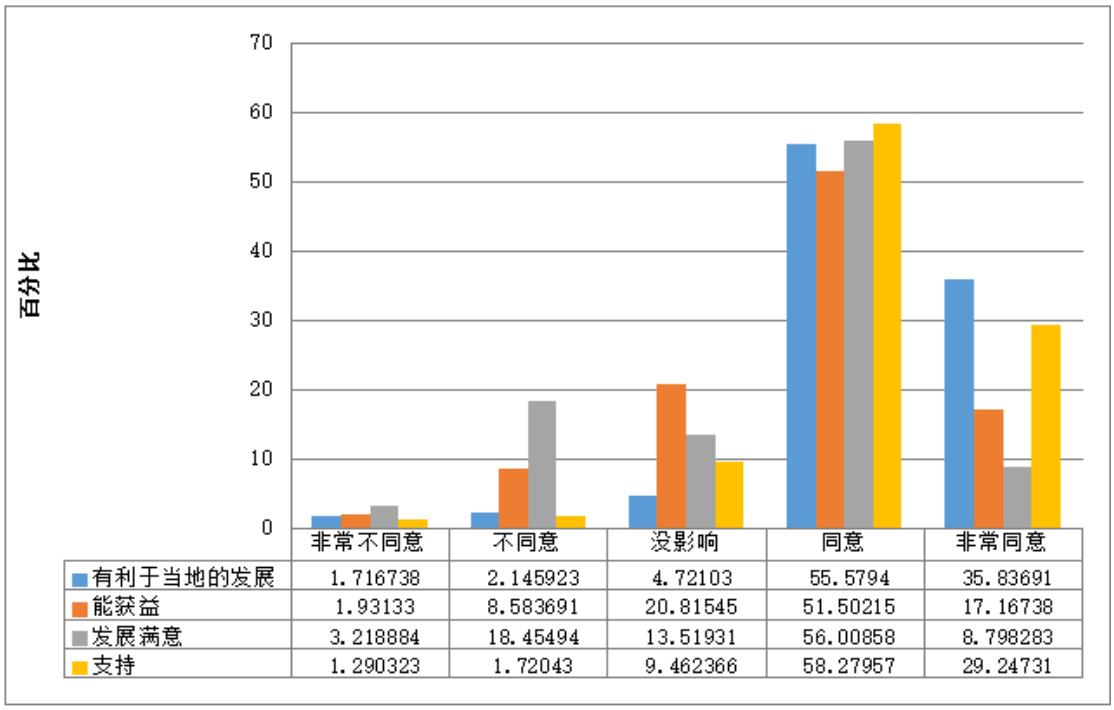
2.3 指标介绍与结果分析

本次监测在阳朔县域范围内依照简单随机抽样的方法，对当地居民进行了问卷调查，共回收有效问卷 468 份，样本数量与往年的情况基本相似。在受调查群体中男女性别比为 1:1.22，年龄主要集中在 15--44，占总数的 77.44%，其中，15-24 岁的年轻群体占 34.59%，25-44 岁的居民占总数的 42.86%，45-60 岁的居民占总数的 17.29%。另外，由于受访者教育程度等原因，调研对象比例略微失衡，15 岁以下群体和 60 岁以上群体仅占总受访数的 5.26%。70.07%受访者为初高中学历（包括中专、大专），82.20%的受访者为常住居民，在阳朔居住时间超过 10 年。

社区监测指标反映了当地居民对旅游发展所带来的社会文化、经济、环境等方面的影响的感知程度，在指标分析中，为更清晰地反映居民对各项影响指标的感知与态度倾向，故将态度量表中的“非常同意”与“同意”的百分比或数值归为一项表示“赞同”，将“非常不同意”与“不同意”的百分比或数值归为一项表示“反对”。

2.3.1 居民对旅游发展的感知评价

受访居民对问卷中居民对问卷中“旅游业有利于我们当地的发展”、“我能从旅游业中获益”、“您对阳朔旅游发展的满意度如何”、“您是否支持继续发展阳朔的旅游业”这四个问题的回答能够反映出居民对阳朔目前总体旅游发展的态度。这四个问题的各选项的选择比例如下图：



	非常不同意	不同意	没影响	同意	非常同意
有利于当地的发展	1.716738	2.145923	4.72103	55.5794	35.83691
能获益	1.93133	8.583691	20.81545	51.50215	17.16738
发展满意	3.218884	18.45494	13.51931	56.00858	8.798283
支持	1.290323	1.72043	9.462366	58.27957	29.24731

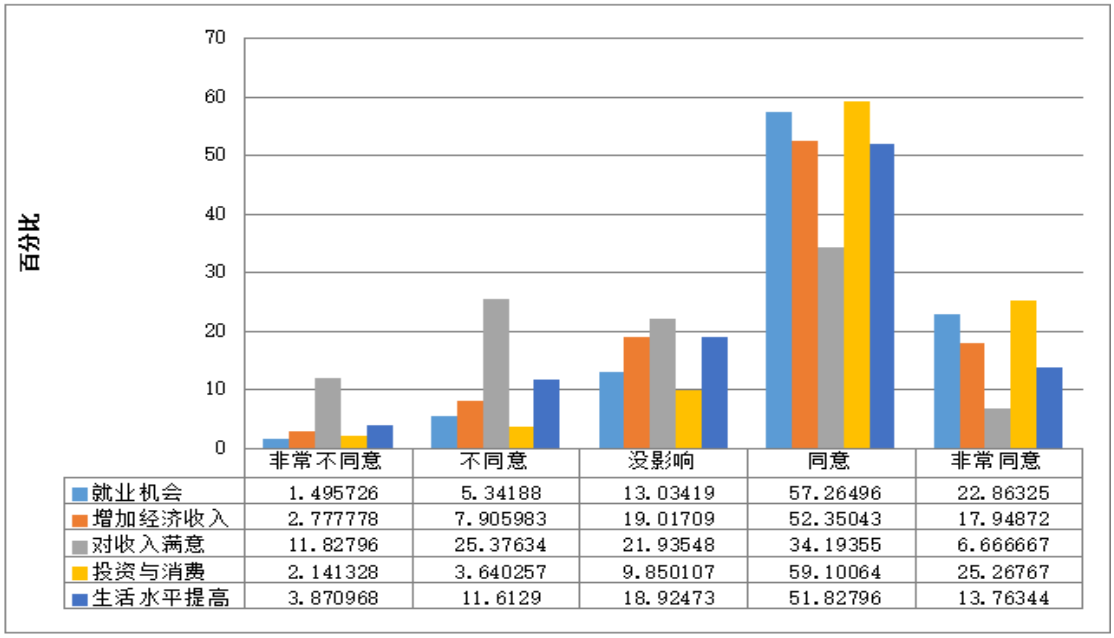
图 2-1 阳朔居民对旅游发展的总体感知

图 2-1 反映了阳朔居民对旅游发展的总体感知，结果显示，91.42%的居民认为旅游业的发展有利于当地的发展，68.67%的居民认为自己能够从旅游业中获益，有 64.81%的居民对阳朔的旅游发展感到满意，87.53%的居民表示将继续支持阳朔发展旅游业。对“旅游业有利于当地发展”、“我能从旅游业中收益”和“将继续支持阳朔旅游业发展”持反对意见的居民比例较少，分别为3.86%、10.52%、3.01%，而对“我满意阳朔的旅游发展的居民”持反对意见的居民相对较多，占 21.67%。

从图 2-1 中可以看出数据大都集中在“同意”和“非常同意”这两选项上，表明大多数的居民都认为旅游业有利于当地的发展，并认为自己能够从中获利。同时，居民对当地旅游发展的满意度和支持度较高。但值得注意的是，超过五分之一的居民对阳朔的旅游业发展并不满意，相较 2013 年同期不满意度上升了 2.87%。

2.3.2 居民对旅游经济影响的感知评价

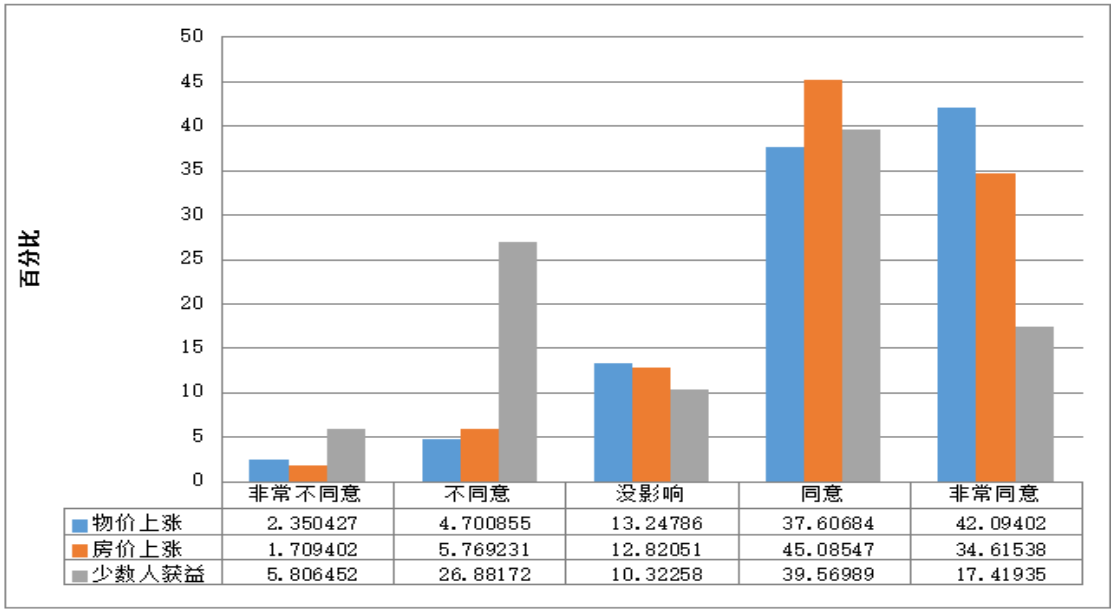
居民对旅游经济影响的评价指标主要体现在问卷中“旅游发展带来更多的就业机会”、“旅游发展使经济收入增加”、“我对自己的收入状况感到满意”、“旅游业吸引了更多的投资与消费”、“导致物价上涨”、“导致房价提升”、“旅游只使少数人受益”、“旅游使生活水平有了很大提高”这八个方面。将这八个问题分为旅游对经济的正面影响和负面影响分别进行分析，结果如图 2-2 和图 2-3 所示。



	非常不同意	不同意	没影响	同意	非常同意
就业机会	1.495726	5.34188	13.03419	57.26496	22.86325
增加经济收入	2.777778	7.905983	19.01709	52.35043	17.94872
对收入满意	11.82796	25.37634	21.93548	34.19355	6.666667
投资与消费	2.141328	3.640257	9.850107	59.10064	25.26767
生活水平提高	3.870968	11.6129	18.92473	51.82796	13.76344

图 2-2 居民对旅游经济影响正面评价

从图 2-2 可以看出阳朔居民对旅游经济影响的正面评价较高。绝大数居民都肯定了旅游在创造就业、引进投资、改善生活等方面发挥的积极影响。其中，对“旅游业吸引力更多的投资与消费”和“旅游发展带来了更多的就业机会”持赞同意见的比例最高，分别为 84.37%、80.13%，另外，有 70.3%的居民认为旅游发展使自己的经济收入增加，65.59%的居民赞同旅游使生活水平有了很大提高。但对自己收入感到满意的人仅有 40.86%，相对较低，有 37.2%的居民对自己的收入状况不满意。



	非常不同意	不同意	没影响	同意	非常同意
物价上涨	2.350427	4.700855	13.24786	37.60684	42.09402
房价上涨	1.709402	5.769231	12.82051	45.08547	34.61538
少数人获益	5.806452	26.88172	10.32258	39.56989	17.41935

图 2-3 居民对旅游经济影响负面评价

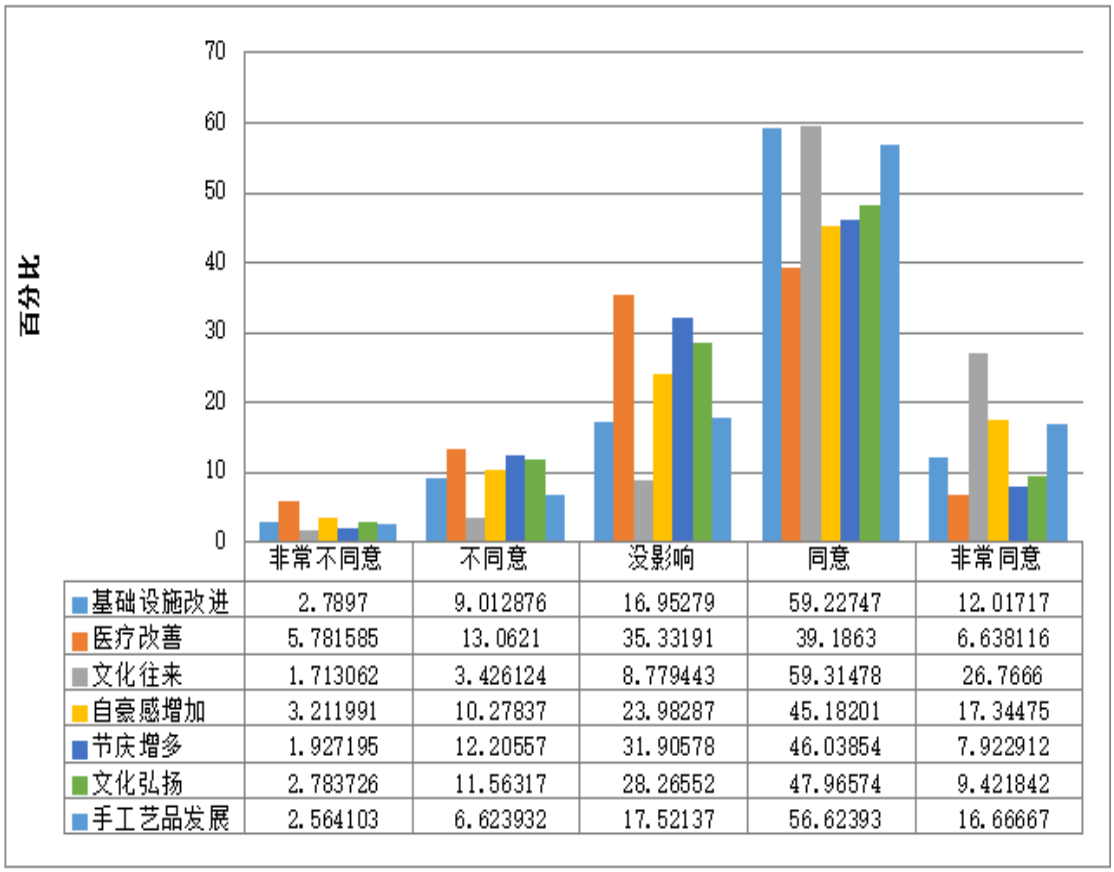
图 2-3 反映了阳朔居民对旅游经济影响的负面评价。有 79.7%的居民认为旅游导致物价上涨，79.7%的居民认为旅游导致房价上涨，还有 56.99%的居民认为发展旅游只使少部分人受益。在旅游导致物价、房价上涨的看法上受访者意见较一致和集中，而对于“旅游只使少部分人受益”这一说法，大家意见不一，分歧较大，有 32.69%的居民表示反对，10.32%持中立态度，56.99%的居民赞同。

总体来讲，阳朔居民对旅游经济影响的感知较客观、真实，同时具有两面性。在图 2-2 和图 2-3 中，数据主要集中在“同意”和“非常同意”这两个选项上，这反映了当地居民对旅游发展给经济带来的正面和负面的影响都有很明显的感知，这说明在当地居民的眼中，旅游对于经济发展是一把“双刃剑”，他们既肯定了旅游对经济发展的带动作用，又为旅游带来的物价上涨、房价攀升表示担忧。

2.3.3 居民对旅游文化影响的感知评价

居民对旅游社会文化影响的感知评价体现在问卷中的“旅游导致犯罪率上升”、“旅游者打乱了我们原本的生活”、“旅游限制了我使用旅游景区资源”、“旅游使基础设施得到很大的改进”、“旅游使医疗设施和服务得到很大的改善”、“旅游使老房子拆迁、新房子数量增多了”、“旅游促进了本地与外地的文化交流”、“旅游使当地的自豪感与归属感增加”、“民俗与传统文化被破坏和淡忘了”、“旅游导致居民与游客的关系紧张”、“旅游损坏了本地的道德风气”、“文化活动或传统节庆增多”、“更多人参与到传统文化弘扬中”、“旅游促进了本地手工艺品发展”这 13 个指标中。将以上 13 个指标分为居民对旅游社会文化影响的正面评价和居民对旅游社会文化影响的负面评价，具体结果如图 2-4 和图 2-5 所示。

2.3.3.1 居民对旅游社会文化影响的正面评价高



	非常不同意	不同意	没影响	同意	非常同意
基础设施改进	2.7897	9.012876	16.95279	59.22747	12.01717
医疗改善	5.781585	13.0621	35.33191	39.1863	6.638116
文化往来	1.713062	3.426124	8.779443	59.31478	26.7666
自豪感增加	3.211991	10.27837	23.98287	45.18201	17.34475
节庆增多	1.927195	12.20557	31.90578	46.03854	7.922912
文化弘扬	2.783726	11.56317	28.26552	47.96574	9.421842
手工艺品发展	2.564103	6.623932	17.52137	56.62393	16.66667

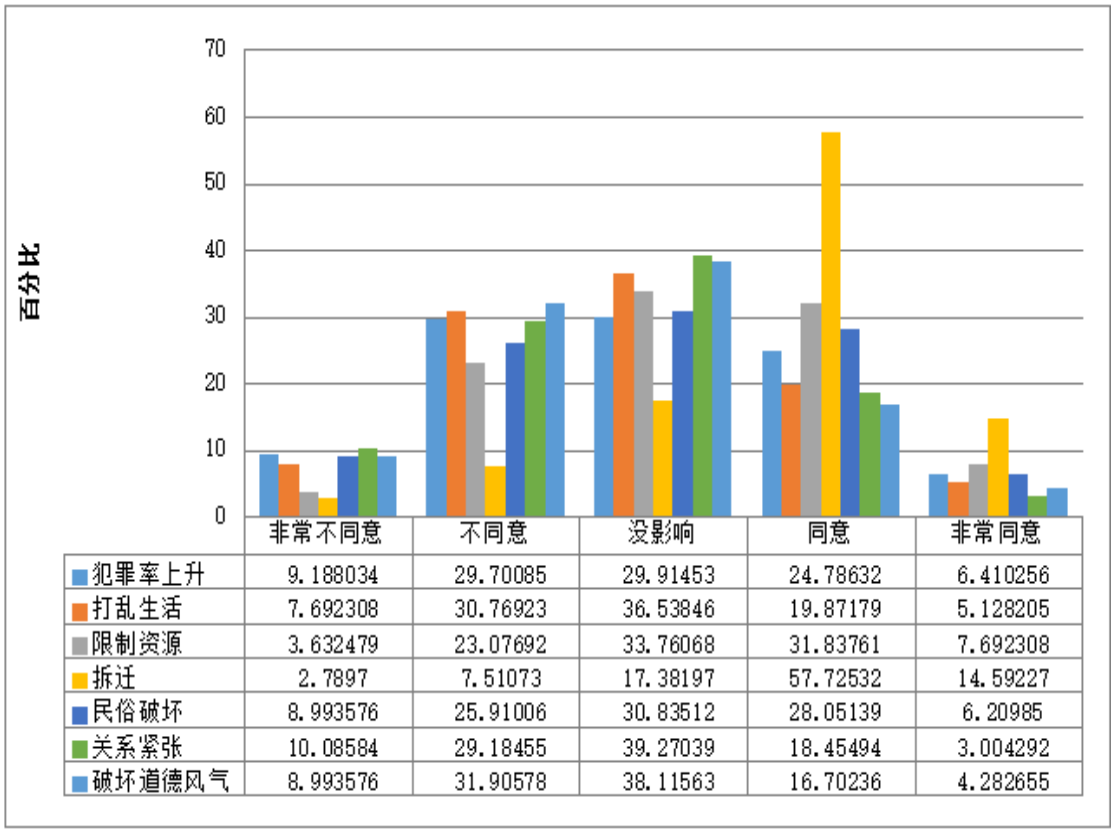
图 2-4 居民对旅游社会文化影响的正面评价

图 2-4 中的 7 个指标体现了阳朔居民对旅游社会文化影响的正面评价，选择“同意”和“非常同意”的居民比例较高，大多数的居民都认为旅游发展使基础设施得到很大的改进，促进了本地文化与外地文化的交流和旅游，也促进了本地手工艺品发展。另外，从总体上来看，六个指标（除“医疗改善”）的“赞同”的比例均超过 50%；在“医疗改善”一项中，居民的“赞同”比例仅为 45.82%，这可能是由于医疗体系的建立与旅游业发展关系并不十分密切。

从图 2-4 中可以看出，有 86.08%的居民表示旅游促进了本地与外地的文化交流，73.29%的居民认为旅游促进了本地手工艺品的发展，71.24%的居民认为旅游发展为基础设施带来了较大的改善；62.53%的居民认为随着阳朔旅游知名度的提高，居民作为阳朔人的身份感和自豪感增强了。57.39%的居民认为阳朔旅游业的发展有利于阳朔文化的弘扬与传播；53.96%的居民赞成旅游业的发展使得节庆活动变得丰富。

对这七个指标表示“反对”的比例均略高于 10%，比例较低，除了“旅游使医疗设施和服务得到很大的改善”这一项，对此表示“反对”的比例有 18.84%，有 35.33%的居民持中立意见，这也间接佐证旅游业的发展并没有给阳朔当地的医疗体系带来大的调整。

2.3.3.2 旅游社会文化负面影响的感知不明显



	非常不同意	不同意	没影响	同意	非常同意
犯罪率上升	9.188034	29.70085	29.91453	24.78632	6.410256
打乱生活	7.692308	30.76923	36.53846	19.87179	5.128205
限制资源	3.632479	23.07692	33.76068	31.83761	7.692308
拆迁	2.7897	7.51073	17.38197	57.72532	14.59227
民俗破坏	8.993576	25.91006	30.83512	28.05139	6.20985
关系紧张	10.08584	29.18455	39.27039	18.45494	3.004292
破坏道德风气	8.993576	31.90578	38.11563	16.70236	4.282655

图 2-5 居民对旅游社会文化影响的负面评价

图 2-5 中的七个指标体现了阳朔居民对旅游社会文化影响的负面评价，从图中可以看出，除了“旅游使老房子拆迁、新房子数量增多了”这一项外，数据主要集中在“不同意”和“没影响”这两项上，这表明居民对旅游社会文化负面影响的感知不明显。

从统计数据来看，“旅游造成居民关系紧张”和“破坏道德风气”两项赞成比例较低，分别为 20.99%和 21.46%。在调查中，仅有 25%的居民认为游客的旅游活动打乱他们的生活。在社会安全方面，有 31.2%的居民认为，旅游发展带来的人流量增多会导致地方犯罪率的增高，但也有 38.89%的居民反对这一看法。另外，有 39.53%的居民认为游客数量的增长会占用他们的资源，导致自己无法很好地使用资源。在社会文化方面，34.26%的居民认为旅游业的发展会导致当地民俗的破坏。

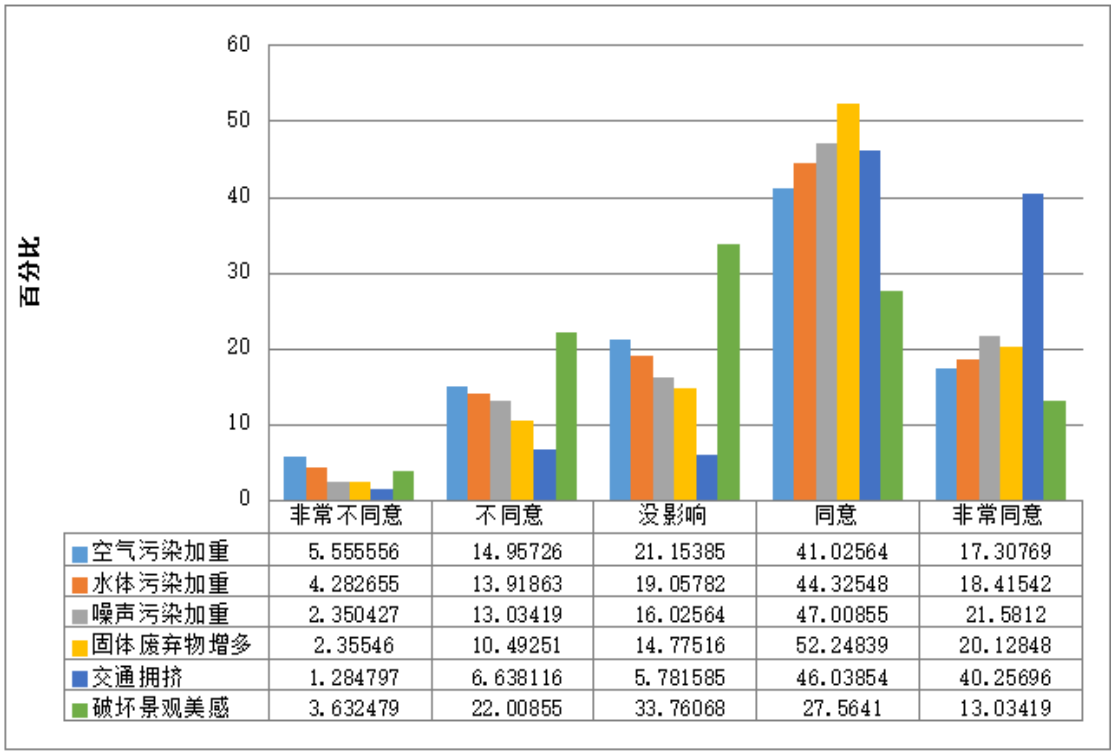
总体来看，居民对旅游发展带来的社会文化方面的负面影响的感知度较低，唯一例外的是，同意旅游导致老房子拆迁、新房子建设增多的居民比例较高，为 72.32%；反对的比例仅为 10.3%。

关于“道德风气”，从访谈结果来看，很多居民认为随着旅游的发展，原先淳朴好客的居民在投入到旅游商业中后，在与游客频繁的商业性质接触后变得势利和虚伪。同时，由于旅游带来的经济收入的增多，居民开始大量地建设房屋，拆除老房屋，也导致了阳朔的“味道”越来越淡。

2.3.4 居民对旅游环境影响的感知评价

2.3.4.1 旅游活动增加，环境遭到破坏

问卷中的“使空气污染加重”、“使水体污染加重”、“使噪音污染加重”、“使固体废弃物污染加重”、“宾馆及其他旅游设施破坏了景观美感”这五个指标体现了居民对旅游环境影响的负面评价。对这五个指标的分析如下图：



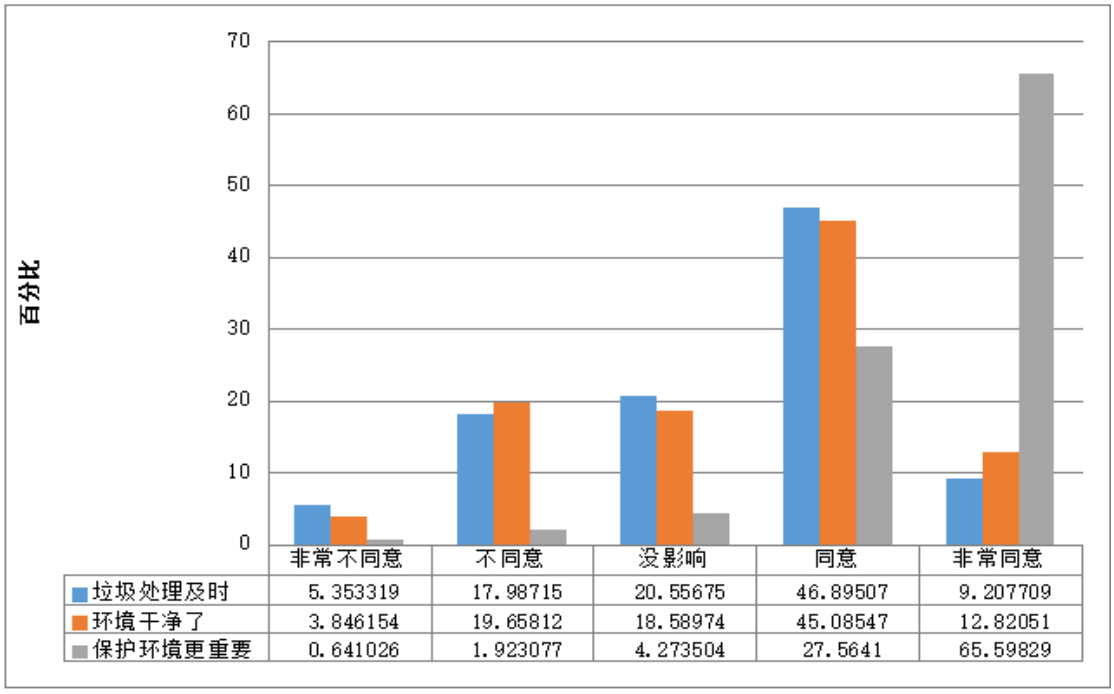
	非常不同意	不同意	没影响	同意	非常同意
空气污染加重	5.555556	14.95726	21.15385	41.02564	17.30769
水体污染加重	4.282655	13.91863	19.05782	44.32548	18.41542
噪声污染加重	2.350427	13.03419	16.02564	47.00855	21.5812
固体废弃物增多	2.35546	10.49251	14.77516	52.24839	20.12848
交通拥挤	1.284797	6.638116	5.781585	46.03854	40.25696
破坏景观美感	3.632479	22.00855	33.76068	27.5641	13.03419

图 2-6 居民对旅游环境影响的负面评价

从图 2-6 中可以看出，绝大多数的居民都认为旅游发展给当地的环境带来了更严重的空气、水体、噪音和废气物污染。其中，对噪声和固体废弃物污染的感知最为强烈，有 72.38%的居民认为旅游发展导致固体废弃物增多。另外，有 68.59%的居民认为噪音污染变得严重，有 62.74%的居民觉得水体污染加重，而认为空气污染加重的居民占 58.33%。总体上来看，居民对旅游环境影响的负面感知较为突出。

对于“宾馆及其他旅游设施破坏了景观美感”表示赞同的居民仅占 40.6%，相比去年同期上升了11.2%；然而，有 33.76%的居民觉得没影响，而 25.67%的居民反对这一说法，是意见分歧较大的一项指标。

2.3.4.2 阳朔环境得到改善，居民环保意识增强



	非常不同意	不同意	没影响	同意	非常同意
垃圾处理及时	5.353319	17.98715	20.55675	46.89507	9.207709
环境干净了	3.846154	19.65812	18.58974	45.08547	12.82051
保护环境更重要	0.641026	1.923077	4.273504	27.5641	65.59829

图 2-7 居民对旅游环境影响的正面评价

从图 2-7 可以看出，有 56.1%的居民认为当地的垃圾处理的及时有效，57.91%的居民表示与发展旅游之前相比，环境更干净了，表明虽然旅游发展导致阳朔的空气质量下降，水体、固体废弃物污染更严重，但是另一方面，当地环境保护方面的措施也得到了加强。另外，有 93.16%的居民认为保护自然环境很重要，说明绝大多数的居民都有较高的环保意识。

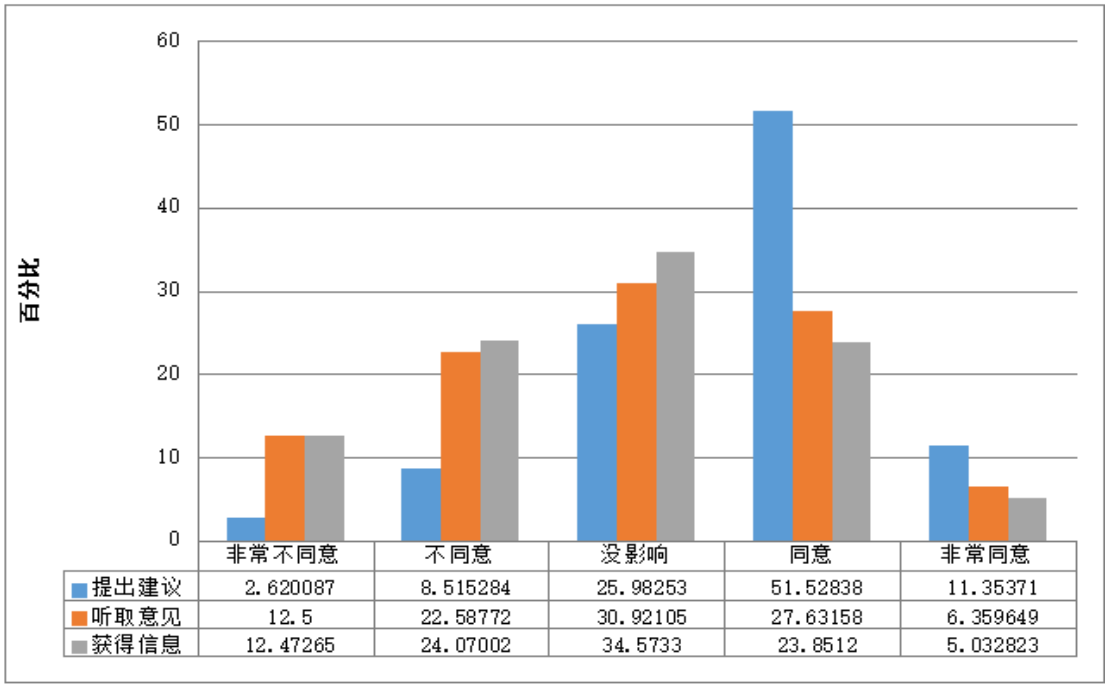
2.3.5 居民社区参与程度

社区居民从事旅游业相关工作的情况可以反映居民社区参与的程度；居民是否愿意主动为景区的发展提出建议可以反映居民社区参与的意愿；景区决策是否听取居民意见以及居民能否获得政府实施的政策方针相关信息，反映了居民社区参与的可进入性。居民对旅游发展的关注与建议，则反映了居民社区参与的主人翁意识。

2.3.5.1 居民参与程度较高，但参与层次较低

根据受访者从业的工作分为“与旅游有关”、“与旅游无关”和“无业”这三类，其中，“与旅游有关的相关”的居民占 49.2%，职业集中在餐饮服务员、竹筏工作人员、导游、酒店行业工作人员和个体户（主要面向游客）等；43%的职业与旅游无关；无业人员占总数约 8%。从受访者说从事工作分布上看，居民参与旅游业的程度不高，工作技术含量不高，仍有较大的提升空间。另外，根据问卷数据可知，76.65%的居民属于全职工作，而 25.35%的居民属于兼职工作，其工作并不稳定。

2.3.5.2 居民旅游参与意识强，但参与渠道受限



	非常不同意	不同意	没影响	同意	非常同意
提出建议	2.620087	8.515284	25.98253	51.52838	11.35371
听取意见	12.5	22.58772	30.92105	27.63158	6.359649
获得信息	12.47265	24.07002	34.5733	23.8512	5.032823

图 2-8 居民对旅游决策参与情况

在阳朔县居民在旅游决策参与方面的参与程度，主要涉及到“我愿意主动为景区发展提出建议”、“景区做一些决策时会听取我们的意见”、“我获得了政府实施的政策方针相关信息”这三个方面。

从图中的数据可知，62.88%的居民表示愿意主动为景区发展提出建议，有较高的参与热情和意愿，说明当地的居民对于旅游发展的参与意识较强。然而，在“景区做一些决策时会听取我们的意见”和“我获得了政府实施的政策方针相关信息”两项监测指标中，居民反对的比例（分别为 35.09%、36.54%）高于赞成比例（分别为 33.99%、28.88%），这说明居民对政府政策方针信息的获取存在着较大的障碍，其意见和建议较难得到表达。

由此，在社区参与程度方面可得出如下结论：居民并未能深入参与旅游行业，但是居民对景区的发展有较高的参与意愿，参与意识较高。与之参与意愿高涨矛盾的是，居民参与决策的建议权和决策权不足，居民对政策方针信息的获取仍存在较大的障碍。

2.4 典型社区案例分析

2.4.1 旧县

旧县位于遇龙河畔白沙镇，有唐代的城墙、明清和文革时期的古建筑，体现了中国不同朝代的建筑艺术。有老根饭庄、老房子花园酒店、秘密花园等具有特色的饭店和客栈，其中有一些是从西街退出的商家。

此次调研在旧县共派发问卷 80 份，其中男性占 51.3%，女性占 42.5%，6.3%的居民拒答。

2.4.1.1 经济影响

居民对旅游促进当地整体经济的认可度高，相对于整体，他们对个人经济能力的提高认可度较低。高达 96. 1%的当地居民认为旅游有利于当地发展，但只有 80.2%的居民认为自己能从旅游业中获益。居民对旅游积极作用的感知是普遍的，即使没有从中获益的居民也会认可旅游发展的积极作用。超过 80%的居民同意旅游带来了就业机会，吸引了更多的投资和消费，与旅游前相比自己的经济收入也增加了，旧县居民的月收入范围在 1000 元以下的占 38.8%，其次是 1001-2000 元，有 27.5%，也就是说，超过 6 成的当地居民月收入在 2000 以下，居民的收入普遍偏低，但他们对自己的月收入感到满意的占 59.9%。收入上涨的同时，物价与房价也在上涨。大部分的村民认为生活水平提高了，而值得关注的是，仍有 17.1%的村民不同意或非常不同意生活水平提高了。

与其他社区相比，旧县居民更易满足，并且从旅游中受益的程度更高。同意自己能从旅游业中获益的比阳朔整体水平高近 12%，旧县居民从旅游中获益的比平均水平更高，虽然很多居民依旧以务农为主要职业。对自己的月收入感到满意的占 59.9%，比阳朔整体水平高了近 20%，虽然他们的月收入相对来说比较低。由此可见，旧县的居民是比较容易感到满足，整体来说还是比较淳朴的。

2.4.1.2 社会文化影响

旧县的社会基础设施改进较大，居民的地方认同感较强烈，但文化的弘扬、交流上相对较弱。在社会基础设施方面，8 成居民同意基础设施得到改进，而在医疗方面，只有 5 成居民认为有所改善，其余居民表示中立或者是不同意，但都高于了平均水平。在文化方面，接近 8%的居民不同意旅游促

进了文化交流，旅游促进文化交往的作用明显，但是阳朔居民不同意的平均水平是 4.1%，旧县这方面依然低于平均水平，这可能跟阳朔旅游发展的进程有关。近年来才有一些外地人、外国人逐渐从西街等地转向旧县这样的乡村，文化交流才逐渐加多。关于民俗和节庆、文化弘扬和手工艺品的发展发面，存在较多的分歧，不同意、表示中立和同意的居民比例差别不大，而总体上阳朔居民对文化得到弘扬、手工艺品得到发展及节庆有所增加的认同程度较高，但是由于旧县的旅游业发展较晚，在文化的弘扬这方面做得还不够。76.3%的旧县居民认为新房子增多了，比阳朔平均水平高 4 个百分点。虽然随着社会经济的发展，房屋的更新换代，人们追求更加舒适便利的生活是不可避免的，但是旧县是一个具有古韵的、建筑具有历史与特色的地方，老房子是其旅游新资源之一，需要得到保护并合理利用，旧县在这方面是做得不够的。在自豪感上，旧县居民认为增加了的占 71.1%，比平均水平高近 10 个百分点，旧县居民的地方认同感还是很强烈的。在资源限制和游客与居民的关系上，居民意见比较分散，一半以上居民认为犯罪率没有上升、没有打乱自己的生活，近 6 成居民认为道德风气没有被破坏，均高于平均水平，大概因为旧县发展较晚，并且游客不多，居民相对淳朴，受到外界商业氛围的冲击较小。

2.4.1.3 环境影响

旧县的环境污染相对阳朔其他地区较少。在污染方面，有 40%以上的居民认同空气污染、水体污染和噪声污染加重、废弃物增多，而对这几个方面持中立态度的都在 20%左右，同时有 85.6%的居民表示交通拥挤。虽然比例都比较高，但也低于阳朔平均水平，这与旧县目前的游客较少有关，因为在旅行社的行程中，通常不包括旧县这一旅游目的地。但同时又有 69.7%的居民认为环境比以前干净了，这看起来是有点矛盾的，大概是因为垃圾处理及时有效。对旅游设施破坏景观美感的态度，居民的意见分歧也较大。94.8%的居民认为保护环境是重要的，没有居民认为他非常不重要，可见旧县居民保护环境的意识是非常强烈的，这与旧县主要靠山水、建筑吸引游客，而不是像西街一样的以商业吸引为主相关。

2.4.1.4 参与渠道与积极性

旧县居民参与旅游决策与信息获取的渠道受限，参与旅游决策的意识不强，但是支持旅游的意识强。一半的居民认为无法获得政府相关信息，43.8%居民表示景区不会听取他们的意见，这比平均水平高近 14%，旧县居民的参与渠道以及信息获取是非常受限的，而愿意提出建议的仅 55.1%，低于平均水平。这大概与旧县居民的文化程度总体较低，大部分都在初中及以下有一定关系。虽然参与渠道受限，但没有居民不支持旅游发展，居民对发展旅游是非常赞成的。

2.4.2 兴坪

兴坪素以山水秀丽、景甲天下而著称，是“中国旅游名县”阳朔县的旅游重镇，距县城 25 公里，这里有著名的九马画山、黄布倒影、雾绕青螺等景点，有两个总统游过的神秘、古朴村落——渔村，以及被印制在 1999 年版贰拾元人民币背景图案的山水风光。由于地理位置较偏、接待设施不成熟等原因，目前兴坪的游客量还较少，游客到达这里也通常不会过夜，商业氛围不是特别浓厚，当地的很多村民依旧过着他们原来的生活，一些老人为了不被游客打扰，会挂出拍照给 5 元的牌子，当地居民采摘自己家种的果蔬在老街售卖，价格实惠，但是生意不是很好。兴坪就像八九十年代的西街一样，接近旅游发展初期时的状态。

本次调研在兴坪古镇共派发居民问卷 78 份，其中男性占 39.7%，女性占 55.1%，其余的为拒答。

2.4.2.1 存在的问题

（1）旅游发展不平衡，少数人受益现象明显，居民自豪感不强

在本次调研中，有 61.5%的居民同意或非常同意旅游只是使少数人收益，远高于旧县的 47.5%和平均水平 57%，兴坪的旅游发展还很不平衡。首先，到达兴坪的游客为数不多，大多数游客由于时间限制不会把兴坪作为一个必去的点。其次，兴坪由于接待设施的缺乏，游客基本都不会选择在那过夜，游客的停留时间短，由于这些原因，到达兴坪的游客通常只是去漓江漂流，或者在老街的主街道稍微逛一下就离开了，旅游辐射范围相对较小。加上竹筏是有漓江漂流公司统一管理，居民的参与受限，参与后的收入也受限，所以旅游带来的收益不是普遍显现，少数人收益现象明显。

在兴坪，表示同意或非常同意感到自豪的居民占 56.4%，低于旧县的 71.1%和平均的 62.5%，在访谈的时候发现，一方面由于游客数量的不足，另一方面由于兴坪的很多年轻人都外出打工，家里面更多的是老人和小孩，对其他地方的经济发展水平和环境状况相对了解，对比之下，造成他们的自豪感和地方认同感的降低。

（2）基础设施改进较慢，接待能力和可进入性仍然较差

在本次调研中，同意或非常同意基础设施得到改进的居民占 67.9%，低于旧县的 80.3%和平均的 71.3%。进入兴坪的道路坑坑洼洼，目前正在修建。兴坪老街上多个地方也正在施工，新建酒店等接待设施。通过访谈得知兴坪老街的基础设施建设与以前相比已经大有改善，但是跟其他地方相比依旧跟不上。

（3）环境污染问题严重，但居民保护环境的意识强烈

大部分的居民都认为水体、噪声、废弃物等收到受到了污染，特别是在交通拥挤和废弃物方面。居民反映有游客在游漓江的时候会将饮料品有意或无意扔进江里，正在施工的酒店需要拖拉机运输材料，进一步加强了交通拥挤程度和噪声污染。96.2%的居民认同保护环境的重要性，高于平均水平 92.2%和旧县，环保意识强烈。

（4）居民参与旅游决策意识较强，但参与渠道受限

超过 60%的居民愿意为景区发展提出建议，但是赞同景区会征询他们意见的仅占 25.6%，低于旧县以及平均水平 34%，景区发展比较忽略当地居民的意见，民普遍不知道去哪里反馈意见。

2.4.2.2 积极的方面

（1）房屋保护相对较好

居民对房屋拆迁数量的感知相对较低，仅 66.7%，低于旧县的 76.3%和平均的 72.3%，可见兴坪相对于其他地方在老房子的保护上相对较好，同时，也有可能是周边村庄的居民生活水平不是很高，没有钱来新建房屋。在老街房屋的保护上，根据访谈得知，老街要想动房屋是需要批准的，基本上都不能改建。政府在这方面做得相对较好，毕竟老街目前还是靠它古色古香的氛围和老建筑吸引游客。

（2）居民参与文化弘扬比例较高，手工艺品发展较好

62.8%的居民同意或非常同意更多的人参与到了传统文化的弘扬之中，高于平均的 57.4%。13 年 12 月漓江渔火节在兴坪的举办，很大程度上加深了当地居民对人们参与到传统文化弘扬的感知，节庆的举办对弘扬传统文化起着较为重要的作用。而在手工艺品发展上，80.8%的居民认同或十分认同旅游促进了手工艺品的发展，高于就显得 56.6%和平均的 73.3%，在一些访谈中，居民认为店铺里售卖的手工艺品便是促进当地手工艺品发展的证据，兴坪老街上的商店目前以手工艺品、咖啡店居多。

2.5 本章小结

整体看来，阳朔居民对发展旅游持支持态度，且绝大部分居民都从中获益，并且肯定了旅游发展对当地经济的促进作用。不过，虽然居民支持旅游，但是居民的满意度在下降，越来越多人感知到利益分配不平等。对于旅游发展所带来的正面影响，特别是经济方面，如增加就业机会、带来了投资和消费、提高了生活水平等方面，大部分居民都是认同的，但同时感知到了在经济方面的负面影响如物价、房价的上涨。此外，他们也感知到旅游所带来的负面影响，特别是环境方面的，如空气污染、水

污染，交通拥挤方面的感知尤为强烈，他们的环保意识也因此增强了。在社会文化影响方面，同样有着两面性，为了吸引游客而打造或重新得到重视的节庆等，促进了传统文化的弘扬，手工艺品制作也因为游客的需求和居民谋生的需要得到了发展。同时，旅游业也给当地社会文化带来了负面影响，限制了居民使用旅游资源、导致犯罪率提升、道德风气一定程度上遭到破坏，以及居民与游客关系略显紧张，不过在这几个方面，认同的居民比例不高，问题还不是很严重。在基础设施、医疗设施、房屋拆迁等方面，已有一些居民能够辩证的看待这是不是旅游发展所带来的正面影响或负面影响，他们可以想到如果没有旅游，随着社会的发展，基础设施也会必然建设得更好，房屋也必然是会更新换代的，只是旅游对他们有了一个促进的作用。与往年一样，居民参与旅游决策、获得旅游信息的渠道并没有很大的改善。政府在调节利益分配机制，改善环境以及建立居民获得信息、反馈信息的平台这些方面需要加强。

第 3 章　游客满意度

3.1 游客对阳朔旅游评价的指标

此次监测中，关于阳朔游客满意度的评估，主要是采取问卷调查的方式进行，并通过一系列衡量游客对旅游资源、产品和服务的感知指标，以及对游客行为特征的分析，从而综合性地评估游客的满意度。

3.1.1 背景与方法

此次监测从 2014 年 7 月 5 日持续至 7 月 13 日，监测员在阳朔县各主要旅游景区对国内外游客进行了随机调查，包括西街、阳朔汽车站、阳朔公园、旧县、十里画廊周边的几大景区以及兴坪古镇等地。共发放问卷 1100 份，其中国内问卷 820 份，有效问卷 714 份，有效率为 87.1%；国外游客 280 份，其中有效问卷 226 份，有效率为 80.7%。

问卷对旅游者不同的行为特征如旅游方式、旅游动机、消费偏好等各方面进行了调查，从而了解阳朔的客源市场的旅游偏好。游客消费偏好中，此次监测新增了关于特色民宿的相关调研指标。而对游客满意度的调查，则主要包括以下 3 个方面：旅游资源评价、旅游服务评价和整体旅游环境评价。这三方面的调查内容，又细分为 32 个二级指标，并通过李克特量表分为非常赞同、赞同、中立、不赞同、非常不赞同的 5 个满意度程度，相应地用 5、4、3、2、1 这五个数值对其量化，通过计算每个指标的均值，以及表示赞同的两个程度（5、4）占总体的百分比，来综合衡量游客对阳朔旅游该项指标的满意度。另外，游客对阳朔旅游经历的整体评价，以及其重游推荐意愿的调查，是作为衡量阳朔旅游的可持续发展的重要指标。本文还参考了阳朔县旅游局的旅游投诉数据，作为衡量满意度的辅助指标。

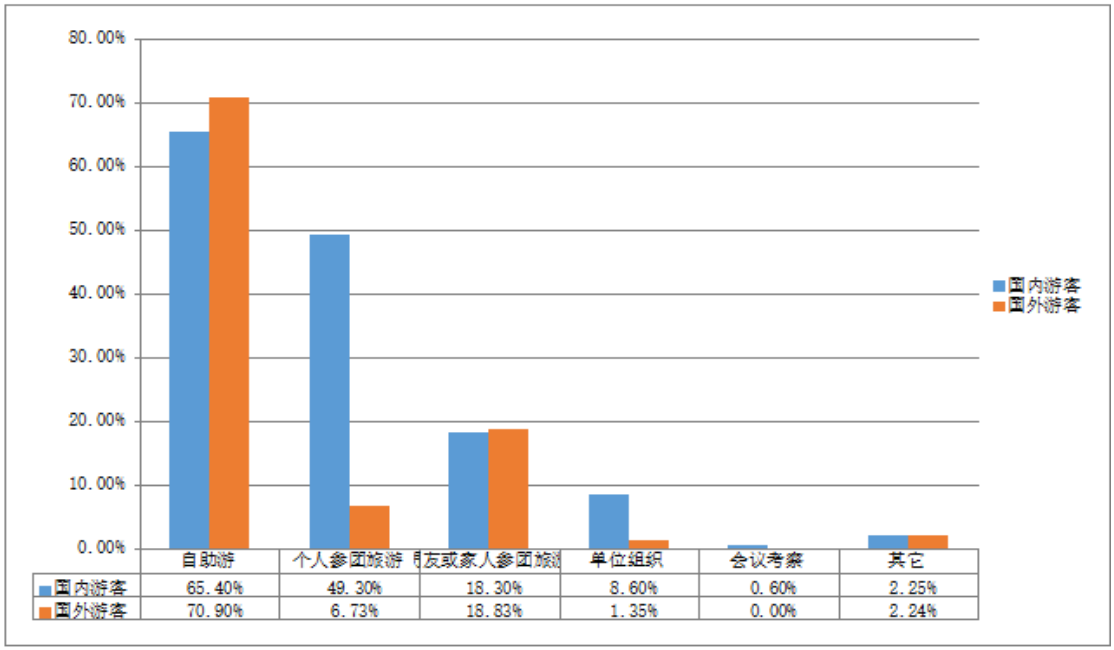
3.1.2 游客满意度监测指标

游客问卷中，设计了三大方面的评价，共 32 项，和一项总体评价。采用了李克特量表进行调查。其中，旅游资源评价部分包括 6 个指标，可分类为资源特色和资源保护程度感知两个维度；旅游服务评价包括 19 个指标，按旅游产品和服务类型的不同，依次分为景区、餐饮、住宿、交通、购物的五大不同服务类型，有利于后期对不同旅游产品和服务的质量进行测量和监测；整体旅游环境评价的 6 个指标，包括对人文与自然环境的不同感知程度；以及一项对阳朔旅游的整体评价。

3.2 游客行为特征

3.2.1 游客的旅游方式：自助游占主导，国内参团游走俏

通过研究调查汇总，得到如图 3-1 的数据图。由该对比图可知，无论是国内游客还是国外游客，自助游的旅行方式在阳朔这一目的地，都是较为热门的。其中，国内自助游的比例超过 60%，而国外的自助游客更是高达 70.9%。其次是个人参团旅游，国内游客今年数据较往年游客有大幅地提升，近半数国内游客选择个人参团旅游；相反的，国外游客较往年数据有所回落，仅有 6.73%。朋友家人参团旅游，国内游客有 18.3%的比例，国外游客则为 18.83%，数据与往年数据相当，基本维持在 20%的水平。而在单位组织的旅游中，国内游客占到了 8.6%，说明阳朔也开始成为了国内公司单位奖励旅游的目的地，而这部分游客较去年的数据有所下降；国外游客的比例与往年接近，维持在 1%至 2%的范围。会议考察方面的游客群体，不管是国内游客（0.6%）还是国外游客(0%)都仍然显得十分薄弱，虽然 2012 年上半年的报告发现阳朔五星级及五星标准的高端酒店已经建起，但由于商务会议设施是需要有较长的准备发展期，同时今年的公费旅游因受到政策限制，会议旅游的比例较少，因此并未有明显的增长。



	自助游	个人参团旅游	友或家人参团旅	单位组织	会议考察	其它
国内游客	65.40%	49.30%	18.30%	8.60%	0.60%	2.25%
国外游客	70.90%	6.73%	18.83%	1.35%	0.00%	2.24%

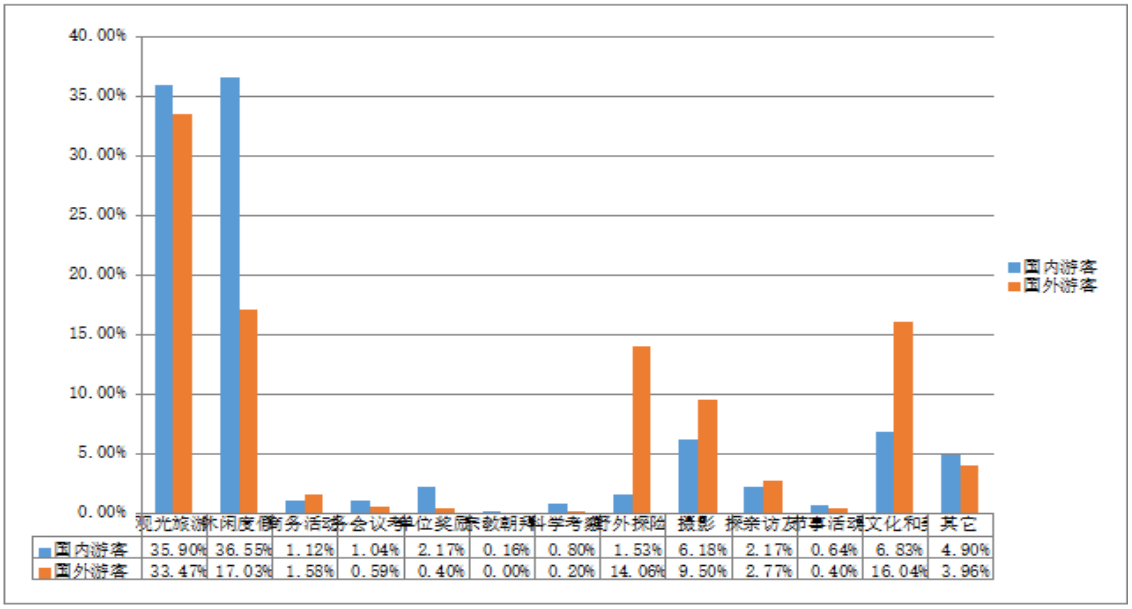
图 3-1 国内外游客旅行方式对比图

3.2.2 旅游动机：观光与度假为主打，探险、文化与美食成新秀

国内游客的旅游动机依旧是以观光旅游（35.9%）和休闲度假（36.55%）为主。了解文化和饮食（6.3%）也比 2013 年的同项数据（21.3%）出现较明显的下滑，除了天气等客观原因，阳朔饮食的同质化现象和价格不一的现象，是下滑的原因之一。与去年的数据相比，野外探险和摄影这两种新型旅游动机，都由原来微弱的增加转为下滑，在摄影方面，仅有 6.18%的游客选择了这一动机，野外探险则有 1.53%，也可以说明尽管目前国内游客已经开始持有较为特殊的旅游动机，但是由于今年的天气原因，游客出行有所顾虑。

国外游客的旅游动机则有些许差异，观光与度假依旧是最主要的两个旅游动机，占据了过半的游客数，分别占 33.47%和 17.03%，说明自然环境依然是最吸引外国游客前往阳朔的因素。同时，与国内游客（1.53%）有最明显不同的是野外探险动机，有 14.06%的国外游客到阳朔的目的是野外探险、攀岩户外活动等，体现了国外游客的传承探险精神。

另外，有 9.5%的国外游客、6.18%的国内游客到阳朔旅游的目的是为了摄影；有 16.04%的国外游客、6.83%的国内游客到阳朔旅游的目的是为了了解文化与美食。可见，阳朔除了利用自然环境来主打传统的观光度假旅游，探险、摄影、文化与美食旅游是下一阶段阳朔旅游发展的新秀。



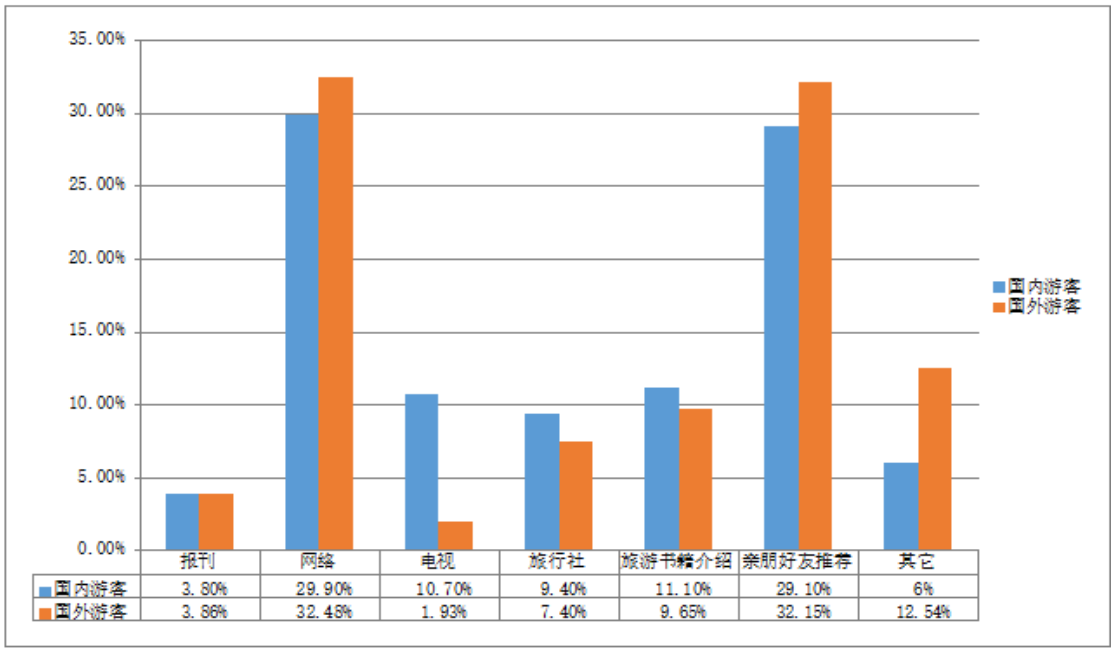
	观光旅游	休闲度假	商务活动	会议考察	单位奖励	宗教朝拜	科学考察	野外探险	摄影	探亲访友	事务活动	文化和美食	其它
国内游客	35.90%	36.55%	1.12%	1.04%	2.17%	0.16%	0.80%	1.53%	6.18%	2.17%	0.64%	6.83%	4.90%
国外游客	33.47%	17.03%	1.58%	0.59%	0.40%	0.00%	0.20%	14.06%	9.50%	2.77%	0.40%	16.04%	3.96%

图 3-2 国内外游客旅游动机对比图

3.2.3 旅游信息：偏向网络平台与亲友推荐，景区介绍备受关注

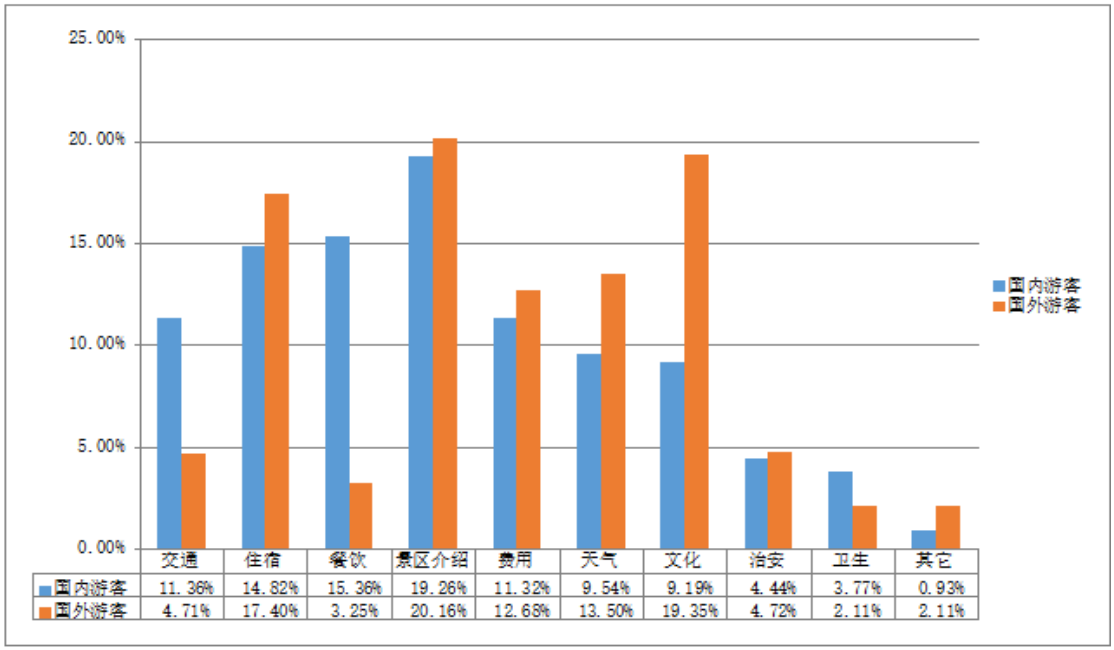
如图 3-3 所示，国内外游客的旅游信息主要来源于网络平台和亲朋好友的推荐。其中，国内游客旅游信息来源中，网络占 29.9%，亲朋好友推荐占 29.1%；国外游客旅游信息来源中，网络占 32.48%，亲朋好友推荐占 32.15%。可见，无论是网络平台还是亲友推荐，阳朔旅游的口碑效应很重要。

由图 3-4 可知，国内外游客最希望获取的阳朔旅游信息是景区介绍，分别占到 19.26%和 20.16%。除此之外，国内游客最希望获取的阳朔旅游信息依次还有餐饮、住宿和交通，分别占 15.36%，14.82%和 11.36%；而国外游客则是文化、住宿和天气，分别占 19.35%，17.4%和 13.5%。



	报刊	网络	电视	旅行社	旅游书籍介绍	亲朋好友推荐	其它
国内游客	3.80%	29.90%	10.70%	9.40%	11.10%	29.10%	6%
国外游客	3.86%	32.48%	1.93%	7.40%	9.65%	32.15%	12.54%

图 3-3 国内外游客获取阳朔旅游信息的渠道对比图

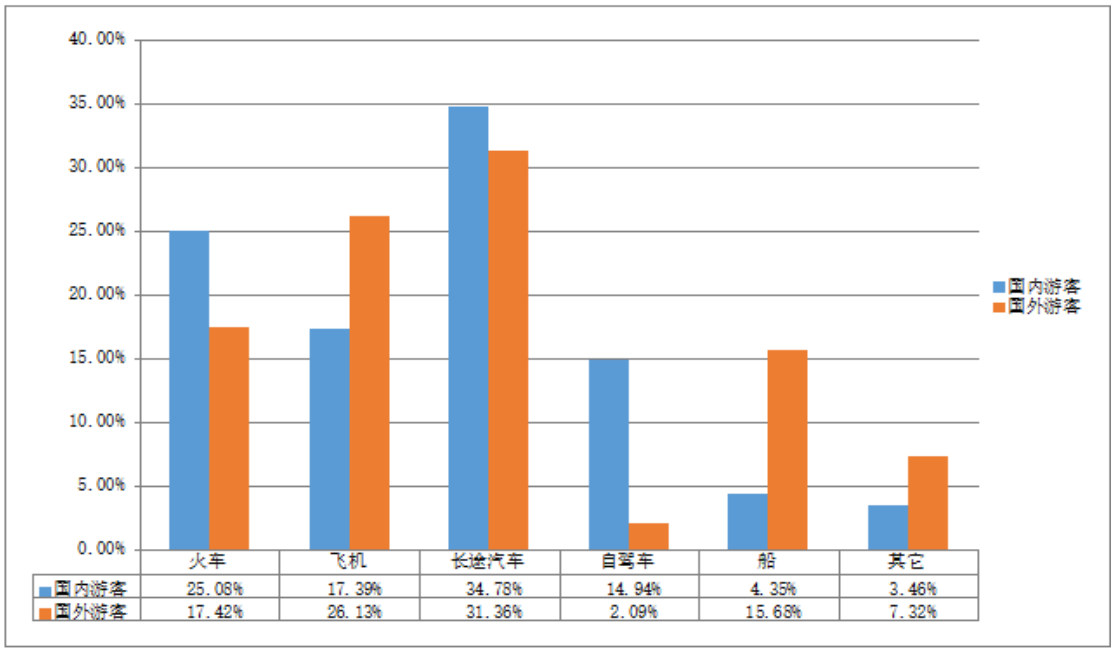


	交通	住宿	餐饮	景区介绍	费用	天气	文化	治安	卫生	其它
国内游客	11.36%	14.82%	15.36%	19.26%	11.32%	9.54%	9.19%	4.44%	3.77%	0.93%
国外游客	4.71%	17.40%	3.25%	20.16%	12.68%	13.50%	19.35%	4.72%	2.11%	2.11%

图 3-4 国内外游客最希望获取的阳朔旅游信息对比图

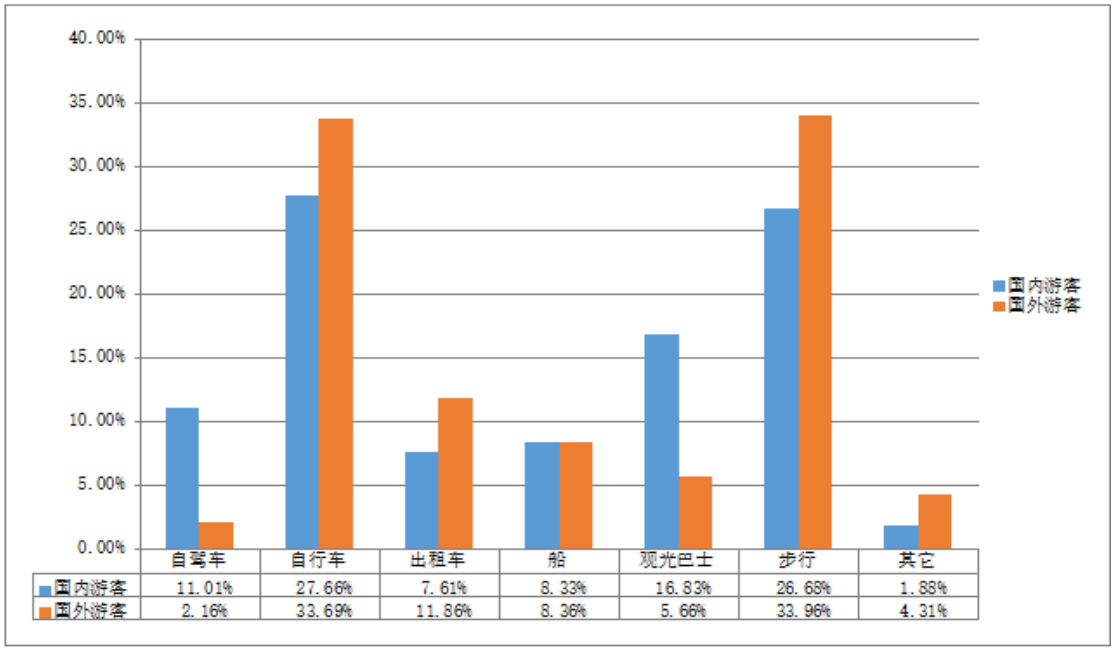
3.2.4 交通方式：选择多样，倾向绿色出行

游客到达阳朔所选择的交通工具，如图 3-5 所示，长途汽车占较大的比例，主要是因为国内外游客大部分是先到达桂林后再来到阳朔。与往年相比，国内游客选择飞机和自驾车旅游的比例上升。而在阳朔县城内，旅游过程中的交通方式选择结果则如图 3-6 所示，像自行车和步行这样的绿色出行方式和往年相似，是国内外游客的偏爱。通过数据对比可以发现国外游客仍比较注重与自然的交流，超过一半的游客都采用自行车和步行的交通方式，而国内游客部分人虽然开始偏爱绿色出行，但是团队游客对于观光巴士的使用，仍然有一定的依赖。



	火车	飞机	长途汽车	自驾车	船	其它
国内游客	25.08%	17.39%	34.78%	14.94%	4.35%	3.46%
国外游客	17.42%	26.13%	31.36%	2.09%	15.68%	7.32%

图 3-5 国内外游客到达阳朔交通工具对比图



	自驾车	自行车	出租车	船	观光巴士	步行	其它
国内游客	11.01%	27.66%	7.61%	8.33%	16.83%	26.68%	1.88%
国外游客	2.16%	33.69%	11.86%	8.36%	5.66%	33.96%	4.31%

图 3-6 国内外游客阳朔内交通方式对比图

3.2.5 住宿设施：偏向家庭旅馆和青年旅社，民宿市场兼顾高端与快捷类型

如图 3-7 所示，国内游客大部分选择家庭旅馆（39.45%），其次是星级酒店（27.31%），而住青年旅舍的游客达到了 23.55%的比例，这反映了青年旅舍目前已经受到国内旅游者的重视和关注。相比国内游客，国外游客选择的住宿设施则与国内游客不同，最多的选择是青年旅舍（34.51%）。监测发现，在阳朔县城内西街及其附近的小巷子中有很多青年旅舍，比较受到外国游客的欢迎。而外国游

客选择居住在星级宾馆（22.12%）与往年数据相当，家庭旅馆（30.09%）的比例则有大幅上升。在其他选项中，亦有很多游客选择客栈。

由此可见，民宿市场在阳朔的发展，基本趋于稳定，且依然有上升的空间。如图 3-8 所示，监测中有高达 94.37%的国内游客支持阳朔发展有特色的民宿。其中，51.64%的国内游客认为民宿价格不重要，重点是要有特色；另外的 42.73%的国内游客认为价格便宜最重要。根据这两种截然不同的评价，阳朔民宿市场发展，可能呈现二元化；一种是贴近高端精品酒店类型的民宿，另一种是类似快捷酒店类型的民宿。

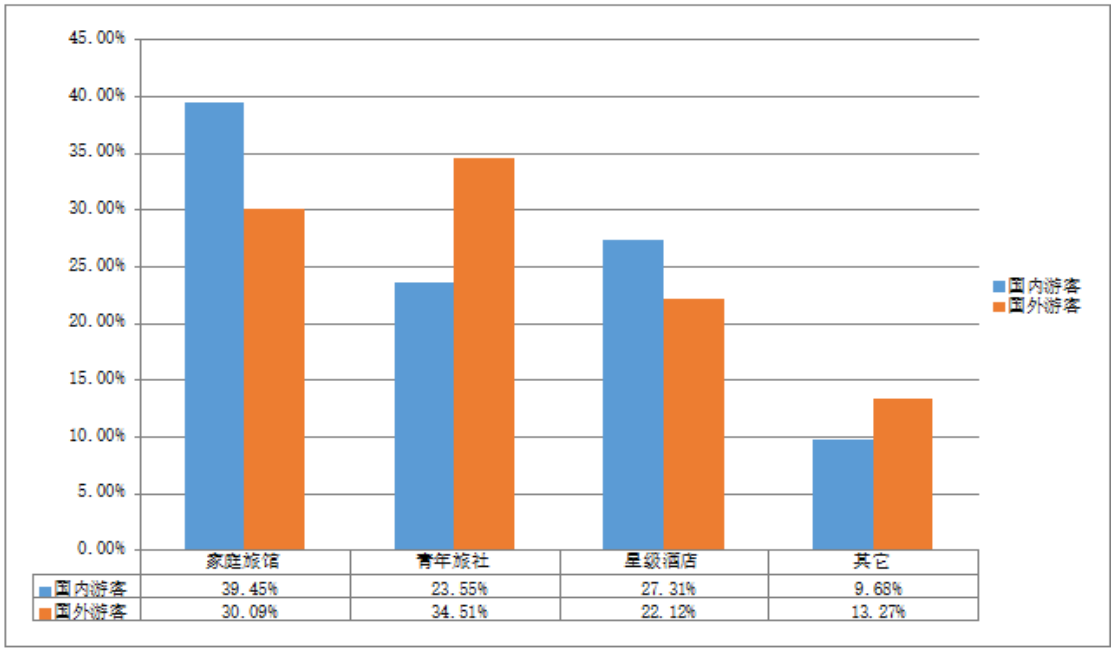


图 3-7 国内外游客住宿设施对比图

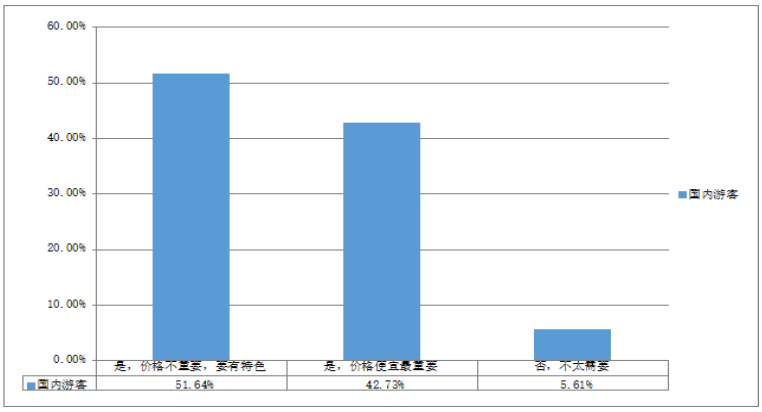


图 3-8 国内游客对阳朔新增特色民宿的评价

3.2.6 停留时间：多为短期旅游，国外游客停留时间较长

国内游客在阳朔的停留时间主要集中在 1-3 天，达到 72.68%的高比例；而国外游客停留 1-3 天的游客也占据了最大比例的 60%，但相对于国内游客而言比例稍低。国外游客更倾向于停留较多的时间，停留 4-7 天的比例为 25.78%，高于国内游客的 20.74%；停留 7 天以上的比例（14.22%），远高于国内游客（6.58%）。总体分布情况，与往年数据相近，没有较大变化。

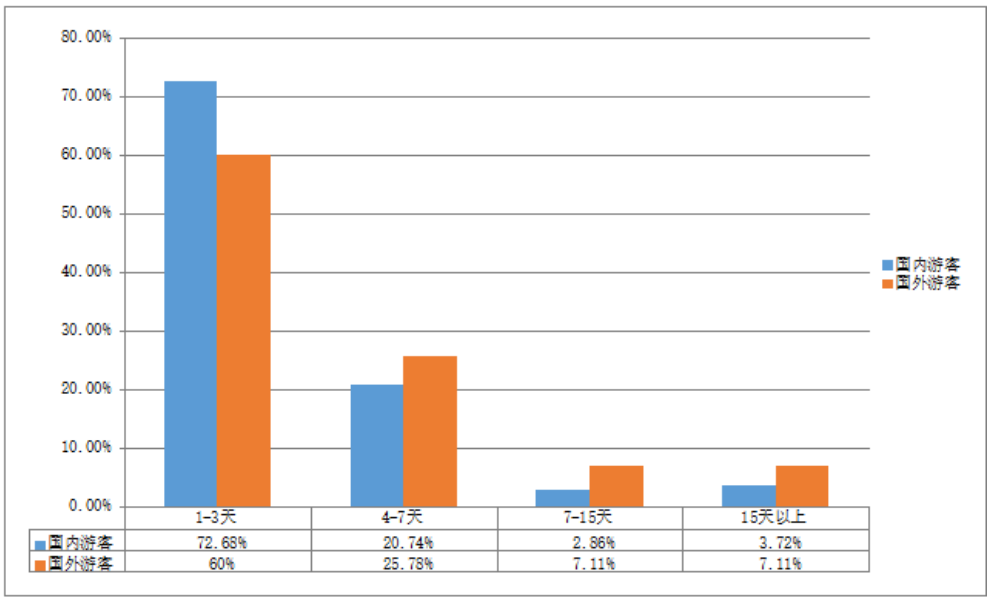


图 3-9 国内外游客停留时间对比图

3.2.7 旅游总花费：国内外游客总花费少，国内游客略有增加

在旅游花费方面，国内外游客的旅游花费（总花费）都不多，多集中在 500 元以下（国内 19%，国外 23.85%）和 500-1000 元（国内 31.06%，国外 33.44%），这主要是由于旅程停留时间较短，且多为观光旅游。与往年数据相比，国内游客的旅游总消费有轻微上升的趋势，其总消费在 1000 元以上的比例超过国外游客；而国外游客的消费水平，与往年相当。

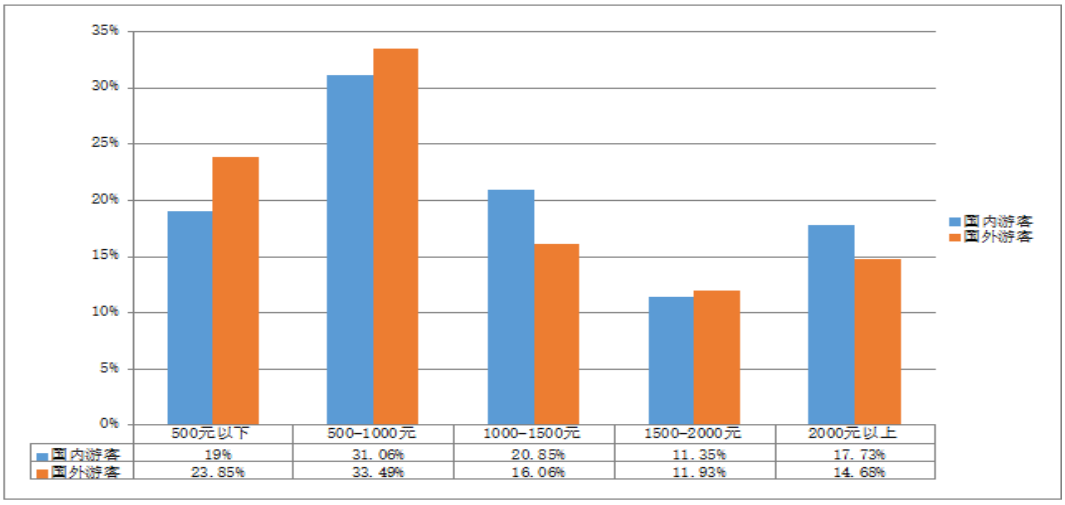


图 3-10 国内外游客旅游总花费对比图

3.3 游客的满意水平

3.3.1 对旅游资源的评价普遍较高

关于游客对阳朔旅游资源的评价，问卷设置分为两方面，分别为资源特色和资源保护。资源特色方面的指标共有五个：自然资源丰富，阳朔山水甲桂林，文化景观具有地方风情，可以很好地体验到当地的饮食文化，可以买到满意的纪念品和工艺品。资源保护方面的指标有三个：漓江水质状况好，遇龙河水质状况好（英文问卷中设置），文化景观维护得当。

表 3-1 国内游客旅游资源评价表

监测方面（内）		具体监测指标	平均值	方差	满意度
旅游资源评价	资源特色	自然资源丰富，景色优美	4.48	0.404	92.58%
		文化景观具有地方风情	4.04	0.73	76.30%
		可以很好地体验到当地的饮食文化	3.69	0.85	60.49%
		阳朔山水甲桂林	4.19	0.701	79.51%

		可以买到满意的纪念品和工艺品	3.65	0.976	56.15%
	资源保护	漓江水质状况好	3.5186	1.091	49.93%
		文化景观维护得当	3.7471	0.838	61.42%

表 3-1 国外游客旅游资源评价表

监测方面（外）		具体监测指标	平均值	方差	满意度
旅游资源评价	资源特色	自然资源丰富,景色优美	4.69	0.258	97.80%
		文化景观具有地方风情	3.84	1.338	77.31%
		可以很好地体验到当地的饮食文化	4.3	4.746	73.46%
		阳朔山水甲桂林	3.58	1.106	55.86%
		可以买到满意的纪念品和工艺品	3.93	0.686	74.21%
	资源保护	漓江水质状况好	2.96	1.208	27.60%
		遇龙河水质状况好	2.89	1.786	36.95%
		文化景观维护得当	3.49	1.051	50.68%

根据 2014 年国内外游客调查问卷，关于阳朔旅游资源丰富、景色优美方面，国内外游客普遍满意度较高，其中国内游客满意度达到 92.58%，国外游客满意度达到 97.80%。关于资源的地方风情，国内外游客均不是非常满意，满意度分别为 76.30%和 77.31%。在购买纪念品方面，国内外游客满意

度均不高，国内游客满意度为 56.15%，国外游客满意度为 74.21%。实地调查以及访谈发现，阳朔的纪念工艺品和厦门、凤凰等旅游地的纪念品相似程度很高，这也是中国目前普遍存在的一个旅游纪念品同质化的现象。但是，在饮食文化方面，国内游客满意度为 60.49%，国外游客满意度为 73.46%。也就是说，国外游客在饮食文化方面比国内游客更满意。阳朔旅游目前的饮食文化较为单一，原本特色的菜式如今在阳朔也已泛滥。中国人对于饮食文化要求高，且当地饮食文化独特性不能明显突出，而国外游客对中国饮食文化要求不同，所以造成了国外游客在饮食文化方面的满意度高于国内游客的结果。

关于资源保护方面，国外游客调查的满意度显示，漓江水质好于遇龙河水质。但是，实地调研发现，遇龙河水质更好。根据访谈得知，选择去漓江的国内游客多是已去过遇龙河的游客。对于漓江水质，国内外游客满意度均很低，国内游客满意度比国外游客高，为 49.93%，国外游客为 27.60%。在文化景观维护方面，国内外游客均不认为文化景观保护得当，满意度分别为 61.42%和 50.68%。总而言之，无论是国内游客还是国外游客对当地旅游资源的保护均是不满意的，旅游资源的保护包括自然资源保护和文化资源保护两方面，均没有得到国内外游客的认可。

3.3.2 对阳朔旅游服务的评价

3.3.2.1 对阳朔景区服务的满意度不高

关于景区服务方面的评价，共有三个指标：景区门票价格合理、景区员工服务质量好和景区导游解说水平高。

表 3-2 国内游客旅游景区服务评价表

监测方面（内）		具体监测指标	平均值	方差	满意度比率
旅游服务评价	景区服务	景区门票价格合理	3.1362	1.2	37.90%
		景区员工服务质量好	3.5106	0.969	52.16%
		景区导游解说水平高	3.427	1.055	47.32%

表 3-3 国外游客旅游景区服务评价表

监测方面（外）		具体监测指标	平均值	方差	满意度比率
旅游服务评价	景区服务	景区门票价格合理	3.37	1.305	50.45%
		景区员工服务质量好	3.5242	1.419	60.65%
		景区导游解说水平高	3.3789	5.82	51.90%

根据国内外游客旅游景区服务评价，关于景区服务方面的评价，国内外游客满意度均不高，但是国外游客满意度比例略高于国内游客。在价格方面，国内游客满意度为 37.90%，国外游客为 50.45%，两者对价格均不满意也和阳朔旅游价格不透明有关。在景区员工服务方面，国外游客满意度高于国内游客满意度。经过实地调查发现，景区员工更愿意服务于外国游客，这主要是因为外国游客对于旅游产品愿意支付的价格更高。景区导游解说水平方面，国内外游客满意度均不高且相当不大，分别为 47.32%和 51.90%。

3.3.2.2 对阳朔餐饮服务的评价较低

关于餐饮服务的评价指标，共有 3 个：餐饮特色、餐饮卫生安全和餐饮价格合理。

表 3-4 国内游客旅游餐饮服务评价表

监测方面(内)		具体监测指标	平均值	方差	满意度比率
旅游服务评价	餐饮服务	餐饮有特色	3.5716	2.188	52.65%
		餐饮卫生安全	3.3418	0.947	43.45%
		餐饮价格合理	3.2043	1.083	38.94%

表 3-5 国外游客旅游餐饮服务评价表

监测方面(外)		具体监测指标	平均值	方差	满意度比率
旅游服务评价	餐饮服务	餐饮有特色	3.5639	1.043	57.27%
		餐饮卫生安全	3.4802	1.215	57.73%
		餐饮价格合理	3.7048	1.156	66.52%

根据国内外游客旅游餐饮服务评价表，国内游客对于餐饮服务的满意度低于 50%，普遍低于国外游客。一方面是因为国外游客购买力普遍价高，对餐饮价格不敏感，另一方面是中餐对于国外游客来说显得更具有特色。但是，国内外游客对于餐饮服务均不表示满意。根据游客访谈得知，阳朔餐饮不论在特色、卫生安全、价格方面，均未做到让游客满意。餐饮同质化、价格不透明等，让游客对于阳朔餐饮产生了反感情绪。

3.3.2.3 对阳朔住宿服务基本满意

关于住宿服务的评价指标，共有 3 个：食宿员工服务质量好、住宿安全卫生和住宿价格合理。

表 3-6 国内游客旅游住宿服务评价表

监测方面(内)		具体监测指标	平均值	方差	满意度比率
旅游服务评价	住宿服务	住宿安全卫生	3.6553	0.914	61.94%
		住宿价格合理	3.6355	0.956	61.01%
		食宿员工服务质量好	3.5887	1.001	59.97%

表 3-7 国外游客旅游住宿服务评价表

监测方面（外）		具体监测指标	平均值	方差	满意度比率
旅游服务评价	住宿服务	住宿安全卫生	3.9604	1.047	77.83%
		住宿价格合理	4.0705	4.818	77.38%
		食宿员工服务质量好	3.9868	0.978	75.78%

根据国内外游客旅游住宿服务评价表，对于住宿服务满意度，国外游客平均值大致为 4，可以看出，国外游客大多对住宿呈现满意态度。而国内游客平均值为 3.6，且国内游客大多呈现中立态度。由此可见，国外游客满意度比例明显高于国内游客。根据访谈发现，这是由于国内游客对于住宿要求比国外游客高；同时，国外游客选择住宿的旅馆标准要普遍好于国内游客。

3.3.2.4 对阳朔交通服务的评价不一，满意度低

关于阳朔的旅游交通的评价，共有 3 个指标：交通便利、交通标识系统清晰和交通价格合理。

表 3-8 国内游客旅游交通服务评价表

监测方面(内)		具体监测指标	平均值	方差	满意度比率
旅游服务评价	交通服务	交通便利	3.3078	1.108	45.53%
		交通标示系统清晰	3.4028	1.056	47.34%
		交通价格合理	3.5333	0.974	54.09%

表 3-9 国外游客旅游交通服务评价表

监测方面(外)	具体监测指标	平	方	满意

			均值	差	度比率
旅游服务评价	交通服务	交通便利	2.9692	1.411	37.22%
		交通标示系统清晰	2.8767	1.374	31.36%
		交通价格合理	3.0837	1.794	47.12%

根据游客旅游交通服务评价表，国外游客对于旅游交通的满意度评价均值为约为 3.4，国外游客则较低，约为 2.9。从方差上看，国内外游客关于交通服务的评价的差异均比较大，主要因为采用不同的交通方式和旅行方式都会影响到交通是否便利。通过访谈，阳朔县内公共交通并不方便，许多地方需要骑自行车或者乘坐大巴才能去，这样，旅游团的游客依靠旅游大巴可能会方便些，但是自助游的游客就会很不方便。而国外游客对交通的满意度存在波动主要因为沟通问题。在阳朔车站观察发现，国外游客对于国内等车的班次并不是很清楚，一些时候他们需要询问一些人，并且非常担心等不到车，如果一些游客有中文导游，这种情况会减少，这就造成了交通服务满意度的波动较大。

3.3.2.5 对阳朔娱乐购物服务的评价不高

关于游客旅游娱乐购物服务的评价指标，共有五项：周边小商铺员工服务质量好、旅游商品类型相同程度高、旅游商品存在假冒伪劣商品、旅游商品价格合理和娱乐活动丰富。

表 3-10 国内游客旅游购物服务评价表

监测方面（内）		具体监测指标	平均值	方差	满意度比率
旅游服务评价	娱乐购物服务	娱乐活动丰富	3.804	0.764	66.95%
		周边小商铺员工服务质量好	3.4424	0.905	47.12%
		旅游商品类型相同程度高	3.835	3.403	65.80%
		旅游商品存在假冒伪劣	3.351	2.1	37.37

		产品	4	91	%
		旅游商品价格合理	3.186	3.226	33.82%

表 3-11 国外游客旅游购物服务评价表

监测方面（外）		具体监测指标	平均值	方差	满意度比率
旅游服务评价	娱乐购物服务	娱乐活动丰富	3.7048	1.749	74.76%
		周边小商铺员工服务质量好	3.5242	8.436	56.19%
		旅游商品类型相同程度高	3.7841	12.028	58.69%
		旅游商品存在假冒伪劣产品	3.5463	5.435	54.50%
		旅游商品价格合理	3.2643	1.337	47.71%

根据游客旅游购物服务评价表，关于娱乐购物服务项目，国内外游客多数认为娱乐活动丰富，满意度分别为 66.95%和 74.76%，根据访谈发现，国外游客对于酒吧十分钟爱，而阳朔的各类酒吧满足了他们这方面的需求。同时阳朔西街的商业气息浓厚，也引得众多国内游客驻足，在夜间找到了娱乐的地方。关于周边小商铺员工的服务质量，满意度分别为 47.12%和 56.19%，根据观察发现，国外游客在购买商品时态度比较友善，消费能力比较高，店员也更乐意与国外游客沟通，而国内游客对商品的购买欲望不高，多是走马观花，商铺员工对他们的接待态度也因此较为一般。关于旅游商品类型相同程度高，国内外游客认同的比例都比较高，分别达到了 65.80%和 58.69%，这主要和阳朔旅游商品与同类景区类似有关，不同景区商品同质化是现在许多景区面临的相同问题，在西街很容易找到许多不属于当地特色的放之全国皆可见的商品，如锤大饼，辣子酱，芒果帮等。关于旅游商品存在假冒伪劣产品一项，国内游客的认同率为 37.37%，国外游客的认同率为 54.50%，造成这个结果的原因主要有商品繁多，缺乏管制，参差不齐，国内游客见怪不怪，国外游客对质量要求较高等。国内外游客对

旅游商品价格均为满意度较低，分别 33.82%和 47.71%。这主要和旅游地区商贩对于游客价格不透明有关，会根据游客类型故意抬高价格，造成了游客的普遍不满。

3.3.3 对阳朔旅游环境的评价

关于阳朔旅游环境的评价，指标分为两方面，人文环境和自然环境。其中，人文环境方面共有 4 个指标：当地居民友好、处理投诉效率高、当地商业氛围过于浓郁和社区治安状况好。自然环境方面有 3 个指标：景区环境干净、阳朔空气干净和阳朔噪声小。

3.3.3.1 对阳朔人文环境的评价较高

表 3-12 国内游客人文环境评价表

监测方面(内)		具体监测指标	平均值	方差	满意度比率
旅游环境评价	人文环境	处理投诉效率高	3.2014	3.265	20.31%
		当地居民友好	3.8659	0.948	72.40%
		社会治安状况好	3.6619	0.861	60.26%
		当地商业氛围过于浓郁	3.8787	0.895	67.10%

表 3-13 国外游客人文环境评价表

监测方面(外)		具体监测指标	平均值	方差	满意度比率
旅游环境评价	人文环境	处理投诉效率高	2.8458	1.848	34.01%
		当地居民友好	4.0485	1.055	77.58%
		社会治安状况好	3.6593	1.043	63.23%

		当地商业氛围过于浓郁	3.7389	1.029	62.95%

根据游客人文环境评价表，在投诉效率处理率方面，很多游客都表现了不满意，国内外游客满意比率分别只达到 20.31%和 34.01%。根据访谈发现，由于在阳朔关于旅游投诉的比例较低，因此没有牵涉到旅游投诉的游客都会选择中立态度。因此，投诉处理率方面的均值为 3，满意度过低。其他当地居民友好、社会治安状况好、两项指标中，均值都接近 3.7，满意程度接近 6~7 成，游客对人文环境的总体评价还是较高的。而关于当地商业氛围过于浓郁，国内外游客的认同程度都超过了 6 成，说明当地的商业化还是相当明显的，一定程度上影响了当地的人文环境。

3.3.3.2 对阳朔自然环境基本肯定

关于阳朔自然环境的评价，主要分为景区环境干净，阳朔空气清静，阳朔噪音小三个指标衡量。

表 3-14 国内游客自然环境评价表

监测方面(内)		具体监测指标	平均值	方差	满意度比率
旅游环境评价	自然环境	景区环境干净	3.7603	0.877	67.05%
		阳朔空气清净	4.1284	0.695	82.83%
		阳朔噪音小	3.4593	1.172	51.51%

表 3-15 国外游客自然环境评价表

监测方面(外)		具体监测指标	平均值	方差	满意度比率
旅游环境评价	自然环境	景区环境干净	3.511	1.154	57.08%
		阳朔空气清净	3.9163	0.882	77.43%

		阳朔噪音小	3.0264	1.486	40.00%

根据游客自然环境评价表，国内外游客对于阳朔的景区环境和空气方面的态度还是比较肯定。但是，国内外游客都认为阳朔噪声较大，并且满意度差别比较大。根据访谈发现，这种满意度的差异与游客所选择的具体的酒店位置及其周围环境的差异有关，比如一些游客的住宿选择在了十里画廊附近靠近马路的地方，另一些游客选择了靠山里面的度假酒店。因此造成了满意度波动比较大。

3.3.4 对阳朔旅游的整体评价较高，多数符合或高于预期

关于游客对阳朔的旅游整体评价，国内外游客整体评价均较高，由总体满意度的指标来看，如表3-17，国外游客满意度（86.45%）高过国内游客满意度（73.39%）。同时，从阳朔与游客期望的相符程度来衡量也可以得到相似的结果，国外游客的满意度为96.44%，高于国内游客满意度（74.35%）。如图3-11所示，国内游客的阳朔旅游低于旅游预期的有26%，国外游客只有3%。说明，阳朔旅游的整体评价处于较高水平，许多游客的旅游整体满意度很高。

表3-17 国内外游客整体评价对比表

监测方面	指标	平均值	方差	满意度比率
整体评价	国内游客总体满意	3.843	0.492	73.39%
	国外游客总体满意	4.0794	0.421	86.45%

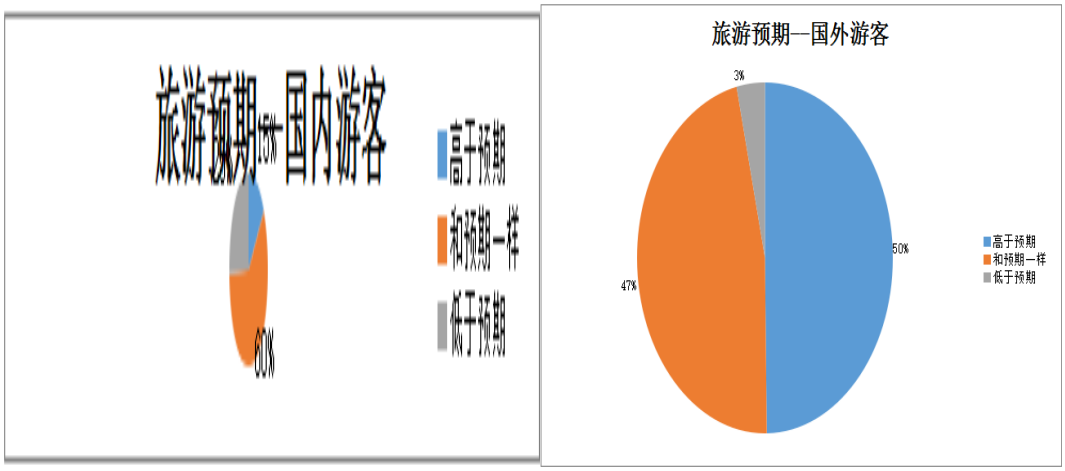


图 3-11 国内外游客旅游预期对比图

3.3.5 推荐意愿高于重游意愿

如图 3-12 所示，游客对于阳朔的重游意愿，约一半呈现积极的态度，即愿意重游阳朔。这也和游客的旅游满意度相关。一般满意度较高，就会有较高的重游意愿。这一方面和客源地距离有关，根据调查发现，阳朔的许多游客均为广西和广东游客。因此，去阳朔旅游会比较方便。另一方面，对于国外游客来说，阳朔的娱乐活动非常符合他们的旅游度假活动，因此，重游意愿也比较高。

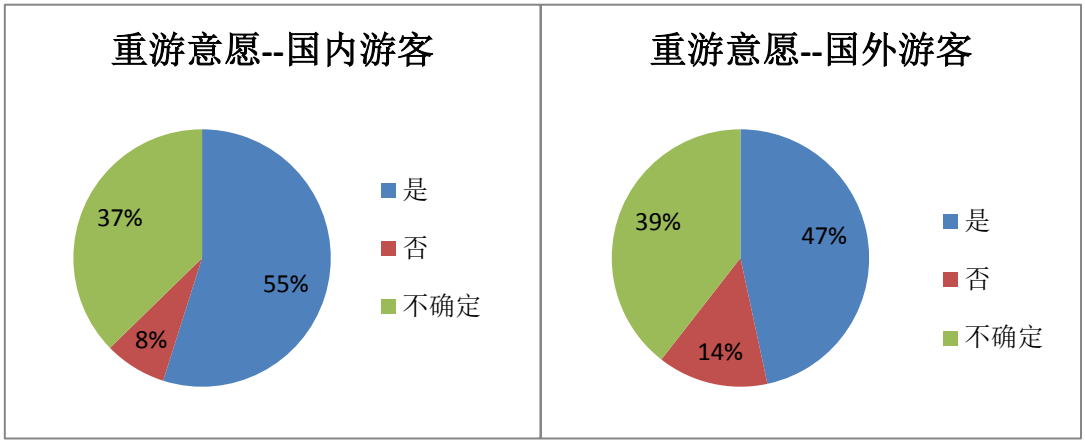


图 3-12 国内外游客重游意愿对比图

根据图 3-13 所示，国内游客有 75%愿意推荐亲朋好友去阳朔旅游，国外游客有 94%愿意推荐身边人去阳朔旅游。两者都很高，但国外游客的推荐意愿高于国内，这和游客的旅游预期相符合。如图所示，国内游客高于旅游预期有 14%，而国外游客却有 50%。高于旅游预期的游客会更愿意将其旅游的地方推荐给身边的亲友，因此，国外游客比国内游客有更多的推荐意愿。

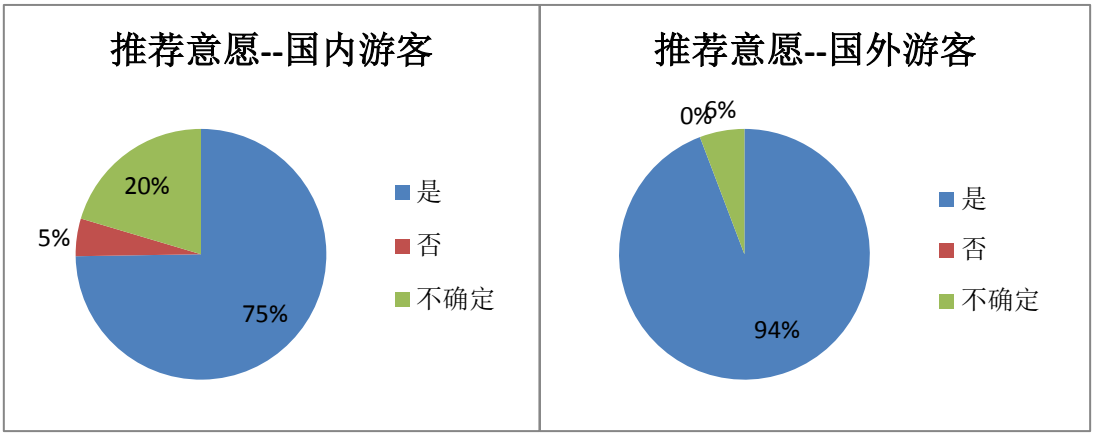


图 3-13 国内外游客推荐意愿对比图

3.4 游客投诉处理情况

根据 2014 年上半年阳朔旅监所的电话记录，2014 年上半年共受理游客投诉、反映、求助 92 起，为游客挽回经济损失 74226 元人民币。其中包括各种类型服务上的投诉问题，如下表 3-18，主要事件集中在竹筏服务和景区服务。其中，投诉数量较多的是竹筏服务（占 46.7%）和景区服务（占 24.4%），旅行社服务（占 11.1%）、导游服务（占 6.7%）、酒店服务（占 4.4%）和公共服务（占 3.3%）的投诉相对较少。

竹筏漂流中的问题主要包括不规范服务及收费现象（25 起）、翻筏导致财务损失（10 起）、强买强卖现象（3 起）、伤人恐吓事件（3 起）和员工服务态度差（1 起）。景区服务的问题主要包括骗取游客钱财事件（11 起）、伤人恐吓事件（4 起）、强买强卖现象（2 起）、售票退票问题（2 起）、员工服务态度差（2 起）和游客不合理要求（1 起）。旅行社服务的问题主要包括预订订票退票问题（5 起）、不规范服务及收费现象（3 起）和伤人事件（2 起）。导游服务问题主要包括不规范服务及收费现象（4 起）、伤人事件（1 起）和骗取游客钱财（1 起）。公共服务问题主要包括公交司机态度差（1 起）、公交线路规范不合理（1 起）、游船设施不齐全（1 起）和双人车店主报失索赔（1 起）。酒店服务问题主要包括不规范服务及收费现象（2 起）和索要发票未给（1 起）。

与 2013 年的投诉问题数量（2013 年上半年 36 起）同期相比，2014 年上半年的投诉数量有所回升。尽管如此，与 2013 年的数据相比较，2014 年国内外游客的重游意愿和推荐意愿的百分比，均略微提高大约 1%至 5%。

表 3-18 2014 年上半年阳朔县监所投诉电话记录

投诉内容	数量	百分比
竹筏服务	42	46.7%
酒店服务	3	3.3%
景区服务	22	24.4%
旅行社服务	10	11.1%
导游服务	6	6.7%
公共服务	4	4.4%

3.5 本章小结

本次的调研监测通过大范围派发调查问卷、现场考察并辅以访谈等方式，对阳朔的游客行为和满意度进行了监测分析。调查研究发现，阳朔游客行为主要特征是倾向自助游、停留时间短、总消费水平不高；游客获取信息的渠道主要是口碑效应。国内外游客到阳朔旅游较多以观光度假为主，而国外游客中，有一部分野外探险游客和了解文化与美食的游客，是两类较值得关注的新兴群体。

3.5.1 自助游游客比例高，停留时间短，总消费有待提高

阳朔游客的旅游方式以自助游（国内游客占 65.4%，国外游客占 70.9%）为主。同时，新兴的旅游方式也开始逐渐发展起来，国内游客也开始脱离大众旅游，追求一些更加特别的旅游动机，例如了解文化和美食、摄影，甚至是野外探险。但国外游客偏爱的野外探险等旅游动机，在国内游客中并不十分流行，这也与中国人的兴趣爱好及传统文化观念有关。大多数游客在阳朔停留的时间短，72.68%的国内游客和 60%的国外游客，仅在阳朔停留 1-3 天。这也限制了旅客在阳朔的消费，在旅游花费方面，国内外游客的旅游花费（总花费）都不多，多集中在 500 元以下（国内 19%，国外 23.85%）和 500-1000 元（国内 31.06%，国外 33.44%）。加之，如今游客对旅游地的文化重视度有所增加，更加注重旅游体验的质量和性价比，因此阳朔应更注重提高旅游产品的服务质量与特色，通过组合式营销，以吸引游客较长时间停留在阳朔，并使游客得到更好的体验。

3.5.2 景区介绍需加强，信息宣传靠口碑

国内外游客接触了解阳朔旅游信息，主要是通过口碑现象。他们的旅游信息主要来源于网络平台和亲朋好友的推荐。其中，国内游客旅游信息来源中，网络占 29.9%，亲朋好友推荐占 29.1%；国外游客旅游信息来源中，网络占 32.48%，亲朋好友推荐占 32.15%。可见，无论是网络平台还是亲友推

荐，阳朔旅游的口碑效应很重要。监测发现，国内外游客最希望获取的阳朔旅游信息是景区介绍，分别占到 19.26%和 20.16%。因此，后期网络平台旅游信息宣传，应注重景区介绍及相关旅游配套信息的说明。

3.5.3 游客对旅游资源、自然与人文环境普遍评价较高

关于阳朔旅游资源丰富、景色优美方面，国内外游客普遍满意度较高，其中国内游客满意度达到 92.58%，国外游客满意度达到 97.80%。关于资源的地方风情，国内外游客满意度分别为 76.30%和 77.31%。可见，国内外游客对于阳朔旅游资源满意度较高。根据游客人文环境评价监测结果，很多游客对当地居民友好、社会治安状况好、当地商业氛围过于浓郁三项指标中，均值都接近 3.7，满意程度接近 6~7 成，说明游客对人文环境的总体评价还是较高的。根据游客自然环境评价监测结果，国内外游客对于阳朔的景区环境和空气方面的态度还是比较肯定。但是，国内外游客都认为阳朔噪声较大，并且满意度差别比较大，因此在今后的旅游发展中阳朔需要特别注意对噪声的控制。

3.5.4 住宿与娱乐服务基本满意，景区、餐饮及公共交通服务还需改善

国内外游客对于阳朔的住宿与娱乐服务基本满意。根据国内外游客旅游住宿服务评价监测，对于住宿服务满意度，国外游客平均值大致为 4，国外游客大多对住宿呈现满意态度；而国内游客平均值为 3.6，国内游客大多呈现中立态度。关于娱乐购物服务项目，国内外游客多数认为娱乐活动丰富，满意度分别为 66.95%和 74.76%，根据访谈发现，国外游客对于酒吧十分钟爱，而阳朔的各类酒吧满足了他们这方面的需求。

根据国内外游客旅游景区服务评价监测结果，关于景区服务方面的评价，国内外游客满意度均不高。在价格方面，国内游客满意度为 37.90%，国外游客为 50.45%；两者对价格均不满意也和阳朔旅游价格不透明有关。在景区员工服务方面，国外游客满意度高于国内游客满意度。经过实地调查发现，景区员工更愿意服务于外国游客，这主要是因为外国游客对于旅游产品愿意支付的价格更高。景区导游解说水平方面，国内外游客满意度均不高且相当。根据国内外游客旅游餐饮服务评价监测结果，国内游客对于餐饮服务的满意度低于 50%，普遍低于国外游客。但是，国内外游客对于餐饮服务均不表示满意。根据游客访谈得知，阳朔餐饮不论在特色、卫生安全、价格方面，均未做到让游客满意。餐饮同质化、价格不透明等，让游客对于阳朔餐饮产生了反感情绪。另外，国内外游客关于交通服务的评价的差异均比较大，主要因为采用不同的交通方式和旅行方式都会影响到交通是否便利。通过访谈，阳朔县内公共交通并不方便，许多地方需要骑自行车或者大巴才能去，公共交通系统并不完善。旅游

团的游客依靠旅游大巴会更方便，但是自助游的游客就会很不方便。国外游客的波动主要因为沟通问题，表现为缺少英文交通标示和能够用英语交流的向导。这也造成了交通服务满意度的波动较大。

3.5.5 国内外游客体验不一，游客体验多符合或高于预期

国内游客认为实际体验高于预期的有 14%，而外国游客则有 50%；认为同预期一样的国内游客有 60%，国外游客则有 47%，反映出满意本次旅游体验的游客占较大部分，说明游客的整体旅游体验较好。但同样可以发现，国外游客的满意度比例高过国内游客将近 20%，这与中外游客在选择的体验项目上的差别也有一定的关系。而在重游意愿上，国内外游客的差别并不大，接近半数的游客都表示会有重游的想法。推荐意愿也同样颇高，表示不会推荐的国内游客仅有 5%，没有国外游客表示不愿意推荐。总体而言，中外游客的满意度和推荐意愿均达到很高的比例，重游意愿的比例也接近了半数；可见，阳朔旅游在国内外游客都有很好的口碑，这有利于阳朔旅游的可持续发展。

第 4 章　健康与安全

健康与安全是衡量旅游目的地可持续发展的重要标准。本次健康与安全的监测主要依靠二手资料并结合问卷数据、访谈资料来完成。一手资料的监测是以游客关注度及游客感知、居民感知为主要的衡量指标。其中健康主要包括食物卫生和环境卫生，安全主要包括游客安全和当地公共安全。

4.1 健康与安全监测指标

表 4-1 健康与安全监测指标

监测方面	主要监测指标
健康	食物卫生
	环境卫生
	游客对食物卫生的感知
	居民对医疗保健的感知
安全	医疗安全与疾病控制
	公共安全
	当地治安状况
	游客对住宿安全的感知
	游客对当地治安的感知
	居民对犯罪率的感知

4.2 健康

4.2.1 食物卫生

为确保食品质量及游客用餐环境安全，阳朔相关部门对当地餐饮行业进行了多次专项检查，切实保障了游客的合法权益。2013 年全年，检测餐具消毒中心样品供 198 份，合格 196 份，合格率为 98.99%。共对全县食品、餐饮、公共场所、药店等从业人员健康体检 5329 人，合格 5316 人，健康合格率 99.76%，不合格 13 人为转氨酶增高。[1]

[1] 数据来源：阳朔县疾控中心 2013 年年度总结

4.2.2 环境卫生

（1）有效展开环境卫生监测行动

阳朔县内开展了全方位的日常及不定期的监测行动，监测对象包括公共场所、餐馆、农家乐、酒店等。监测内容包括场所内的总体环境，特别是食品材料、加工、餐具的卫生情况。

（2）健全、完善并落实公共卫生应急预案

（3）开展重点健康宣传教育专题活动

2013 年阳朔相关单位组织开展了文化科技卫生三下乡、“3.24”世界防治结核病日、“4.7”世界卫生日、“4.25”儿童预防接种宣传日、“5.15”预防碘缺乏病宣传日、科技宣传周、“5.31”控烟宣传日和“6.26”国际禁毒日等大型宣传活动。共悬挂宣传横幅 20 余条，发放各种宣传资料 43 万份，活动咨询人数约 3 万人次。同时充分利用专栏、电视、电影、报刊、短信等形式向公众宣传防病知识，增强群众的健康卫生理念。

（4）加强业务督导培训工作

2013 年共举办各种业务培训班 7 期次，培训人员达 350 人地，对各医疗卫生单位进行业务督导 6 次，基本公共卫生服务项目督导 4 次、手足口病专项督导 1 次。

4.3 安全

4.3.1 医疗疾控安全

2013 年阳朔县疾控中心认真落实了“预防为主”的工作方针，进一步完善了疾病预防控制体系，认真履行防病工作职能，落实重大疾病防控措施，各项工作取得了明显成效。

(1)积极有效处理食源性疾病事件

2013 年共调查处理食源性（食物中毒）疾病事件 2 起，完成病人个案调查 17 份。并大力落实防控措施。最终该事件情况平稳，防止了事态的进一步发展，保障了广大游客的身体健康，维护了阳朔的旅游声誉。

(2)针对传染病问题的疾控措施到位

针对传染病方面的问题，当游客出现身体问题时，阳朔相关部门将会对游客的客源地进行调查，对游客进行全面到位的身体检查。一旦发现传染病，将会及时隔离病人并进行全面的消毒工作，疾控措施迅速、到位。

(3)进一步完善落实《突发公共卫生事件应急预案》

根据突发事件性质、危害程度、设计范围，将突发事件分为三级疫情，并制定相应的应急措施，确定组织领导小组及其相关职责。

4.3.2 公共安全

2013 年阳朔县实现了全年无旅游安全生产事故发生，主要受以下规定及措施影响:

(1)组织各类安全管理知识培训班，增强企业安全意识

旅游局认真组织旅游企业业主和管理人员，参加区、市、县举办的各类安全管理知识培训班，积极开展安全生产宣传活动，牢固树立和提高企业安全意识。

(2)建立健全全县旅游安全责任体系，严格落实旅游安全生产工作

阳朔县旅游局制订了《阳朔县旅游系统防汛应急预案》、《阳朔县旅游接待工作应急预案》，成立了阳朔县旅游安全应急大队。并要求全县的星级饭店和 A 级景区签订《安全责任书》。另外，督导各旅游企业适时完善《旅游安全应急预案》等工作制度。

(3)组织开展旅游安全生产大检查活动

根据区、市、县旅游及安全生产有关部门的要求，结合阳朔县旅游业实际，及时开展节假日、黄金周、汛期旅游安全专项检查和全县旅游安全生产大检查及旅游行业“安全生产月” 等活动。

(4)专项整治重点景（点）区及重点地段

相关部门对漓江非法竹排载客、渔艇、渔船载客等行为进行了集中整治，确保了漓江旅游客运秩序的良好及运输安全。

4.3.3 治安状况

阳朔县治安状况良好。2011 年至 2012 年阳朔县犯罪率下降 10%，2012 年至 2013 年阳朔县犯罪率下降 10%。在全区 111 个县（区）公众安全度和群众对公安机关满意度的测评中，阳朔县 2011 年排名全区第 26 位，2012 年排名全区第 24 位，2013 年度排名全区第 5 位，比 2012 年度上升 19 位，公众安全度和满意度不断攀升。

4.4 游客感知

4.4.1 餐饮卫生

在餐饮卫生方面，国内外游客对其评价主要集中在中立及赞同之间，占样本的 70%以上。其中国外游客的满意度略高于国内游客。由此可见，阳朔的餐饮卫生环境属于中等偏上水平，游客对其卫生环境还是比较赞同的，但仍有 10%左右的游客表示不赞同或非常不赞同，存在一定改进和上升的空间。结合访谈，游客对阳朔餐饮卫生不满意主要有两大原因，一是就餐环境不佳，卫生有待提高；二是食品质量存在问题，部分游客就餐后会出现肠胃不适的现象。

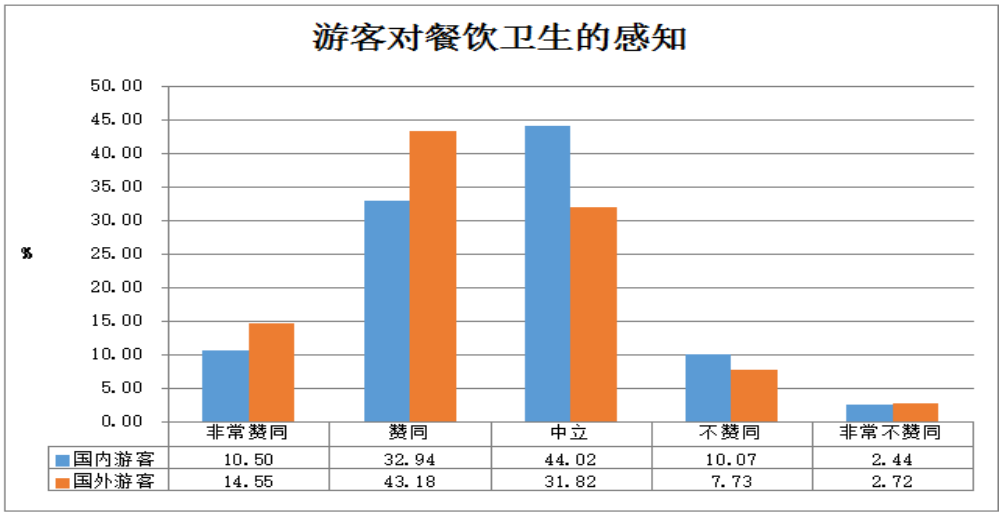


图 4-1 游客对餐饮卫生的感知

4.4.2 住宿安全

在住宿安全方面，国内游客对其评价主要集中在中立于赞同之间，只有约 5%的游客表示不赞同或非常不赞同。而国外游客的则主要集中在非常赞同与赞同之间，没有人对住宿安全表示非常不赞同。

由此可见，游客对住宿安全的满意度较高于餐饮卫生，阳朔整体的住宿安全环境较好，并且国外游客满意度更高。由访谈可知，虽然国内游客普遍对当地特色民俗感兴趣并对其发展表示支持，但往往更倾向于选择标准化的星级宾馆或酒店。其原因大多是对民宿的卫生环境及住宿安全感到担忧，认为其服务及配套设施仍需改进。因此，阳朔住宿安全有一定的提升空间。

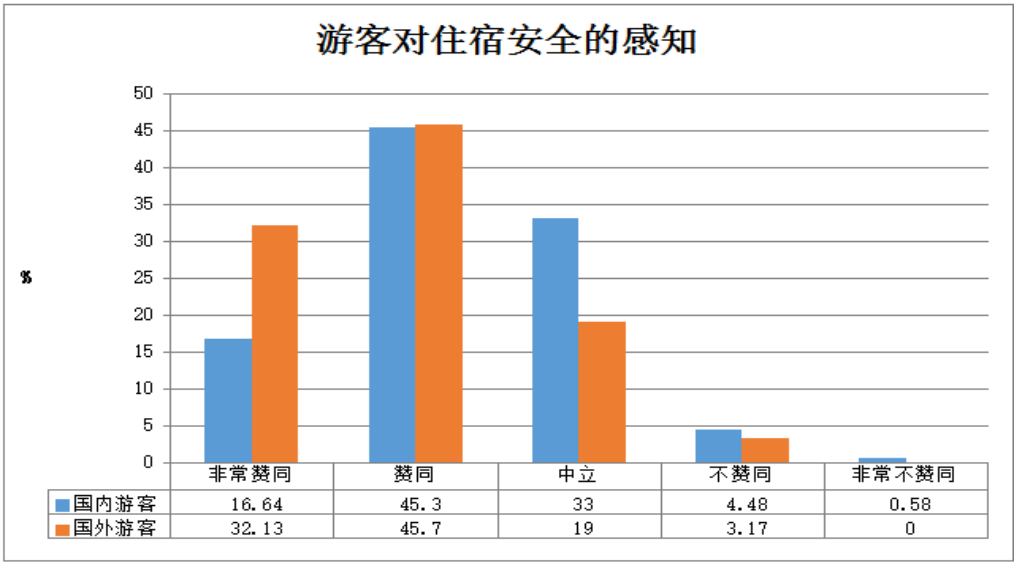


图 4-2 游客对住宿安全的感知

4.4.3 治安状况

在治安状况方面，国内外游客普遍持中立及其以上的态度，其中国内游客满意度略高于国外游客。这表明国内外游客对阳朔的治安环境普遍感到较为满意，人们普遍认同“阳朔是一个安全的旅游目的地”。

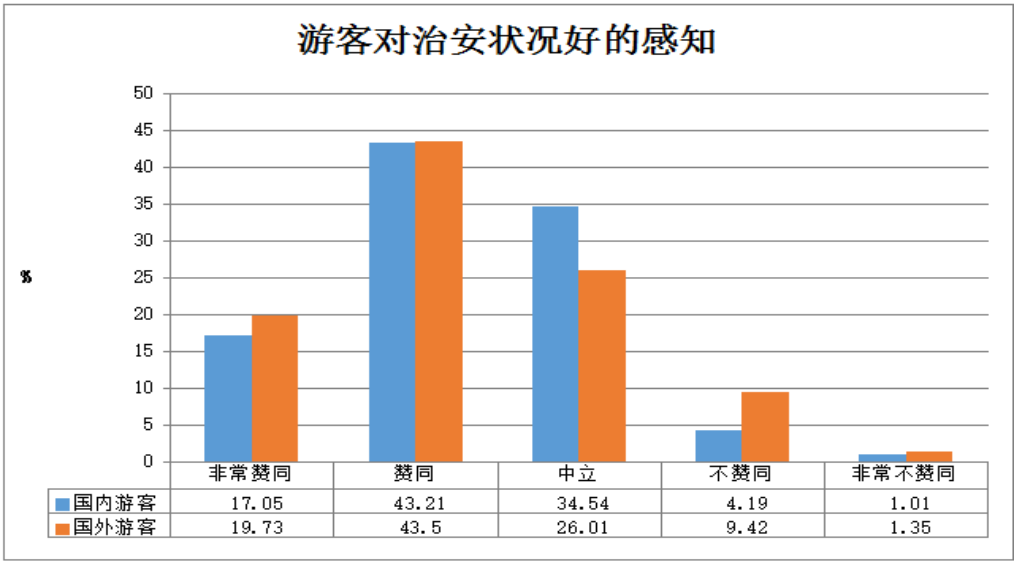


图 4-3 游客对治安状况好的感知

4.5 居民感知

对于“旅游使当地犯罪率上升”这一说法，60%以上的居民对其表示中立、不同意或非常不同意。而在对居民的访谈中，不少人认为近年来相关部门加强了整治力度，偷窃、抢劫等犯罪行为大大减少，阳朔的治安环境有所改善。但是仍有 30%左右的居民感到犯罪率有所上升，因此政府对于治安环境的整治行动仍有待进一步的推进，以保证居民的人身财产安全。

对于“旅游使医疗服务得到提升”这一说法，大多数居民持中立以上的态度。结合对居民的访谈，居民普遍认为近年来阳朔的健康医疗服务水平略有提升，医疗保障体系得到了进一步的完善，特别是针对老年人和儿童的保障方面。总体来说，阳朔医疗环境较好。

表 4-2 居民对健康与安全的感知

项目 / 评价	犯罪率上升（%）	医疗改善（%）
非常同意	6.41	6.64
同意	24.79	39.19
中立	29.91	35.33
不同意	29.70	13.06
非常不同意	9.19	5.78

4.6 本章小结

目前阳朔的健康与安全状况属于中等偏上的水平。游客对阳朔的餐饮卫生、住宿安全及治安状况方面表示相对满意，其中国外游客满意度略高于国内游客，而居民对当地治安、医疗方面也持较为满意的态度。另外，政府相关部门进一步加强了对当地的餐饮及环境卫生的规范和整治，不断改进治安状况，营造旅游安全生产的大环境。

第 5 章　旅游规划与控制

5.1 旅游规划与控制监测指标

在阳朔旅游可持续发展的监测中，对于旅游规划与控制监测的衡量主要包括以下三方面：旅游交通规划与控制、旅游资源规划与控制和土地旅游利用情况。这三个方面的具体监测指标，如表 5-1 所示。

表 5-1 旅游规划与控制监测指标

主要监测方面	具体监测指标
旅游交通规划与控制	道路标准
	客运站标准
	游客交通工具（偏好）
	旅游服务设施与县内交通用地计划
旅游资源规划与控制	核心吸引要素的开发
	观光景点人流量控制
	建筑景观风貌控制
	总体战略层面各类用地控制现状
土地旅游利用情况	旅游发展空间布局规划与用地控制
	主要旅游乡镇的土地利用情况
	土地转换与新增旅游用地

5.2 旅游交通规划与控制

5.2.1 交通规划控制的指标意义

在旅游交通规划与控制方面，具体的监测指标包括道路标准、客运站标准、游客交通工具（偏好）、和旅游服务设施与县内交通用地计划。道路标准可以反映出阳朔县目前交通设施的可承载能力；客运站标准可以反映出阳朔县目前的客流量吞吐能力；游客交通工具偏好能够为后续的交通设施规划方案提供方向；而旅游服务设施与县内交通用地计划则反映目前规划的方向。总体而言，这几个指标能够较为全面的看出阳朔县的交通规划与控制情况。

5.2.2 道路标准需要强化交通标识系统

阳朔县城区道路系统由国道、城市主干道、城市次干道、城市支路和人民步行道组成，其中：过境国道作为城市道路时红外线控制 42 米、主干道红线控制 24-32 米、城市次干道红线控制 12-18 米、城市支路红线控制 7-9 米、步行道红线控制 4-6 米、商业步行街红线控制 9 米。阳朔县城区内有众多的道路类型，大路小道交错，因此对于交通标识的设置提出了比较高标准的要求。而通过问卷数据的反馈信息可以发现，对于“阳朔交通标志系统清晰”该项描述，国外游客持同意态度的只有 33%；中国游客则更少，只占样本总量的 14%，这反映出目前阳朔交通标识系统不够完善，给游客的旅游活动造成了不便，也影响到阳朔作为国际旅游目的地的品牌形象，因此阳朔县城在道路标准上还需要进一步强化交通标识的设定。

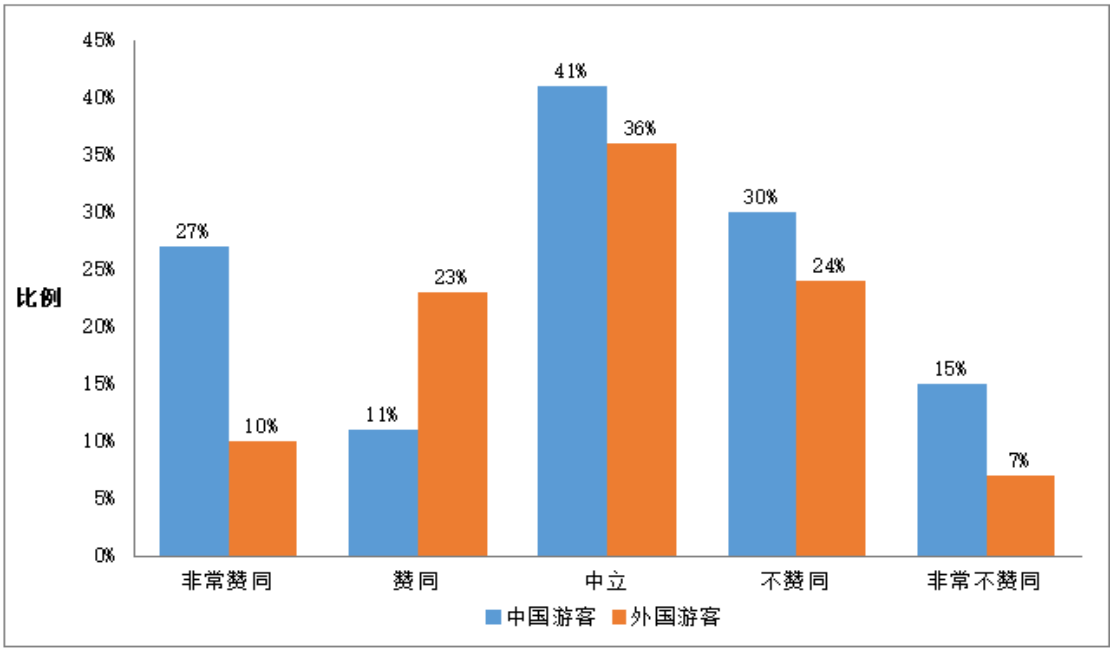


图 5-1 游客对交通标识系统清晰的感知

5.2.3 客运站有待进一步建设

在行政意义上而言，阳朔属于县级城市，其客运站标准为三级标准，即日发送量在 500 以上（含 500）人次的车站（除已列为一、二级车站的县级政府所在地车站；一般旅游区车站）。目前阳朔县有两个客运站，分别是石马圆盘客运站和汽车北站。多年的旅游发展已使得阳朔客运站在客运的规模、班次的数量上都较为成熟，比如每隔 15 分钟分钟便能有一辆客车开往桂林，每隔十分钟就有一趟车开往兴坪，同时阳朔客运站还有多次班次开往广州、深圳、佛山等省外大城市。但阳朔同时也是一个

旅游业发达的城市，其实际客流量远非一般县级城市的标准能够承载，实际的承载量堪比普通的市级城市。现有的客运标准难以满足实际的交通需求。从图 5-2 反应了国内外游客对“交通便利”的感知，仅有 32%的国外游客和 17%的国内游客认为阳朔的交通便利。从访谈游客中得知游客之所以觉得交通不便主要是由于县内交通混乱，红绿灯较少，车辆众多，交通堵塞，其次游客还反应还有部分原因是由于很多地方没有直达阳朔的大巴车，给他们出行造成了一定的不便和旅途周折。因此目前阳朔的客运站的标准还有待进一步提高，以满足大众游客的需求。

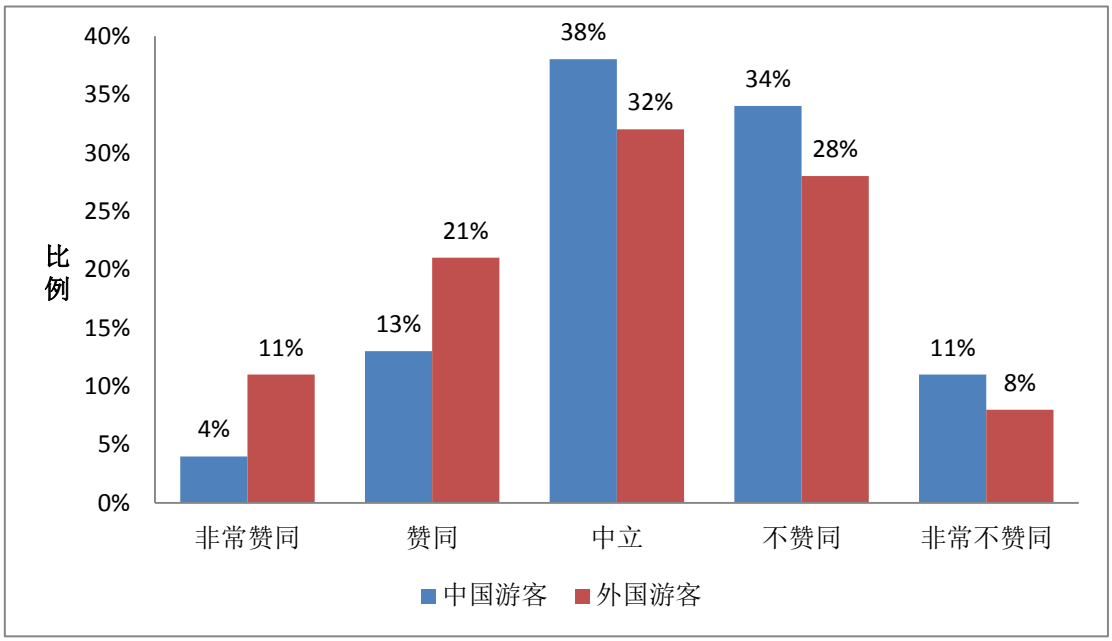


图 5-2 游客对交通便利的感知

5.2.4 道路交通建设应依托游客交通方式

如图 5-3，国内游客到达阳朔的主要交通工具是长途汽车占 44%，相比去年的 64%略有下降，而火车、飞机和自驾车的比例分别为 31%、22%和 19%，相比去年都略有上升。国外游客到达阳朔的主要交通工具是长途汽车（39%）和飞机（33%），另外有 22%的外国游客选择了火车这。对于部分游客而言，并非直接采取客源地到达目的地的方式，此部分游客来到阳朔之前在别处进行了逗留，所以他们到达阳朔的交通方式上存在不止使用一种交通工具的情况。比如外国游客入境采用了坐飞机与乘船的方式，而在选择前往阳朔时才选择了长途汽车或者汽车的方式。值得一提的是随着今年贵广高铁兴坪站的的开通，预计未来列车这一交通工具的使用比例将将进一步提高，国内游客使用长途汽车到达阳朔的比例会有所下降。不过，相对其他交通方式而言，长途汽车选项都是目前游客到达阳朔采用的比例最高的交通方式，因此对于阳朔的交通规划来说，公路系统的完善仍为重中之重。

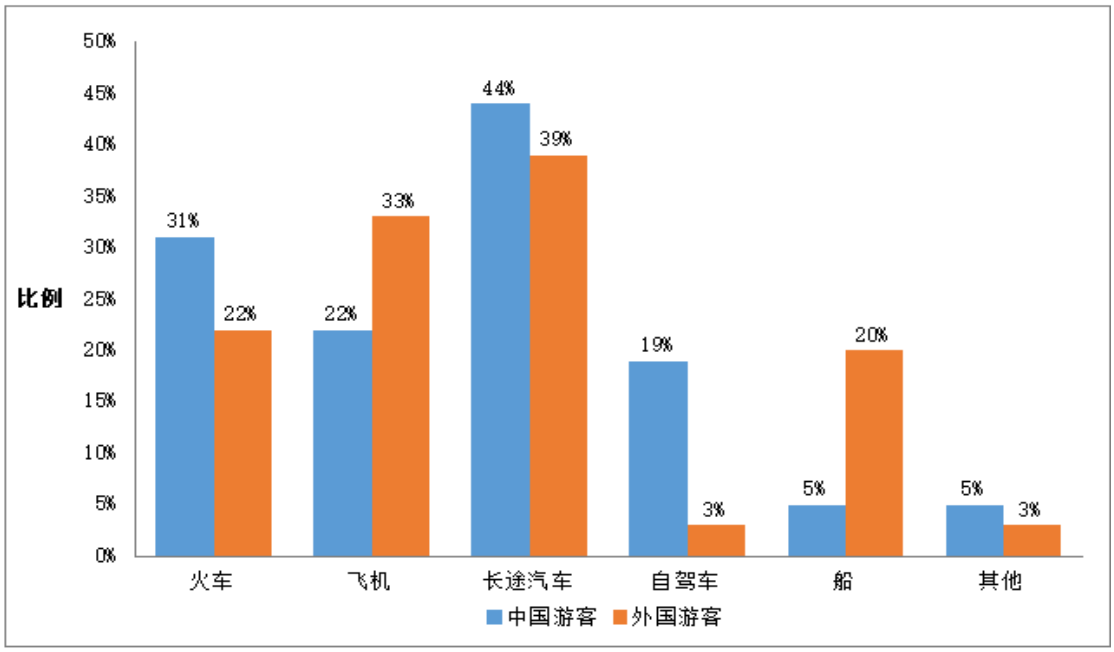


图 5-3 游客到达阳朔的交通选择

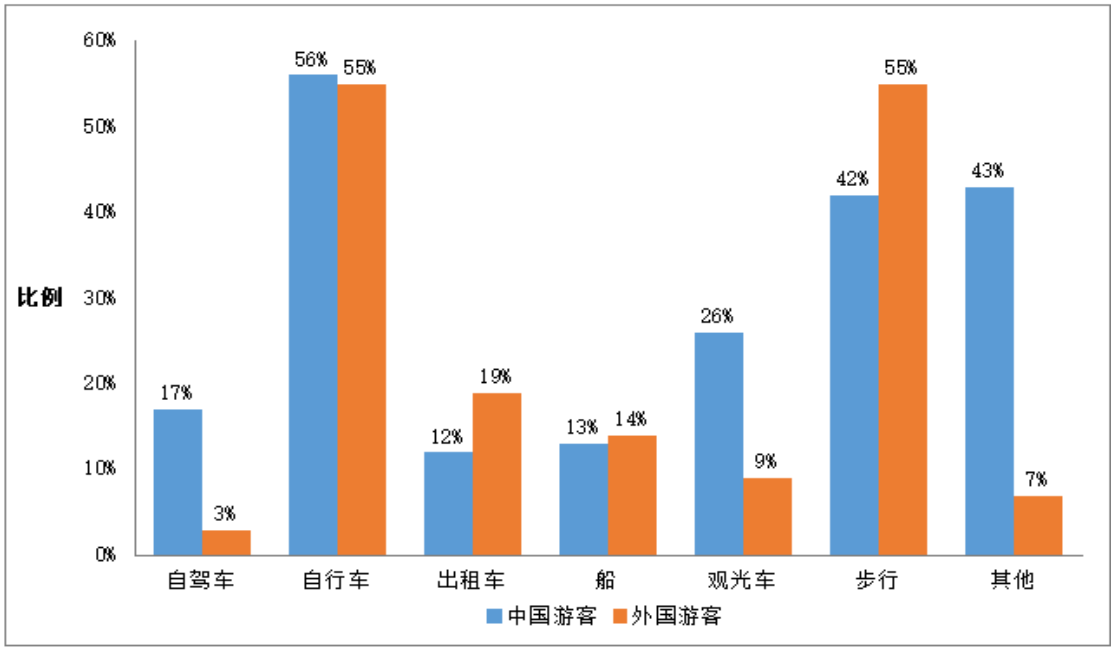


图 5-4 游客在阳朔进行旅游活动选择的交通方式

由图 5-4 所示，国内游客在阳朔游玩时，主要选择自行车（56%）和步行（42%）的方式；国外游客也是主要选择自行车（55%）和步行（ 51%）的方式。因此阳朔县内的交通建设应该着重规划其人行道和绿道。但是，目前阳朔的道路上并没有专业的自行车通道，同时人行道上由于商贩的私自占用而显得过分拥挤。考虑到游客的人身安全状况，规划自行车绿色通道和整治商贩占用人行道是急需解决的问题。

5.2.5 旅游交通体系不断完善

近年来，阳朔县提出了“重点向南，提升北部”的发展方针，坚持以建成区为依托，分片发展，形成“双组团、多分区”的空间发展布局。在 220.74 公顷的旅游服务设施用地来源中，城北组团改造老城区的行政办公用地，以旅游休闲、商业金融、科研教育和居住用地为主，而城南组团则重点建设旅游度假酒店、度假酒店、国际文化交流会议中心和休闲康乐疗养中心，以旅游度假、行政办公、文化体育和居住用地为主。虽然阳朔县的南北组团均已旅游业的发展为重点，但是其发展方向是截然不同的，这点在旅游服务设施建设、县内道路交通两方面有明显表现。

在县内的道路交通方面，矮山至大榕树电瓶车道沿河岸一旁不准建房，另一旁如需建房，必须控制在距车道 200 米以外，穿越村庄部分建筑项目应根据各村庄的具体管理办法实施。为将阳朔县行政中心、文化中心和生活中心从北向南的转移，表达阳朔县北部塑造成以旅游业和相关联产业（如金融业）为主的“旅游区”。对于县内的交通，阳朔县计划将客运站搬至城北组团的凤鸣区，用地 3.97 公顷；在城南组团生活居住区东部设置公交站场，用地 3.76 公顷；在公共活动中心、商务中心、旅游度假区、商业金融区等交通集散地设置停车场 8 除，用地 0.6-11.6 公顷之间；搬迁加油站智大村区北侧，用地 1.6 公顷；在城南组团新建加油站，用地 1 公顷。

对外交通方面，目前阳朔高铁站即将运行，这将极大地缓解阳朔客运站的压力，对内交通方面，阳朔县在西街口已建成了天桥，并且正在建设与蟠桃路平行的隧道，以缓解其县内交通压力，这些都表明阳朔县内的交通体系正在逐渐完善。

5.3 旅游资源规划与控制

5.3.1 自然旅游资源为核心吸引物

阳朔具有丰富的旅游资源，对旅游资源进行合理规划和控制，有助于本地的旅游业更快速更健康地发展。对核心旅游资源和景观的监测，了解游客对核心旅游资源及景观的感知，有助于把握阳朔旅游发展的侧重。如图 5-5 所示，阳朔的自然风光是吸引国内外游客来阳朔旅游最核心旅游资源。对国内游客而言 82%的游客认为旅游地核心吸引物是自然风光，部分游客还看中了阳朔的人文风情（23%）和休闲氛围（23%）；对国外游客来说，高达 91%的游客认为自然风光是旅游目的的核心吸引物。虽然在学术上常认为旅游目的地的人文风情、社区居民、本地建筑、以及当地导游等也可以成为旅游规划中的核心吸引物，但是在前往阳朔的游客市场中反映的强度不大。这一方面说明，阳朔拥

有得天独厚的自然旅游资源，且开发已经相对成熟；另一方面也说明，对于游客而言阳朔并没有突出的文化差异性，因此对于文化建设方面仍有待加强。

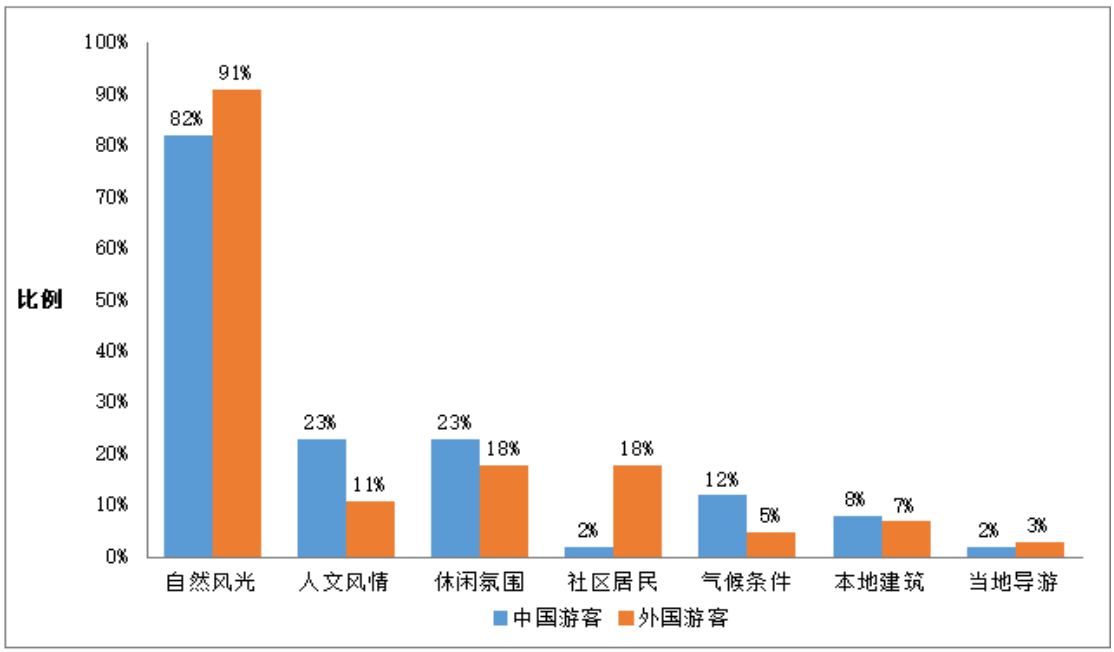


图 5-5 阳朔给游客留下最深刻的印象

5.3.2 游客集中在著名景点

对各景点人流量的统计和监测，有助于使旅游经营者和管理者更好地把握阳朔旅游的动态，制定对旅游业及相关行业的发展决策，以及积极防范对游客旅游过程中危机事件。阳朔各旅游景点的人流量分布并不平均，部分核心的旅游景点吸引了绝大部分游客。由图 5-6 所示，从统计数据表明，西街、漓江漂流、遇龙河、二十元人民等观光景点，成为旅游资源规划和控制的核心景点。其中，国内游客去过西街（88%）的比例最高，其次是漓江（64%）；另外大榕树、遇龙河、月亮山、20 元人民币和的比例也超过 30%；到过蝴蝶泉、图腾古道、鉴山寺和大榕树这些知名度较低的景点多为团队游客，这些景点都是旅行社事先安排好的景点，并没有很多自助游游客选择这些景点进行游玩。国外游客中去过漓江漂流的游客的比例是 84%，其次是西街 70%，遇龙河、月亮山和二十元人民币的游览比例也超过 30%。国外游客去过的景点相对较集中，上述知名度较低的景点国外游客去过的比例均低于 10%。总的来说，游客在阳朔游览时的景点仍集中在几个著名的地方，因而对游客集中景点的人流量控制显得特别重要。

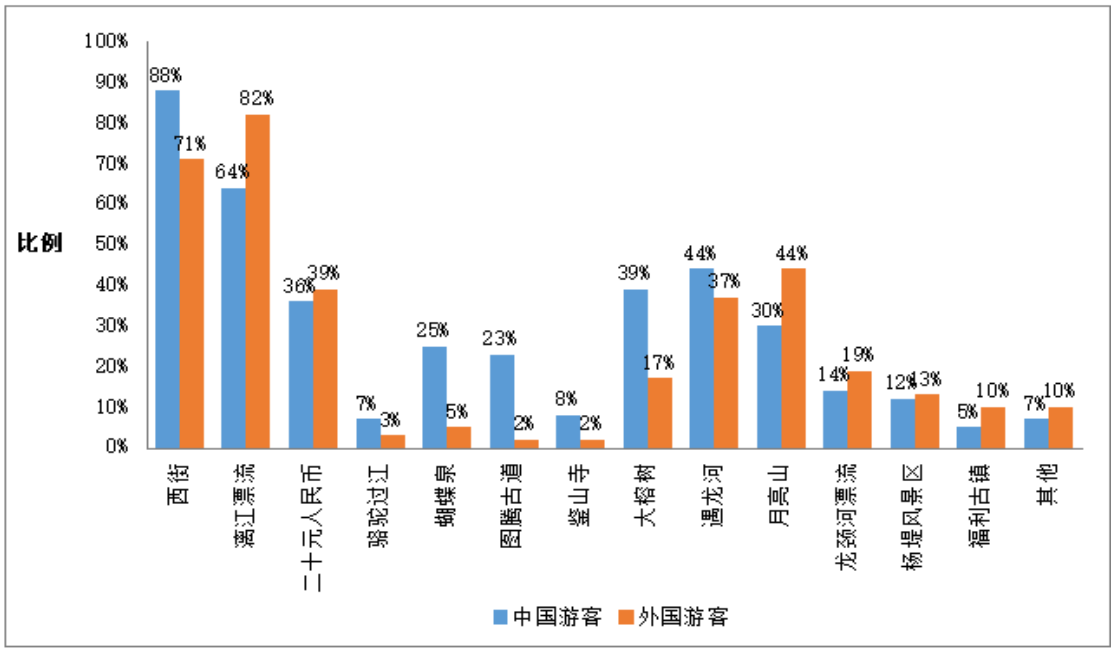


图 5-6 游客观光景点

5.3.3 建筑景观风貌缺乏地方特色

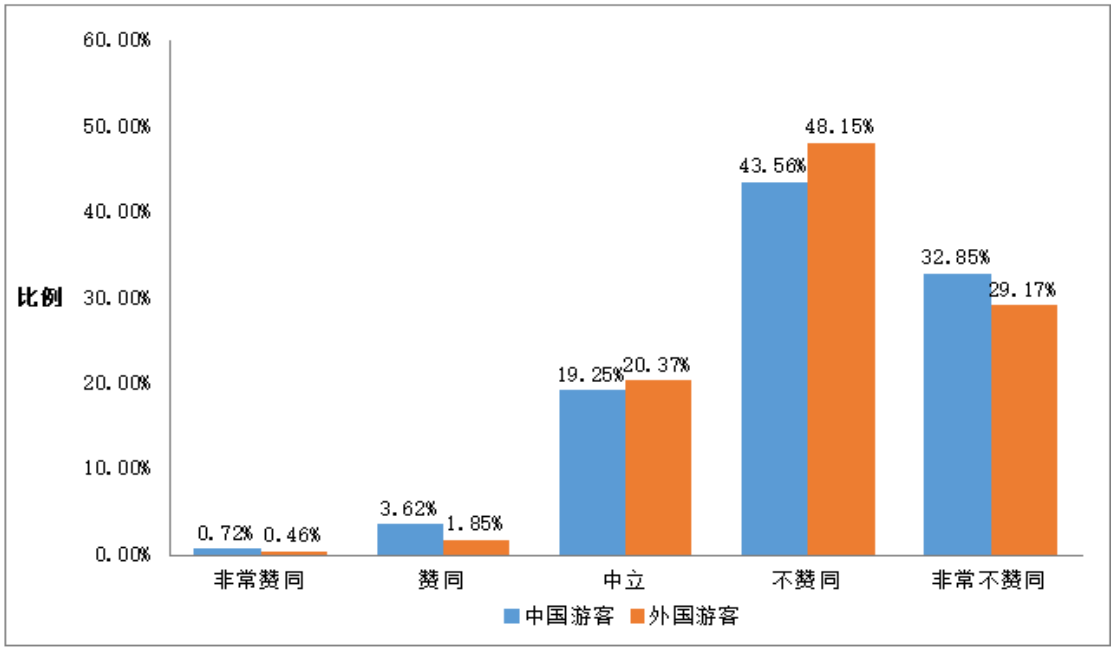


图 5-7 游客对地方风情的感知

旧城核心地区作为阳朔文化内涵与特色的重要载体，整体城市风貌控制上应严格保护，但就目前的情况而言，只有 4.43%的中国游客和 2.31%的外国游客认为阳朔是个有地方风情的地方，可见阳朔在营造地方风情方面还有待加强。据访谈了解游客认为阳朔缺乏地方风情的原因主要是由于县城比较现代化，缺少本地的特色建筑，阳朔西街与城市中的步行街差别不大，不能展示出其独特的地方。而

认为阳朔具有地方风情的游客多数是去过旧县的，他们认为旧县的房屋比较有阳朔风情，是阳朔的本地建筑，并且对基于老房子进行内部改造的客栈——秘密花园评价极高。在现代化与全球化的冲击吓，阳朔如何妥善利用各种自然景观和人文景观，整治、恢复和展示原有历史文化感知元素，挖掘城市历史文化内涵，体现阳朔国家级历史文化名城核心风貌其目前面临的较大的难题。

5.4 旅游用地比例适度提高

表 5-2 阳朔县主要旅游乡镇土地利用情况（2006-2020）

（单位：公顷）

土地用途类别	阳朔镇	白沙镇	福利镇	兴坪镇	高田镇	杨堤乡
土地总面积	7528.95	15383.14	23285.21	31376.89	15492.93	10263.55
林地区	1831.07	4667.48	6344.59	10028.94	7984.56	5632.98
	24.32%	30.34%	27.25%	31.96%	51.54%	54.88%
城镇建设用地	860.1	121.27	116.23	49	50.06	0
	11.42%	0.79%	0.5%	0.16%	0.32%	0
农村居民点用地	139	402.99	498.75	375.94	392.92	125.35
	1.85%	2.62%	2.14%	1.2%	2.54%	1.22%
采矿与独立建设用地	71.15	160.07	110.98	133.4	134.88	30.56
	0.95%	1.04%	0.48%	0.43%	0.87%	0.3%
风景名胜与自然人文保护区用地	1940.64	2168.54	3899.89	13143.08	976.71	2397.79
	25.78%	14.1%	16.75%	41.89%	6.3%	23.36%
其他用地	411.84	811.73	4584.22	1179.71	545.08	486.98
	5.47%	5.28%	19.69%	3.76%	3.52%	4.74%

（资料来源：阳朔县国土资源局）

旅游的快速发展给当地带来的经济效益，使得越来越多的土地转化为旅游用地。但如果过多的土地转化为旅游用地，可能会使当地的生态环境遭到破坏，当地的发展失去平衡。由于土地的稀缺性，阳朔的土地利用应严格执行《阳朔县土地利用总体规划（2006-2020）》（下称《规划》）。《规划》显示整个规划期内，农场内居民点用地面积减少 307.81 公顷，其中有 65.48 公顷转化为旅游用地。旅游用地主要是农家乐用地、旅游村落用地。农家乐用地主要分布在阳朔、白沙、福利、兴坪、葡萄、高田等乡镇；旅游村包括高田镇的龙潭旅游村、兴坪镇的兴坪渔村和白沙镇的旧县旅游村。土地的利用的方式主要是转用、整理与综合治理等。在整个阳朔县土地利用分配中，风景名胜与自然人文保护

用地所占的比例最高，为 25.78%，其土地利用的重点方向是保障城市发展和基础设施、旅游服务设施的建设。

不同乡镇土地利用方向也不尽相同，要结合自身乡镇的特色和发展方向合理分配、利用土地。以兴坪、高田两镇为例。坐落在漓江边上的兴坪镇，不仅是阳朔县面积最大的乡镇，同时也拥有着非常丰富的旅游资源，是漓江风景旅游带精华区域的所在之处，其风景名声与自然人文保护区用地的面积也是最大的，为 13143.08 公顷，占兴坪镇土地总面积的 41.89%左右，兴坪镇以发展生态、探险旅游为重点，逐步打造成阳朔县旅游次级中心城镇和铁路交通中心。高田镇是阳朔县最大的旅游工艺品生产基地，虽然镇内也有如大榕树、月亮山、聚龙潭等知名旅游景区，但高田镇土地利用的方向仍需以保护、整理耕地为重点，保障蔬菜、园地、设施农业用地需求，合理保障工艺品加工和旅游设施用地。表 5-3 显示了规划中的阳朔县主要旅游乡镇土地利用情况。

5.5 本章小结

旅游资源规划和控制是旅游业发展计划的重要组成部分，是保持旅游行业持续、稳定、协调发展的重要手段。对旅游交通资源、旅游核心景观资源、旅游土地资源进行合理地规划与控制，可以使得阳朔的旅游发展更为快速、均衡。及时发现问题、解决问题，为未来的发展提供建议，尽可能地避免因旅游发展失衡而滞缓当地整体的发展。结合监测的结果，监测小组对阳朔旅游资源规划和控制提出下述几点建议：

5.5.1 增加对旅游交通的规划和建设力度

根据监测，相关部门还应加大对阳朔旅游交通规划的重视程度。目前旅游大巴仍是游客旅游交通的首选，但伴随着自驾游游客数量的不断增加，自驾汽车数量显著地增加，因而造成公路交通的承载压力受到了进一步的挑战。

5.5.2 加强对自然旅游资源的保护

在旅游资源方面，游客对核心吸引物和重点观光景点的选择偏好影响了旅游资源的规划和控制。从市场的反映来看，游客在选择上更为倾向自然风光，如漓江、遇龙河、月亮山和大榕树等自然类景区是阳朔发展旅游的核心旅游资源。因此，应加强对自然类景观的维护，注意自然环境的保护、自然类景观基础设施的维护等，此外还应加强对自然类景区经营的有序监管等方面内容。旅游流量上，西街、漓江、遇龙河、月亮山和大榕树等地人流量相对较大，在合理开发的同时应注意人流的疏导。

5.5.3 根据阳朔旅游业发展制定合理规划

此外，土地功能的转变及对其的利用和是旅游目的地可持续发展规划的基础。阳朔的旅游规划与控制必须按照自身的实际情况，用发展的眼光制定切实可行的计划，并对规划的实行做严格的控制和要求。在规划和控制过程中，不仅要考虑旅游交通，还要把旅游资源禀赋、土地利用以及城市的建筑景观风貌等因素综合起来考虑，趋利避害，控制负面因素的影响，在规划中保证其科学性和合理性，为阳朔旅游业的发展奠定坚实的基础。

第 6 章　旅游的经济效益

6. 1 旅游经济效益检测指标

在旅游经济影响部分，参照 UNWTO 的经济效益指标检测体系，结合阳朔的实际情况，选取了如下的指标：

表 6-1 旅游经济效益监测指标

主要监测方面	具体监测指标
旅游收入	旅游统计数据（旅游总收入、游客总量、床位数、平均停留天数、过夜人数等）
旅游对阳朔GDP及财政的贡献	旅游收入在GDP中的比重
	旅游收入对财政税收的贡献
旅游对产业结构的影响	旅游带动的第三产业的总体发展趋势（企业的所有制、外来业主的比例）
	旅游发展对阳朔农业结构的影响
旅游对阳朔手工商业发展的影响	旅游促进的住宿餐饮业的发展趋势
	旅游促进的手工业品及特色农业发展趋势
旅游对阳朔社会就业的影响	旅游创造的就业机会现状
	旅游企业的竞争状况
	旅游带动的居民培训及相关技能提升（县城范围内英语培训机构的数量，企业对就业人员英语技能的要求）
	旅游对员工薪酬水平和满意度的影响
旅游对阳朔投资的影响	县投资促进局数据、业主对投资状况的感知
旅游季节性	旅游统计数据（入住率、月份游客数量）
	企业淡旺季
	旅游季节性对就业的影响

6.2 阳朔旅游发展趋势总体稳定上升

据阳朔旅游局统计数据显示，2014 年上半年（数据统计到 5 月），阳朔县接待游客总数为 379.1 万人次，同比增长 6.5%，旅游总收入 20.43 亿元，同比增长 16.9%。其中，接待国内游客 325.7 万人次，接待海外旅游者 53.4 万人次，接待入境过夜旅游者 24.3 万人次,游客人均消费为 538.9 元/人,人均停留天数为 2.24 人天。

表 6-2 阳朔游客相关统计数据（2010——2014.5）

年份 / 指标	2010	2011	2012	2013	2014 年 1-5 月
旅游总人数（万人次）	811.3	935.6	1050.3	1170.8	379.1
其中：国外（万人次）	123.8	155.3	171.2	188	53.4
住宿人数（万人次）	279.2	315.8	-	432	178
平均停留天数	1.38	--	-	-	2.24
旅游总收入	31.5	36.6	50.2	60.5	20.43
游客人均消费（元/人）	388.3	412.6	-	516.7	538.9

（资料来源：阳朔县旅游局，“-”表示数据暂无）

从 6-2 中可以看出，阳朔旅游总人数继续保持稳定上升的态势，在旅游总收入方面继 2012 年突破 50 亿元关口之后，2013 年再次创造 60.5 亿元的历史新高，阳朔旅游业总体保持稳定上升的趋势，住宿人数、人均停留天数以及游客人均消费均有一定程度的上升，也表明阳朔旅游的基础设施和其他旅游发展条件日益完善，对旅游者的总体吸引力有所增强。

阳朔县 2014 旅游经济社会发展任务是：完成“十二五”时期旅游经济社会发展任务，实现旅游人数年均增长 10%，旅游总收入年均增长 20%的目标，即 2014 年旅游人数实现 1289 万人次，旅游收入实现 72.6 亿元。

6.3 旅游对阳朔 GDP 和财政收入的贡献

6.3.1 旅游业对 GDP 贡献率逐年增加

旅游卫星帐户对旅游 GDP 贡献率的衡量主要采用旅游收入增加值与总 GDP 进行比较，但就阳朔县而言，目前难以统计到旅游收入的增加值，这里采用旅游收入在 GDP 中的比重来代替。

表 6-3 2011-3013 年上半年阳朔 GDP 及旅游总收入增长情况

年份	GDP（那当年价）（亿元）		旅游业（按当年价）（亿元）		旅游业在 GDP 中的比重
	总值	增长率	总收入	增长率	
2001 年	10.54	-	2.14	-	20.30%
2002 年	11.36	9.32%	2.41	12.62%	20.21%
2003 年	11.75	9.18%	2.44	1.24%	20.77%
2004 年	14.31	14.57%	4.06	66.39%	28.37%
2005 年	17.89	7.74%	5.51	36.21%	30.80%
2006 年	22.91	23.32%	9.64	74.85%	42.08%
2007 年	33.06	10.30%	12.77	32.47%	38.63%
2008 年	39.67	10.30%	17.90	40.17%	45.12%
2009 年	43.23	10.96%	24.20	35.20%	55.98%
2010 年	56.12	24.10%	31.50	30.17%	56.13%
2011 年	69.03	23.00%	38.60	22.54%	55.92%
2012 年	76.40	10.68%	50.20	30.05%	65.71%
2013 年	84.39	9%	60.5	20.5%	71.69%
2014 年上半年（1-5 月）	-	-	20.43	16.9%	-

（资料来源：阳朔县政府工作报告，阳朔县旅游局，“-”表示数据暂无）

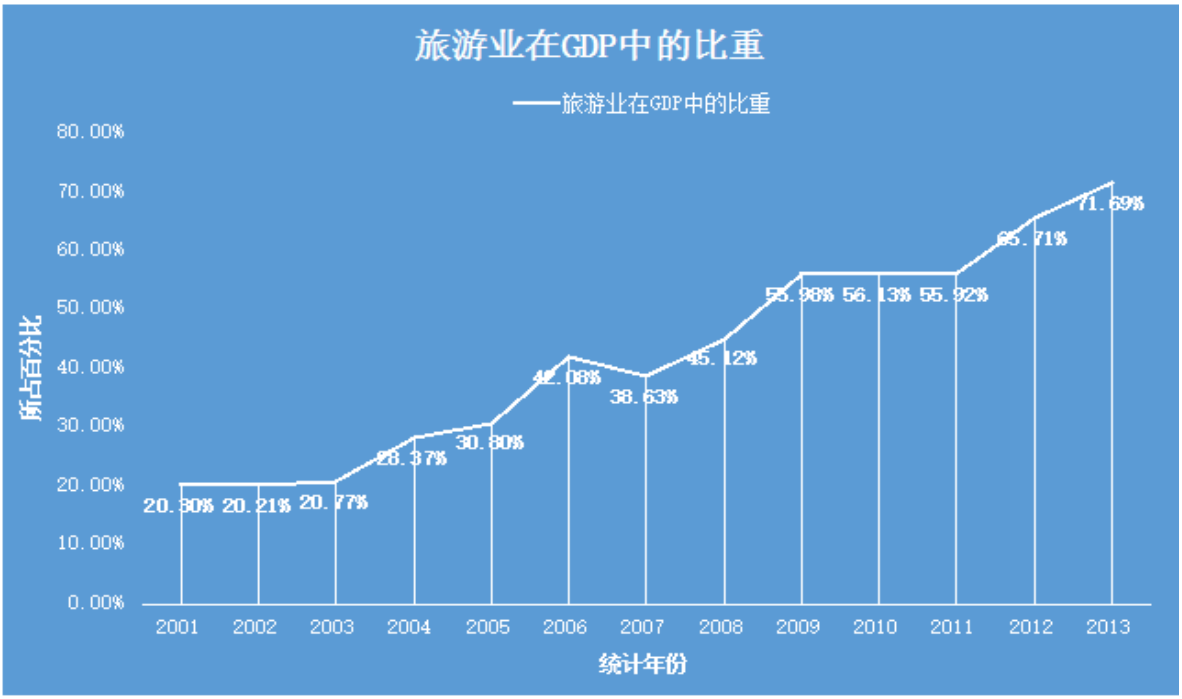


图 6-1 阳朔县旅游业在 GDP 中的比重

从表 6-3 和图 6-1 可以看出，自 2001 年以来旅游业对阳朔县的 GDP 贡献一直在上升，虽然中途个别年份有回落和波动，但是总体而言旅游业对阳朔 GDP 的贡献处于不断增长的态势。而且 2012、2013 年旅游业对阳朔 GDP 的贡献率均大幅上升分别突破 60%和 70%，说明近两年旅游对阳朔经济贡献进一步提高。在监测过程中，当地居民对这一点也有很深刻的感知：“阳朔嘛，就是靠旅游”“阳朔就是旅游了”，类似的回复屡见不鲜。

6.4 旅游季节性仍然存在

2013 年，阳朔的旅游仍然表现出一定的季节性。在接待人数方面，7-11 月接待国内旅游者均超过 30 万人次，1-2 月则不足 25 万人次，虽有一定季节性但差异不是特别明显。而接待入境旅游者全年分布较为平稳。在旅游收入方面，季节性变化与接待旅游者人数基本一致，8-11 月平均旅游收入达到 44031.22 万元，而 12-3 月平均旅游收入仅为 12228.14 万元。游客人数与旅游收入表现出来的季节性与暑假市场、黄金周有着密切的关系。

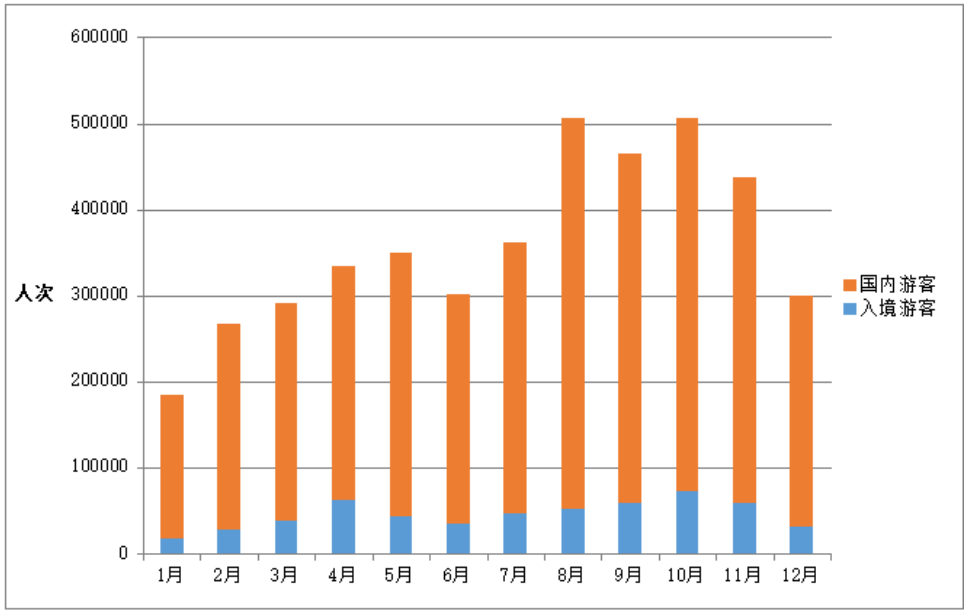


图 6-2 2013 年各月份阳朔接待国内旅游者与入境旅游者人数

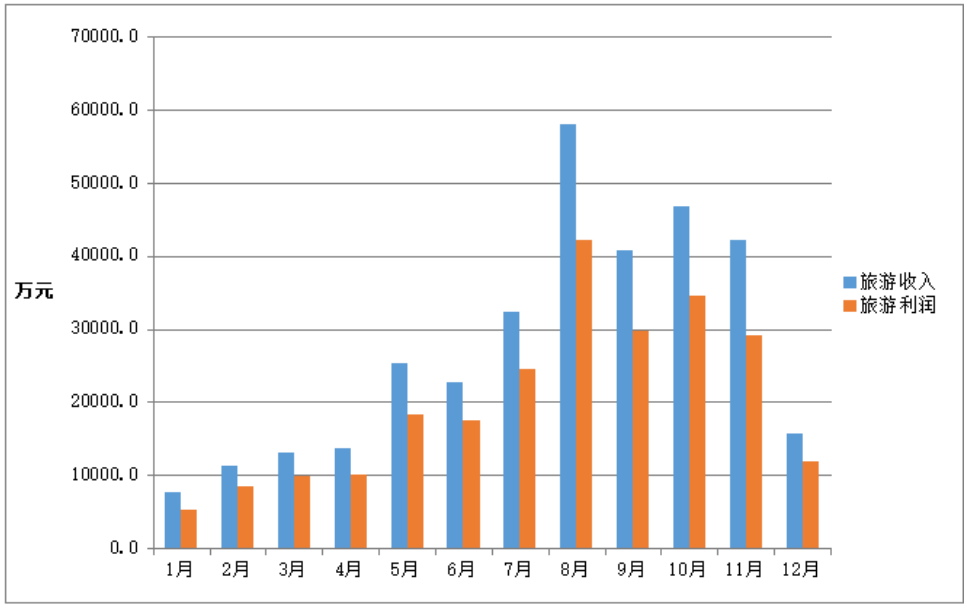


图 6-3 2013 年各月份阳朔旅游收入与利润

通过对业主问卷的分析发现，28.95%的业主选择了旺季开始的月份为 5 月，25%的业主选择了 7 月，21.05%的业主选择了 4 月，56.41%的业主选择了旺季结束的时间为 10 月。结合游客人数与旅游收入的数据，可以大致判断阳朔的旅游旺季为 4-10 月。

旅游的季节性影响了阳朔旅游企业的雇工人数与旅游就业机会。在 80 家企业中，除了 38 家企业没有雇工外，在有雇工的企业中，旺季雇工平均为 7.55 人，淡季雇工平均为 5.45 人，并且企业间旺

季雇工人数差别较大。在实地的监测中也发现，不少企业特别是青年旅馆会在暑假期间聘请“志愿旅游”者，而西街及其周边的餐馆和餐厅则大都会招收暑假工，提供了大量的短期就业机会。

6.5 旅游业招商引资创历史最好水平

近年来，阳朔县以实施“旅游立县”、“工业强县”、“科学兴县”的发展战略为起点，将旅游休闲度假目的地、农产品生产加工基地作为阳朔县未来发展的总体定位，不断推动全县经济的发展，在对外开放、招商引资方面取得了一定的成果。台商投资的桂林阳朔山水旅游开发有限公司（世外桃源）及桂林山水石业有限公司、桂林广维文华旅游文化产业有限公司（印象刘三姐）、马来西亚富都有限公司投资的阳朔百乐来度假酒店、新加坡客商投资的桂林阳朔泉野酒店开发有限公司和阳朔悦榕度假山庄有限公司、以及广东客商投资的阳朔河畔度假酒店有限公司等一批知名企业相继落户阳朔，成为当地旅游、文化、地产等支柱产业。

2013 年，阳朔县稳步推进“广西特色旅游名县”建设，立足高端旅游精品项目建设，进一步加强旅游项目招商引资，新签亿元以上项目 4 个，内资到位 15 亿元，外资到位 3100 万美元，引进了“罗兰夏朵”、“弘尚圣景旅游健康产业项目”、“新加坡瑞胜休闲大世界”等一批新型高端旅游项目，招商引资指标创历史最好水平。2014 年上半年，阳朔县新增重大旅游投资项目 5 个，继续投资项目 5 个。2014-2018 年，阳朔县的重大旅游建设项目包括：阳朔瑞盛旅游休闲世界项目，总投资 30 亿，建设内容为休闲景区、游乐园、游览设施、度假酒店等旅游基础设施；阳朔县生态农业旅游建设工程，总投资 6 亿，建设内容为“春之花、夏之凉、秋之实、冬之雪”为主题的休闲农业与乡村旅游线路；阳朔县凤凰谷休闲养生度假区项目，总投资 21.8 亿，建设内容为一个集乡村、健康养生休闲、艺术创意体验及特色风情文化街区为一体的休闲养生度假地；阳朔县特色旅游小镇和旅游村庄建设工程，总投资 50 亿，建设 9 个特色乡镇；阳朔县旅游客运码头改扩建工程，总投资 1.5 亿，建设内容为改扩建旅游客运码头 9 座。另外，还将计划投资亿元以上的储备项目 11 个。

除了阳朔县的各政府部门积极引进旅游投资外，当地的旅游企业主也依然看好阳朔的旅游投资潜力。通过实地问卷调查，79 位业主对阳朔旅游投资的平均评分值为 3.92 分，不看好阳朔旅游投资的业主比例从 6.6%下降至 3.8%。因此，阳朔县企业主目前对阳朔旅游投资潜力比较看好，并且比去年相比更为积极。

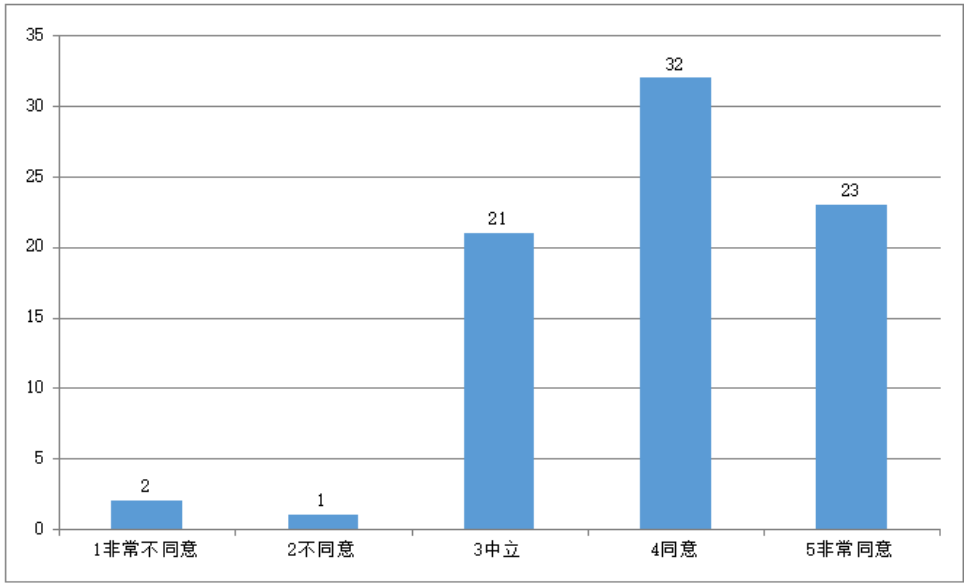


图 6-4 阳朔企业主对旅游投资的看好程度

6.6 旅游对居民就业的影响

6.6.1 为本地居民提供更多就业机会

在居民的问卷调查中，数据结果显示调查的 468 位居民对“旅游的发展为我们带来了更多的就业机会”这一题项评分的平均值为 3.95 分，80.13%的居民都同意旅游发展给他们带来了更多的就业机会，这说明居民普遍意识到旅游对当地就业带来的积极影响。

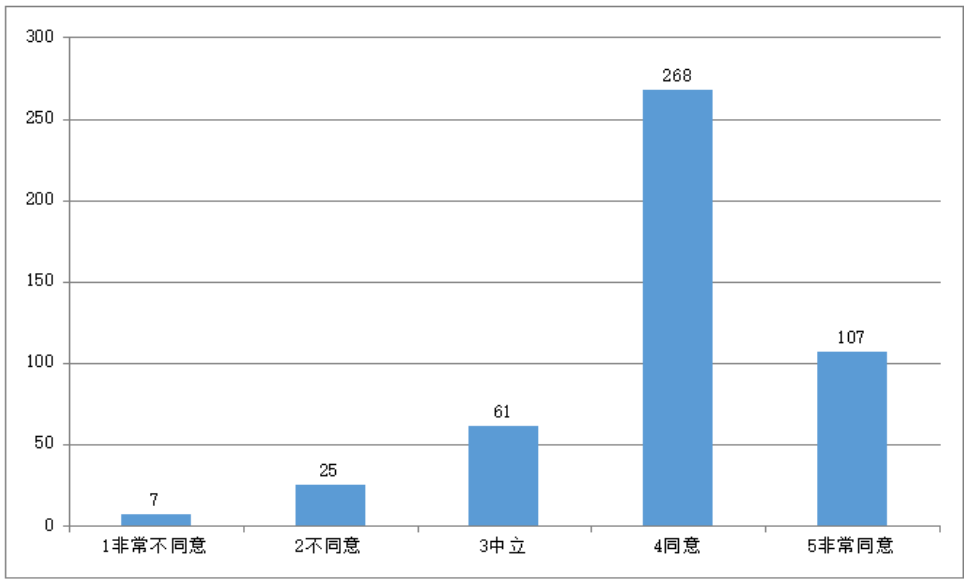


图 6-5　旅游的发展为我们带来了更多的就业机会

在旅游企业员工的问卷调查中，被调查的旅游企业员工有 58.3%为阳朔县居民，7.8%来自桂林市（不包括阳朔县），14.4%来自广东省其他地区，7.2%，17.2%。而在这些被调查的样本中，有 53.4%的员工认为当地能够给务工者提供足够的就业机会，同时，也反映出阳朔旅游业能够吸引了不少外地人前来务工。

6.6.2 促进农村人口向其它产业转移

阳朔是传统的农业县，农业是阳朔的基础产业。但旅游的发展改变了当地居民的就业结构，农村劳动力向其它产业转移。同时，旅游与农业的结合也促进了阳朔农业的发展和新农村的建设。2013 年，阳朔县农民人均纯收入 9592 元，增长 14.5%，三次产业结构由 2008 年的 27.6 ：30.9 ：41.5 进一步优化调整到 24：36：40，劳动力从第一产业向第二产业和第三产业转移，其中第二产业发展势头较好。

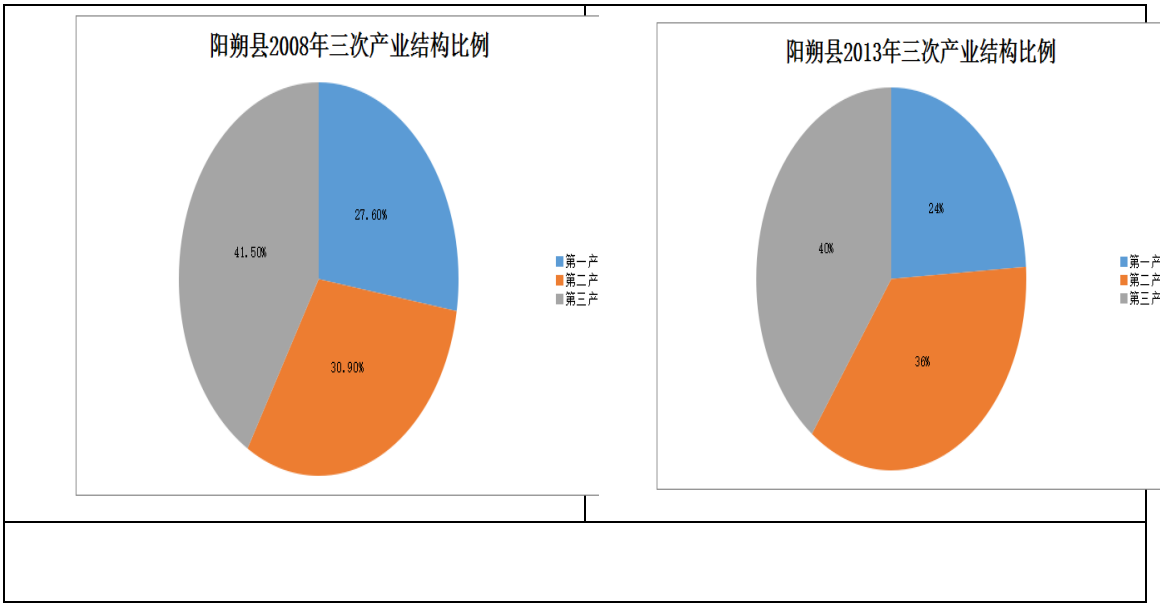


图 6-6　阳朔县三次产业机构变化：2008 年与 2013 年对比

6.6.3 带动教育培训产业发展，提高就业技能

由于阳朔国外游客的大量涌入，当地很多居民英语水平都相当不错。阳朔最初是外国游客多于中国游客，在旅游开发初期，居民与国外游客有着充分的接触，使居民得以学习英语，提升了自己的能力，能够更好地就业，改善生活水平。一个典型的例子——“月亮妈妈”，当地一个土生土长的阳朔居民，她最初通过为外国游客带路逐渐学会外语，成为了一个专业的英语导游，现在她除了获得就业机会外，还建立了自己的品牌——“月亮妈妈”，并将其运用于自家开的餐饮店里。

此外，阳朔作为“国际级的休闲旅游度假城镇”，成为了中西文化的汇集地，其旅游的发展也促进了当地教育培训组织的发展。这些教育机构不仅能促使当地居民参加英语培训，提升就业能力，同时也吸引了很多外地游客前来学习英语，为当地旅游发展做出贡献。在实地调察中也发现，暑假期间会有一些英语夏令营或英语培训班在阳朔举行。

而在对居民和员工的问卷调查中，有 35.7%的居民表示自己平时有学习英语的习惯，有 45.4%的员工表示自己平时有学习英语的习惯。在对旅游企业主的问卷调查中，除了没有雇工的企业，有 53.3%的业主表示自己企业的大部分员工可以与外国游客进行基本的交流，有 55.9%的业主表示英语成为自己招收员工的必要技能。在实地调查中也发现，西街及其周边大部分酒吧、餐厅、旅馆的服务人员都能与外国游客进行基本交流，甚至江边摆摊的中老年妇女也能用英语来招揽顾客。

6.7 旅游对产业结构的影响

将阳朔县城商铺分成了九大类，其中前七类与旅游业直接相关，为细化分析对旅游业的产业结构的影响，针对县城旅游商铺的具体分析将放在本报告 6.8 一节进行，本节为显示旅游对产业的影响仅重点讨论其中的旅游纪念品类商铺的情况。

6.7.1 当地特色农业的发展

本报告 6.6.2 图 6-6 显示了旅游发展之后阳朔县第一产业比重的相对下降，但同时阳朔县种植结构得到优化。当地因地制宜，利用地方自然优势，发展金桔等特色农产，阳朔县的白沙镇也因此被评为金桔之乡，其沙田柚也非常出名。2013 年阳朔农业产业稳步发展。完成农林牧渔业总产值 31 亿元，增长 5.73%。其中粮食总产量达 12.01 万吨，增长 2.7%。在特色农业方面，新发展金桔 1.59 万亩，总面积达 17.4 万亩，总产量达 17.93 万吨，面积、产量和效益均居全国之首。砂糖橘、夏橙、沙田柚、黑皮果蔗、淮山等特色产业效益不断提升，蜂蜜和漓江甲鱼产量连续三年保持全市第一。

值得注意的是，2013 年阳朔启动了金桔国家标准研制工作，也成功举办第十一届金桔交易会 第三届苗木花卉交易会、第二届跨国零售企业广西（阳朔）商品采购会，旅游带动了当地阳朔特色农业的发展，而在此基础上阳朔现代农业的发展也值得关注。

6.7.2 手工制作产业类型多样化

在调研统计中，根据游客的密集程度将商业街道分为三个不同的区域：A、B、C 区域，其中 A 区域为旅游中心商业区，是游客最为密集的区域，包括新西街、西街、神山路、蟠桃路、桂花路、府

前路、芙蓉路、叠翠路、城中路、城北路、滨江路、碧莲巷、宝泉路共 13 条街道；B 区域是旅游区与居民区的过渡区域，游客量较少，包括城西路、福源路、响水路、武藤巷、荆凤路、龙岳路、将军路、画山路、兰花路 9 条街道；C 区域属于居民区，游客量最少，包括了武警路、石马路、桑园路、东街、鸣凤路、进士路、抗战路、观莲路 8 条街道。

本次监测共涉及阳朔商铺 2770 间，其中旅游纪念品商铺为 246 家，占总数的 8.88%，主要包括手工艺品及特色农产品。阳朔的特色手工艺品主要有竹木雕、竹凉席、书画作品、画扇、大理石和滑石制品、山水盘景、石玩制品、民族刺绣、首饰、五彩绣球、文化衫、仿古陶瓷等，手工制作产业类型多样化。县城内零售手工艺品的摊、店、点主要集中于游客来往较为频繁的西街、城中路、蟠桃路、新西街一带，图 6-7、6-8 和 6-9 分表显示了区域 A、B 和 C 之内旅游纪念品商铺的街道分布具体数量。纪念品商铺的总体比例和去年相比有轻微的上升，同时在游客高度聚集的区域如西街、滨江路，还出现了新的旅游纪念品类型如风味辣椒酱、各种糖和酥等等，这说明阳朔的手工艺品在旅游发展的带动下取得进一步的发展，继续为居民提供了良好的从业选择，也会在一定程度上有利于当地传统手工艺技术的传承和发展。但是在实地调研的过程中也发现，阳朔旅游纪念商品的同质化严重，而且新增的旅游纪念品类型和阳朔本地特色的关联度很弱，这一方面反映了阳朔旅游商业化程度很高，也在另一方面也反映了旅游几年商铺间竞争日渐激烈、外来文化对当地特色的冲击十分严重。

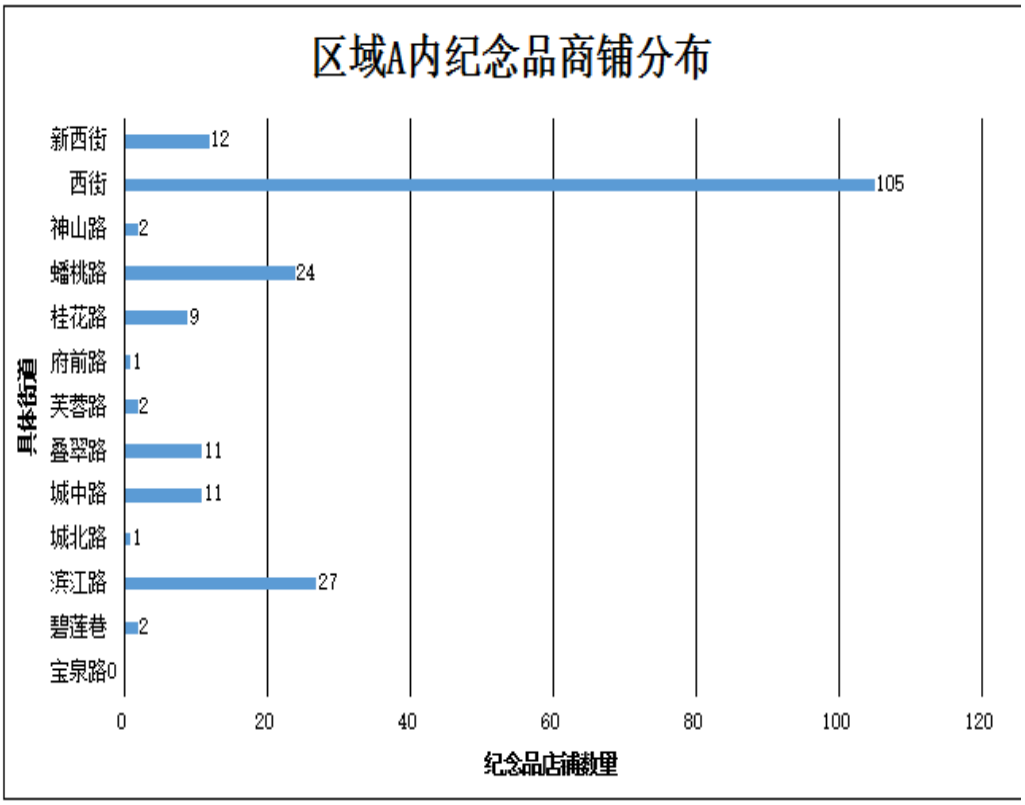


图 6-7 区域 A 内纪念品商铺分布

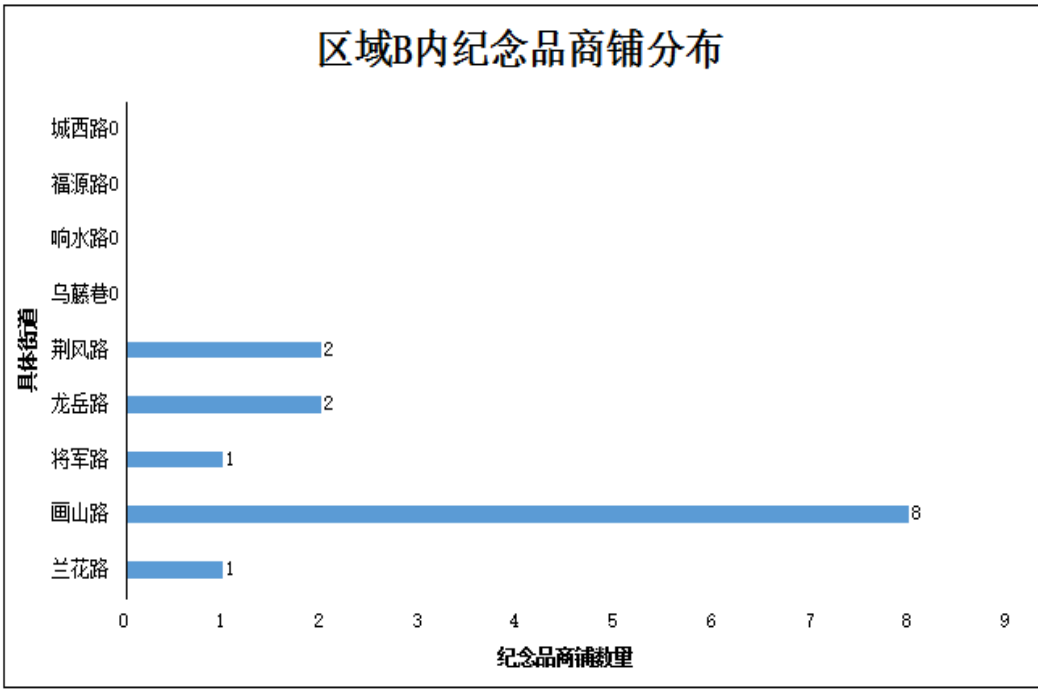


图 6-8 区域 B 内纪念品商铺分布

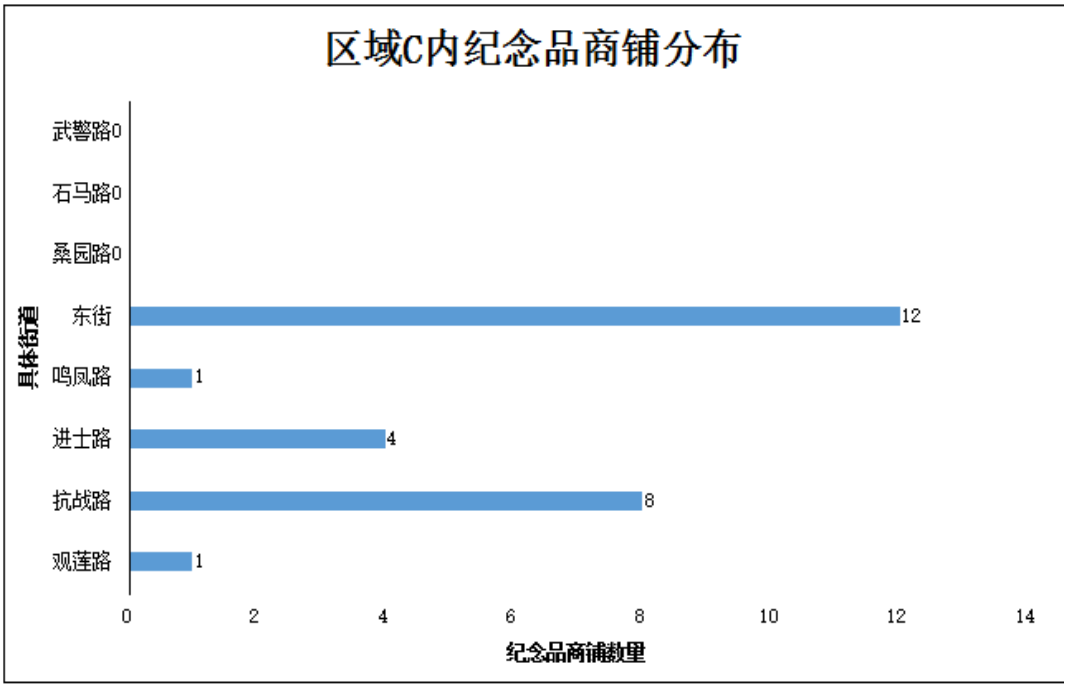


图 6-9 区域 C 内纪念品商铺分布

6.8 旅游对阳朔商业发展的影响

6.8.1 总体影响分析：旅游店铺比重大，企业间竞争加剧，店铺同质化明显

本次监测共对阳朔 30 条主要街道进行了商铺统计，比去年增加了 3 条。共统计商铺 2770 家，与 2013 年相比多出 299 家，店铺数量上升较为明显，这一方面是由于统计街道数量的上升，但也表明阳朔商铺数量发生了明显的上升。

表 6-4 阳朔店铺类型数量变化

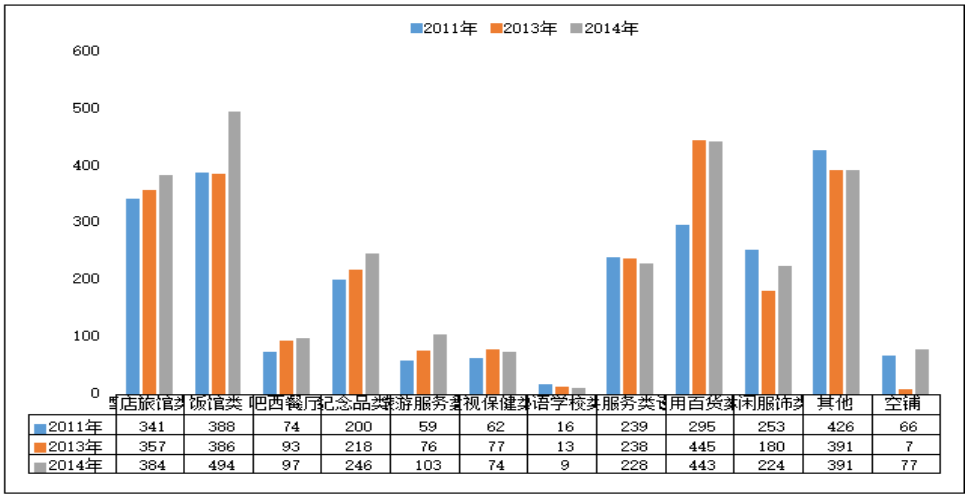
店铺类型	2013 年数量	2013 年比例	2014 年数量	2014 年比例
酒店旅馆类	357	14.45%	384	13.86%
饭馆类	386	15.62%	494	17.83%
酒吧西餐厅类	93	3.76%	97	3.50%
纪念品类	218	8.82%	246	8.88%
旅游服务类	76	3.08%	103	3.72%
中式保健类	77	3.12%	74	2.67%
外语学校类	13	0.53%	9	0.32%
公共服务类设施	228	9.23%	228	8.23%
日用百货类	445	18.01%	443	15.99%
休闲服饰类	180	7.28%	224	8.09%
其他	391	15.82%	391	14.12%
空铺	7	0.28%	77	2.78%
总计	2471	100%	2770	100%

近两年阳朔游客总数不断上升的情况表明，旅游对阳朔的商业发展仍具有主导性作用，对店铺的增长呈现出一个正向的带动作用。另外，一方面，与旅游密切相关的店铺类型包括饭馆类、纪念品类、旅游服务类店铺比重均有所上升，而面向居民的日用百货类、公共服务设施类则相应减少，这说明随

着阳朔旅游业的发展，新的旅游相关企业在不断进驻，旅游相关商铺面临的竞争加剧。另一方面，从店铺数量增加以及酒店旅馆类、酒吧西餐厅类店铺比重下降来看，随着阳朔境内旅游相关商铺竞争加剧，商铺在不断地根据游客旅游需要进行结构性调整。

结合实地调查结果和 2013、2014 两年店铺统计数据的对比差异发现，旅游商铺的同质化除了在所出售的商品和服务有所体现之外，还体现在商铺名称的更迭上。如在抗战路某段桂林米粉店密集区域，今年的数据显示虽然其经营内容与去年一致，但是其店名则有所改变，而且均统一改为“xxx 百年正宗桂林米粉”的格式，这说明在竞争日渐激烈的情况下，店铺的名称上同质化的情况也正在变得明显。

今年所调查的空铺数量与去年相比有明显的增加。监测小组在调研发现，许多空铺是由于建筑的装修、改建所造成的，而新建成的店铺与原来店铺相比面积更大，不少分布在城市主干道（抗战路）。这种现象的出现，除了城市规划的影响之外，也很有可能是由于规模更大、实力更强的旅游商铺进驻，这也将预示着阳朔旅游商业化程度进一步增加，需要以后相应的监测结果进行检验。



	酒店旅馆类	饭馆类	吧西餐厅类	纪念品类	旅游服务类	视保健类	语学校类	服务类	用百货类	闲服饰类	其他	空铺
2011年	341	388	74	200	59	62	16	239	295	253	426	66
2013年	357	386	93	218	76	77	13	238	445	180	391	7
2014年	384	494	97	246	103	74	9	228	443	224	391	77

图 6-10 阳朔县 2011、2013 和 2014 年的店铺类型比较

6.8.2 旅游影响下的商业业态变化

6.8.2.1 店铺使用功能：旅游商铺比例结构调整，面向居民商铺比例上升

通过观察 2011 年、2013 年和 2014 年三年的商铺数据对比，可以清晰地看出面向居民的店铺比重呈现出一个先降后升的过程。

为了更好地了解对店铺的使用功能的变化，此处调研统计时借鉴国内学者保继刚、苏晓波对旅游商业化的影响，根据商品面向的群体，将商铺的使用功能划分为这三类：面向旅游者、面向游客及居民、面向居民。根据 2013 年和 2011 年的调研统计数据可知得到以下的对比图 6-11。

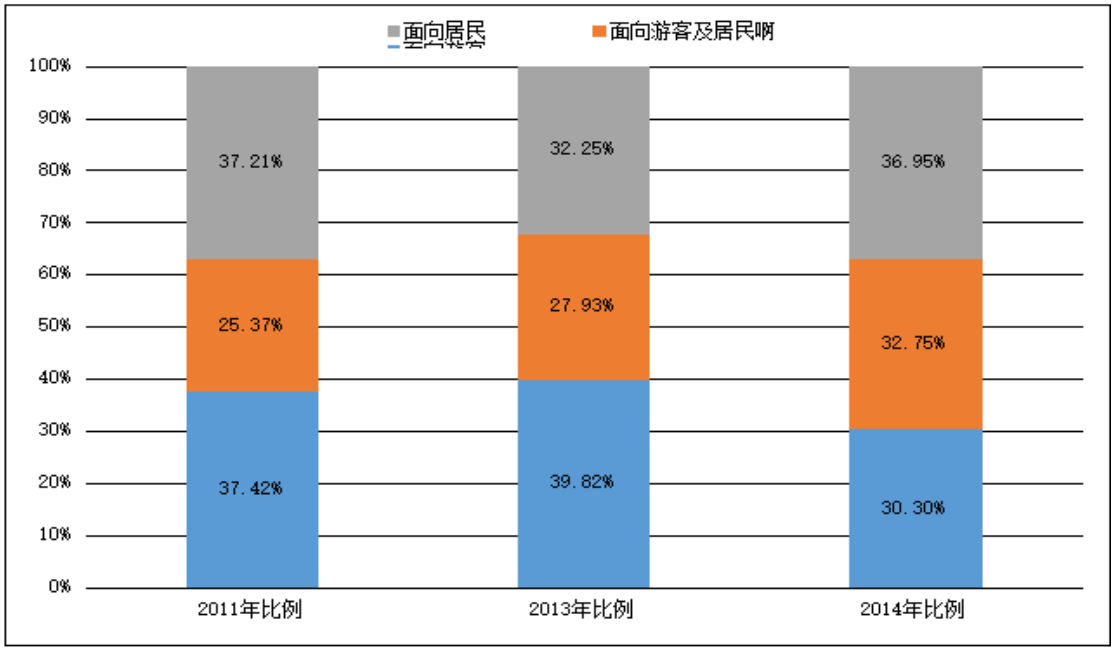


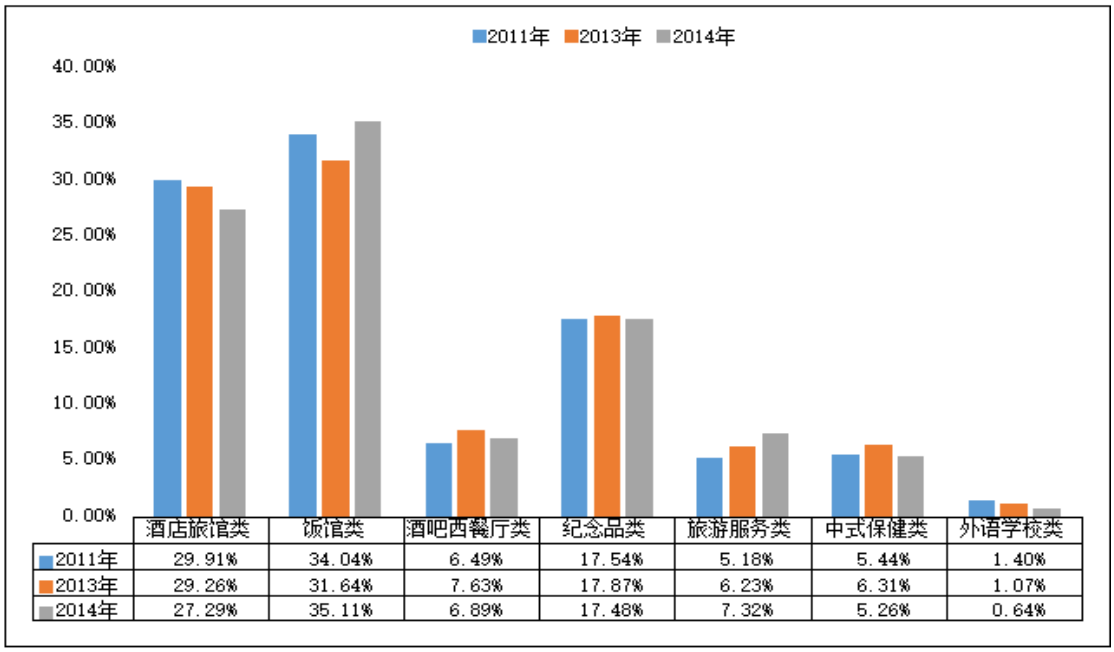
图 6-11　2013 年、2011 年与 2014 年不同使用功能店铺的比例对比

从 6-11 可以看出，相对于 2013 年，面向居民的商铺比例从 32.55%上升到 36.95%，面向居民与游客的比例从 27.93%上升到 32.75%，但是纯粹面向游客的商铺比例则从 39.82%下降到 30.30%，从总体来看，跟游客相关的商铺总和与 2013 年相比有所下降，2011 年至 2013 年该类店铺总和的比例上升可以归因于阳朔日益加大的旅游影响大力推动了阳朔旅游店铺从服务于居民到服务于游客的变化。而 2014 年纯粹面对游客的店铺比例下降较大的情况则可能是在剧烈的旅游商业竞争条件下，阳朔县城的商铺进行自我结构调整的结果，一部分原本单纯面向游客的店铺变为面向居民的商铺或者转变为同时面向游客和居民的商铺。

6.8.2.2 旅游店铺经营类型：饭馆类和旅游服务类增加明显

商铺的功能在进行结构性调整的同时，与旅游密切相关的店铺的具体使用也呈现出不同的变化。

根据旅游店铺的经营内容，此次调研统计将与旅游密切相关的店铺划分为以下 6 类：酒店旅馆类、饭馆类、酒吧类、西餐厅类、旅游纪念品类（手工艺品、特色服饰、土特产等）、旅游咨询服务类（如旅行社、自行车租赁店铺等）。结合 2011 年的统计数据，可得以下店铺类型的比例变化图 6-12。（其中为了方便与上年数据进行对比分析，仍然将酒吧和西餐厅类一并统计）



	酒店旅馆类	饭馆类	酒吧西餐厅类	纪念品类	旅游服务类	中式保健类	外语学校类
2011年	29.91%	34.04%	6.49%	17.54%	5.18%	5.44%	1.40%
2013年	29.26%	31.64%	7.63%	17.87%	6.23%	6.31%	1.07%
2014年	27.29%	35.11%	6.89%	17.48%	7.32%	5.26%	0.64%

图 6-12 2013、2014 年和 2011 年各区域各店铺类型所占比例的对比

在与旅游者密切相关的 6 类店铺当中，除了饭馆类和旅游服务类之外，其他 4 类均与 2013 年相比呈现出小幅度的下降。但是酒店旅馆类、饭馆类、纪念品类仍然为最主要的旅游商业店铺类型，这说明旅游者所需服务总体上和之前保持一致，但是在具体的服务类型上仍然有一些结构调整。饭馆类店铺的上升可能一方面可能是由于阳朔游客总量的上升导致的，而另一方面对比 2013 年其所占比重的下降较大，2014 年的回升是对其 2013 年比重下降、市场压力缓和下的一种反弹。而旅游服务类店铺的增加则可能是由于阳朔散客数量较多所引致。酒店旅馆类和饭馆类都是游客在外旅游需求比较硬性的服务，饭馆类店铺的上升而酒店旅馆类的比重却在下降，对比阳朔 2014 年上半年度游客总量同期对比表现较好的情况来看，无法直接从其所占比例来直接判断。2014 年酒店旅馆类商铺比 2013 年仍小幅增长 27 家，酒吧西餐厅类也小幅增长 5 加，这两类商铺均已趋于饱和，由于今年所调查街道的增加和调查涉及总店铺数量的大幅增加，因此酒店旅馆类比重相对而言产生了小幅的下降。纪念品类、中式保健类和外语学校类则可能由于内部企业竞争激烈而导致部分商家退出市场所致。总体而言，旅游商铺功能结构的变化在一定程度上反映了阳朔游客需求的变化和阳朔旅游形态的变化。

6.8.2.3 店铺所处区域：旅游商铺进一步向旅游中心区集中

在调研统计中，根据游客的密集程度将商业街道分为三个不同的区域：A、B、C 区域（A、B 和 C 区域各自所包含路段已在前节说明），根据三个区域的店铺统计结果，结合近几年年的监测数据，可得到图 6-13。

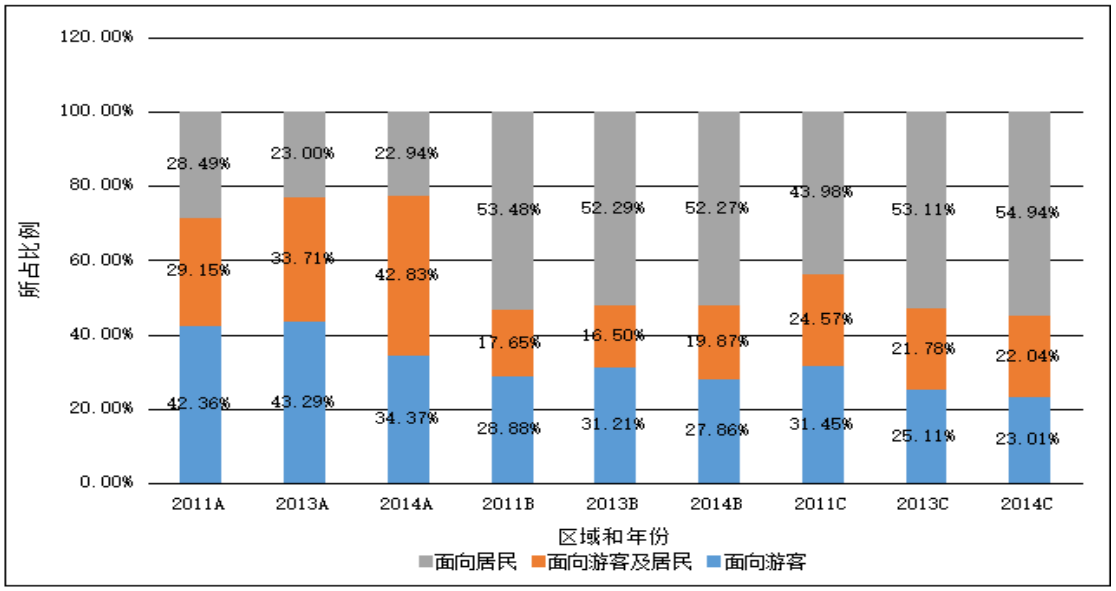


图 6-13　2013、2014 年和 2011 年各区域各店铺类型所占比例的对比

从图 6-13 可以看出，A 区域作为旅游核心地带，其面向游客和面向游客及居民的店铺比例总和从 2011 年到 2014 年均呈现出上升趋势，说明 A 区域作为旅游核心地带的总体旅游商业化水平仍然处在上升状态。而 B 区域则在 2013 年在 2011 年的基础上有所上升，但 2014 年和 2013 年总体情况持平，而且单纯面向游客的店铺比例有所下降。C 区域则从 2011 年至 2014 年面对游客和面对游客及居民的店铺比例总和均呈下降趋势。这种商业态的变化现象与游客的游览路径和活动区域相关，由此可见，从 2011 至 2014 年间，旅游核心区域对于游客的吸引力仍然在逐步增加，但是相对外围的 B 区域和 C 区域并没有显著增强其对游客的吸引力，并且有更加面向居民的趋势。

6.8.3 小企业主的社会行为心理表现分析

本次监测共回收了企业业主的有效问卷 80 份。主要统计指标包括企业概况、业主的经营感知、对当地感知、节能意识与行为、旅游可持续发展的认知五个方面。

6.8.3.1 企业概况：经营多元化，生活方式型企业较为普遍

在所调查的样本中，面向游客的企业占 72.7%，面向居民的企业占 10.4%，还有 16.9%的企业同时面向游客和居民。2001 年前开业，在这些企业中，涉及住宿服务的占 43.9%，涉及餐饮服务的占 25.8%，涉及商品销售的占 18.2%，还包括一些涉及租赁、娱乐等服务的企业。其中，有 39.4%的企业同时提供多种旅游服务，实现了多元化的经营。在经营动机方面，大部分业主（68.7%）选择来阳朔的原因都不是为了谋生，接近半数的业主（49.3%）是因为喜欢阳朔的环境，开店的目的是为了追求一种生活方式，还有部分业主是出于自身爱好、家人等原因来到此地。

6.8.3.2 经营感知：经营现状有所改善，租金与游客消费能力是最重要影响因素

整体上来说，阳朔的企业业主对企业经营现状评分的平均值为 2.76（1 代表非常好，2 代表比较好，3 代表一般，4 代表比较差，5 代表非常差），比一般水平稍好。其中，58.9%的业主认为其经营状况一般，26.3%的业主认为其经营状况比较好，10%的业主对其经营现状感到不满意。与去年相比，不满意的幅度（去年不满意的业主占 65.79%）大大降低，这说明阳朔的企业经营现状得到一定程度的改善。

问卷通过对“租金”、“雇工工资”、“货物成本”、“其他企业的竞争”、“游客消费能力”、“税收”、“政策”几个指标的调查发现（结果如图 6-14），游客消费能力、租金、其他企业竞争、政策是对企业经营影响较大的因素。其中，游客消费能力与租金成为最重要的影响因素。实地调查中了解到，西街上的店铺年租金高达 40-50 万元，而西街附近的街道上，店铺年租金也达到十多万元，不少企业主都抱怨难以承受繁重的租金。这些因素使得阳朔企业的经营稳定性较低，导致企业的存活周期较短。在所调查企业业主中，平均经营时长为 4.2 年，不足一半（47.7%）的企业经营时间超过 3 年，其余均在 1.5 年左右。这些不稳定性加大了业主开店的风险，高店租问题将会影响阳朔旅游业今后的良性发展。

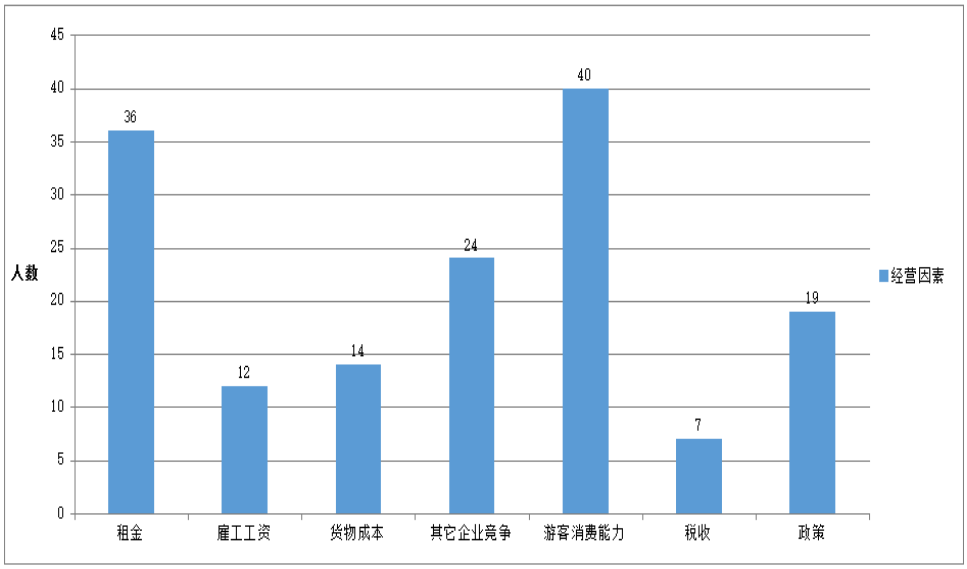


图 6-14 业主认为影响经营现状的因素情况

与去年相比，游客消费能力成为影响企业经营状况的最重要因素。阳朔县游客人均日消费从 2010 年的 388 元增加到 516 元，但是物价也在逐年上涨，游客的消费能力并没有本质上的大幅度提高。阳朔的团队游客人数不断增加，并且财力受限的学生群体也是阳朔旅游市场的重要组成部分。另外，企业之间恶性的低价竞争也导致旅游服务品质降低，高端游客市场开发不足。因此，企业如何摆脱低价

竞争的恶性循环、通过提供高质量与个性化服务来吸引高端游客市场，成为阳朔旅游业在今后的转型中亟需考虑的问题。

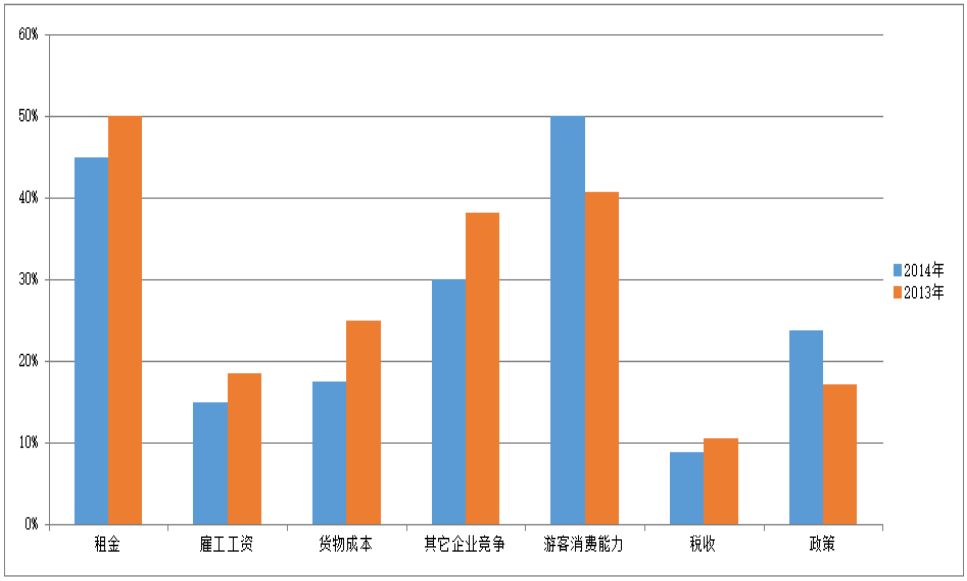


图 6-15　业主认为影响经营现状的因素：2014 年与 2013 年对比

6.8.3.3 环境感知：普遍满意居住与投资环境，但认为西街商业化严重

在业主对当地感知的调查方面，问卷主要采用了“安全”、“宜居”、“值得投资”、“休闲活动”、“西街商业化”和“西街吸引力”6 个指标。从统计结果看，业主对“安全”、“宜居”、“值得投资”、“休闲活动”的平均满意度均接近 4，尤其是对“宜居”一项显示出 4.3 的高满意水平。这体现了业主对阳朔整体生活投资环境普遍感到满意。但是在对西街的感知上，大部分业主都认为西街的商业化程度太高，对游客的吸引力减弱。其中，有 68.4%的业主同意西街太过于商业化，有 50%的业主同意西街对游客吸引力有所下降。

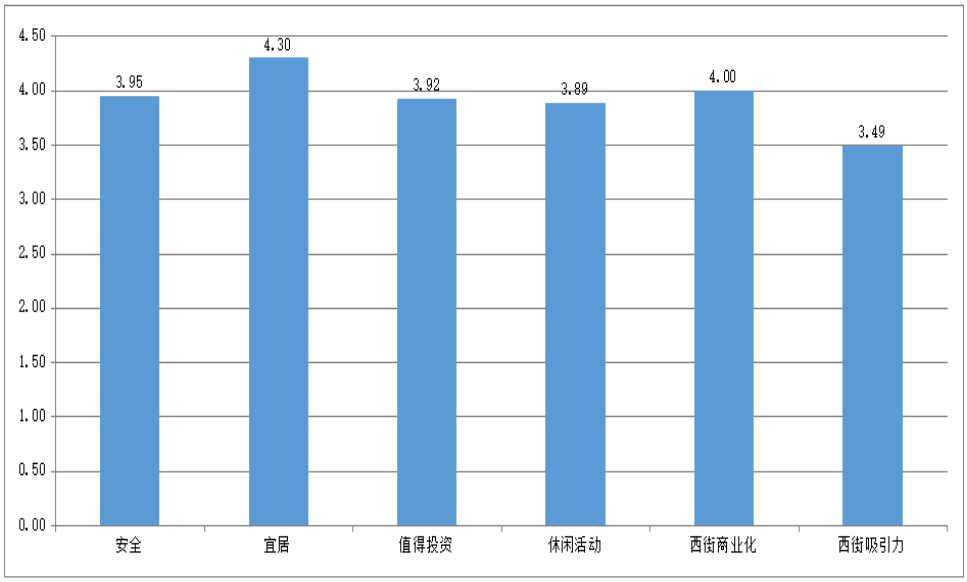


图 6-16　　阳朔业主对当地的感知情况

6.8.3.4 节能方面：节能意识有所提升，但实际行动仍然不足

在对业主样本关于“是否采用节电节水”的问题调查上，仅 32%的业主有采取节能措施，包括客栈旅馆、餐厅餐馆、酒店等类型的企业，店铺类型与去年相比增加。同时，与去年相比，没有采用节能措施意愿的业主比例有所下降，这表明当前阳朔企业的节能意识有所提升，但在节能行为的采用方面比例依然很小，节能行为仍然不够普遍化。

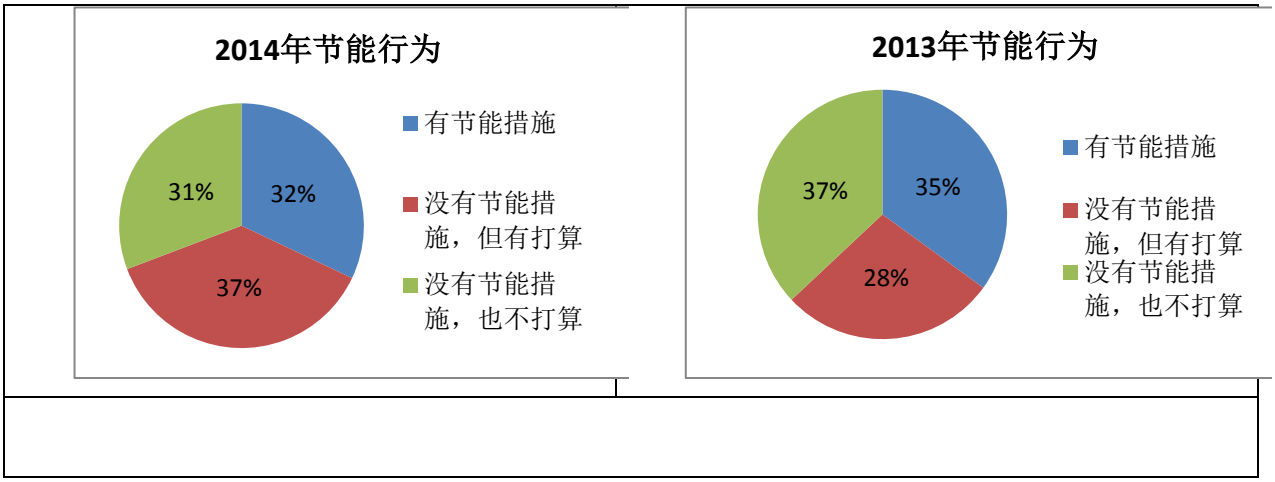


图 6-17　　阳朔业主在节能上的行为选择情况：2014 年与 2013 年对比

6.8.3.5 业主对可持续旅游发展的认知需要提升

在对业主样本关于“是否了解什么是旅游可持续发展”的问题调查上，大部分业主表示对旅游可持续发展“稍稍了解”，仅有 12%的业主表示“非常了解”，这说明阳朔业主对旅游可持续发展的认知仍然有待提升。另外，在对旅游可持续发展概念的了解上，大众媒体和政府宣传是主要渠道，尤其是大众媒体体现示出了最为重要的作用。所以，未来依然要政府和大众媒体的宣传入手，提高旅游可持续发展的宣传力度，从而加强公众对旅游可持续发展的认知。

图 6-18 业主对旅游可持续发展的认知及业主了解旅游可持续发展的渠道

6.8.4 小企业员工的社会行为心理表现分析

本次监测共回收了企业员工的有效问卷 179 份。主要统计指标包括工作满意度、职业选择、工作能力与学习三个方面。

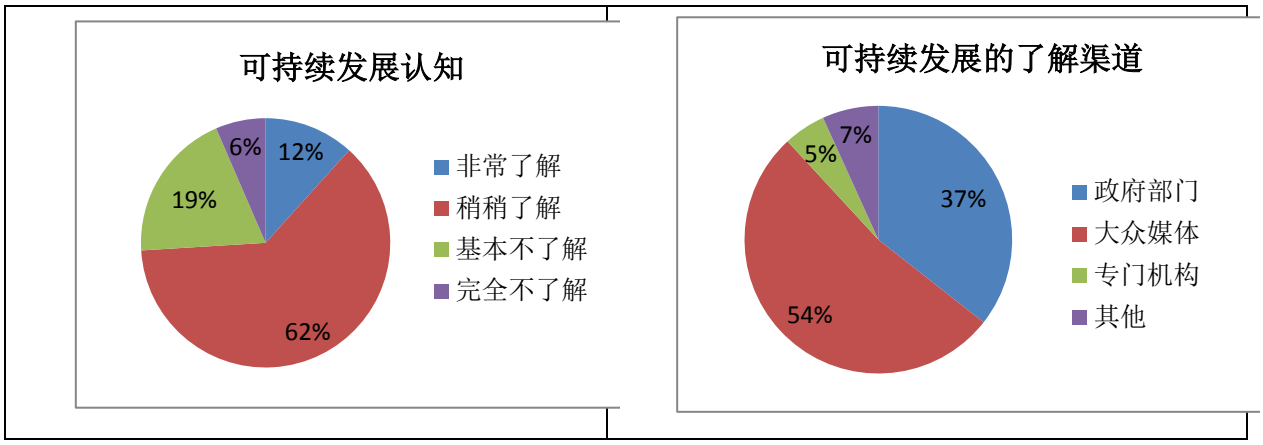


图 6-18 业主对旅游可持续发展的认知及业主了解旅游可持续发展的渠道

6.8.4.1 工作满意度：整体满意度较高，但工作待遇有待提高

根据数据分析结果，员工对目前工作的平均满意度得分为 3.87，高于中立水平 3，接近满意水平 4，68%的员工表示对目前工作比较满意。整体来说，员工对其工作的满意度较高，特别是对景区环境最为满意，但工作待遇仍有待提高。

具体而言，在此次监测中，对员工工作满意度的测量体现在问卷中“工资水平”、“奖金”、“休假”、“晋升空间”、“上级评价”、“上级帮助”、“同事配合”、“同事交流”、“家人支持”、“规章制度”、“部门职责”、“经营状况”、“发展目标”、“舒适度”和“景区环境”这 15 项监测指标上。这些指标又可归为对员工关于工作待遇、工作的人际关系、对企业的认知与认同状况、工作环境四个影响维度的满意度调查。统计数据如表 6-5，员工对工作环境最为满意，对工作上的人际关系、对企业的认知状况也较为满意，而对工作待遇的满意度最低。

表 6-5 员工工作满意度中各细化因素的平均满意度

影响维度	监测指标	平均满意度水平	
工作待遇	工资水平	3.28	3.28
	奖金	3.22	
	休假	3.33	
	晋升	3.29	
人际关系	上级评价	3.77	3.61
	上级帮助	2.97	
	同事配合	3.07	
	同事交流	4.17	

	家人支持	4.09	
企业认知	规章制度	3.65	3.69
	部门职责	3.89	
	经营状况	3.61	
	发展目标	3.6	
工作环境	舒适度	3.72	3.96
	景区环境	4.19	

工作待遇方面，员工在工资、奖金、休假、晋升上都表现出相对较低的满意度。其中，根据调查结果，阳朔旅游企业员工的工资水平大多数（65.5%）只在 1001~2000 元范围内（如图 6-20），与去年情况基本相同。这些符合了旅游企业普遍的低工资水平、旅游旺季休假少、企业组织呈严密的金字塔架构的特点。人际关系方面，员工对同事间交流的满意度最高，这说明阳朔大部分的旅游企业有着融洽和睦的氛围，同时也与旅游服务工作对交流合作的较高要求有关。另外，大部分员工的工作都获得了家人的支持，这也说明阳朔的旅游发展受到了越来越多人的肯定。企业认知方面，各项指标得分接近。在实地调查中发现，部分员工对企业的规章制度、发展目标等情况并不是十分了解，这可能与员工较高的流动率有关。工作环境方面，员工对景区环境表现出最高的满意度。在实地调查中也发现，环境好成为吸引外地人前来阳朔工作的主要原因。

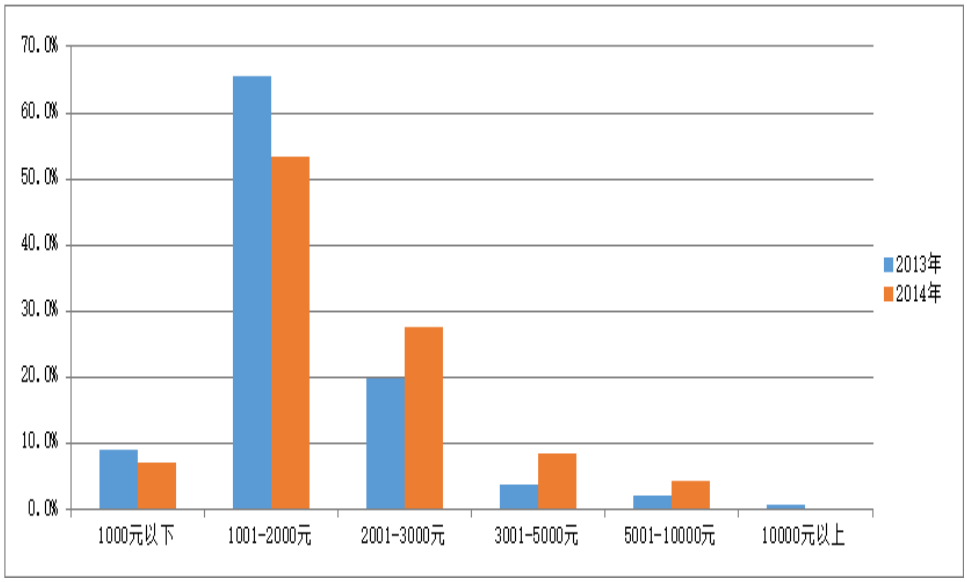


图 6-19 员工月收入水平：2014 年与 2013 年对比

6.8.4.2 职业选择：重在追求生活方式，转换工作意愿高

关于员工的职业选择态度及行为的评价指标体现在问卷中“选择工作的原因”、“符合的就业机会是否多”、“如何获取该工作”和“是否有转换工作的意愿”这四项上。在“工作原因”及就业动机方面，有45%的员工选择“喜欢阳朔舒适的环境，追求一种生活方式”，这符合了员工对工作环境满意度最高的调查。然而，员工虽然愿意接受低工薪来追求一种生活方式，但同时他们的流动性也非常高。在调研数据中显示，有 36.6%的员工有转换工作的意愿，并且大多打算在 1 年左右转换工作，这对于阳朔旅游业的整体服务水平的提高是相对不利的。这也表明旅游在给阳朔创造就业岗位的同时，也增加了从业人员的流动性，增加了整个社会从业的不稳定性。

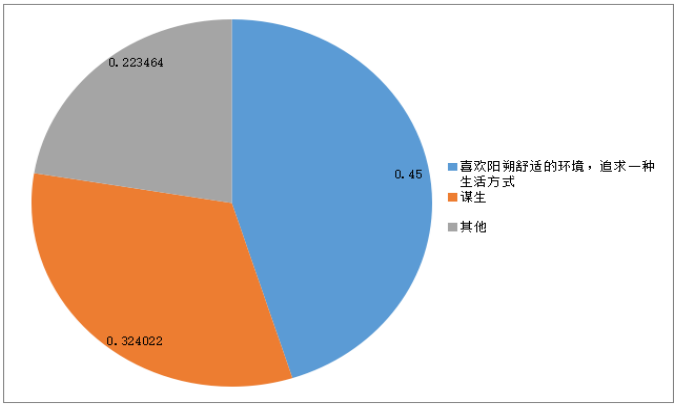


图 6-20 员工选择在阳朔工作的原因

在就业机会方面，46.8%的员工认为阳朔能提供给自己的就业机会不多，并且 99.4%的都表示是通过自己寻找或亲友介绍来获取工作机会的，社区和政府在这方面提供的帮助几乎没有。与去年相比，情况并没有得到改善。因此，政府及公共服务组织有必要落实相关措施，加大对就业信息提供渠道的扩宽，以提高就业率。

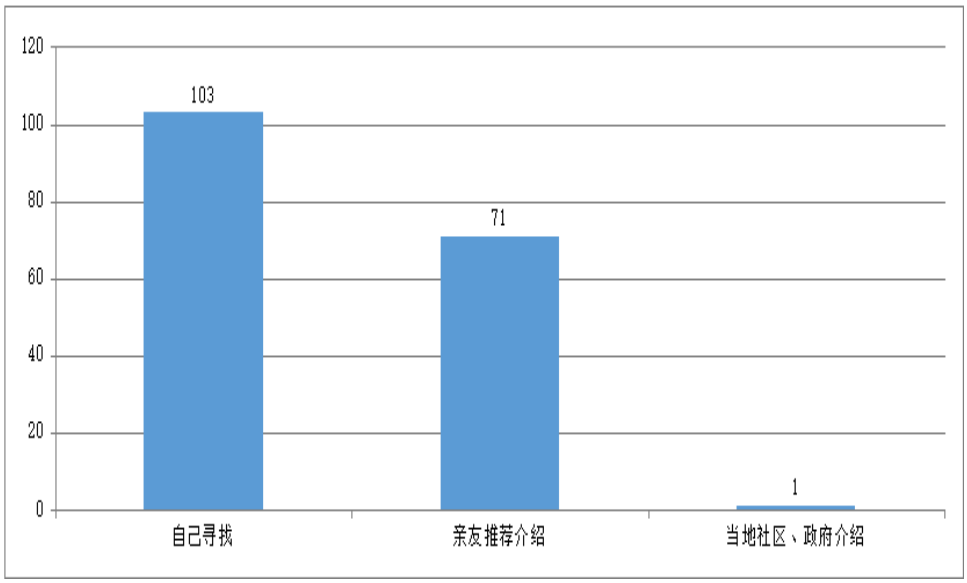


图 6-21 员工的工作获取渠道

6.8.4.3 工作能力与学习：英语学习能力较高，其他行业从业能力有限

在所调查的员工样本中，男女比例为 1：2.52，年龄基本处于 15-44 岁之间，受教育程度大都在高中及以上，其中本科及以上的占 28.8%。大多数（79%）员工没有其他收入来源，小部分员工通过从事导游、旅游商品销售等兼职来获得额外收入。家庭收入贡献率低于 50%的员工占 72.9%，同时，也有 17.7%的员工负担了家庭的全部经济收入来源。总的来说，阳朔的企业员工偏向年轻化，女性占多数，并且大都不是家庭的主要经济支柱，中等教育程度的较多，部分员工接受过高等教育。

表 6-6 员工的人口统计学特征情况

年龄	受文化程度
15-24 岁 **42.4%**	小学 5.1%
25-44 岁 **53.7%**	初中 16.5%
45-64 岁 **3.9%**	高中或中专 50%
65 岁及以上 **0**	本科或大专 26.1%
	硕士及以上 2.3%

通过以上分析可知，大部分员工为女性并且为中等教育程度，从业能力受到一定限制。而旅游业的就业门槛较低，对学历要求不高，为这部分人群提供了更多的从业机会。另外，由于阳朔的四处洋溢着中西结合的文化氛围，外国游客较多，于是英语交流成为了旅游从业者必不可少的工作技能。所调查的员工中，45.7%的员工有主动学习英语的习惯，40%的员工能够用英语进行基本交流，仅有 20.9%的员工完全不懂英语。对于传统上以农业为基础的西南地区的小县城而言，阳朔企业员工的英语能力水平已经算是很高，而这在很大程度上是受到阳朔旅游业的影响。

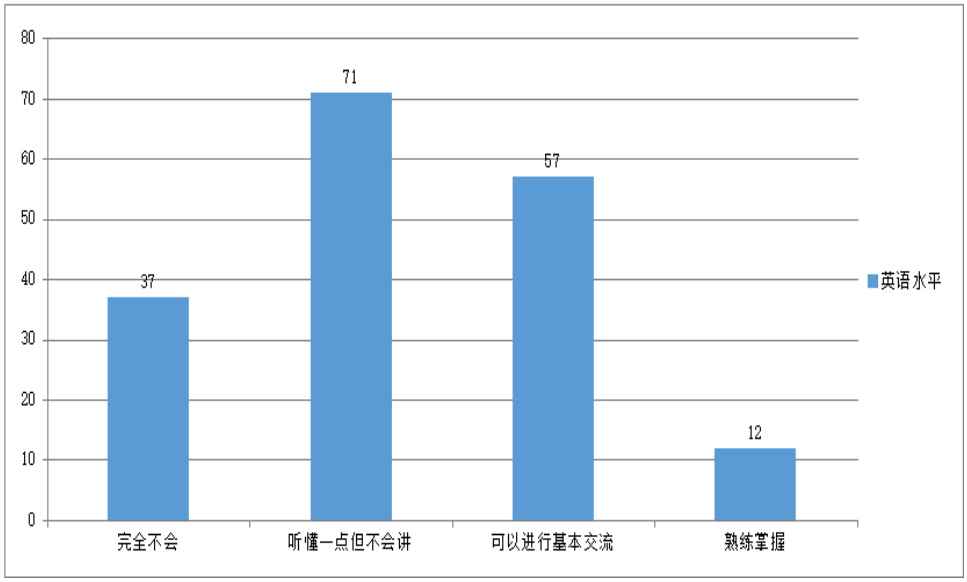


图 6-22 员工的英语水平情况

6.9 本章小结

6.9.1 旅游业有力地促进了阳朔整体经济发展

旅游业在阳朔的经济发展中有着极其重要的地位，积极地促进了阳朔社会经济的全面发展。集中体现在旅游的经济创收大；对财政贡献逐年增加；带动了农业、商业、手工艺等相关产业的发展；为当地居民创造了就业培训和就业机会；并且促进了当地的招商引资。

6.9.2 旅游对投资的拉动继续增强

2013 年，阳朔县稳步推进“广西特色旅游名县”建设，立足高端旅游精品项目建设，进一步加强旅游项目招商引资，新签亿元以上项目 4 个，内资到位 15 亿元，外资到位 3100 万美元，引进了“罗兰夏朵”、“弘尚圣景旅游健康产业项目”、“新加坡瑞胜休闲大世界”等一批新型高端旅游项目，招商引资

指标创历史最好水平。2014 年上半年，阳朔县新增重大旅游投资项目 5 个，继续投资项目 5 个，这体现了旅游业发挥出来的巨大的投资拉动作用在继续增强。

6.9.3 旅游对阳朔产业带动与结构调整作用明显

大规模的旅游发展，凸显了产业的带动效应。旅游的发展继续调整了阳朔县三大产的比例，对第二产业的带动尤为明显，使得第二产业从 2008 年到 2013 年期间增长了五个百分比，同时也降低了第一产业的比例。

阳朔作为一个农业县，丰富的农产品在旅游特产的发展上发挥了重要作用。另外，旅游业带来了大量的就业机会，也在一定程度上促进了就业人口从第一产业向第二产业和第三产业的转移。同时，旅游也促进了居民就业技能的提升，并且带动了相关教育和就业培训产业的发展。其中，旅游业对商业发展的促进尤其明显，旅游相关店铺与去年相比增量明显。

6.9.4 阳朔旅游商业进行结构性调整

从对比 2011 至 2014 年的商铺功能变化数据可以看出，在经过 2011—2013 年面向游客和面向游客及居民的商铺比例总和上升之后，2014 年有了明显的回落，这说明阳朔商业化在变化的旅游形势当中进行自我结构调整的过程；而且在与旅游者密切相关的 6 大类商铺当中，除了饭馆类和旅游服务类比例有所上升之外，其他均有小幅度降将，也反映了旅游商铺业态随着阳朔旅游形势和旅游者具体需求的变化进行调整的过程。

6.9.5 旅游小企业经营多元化：企业主与员工对其现状均较为满意

阳朔的旅游小企业经营方式比较多元化，生活方式型企业较为普遍。经营感知方面，小企业的经营现状有所改善，租金与游客消费能力是影响其经营最为重要的影响因素；环境感知方面，小企业主对阳朔的居住与投资环境普遍比较满意，但认为西街的商业化严重；节能方面，小企业主的节能意识有所提升，但实际行动仍然不足；另外，大部分小企业主对可持续旅游发展的认识都有所不足，需要进一步提升。而小企业的员工对其工作的整体满意度也较高，但认为工作待遇需要提高。由于旅游业的影响，他们的英语学习能力较高，重在追求生活方式，因为转换工作意愿也较高。

第 7 章　旅游与资源环境保护

7.1 旅游与资源环境保护监测指标

表 7-1 旅游与资源环境保护监测指标

主要监测方面	具体监测指标
大气环境	空气质量与达标情况
	居民与游客感知评价
水资源利用与水环境保护	水资源利用与保护
	居民与游客感知评价
噪音环境	噪音控制情况
	居民与游客感知评价
固体废弃物	固体废弃物处理情况
	居民与游客感知评价
旅游对景观及视觉影像	是否配合旅游发展进行景观与视觉改造控制
	居民与游客感知评价
能用管理	采取节能措施的企业比例与措施类型

7.2 大气环境

7.2.1 空气质量逐步平稳

阳朔县通过努力改善空气质量，发展循环经济，积极推进清洁生产，调整产业结构和能源结构，淘汰污染严重的企业，有效地削减了污染物排放量。阳朔大气环境质量逐步趋向平稳，并相对上一年有稍稍提升。根据《2013 年阳朔县环境状况公告》，阳朔县 2013 年环境空气质量中二氧化硫，二氧化氮，总悬浮颗粒物年均值符合国家二级城市标准。2013 年阳朔空气中二氧化硫、二氧化氮和可吸入颗粒物含量均相应下降，空气质量趋向平稳，可吸入颗粒物为主要污染因子（如表 7-2 所示）。

表 7-2 阳朔县 2013 年县城空气质量监测结果

项目	二氧化硫	二氧化氮	可吸入颗粒物

浓度	（SO_2）	（NO_2）	（PM_{10}）
年平均值	0.007	0.011	0.058
执行二级标准	0.060	0.040	0.100
是否达标	达标	达标	达标

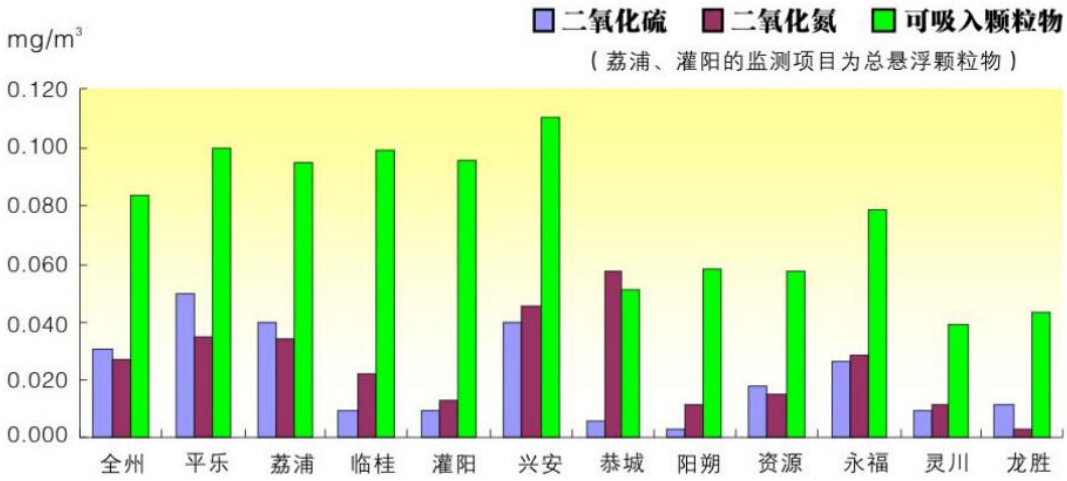


图 7-1 2013 年桂林市各县空气质量环境

（资料来源：《2013 桂林市环境状况公报》 ）

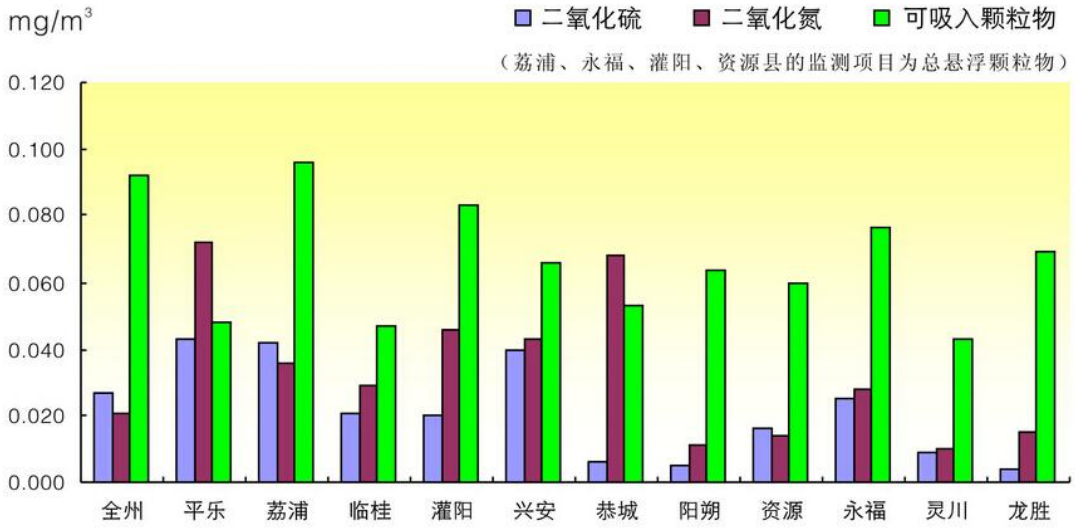


图 7-2 2012 年桂林市各县空气质量环境

（资料来源：《2012 桂林市环境状况公报》 ）

7.2.2 感知：居民感知提升，游客感知较好

居民对阳朔旅游发展空气污染感知情况如图所示，对于旅游使空气污染加重的认同度，被调查的居民中，占总数 17.3%的居民表示非常同意，41%的受访者表示同意，认为旅游对空气污染没什么影响的居民占 21.2%，而表示不同意及非常不同意的居民分别占被调查居民总数的 15%及 5.6%。

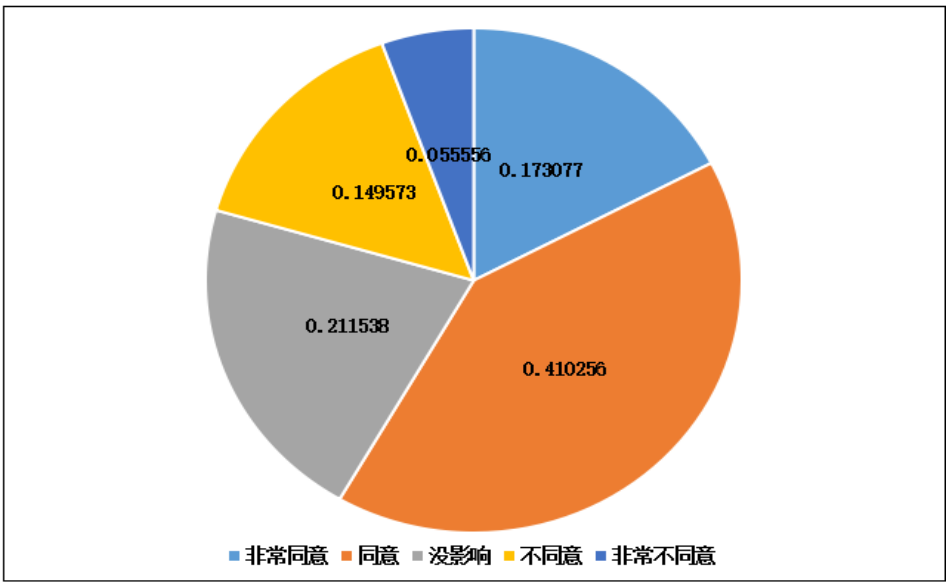


图 7-3 旅游使空气污染加重

从游客角度讲，如图 7-4 所示，对阳朔空气清净度的认知，被调查的国内、外游客对阳朔空气清净度的认知表示赞同及以上的占大多数，国内为 82.8%，国外较低为 77.4%。较大差异存在于“非常赞同”上。国内游客表示非常赞同的占 35.3%，而国外游客占 26.1%，这与游客本身长期生活的环境有关。表示中立的国内、外游客均等接近 14%。而表示不赞同及以下的游客，国内占 3.3%，国外占 8.8%。

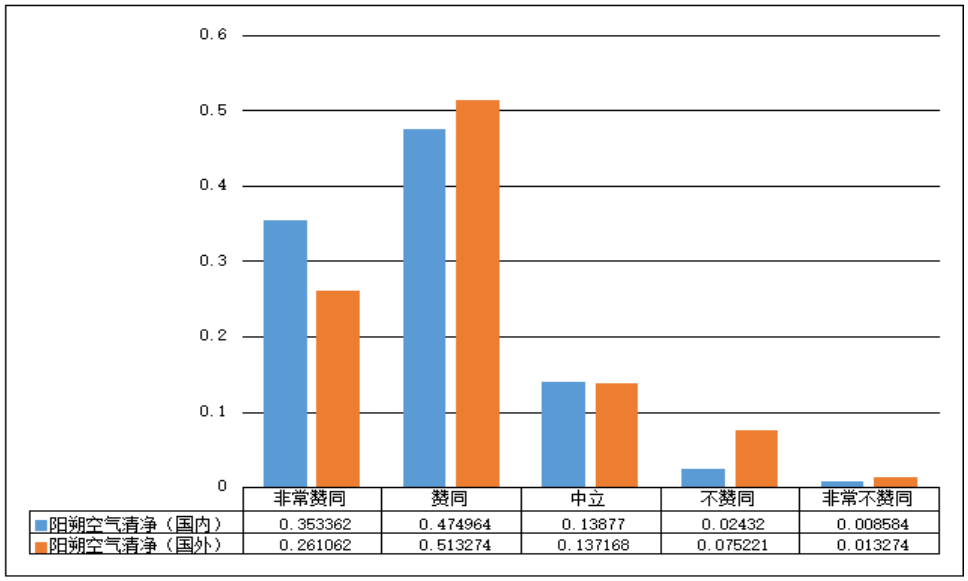


图 7-4 阳朔空气清净

总体而言，阳朔居民对与空气质量的感知较以往有一定的上升，同意“阳朔空气清净”的占 82.8%，说明阳朔县在处理空气污染上取得了一定的成绩。然而游客普遍赞同“阳朔的空气清净”，与居民的感知有一定的差距，这主要是由于居住在阳朔的居民对自己生活环境非常重视和在意，因此他们会对自己所处环境情况的变化较为敏感，而游客以自己居住的城市作为参照系来看阳朔，因而只能看到阳朔部分地区的情况，和自己所居住的城市做对比，因此在游客和居民的感知上会存在较大的差异。

7.3 水资源环境

7.3.1 水资源利用和保护

根据《2014 年阳朔县政府工作报告》抓好投资 3300 多万元的兴坪河整治工程、城区漓江左岸鳌头榨段及水文站段治理工程等项目建设；完成久大、顺梅、红旗等 9 座中小型水库除险加固；抓好中小河流治理和农田水利冬春修工作，提高农业防灾抗灾能力；在原有的基础上解决 1.5 万农村人口饮水困难问题。累计完成水利固定资产投资 1.03 亿元，完成渠道防渗 23.4 千米；完成农村饮水工程 62 处，解决 3.1 万农村人口饮水困难问题；完成冲水井、白面山等 16 座重点小（二）型病险水库除险加固主体建设。顺利实施 2013 年小农水专项县建设项目。中央小农水重点县建设项目顺利通过市级验收。

7.3.2 感知：居民感知水质变差，国内外游客感知不同

如图 7-5 所示，从居民的角度上看，18.4%的被调查者表示非常同意旅游的发展使当地的水体污染加重；而 44.3%的受访者同意这个观点。认为旅游对水体污染加重没有影响的居民占了 19.1%。不同意及非常不同意这个观点的居民受访者中分别占 13.9%及 4.3%。

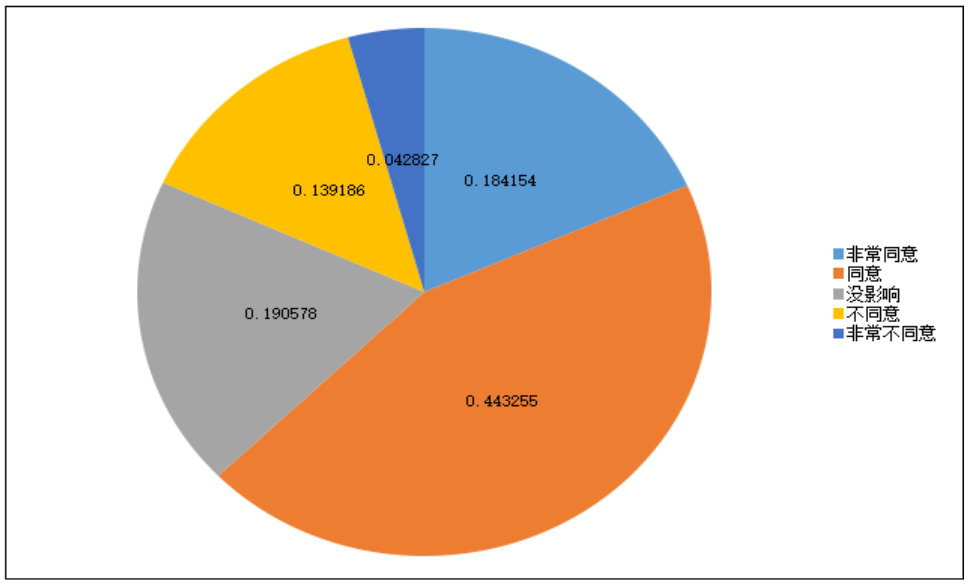


图 7-5 旅游使水体污染加重

从游客的角度上看，国内外游客对于漓江水质状况好这个问题感知不同。表示非常赞同的国内、国外游客分别占其总数的 20%与 9%；表示赞同的国内、外游客分别占 30%与 18%，可见国内外游客对水质的感知较往年有所下降。表示中立的国内、外游客分别是 36.5%与 46.2%；表示不赞同的国内、外游客分别是 11%与 19%；表示非常不赞同的国内游客占 2.6%，国外游客占 7.2%。

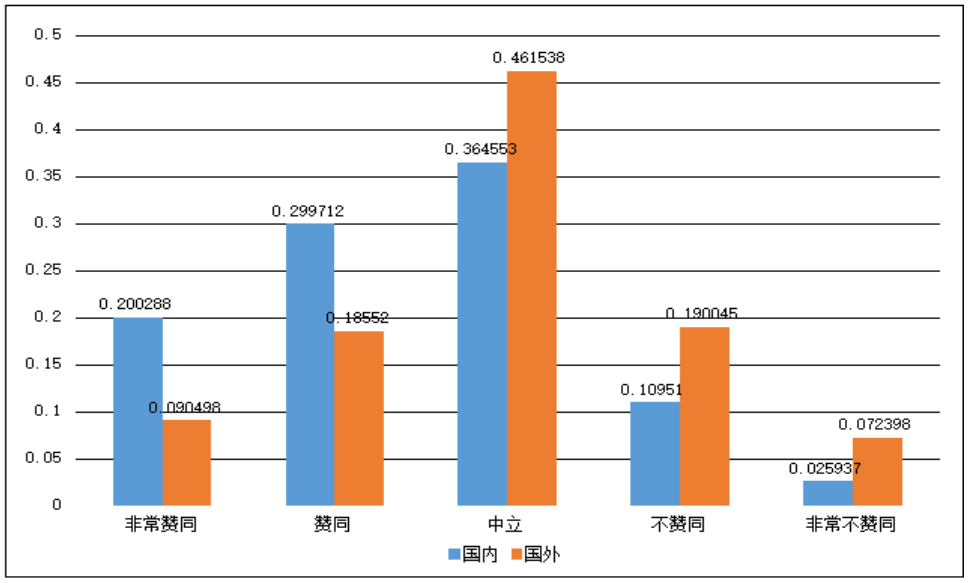


图 7-6 漓江水质状况好

总体来说居民感知水质变差，而游客感知水质状况较往年下降。国内外游客对漓江水质状况总体的感知分布相差较大，从图 7-5 与 7-6 可知，中国游客对水质的状况赞同比外国游客较高，外国游客在不赞同的选项中比中国游客要高，表明不同的地域环境对水质感知情况不同。同时也折射出现实中水质状况并不算良好，依然需要花力气去改善和维护。从居民角度上看，超过 50%的居民同意旅游使阳朔的水体污染加重，这个现象的原因与居民和游客对水体认识时间的长短有关。作为居民，长时间接触当地水体，因而对其变化感知比较明显，而游客对阳朔水体的变化相对了解较少，唯一的参照标准就是自身居住地的水体质量。

7.4 噪声环境

7.4.1 噪声环境现状

根据《2013 年阳朔县环境状况公告》，阳朔县城噪声达标区网格监测点位达标比例为 91.7%，统计情况见表 7-3。

表 7-3 阳朔县 2013 年噪声达标区监测达标情况

达标区名称	声源	生活（商业）		交通		工业	
阳朔县城（昼夜监测点位总数 206 个）		昼	夜	昼	夜	昼	夜
	总个数	92	92	11	11	0	0

	达标数	87	87	8	7	0	0
	超标数	5	5	3	4	0	0
	达标比例（%）			91.7			

7.4.2 感知：西街噪声污染严重

从居民的角度而言，受访者中 21.6%的居民对旅游使噪声污染加重表示非常赞同，47%的居民表示赞同。同时，有 16%的受访居民认为旅游对噪声没有影响。而不同意及非常不同意的居民分别占 13%与 2.4%。（图 7-7）

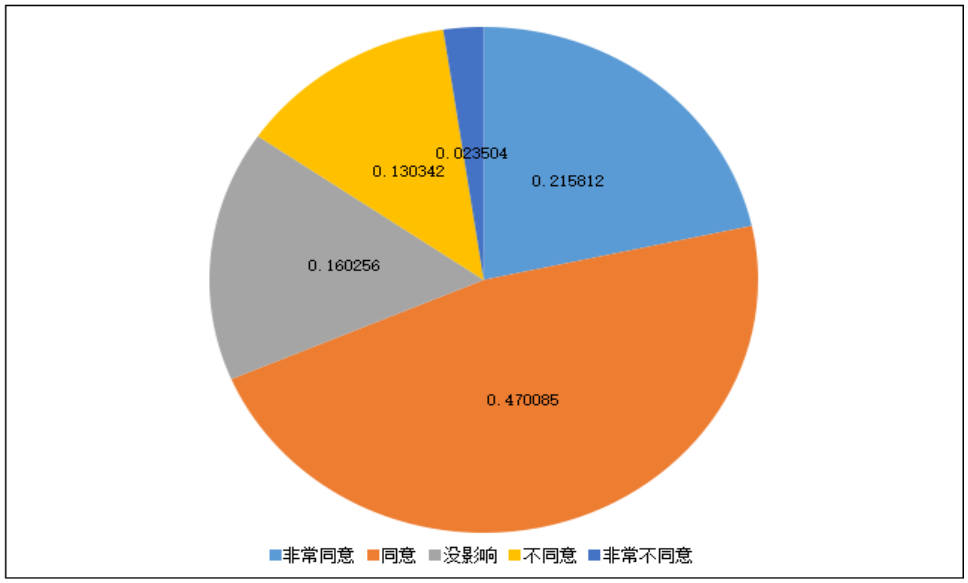


图 7-7 旅游使噪音污染加重

从游客的角度而言，17.4%的国内游客非常赞同“阳朔噪声小”这个观点，而 10.7%的受访国外游客表示非常赞同。但是，表示非常不赞同的国内游客为 11.8%，而国外游客占了 21.3%。表示赞同的国内游客占 34.1%，国外游客占 29.3%；表示中立的国内游客占 32.1%，国外游客占 26.7%；表示不赞同的国内游客占 4.6%，国外游客占 12%。

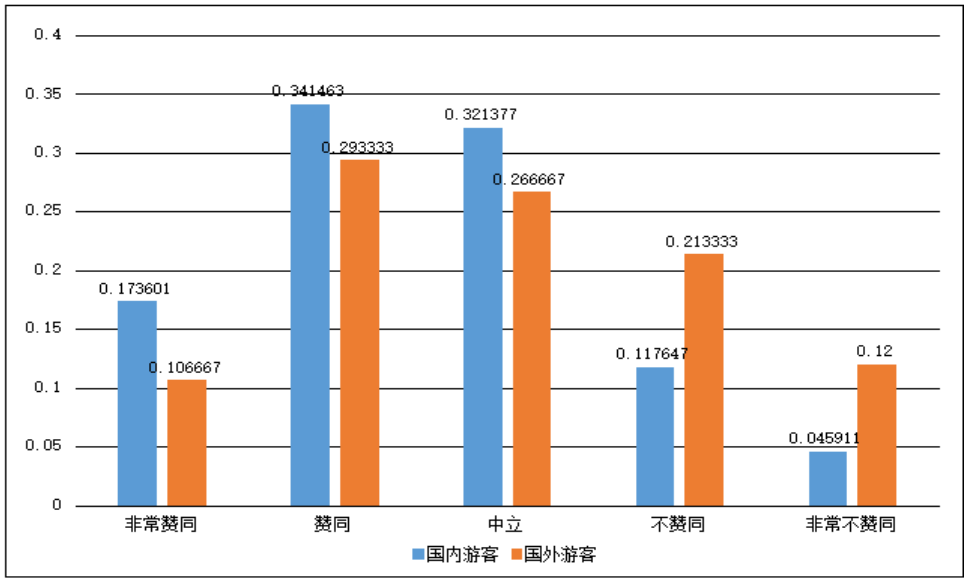


图 7-8 阳朔噪音小

总体而言，超过 60%的居民认为阳朔噪声严重，部分受访者认为旅游发展带来的噪声干扰了他们的生活，这些人主要为西街地区的居民。国内外游客对噪声的反映有些不同，总体来看，国内游客对噪声的感知程度不明显，而国外游客则有 30%的人对“阳朔噪声小”这一观点持反对态度，究其原因，受访者主要居住在西街附近的旅店，其中主要是因为西街内部叫卖声、广播以及酒吧的噪音影响。

7.5 固体废物

7.5.1 固体废物处理率提高

2014 年间，投入资金 3000 多万元，完成了新城区自来水厂主体建设，安装外主管网 2000 多米。新城区污水处理厂完成投资 1500 万元。新城区污水处理厂、路网等建设取得了突破性进展，山水大道北段、览胜路、兰溪路、朝霞路四条主干道分 7 个标段同时开工建设，目前已完成路面清表 150 万平方米，路基土方 21 万立方米，完成征地返还安置区清表平整 1200 亩，兴福花园搬迁安置区清表 200 亩。二期实施的 6 条主次干道完成初步设计编制和专家评审，新城区各项目建设正按计划全面推进。投入资金 2400 多万元，全面铺开“美丽阳朔 清洁城乡”工作，村庄保洁、垃圾清运、处理设施逐步完善，有效改善了农村生活环境，提高了广大群众的环保意识。

7.6.1 感知：居民感知固体废物增多，游客感知景区环境有所下降

如图 7-9 所示，从居民而言，受访居民非常同意的占 20.1%，同意占 52.2%，居民普遍旅游使固体废物排放增多，认为旅游对固体废弃物排放没影响的居民占 14.8%，不赞同旅游使固体废弃物增多的居民占 10.5%，非常不同意占 2.4%。

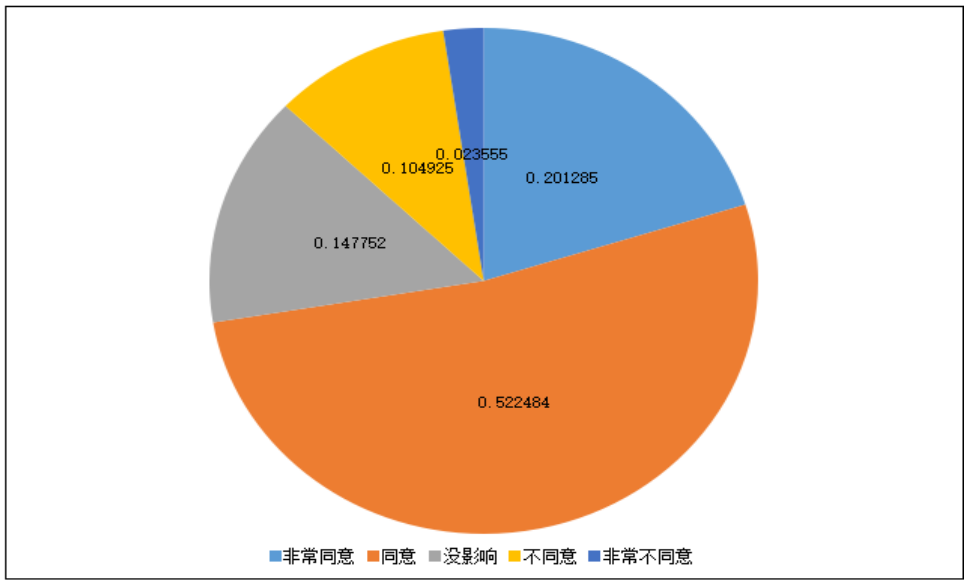


图 7-9 旅游是废弃物增多

从游客的角度而言，游客中对景区环境干净表示非常赞同的国内外游客分别占 20.8%与 17.3%；表示赞同的国内游客 46.3%，国外游客占 39.8%；持中立态度的国内游客占 24.1%，国外占 24.8%；表示不赞同的国内游客 7.6%，国外游客为 14.6%；而非常不赞同的国内游客为 1.3%，国外游客为 3.5%。

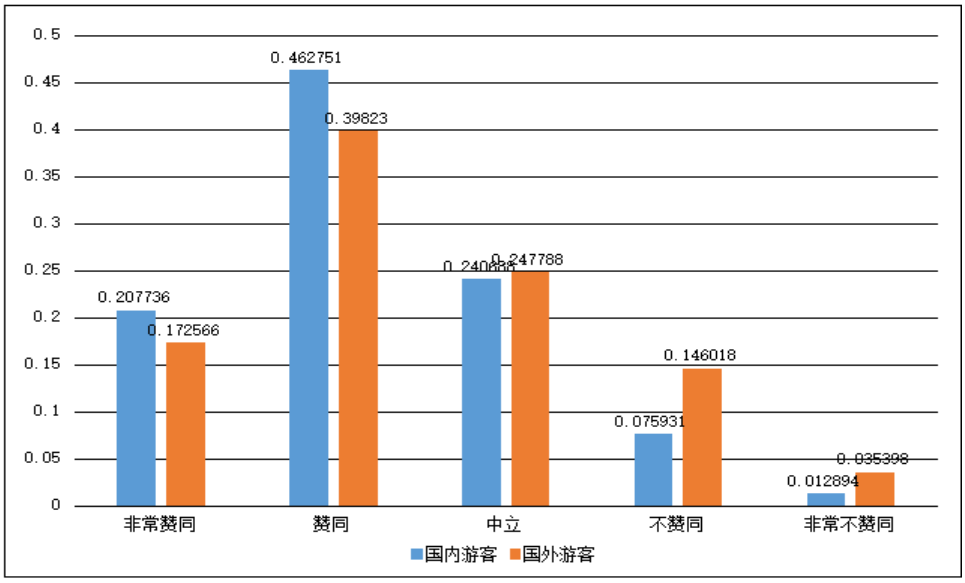


图 7-10 景区环境干净

总体而言，大部分受访居民认同旅游的发展使固体废弃物增加。每年游客人数的增加在衣食住行等各个方面都会产生相应的生活垃圾，如果不及时处理，不管是对景区管理管理还是游客的旅游体验都会造成消极的影响。而从游客的角度上，大部分游客对景区的环境整洁度都是比较满意的，但对比往年的数据，游客对景区的环境感知有所下降。同时，也有少部分游客反映个别地方环境情况有待改善，有些游客随手乱扔垃圾的现象也对其他游客造成了困扰。

7.6 景观维护及视觉影响

7.6.1 实施出台方案改善景观

2014 年期间，阳朔县政府印发了《关于禁止非法开（挖）山占地建房的通告》和《关于严厉打击违法用地和违法建设行为的通告》，制止和查处了一批违法开山、用地和违法建设行为，强制拆除了十里画廊、遇龙河、普益乡木桥路口等违法建设 125 处 1.33 万平方米。投资 1300 多万元完成了碧莲峰、龙头山等 48 座山峰危岩治理工程。建议联合执法队伍，加强“控违”、“拆违”专项整治，按照“零容忍、零补偿”的工作原则，重点拆除县城周边、十里画廊、遇龙河、景点景区周边违法建设，确保新的违法建设“零增长、全拆除、不反弹”，形成长效管理机制。

7.6.2 感知：居民维护意识增强，游客感知较好

从居民角度而言，大部分居民认为宾馆及其他旅游设施对景观的美感破坏没影响，占 33.8%，表示非常同意的居民占 13%，表示同意的居民占 27.6%，而不同意的受访居民占 22%，表示非常不同意的居民占 3.6%。

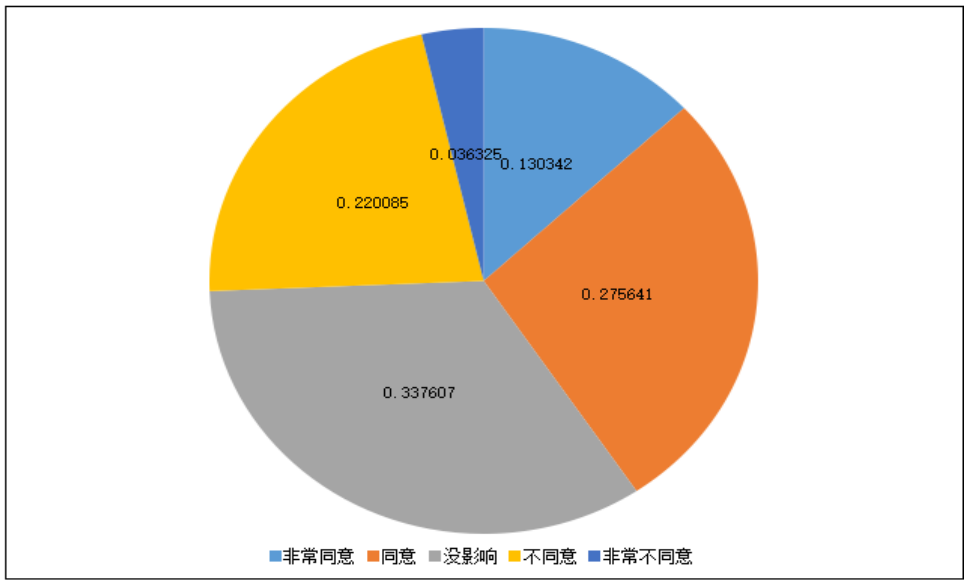


图 7-11 宾馆及其他旅游设施破坏了景观的美感

从游客角度而言，对于文化景点维护得当观点，受访国内游客中，表示非常赞同的占 22.4%，表示赞同的为 39%，表示中立的为 30.3%，表示不赞同的游客占 7.4%，表示非常不赞同的游客为 0.9%。受访国外游客中，表示非常赞同的游客占 17.2%，表示赞同的游客占 33.5%，表示中立的游客占 33.9%。表示不赞同与非常不赞同的游客分别为 11.8%与 3.6%。

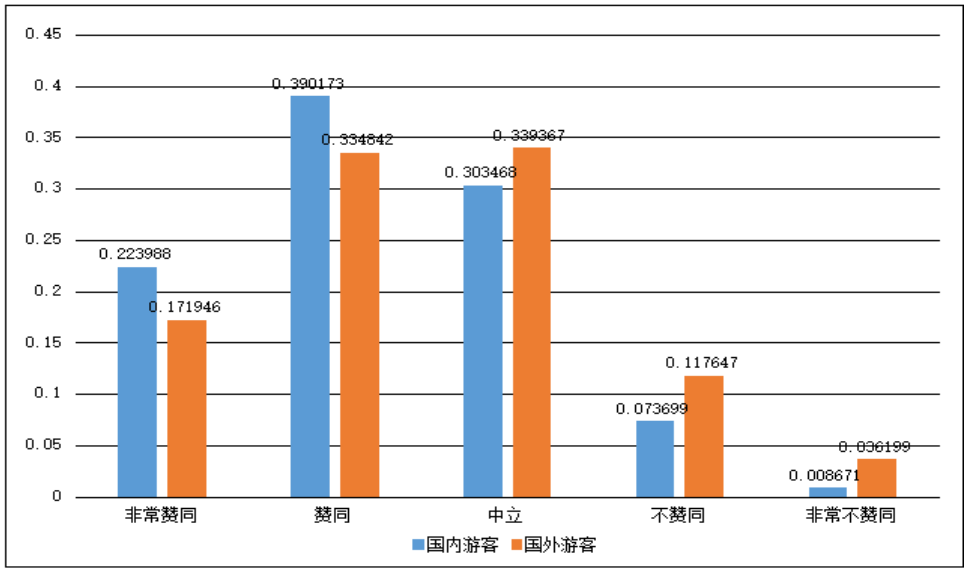


图 7-12 文化景点维护得当

从居民的感知来看，大部分居民不认为宾馆及其他旅游设施破坏了景观的美感，这些是可以给他们带来经济利益的建设，因此他们并没有感受到环境景观保护的重要性，但与往年的比较，居民对景观美感的感知逐渐上升，居民维护景观的意识增强，因此阳朔在维护景区美感的工作上仍需要加大努力。而游客，国内外游客总体感知文化景点维护得当，但是国外游客对文化景点维护得当不赞同的明显较多，说明文化景点维护仍然需要加大力度。

7.7 节能管理

早在 2011 年，阳朔县就已投资 2988 万元，完成了 9 个乡镇 63 个自然村农村电网改造项目 83 个，提高了农村电网的供电质量。在节约能源方面，阳朔县政府向旅游企业推广使用清洁能源，鼓励采取节能措施。

本次监测随机调查、访问了阳朔县不同类型旅游企业的业主，并得到 81 份有效问卷。问卷结果显示（图 7-13），32.9%的企业有采取节约能源、水资源措施。具体措施包括：使用节能灯、人为节约水电（限时用水，控制用电）、使用太阳能电器、LED 灯等。受访企业中没有采取相关措施，但有打算的企业有 31.6%。没有，并不打算采取节能、节水措施的企业占 35.4%。主要原因可分为两类：第一类，节约运营成本，增加节能设施短期会提升企业的运营成本，尽管长期来说是有利于企业发展的，资金是一个重要的原因。第二类，不了解能源节约途径和措施。

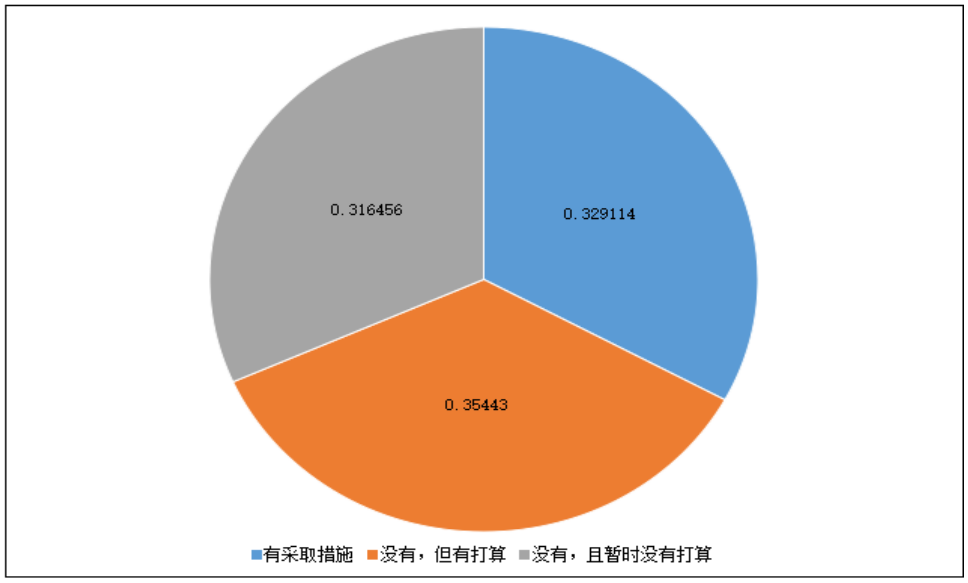


图 7-13 采取节能措施企业比例

7.8 本章小结

总体而言，阳朔县旅游资源与环境保护状况较为满意。政府部门在保护环境和资源方面上的工作到位，出台了相关的政策和方案促使环境保护，同时取得了一定的成果。在大气、水环境方面，居民对大气水体的感知有所上升，能够体验到当地的变化，但对于游客，则普遍对阳朔的环境感知持乐观满意态度。在噪声环境控制上，无论是游客还是居民，都认为噪声强度过大，影响到了他们的生活和游览，尤其在西街。在固体废弃物方面，居民感知到由于每年前往阳朔的游客数量的上升，对阳朔的景区环境造成了很大的破坏，同时，游客对景区环境的感知也有所下降，说明景区内需要加强环境卫生保护。在景观风貌方面，由于政府部门的方案措施实施，使景区的风貌能够保持在一定水平，从而提升了居民和游客的感知。在能源管理方面，能源管理受到自身资金和宣传知识的限制，企业的节能措施并没有实施到深处，企业不能很好地重视保护能源的重要性。针对以上情况，建议提出以下具体的完善内容。

7.8.1 环境保护

阳朔的可持续发展旅游需要注重大气和水环境的保护，阳朔的旅游依靠山水，水环境的改善，不仅能够让当地居民有一个良好适宜的居住环境，同时也是阳朔发展可持续旅游的首要任务。

7.8.2 噪音治理

西街内部的噪声强度过大，晚上的叫卖声、广播声以及酒吧音乐声使整个西街遍布着无处不在的噪音干扰，不仅干扰到了周边居民和游客的休息，同时也会降低游客满意度，对西街的发展不利，因此需要对重点噪声来源进行控制。

7.8.3 卫生

随着阳朔每年游客的剧增，带来的直接影响就是环境的破坏，固体废弃物的增多，在发展旅游的同时，关注景区内部的环境卫生是义不容辞的。

7.8.4 景观维护

景观的维护及视觉影响是可持续发展旅游中的一部分，居民虽然对景观的维护意识得到增强，但是仍然需要继续宣传和教育。在对景点外观进行维护的同时，也要重视对传统文化、风俗的维护，因为它们也是景观的重要内容。

7.8.5 节能减排

企业对于能源的重要性不了解，政府应该加大宣传保护能源、节能减排的理念，同时，政府需要帮助小企业在节能减排上提供资助和补贴，以促进能源管理的实施，实现可持续发展。

第 8 章　旅游产品与服务

对阳朔的旅游产品和服务的供给及需求情况进行调查与分析，是提升游客满意度、加快旅游发展的基本要求，也是阳朔旅游市场可持续发展的关键所在。本次监测主要通过问卷调查与观察记录的方式对阳朔旅游产品与服务的发展情况进行调查。一方面，通过游客问卷调查，了解游客到阳朔旅游的主要动机、游览线路等信息，以监测阳朔旅游市场的需求特征；另一方面，通过观察记录的方法，调查阳朔旅游硬件服务的提供情况，以对当地提供旅游服务的能力以及未来旅游发展的潜力有更清晰的认识。

8.1 旅游产品与服务监测指标

本部分主要通过旅游产品和服务范围的多样性、旅游地形象来说明阳朔旅游产品和服务的发展情况。如表 8-1 所示，根据《旅游目的地可持续发展指标使用指南》的要求，总结出本次监测的相关指标。

表 8-1 旅游产品与服务监测指标

主要监测方面	具体监测指标
游客对旅游产品的预期	游客到阳朔旅游的目的
	游客预计在阳朔停留的时间
游客对旅游产品的选择	吸引游客的店铺
	旅游商品的消费情况
	游客对旅游景点的选择
旅游服务范围	旅游目的地基本的旅游服务硬件设施类型
	旅游服务硬件设施的分布
目的地形象/游客对旅游产品的响应	游客获取目的地的信息的渠道
	游客期望获取的目的地信息
	游客重游的意愿

	游客推荐其他人到阳朔旅游的意愿

根据上述指标，设计游客问卷，进行问卷调查，并结合实地调研，调研组完成了有关的一手数据收集工作，同时，在当地相关行政部门的协助下，收集了部分二手资料作为资料的补充和数据的佐证。结合所获数据与资料，调研组分析了与旅游产品和服务相关的问题，包括游客预期、旅游产品、旅游服务设施、目的地形象等 4 个主要方面的特征，对旅游目的地旅游产品与服务可持续发展进行监测。

8.2 游客购买特征

游客消费前的预期特征的指标主要体现在监测问卷中的“请问您来阳朔的旅游原因是以下哪些方面”，“请问您预计在阳朔的停留时间为几天”两个方面，通过问卷所获得的数据结果，同时结合一些实地观察与访谈材料，对此进行分析与说明。

8.2.1 旅游目的:观光和休闲为主要目的

旅游目的在一定程度上反映了游客对旅游目的地的期望。了解阳朔游客的期望与消费动机是了解市场需求和细分市场的重要前提。调研组通过问卷进行调查，收集了国内游客有效问卷 714 份（有效率为 87.07%），国外游客有效问卷 227 份（有效率为 81.07%）。根据问卷中对游客旅游原因的调查结果，分析如表 8-2 及图 8-1。(此题为多选题，游客可选择多个旅游目的)

表 8-2 国内外游客旅游目的对比表

旅游目的	国内游客			国外游客		
	本年百分比	排序[2]	排序变动[3]	百分比	排序	排序变动
观光旅游	62.5%	2	-1	74.4%	1	0
休闲度假	63.7%	1	1	37.9%	2	0
商务活动	2.0%	9	-1	3.5%	8	0
公务会议、考察	1.8%	1	-1	1.3	9	4

2 注：按照选择此选项的游客比例大小从 1-13 排序，比例越大的选项排序越靠前。

3 注：将本年排序与上年（即 2013 年）排序相比，排序升为正，降为负，不变为 0。

		0		%		
公司、单位奖励旅游	3.8%	6	-1	0.9%	11	0
宗教朝拜	0.3%	13	0	0.0%	13	-1
科学考察	1.4%	11	0	0.4%	12	-1
野外探险	2.7%	8	-2	31.3%	4	0
摄影	10.8%	4	0	21.1%	5	0
探亲访友	3.8%	6	1	6.2%	7	-1
节事活动	1.1%	12	0	0.9%	10	-2
了解文化和美食	11.9%	3	0	35.7%	3	0
其他	8.5%	5	5	8.8%	6	1

根据表 8-2 数据显示，与 2013 年相比，国内外游客的旅游目的所占的比例排序并无显著变动。无论是国内游客还是国外游客，观光旅游和休闲度假均是最主要的旅游目的，有 63.7%的国内游客选择了休闲度假作为旅游目的，62.5%的国内游客选择了观光旅游；与此同时，有 74.4%的国外游客选择了观光旅游作为旅游目的，而选择休闲度假作为旅游目的的国外游客也达到了 37.9%。由此可见，阳朔仍然是一个大众旅游目的地功能突出的旅游地。

在国内游客中，除了观光旅游和休闲度假以外，其他旅游目的所占比重都比较小，了解文化和美食，摄影分别占到 11.9%和 10.87%，但与观光和休闲相距甚远，其余则均在 10%以下。而在国外游客中以了解文化和美食，摄影作为旅游目的的比例分别达到 35.7%和 21.1%，这一方面是因为外国游客对中国的文化和山水风光比较感兴趣，一方面也说明了阳朔国内游客市场转变具有较大的潜力，应

注意打造当地文化特色，增加相关文化与摄影相关服务。另外，国外游客旅游目的较强烈的还有野外探险，所占比重达到 31.3%，这说明新型旅游产品及功能在阳朔的发展潜力较大。

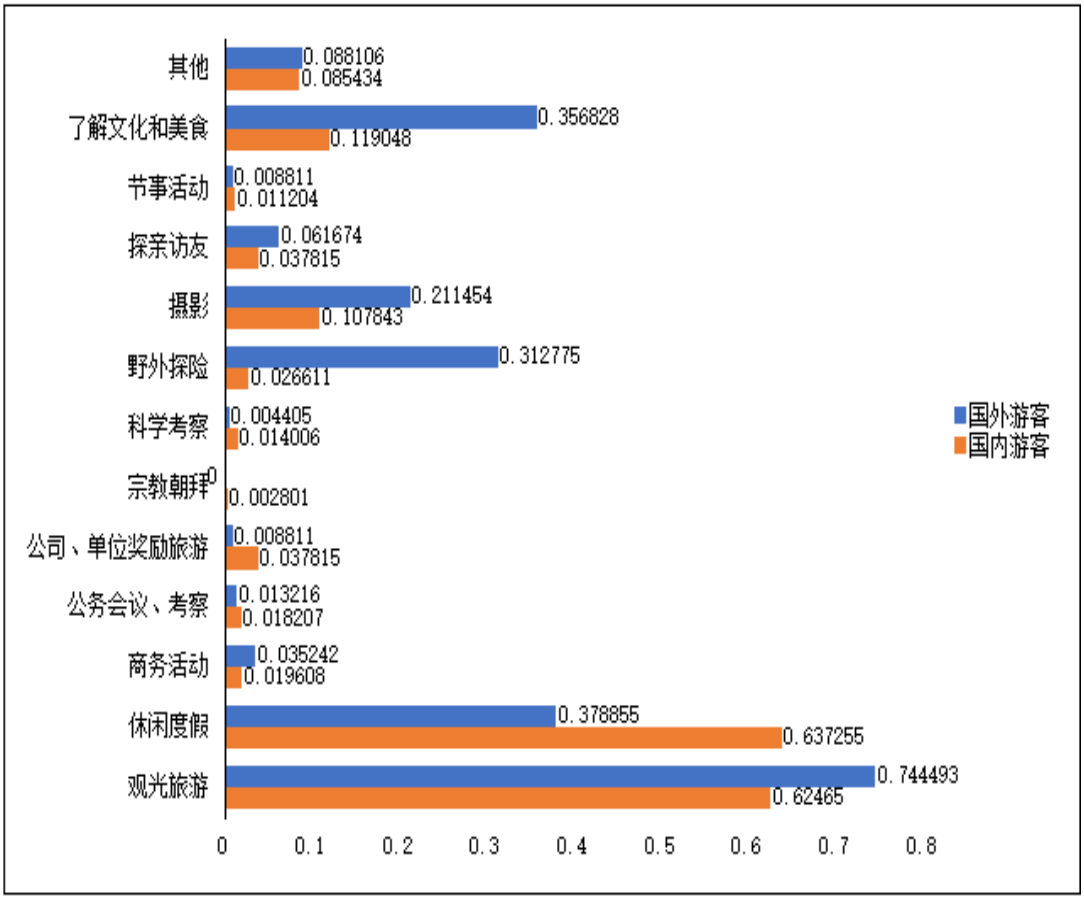


图 8-1 国内外旅游动机对比

在图 8-1 中可以看出，虽然观光旅游和休闲度假都是国内外游客的主要旅游目的，但是二者在这两个旅游动机上还是存在较大差异的，国外游客的观光旅游目的的比例高于国内游客，而国内游客中以休闲度假作为旅游目的的比例明显地高于国外游客，这说明阳朔的山水风光对国外游客的吸引力更显著。此外，差距较大的还有“野外探险”，31.3%的国外游客选择了此为旅游目的，只有 2.7%的国内游客选择了此目的，这与国内外游客对新型旅游产品的认知和接受度不同有关，而国外游客的选择也说明了阳朔有发展探险旅游产品的条件与潜力，因此阳朔还应加强野外探险方面的旅游服务，并培养和带动国内游客在这方面的旅游积极性。国内外游客旅游目的的差异会影响到他们对旅游产品和服务的选择。满足不同旅游目的游客的需求，则需要提供更多样化的旅游产品。

8.2.2 预计停留时间：短时间停留为主，国外游客停留时间比较长

游客在阳朔的停留时间在一定程度上反映了游客对阳朔旅游产品和服务的整体感知状况。“通常，更丰富多样的活动可以吸引游客停留更久，体验时间更长。”停留时间越长，说明旅游产品和服务越能满足游客的需要。根据问卷调查数据，对国内、外游客在阳朔的停留时间对比分析如图 8-2 所示。

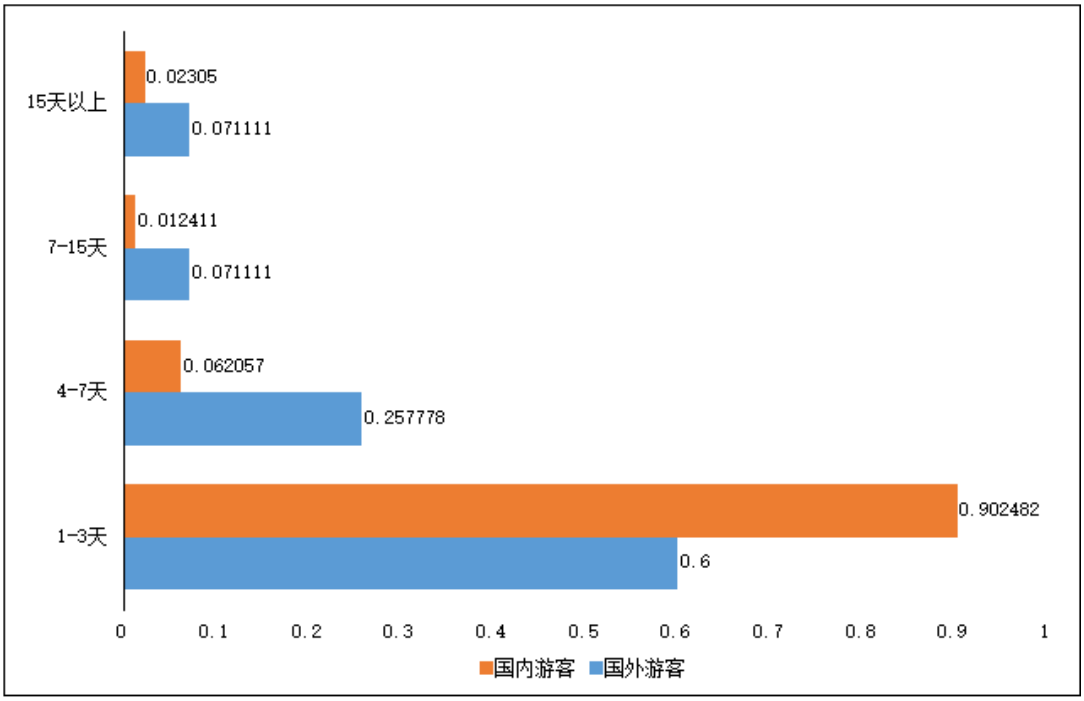


图 8-2 国内外游客停留时间对比

由图 8-2 可看出，不管是国内还是国外游客，停留时间大都比较短，90.2%的国内游客和 60.0%的国外游客的停留时间仅为 1-3 天。这与游客的旅游目的有一定关系，持以观光旅游为主要旅游目的的游客所接受的旅游产品和服务较为单一，导致旅游停留时间短。停留时间短这一特点在国内游客身上表现尤为显著，这主要因为国内游客中标准化服务，快节奏的团队游客较多，且来自周边城市的旅游者停留时间也较短，因此总体上国内游客的停留时间比较短。2013 年的调查结果中国内游客停留时间 1-3 天的比例仅为 76.7%，而 2014 年达到了 90.2%，这与桂林市高铁的开通有重要关系，2013 年 12 月底开始，桂林市开通了连接南宁，柳州，北海等区内城市以及长沙，北京等国内城市的高铁，在一定程度上使得交通更便捷，游客旅游节奏加快。

与国内游客相比，国外游客的停留时间相对较长，这一方面与国外游客的旅游活动有关，体验中国文化，阳朔文化和美食的外国游客比例较大，文化旅游包括学习中国功夫，中文等，而这些旅游目的的实现并不是短时间可以达到的，国外游客往往较深入地融入当地的文化和生活当中。旅游动机不

同，所选旅游产品和活动的不同，导致了国内外游客停留时间的差异，可见对不同市场群体提供产品和服务时要关注群体的需求差异，同时可见旅游产品和功能对游客停留时间有重要影响。

8.3 旅游产品

旅游产品的监测指标主要体现在“游客游览路线”（即游客选择的旅游景点），“吸引游客的店铺”，“旅游商品”三个方面。调研组根据问卷调查的结果和相关资料，对此进行了统计与分析。

8.3.1 旅游路线和景点选择：西街、漓江仍为必选景点

阳朔县的主要景点包括：阳朔西街、月亮山、历村、遇龙河、世外桃源、图腾古道、大榕树景区、印象刘三姐、龙颈河漂流、兴坪古镇、漓江、十里画廊、木山村、东街等，调研组选取了以下 13 个景区，均为已成型的旅游景点，作为本次监测的景点范围，研究游客对旅游景点的选择。（该题为多选题，游客可选择多个旅游景点。）

表 8-3 游客对旅游景点产品的选择偏好

旅游景点	国内游客		国外游客	
	百分比	排序	百分比	排序
西街	88.4%	1	71.4%	2
漓江漂流	64.6%	2	82.4%	1
二十元人民币	36.3%	5	39.6%	4
骆驼过江	6.7%	13	2.6%	12
蝴蝶泉	24.9%	7	5.7%	11
图腾古道	23.0%	8	1.8%	13
鉴山寺	7.8%	11	1.8%	13
大榕树	39.4%	4	17.2%	7
遇龙河	43.8%	3	37.4%	5
月亮山	30.4%	6	44.5%	3
龙颈河漂流	14.3%	9	19.4%	6
杨堤风景区	12.2%	10	12.8%	8
福利古镇	5.2%	14	10.6%	9
其它	7.3%	12	9.7%	10

从表 8-3 可以看出，西街和漓江是最受游客欢迎的景点。在所有的被调查的游客当中，88.4%的国内游客和 71.4%国外游客会选择前往西街，而选择前往漓江的国内外游客比例分别为 64.6%和 82.4%。最受国内游客和国外游客欢迎的景点分别为西街和漓江。这说明二者作为阳朔最为核心的两个景点，其产品的成熟度和承受度都达到了阳朔所有景点中的最高水平。值得注意的是，被称为“洋人街”的西街并不是最受外国游客欢迎的景点，反而是国内游客选择最多的景点，这也从数据上证明了西街已经不是当时的外国人聚集的地方，而是国内游客争相涌入的商业街。

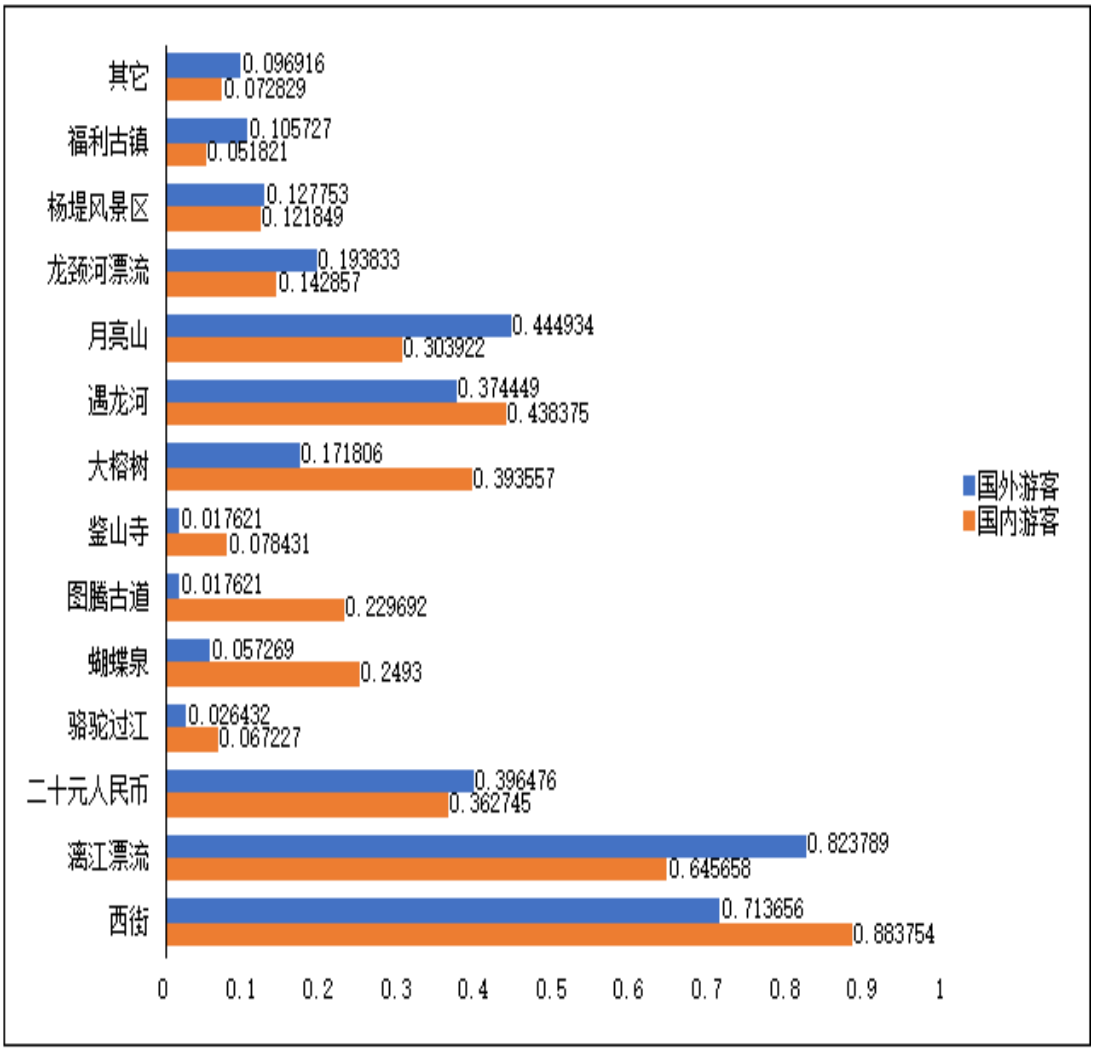


图 8-3 国内外游客景点选择偏好对比

从图 8-3 可以看出，在部分旅游景点中国内外游客的选择差异出现了比较显著的差异。蝴蝶泉，图腾古道，鉴山寺和大榕树是国内外游客选择差异最大的几个景点，这些景点的国内游客较多而国外游客较少，特别是鉴山寺和图腾古道极少国外游客前往。根据访谈和实地考察发现，这几个景点是团队游客较集中的景点，他们的旅游路线是经过了导游的安排的。而外国游客较多的景点有福利古镇和

月亮山等，此类景点都是带有浓厚的地方文化色彩的景点。此外，根据访谈和观察，旧县，攀岩地，金水岩等亦是外国人较为集中的景点。

综上所述，西街和漓江仍然作为阳朔的代表性景点吸引着大部分的国内外游客，是较为成熟的旅游产品。图腾古道，蝴蝶泉，鉴山寺，大榕树景区这类人为打造与建设较多的大众景区则为国内游客选择较多。国外游客则更倾向选择大众游客较少、体现民俗文化或满足特定旅游需求的景点。

8.3.2 吸引游客的店铺：酒吧和手工艺品店最受欢迎，国外游客偏爱中式餐馆

关注当地各种店铺类型对游客的吸引力，可以了解游客的兴趣点与需求，同时也一定程度上反映了当地各类店铺的发展情况，对于找准目的地在不同游客群体中的定位有一定作用，也有助于当地商业环境的发展均衡，保持多样性。（此题为多选题，游客可选择多个感兴趣的店铺类型。）

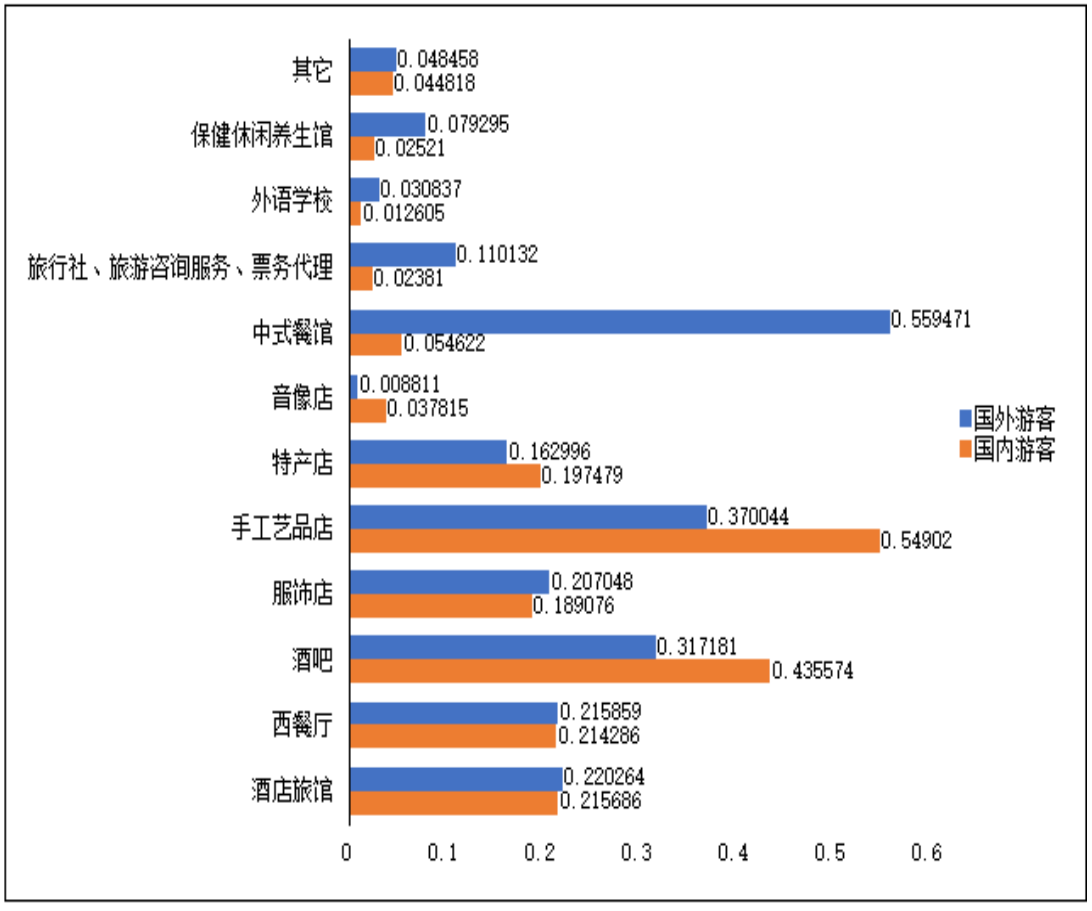


图 8-4 吸引国内外游客的店铺类型

从图 8-4 可以看出，手工艺品，酒吧，酒店旅馆和西餐厅是最能吸引国内游客的店铺类型，分别占 54.9%，43.6%，21.6%和 21.4%，而酒店旅馆和西餐厅在 2013 年的数据仅为 18.5%和 16.7%，说明

酒店旅馆和西餐厅对国内游客的吸引力有一定的提升。而在国外游客方面，最具吸引力的店铺是中式餐厅，手工艺品店和酒吧，选择这三种店铺的人数分别占调查人数的 55.9%，37.0%和 31.7%，与 2013 年相比，手工艺品店的吸引力有较大增强，2013 年该店铺类型的选择人数占比仅为 29.1%.此外，国内外游客所认为的具有吸引力的店铺类型存在部分差异，其中最显著的差异体现在中式餐馆，手工艺品和酒吧。中式餐馆对国外游客的吸引力远远大于国内游客，而手工艺品和酒吧则更能吸引国内游客。

总体来说，目前阳朔最具吸引力的店铺类型仍是酒吧和手工艺品店，同时也应更关注国内外游客的兴趣点和需求的差异及变化，关注各种能满足不同游客需求的店铺发展，保持多样性和均衡。

8.3.3 旅游商品：手工艺品，特色食品为主导

游客对当地旅游商品的消费情况，是评价当地旅游产品和服务发展情况的重要指标，此次监测主要通过调查游客在当地消费的旅游商品类型和购买原因，对此情况进行分析。（均为多选题，游客可选择多个曾购买的旅游商品类型和购买原因。）

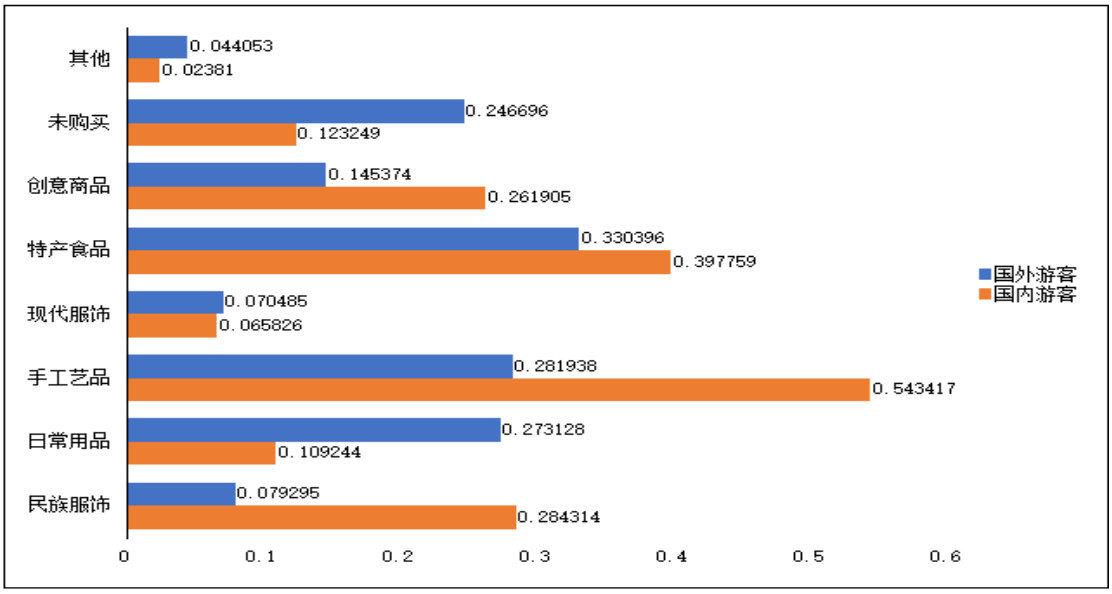


图 8-5 国内外游客的旅游商品消费

由 8-5 可知，国内游客消费最多的分别为手工艺品，特色食品和民族服饰，而国外游客消费最多的是特色食品，手工艺品和日常用品，这与吸引游客的店铺类型基本相符，说明游客在受到店铺的吸引后也受到了相关类型的商品的吸引，并产生了消费活动。

相对而言，国内游客对手工艺品和民族服饰的消费远远超过国外游客，而国外游客则更喜欢关注与“吃”有关的商品。此外，国外游客对日常用品的消费较大，这可能与国外游客停留时间更长有关，

停留时间更长，更需要到当地购买日常用品。民族服饰则对国内游客更具有吸引力，这可能的原因是国内游客对民族认知更敏感，富有民族特色的服饰满足了国内游客对民族文化的需求。

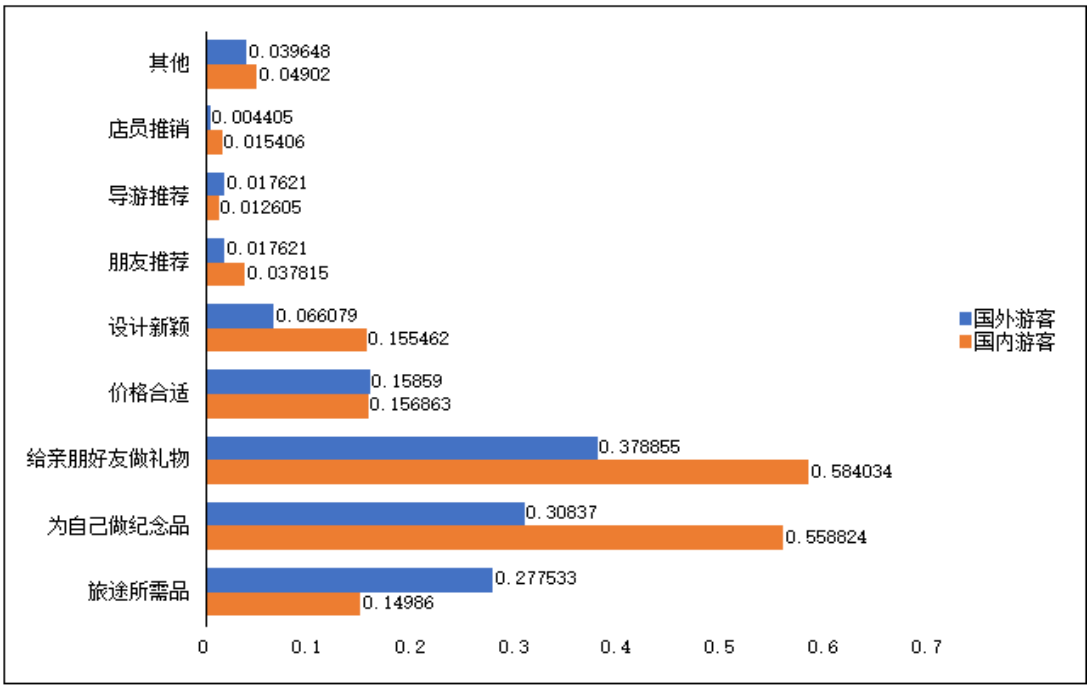


图 8-6 国内外游客购买旅游商品原因

由图 8-6 可知，给亲朋好友做礼物是国内外游客选择购买商品的首要原因，其次是给自己做纪念品，这与手工艺品，特色食品的商品性质有关，而这两个原因在国内游客中表现尤为突出，分别达到 58.4%和 55.9%，而国外游客基于这两个原因购买商品的比例也分别达到 37.9%和 30.8%。此外，旅途所需，价格适合，设计新颖也是国内外游客选择购买商品的较常见原因。其中旅途所需是国外游客购买商品的重要原因，这与他们购买日常用品相符。

8.4 旅游服务范围

旅游服务范围的监测指标主要为“旅游目的地基本的旅游服务设施类型”、“旅游目的地硬件设施分布”。为此，调研组分为三组，在三个区域进行了为期半天的实地排查式调研，收集了一手的店铺相关数据。

主要范围为阳朔县区域内主要的游客和居民聚集区域，并分为 A/B/C 区域。 区域 A 为图 8-7 中黄色区域，主要是以西街为中心的周边街巷，包括新西街、西街、神山路、蟠桃路、桂花路、府前路、芙蓉路、叠翠路、城中路、城北路、滨江路、碧莲巷、宝泉路共 13 条街道。区域 B 为图中绿色区域，主要是荆凤路周边，包括荆城西路，福缘路，响水路，乌藤路，龙岳路，将军路，画山路，兰花路，

荆凤路等共 9 条街道。区域 C 为途中红色区域，主要是石马路和抗战路周边，包括石马路，抗战路，鸣凤路，观莲路，进士路，桑园路，东街，武警路等 8 条街道。

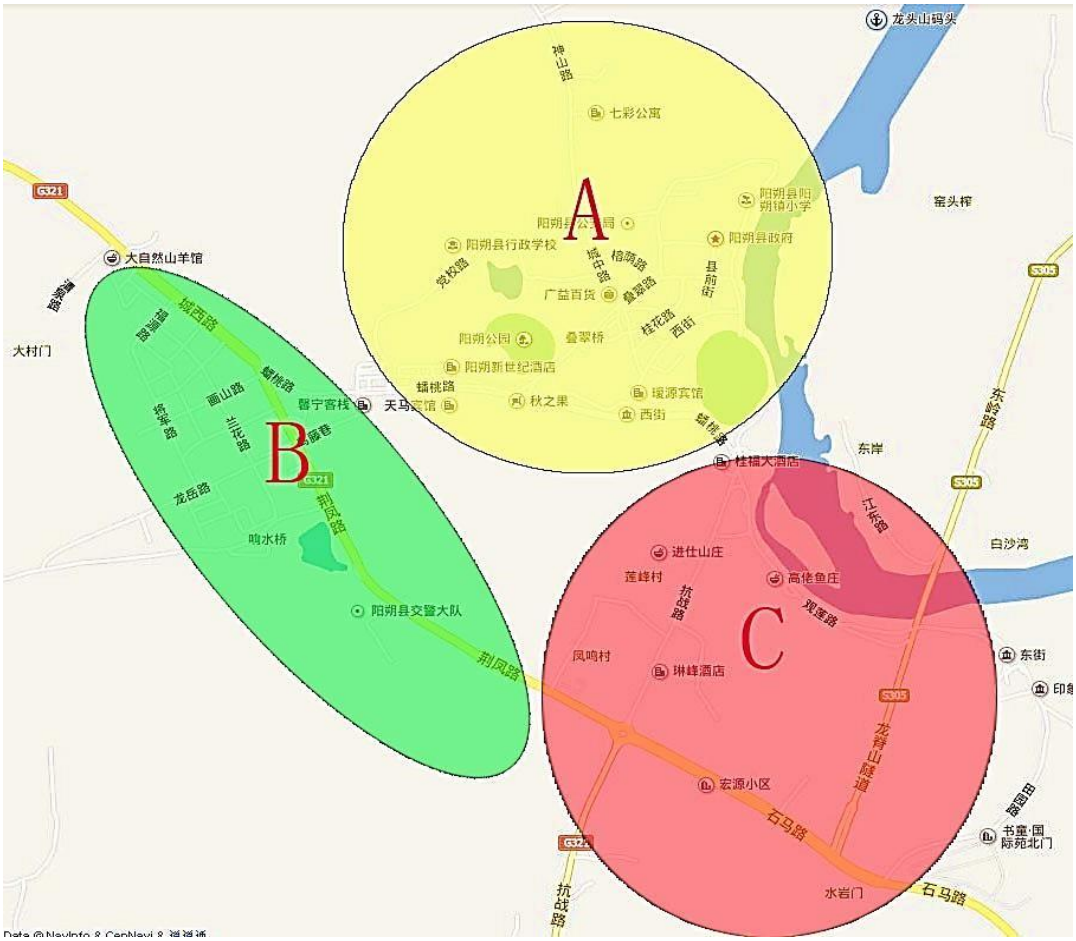


图 8-7 阳朔县服务设施分布分区图

8.4.1 服务范围：整体服务较全面

阳朔店铺的类型多样，如表 8-4。

表 8-4 阳朔县城店铺类型

分类	说明
酒店旅馆类	包括酒店、宾馆、旅馆、度假村、度假酒店、旅舍、客栈等主要功能为住宿的场所
饭馆类	包括饭店、饭馆、中餐厅、大排档、米粉档、美食档、小炒、火锅、早餐厅、等中式餐饮场所
酒吧类	包括酒吧与 KTV

西餐厅类	包括咖啡店、法式餐厅、意式餐厅、茶餐厅、美式连锁餐饮、披萨等西式餐饮场所
纪念品类	包括民族服饰、手工艺品、特产超市、玉器店、银器店、特色食品店、特色衣饰店、字画铺、服饰摊位等购物场所
旅游服务类	包括旅行社、单车租赁、攀岩俱乐部、民航代售处、火车票汽车票代售处、旅游咨询公司等服务场所
中式保健类	包括沐足、足浴、按摩、推拿、桑拿、休闲中心、休闲会所、按摩中心、养生会所等休闲场所
外语学校类	包括外国语学校、英文书院等
公共服务类设施	包括银行、邮局、医院、大型诊所、政府工作部门、学校、公共厕所、电信、药房、大型超市等
日用百货类(H2)	包括杂货铺、小卖部、五金店、小型超市、报刊亭、便民店等
休闲服饰类(H3)	包括品牌服饰连锁店、休闲服饰店、内衣用品店、床上用品店、鞋店、箱包店、童装店等
其他(H4)	为未进入分类的一些店铺
空铺	包括空置的门面房屋、正在装潢为开发的门面房屋以及长时间未开门的店铺

从表 8-4 可看出，阳朔县内的服务设施比较全面与完善，各类型的服务设施可以满足居民及游客日常和旅游的需求。

8.4.2 服务设施分布：游客集中区与居民区有所间隔，分工合理

各区域的商铺类型数量和占该区域总店铺数量的比例如表 8-5。

表 8-5 各类型店铺的数量和比例表

区域	区域 A	区域 B	区域 C

店铺类型	数量	所占比例	数量	所占比例	数量	所占比例
酒店旅馆	192	13.28%	95	14.98%	97	15.98%
饭馆	266	18.40%	113	17.82%	115	18.95%
酒吧	46	3.18%	0	0.00%	1	0.16%
西餐厅	48	3.32%	0	0.00%	2	0.33%
纪念品类	207	14.32%	14	2.21%	26	4.28%
旅游服务类	68	4.70%	20	3.15%	15	2.47%
中式保健类	36	2.49%	32	5.05%	6	0.99%
外语学校类	4	0.28%	5	0.79%	2	0.33%
公共服务设施	98	6.78%	65	10.25%	68	11.20%
日用百货	157	10.86%	84	13.25%	201	33.11%
休闲服饰	204	14.11%	16	2.52%	5	0.82%
其他	120	8.30%	190	29.97%	69	11.37%
面向对象						
面向游客的店铺	496	34.33%	178	27.81%	142	23.01%
面向游客与居民	6	42.77%	1	20.00%	1	22.04%

的店铺	18		28		36	
面向居民的店铺	3 31	22.91%	3 34	52.19%	3 39	54.94%

根据表 8-5 和图 8-8，图 8-9 所示，从区域的店铺类型比例对比可见，区域 A 为商业和游客密集区，此区域的酒店旅馆、饭馆、酒吧、西餐厅、纪念品、旅游服务类设施在数量上均明显多于其它区域，比例上看，区域 A 的店铺以面对游客的功能为主，只面向游客的店铺达到 34.33%，同时面向游客和居民的店铺达到 42.77%。

区域 B 和区域 C 主要为居民区，而此两个区域中，区域 B 相对来说面向游客的店铺比例较大，数量上看，此区域酒店旅馆、饭馆区域较多，而纪念品、服饰店等购物场所较少，说明此区域可以满足游客的住宿和餐饮需求，但商业购物氛围较淡，而除酒店饭馆以外较多的是家电，摩托维修店，汽车销售及美容等面向居民的店铺。

区域 C 主要为居民区，数量上看，此区域的酒店旅馆，饭馆的数量和比例等与 B 区相似，但酒吧、西餐厅等基本没有，而日用百货等更多服务于居民的设施较多。比例上看，面向游客的比例是三个区域中最少的，而服务于居民的店铺比例则最大。

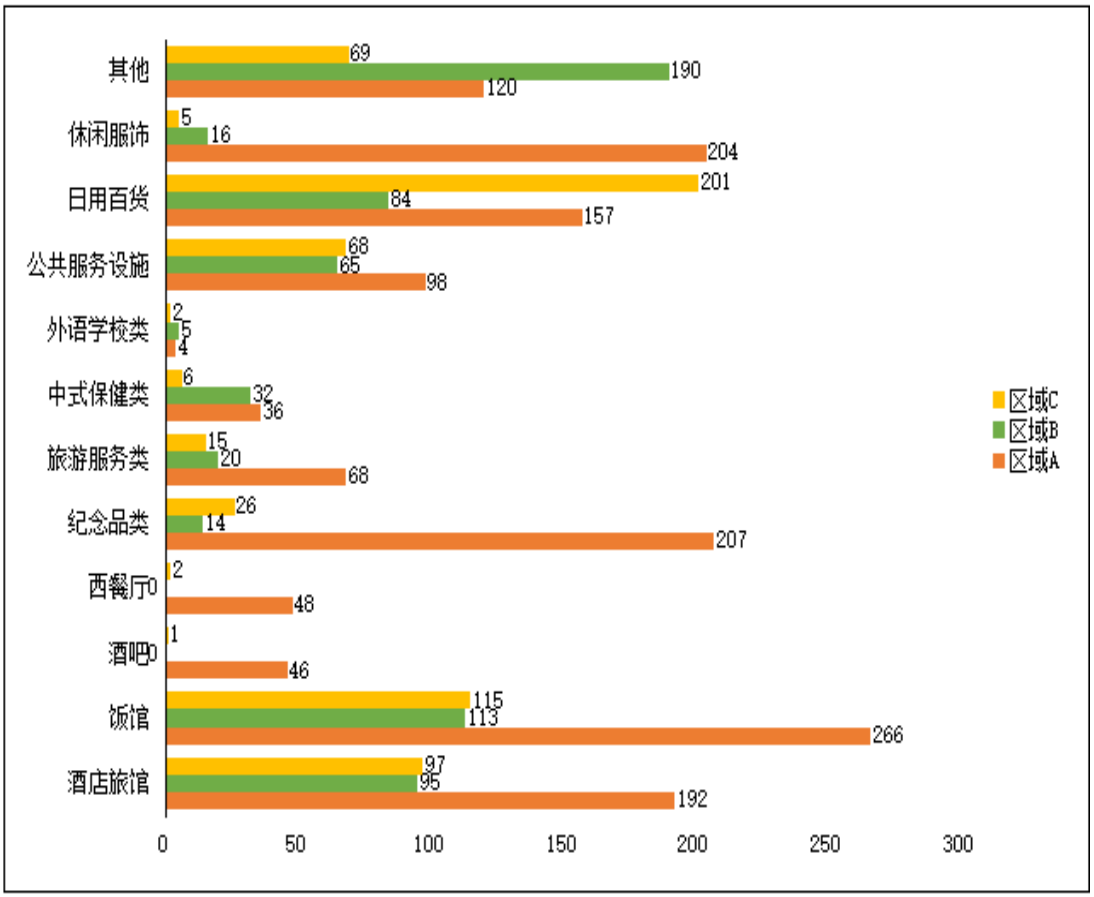


图 8-8 各区域旅游商铺数量对比图

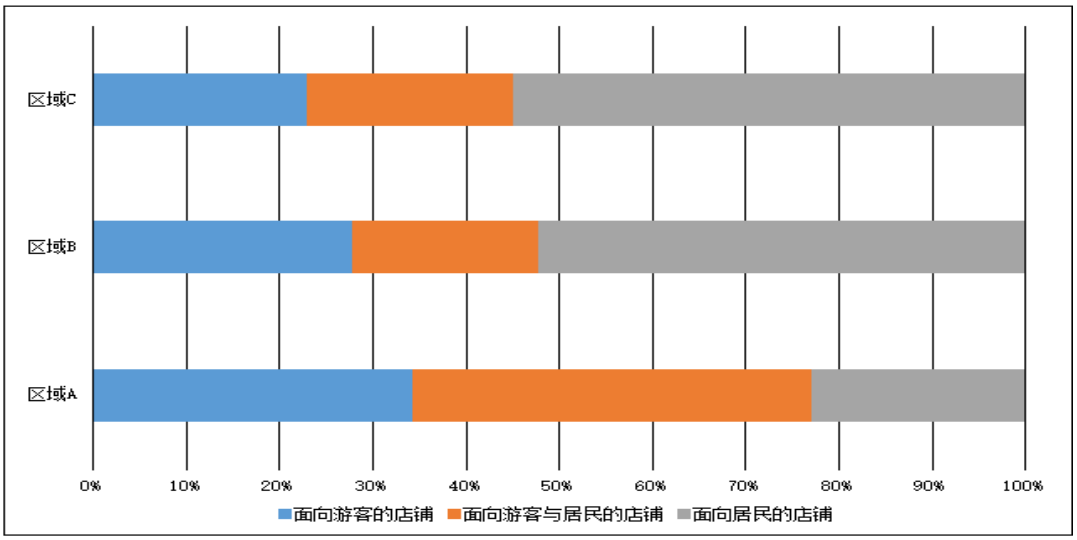


图 8-9 各区域旅游商铺面向人群对比图

总体来说，旅馆、饭馆、公共服务设施、日用百货的数量较多，在各区域的分布较均衡，利于整体接待和服务的提供，而酒吧、西餐厅、旅游服务、纪念品类的店铺等分布较集中，这样的分布特征

比较符合居民和游客的需求，旅游的发展不会过多地影响到居民的生活，而公共服务和日用品的广泛分布更方便居民和游客的日常需求。

8.5 游客对旅游产品的响应

旅游地形象指标主要体现在“游客对旅游目的信息获取渠道”、“游客期望获取的旅游信息”、“游客的重游意愿”、“游客向他人推荐的意愿”五个方面，通过问卷的方式，分析游客对旅游目的地形象的期望、信息获取、形象感知、传播等方面的情况。

8.5.1 获取信息的渠道：以网络和口碑传播为主

了解游客获取信息的渠道，有助于选择更合适的目的地形象营销的方式，同时可以了解各营销渠道的有效性，游客获取阳朔旅游信息的渠道如图 8-10。

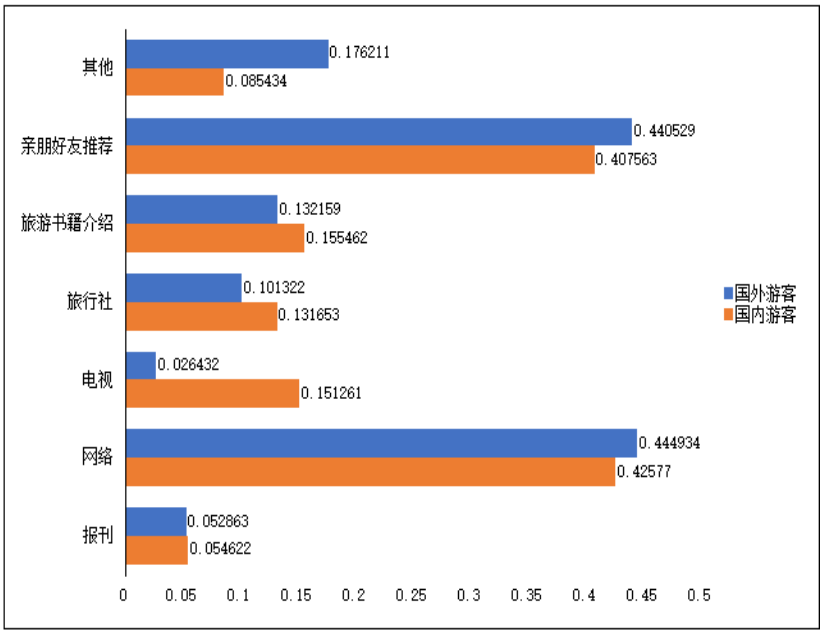


图 8-10 国内外游客获取信息的渠道

国内游客和国外游客获取信息的渠道与 2013 年相比大都没有太大的变化，变化最显著的是国内游客通过旅行社获取信息的比例，由 2013 年的 24.2%变为 2014 年的 13.2%，根据访谈和小微企业沙龙的会议结果，发现可能的原因是野导现象等因素使得旅行社的团队游客比例日益下降而使得旅行社调整策略继而散客的比例上升，而散客在拼团之前的信息依靠旅行社获取的比例比团队游客小。而散客比例的增多原因是多方面的，除了旅行社本身的经营状况不佳导致团队游客增长缓慢以外，交通的便利性导致的散客的增加也是重要的影响因素之一。

由 8-10 可以看出，国内外游客获取旅游信息的途径主要都是网络和亲朋好友的推荐，此外，旅行社，书籍也是比较重要的途径。差异较大的是，国内游客从电视获取信息的比例明显较大，而国外游客较少从此渠道获取信息，说明国内电视介绍对阳朔目的地形象的塑造起到了一定的作用，而国外电视对此宣传可能较少。还有，国外游客通过其他渠道获取信息的比例较大，访谈和问卷文字说明中看出，主要是通过《Lonely Planet》或其他旅游指南的方式。

总的来说，游客获取信息的渠道较多样且较集中，特别是口碑传播和网站、旅游指南的传播，因此，关注目的地旅游产品和服务的发展，维护目的地形象，保证良好的口碑传播效应，对阳朔目的地营销尤为重要。

8.5.2 希望获得的信息：主要为景区和住宿等基本信息，国外游客对文化较关注

由图 8-11 可知，国内外游客最希望获取的信息为景区介绍，其次为住宿信息，两方面均是旅游中需要获取的最基本的信息，这方面与往年并没有太大的变化，而这些基本信息对所有游客都是必需的，因此要使游客能从各种渠道获得这些信息。值得一提的是，国内游客对费用的关注度下降较大，从 2013 年的 46.2%下降至 2014 年的 35.7%。

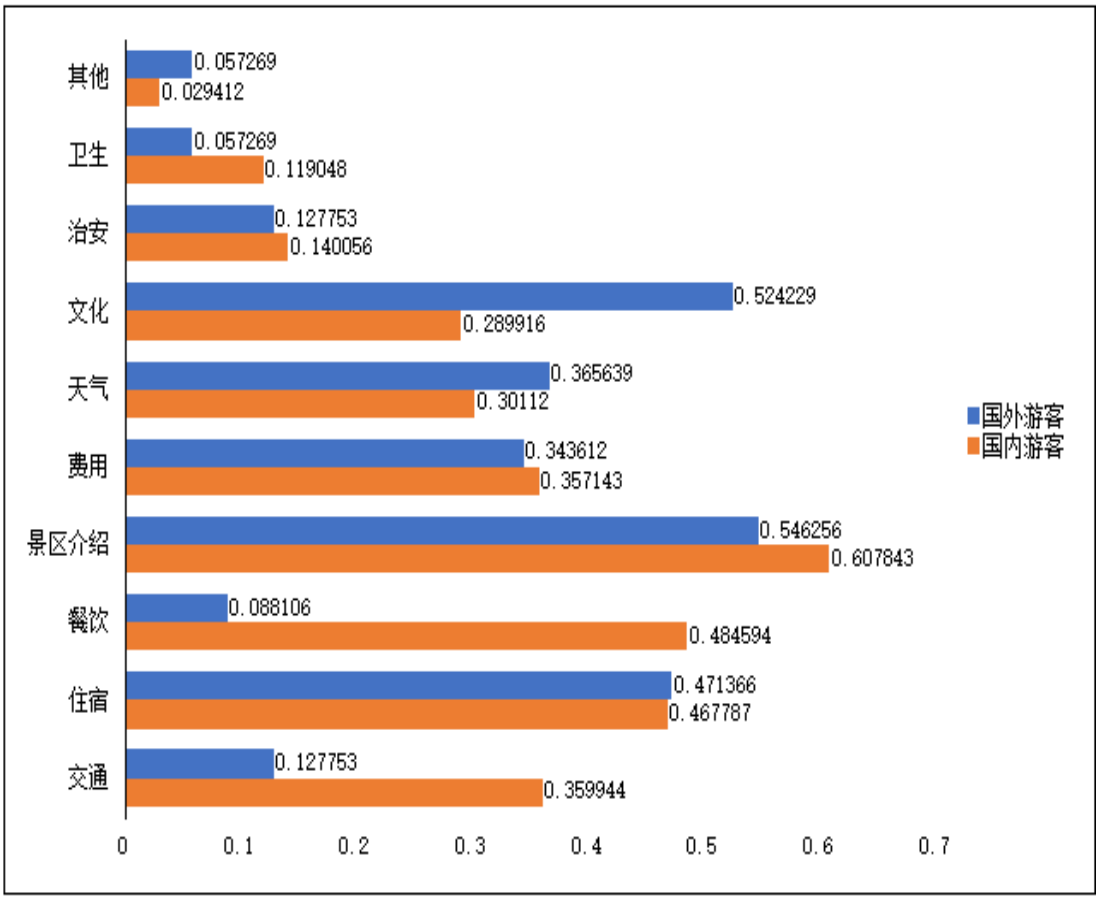


图 8-11 游客希望获取的信息

与 2013 年相似，国内外游客的差异主要体现在交通、餐饮和文化方面。国内游客对交通、餐饮的信息需求更大，原因可能是国内短程自驾游的游客较多，对餐饮的关注可能因为国内游客希望尝试更有特色的地方餐饮，而国外游客较容易寻找到与本国餐饮差异的中餐。国外游客对文化的关注比国内游客更大。

8.6 本章小结

通过问卷调查、实地调研、访谈等方式，调研组对阳朔的旅游产品和服务的发展状况进行了监测，情况可以由游客对产品和服务的预期、消费特征、反馈及产品和服务的客观发展状况体现出来。

8.6.1 旅游目的仍以观光休闲为主

游客在阳朔的旅游消费预期主要体现在自然观光、度假休闲等相关产品上，国内外游客期望的对比反映了其对相关的文化产品的预期存在的差异性。阳朔旅游产品和服务的多样化仍有较大提升空间，如探险，攀岩，摄影等旅游产品可以作为新的旅游动机的发掘点。

8.6.2 标志性产品吸引力强 ，特色商品较受欢迎

国外游客一般较热衷于旅游目的地旅游产品方面，阳朔的店铺类型、旅游游览路线等比较完备，能较好地满足游客的需要；其中，阳朔西街仍是阳朔旅游中较为有吸引力的旅游产品，国外游客倾向于享受阳朔的自然风光类，本土民俗文化等。对于有纪念意义的旅游景点，国内外游客行为较为一致，而国内外游客对蝴蝶泉、大榕树、图腾古道等这类人为建设较多的景点选择差异明显。而无论是对于国内游客还是国外游客，在对旅游商品的选择中，具文化特色的手工艺品、特产食品都是主导地位，而游客购买原因也以做纪念品或礼物为主。

8.6.3 服务设施区域分布均衡，总体较完善

阳朔县内的服务设施类型丰富，可以较大地满足游客与居民的需求，且区域分布较合理，商业氛围浓厚、游客高度集中的区域，居民集中的区域，及游客与居民混合住宿的区域有一定区分，使得旅游发展不会为居民生活带来过大负面影响。而游客较为集中的以西街为中心的区域明显地集中了酒吧、西餐厅、旅游服务、纪念品类等店铺设施，较好地服务了游客。

8.6.4 信息传播以网络和口碑为主

目前，大部分国内外游客对阳朔的旅游持较为满意的态度。阳朔的旅游形象已经深入人心，关于阳朔景区的介绍以“口口相传”的方式为主；网络方式的传播也成为形象宣传的主要方式。而游客最希望获得的信息仍是景区介绍、住宿这类最基本的旅游信息，在对外传播阳朔旅游目的地形象时，应重视利用好这些渠道和信息。

第 9 章　结论

通过对今年实地监测中调研获得的一手数据和二手资料进行分析，并与往年（2006-2013 年）的数据进行对比，主要得出以下结论：

9.1 阳朔居民对旅游发展持支持态度，参与层次有待提升

整体看来，阳朔居民对发展旅游持支持态度，并且绝大部分居民都从中获益，并且肯定了旅游发展对当地经济的促进作用。虽然居民支持旅游，但是居民的满意度在下降，越来越多人感知到利益分配不平等。大部分居民都认同的旅游发展所带来的正面影响，特别是经济方面并且也感知到旅游所带来的负面影响，特别是环境方面的，如空气污染、水污染，交通拥挤方面的感知尤为强烈。居民参与旅游的意识强烈但参与程度及层次有待提高。与往年一样，居民参与旅游决策、获得旅游信息的渠道并没有很大的改善。政府在调节利益分配机制，改善环境以及建立居民获得信息、反馈信息的平台这些方面需要加强。

9.2 自助游游客比例高，景区相关信息介绍需加强

阳朔游客的旅游方式以自助游（国内游客占 65.4%，国外游客占 70.9%）为主，国内游客开始脱离大众旅游，追求一些更加特别的如了解文化和美食、摄影，野外探险等旅游动机。虽然前往阳朔旅游的游客很多但是大多数游客在阳朔停留的时间短，旅游消费不高。因而应注重提高旅游产品的服务质量与特色，通过组合式营销延长游客停留时间。国内外游客接触、了解到的阳朔旅游信息主要来源于网络平台和亲朋好友的推荐，但无论是网络平台还是亲友推荐，口碑效应对阳朔旅游都非常重要。监测发现，国内外游客最希望获取的阳朔旅游信息是景区介绍，分别占到 19.26%和 20.16%。因此，后期网络平台旅游信息宣传，应注重景区介绍及相关旅游配套信息的说明。

9.3 旅游资源及环境享有好评，餐饮服务及公共交通亟需改善

阳朔作为旅游资源丰富、景色优美、地方风情浓郁、居民友好、社会治安状况好的旅游地吸引了大量的国内外游客，他们追求的旅游体验不尽相同，但通过对他们进行问卷调查及访谈得出他们的旅游体验多符合或高于预期。这从侧面突出了游客对于阳朔的旅游资源、旅游环境高度满意。在服务方面，游客对于住宿与娱乐服务基本满意，但对景区、餐饮及公共交通服务表示不满。餐饮同质化、价格不透明等，让游客对于阳朔餐饮产生了反感情绪；公共交通系统不完善需要大量自行车进行支撑，使以自助游为主的游客出行不便。

9.4 阳朔的健康与安全状况好，居民游客满意度高

目前阳朔的健康与安全状况属于中等偏上的水平。国内外游客对阳朔的餐饮卫生、住宿安全及治安状况方面表示相对满意，而在住宿安全方面仍有提升空间，特别是针对国内游客住宿方面的服务或配套设施的改进；居民对当地治安、医疗方面也持较为满意的态度。另外，政府相关部门进一步加强了对当地的餐饮及环境卫生的规范和整治，不断改进治安状况，营造旅游安全生产的大环境，进而突出阳朔健康安全的旅游目的地形象。

9.5 旅游业促进了阳朔整体经济发展，商业结构自主调整

旅游业积极地促进了阳朔社会经济的全面发展。集中体现在旅游的经济创收大；对财政贡献逐年增加；带动了农业、商业、手工艺等相关产业的发展；为当地居民创造了就业培训和就业机会；并且促进了当地的招商引资。通过对比 2011 至 2014 年的商铺功能变化数据可以看出，在经过 2011—2013 年面向游客和面向游客及居民的商铺比例总和上升之后，2014 年有了明显的回落，这体现了阳朔商业化在变化的旅游形势当中进行自我结构调整的过程。而且在与旅游者密切相关的 6 大类商铺当中，除了饭馆类和旅游服务类比例有所上升之外，其他均有小幅度降将，也反映了旅游商铺业态随着阳朔旅游形势和旅游者具体需求的变化进行调整的过程。

9.6 自然旅游资源吸引力高，合理规划需落实

在旅游资源方面，游客对核心吸引物和重点观光景点的选择偏好影响了旅游资源的规划和控制。从市场的反映来看，游客在选择上更倾向于自然风光。综合以上两方面内容可知自然类景区是阳朔发展旅游的核心旅游资源。因此，必须加强对自然类景观的维护，对自然环境的保护、对自然类景观基础设施的维护、以及对自然类景区经营的有序监管。在旅游流量方面，合理开发的同时应注意人流的疏导。此外，土地功能的转变及对其的利用和是旅游目的地可持续发展规划的基础。阳朔的旅游规划与控制必须按照自身的实际情况，用发展的眼光制定切实可行的计划，并对规划的实行做严格的控制和要求。

9.7 旅游资源与环境保护总体状况良好，噪音控制需加强

阳朔县旅游资源与环境保护总体状况良好，居民及游客普遍对阳朔的环境感知持乐观满意态度尤其在景观风貌方面，由于政府部门的方案措施实施，使景区的风貌能够保持在一定水平，从而提升了

居民和游客的感知。尽管如此，有些方面仍有待改善，具体表现在噪声环境控制上，无论是游客还是居民，都认为噪声强度过大，影响到了他们的生活和游览，尤其在西街。在固体废弃物方面，居民感知到由于每年前往阳朔的游客数量的上升，对阳朔的景区环境造成了很大的破坏，同时，游客对景区环境的感知也有所下降。在能源管理方面，能源管理受到自身资金和宣传知识的限制，企业的节能措施并没有实施到深处，企业不能很好地重视保护能源的重要性。

9.8 旅游产品正在转型，服务设施分布较均衡

阳朔旅游目的仍以观光为主，目前标志性景点以及具地方特色的旅游商品依旧具有较强的吸力。旅游产品正在向更多高层次、更富特色、更多样化的方向发展，并努力凭借网络与口碑传播目的地的旅游信息以吸引游客重游及推荐。旅游产品和服务的多样化仍有较大提升空间，如探险，攀岩，摄影等旅游产品可以作为新的旅游动机的发掘点。此外，阳朔县内的服务设施类型丰富，可以较大地满足游客与居民的需求，且分布较合理，商业氛围浓厚、游客高度集中的区域，居民集中的区域，及游客与居民混合住宿的区域有一定区分，使得旅游发展不会为居民生活带来过大负面影响。

附录一：小微企业沙龙录音

孙九霞：阳朔其实是小微企业特别多，这是中国其他地方发展中的不一样的一个特点，其他地方有可能是大企业的进驻带动了当地的旅游发展，但阳朔呢不是这样子的。小微企业呢，在坐的各位是他们的代表，那我希望大家看看，今天下午着重讨论一下精英，目前国内外旅游业中出现的一些新的动向，这些动向呢不是大的规律，而是你们在经营、在管理中遇到的、感受到的一些变化，可以是一些积极的方面好的方面，也可以是我们面临的一些问题，同样也可以谈谈对阳朔现在旅游发展中面临的建议，这是我们会议的基本的目标。等一下讲一下形式呢再那个。接下来由我们旅游局的黄局长给大家介绍一下

黄局长：在座的我有些不认识有些是老朋友，我也介绍一下，我是阳朔旅游局的副局长黄秀琴，我们这次会议从筹备到。。就是短短的两天时间，很感谢大家能够，我们当时是想把这个做得好一些，向大家发邀请函，因为时间太紧所以就是给大家打个电话，电话通知的形式，各位阳朔的旅游精英都是非常的配合。这位是中山大学旅游学院的院长、博士孙老师，孙九霞教授。她一直以来都是非常关心我们阳朔的旅游，非常支持我们的工作，今天这个会议的话虽然说个是小小的自由式的沙龙，但是对我们阳朔的旅游发展也是个很好的契机，对我们管理部门来说，我也想听听大家对我们的一些意见。因为我们孙教授，对我们阳朔的旅游小微企业，其实说是小微企业，但是有些我们的阳朔精英老板，已经做得很大了。然后我介绍一下，在我左边的这问帅哥，外国帅哥，是凤舞咖啡店的，名字叫 Roland。然后在他旁边的是秘密花园的老板，叫 Inn，他的中文名叫疯子英，觉得特别有特色，他的酒店非常好。接下来是我们的李莎酒店的老板，李莎，她在我们阳朔也是一个名人，代表阳朔到了一个国际舞台，展现我们阳朔美丽村姑的非常美好的一个形象。接下来是一个李莎的先生，也是李先生，姓李。接下来这位是我们原来旅游局局长，刘洪发先生，他现在是我们联合国世界旅游可持续发展阳朔观测点的观察员。接下来这位是徐琦，其实协会会长（4:30），这边是我们西街外国语学校欧校长，他接电话，他们对我们阳朔修学旅游这一块，也是有非常大的支持，他们几兄弟对阳朔修学旅游占 80%这样。下面这位是我们桃园酒店的老板——陆总，陆华平。然后是我们攀岩大师——西塘，这样叫你合适吗？

刘洪发：西塘是户外公司，户外运动。

黄局：应该是阳朔哪里的山好爬，比较好攀岩你都懂吧？

西塘：嗯，都懂。阳朔有很多好山好水。

黄局：接下来这位是我们阳朔本地的旅行社，山水国旅的老板——郑总。我们本地的旅行社现在只有 5 家，比较少。但是郑总的山水国旅作为我们地接旅行社，是做得比较好。接下来是我们阳朔的文联主席——莫主席莫高阳，他对推进我们阳朔的旅游和文化结合的这一块也是有他自己非常好的建议和见解。下面这一位周旭明周老局长也是原来我们旅游局的局长，他因为有点事情等下马上到。然后是我们玫瑰木的老总——黄总，听你的名字已经是如雷贯耳，已经听到过很多次了，但是确实还没有接触过。其实我觉得我们这样的形式的沙龙非常有必要。作为旅游主管部门，应该是多和大家沟通交流。

孙九霞：后面坐的一些同学呢是中山大学近年来进行旅游可持续发展监测的一些同学，他们有两位博士，3 位是硕士，其他就是旅游管理本科大四的同学，都是算是有点旅游体验的人吧来进行监测，他们也参与我们这个沙龙，以做听众为主，有问题的话也可以跟大家讨论。虽然在座的的有阳朔县政府的人，但事实上这是我们自己的一个沙龙，沙龙的话题希望我们畅所欲言，即使他们像黄局在这里但也没关系，没有问题，因为我们现在是直面我们遇到的一些问题，以及我们看到的一些东西，解决阳朔旅游发展的问题，看看有没有好的一些思路，进行一些探讨。我们是不是每个人先说一下，接下来我们围绕着一些话题再讨论好吗？你们喜欢听谁的，先听谁的？

Inn：Tom

孙九霞：那就陆总吧，先听陆总，刚才那个嚷嚷着让他叫你爸爸之类的，可能辈分比较高之类的。

陆华平：就是因为他们刚来阳朔的时候我们（9:12），做领队的时候他们过来，

孙九霞：大家在谈的时候可以用几分钟的时间来说一下你跟阳朔的结缘，就是你是怎么介入懂啊阳朔旅游业中来的。然后再看看目前碰到的一些问题。

陆华平：我做这个行业，那时候我已经在细节有一个小咖啡厅了，我和阳朔旅游结缘是我 89 年到阳朔来读个旅游职校，旅游职校结束以后呢我就有机会到一个旅游餐饮里面来工作，在那里做了 7 年，有从服务员到吧台员到厨师什么都做了，我就问老板说我想出来混一混了，我就到西街搞了个铺面。

孙九霞：哪一年？就是 97 年了，我就开始做一个小咖啡厅，那时候就开始接触很多游客了，那个游客呢就很多情况的话，当时 97 年的时候，还是外国的背包客比较多，我们中国的游客呢还是萌芽的阶段。旅游的话，全部是公款，还是单位的多一点。那时候我们接触的，80%的都是外国人。就是出于这个语言的问题，还有外国人的问题，加上我们一边努力读书的问题，好像我们一边读书，一边赚钱，一边上大学，就变成了以前我们说基本的英语的，到现在我们说语言向我们现在说话一样，没有语言障碍了。现在我们和疯子他们在一起玩的话，就像家里面一样，所以他叫我哥哥啦，我叫他弟弟，其实他比我大一点点啦。他们都叫我哥哥。很多东西我们都可以相互照顾一下，尤其是当时的他们刚到的时候，他们很多地方有些不清楚的，语言上面他们问一问啦，生活上面有些也问一问啦，以后再做生意做什么都问一问。

孙九霞：那哪一年认识的你们？

陆华平：2001 年，就是说他们就把我当成老大哥了，叫我哥哥的话也不过。现在呢其实我说实在话，我通过自己的努力呢，更多情况下他们一样，都是因为语言改变我们人生的，我们整个一生，都是因为语言这一块，改过来了，我有很多初中同学，高中同学，到了高中以上，我还去读了半年的函授，就是桂林的外大部，都是我们老板出钱给我去读书的，后来我读了职高，读了那之后的我觉得度的差不多了，我就不读了，读了差不多一年的函授大学，就是外大，最多的话我还是在社会上学的更多。在所有的学习工作过程中，我对阳朔的旅游发展呢，从不懂到懂，我之所以懂事的时间一直在阳朔。我从 18 岁开始一直到 40 岁，阳朔的整个旅游基本上都比较好。整个阳朔我们都知道，除了有的市场，完全是由外地引进，在外面把这个市场做得很（13:54）了然后再 2004 年以后，中国的假期根据 WTO 跟世界一样了，中国的旅游才起来了。

孙九霞：这个应该跟非典也有关系吧？03 年

陆华平：他是根据 WTO 这个假期调整的，黄金周。

美丽村姑与孙九霞异口同声：非典也有关系，更大。

孙九霞：因为当时国外游客他控制了，或者来的少

陆华平：接下来，游客那时候是 200 多万了，现在都 1000 多万了吧，很多外国人像 Sam 啊，疯子啊，还有 Roland 他们都进来。

孙九霞：Sam 不算是外国人

陆华平：他算是，他们算是第三批吧，我们算是第二批。Lisa 算第一批。

孙九霞：你们都算了的，很像黄埔一期，在这里 Lisa 是一期的

陆华平：Roland，inn，他们算是第四期了

Roland：我们不喜欢 4 这个数字，5 吧

陆华平：所以整个市场都变了，以前背包客市场的话，旅游基本上靠自己努力，向我们以前努力努力下就可以了，像现在还不行了，因为这个市场变了，完全竞争变了，变成要做标准化了，还要做成企业，企业那个连锁店了。以前我们努力努力赚钱了就可以跑去旅游去了，现在不行了。像现在 Sam 已经转去做连锁了，像现在做连锁才能活了，做夫妻店在阳朔这个市场上已经有问题了。接下来像麦当劳肯德基一站发两站的话（16：20）我们就没事做了。我们也是要走这个市场，走这个市场的话我们可以看到这个问题，做小的已经做不了了，除非是特点的，或者是烧烤的，还做得了，如果做大一点的话你得是做标准化或者是连锁店，就死翘翘了，我们就这样子。还有一个呢，因为我也经常个拍电影的有关系嘛，跟电影做过翻译之后接触到好莱坞的片子嘛，就很多人来这里片子，我们到了横店义乌这一块，

他们那边都在借旧城做电影城，阳朔就是取得外景，他们在返厂和转厂的时候就花很多钱，所以我就想，阳朔如果能够搞一点电影城，或者是说不需要完全去做，但政府能过把村庄定点的，比如说这个是明朝村啊，那个是汉朝村啊，这个是宋朝村啊，把外景做成那样子就可以了，也不用花很多钱，像横店一样用那么大的地方，但如果能够做那种外形的话，把这种做好了的话，阳朔如果有这种氛围的话，是可以流芳千古的，因为每一个人都可以做演员，每一个人以后介绍来的话你有（去处）了。现在阳朔这里电影公司来这边的话除了拍外景，除了美丽的山和水以外其他基本上没有了。

还有我们的县城的话建筑的房子太高了，还有一个，等一下我们大学生会讲到，有个从老师，他们会有很多那个作品，说明那个（一村一品）的，就是说，把每一个村庄做一个产品出来，这样（风水印）他们老宅子村是吧，那个地方卖古董的，搞几个（铲），或者是做一条街，专门卖古董的。以后，要做村庄，特定的村庄，像泥塑村啊，还有（捏人村）啊，后面让学生去学习。

我在这个市场上看到呢，基本上就是这个样子了。哦，对，还有一个。

我们现在在阳朔游这个现象每一个外资投资的，生意都比较好，像外国人做的话就做得比较好，像我们的“疯子”他们做得比较好，其实他们做的，除了他们本身的文化以外，还有一个就是与我们中国的现在的国情流行的，这个国情的走向（有关）。像我来说，去年我就想请一个外宾帮我管理啊，帮我联手做事情啊。但是，我们这一点的话，我去问了那个桂林市劳动局，把所有的材料准备好，到那才发现，他跟我们讲了一句话就是说，中国企业保护中国人，你要人要请中国人，你去请外国人的话那我们中国人就没事做了，还有一个个人单位的也不能请外国人，只有外资的，还有一个中外合资的企业可以请外国人。我在想，外国人拿洋枪打我们，那我们不可以请外国人拿洋枪打他们吗。我是在说，我们的文化，现在的话，暂时有十年到二十年，你看这个上海，北京啊，做这个企业，有外企的话都做得比我们好，因为什么啊，因为外企的话管理上面会好一点，管理上面，还有一个人情服务方面。还有一个，招聘员工的时候大家都愿意往外企方面走。但我们中国自己的个人企业和个体单位的话，对我们无疑是雪上加霜，我觉得我可以提建议的话，我要向中国的劳动局提一下建议，就是我可以帮外国人交税完税这一块做好了，你也可以请。这是我的一些建议，虽然我不知道这个对谁坏，但我们这个沙龙上面可以随便讲话，我把我的心里话讲讲。

我的话讲完了，谢谢。

欧校长：

我在这里简单补充一下那个外国人的事情。我们是学校嘛，其实这个情况是完全可以的，只不过要完成一个手续，一个叫做外国专家证，聘请许可证，你把材料收集以后，然后通过劳动局就可以请过来了。

（孙老师问：他不是专家呀，没关系是吗，就业证是吗。）

欧校长：对对就业。阳朔这个学校，按照规模比你们（陆华平）这个饭店还小，但都有聘请资格证书。

（陆华平问：但是你们是学校，我们是做生意的）

欧校长：没有，公司都可以。

（IAN 补充：他不是那个意思，他的意思是桂林看不到外国人过来有用，他们就觉得个中国人机会，不是可不可以的问题）

欧校长：公司都可以的。

（陆华平补充：我那时候都生气，我花了一个月来准备材料•••）

（孙老师：我们到时候可以交流一下，看用什么方法可以解决•••理论上是可以的）

（老局长：小企业想请员工请不到，但是政策还有什么障碍不能让他到那里打工）

欧校长：他是建议不能。公司都可以的，必须把酒店变成一个公司。

（孙老师：他这个学校也是企业，他不是学历教育的，他不是办义务教育的，所以他也是个企业。

欧校长：讲到这里呢我也讲一下刚才陆老板讲到的，为什么老外在阳朔开企业开得越来越好呢，我个人认为啊，虽然我一直没搞旅游但我一直关注着旅游的市场。我们阳朔有两大特色，一个是山水非常漂亮，另外一个是外语氛围，交流无障碍，就像刚刚陆华平讲的。我们经常讲，英语已经变成阳朔的第二个方言，在任何地方，我们外国人都不会发生什么语言障碍。我们搞旅游的话，我是 90 年就来阳朔了，蛮早的，跟那个李莎，元老啊，搞得蛮久的。但是我们跟旅游的时候，就是永远一句话叫什么啊，跟外国人说阳朔还能干的一些事情。所以刚才陆老板也讲了，阳朔的很多旅游项目首先是来自于老外，因为老外他知道地方多，还有李莎讲的就是说，（国内旅游）发展得比较火爆的是 SARS。我个人看法呢还有一个原因就是网络，阳朔的网络是走在全国的前列的。按照现在来讲的话，我们个人拥有的网站，应该在全国县域里面讲是 NO.1，特别是像“疯子”他们的那个酒店，他推广，20 天的网络推广，特别是那个 GOGO 树，外面就是泥土房子，但是他的客人，我们一出来，全都是。每一座都是爆满的，他的价钱比县城里面还要贵。县城里面我们一些比较好的酒店的话，很漂亮的啊，大概是 80 到 100 块钱，但是他们一般贵一点，到 200 块，那就是个性化，这也是我们网上一个亮丽的字眼是什么，个性化发展。

那我们是搞学校的，对阳朔的两道资源（做评价的话），一个是阳朔的风景很漂亮，第二个是他的言语无障碍。原来我们搞修学旅游呢，我们也是一样的。原来我们学校搞来搞去总是依赖于阳朔资源，很多学校都搞不下去，我们学校从 93 年开始一直到现在，能够坚持下去的一个原因就是把阳朔的资源共享到全国各地。第一资源就是大学生，每年我都接待一两千的大学生，像湖南工学院啊，湖南社会技能学院啊，广西外国语学院啊，他们就是看中了阳朔的外语环境，我们还跟他引导一下，我们原来刚刚搞旅游的时候见老外聊天是容易的，但是提升我们英语水平，是靠同一个老外，交朋友，就像刚刚那个陆华平跟那个 IAN 交朋友，make friends，人跟朋友在一起的时候是无话不说的，那你就提升了你的文化水平。所以我们说英语水平有几个境界，第一个是平时的交流，第二个是 culture，文化，第三个是

use in business，用英语来做生意，就像跟 ROLAND 他们合作，ROLAND 他们（学校）搞了一个文化节。另外一方面是，我们中国的发展，外国人希望了解中国，他也要希望来学习我们中文，所以阳朔也有一个中文学校，专门教一些老外的。ROLAND 他们有一个很大的项目就是教老外学中文，中国的文化，包括太极拳，像“龙母山”的太极拳，很有名的现在。我们刚开始是不看好的，投资 200 万，外国人学生很多，他们付费就待得久了。再从旅游方面的话，阳朔的山水很漂亮，但是很多地方的山水也很漂亮，但是他（阳朔）能够把客人留在这里的话就是文化。我们提升我们的服务，像我们的印象•刘三姐，就是因为它把我们的旅游提升到一个档次。如果说政府层面的话，把它的文化，再具体实施，把中国的文化，刚才陆老板讲了一下，建立起它的一些项目，让把旅游加文化融在一起，让客人待得更久一点。像每年在学校里面的夏令营，我们的学生来了以后不只是学生来了，学生的家长跟着过来了，爷爷奶奶跟着过来了。他（们）来了一次以后，我个人认为，阳朔的旅游与别的地方还有一个最大的不同就是 Home，family，家庭式旅游，让人感觉就是到阳朔旅游，来 N 次也不会感到厌倦。我去北京，去别的地方，去青岛，去一次就没必要再去第二次了，包括丽江，我们没必要去两次三次，但阳朔就不一样。我们的外国朋友也一样，他只要一有空，就跑到阳朔来了，它是给你一种家的感觉。那么家的感觉是什么呢，感到累了，想也不想就跑到家里来。包括我们一些朋友也是这样的，在外面久了想来想去不对啊就跑回来了。像我们的员工，久了以后就带一些人过来。

（孙老师：多少员工）

欧校长：我们有几十个员工，我弟弟更多，我弟弟有八十多个。

（孙老师：你们一年的招生都是这种短期的吗）

欧校长：有短期的也有长期的，原来我们是搞了个中职学校的，中职学校现在是全国都不景气了，从今年开始我们（中职学校）就不招生了，以语言班为主。所以说阳朔旅游是一种家的感觉，就像你们聚在这边的朋友，凡是来到阳朔的人，只要他一有时间，他就会再来，不止他来，还带朋友过来，这就让阳朔的客人越来越多。再加上我们的网络。我们的网络是搞得第二早的，我当时在阳朔县的教育局，96 年，那时候全国是没什么网络的，我们写了个“美丽的县”直接拨号至南宁那个方向。那时候那个（学校）房子都很老，这个地方（学校）有网络，老外就觉得很吃惊。后来网络发展比较快，阳朔网络走在全国的前头，现在一些包括四星级宾馆，他们首先要搞的就是网络推广，很偏的地方包括那个一号大院，那么远的地方，完全是靠网络。网络再加上个性化服务，外国人为什么情况很好，我认为他们的服务非常精到，他们经常在想客人需要什么东西，他们经常在问客人需要什么东西。我们中国人呢，把东西给他们就不管了。总的来说个人认为，客人的想法很重要，接下来的发展包括我最近在网上看到的叫个人定制。个人定制服务，在网络上是比较火爆的特别在阳朔，未来的发展方向，包括我本人准备在这两年投资酒店，也就是要保持个性化服务。我想了一点，例如说酒店比较偏，可以做打包服务，远的话把交通工具配给他们，你来我这里住宿，你需要单车我给你单车，你需要电动车我给你电动车，你需要小车我给你小车，全配给你。交通工具无障碍了，本来阳朔这个

地方就很小，像我今天就是开电动车过来 15 分钟，江湾酒店到阳朔也就是 15 分钟，那个大转盘散步到西街也要 15 到 20 分钟。

（孙老师：你那个修学旅游的特点是什么）

修学旅游就是利用阳朔的外国人，学生到我这里上完课之后，他们马上就可以操练，有组织的，我们会教他们怎样去操练。就像前面讲的，我们要怎样跟外国人去交朋友，我们上课的时候告诉他们，去跟外国人交流的时候一个要点就是聊旅游计划，你知道旅游计划之后，就像我早上跟 ROLAND 见面聊天，聊天之后我知道他晚上要去哪里吃完饭，8 点钟，好，8 点钟我又去见他，ROLAND，nice to meet you again。那要再问他，明天你要去哪里，要去踩单车，那我明天也去踩单车。踩单车，又见到你了。你这样一搞，那就变成朋友了，你只要跟同一个外国人交流两次三次四次五次，你的英语水平才能够提高。如果是一个陌生外国人的话就变成你去哪里啊，很高兴认识你，去过哪些地方，谈一些最基本的。第二次谈的话题才能提升你的水平。

（孙老师：供你交朋友的外国人有多少。你要跟人家说吗，你要不要跟这些（外国）人说）

欧校长：要往这个方向发展，我们告诉学生要往这个方向发展，比如阳朔那个“雾里酒吧”，那个老板就是在阳朔待很久的，没事做的，天天就要找人聊天的，那我们的学生也需要聊天对不对。

（孙老师：他们不同意，他们事很多）

欧校长：他们是老板，他们不忙，在阳朔常驻老外已经有 100 到 200 号人了，一天没事做的，就是喝杯咖啡，relax。

（孙老师：常驻的外国人大概有多少，在阳朔）

欧校长：应该在 100 到 200 人左右。•一号大院，完全是靠网络，啊•••••• 网络再加上什么啊？前面叫个性化服务。啊外国人为什么叫••••••，他们的服务，非常精到，经常在想，客人们需要什么东西，啊•••他们经常再问，客人需要什么东西。啊我们中国人嘛，给你一个东西扔那儿就不管啦。你这个东西总之客人认为，••••••要依据客人的想法。所以接下来的发展包括最近我在网上看的那什么就是个人定制嘛。啊。个人定制服务，对那个网络是比较红火的因为网络上应该在阳朔啊未来的发展方向包括我本人啊我本人准备这两年的投资的酒店，一个是要保证个性化服务，啊那我想到了一点啊，就是说那个你的酒店比较偏，可以打包服务啦。你说这个稍微偏的地方你说这个打个包，把交通工具配给他们，啊比如说你的酒店在杏山路，你就要吧你单车，你在我这里住宿酒店，我你需要单车我配单车，你需要电动车我配电动车，你需要小车我配小车，我全配给你，那就便捷什么？你酒店虽然在杏山路，就变成在西街的酒店了。啊对不对啊•••••• 你交通工具无障碍了，距离，本来阳朔这个地方就很小嘛，你像我们今天来这个酒店你看我看着时间，你看十五分钟嘛，你看江湾酒店到阳朔西街电动车也就十五分钟，啊那你散步啦那个你在西街，你的那个•••散步到西街也要十五分钟，20 分钟，啊。

孙九霞：那个你，你那个现在修学旅游的特点是什么？

欧校长：修学旅游的就是神马？就是我们啊利用阳朔的这个外国人，啊，除了我们对••••之外，外国人啊学生到我这来上完课之后，他马上就可以怎么样啊？操练。

孙九霞：啊。就找外国人去练了。

欧校长：对，马上一个操练。

孙九霞：这是有组织的还是•••

欧校长：对，有组织的。

孙九霞：啊•••

欧校长：啊我会叫他怎样地操练，他的前面讲了嘛，要怎样去跟外国人交朋友。他没交朋友的话那没价值嘛，我来上课的时候怎么上呢，你呀你去跟外国人的聊天的时候，你一定要注意一个要点就是，聊旅游计划，travel plan，你知道旅游计划之后，那就是说我跟那个 roland 的，我跟他早上见面之后，聊天，我在聊天过程当中我知道晚上他晚上这个怎么要到 kitty 吧去吃完饭，8 点钟，那好啊我 8 点钟我先找到 kitty 吧啊 roland！you're here, nice to meet you again，那就什么？第二次交流，那就问他，明天他要去玩了嘛他要去踩单车，那我到那里玩的，那我也去踩单车，那踩单车又见到你了，你这样一直搞，那么你就会变成朋友，你只有把同一个外国人，交流两次三次四次五次，你的英语水平才能够提高，你一直•••一•••一见一个陌生外国人的话，就变得你是那里啊•••很高你去过哪些地方，谈最基本的，那你不可能第二次再谈同样的话题，那怎么提升你的水平？啊•••通过这样同样我们告诉学生•••

孙九霞：但那个给你的、供你交朋友的外国人有多少啊？

欧校长：那就多啊

孙九霞：呵呵

欧校长：阳朔本来就是个•••

孙九霞：不是，你要跟人家说吗？

欧校长：诶？

孙九霞：你要不要跟人家说？

欧校长：你从这个方向发展，啊，我们告诉我们的学生首先我们，比如说阳朔有些那个什么，屋顶酒吧，屋顶酒吧那些老外都是在阳朔呆很久的人，都是没事做的，天天就在找人聊天的，那我们的学生也需要找人聊天（全场一起笑 O(∩_∩)O 哈哈哈~），对不对？啊那些屋顶酒吧的地方一般是很偏的地方•••

孙九霞：他们不同意，他们•••事很多•••

欧校长：他们的老板，他们是忙，但是很多那个客人，那个阳朔呆的在阳朔长居老外已经有一百人到两百号人啦，都没事做的就是怎么啊？就是•••，relex 聊天的。

孙九霞：常住的大约有多少，外国人?

欧校长：应该在一百到两百人左右。

Roland：唔，不到，80.

欧校长：80，但是现在也多了。

Roland：但是也还有台湾还有香港。

孙九霞：他，包括港澳嘛？

欧校长：对。

Roland：大概一百。

孙九霞：大概一百左右•••

欧校长：对。这些外国人就很多嘞，啊•••暑假就更多了，暑假哈，那些老师，在全国各地教书的老师，净跑到阳朔来度假了，啊度假了，啊，所以说我想呢把阳朔的旅游今后呢应该往这方面发展就是呢啊就是啊这种文•••

孙九霞：就你来看，你这个企业遇到的还是比较乐观的，就是比较成长性比较好的？

欧校长：对，对。

孙九霞：因为大家对应于的学习的这个需要啊•••

Roland：对

孙九霞：推动了它的这个发展，它没有做大的问题。

欧校长：没有，本来就是没问题。

孙九霞：还要向酒店扩张

？：但他这个行业的话，目前的话也遇到瓶颈了，现在长期学得少了，对长期学得少了

欧校长：这个需求的，还是这个需求。这个问题就是，阳朔本地人，他不需要学习，阳朔的消费有点高，外地人他要过来，他要花很大的决心•••

孙九霞：成本•••

欧校长：很大的决心比如说我们那个成年人学习的话，他需要把他的工作辞掉，他再来学，学了以后，他那个担心学不学得好，学好了之后再回去找工作，这个事情，你没办法坚持工作，你坚持工作，现在消费越来越高，啊•••

孙九霞：嗯•••

欧校长：这就是我的一些观点了啊•••

孙九霞：哪位•••

李莎：我来说了•••我跟阳朔结缘（孙老师：呵呵呵），是从卖酸菜、卖包子开始的。呵呵，很可怜呵。当初的时候是老外进入店，去买包子，买一些小吃的东西，然后，我只能用肢体语言，去跟他们交流。比如说，比数字啊，比如说，写啊，用笔来写啊，只能这样。然后慢慢地，就像欧晋一样，跟他们交朋友。第一次买，然后第二次又来买，然后就变成朋友啦。然后，我的语言，就逐步逐步地提高了。从 83 年，开始，结缘的。但是，今天呢我想说的呢，是阳朔那些，中小型酒店，这个转型。阳朔现在开放了，我说三点吧，开放已经三十多年了，但是阳朔要持续性发展，转型也是必须的，也是必要的，现在大家也看着，阳朔这些个性酒店啊，就是欧晋也说的这些定制化酒店啊，定制化的，私人定制的，都在转型，但是第三点我要说的，就是这个含金量啊，就说，他们里面的装修，他们那个床，现在，那个床，席梦思有多厚，那个洁具是世界名牌的，三个顶级的，现在就是它那个含金量有多少。

孙九霞：标准•••

李莎：标准！客人的需求。

欧晋：对。

李莎：这个是，还有些，现在阳朔主要的这些中小型酒店，说实在的，就是外观，非常吸引人，哦，跟鼓浪屿差不多，哦，很，但是一进去，一进去它们就被比下了，哦，席梦思这么薄，人家要的是这么厚，而且洁具啊，用的啊，也不是它们心目中所希望的，这就是真金白银，它们需要的真金白银，跟他们你的价位，成比例，还是还有一点更重要的，就是服务，它们刚才也说了服务，诚信、服务、价格，这一点，也是体现了他们的真金白银。我想可能我说的就是这几点吧。

？：很重要的观点啊，诚信、价格、服务，关键词。

孙九霞：但是，你目前的就是说明，比如说，我在提高品质的时候，我需要更大的投入，对吧？这个需要。另外呢，那个服务，现在服务员的这个来源啊，这个诚信啊还有流动性啊这方面是什么状况？

李莎：在阳朔，说实在的，都是员工炒老板的鱿鱼，没有老板炒员工的鱿鱼，说实在的，非常非常用心的对他们•••

欧晋：对对，这个像客人多了随便弄一下他们带个客人•••

李莎：以前他们我们给他们规定，严格的规定，以前的规定破坏一点，或者说，在账目上或者在做事上或者在说话程度上，都可以随时炒他们的鱿鱼，但现在都是他们来炒老板的鱿鱼啦，他们要耐心说他们，我要怎么耐心教会你们，你们以后怎么样在社会上才能更好地发展，发展你们自己的事业，很有耐心地区说服他们。

孙九霞：嗯，那这样的话看来还是当大学老师好一点，老师就是理直气壮地去教训他们，你们就不行。

李莎：不行不行•••

？：现在是•••

孙九霞：流动性很大？

李莎：嗯，流动性很大。

？：中国的这个结构•••

孙九霞：因为是为什么是，是因为他跳了他选择性太大了吧？

李莎：选择性太大了。

？：他不只是选择性太大，他真的是这些人他不想干活。

孙九霞：不想干活，90 后的这个代沟、代际差异。

李莎：90 后，80 尾 90 后的这些•••

莫高阳：其实我看这是计划生育的问题，计划生育你都知道一对夫妻只能有一个孩子那还不当他宝贝了。

孙九霞：哦。那这个状况各位也都会去外地跑吗，就是阳朔会更严重呢还是全国差不多？

？和欧晋：全国差不多。

欧晋：就拿培训这个事情，就拿培训这个事情讲这个事情不再是按资格来管人了，就是感情，如何管 90 后的员工，如果说你•••的感情••

李莎：还有兄弟，兄弟，哦•••

欧晋：你就让这兄弟•••你要知道他的性格、他的管好这个人必须对这个人的性格了解，这钱你就不收你的•••他一分都不要你给他一千块钱他•••不要不要•••就走了。

孙九霞：他要开心、要自在•••

李莎：而且现在特别他们玩网络、玩游戏，有时候，只上夜班的我们是不允许玩游戏的，但是监控，我们经常调监控，第二天就录下来了，然后一看，你昨天晚上玩了游戏不？怎么办？（静）那你炒我呗。（大家笑得乱七八糟）就是一句话，你害怕找不到人，你敢炒他？

欧晋：之前网上传的比较热的就是那个，那个老板组织那个员工一起看那个世界杯，还叫美女来陪着。（笑）

孙九霞：那现在那个服务员的来源是哪里的？阳朔本地的呢还是桂林以内的？

李莎：我的基本上本地的（其他人：本地的），但是•••

？：我•••本地的•••一点，而且还有一点亲情感。（乱哄哄一阵）还有一点亲戚关系他没有那么•••

孙九霞：现在就是内部管理和服务品质提升的这样的一个压力。

李莎：对，就是真金白银才能够看得到•••顾客需要的•••我们•••也是•••

孙九霞：顾客呢•••

李莎：顾客呢，你非常能干，是吧？你非常能说、能说会道、会算，脑袋非常灵敏，但是顾客需要的，非常舒适、非常优质的服务、非常诚信的•••

孙九霞：目前，就是游客这一块是什么状况?是团队的好一点还是散客的？

李莎：但是我现在城内的好像现在是团队，老外跟散客也有，散客主要是内宾，团队，以前我的是•••

孙九霞：你的外宾现在多吗？

李莎：基本上也是蛮多的。

孙九霞：占多少啊，外宾？

李莎：今年可能要占到，三分之二。

孙九霞：哦。那还是比例很高哦。外城会好一些是吧，这个？

李莎：但是现在外团好，怎么好呢，就说我们的利润肯定下降了，肯定下降很多啊，因为怎么呢，他知道的，我们都做外团生意。

？：外团，是他们的生活的习惯比较好，就是对•••虽然说，这是同样一个团，一个外宾团，一个内宾团，你做内宾团的你得换掉很多东西，做外宾团的话•••

孙九霞：就设施的保养方面•••

？：对保养方面，所以稍微便宜１００块，也无所谓。

（两个人讨论，内外宾待遇一致）

孙九霞：差不多。

李莎：差不多。只不过你外宾住，内宾住不下了，对。

孙九霞：那你们在经营中，服务员有没有面对你们的这些问题？

Ian:嗯，有。因为我的酒店是在？那边开的，离阳朔 7、8 公里，不容易做，你看阳朔有那么多酒店，服务员要找工作，去西街看一下，这里、这里、这里都可以所以他们不要来我们那里那个村里面，所以我们是要给钱给多一点。另外他们

经常就说从阳朔去的话要花的钱什么•••

孙九霞：很多。

Ian：所以晚上上班他们要在我们那里睡觉他们说不太舒服。然后有一个小问题我跟他们聊天，说啊这些东西不是放这里而是放这里，他们生气了。我也是跟一个当地人合作我们两个人开了一个酒店然后他说啊你不要跟他们说话不要跟他们生气说他们怎么知道•••他说他们生气他们走了明天去另外一个地方。所以他们知道是哪里都可以找工作所以

孙九霞：工资高一点有优势吗？

欧晋：工资高低有一点点优势但是•••

李莎：不是绝对的•••

？：一般都是一百到两百块钱不一样而已嘛•••

欧晋：对。

孙九霞：哦•••

Ian：因为阳朔有那么多酒店都是找服务员，如果就是说那边就是非常不好，我们就说哦你不会当服务员，走了，那明天他们也可以去另外一个地方去。

孙九霞：哦，走了。

Ian：有人给我打电话说这个在你那里做过工作怎么样•••

孙九霞：没有人了解。

Ian：对对。

孙九霞：那么从一开始是怎么样子来到阳朔的，如何去做这些事，这些年你感受到的阳朔的变化是什么？

Ian：em•••我第一次就是 2001 年来到阳朔，我就是当一个导游、外国游客的•••

孙九霞：那个国家的？

Ian：是一个英国的旅游公司，大部分都是英国的、也有欧洲的、澳大利亚的、美国的•••可能大部分都是英国的。经常就是两三个星期在中国旅游，我每天就是带他们出去吃饭都是吃中餐，不吃西餐。所以我们来阳朔，2001 年在中

国没有那么多人会说英文，所以我来阳朔我自己很开心他们也很开心因为他们可以去吃西餐，他们可以自己，不需要我带他们去，所以我经常带他们去陆华平那里因为这是我在中国第一个人，认识的，所以我说你们可以随便，你们要吃中餐吃西餐，都可以•••

孙九霞：都可以。

Ian：因为他的英文也很好所以我们也就非常好，那时中国人很少，就是外国人比较多，西街也有几个咖啡厅、几个酒店，没有那么多，也不那么贵，后来就是慢慢，因为 2001、2 年有中国人来，就是来阳朔，因为要看外国人，要试一试西餐，不能去外国旅游所以他们就是来阳朔看一看外国人，吃一吃 pizza，觉得很好玩，然后又有学生大学生来阳朔学英文，后来就是中国阳朔越来越有名，或者是说有越来越多中国人来，那就是很快改变，就像西街你要住•••住房子，2001、2 年很便宜，还有很多人还是住在西街上，不是全部都是做工作，那后来就是很快•••就是那个很快•••那个租金很快•••

孙九霞：暴涨。

Ian：对。然后就是现在我觉得就是现在在西街，我觉得可能不会赚钱。因为要花很多钱，我那里就是要装修，我住的那个老房子装修，一个工人，4 年之前，就是一个工人 50 块，现在 140,4 年就是工资从 50 块到 140 是超过了两倍。2001 年那个像服务员也是 3、400 块，现在 2000，所以就是什么都贵一点，在西街这里•••很难赚钱，因为一个月那个租金可能 3、4 万，然后又服务员就是•••

孙九霞：那个 lisa 那个店她在西街有个店你还有吗？租出去了还是？

欧晋：现在没有了，就是不干了。

李莎：就是一起做酒吧。

孙九霞：就是租给别人做酒吧？

李莎：一起做的。

孙九霞：现在呢？

李莎：现在也是。

孙九霞：很吵的那种吗？

李莎：对。没办法了，我已经忍耐了两年了，我是最后撤出西街的。

孙九霞：受不住的这些。

李莎：守不住了。因为太闹了。你知道我四点钟，那客人一个团队住在上面，然后凌晨四点钟，又要搬房。然后搬到哪里去我这里又酒店满了，另外一个酒店也满了，搬到哪里去？我头晕啊，后来那个团队 4 点钟硬要搬，我每个房间自己贴了 300 块钱给他搬到市区的酒店里去了。每个房间。

孙九霞：所以你也就你也吵了，大家都•••

李莎：没办法。

Ian：我也以前就在阳朔滨江路，差不多 5 年也就 5 年多，最后两年睡不着觉，真的很漂亮那里因为早上太阳出来我看那个山水，就是晚上睡不着觉。我就是搬到外面，到农村里面，我现在晚上睡得非常好。

Ian：就因为她开了酒吧•••

（一大堆人笑）

李莎：I'm the last one… Be careful. You're strong I'm strong.

（一大堆人笑）

孙九霞：那你后来是怎么样说不当你的领队了，就留在这里做生意？

Roland：噢~我是 2 年当领队，后来那个英国的旅游公司，他们在中国的办公室是在阳朔。所以我是在那里当副经理，所以我是住在阳朔。过几年他们叫我当经理，但是我觉得非常不好玩，天天用电脑，我受不了。另外，我在那边当建筑师，我准备租了一栋房子，我都要保护。

孙九霞：在哪里租的？

Roland：在御龙那边。

孙九霞：旧县那边。对对对，你一开始只是想保护？

Roland:是，我就是想要租一栋房子，因为我自己没有地方住了。

孙九霞：哪一年？

Roland：那个是 4 年之前。10 年。然后那个是很漂亮的房子，真的很漂亮，我就是准备自己装修，后面还有一栋稍微破坏了靠山的，怎么说如果我住哪一栋，那个山也给我用。那一栋破坏了也很便宜，那个也住。但是那个租金，我住了 20 年，他们让我一直付。因为那个大的房子有六家房东，后面那个有三家，总共九家房东。所以他们说一年一年付的话，那个钱都是很少。所以我付完了，还有 700 块。

孙九霞：一共多少钱？你付个他们那个。20 年。

Roland：后面那个房子是 1800 块一年。20 年就是 3 万 6.。前面那个是 6000 块一年。

孙九霞：但是 20 年以后就是很可怕了。。

Roland：后来我付完了自己没有钱。我是帮一个朋友，她是本地人，她的老公也是外国人，英国人，我当副经理的时候她是当经理。

孙九霞：是旧县的吗？

Roland：不是，是福利。她是让我帮她找个房子，她要开酒店。所以我是帮她忙，我说那你也可以帮我写个合同，因为这个很重要。所以我们是在互相帮忙。

孙九霞：你俩合伙吗？合资吗？

Roland：现没有。

孙九霞：是你的现在那个是？

Roland：没有没有，因为我只是准备住在那里。后来我住好了，我跟她说你要开个酒店。我有两栋房子，没有钱。那我们可以合作，开个酒店。所以她说。。

孙九霞：那投资是她投的？酒店的投资？

Roland：是我们。。她从银行贷款的。因为在阳朔有房子是。。

孙九霞：现在投入多少钱了？

Roland：我不知道。我真的不知道。

某人（男）：保持点商业机密

孙九霞：秘密方面，可以不知道。。

Roland：不是，因为我租好了两栋房子。我们只是从银行贷款贷了 55 万。我知道那个钱不够。所以我们也是从朋友借了钱。也是借了 20 万。但是后来我不知道了，因为我们就是用那个钱装修好两栋房子。后来就是慢慢赚钱再租。

孙九霞：我昨天去看了，非常好。就是你是做建筑师的是吧？

Roland：设计的

孙九霞：所以做得非常好，大家也可以去看一下他那个秘密花园。那个空间用得非常得好。内部空间和外部空间得结合非常得好。很破的房子，但是做得很好。并且它主要是靠那个山很有价值。那个有地形，很好。

Roland:恩，后来是我们慢慢赚钱慢慢租一栋装修，所以我也不知道。

孙九霞:那你现在觉得最大的问题，就是最头疼的问题是什么？

Roland：是天天都下雨。我现在装修一栋房子，2 月份，那个瓦全部都滴下来，我还没搞好，因为天天都下雨。

孙九霞：现在那个游客不会发愁吧？房客？客源多吗？

Roland：我觉得今年 7.8 月份没有那么好。我们从开业，我们的生意越来越好。我们开业是有六间房，现在是有十一间。所以我们就是每一年房间多一点，客人也多一点。但是今年 7.8 月份订的房间的客人比去年少得多。

孙九霞：什么原因呢？他们好像也是。都是国外游客吗？

Roland：我们也是三分之二是外国的，三分之一是中国的。那今年就是外国人少得多。我觉得有几个问题，一个是那个签证不容易办现在，他们已经订好房间，他们来这里我们要发给他们，所以是麻烦一点。然后，我觉得另外你看，外国人在外国看新闻，今天他们看中国有很多问题。

孙九霞:不安全。。

Roland：希望他们觉得今年不来明天来。就是你看新疆有问题，去火车站不安全，中国跟日本越南都有问题，北京那里大城市的空气污染。所以也是天气不好。今年没有去年那么好。所以都有很多小问题。所以都在一起成了大一点的问题。

孙九霞：跟周边那些农民的关系还好吧？他们还好吧？

恩。。谈谈那个不是开店的吧？户外的，攀岩的吧？

西唐：恩，我说的第一个是攀岩，第二个就是所谓的户外旅游，我们做的是竞争的市场。第三个谈一下赛事旅游，节庆方面的事情。我从第一点介绍一下，阳朔是中国的攀岩胜地。我不知道大家知道没有。但是这个在世界上是很有名的。我是 2000 年开始在阳朔攀岩，最开始的时候只有 30 条线路。但是到了几年 2014 年有 1050 条线路。然后这是在国内数量最多的。

孙九霞：阳朔的？旅游局还不知道呢。

西唐：就是在现在大环境下，我们说的传统旅游、观光旅游，我们做的是体验式旅游。就是很多人现在已经升级转型了。就是传统旅游就只是去看景点，就是没有参与感。现在比较有名的爸爸去哪儿，做一种户外探险和素质教育的。刚好我认为阳朔的传统旅游产品已经发展到了一个极致了。但是你看，我们阳朔资源很丰富。攀岩就不说了，攀岩胜地，全球知名的。然后我们有四大徒步线路之一，阳朔到兴坪这一段，是中国最早开发的、也是最有名的一条线路。然后我们漓江上的皮划艇，自行车，不是普通人坐的车子，比较高端一点的。然后我们比较好的项目，像这边做的太极拳呀或者是武术，还有定制化的 SCHOOL。这一块呢能让参与者有更高级的享受。同时我们也发掘了更多产品，去做农活啊这一些。总之我认为传统的旅游需要更新换代，关键在于做体验式，体验式很注重就是户外，在阳朔是占了绝大部分的因素。除了那种文化之旅、摄影之旅以外，户外之旅也是非常好的。然后我们通过，大概是，因为阳朔是有个故事的，中国第一条攀岩线路，世界攀岩大师来到阳朔开了第一条攀岩线路，然后到现在大概是 23 年了，开发了一千多条线路。所以说，我们觉得这个是值得这个阳朔自豪的、值得宣传的。每一年来自世界各地的旅游者非常多，

然后阳朔也是背包客的胜地。所以说在这种攀岩非常良好的环境下面，然后 08 年的时候我就组织了阳朔职业俱乐部，这是民间的联合会。然后我也操办了第一届的阳朔攀岩节。然后当时是 200 人，第一届人比较少，有 100 多人，但是我们参与的品牌是跨国品牌，就是一线的品牌给予我们强烈的支持。然后从第一届的 100 多人，到去年我们是第六届，

孙九霞:每年一届？

西唐：对。然后影响力是非常之大的，然后全国很多旅游地方，想学习这里旅游的都会想来阳朔。而去年，现在来说我们大概是一千多人。但是我们的网络推广、形象提升对于阳朔我觉得起到了功不可没的作用。而且我们每天的数据比较精准，通过影像还有照片，还有跟全国这种攀岩俱乐部的对接。然后把阳朔提升一种，我认为是新的形象吧。不仅仅有传统的观光旅游，我们还有户外的体验式旅游。而同时他们来到这里的时候，我们也会安排一些徒步呀之类的体验式旅游。我认为这种客户型比较高端。总而言之，可能受益的是在座各位，可能开酒店也好，开客栈也好，或者是在西街上的那种一条街的餐馆也好，我认为是非常好的对阳朔。然后攀岩节，今年的我们还是在筹办，就是攀岩节以及攀岩协会也得到认同，还有中国最大的户外品牌他们也全力支持。我们跟全国户外联盟，俱乐部和户外网站达成了一定的合作意向。所以说，我希望如果政府这方面把这个提上日程的话，让更多人知道我们已经在做这个事情，宣传出去也好，攀岩方面的心得或者户外旅游的提升。然后我现在说下第二点，阳朔不仅仅只有攀岩这个资源，我觉得攀岩者也是什么运动我都做。所以说我做运动的时候也去参加这种全国各地的赛事呀，邀请我去做裁判运动员之类的。所以说我觉得阳朔的资源可能还适合做一个马拉松，这样的话可以体现阳朔的风景，但是这一块的话还是需要当地的企业支持。所以说最近一段时间我们在跟旅游组织沟通的时候，我就产生了一个想法。我觉得我们，因为阳朔有这个中西方文化的交流嘛，我们实际上可以做一个国际嘉年华，就是以阳朔来命名。这样的话把全城做成有代表性的，像青岛那样，一个啤酒节一个狂欢节。阳朔的话我们可以做酒吧节，然后攀岩方面的有马拉松方面的各个方面。让全城狂欢，我们在一个稍微比较淡的淡季，让大家有一个理由过来玩。因为大家现在不缺钱，但是缺的是噱头。就是以前我去某个地方，我要等到有假期，我有钱了。但是现在你让我去一个地方，我举得要有一个噱头我才会去。我随时可以飞过去。我们可以把那个赛事称之为赛事旅游也好，节庆旅游，节事旅游也好。就是把这一块做好。因为在座都是做企业的，尤其是中西方文化。上次我发言的时候，我写了一个，就是把这东西做成一种旅游周也好，就是我更希望取个名字就是嘉年华的模式。这样的话我们就有噱头，让更多的人关注阳朔。然后无形中就能让在座的都受益。我现在在做一个，我通过户外方面，因为我在本地只是做了一个攀岩节。然后我在其他方面，比如说是张家界的旅游节请我过去了，做一些调研以及西藏旅游节，我们成功合作的新的希望。西藏旅游节也在请我去做一些户外性质的。所以说我认为阳朔资源是非常好，但是没有合理的利用。如果把它合理利用得比较好的话，阳朔会上一个台阶。然后我也举个例子，那个张家界做了很多年了，那个天门山。比如说玉门飞星也好，穿越天门道。然后现在开通了张家界号列车，就是前两年开通的。然后我觉得我们马上高铁要开通了，我希望做下事件营销，用事件。比如说只要你持这个车票我们免费给你，然后这样的话会产生轰动效应。让外界，整个旅游界，或者中国，网络媒体报道、宣传。然后形

象也提上来。因为其中提到一点门票不用花钱。因为你，如果你是去做广告的话，可能话几千万几百万。但是这个事件一报道的话，可能就是一种轰动效应。所以这一块的话我就是建议可以做。我在跟拉萨旅游局，他们谈到一个，就是通过大型的事件营销，阳朔的节事体验它都是属于一个事件营销。我们有一些，就是跟威廉和 LISA 他们讨论了一些方案，就是希望旅游局通过这次会谈能够实现。因为这种是花小钱做大事。在我跟，尤其是今年是中法建交 50 周年的时候，阳朔跟法国的一个城市安拉十一市结成了友谊城市。。。

西唐：(…结成了友谊城市)法国文化是高山和户外文化，然后阳朔呢通过现有的资源，然后也是攀岩胜地，户外资源非常好，老实说我在跟法国大使那边，就是户外部的一个同事，他们认为阳朔/西藏是可以做一个户外村的概念，就把发过一些高山的文化，然后移植到阳朔，然后向法国那种户外电影节也好，高山培训体系，也在阳朔。因为法国那边有些项目非常适合在阳朔做。通过这种文化输入，让阳朔更好，让全国人民更好地学习。现在加上有些认证嘛，这样的话会提升的比较好。至于其他方面，传统旅游，我也没什么意见，我只是希望大家能宣传一下，因为都是阳朔人嘛。

孙九霞:新阳朔人。

西唐：那我说完了。

孙九霞:那个，下去户外这一块的量有多少，市场的量有多少？它的走势是什么样的？应该是不是越来越多？

西唐：我觉得是这样子的，你问的这个问题就跟政府问我的这个问题是一样的，你只是那一点点的，你交的税…

孙九霞:不，我不是说这个。我是说它走势，我不是说它的绝对量，我只说这个走势，我是说这个趋势。这是不是个消费趋势？

西唐：消费趋势是很好的，因为在中国其他地方旅游胜地都打户外牌，阳朔有户外反而没有打户外牌。

孙九霞:对。

西唐：说真的我觉得被忽略了。

孙九霞:所以我刚刚在你一说是攀岩胜地我都很吃惊。我对阳朔这么熟，因为阳朔从来没拿这个说事。我知道阳朔攀岩很不错，但我不知道它是一个国际的胜地，就到这个程度，那就说明我们的营销有问题了。

Sam：在中国一定是排在第一位。

西唐：对对对，在中国排在亚洲的第一位。

孙九霞:亚洲啊。

西唐：政府担心一个问题就是，攀岩是高危运动。所以说我们做了这么多届，影响力在全世界都是有的。这个我也比较政府知道，因为大家那个。

孙九霞:我觉得不是这么那个，因为张家界我特别熟悉了，张家界的营销就是要借助这个事件营销。你看它的一桩飞行都出事都跌死人了，它也没事。

西唐：因为它的保险很完善。

孙九霞:对啊，因为那是意外，那只能是意外，那不是说我阳朔管理不好出了什么，其实是不是，那是另外的东西。应该是这个形象，因为你现在阳朔变成了，我说句，我这两天特别，特别难过。就是看了西街，看了遇龙河，我觉得真的是，我不知道用什么话来说。并且现在再叠加上增量的东西，让人很着急。不会是没有特色，它是低端特色。你看到说收几块钱，冒出些乱七八糟的东西，那是那种。还有就是乡村的演化，乡村的建筑的这种，直接就是一个疯狂的生长，很奇怪。像这个东西呢，当然我跟学生不是这么说的，我说的是，其实今天在座的各位，就是阳朔能吸引到大家有它的理由。另外呢，阳朔也因为有你们而更像阳朔。但是未来我们能不能把这些好的东西越来越凸显，至少把那个量在结构上优化出来。像这样子呢，我觉得这些旅行家可能还是蛮重要的。山地，你刚刚说那个山地自行车有这样的线路吗？

西唐：有有有。

孙九霞:像西方的山地车那种啊？

西唐：线路都是可以。

孙九霞老师：可以的哈。

西唐：另外我在想，做攀岩方面，可能是做了这么多年了，大家有点担心了。所以我提的概念就是，国际嘉年华，像 Sam 那边的一条街，和整条西街。另外我跟很多那种，因为我在阳朔十几年了，从更方面我们在同一起点提供免费的，或者是张灯结彩的有那种氛围。还有我们在大西街，其实阳朔是个露营点比较好，比如说沙洲，我们做一个千人露营大会，然后在对面弄一个美食街，各种各样的做起来，甚至像胡校长这样的，我忘记说了。

我是 97 年来参加胡校长的华克兰学校。

孙九霞：所以你还是他的学生。

西唐：我认为攀岩节可能稍微偏远了，如果我们做国际嘉年华，让每个人都可以参与到，然后通过这个事件营销的效果，到了未来可能说一年有四五个节庆，可能到了年头有一个大的节庆，这样的话人们就更容易知道阳朔了。我们提供一个很大的平台，每个人都愿意去推广。

孙九霞：Sam 很支持，Sam 说

Sam：这个我很支持，概念很好。比方我们可以从一月到三月底，每一个月都有活动。比方我们做酒店的，连续两天投宿同一家酒店，比方呢，餐厅给一些 charge 给他，餐厅方面可以给他优惠，但是住必须是两个晚上。就从 11，

12 月，反正春节就会用了。旺季的时候肯定商家就不会愿意参加，但是淡季的时候我们就把活动办出来。但是我是很反对降价竞争的。你降价利润就低了，客人的要求就多了。还有低档次的客人就越多，价钱我是全年都一样的，但是你把价格搞低了。住三天付两天的钱，我们做不到。

西唐：我觉得这个 idea 非常好，我们现在做的都是微信营销，然后我们把这个嘉年华，比如说攀岩节也好，马拉松也好，啤酒节或者西街美食节，然后再加上一个阳朔酒店节，各种各样的节庆我们把它造出来，然后把它做成一个非常大的事件。在淡季的时候

Lisa：还有篝火节啊，火把节啊。这些之类的，对吧？

Sam：我觉得像 383 酒店，我那边的餐厅，只要是酒店允许，中间还有什么占座的。现在的政府部门很好讲话，现在如果你不挡道也不会清你，对不对？我认为可以，去年就可以开始了。

西唐：我们现在在做这个策划，可能下一步会在做规划。

Sam：比如说你那个时候有个好的品牌，有些好的表演人流量不是问题，比如说什么酒店有优惠，吃东西有优惠，搞活起来。因为这个是非常好的。

Lisa:嗯，这个确实非常好，阳朔的酒店淡季的时候确实不好。

支持，这个支持。

黄局长:这个我也不是领导，但是我们平时也做这个宣传促销，但是这个特色方面确实不足，在例如口号打造方面仍然有一些空间。

要记住牵头啊，牵头。

Sam：是啊，3，40 个餐厅就可以搞得不错。一条街啊，比如新西街，桂花路，桂花路也是可以的。冬天的时候，政府要把它搞上去。

西唐：别的村庄过来把桌子搬出去。

黄局长:其实有的活动由政府主导民间参与这种方式可能挺好。

对啊对啊。政府要牵线。

Sam：我还没有讲完，西唐你可以搞个计划出来，那么多主意。

西唐：我不是领导，我现在是普通老百姓。

Sam：你要有计划，引导不同的酒店，不同的村庄在参与的情况之下，跟有关部门进行沟通。我认为可能性很大。攀岩方面你保险要买的很足。像上次那个热气球，摔死了四个人了。可能以后就终结了。

Sam：政府有人去做一些工作。热气球是一个很好的项目，是一种高端消费。

Lisa:嗯，特别是在阳朔。

Sam：是啊。多可惜。(西唐)你可以把这个也申请了，我的意思是你可以把这个节目搞起来。

孙九霞:那个要经过军方来批的，空中项目要军方批。

黄局长:我觉得，你可以把这个提议啊，你们应该也要有你们自己的方案，到时候可以的话你们可以给我们一个。

Sam：就是保险完善，然后每一个热气球，它是早上很早起飞的嘛，都有政府和民间亲自的监督，这个项目要签字，他们一定要承担责任。

Roland:那是必须要给绿灯，给红灯就不可以了。但是必须要有人，但是他们都不喜欢负责这个事情，因为如果有问题，他们会说，噢，不做了。

Sam：买保险买够了就可以了。

Roland:就是不准备有问题了，有问题就砍掉了。

孙九霞:叫一刀切对吧。

Sam：你搞起来以后其他地方就赚钱了。以前也搞过了，怎么搞?

Lisa:其实以前那几个在这里飞热气球的老板，他们还很有责任感的。

Roland:但是是他们自己干的，政府不管的。

孙九霞:刚才 William 说他要学黄老板，他要开连锁了。黄老板你开连锁是不是开的很爽啊?

Lisa:一条街都是他的了，我都说这样赚过去都赚到我们那边了，然后等多两年不赚到我们那边我干脆出来算了。

Sam：我讲一下我的看法吧。刚才有人提过就是高铁的问题，其实高铁是一个很大的转机。什么转机呢?刚才院长也提过了，现在阳朔低端的东西太多。我建议大家可以去下鼓浪屿，丽江，可能真的是感悟很多，消费绝对比阳朔高。但是大家都很明白，我们在阳朔做生意很明了。阳朔肯定比它好，我们是这样觉得的。但是现在的问题就是什么呢，做得太烂了。比方你旅游方面，有的导游交 5 块钱就去，有的餐厅就把餐厅价格降下来。酒店宾馆。你要明白，客人来，他肯定要住店的，第一。第二，你越赔你就越麻烦了，这个真的错了。你也赔其实你也做不好啊，都赔的话你怎么能提供好的服务呢。我认为阳朔高铁这个状况呢，是可以作为一个转机的。大家营造一种商誉呢，价钱那方面呢，我认为是可以调的。就算新来做生意的，只要有特色，价钱不要定的太低，因为价钱太低就是麻烦。我讲个自己的经验。我很多年前开了香港茶餐厅，我肯定有那个云吞面，云吞粉。我刚做的时候好像 12 块吧，12 块客人都讲了，阳朔米粉才两块五，你抢钱啊。我后来把它改成 25 块，都没有人投诉。为什么呢，我提供的东西是不同，那么他看餐牌，来他就知道是不同的东西。这个小的客栈就不用讲了，Lisa 她们有经验，就是年轻人他们去弄个房间，你就把自己的

用心投进去，很干净，很清洁，然后就很容易，就是你有没有兴趣做，也可以搞出一片路，不需要很大投资，不要求什么连锁。阳朔有高铁我认为是一个很大的机会，以后做高铁来的客人很多是现在开车的，现在开车的客人旺季的时候，不要说黄金周了，转进来都没有地方停，有地方停收费又贵。但是这些都是很好消费的，以后有高铁，广州过来用不了两个小时，这些都是潜在的消费客人。鼓浪屿真真正正火起来是上海到鼓浪屿的高铁通了，就迎来第一个高潮了。去年深圳也通了，但是它哪里有阳朔方便啊，你到了兴坪那个高铁站，不晓得有没有电瓶车什么的，这个要问旅游局了。你去兴坪的话 10 分钟，你做旅游车去阳朔可能 30 分钟就可以了，这个是非常方便的。可以实现星期五来，星期天上午就回去。所以我认为中高端的客人真的很多，所以我认为这个转机很重要。因为我们阳朔西街，我应该算是第三代了。阳朔那个时候能做的兴旺很大程度上靠的是背包客，是不是?

黄家磊：……01:29:55 我算是刚才陆总讲的，我算是第三代了。

孙九霞：哈哈，第三代，哈哈。

黄家磊：阳朔当初能做得那么成功，很大程度是靠那些 bag-packers，那些背包客。但是，背包客他们的特点：不是家里没有钱，他们很多时候会给自己订一个 budget，订一个预算，我每天就花那么多钱，比如说，有五千元要在中国玩多少天。那你让他们多花钱，是不是就那么烦呢？但是，我们还停留在五块钱一瓶啤酒的时代，现在是什么工资了。所以，现在那个时代过去了，那个背包客他们根本是不同转移的，哪里便宜哪里去。他们讲是讲原生态，而不是讲便宜的嘛。我以前当初来的时候，吃个火腿蛋三文治，那个时候可能也是（一份）12 块。（一个背包客）他说："不要火腿，（一份）要收多少钱"。有时候（问），"只需要半份要收多少钱"。有时候（问），"不要这些东西，需要多少钱"。我们很感谢那些外国的背包客，把阳朔介绍给很多（客源地）不同的地方。但是大家要想一下，少点儿背包客，少点儿低消费的客人，问题不大的。其实，只要一个人的收入、一个人的水平，达到某一个地步，比方，很简单讲一句话，有家米粉店卖一碗米粉是四块钱，这个是大家在座都可以接受的；（如果）旁边有一家（米粉店）卖一块的，我就不敢进去吃了。所以，这个价钱，你们有时间的话，可以去下漓江啊、鼓浪屿的酒店文化做得不错，（这些地方）根本就不需要便宜。我看旅游局很多年前流行一个故事就是讲，有一个客人，他口袋里有五千块，来一个地方玩。他花完钱，回去就讲很好玩。他来阳朔，他可能还有两千块钱回去。你以为他高兴吗？他不高兴。

陆华平：（钱）没花出去。

黄家磊：所以，我做餐厅，我宁可是东西很精，但是我分量不大。这个我是做过实验的，我们呢，做的菜，不能跟那个城市里的餐厅一样的。我们可以做得精致一点儿、用料好一点儿、提供好一点儿的服务，但是分量不能大。他是游客，他点三个菜，跟几个人、三四个朋友，不够饱了，再点三四个呢，他（就）觉得那个里面的东西好吃。你要是吃不完呢，他（会）骂人的，有些（人）啊。"你怎么不跟我讲啊？一份又那么大，我吃不完，这些我不付钱。"

孙九霞：哈哈哈哈。

黄家磊：所以，这些都是你的学生们，是不是啊？

孙九霞：嗯。

黄家磊：我觉得在这些旅游地方做生意呢，酒店也好、餐厅也好，是和城市里面的经营概念不同的。我做了十几年了，在这方面有点儿经验。我发现，我在南宁夜开了家店，嗯，就等于是，你来旅游地方投资的话，你第一，不要怕自己是以前没有经验。最主要是把自己看成是客人，客人是什么特征，你就把自己看成是客人。你就想了，你带着五十块出来旅游，会不会为了省那些钱。你做餐厅，你可以反过来，逆向思维嘛。这些是我的个人建议。刚才是我的小小的意见，但是，在旅游环境上面呢，现在旅游局有黄局、还有其他部门的领导在，我经常都是提几点的，很差的，就是县里跟其他地方比较，（阳朔做得）很差的：噪音、然后就是污染、然后就是洗手间、然后就是无牌兜售。好的地方，就是这些管得好。你看大理、你看丽江，你看鼓浪屿，但鼓浪屿现在也变差了。所以呢，黄局，其实，我们做生意都受着这些气，你投诉一个 A 单位，它叫你找 B，B（单位）叫你找 C。我们跟旅游局讲，旅游局让你找市，说他们没有这个权利；市里又让你找一下环保局；环保局（说）“哈？旅游局让你过来的？那么够兄弟”，又讲“这个不关我事儿，你去找城管大队”；城管大队（又让你）去公安局。所以，黄局阳朔要整治好这个问题，跟县里面模糊（治理）。（阳朔）一定要搞好综合治理大队，是一个持久性的，而不是一个运动。我们这个月就保持干净，这个不行的。但是现在我讲是讲，噪音方面现在是好很多了。但是他们好像有规定是十二点钟离场，我认为，漓江好像是十一点，是不是啊。这么讲好像又得罪人了。但我自己本身在西街（的）酒店开了房间，现在（噪音）算是可以接受了。所以，政府那么多年了，你看，我们（经营）酒店受了那么多苦了。现在总算是迈向第一步。我希望第二步能够管什么呢？那个无牌兜售。然后就是垃圾桶、洗手间呢，要搞好。洗手间怎么会搞不好呢？所以，黄局你们，你看你宣传，对外做了那么好的宣传，（环境）怎么漂亮，大篷车怎么样，（但是）游客来，洗手间找不到，找得到，清洁卫生又很不理想的，这些是最重要的。我去有些洗手间，还给它装空调。你看，你们去鼓浪屿，鼓浪屿的洗手间很多，我看有十几、二十个，免费、永远有人看（守）。丽江的更夸张，我很多年没有去了。丽江的洗手间是一家公司搞的，你进去，（洗手间）自动亮灯，上面有沙发，那些排污是把它变成无害处理，把它用那些细菌，把它（处理掉）。后来我找那家公司的总经理，一个女士，很多年前了。说那些钱都是政府给的，以后还有管理费。哇，我（听得）下巴都掉下来了，那么好的事儿啊。

孙九霞：哈哈。

黄家磊：但为什么我们的洗手间，花了多少钱去搞好，过一个月，领导巡视过后了，这个水龙头又掉了，那个什么又没有了，然后就讲，因为有人拿。那（如果）有人拿的话，就（把它）看好了，对不对。这个是一个门面来的。所以旅游局和孙九（霞老师）要跟县里面反应的。你这些做不好，你怎么整旅游呢？还有无牌兜售，怎么不能控制呢？无牌兜售对很多餐厅啊、对很多我们卖东西的人（而言），是很不公平的。你可以把他们集中在一个地方，对不对。经过这样的处理，好像比如说丽江它将那些酒吧啊，那些吵闹的，它另外有一个地方安置下来，当然，这个肯定是需

要时间。但是你看，现在县政府要搬去了那个，北上那个新区，也是个很好的办法。你说西街的转化，你给它三年时间花转化，（花）五年时间都没有关系啊。你这个要讲道理嘛。人家付了租金、装修对不对，但是可以把他们逐步转移去那个地方。那么（如果）你政府把环境搞好了，我们来投资呢，不单止会增加投资，还会喊朋友过来，都这样子。我很多时候的朋友过来，很休闲，然后讲一下，做生意这上面的情况呢，都说阳朔太落后了，真的不行。那真的是有点儿可惜啊。阳朔那么好的一个地方，是不是啊。所以，现在我们，我九九年过来的，有十五年了。要是，在座有什么想问的话呢，可以问一下，可以点名字，问一下那些有经验的（人），我看对你们写论文也好，（其他）什么的也有帮助。但是我总是想，我从一个人，来到现在，我都觉得阳朔是个好地方。其实有那么（多）不足的地方，还能够做到这个程度呢，变型很有空间。所以……

孙九霞：刚才那个好地方好在哪里？

黄家磊：比如刚才西唐讲，你比如说攀岩、你比如说遇龙河，那么方便，对不对。先不讲高铁，船只是方便的。还有就是，（从）外国人（的角度）来讲，讲英语的文化程度要高一些。还有我想到最近一篇文章讲阳朔，说什么三千块被人宰了，这个我觉得讲了很多复杂的东西。我觉得阳朔呢，跟其他地方比较，应该算是不载客的了。

陆华平：桂林啊，应该是桂林啊。但是，他把它算入阳朔里去了。

李莎：桂林阳朔嘛。那阳朔小嘛。

黄家磊：那就更惨。你说阳朔，90%的餐厅都是只有一个餐牌。

陆华平：他是桂林那些小路上，把游客招呼到一个地方，然后（进行）载客了。阳朔怎么不好呢？

李莎：是啊，阳朔人太淳朴了。我都不想涨（价）。穿烂一点的老外，我都不忍心多收他一点钱。还有给小费也不敢要，刚开始，哎哟，简直是太淳朴了。

黄家磊：把它装修好一点，提供更好的服务。

孙九霞：那是开始的时候，现在可以了，哈哈。

黄家磊：在街上那些无牌的导游……

孙九霞：现在我去西街口，还看见那个什么“保卫钓鱼岛”，那是什么东西呀？

陆华平：哦，那两个女的，她们是找人拍照的。

孙九霞：不是，那个不能弄出去么？放那儿干什么？保卫钓鱼岛和西街有什么关系？

陆华平：那些人是卖噱头、卖身材的。

黄家磊：像我刚才讲的，这个问题是双方面的。一方面是征求我们的意见，另一方面是通过（孙老师）你、通过旅游局，要跟我们县里面的领导反应。

孙九霞：我晚上见县长。

黄家磊：我们是开了会就走的。

陆华平：（孙老师）晚上见县长。我们这是开会及时啊。

黄家磊：我们县长都是年轻有为。有些东西不需要他们马上签字的。比方说西唐，政府不支持，那么我们只能自己做了。做得好，人家就会支持了。

陆华平：这个事儿，先民间做起来，以后政府再来支持。

黄家磊：再担心的时候，很坦白的讲，你住两天，我送你两天，够意思了。

李莎：是，住两天送两天，对这个可以，一共四天嘛。

黄家磊：对，比方说他原来有五天（假），准备去两个地方。他（很可能）不去了，全部在阳朔了。怎么不好呢？大家的生意都好。

陆华平：这个好。

前旅游局张：我打一下茬儿啊，有一些这些做法，通过媒体、电商这一块儿可以做。比如说，你过生日到桂林搞这个噱头，你过生日哪一天入住那里，酒店可以免客房，可以提供生日的礼物。你说的这个方向，阳朔其实是可以这样做的。

黄家磊：其实，旅游局你讲的这个，就是我刚才讲的。在阳朔做生意，跟城市里面是不同的。这个是城市里面做的。

陆华平：我们是要做很多人的活动。我们是要做一个面子。

黄家磊：是啊，比如说（在）阳朔你的生意是最好的，（要）大家都好。原来就 50 个生意，就是那么大个饼。现在把饼做大，就算你（的生意市场）变成 3%、4%也要比以前多很多。所以，这样生意就能做得好。怎么（会）不好啊？我就嫌阳朔的那个个性化酒店、精品酒店太少了。其实像 Roland 和 Ian，他们是在 outside 阳朔，在外地做（酒店）的。我现在在外面做的，没有了。其实，你们可以连锁起来开。就是你们要搞宣传，起码要联合十家，对不对。然后，你们每一个酒店搞一个特色的餐厅，比如说，which country are you from?

Ian：南非。

黄家磊：那你搞那个南非菜。他是搞荷兰菜。就网上你们尽可能搞一个协调方式，住他的酒店，你可以有一个宣传单，他去其他酒店吃饭，运输方面都能赞成。（不是）非常不赞成的。这个互相有好处的，（游客）他去（另一个店主）他的地方吃，肯定会看下他的房间的。大家搞好，那个餐厅的生意，肯定就不错了。在很休闲的环境下，他住四天，可以去四个不同的独立餐厅。对，你们搞一个良性的联合。

Roland：Cooperation.

黄家磊：Cooperation.Yeah.就是大家只要做，你在网上宣传，大家都会觉得很好玩。你讲几个国家的菜，对不对，这个就是个良性的。但是，肯定也会有竞争压力的。你一个人去他的地方，他的房间肯定要搞好一点，才不会被比下去嘛，对不对啊。然后价钱，大家也不用怎么便宜的，像 Ian 你就卖得、卖得蛮贵的，是不是啊。Do you still keep the same prices? 对啊，我也没有降价的。今年住酒店呢，是有点儿大落的，我看是有两个原因的。我这样讲，今年六月份，现在七月份对不对啊。天气是一个原因。天气是什么呢？不是它来，是我们要感谢那些中央电视台（报告），它讲广西大雨，那就死了。阳朔肯定是广西嘛。阳朔（虽然）没有雨，（但是）广西大雨（游客）他就不来的。它天气预报，三天之内，广西大雨，它又不讲清楚是哪一部分。

大家：哈哈哈哈。

黄家磊：有时候，它说有大雨。我说怎么有大雨啊。但（今年）确实也多了很多下雨天。第二，我们也知道，今年政府控制开支方面，也是一个很大的原因。但是我认为，我今年收入是….我认为阳朔是这样的，up、down。尤其是在做生意

Roland：签个十年呢，它是稳步，但是这两年呢是有点停，我认为这是企业的调整期。

其实我觉得我们做生意我们都知道今年还是没有去年好，去年没有前年好。

孙九霞：那不就是这样

Roland：所以最好 11 年的，11 年是最好的。还有看旅游人数也少。

孙九霞：但游客量总量是多喔，总人次不断在多啊。

Roland：总量是多啊，但是你要看他们住几天，很多人都过来一天就走了。

孙九霞：停留时间短，嗯。

陆华平：还有一个是分散啊，现在那个平陆、荔浦，它分解啦。他现在那个高速路一开通每年的节目、国庆，阳朔的房价这么贵，游客都分到它们那边去了。

黄家磊：平时不会分吧！

陆华平：平时不会分。嗯。

一阵嘘嘘声……

陆华平：还有那个乱报，去查那个就在乱报，阳朔一天 12 万人，怎么可能！就阳朔一天也，唉。

黄家磊：你介不介意讲一下，为什么阳朔的生意一年比一年差。

Roland：其实我的想法是，很多。我确定你们每一个人，给你们三天时间写一百多个小细节、小问题，你们都会。问题很多，但是都是小问题。我们要看威廉开始说就是 05 年之前，阳朔每年可能有几万个外国游客过来，但他们跟谁合作，就是你们会说英语的人，因为你们自己的能力，你们学了英语，你们质量比较高，你们明白客人要什么，所以你们富也好，我们当时的阳朔是什么？平台，不是山不是水，是什么？不是住哪里。是感觉，当时候客人的感觉很好，咦，我认识这个老板，见了两次三次，我们现在是朋友，以后还发邮件，过两年我又去，现在过了 05 年我感觉就是阳朔这个平台丢了，没有感觉了。我去一个地方旅游我就是要 happy，开心。我带我的家人去，我就是要高兴的感觉，因为我天天上班，天天有很大压力，我就是要 relax。如果我去一个地方我没有感觉，没有开心的感觉，还有就是性价比不好，那我以后不去了。很多中国人都知道我这一辈子我要去杭州，我要去拉萨，我要求阳朔，我要去意大利。去过一次，以后不用去了。这是很大问题，他们没有感觉，他们就是要拍照，回家给朋友看，以后不用来。如果我们要发展阳朔的旅游地，我们要确定必须把这个感觉找回来，但是说 05 年以后很多中国客人进来，阳朔外地很多村民发现现在我也可以赚钱。我也可以当导游，我们有导游证，我们没有学过，都不知道，但是我们可以带他们去，我也可以赚一点钱，但是他们不懂客人要什么。他们不懂客人要求不知道服务怎么给，就知道赚钱，所以很多客人觉得没有什么好的感觉，就是这个导游在骗我，这个餐厅骗我，这个酒店骗我，我一天在路上就吃喝，唉，我都不想去了，感觉掉了是最大的问题，如果说就是，我听西塘说了我听 sam 也说了就是卫生间，这个小细节很多，就是我在这里做生意我都感觉政府都不管了，就是拿钱赚钱以后不管啦，这个我刚刚说的那个小导游，他们也是这个感觉，今年拿钱无所谓明年会怎么样，但是我看丽莎、威廉，我们都看长时间的，我们知道这个合同有 30 年，那以后过 5 年我还要赚钱，我希望我的小孩现在可以去小学，以后可以去大学，这个你也可以看长时间，不是一天一天一天，如果你只看短时间，忘了长时间的事情，那么你还怎么给感觉啊！如果我们酒店有客人不高兴，sam 也知道，那就算了不用付钱了，你现在结转不高兴，你出门也不高兴，那就不用给钱了，下次你还来住，免费，没问题，最重要你开心，要长时间的生意，不要不好的评价，对不对！就是要所有的客人高兴，就是像有几个酒店，我们属于很小部分的，但是如果我们这里 5、6、7、8 个人把我们的质量提高，服务也提高，我们 cooperation，一起做生意，那还是很小部分，阳朔的感觉还是非常不好，你看阳朔这是什么问题，你们来阳朔这个监测，不知道为什么我们在这里，我在阳朔干什么，我骑自行车，全部都是拉货车，噪声当当当当，我的感觉就不高兴，我们几个人也不能说什么，我们的目标都好，但是我们都没办法，先别说叫旅游局、叫县长、叫书记，叫谁，我们都不知道，找了书记过几年又来了一个新的书记。

众人：哈哈哈哈哈哈哈。

Roland：又从新开始。所以如果你现在是客人，不管是国内的还是国外的，你去阳朔感觉不好、性价比也不对，你觉得这里的人就关心一个事情，money。钱。以后你不来，阳朔的游客越来越少。我觉得如果我们要发展阳朔旅游地，肯定要跟 sam 一样要很多小细节，但是我们要想大的问题、大的度怎么安排，我们要有目标，从大的想法开始可以解决小细节。

孙九霞：能不能给一两个大的想法。

Roland：问题还是解决问题？

孙九霞：解决办法。解决问题的办法。

Roland：我觉得刚才小黄也说了一句话，我也不是领导。

众人：呵呵呵呵。

Roland：这是一个问题。谁是领导，怎么找领导。我们也要想我们的小孩，我们也有想 20 年后的阳朔还是一个好的地方，我们要注意不要变成很大的垃圾桶，我们来阳朔，我们都喜欢阳朔很好，那我们就要找多一点这样的（机会），但是也在政府里面，因为我刚刚说了我们小的声音，大的问题只能通过小问题来解决，但是要先说了大问题在哪里，怎么看小问题解决大问题。

孙九霞：现在大家对这个就是说，事实上我们在说游客少了是指游客消费这一块，但事实上看这个拥挤度的话，那我们可能是应该是多了。

黄家磊：不好意思，再说一次消费怎么样？

孙九霞：消费上少了，营业额低。

Roland：很多的旅行就是从上海到阳朔，3 天包括飞机票、包括酒店，999。他们在这里什么钱都不花，但肯定是登记的，肯定算一个人的。

孙九霞：就是它的人次多了，但事实上，它的人均消费低了，是不是这样呢。我说的是整体上说，但 sam 定位是相对消费高端一点的。所以就是说他用价格和标准来筛选他的顾客，我就是定位是这样的。

Roland：你要看为什么他们的生意那么好，他的所以那么好，是因为他们给的服务，他们给的质量很高，这个肯定有人回来，我的很多客人说，他们住 3 天，一个下午去阳朔，回来说：哎呀，不去不去，太恐怖了。但是他们还会过来我们酒店，为什么，因为他们觉得那边舒服，他们会来是因为我们酒店服务高质量好，如果说阳朔全部都是这样的，那么每个星期肯定坐高铁，两三个小时从广州出发，你可以每个周末都来。

孙九霞：我们待会再一起讨论，你说的是大问题和小问题啊。好像还有人没说话。

前局长:昨天我听了一个观点：无奈的导游和导游的无奈

旅行社老板：刚刚说的无奈的导游和导游的无奈，确实，其实所有的因素是相关相惜的。刚刚黄老板也讲了，他们正常的经营是持牌的，不正常的是他们不是一个从业者，某一个行业进来做的，我讲的很简单，阳朔这一块的旅游我是从 2000 年开始做的，但是阳朔只有两家旅行社，最初阳朔国旅是在阳朔注册的，最终卖给了桂林，一家旅行社在阳朔生存不了，反而卖给了桂林，阳朔没有一家正统正规的本地的旅行社，那么我们经来经营旅游后，从两家旅游部

借助桂林的旅行社来经营，到现在为止，四五十家旅游部还有没挂牌的或者是街上的那种自行车租赁，或者是，不讲了，太多了，龙龙统统的讲，凡是能够涉及旅游行业的都见缝插针，满大街都是从事旅游业的，那当时政府的话看到这个形象也是，当时桂林来阳朔旅游的都是要回去桂林住的，不可以在阳朔住的，93 年开始政府也是做了蛮大的努力，把游客留宿在阳朔，当时桂林市很牛叉的呀，就在收费亭守着你，桂林的车来到阳朔，来了多少的车他非常清楚，那些车没回去，好，第二天那里出车的？我就开罚单，很厉害的，他们都回去，后来政府通过努力了，有些老前辈老干部们确实做出来很大的努力，阳朔后来就有了入住的客人以后，酒店业发展起来了。当时阳朔的，我们讲那条路，名字不文雅不好讲，那条街以前都是田，没有小餐厅的，最好的是什么？阳朔饭店，还有现在在改制的这个西兰山饭店，还有一些小旅馆，后来能够留宿以后呢，阳朔这个私营企业啊出来啦。所有的酒店好像是雨后春笋一样发展起来，那时候 97 后，新世纪它是在 97 年建的嘛。

丽莎：很难批的当初，我们的涉外旅游证批了三年

旅行社老板：我们不讨论涉外这方面，首先是这个旅游能够留宿下来的，不管是境外还是境内，因为毕竟我们讲我们在讲游客的留宿以后才能有发展，才能有地方的那个经济能够提升，对不对？我不管你涉外的什么东西，是以后的发展。至少他留宿进来啦，那么好，酒店就很多是特色企业啦，接下来呢，配套设施，旅游服务部有四十多家，那时候在 2002 后，我开始在旅游协会，旅游服务协会会长，当时有 38 家旅游服务部，一家阳朔旅行社，后来呢，新进旅行社为什么到现在已经被 pass，他自己 pass，它做不下去了，他很无奈，就刚刚讲的，导游的无奈，旅行社的无奈…….

郑江：2002 年，一家阳朔旅行社，新进旅行社，后来呢，新进旅行社为什么到现在被 pass，他自己 pass，他做不下去了。他很无奈，就是刚才讲的，导游的无奈和我们旅行社的无奈，一个样的。阳朔这一块，突发猛进之后，雨后春笋一样，酒店啊，旅行社啊他就出来了，那么阳朔的这个旅游从业者，也是全民皆兵起来了。

黄家磊：全民皆兵的。

郑江：啊，反正大家一窝而上，大妈型的，老太太型的，他们的裤脚一个高一个矮的啊，脚上还有泥的啊，刚插完田早上插秧回来的啊，都来啦。这样就影响了一个问题了，刚刚讲的，品质问题。他能给旅游者一个怎样的印象，他能给旅游者阐述我们当地的其他特色没有？做不了！他就是得钱就得了，不管他了，我带你走完一圈就得了，ok。甚至还有一个问题，为什么，刚才讲的，回头讲的，新进旅社为什么会被 pass。下面的所有从业者一拥而上，把客人一个一个瓜分，到不了旅行社手里。我算什么，蛮霸道的。我在停车厂那里有一个店，他们不敢过来的，过来我就揍他（众人欢笑）。是真的，我在这里经营，我退一步来讲，我们是做旅行社的，你们是做酒店做餐饮的。我放着正规旅游不在这里做，你们全民皆兵都来搞，黄老板这边，旅游住宿你们拿走了，餐厅这边，旅游局，旅游线路，门票拿走了。我在这里谈得好好的，整条线路玩下了，要 10 块钱。他们就在外面添乱了，我给你们更优惠的价钱，6 块。我靠，那个人就冲着 6 块钱跑过去，那就好了。那从这种成本来说，我们大家都是经营者，我们有正规的工商营业执照，要租赁场地，说到租赁大家讲了大家很无奈，阳朔什么都不高，房屋的租金最高，大家都做不下去，所以说，租金高，

哪个店里不要那个，水电费啊，人员工资啊，对不对，那吃什么，那我肯定要把这个算出来，那刚才讲到了全民皆兵，我早上插完田，我出来搞一下，我得 5 块钱，就得一碗米粉啦，得不到钱，我回去继续插秧我不是也没有损失啦。但是我这里又要讲到一个问题啦，我们呢，凶的还能把持得住，不让他进来，但是不凶的呢，可能就会关啦，关了又关，这就是讲的新进旅行社自己都不愿意做啦，所以最终自己 pass 掉了。这个呢也得益于刘局，反正如果讲得有点不对的话你们……

刘局：也可以谈现在

郑江：很无奈，阳朔旅游局发了一个证，导游证，我讲了很久，为什么你们要发这个证呢。后来我从旅游法，这个旅行社导游经营管理这个里面来讲，他们是没有这种资历的。后来他就解释是什么，阳朔这一个大景区，这个是，导览加讲解证。哎呀这样来区分就完蛋了，他发了这样一个证，导游呢都去考，考了以后就是一个正常的外衣披着啦，

黄：这个证是个无赖的证

郑江：他的职责他也不分，它不像这个是矿泉水，这个是手机大家分开各自搞是吧，他不搞啦，他把所有都打包起来，统统可以做的，地接我也可以，卖房我也可以，炒作旅游门票我也可以，机票什么他都可以去做，他充当了旅行社的资质，导游的资质，旅游车队的资质，餐饮的资质。这个证呢，我就说呢，你们发得确实好，确实好的表现了我们对他们的无奈。讲的野导野导，确实讲的是他们，党和政府还要求我们不要讲他们是野导，他们是地方导览员，带路人。那我们要干嘛呢，我们旅行社，至少我有 30 万的质量保证金，交给自治区旅游局，我的场地要租金，我有正常的工商营业执照，他什么都没有，就是一个证。那个证我打听好像是 400 多块钱（众人噗笑），好像年检不要钱，还要求他来年检。

刘局：这个也是，旅游局就把这个市场搞乱了。做得就非常不专业

孙九霞：那他们一共发了几张这个牌？

郑江：多哦，2、3 千都有。

刘局：他这样搞就乱了，一个县都乱了。

孙九霞：但是我现在看到的不是牌的问题，而是全民都这样。

郑江：对，我告诉你啊，现在是这样啊，我都不考了，我也可以上岗，我无证也可以上岗。

孙九霞：今天早上我去世外桃源，我看到一辆轿车，一停下来，哗，可能有 20 个人就这样扑上去这个轿车。

郑江：那个是另外一个了（众人回应：飞虎队，众人议论：好可怕），旅游局，包括到现在都不管他的。

孙九霞：现在到我说了，您体格好一点可以打，那些不能打的怎么办。

郑江：接下来，出现这一块市场的话，又来了一块，飞车，它是飞虎队啊，有区分的哦。你们说的两个是一块市场，你们几个一块地方，他们几个一块地方。从阳朔的告诉路口到白沙的那块酒店是谁的，那个高端酒店门口是谁的，他们划分的很清楚的，基本上客人全部揽。然后，飞车又追，一个客人他从一个地方到一个陌生的地方，他到一个地方是相对陌生一点，一下车以后刷飞车党就来了，这个手一甩，甚至你那个客人不配合怎么样他还威胁你。……

刘：这个现象可以忽略啦，我们还是研究下别的。

孙九霞：这个现象可能一时半会不能杜绝，那想问一下在这个现状下你以后打算怎么办。

郑江：不时不可能解决，你们看下桂林是怎么做的，桂林不还是有这种旅游从业者，他们还是把客人拿下之后，交还给旅行社去做，至少是正常的这种做法，其实可以参照桂林的做的。

孙九霞：就是说他拉人来给你。

郑江：是呀。他们大家都有这种操作流程的，不是不可能的。

孙九霞：额，就是你先不说外边的压力下，就是你自己旅行社的这一块，你未来的转型有没有一个你自己的突破的什么的。

郑江：这个现在，我们也是……，现在的游客，以前的散客是大概 3 层，团队 7 层，通过旅游法以后，反倒过来了，基本上是散客接近了 6 到 7 层，团队相对少的了。

黄家磊：正确，我看其实可以类比出来，也就是强调一个情况就是，投诉……，不时假的喔，二是透过你去定什么东西，假如出问题，你的店跑不了了我跟你讲，那些 8888 就是这个样子的呀，比如说那些我们讲到的野导啊，他们能够组织起来在门口等啊，酒店有时候，客人去餐厅吃饭，就有宰客的，你去其他的，能够找到更加好的。

郑江：这个旅游法出来之后，我们旅行社也在转型做这个，我们现在做的这个是电商，我现在做了一个电商。客人要求的是不再是常规的旅游线路，我们是由量身打造的一个舒适，贴切的衣服一样，用心的给他做，甚至不时说要一拥而上，一大批的多少人多少人。两个人，一个家庭，量身打造一个，所以说区别就来了，所以我们现在都在做啊，我们做这个都已经做了一年了。我原来讲过这个问题，开始做这个的时候，因为导游比较乱，我也钻了导游的空子，那我就做票。那我就做票了，你们自己抢吧，抢回来我要这个价钱，剩下的全是你们的，那我们就是钻这个空子了，那么我们也是可以的，最后我们就做了一个网站。我们做的网站，在几个大的旅游网站上设了线路，我们做了我们的地产，我们总是很适宜的在服务客人，在精心的设计线路。

孙九霞：所以我说，我觉得这样就比较放心了，你不能说只是外强……

郑江:但是还有个问题呀，就是带客人走。如果讲的最简单，我们没有看到印象刘三姐之前绝对不让他们走到西街。

孙九霞：走到西街就没有了，就不是你的菜了。

郑江:就不是我的菜了，那我白白地奉献出我的青春。

孙九霞:嗯

郑江:我想啊，是吧，就是说现在我们这会儿转型自己再做，自己再做这个这种小的这种团队……

孙九霞：对，因为这样的话就……

郑江：甚至采用我接下来的一个想法我就想把这个阳朔不要做这种常规的票务，跳入这个麻烦不要再做了，我现在也设计了几条几条这个旅游专线。

孙九霞：定制化了，个性化的

郑江：旅游专线就是说把个人分为半天跟一天、两天这个旅游行程，现在打包出去。

孙九霞：对。

郑江：现在我在做的几个这个世外桃源啊，漓江啊，这个……

黄家磊：专线

郑江：这几条专线，还有印象啊，我们都做得不错，我们打包给他做出来。

孙九霞：但你还是要由你的导游干的吧

郑江：对呀

孙九霞：因为我现在挺担心的，如果这样漂的话，你要不护着你的客人的话，一路上都被骚扰得痛苦无边的，是吧

郑江：这个是，其实，这是肯定的……

黄家磊：这个不算，因为导游已经有了，这个有了导游就不会了

郑江：现在整个遇龙河的这种味道已经变了（孙九霞：我们那些在漂流的时候啊，吃东西的时候啊，照相的，是不是）

黄家磊:你得搞啊

孙九霞：嗯

刘局：……请来的这个企业组，能不能发会言呢，就是你看现场那个议论的时间给你发挥一下

孙九霞：嗯嗯，我……我没有什么，还有那个，是不是几位，你们……

莫高阳：就是阳朔小微企业沙龙，我跟你说是文联主席莫高阳。接到通知我就过来了，刚才听了前面几位先生的话，我觉得就是……就是，有必要讲一下。这个阳朔旅游，刚才那个 RoLand 说的是，阳朔现在有一个共鸣就是客人找不到感觉了，我就想起来了个 85 年，85 年阳朔有个什么现象呢，就是最早老外到阳朔的时候，85 到 88 年，我们在你附近那个菜市买菜的时候，然后他们有人用阳朔话讲价，根本一点差别没有，他讲的就是阳朔话，站起来才发现他是一个高鼻子，蓝眼睛的。这个事情我在城市 1+1 央视做节目的时候讲到的时候，那穆正楠觉得很奇怪，原来那么有一个交流，他忽然抛了一个问题在计划之外的，问我阳朔为什么会呈现这个样子老外会喜欢阳朔，我当时就没词了，我就我就把这个事情……就我们以前也没提到，那时候老外喜欢阳朔什么，喜欢阳朔一个什么样的感觉，就是东方的一个小镇，很安静，生活很慢的，很休闲的一个小镇，这就是感觉。那你一个，现在，我们的国家正在发展的时候，发展到现在，改革开发 30 年哦，全国都走入了一个除了 money，出了这个钱什么都不认的一个境地了，一个尴尬的境地了，所以现在为什么是习总书记现在提出了一个梦，习梦思，习主席关于中国梦的思考，他就想把中国这种一架马车拉回去，以前有一个中国人气节的一个东西不时老是论钱，所以呢这也是一个发展走入了一个误区，所以说阳朔也是这样。所以 RoLand 也说的很好，小问题我们都可以提出来，每个人回去写 30 个阳朔的问题都可以写出来，那现在要怎么来做这就是一个大问题，而我们要求政府去做，做这个事，你又想在改革开放 30 年后大家都在追求 GDP，追了 30 年后突然又要回来追一个很虚的东西，很多政府转不过弯来。莫高阳：对对对，友好。所以呢，这也是一个发展，走入了一个误区之后怎么回来呢，阳朔也是这样。你要想阳朔的政府，要看到这个，就是说小问题我们都可以提出很多，每个人回去写 30 个小问题，关于阳朔现状的。那现在要怎么来做，这是一个大问题。我们要求政府去做，去做这个事，你要想在改革开放 30 年以来大家都在追求那个 GDP，在这个 30 年以后突然要回来，要去做一个很虚的东西，去做纯的服务，很多领导很多政府转不过这个弯，包括阳朔政府。我现在看这个政府根本就转不过这个弯，这也就是那个，半年前吧，半年前领导寻找这个旅游局局长的时候，找我谈话。然后，谈到第三句话，我就说了，我说是不是在寻找、谈话找这个旅游局长，他说“是，你讲讲你的理解”，我就说我不去旅游局，我坚决不去旅游局。我原来在市委办做副主任，搞接待，（哼哼过惯了？02：25-26），那就出来了以后单位越做越小，从人事局做到那个扶贫办，现在到那个文联，一年就是一万五的那个财政预算，可以说是最穷的单位，鲤鱼跳龙门翻身的机会你还说你不愿意去。当时我的想法，我给领导说了，我说我做旅游局长我不敢保证阳朔文化能够给旅游做支持，但是我做文联主席，我可以努力的去做文化对旅游的支撑。这也是我昨天准备的一个发言，关于这个地域文化对当地旅游的一个支持，就是如何找回阳朔当年的那种感觉。今年，2014 年的 3 月 14 号，有一个 2014 十号关于推进文化创意和设计服务相关产业融合发展的若干意见，它里面就把提升旅游发展文化内涵列入了近期的重点任务。但是这个文件下来了之后，我说旅游局里面有没有，政府有没有在旅游的这一方面做过传达。为什么不传达？这个文化的东西你要做传达的话起码我们文化界是要有人去参与。为什么不传达，因为政府在这个方面，不知道怎么迈步，这一步怎么跨出去。讲钱，都讲经济，都在追求人数，甚至去年阳朔的旅游人数超过一千万。这个一千万是怎么来的呢，我们大家心里都有数。都在追求一种很浮躁、很表面上的东西，就是说很直接的一个政绩上面的东西。那你要他做一些虚的，就是给客人来说、给经营

者来说，找回原来那种东西，那种感觉的，可能现在的政府都不会去做，起码到下一届才会有人认真考虑这个是事情。那么就阳朔，我的想法就是，做好下面几件事情，包括上次我们的旅游论坛，都形成共识了，包括保继刚教授在市里面，桂林市核心发展的两会上面也讲了，就是桂林缺客人吗。那现在就是讲过的阳朔却客人吗？但是阳朔缺的是什么，我刚才说了，客人到这里以后，现在很多客人就是什么呢，到阳朔旅游其实和到全国各地的旅游一样，大半已经准备从口袋里面掏钱，掏钱是对的，问题是一大帮人，就像公园鱼塘里面的那个鲤鱼一样，锦鲤一样，张着嘴巴在水面等你，等你口袋里面的钱出来。刚才说啦，一大堆的人，车一停下来，哗就奔上去，前面发言的人就很多看到这个节点，就是实质上就看你的钱，你钱给了他就什么都不是了，他就不理你。那客人在这里，他是，我们可以赚钱，不赚钱旅游也是搞不下去的，没有发展。那怎样去赚钱？又要给客人一个美好的印象，有回头客，让人觉得阳朔如何更值得游，还有一个就是游阳朔变得更加便捷放心，让阳朔人变得更加可信。还有一个就是，购物的地方，让人心甘情愿地花钱在这里。涉及我这一块的呢，文化这一块的呢，我就稍微讲一下，实际上旅游是很容易复制的，你现在看哪个地方都开展旅游，只要把那种所谓的伪民俗的东西建起来，在一个村里面，哗啦哗啦建一些吊脚楼，哗啦哗啦建一些什么东西，看起来好像很民俗，但是实际上这不是那么回事，然后它就可以对外旅游了，可以搞旅游了。这东西可以复制，但惟有不能复制的是什么，是它的脸谱，是它的感觉，这个一个人到了这里以后他为什么愿意到这里来，他有他的想法，他有他的感觉，那就对了。没有感觉，那你纯粹是花钱，纯粹是送钱到那个地方去，然后，那客人估计不会去。那你阳朔要区别其他的地方，靠什么，就是阳朔特有的文化。阳朔特有的文化就是出了它自己的，1400 多年发展形成的自己的特有文化。还有现在发展起来的山水文化，还有这个中西文化，等等这些都是值得去发掘的。阳朔的这种文化实际上是一个可变化的，它是原族的阳朔人和不断融进阳朔来的阳朔以外的人，就包括以前阳朔就没有，二十年前阳朔都没有的，三十年前阳朔是没有这个中西文化的。现在有了，那在这里就是阳朔的特色。简单一点说，让人觉得阳朔人可亲，阳朔 1400 多年的发展是一个不断融入外来文化的一个历程。包括我们现在在座的，很多都是外地来的，到了阳朔以后就在丰富阳朔的文化。那么阳朔人在这么一个情况下，有一个很明显的特点就是包容，诚信和包容，这一点可以说是阳朔文化的一个主流。我们现在的这个李莎，还有玫瑰木，月亮妈妈，大师傅啊，谢大姐啊，西街传人啊这些，还有现在官方正在大力推的（文月？）等等这些都是诚信和包容的一些见影。最早的时候，像李莎，李莎原先是阳朔西街上面卖酸菜的村姑，到了 83 年之后，84 年的时候人家什么，背包客拿着那个孤独星球，到阳朔来找谁，找李莎，有困难找李莎。我们说有困难找警察，他们是有困难找李莎。找到李莎了就什么事情都可以解决了。这是一种诚信，这种作为正能量宣传出去对阳朔肯定是有好处的。如果老师盯着个别性的，当然个别性的、不好的现象肯定不能让它发展，就是要保证这种正能量。保继刚教授说过这么一件事情，一百个人里面有八十个人是文明的、讲诚信的，那少部分人他就觉得自己，他就奸诈不起来，如果大家都在宣扬这么一个气氛，就是大家都不诚信，那么百分之三十、百分之二十的讲诚信的人就肯定把诚信收到口袋里面去，这些就是我想说的。

孙九霞：这个的确是现在形成的一些新闻，移民文化，中西方文化。其实很多人是移民，他们现在有一个群体就专门研究旅游移民的。旅游移民不仅仅是过来打工的，他更多的是方式型的移民，就是说我喜欢这个生活方式我在这里做生意，其实在座的各位应该都是，大部分，如果非阳朔人的话。那个，周局，你说两句。

周训林：这个孙教授、孙博士，现在是孙院长（“没有”），也是我们的老朋友了。你们带着这个学生，来了一批又一批，做这个调查。我在阳朔 26 年，对于阳朔的旅游发展也是从一开始、从小到大的见证人。既然那么多同学来，我就想比较感谢大家，特别是中山大学对阳朔关照，跟踪了十几年，保教授对阳朔的发展跟踪了十几年了。所以我们阳朔的这个旅游规划都是中山大学合作的。孙博士他们最早开始做，他们现在的话可能就很多就过时了，现在开始需要修编。阳朔发展这么多年了，到现在应该说阳朔的发展从 1973 年、从邓小平陪加拿大总理到阳说以后，这是时候阳朔的旅游开始了。最早是从背包旅游，外国人，开始宣传阳朔，从外国人开始。所以现在之前在会议上也与孙博士讨论过，说阳朔是中国乡村旅游的发源地，当时提出这么一个观点。所以现在发展到今天，应该是四十年了，发展到今天以后，回过头来，我们要反思一下，阳朔的旅游到目前为止发展到一个什么程度，当然阳朔获得的这些称号，都有了。中国旅游强县，中国旅游标准化示范县，这些，还有世界旅游组织推荐，几十个称号都有。但是，我们现在确确实实存在这很多很多的问题。其中的一个问题，就是如何能够转型升级，就是我们现在要探讨的。所以，我想说在这个课题上教授、我们这些同学们指明一些方向。上次研讨会的时候，一个是请这些专家学者，这些资深的旅游行业的同行，给阳朔体体检，把把脉，阳朔现在到底还存在一些什么问题。不要那么夜郎自大，不要那么固步自封，认为自己了不起，阳朔多大多大，是旅游名县。当时设这个旅游名县的时候就是说不要争第一。当前根据我本人所了解的一些情况，我感觉我们阳朔主要存在的问题一个是旅游资源，旅游资源的整合再利用。怎么整合旅游资源，阳朔的旅游资源很分散，这些景区它是各自为政，都是一个小的东西。对外的话，我们是一个整体，整体阳朔旅游，说四个字。不像那个九寨沟，包括千岛湖、黄山这些大景区，对外宣传都是一个整的旅游产品。

周训林：这个是我提出的核心的整个问题，再就是整合资源和旅游资源的再利用，怎么整合资源呢？在 2007 年的时候，对桂林市我们就提出了这个问题，当时是争取漓江的竹筏的漂流问题，就是从桂林到阳朔这么好的一条漓江道，就 200 多块钱就能解决，充分发挥漓江它的作用，它的再利用，再就是发挥它的价值，现在的话就包括遇龙河，这条遇龙河它的价值在于进一步地提高，提升，挖掘它的价值，这就是这个问题。第二个就是阳朔旅游资源，旅游设施如何进一步完善，其他我不讲，目前就阳朔最差的就是这个交通问题。交通这一块的话，作为我们阳朔当前最大的一个问题，那个隧道开通以后，可能会缓解。这些有些没有办法的，这个阳朔县城的道路，如何把阳朔的形象进一步提升，人行道是桂林市县一级最差的，阳朔这个确实。（由于时间关系，发言被终止）我就是想和学生讲讲阳朔存在这些问题。

黄秀琴：今天我个人是十分荣幸的，参加这个沙龙，在这里，有我们阳朔的旅游经营和一些老领导，还有我们的旅游专家。我这次来，我是带着一个学习的态度来的。而且刚刚听大家说了那么多，我觉得自己真的学到了很多东西。

我自己也有很多感触，我们阳朔旅游发展到现在的话，确实在全国来说，在县级城市啊，能发展到这个地步的话确实是非常不容易的，而且也是走在县级城市的前列的，也是发展得很好的。然后，我们阳朔旅游的优点，我就不说了。我刚才听了大家讲了那么多的阳朔的一些情况，其实作为我们旅游局，就是旅游行政管理部门来说，我觉得我们这个局更多地是为大家服务，做好这个旅游工作。现在我们这个行政部门不仅是上面有什么政策下来，我们要执行，我们对大家也有这个服务的态度。所以当时我们自己也说我们这个旅游局的话应该改个名字，叫旅游服务局，是为大家服务的一个局。然后这个的话，我自己也有个看法，就是我们不仅是从上到下的这样一种管理，也应该是从下到上的一个管理的体制，在阳朔，我们可以成立自己的协会，现在我们已经有了我们的酒店行业协会，旅游服务协会，这样的协会我们都好，但是这样的协会的互通和我们旅游局的互通，现在还比较少，以后的话，这些协会啊还是我们旅游企业的沟通这些方面应该多以来，然后我们旅游的一些政策，还有我们旅游的一些东西，我们要多听大家的建议，多开这样的例会，然后以这样的形式来做。我们一直都在提阳朔应该规范管理，其实规范管理还有一个很重要的就是旅游约束，在这个约束体制下面应该是可以做得更好一些，不仅是我们这样一种从下面都上面的监督，而且的话在以后我们中山大学旅游观测点这一块也需要为监控我们阳朔旅游发挥有效的作用。刚才我旁边这位荷兰的 Roland，确实你说的很多话都是阳朔现在应该做到的，而且现在我们的话，不仅要服务好，而且是要做到有效的服务，这是我们今后要做的东西。而且阳朔的话，现在我们说已经成为观光旅游到休闲度假旅游这个，其实我们自己知道没有真正地转化为休闲度假旅游，我们需要做的事情还很多，包括大家刚刚说的一些游客的消费太低了，层次太低了，还有我们的这个保护游客的合法权益这个方面做得还不太到位，所以其他的就不多说了。用一句话总结吧，路漫漫兮，吾将上下而求索，阳朔旅游，任重道远，谢谢！

孙老师：非常感谢大家啊！其实当时我还在想用白天还是用晚上，因为我知道现在游客很多，各位呢，都在经营着自己的事业，能够拿出这样的一个时间来我们坐下来，我个人觉得这个时间还是不是很够，因为本来有更多的话题我们可以展开来讨论，但由于时间的关系，我们只能就此打住。今天我个人其实是收获非常多的，前两天我是很悲观的，悲观是什么呢？因为我也算是阳朔的粉丝这样子的，从 12 年前跑遇龙河，遇龙河的 20 多个村庄，我每一个都去过了。我昨天特意去了旧县，旧县那里有一个做四合院的，他家没有变化，只不过餐饮多了点，我在那里吃过饭的，我就又去那里看了一下。然后整个沿途的变化，我每年都会看，然后还有西街的变化，这样的一个变化是什么呢？不是我想看到的，不是成长性的变化，它是一个乱象，就是说是东西多了，多了的东西不一定是好的。他现在的一个变化是五湖四海的都来了，哪里的都有，不是阳朔的东西，也有桂林的，也有丽江的，什么湘西的，应有尽有，哪里的都有，同时了，也是现在的也不是未来的，是过去的，就是杂七杂八的，吆喝的，什么都有，这个让我很担心，阳朔的未来要去哪里？我自己也在想，它有没有未来，它是有未来的，它也可能会更好，但是它又周折。但是今天我特别高兴，是什么呢？我也特别庆幸叫大家过来，每个人也在反思，并且做了很多东西，比如这两个国外的朋友，他们做的东西其实是一种示范性的，刚刚有人说不是太多了是太少了，这就是一种示范。我虽然很辛苦，我要花很多心思很

多钱，事实上那样的老房子本来是要退出历史舞台的，被现代化所抛弃的东西，然后他把它复兴起来、回归使它的价值提升，那样的一个空间把它变成有意义的空间是非常值得去提倡的东西，另外了，刚才几位也是，特别是那个西唐，他看到的一个市场，这是一个真正的高杆市场，或许我们回不到背包客的时代了，但是我们可以跟现代人的新需求叠加起来，我可以跟新的一些消费趋势，然后把它放大，把它的影响放大，这些都可以做起来。另外了，其他都谈到了，就是在不同的业态里，像旅行社已经是必须要转型了，因为消费变成了一个直接购买时代，旅游中间的需要在降低，它的作用在降低，那我们必须要转型，它其实一直再转。另外了，我也同意刚刚提到的我的标准是什么？你的价值在于你给出来的标准和服务，如果你服务够的话，可以要到这个价格，没有问题，这其实都是可以的。当然还有一些小微企业折射出的一些问题和困境，比如说人员的培训，人员的流动性还有这种行业的服务标准的，反正这都是一些很难的问题。另外了，提到了一个很高要求上的，很高要求就是文化，现在的文化就是，原先的阳朔其实就是个桂林山水，最多的是以自然景观为主的，而到今天，我们开始有了文化，印象刘三姐虽然是一个创意产业，但毕竟是一个人文性的景区，是认人文性的演出。那另外了，我们这种中西方文化的交汇地带，这个交汇了，不是说一碰头就走掉了，而是说外国人生存在这里，他们说着普通话，说着桂林话，说着阳朔话，可能他们的后代都在讲着当地话了，这就是融入的一个状态，这就是非常好的一些东西，那这些东西事实上是什么呢？我们在某种程度上是不是老要等政府，我们可以要求政府做，那他要是不做怎么办？不做他过两年他也可以离开，因为他有他的发展空间，但是我们怎么办？我们的事业在这里，或者说是我们的生活在这里，所以说了，今天我希望政府可能在未来更有为，比如说新一轮的规划，新一轮的政府措施都会有的，我相信。因为我历来是谁都相信的，但同时了，我也很相信大家。就像今天说到的，就像大家提到的很多东西，比如说我们可以做联盟，我们做共同的联盟，这个联盟意味着什么呢？其实是一个即是产业的联盟，比如说产业链，他做事件，他做户外活动，接下来的人在哪吃在哪住，或者说你同意都做吃，这一拨在哪吃，这一拨在哪吃，你代表的是什么，这是产业链的方面。另外，还有一种，我觉得也是，比如说价格的一个联盟，就是大家同样品质的，我都是一个高价的，我要用这个东西挑选我的游客，我有一个尺度。另外了，还有营销的联盟，政府不做怎么办？其实节事是有了，刚刚也提到的这种攀岩节，一年一年的坚持下来，我能不能融入更多的东西，大家一起。因为政府有时候，我有时候有点同情他们，因为我知道他们的职责。我昨天见了黄局，其实我知道和她没关系，但是我所有的怒气都发在她身上，我还跟他说了半天，你们阳朔政府这样那样的，一大堆不好听的话，但是了，我见了县长可能也会说，一定会说的。但是了，他做不了的事，我们要不要做？我们要做，我们要发出我们的声音，联合营销，搭建一个平台。另外，还有像服务的联盟，就服务员这样的，就我们能不能共同给她一个认证，或者是怎么样的，那样的人能不能给他一个更好的成长，或者相互之间那个….，类似这样的东西。所以了，整个的小微企业应该说是可以达成一些共识，然后共享各种各样的资源，并且还可以实现一些共勉。我觉得这样阳朔跟其他地方不同的地方，其他地方不可能的。你们就是一个一个的，你们中间可能很散，另外了，你们也很少有机会坐在一块，因为像张家界或者哪里，我也特别熟悉，因为张家界规划也是我们做的，我们经常会去，就是常去的一些各种各样的地方，还有黄山，很难实现这样的一种东西，这也可能就是阳朔真的那种精神。我觉得还是有希望的，未来应该会越来越好，当然

我也有点同意阳朔人特着急，缺了那个淡定和从容，所以，这个居民的成长，不知道该谁来管，现在看到的居民赶不上十年前看到的居民的那个眼神的淡定从容，你爱坐不坐，你看吃不吃，现在不是我就要扑上去，你凭什么这样子，所以你看到他的精神面貌没有成长，十年多了，没有成长。我们的旅游小企业是极大地成长了，一开始我就看着 Lisa 那个店在成长，都在成长，但是他们没有成长，这是一个挺可怕的东西，就像服务员也是，他们有些要求，或者是那些乡村导游，他们有要求，我只赚到今天的钱就好了，但事实上，这样他们也没有发展。我就看到了十年前他在做农家乐，他在撑竹筏，现在他的儿子女儿在干这个，他们还觉得挺高兴的，因为他们觉得原先两个人干，现在加了两个孩子，四个人干，这也是真的是有问题的东西，但可能这需要政府多做一些，多付出一些。那今天就到这里，今天也给同学们很大的教育，那同学们也给热烈的掌声。

附录二 监测问卷

阳朔旅游可持续发展调查问卷（游客问卷）

尊敬的女士/先生：您好！我们是**联合国世界旅游组织（UNWTO）旅游可持续发展阳朔监测项目组**的调查员，对阳朔旅游发展相关问题进行调查。本调查成果仅用于学术研究，不会用于任何商业用途，所有问题均为匿名回答，请您根据自己的实际情况放心填写。非常感谢您的配合与支持！

（1）这是您**第_____次**来到阳朔旅游

（2）请问您的**旅行方式**是：

A．自助游　B.个人参团旅游　C.朋友或家人参团旅游 D. 单位组织　E.会议考察　F.其它____

（3）请问您从何处获得关于阳朔的**旅游信息（可多选）**

A.报刊　B.网络C.电视　D.旅行社　E.旅游书籍介绍　F.亲朋好友推荐　G.其它____

（4）请问您最希望获取到的关于阳朔的信息有哪些（可多选）

A.交通　B.住宿　C.餐饮　D.景区介绍　E.费用　F.天气　G.文化　H.治安　I.卫生　J.其他____

（5）请问您来阳朔的**旅游原因**是以下哪些方面**（可多选）**

A.观光旅游　B.休闲度假　C.商务活动　D.公务会议、考察　E.公司、单位奖励旅游　F.宗教朝拜

G.科学考察　H.野外探险　I.摄影　J.探亲访友　K.节事活动　M.了解文化和美食　N.其它 ____

（6）请问您是**乘坐何种交通工具到达阳朔**的**（可多选）**

A.火车　B.飞机　C.长途汽车　D.自驾车　E.船　F.其他 _____

（7）请问您**在阳朔进行旅游活动选择的交通方式**是**（可多选）**

A.自驾车　B.自行车　C.出租车　D.船　E.观光车（巴士）　F.步行　G.其它_____

（8）请问您预计在阳朔的**停留时间**为：A.1-3 天　B.4-7 天　C.7-15 天　D.15 天以上

（9）请问您来到阳朔后所选择的**住宿设施**为：A.家庭旅馆　B.青年旅舍　C.星级酒店　D.其它

（10）您预计此行来到阳朔的**旅游总花费**为**（仅指您个人的花费）**

A.500 元以下　B.500-1000 元　C.1000-1500 元　D.1500 元-2000 元　E.2000 元以上

（11）请问阳朔留给您**印象最深刻**的是：

A.自然风光　B.人文风情　C.休闲氛围　D.社区居民　E.气候条件　F.本地建筑　H.当地导游

（12）您计划在阳朔**观光的景点**包括**（可多选）**

□西街　□漓江漂流　□二十元人民币　□骆驼过江　□蝴蝶泉　□图腾古道　□鉴山寺　□大榕树　□遇龙河　□月亮山　□龙颈河漂流　□杨堤风景区　□福利古镇　□其它

（13）阳朔西街最**吸引您的店铺类型**是**（可多选）**

A.酒店旅馆　B.西餐厅　C.酒吧　D.服饰店　E.手工艺品店　F.特产店　G.音像店　H.中式餐馆　I.旅行社、旅游咨询服务、票务代理类　J.外语学校　K.保健休闲养生馆　L.其他

（14）您在阳朔购买的**旅游商品**有哪些（可多选）

A. 民族服饰　B.日常用品　C.手工艺品　D.现代服饰　E.特产食品　F.创意商品　G.未购买　H. 其他_____

（15）您购买这些商品主要原因为（可多选）

A.旅途所需品　B.给自己做纪念品　C.给亲朋好友做礼物　D.价格合适　E.设计新颖　F.朋友推荐　G.导游推荐　H.店员推销　I.其他_____

（16）觉得阳朔与您的**期望**是否相符：A. 高于预期　B. 和预期一样　C. 低于预期

（17）您将来是否**还会到阳朔旅游？**　A.是　B.否　C.不确定

（18）您是否会**向亲友推荐阳朔？**　A.是　B.否　C.不确定

（19）请问您**是否观看**过**“印象 刘三姐”**实景演出？　□看过　□没有看过**（若没看过，请看第21题）**

（20）“印象 刘三姐”给您留下**最深刻的印象**是什么？

A.山水舞台　B.灯光　C.民族服饰　D.舞蹈　E.对歌　F.刘三姐　G.演员阵容　H.其他

您**是否同意**以下的说法（**在相应处打“√”即可**）	**同意**	**不同意**
在观看表演过程中，我最关注**刘三姐的故事**		
在观看表演过程中，我最关注**舞台表演效果**		
我回去之后会**进一步了解**刘三姐的故事		
“印象 刘三姐”**反映了**桂林阳朔当地居民生活状态		

（21）请根据您的旅游经历评分，在您认为合适的选项上划“√”：

		非常赞同	**赞同**	**中立**	**不赞同**	**非常不赞同**
	自然资源丰富,景色优美	5	4	3	2	1

		非常赞同	赞同	中立	不赞同	非常不赞同
游资源评价	漓江水质状况好	5	4	3	2	1
	文化景观具有地方风情	5	4	3	2	1
	文化景点维护得当	5	4	3	2	1
	可以很好地体验到当地的饮食文化	5	4	3	2	1
	阳朔山水甲桂林	5	4	3	2	1
游服务	可以买到满意的纪念品和工艺品	5	4	3	2	1
	景区门票价格合理	5	4	3	2	1
	餐饮有特色	5	4	3	2	1
	餐饮卫生安全	5	4	3	2	1
	餐饮价格合理	5	4	3	2	1
	交通便利	5	4	3	2	1
	交通标示系统清晰	5	4	3	2	1
	交通价格合理	5	4	3	2	1
	住宿安全卫生	5	4	3	2	1
	住宿价格合理	5	4	3	2	1
	食宿员工服务质量好	5	4	3	2	1
	景区员工服务质量好	5	4	3	2	1
	景区导游解说水平高	5	4	3	2	1
	娱乐活动丰富	5	4	3	2	1
	周边小商铺员工服务质量好	5	4	3	2	1
	旅游商品类型相同程度高	5	4	3	2	1
	旅游商品存在假冒伪劣产品	5	4	3	2	1
	旅游商品价格合理	5	4	3	2	1
	处理投诉效率高	5	4	3	2	1
	当地居民友好	5	4	3	2	1

		非常赞同	赞同	中立	不赞同	非常不赞同
体环境	景区环境干净	5	4	3	2	1
	阳朔空气清净	5	4	3	2	1
	阳朔噪声小	5	4	3	2	1
	社区治安状况好	5	4	3	2	1
	当地商业氛围过于浓郁	5	4	3	2	1
	对阳朔旅游总体感到满意	5	4	3	2	1

（22）您是否认为阳朔应增加特色民宿？

A.是，价格不重要，要有特色　B.是，价格便宜最重要　C.否，不太需要

（23）您对于阳朔发展民宿有何建议？

_____

（24）您是否认为阳朔应发展价格相对较高的个性化定制旅游服务项目？

A.是　B.否

（25）您认为阳朔适合发展哪类个性化旅游？

A.富有特色的相亲游　B.亲子游　C.高端定制游　D.银发游　E.探险游

F.“慢旅游”等深度旅游　G.其他_____

（26）您认为，今后阳朔的旅游发展，应该重点关注的是(可多选):

A.增加新的旅游活动　B.挖掘和拓展历史文化内涵　C.提升旅游服务质量

D.完善旅游服务设施　E.完善内部交通条件　F.改善对外交通条件

以下是您的一些个人资料，我们将依此进行研究分类，请您放心填写：

1、 性别：A.男　B.女　**现居住地：_____省_____市**

2、 年龄：A.18 岁以下　B.18-24 岁　C.25-34 岁　D.35-44 岁　E.45-60 岁　F.60 岁以上

3、 文化程度：A.小学　B.初中　C.高中或中专　D.大专　E.本科　F.本科以上

4、 职业：1)政府机关或事业单位　2)公司、企业服务行业　3)个体工商　4)科研教学　5) 离退休　6)家庭主妇　7)学生　8)其他（请注明）_____

5、 个人月收入：A.1500 元以下　B.1501-2500 元　C.2501-4000 元　D.4001-6000 元　E.6000 元以上

阳朔可持续发展调查问卷（外国游客问卷）

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, with a research about the sustainable tourism development of Yangshuo. The result is for academic research only, with no used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation.

Thank you very much for your support!

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

2. You came to Yangshuo as

A. An independent traveler B. Joining a tour group on your own C. Joining a tour group with friends or families

D. Joining a tour organized by your work organization E. During a conference F. Else_____

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

A. Newspapers and magazines B. Internet C. TV D. Travel agency

E. Tour Brochure F. Friends and relatives G. Else_____

4. What kind of information about Yangshou would you like to get? (Multiple choices accepted)

A. Traffic B. Accommodation C. Catering D. Scenic spot introduction E. Cost

F. Weather G. Culture H. Security I. Health J. Else_____

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

A. Sightseeing tourism B. Leisure vacation C. Business activities D. Official meeting

E. Company or unit incentive travel F. Religious worship G. Scientific investigation

H. Exploration I. Photography J. Relatives and friends K. Festival activities

L. Culture and food M. Else _____

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

A. Train B. Airplane C. Coach D. Self-driving E. Boat F. Else ____

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

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

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

A. 1-3 days B.4-6 days C. 7-15 days D. Over 15 days

9. Where do you live?

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

10. What's you travel budget per person?(Refering only to your personal spending)

A. less than 500 Yuan B.500-1000 Yuan C.1001-1500 Yuan D.1501—2000 Yuan E. more than 2000 Yuan

11. Which impresses you most?

A. Natural scenery B. Unique humanistic feelings C. Recreational atmosphere D. Hospitable people E. Climate conditions F. Local building H. Local tour guide

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

A. West Street B. Li River C. Scenery on the 20 yuan note D. Camel crossing the river E. Butterfly Fountain F. Totem Trail G. Jianshan Temple H. Big Banyan Tree I. Yulong River J. Moon Hill K. Longjing River Drifting Resort L. Yangdi Scenic Area M. Fuli Town N. Else_____

13. What kind of shops are you most interested in? (Multiple choices accepted)

A. Hotel B. Western restaurant C. Pub D. Clothing E. Crafts shop

F. Specialty store G. Video store H. Chinese restaurant I. Travel agency, tourism consulting service, ticketing agent J. Foreign language school K. Health care resort and spa H. Else _____

14. What did you buy in Yangshou? (Multiple choices accepted)

A. National dress B. Everyday item C. Handicraft D. Modern garments E. Specialty food

F. Creative good G. Did not buy anything H. Else _____

15. What is the main reason that you bought the goods? (Multiple choices accepted)

A. Required in journey B. For memorial C. Gifts for friends and relatives

D. Right price E. Novel design F. Introduction of friends G. Guide recommend

H. Shop assistant promote I. Else _____

16. Does Yangshuo meet your expectation?

A. Better than expectation B. The same as expectation C. Worse than expectation

17. Will you visit Yangshuo again?

A. Yes B. No C. Not sure

18. Will you recommend Yangshuo to friends or relatives?

A. Yes B. Not C. No sure

19.Have you watched the performance "Impression Liu Sanjie"?

A.Yes **B.**No（**Please jump to NO.21 directly**）

20. What "Impression Liu Sanjie"impresses you most?

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

Are you agree with the following（tick "√"where you agree）	Agree	Disagree
During watching，I concerned about the story of Liu Sanjie most		

During watching，I concerned about the performance in stage most		
After return, I will get further understanding of the story of Liu Sanjie		
The performance reveals the living condition of local residents		

21. **Please draw "√" on the appropriate option depending on you travel experience**

		Strongly agree	**Agree**	**Neutral**	**Disag-ree**	**Strongly disagree**
Tourism resources	Rich in natural resources, View in scenic pots is beautiful	5	4	3	2	1
	Water quality of Li River is high	5	4	3	2	1
	Water quality of Yulong River is high	5	4	3	2	1
	Cultural landscape has local amorous feelings	5	4	3	2	1
	Cultural landscape is well protected	5	4	3	2	1
	I can experience local food culture	5	4	3	2	1
	Yangshuo landscape tops that of Guilin	5	4	3	2	1
Social services	Food is characteristic	5	4	3	2	1
	I can buy satisfying souvenirs and crafts	5	4	3	2	1
	Ticket price of scenic spots is reasonable	5	4	3	2	1
	Food is healthy and safe	5	4	3	2	1
	Food price is reasonable	5	4	3	2	1
	Traffic is convenient	5	4	3	2	1
	Traffic sign system is clear	5	4	3	2	1
	Traffic fare is reasonable	5	4	3	2	1

	Living in accommodation (residential conditions) is safe and healthy	5	4	3	2	1
	Accommodation prices are reasonable	5	4	3	2	1
	Service of hotel and restaurant staff is good	5	4	3	2	1
	Service of scenic spot staff is good	5	4	3	2	1
	Service of interpretation in attractions is good	5	4	3	2	1
	Rich in recreational activities	5	4	3	2	1
	Service of souvenir shop staff is good	5	4	3	2	1
	Homogenization of tourist commodities /souvenirs are similar	5	4	3	2	1
	Fake and shoddy products exist in tourist commodities	5	4	3	2	1
	Price of tourism products is reasonable	5	4	3	2	1
	Efficiency of dealing with complaints is high	5	4	3	2	1
Tourism environment	Local residents are friendly	5	4	3	2	1
	Environment is clean	5	4	3	2	1
	Air condition is good	5	4	3	2	1
	Noise pollution is little	5	4	3	2	1
	Local security is good	5	4	3	2	1
	Commercialization is too much	5	4	3	2	1
	The overall l is satisfied	5	4	3	2	1

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

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

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

2. Age: A.<18 B.18-24 C.25-34 D.35-44 E.45-60 F.>60

3. Your educational level:

A. Primary school B. Junior middle school C. Senior middle school or technical secondary school

D. Junior college E. Bachelor F. Higher than bachelor

4.Your occupation:

A. Government agencies or institutions B. Companies or service industries staff C. Individual businesses

D. Researching or teaching E. Retirement F. Housewife G. Students H. Else _____

5. Your income per month:

A. <5000 Yuan B.5501-6500 Yuan C.6501-7000 Yuan C.7001—8000 Yuan D.>8001 Yuan

Thank you and bon voyage.

阳朔旅游可持续发展调查问卷（居民）

尊敬的女士/先生：

您好！我们是**联合国世界旅游组织（UNWTO）旅游可持续发展阳朔监测项目组**的调查员，对阳朔旅游发展相关问题进行调查。本调查成果仅用于学术研究，不会用于任何商业用途，所有问题均为**匿名回答**，请您根据自己的实际情况放心填写。非常感谢您的配合与支持！

1、请根据您对阳朔旅游发展影响的认知度和满意度，在您认为合适的选项上划“√”。

		非常不同意	不同意	没影响	同意	非常同意
	旅游业有利于我们当地的发展	1	2	3	4	5
	我能从旅游业中获益	1	2	3	4	5
旅游业对当地经济的影响						
1	旅游发展为我们带来了更多的就业机会	1	2	3	4	5
	参与旅游前相比，增加了经济收入	1	2	3	4	5
	我对自己的收入状况感到满意	1	2	3	4	5
	旅游业吸引了更多的投资与消费	1	2	3	4	5

		非常不同意	不同意	没影响	同意	非常同意
	旅游导致物价上涨	1	2	3	4	5
	旅游导致房价提升	1	2	3	4	5
	旅游使生活水平有了很大提高	1	2	3	4	5
	旅游只使少数人获益	1	2	3	4	5
旅游业对当地社会文化的影响						
	旅游导致了犯罪率的上升	1	2	3	4	5
	旅游者打乱了我们原本的生活	1	2	3	4	5
	旅游限制了我使用旅游景区资源	1	2	3	4	5
	旅游使基础设施得到很大的改进	1	2	3	4	5
	旅游使医疗设施和服务得到很大的改善	1	2	3	4	5
	旅游使老房子拆迁、新房子数量增多了	1	2	3	4	5
2	旅游促进了本地与外地的文化交流	1	2	3	4	5
	旅游对当地的自豪感与归属感增加	1	2	3	4	5
	民俗与传统文化被破坏和淡忘了	1	2	3	4	5
	旅游导致居民与游客的关系紧张	1	2	3	4	5
	旅游损坏了本地的道德风气	1	2	3	4	5
	文化活动或传统节庆增多	1	2	3	4	5
	更多人参与到传统文化弘扬中	1	2	3	4	5
	旅游促进了本地手工艺品发展	1	2	3	4	5
旅游对当地环境的影响						
	旅游使空气污染加重	1	2	3	4	5
	旅游使水体污染加重	1	2	3	4	5
	旅游使垃圾处理有效及时					
	旅游使噪声污染加重	1	2	3	4	5
3	旅游使固体废弃物增多	1	2	3	4	5
	旅游使社区、街道环境更干净了	1	2	3	4	5
	旅游发展使交通拥挤	1	2	3	4	5
	宾馆及其他旅游设施破坏了景观美	1	2	3	4	5

		非常不同意	不同意	没影响	同意	非常同意
	感					
	我认为保护自然环境很重要	1	2	3	4	5
	我愿意主动为景区发展提出建议	1	2	3	4	5
	景区做一些决策时会听取我们的意见	1	2	3	4	5
	我获得了政府实施的政策方针相关信息	1	2	3	4	5

2、您对**阳朔旅游发展的满意度**如何**？**

A.非常不满意　B.不满意　C.无所谓　D.满意　E.非常满意

3、您**是否支持**继续发展阳朔的旅游业**？**

A.非常反对　B.反对　C.无所谓　D.支持　E.非常支持

以下是您的个人资料，我们将以此为依据进行分类研究，请您填写，我们将为您保密

1、性别：A.男　B.女　**2、民族：**_____族

3、您的年龄： A.15 岁以下　B.15-24 岁　C.25-44 岁　D.45-60 岁　D.60 岁以上

4、您的居住地： _____乡/镇_____村

5、您的文化程度： A.小学及以下　B.初中　C.高中或中专　D.大学或者大专　E.硕士及以上

6、您平时是否有学习英语的习惯：A.是　B.否

7、您从事的工作为：_____　您的工作属于： A.全职　B.兼职

您的从业时间为：_____年_____月　您的从业地点为：_____

8、您每月的收入：

A.1000 元以下　B.1001—2000 元　C.2001—3000 元

D.3001—5000 元　E.5000—10000 元　F.10000 元以上

9、您每年的家庭收入为：_____（您每年的收入占家庭总收入的比例为：_____%）

10、您在本地的居住时间：A.1 年以下　B.1—3 年　C.4—6 年　D.7—10 年　E.10 年以上

谢谢您的合作！

居民访谈提纲：

对于当地的旅游发展，您觉得近年来最大的变化是什么？您最关心的问题是什么对于您所生活的地方的旅游发展，您有什么建议您知道什么是旅游可持续发展吗？如果知道，您怎样理解旅游可持续发展的？

一、经济

1、【从业情况】请问您或您的家人有从事旅游业的吗？具体做什么（i.e.手工艺、卖水果）？主业or副业？什么时候开始的？从业几年？从业的原因是什么？从业过程中是否遇到困难?（如政府政策、行业竞争）是如何解决的？

2、【收入情况】其他经济收入？（经济收入来源？）

3、【西街及商业化】西街近几年变化如何？您对西街现在的商业化状况怎么看？

二、社区

4、【社区参与】 对当地旅游的发展是否有建议权决策权监督权?是否有途径表达自己的意见?政府是否重视居民在旅游中的参与?（和表格中的最后几道题对应）希望以怎样的方式参与旅游？

5、【野导】请问您或您的家人朋友有从事非正式导游的吗？为什么从事？如何开始？您对这一现象怎么看？（野导群体内部的合作与竞争、利益分配、行业潜规则；政府对此有无采取措施）收费标准?通过何种途径接触游客?形式?(兼职,全职?)相对于以往职业,做导游的收入有多大的提升?

三、社会

6、【社会阶层】您认为阳朔现在的贫富差距怎么样？哪些原因造成的?你对现在的生活满意吗？在生活上遇到的困难？

7、【成长及教育】请问您学过英语或其它外语吗？为什么学？什么途径学（自学、培训机构、日常交流）？是否参加过旅游方面的培训？频率及支出？旅游发展对你个人能力有哪些方面的影响?还需再在哪方面继续提高旅游参与能力？

8、【婚嫁】请问您或您的家人朋友有跨国婚姻吗？您对这一现象怎么看？

四、文化

9、【文化及交流】你们是否保持当地着装、风俗、语言等文化特征？是否感到自豪？旅游有是否促进你们与外界的文化交流？您怎么看？

10、【信仰】请问您有什么宗教信仰吗？如何接触的？若有,其会影响你与其他人(朋友,游客等)的交往吗?

五、环境

11、【土地与拆迁】请问您家或您的周边有面临土地征收、房屋拆迁等问题吗？如果有：对您的生活有没有影响？您对此满意吗？政府采取了哪些措施（拆迁补偿、安置）？当地居民是否曾因土地问题与政府或企业发生过冲突?

12、【卫生医疗】你们的医疗保障措施做得怎么样？你希望有哪些改进？

13、【环境污染】您认为旅游开发后，环境如何？有无污染？周围环境变美了吗？当地居民的环保意识是否有提高?

阳朔旅游可持续发展调查问卷（业主）

尊敬的女士/先生：

您好！我们是**联合国世界旅游组织（UNWTO）旅游可持续发展阳朔监测项目组**的调查员，对阳朔旅游发展相关问题进行调查。本调查成果仅用于学术研究，不会用于任何商业用途，所有问题均为匿名回答，请您根据自己的实际情况放心填写。

非常感谢您的配合与支持！

1、企业位于:_____ 企业名称为:_____ 企业是面向：居民-------游客

2、企业主要涉及下面哪些服务？

□**住宿：** ①宾馆 ②招待所 ③家庭旅馆 ④其它；

□**餐饮：** ①普通中餐厅/馆 ②地方风味餐馆 ③西餐馆、酒吧或咖啡店 ④冷饮店

⑤餐饮摊点 ⑥其它；

□**娱乐：** ①歌舞厅 ②卡拉 OK ③保健休闲养生类 ④其它；

□**商品销售：**①纪念品 ②图书音像制品 ③百货 ④服饰 ⑤手工艺品 ⑥特产 ⑦其它；

□**租赁：**①交通工具 ②野外活动工具，如攀岩装备 ③其它；

□**旅游社：**①导游 ②订票 ③订房 ④其它

□**旅游项目(景点）**经营，具体内容是_____；

□**美容理发；**

□**照片冲洗；**

□**其他_____（以上为调查员填写项目）**

1、 贵企业提供的**产品（或服务）**主要体现了：

A.当地特色 **B.**西方特色 **C.**个性创意 **D.**其他_____

2、通常您企业的**旺季**是____月到____月。

3、您的企业是否有**雇工**？（选 B 请跳至第 8 题） **A.**有 **B.**没有

若有，则有雇工（ ）人；雇工中是**当地人**的有多少？_____；

旺季有雇工（ ）人，**淡季**有雇工（ ）人；**女性**雇工有（ ）人。

4、雇工的**学历**大多是：**A.**小学及以下 **B.**初中 **C.**高中或中专 **D.**本科或大专 **E.**硕士及以上

5、雇工上工前是否接受过培训**/训练**？_____若有，是否所有员工都接受培训_____，**培训方式**是_____,主要**培训内容**有哪些_____？目前聘请的员工是否能熟练使用英语?_____,招聘时，英语是否会成为必要的技能？_____

6、您的企业从何时起在此经营？_____经营了多长时间？_____

7、您最初来到此处**开店的目的**是什么？

A.喜欢这里的环境，追求一种生活方式 **B.**谋生 **C.**其它_____

8、您认为您所经营的企业目前的经营状况如何？

A.非常好 **B.**比较好 **C.**一般 **D.**比较差 **E.**非常差

9、您觉得对您企业经营**影响最大的因素**是_____（可多选）。

A.租金 **B.**雇工工资 **C.**货物成本 **D.**其他企业的竞争 **E.**游客消费能力 **F.**税收 **G.**政策

10、您是否同意以下关于阳朔的陈述，在您认为合适的选项上划“√”

	非常不	不同意	一般	同意	非常同

	同意				意
阳朔是一个**安全的地方**	1	2	3	4	5
阳朔是一个**宜居的地方**	1	2	3	4	5
阳朔是一个**值得投资**的旅游地	1	2	3	4	5
工作之余，阳朔的**休闲活动令我满意**	1	2	3	4	5
我认为西街**商业化氛围**太浓厚了	1	2	3	4	5
西街对游客的**吸引力在不断下降**	1	2	3	4	5

11、企业属于以下哪种**所有制形式**？

A.私人拥有 **B.**家庭拥有 **C.**两个或两个以上股东 **D.**连锁店

12、如果是租用别人的房屋经营，**月/年租金**是_____元。采用的是_____年租赁的形式。

13、企业是否有采取**节省能源/水资源**的相关措施？

A.有，什么措施_____ **B.**没有，但有打算 **C.**没有，且暂时没有打算

14、企业采取（或者不采取）节能/节水措施的**原因**是：_____

15、您是否了解什么是**“旅游可持续发展”**：

A.非常了解 **B.**稍稍了解 **C.**基本不了解 **D.**完全不了解

如果了解，则您获得旅游可持续发展相关知识的**渠道**是：**A.**政府部门的宣传

B.大众媒体宣传（电视、广播、报刊杂志等） **C.**专门的机构的宣传 **D.**其他_____

您认为**“旅游可持续发展”指的是**_____

以下是您的个人资料，我们将以此为依据进行分类研究，请您填写，我们将为您保密

1、您的性别为： A.男 **B.**女；

2、您的年龄为：A.15—24 岁 **B.**25—44 岁 **C.**45—64 岁 **D.**65 岁以上；

3、您的民族为： A.壮族 **B.**汉族 **C.**其它_____（请填写）；

4、您是否为当地人： A.是 **B.**否；

5、若不是当地人，请问来自：A.本县 **B.**桂林市 **C.**广西省内 **D.**国内其它地区_____

6、您的文化程度为： A.小学 **B.**初中 **C.**高中或中专 **D.**本科或大专 **E.**硕士及以上

7、您的月收入：A.1000 元以下　**B.**1001—2000 元　**C.**2001—3000 元　**D.**3001－5000 元

E.5001—10000 元 **F.**10001—30000 元 **G.**30001—50000 元 **H.**50000 元以上

8、除了经营旅游小企业外，还是否有其它的收入来源？_____

谢谢您的合作！

阳朔旅游可持续发展调查问卷（员工）

尊敬的女士/先生：

您好！我们是**联合国世界旅游组织（UNWTO）旅游可持续发展阳朔监测项目组**的调查员，对阳朔旅游发展相关问题进行调查。本调查成果仅用于学术研究，不会用于任何商业用途，所有问题均为匿名回答，请您根据自己的实际情况放心填写。

非常感谢您的配合与支持！祝您生活愉快！

1、您的工作地点_____，单位名称_____，从事的职业_____。

2、请在在您认为最合适的选项上划"√"：（5 表示非常同意，1 表示非常不同意）

	非常同意	同意	中立	不同意	非常不同意
我对自己的**工资水平**感到满意	5	4	3	2	1
我对企业的**奖金制度**感到满意	5	4	3	2	1
对于目前的**休假制度**感到满意	5	4	3	2	1
上级主管能够**客观评价**下属的工作业绩	5	4	3	2	1
上级主管在我工作遇到困难时会**帮助和指导**我	5	4	3	2	1
企业的用人提拔主要是**重学历**	5	4	3	2	1
我能够看到自己的**晋升前景**	5	4	3	2	1
我与周围的同事之间**配合默契**	5	4	3	2	1
我与周围的同事之间的**交流和沟通顺畅**	5	4	3	2	1
我的工作能够得到**家人的支持**	5	4	3	2	1
企业的各项规章制度能够得到**有效**	5	4	3	2	1

的执行					
企业对各部门的职责有**明确的规定**	5	4	3	2	1
我清楚了解企业的**经营状况**	5	4	3	2	1
我清楚了解企业管理层制定的**企业发展目标**	5	4	3	2	1
企业制定的**短期经营目标**能够得到有效的实施	5	4	3	2	1
我对工作场所的**舒适度**感到满意	5	4	3	2	1
我认为在**优美的景区环境**内会提高工作效率	5	4	3	2	1
我对自己的**工作**感到满意	5	4	3	2	1

3、这是您在阳朔的**第一份**工作？

A.是　　**B.**否，这是我的第____份工作

4、您来到此处**工作的原因**是什么？

A.喜欢这里的环境，追求一种生活方式　**B.**谋生　**C.**其它_____

5、您认为在阳朔，符合您要求的**就业机会是否足够多**？

A.是　　**B.**否

6、请问您是**如何获得**此份工作的？

A.自己寻找　**B.**亲友推荐介绍　**C.**当地社区、政府介绍

7、请问您是否计划离开**到外地工作**？

A.是，计划在_____年以内离开　　**B.**否

8、请问您是否有**转换工作**的意愿？

A.是，计划在_____年以内转换工作　**B.**否

9、请问您是否计划自己**创业**？

A.是，计划在_____年以内自己创业　**B.**否

10、请问您平时是否有**学习英语**的习惯？

A.是　　**B.**否

11、您的英语水平如何？

A.完全不会　B.听懂一点但不会讲　C.可以进行基本的交流　　D.熟练掌握

==========

以下是您的个人资料，我们将以此为依据进行分类研究，请您填写，我们将为您保密

1、您的性别为：A.男　　**B.**女；

2、您的年龄为：A.15—24 岁　**B.**25—44 岁　**C.**45—64 岁　**D.**65 岁以上；

3、您的婚姻状况为：□已婚　□未婚；

4、您的民族为：A.壮族　**B.**汉族　**C.**其它_____（请填写）；

5、您是否为当地人：

A.是，我在当地生活了_____年　**B.**否；**是否有家人在此处：**□是　□否

6、若不是当地人，请问来自：

A.本县　**B.**桂林市　**C.**广西省内　**D.**国内其它地区 _____

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A.小学　**B.**初中　**C.**高中或中专　**D.**本科或大专　**E.**硕士及以上

8、您的月收入：

A.1000 元以下　**B.**1001—2000 元　**C.**2001—3000 元

D.3001－5000 元　**E.**5001—10000 元　**F.**10000 元以上

9、除此份工作外，还是否有其它的收入来源？_____

10、您每月的家庭收入为：_____（**您每月的收入占家庭总收入的比例为：_____%**）

谢谢您的合作!

鸣谢

鸣谢：

总负责人：保继刚

技术负责人：孙九霞

技术组成员：

张蔼恒

王学基

黄凯洁

符玉林

潘新洁

陈威博

李俊平

吴思思

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黄宪立

刘晓丹

王珂

叶甜

张彤

林伊晴

刘佳文

高鹏

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桂林市旅游局

阳朔县人民政府

阳朔县旅游局

阳朔县工商局

阳朔县国土资源局

阳朔县投资促进局

阳朔县公安局

阳朔县气象局

阳朔县地税局

阳朔县环保局

阳朔县水电局

阳朔县物价局

阳朔县交通局

阳朔县文化体育局

阳朔县建设规划局

阳朔县疾控中心

阳朔县就业服务中心

阳朔县文联

玫瑰木商行

阳朔三姐国际旅行社

西唐户外运动策划有限公司

秘密花园酒店

Moondance Bout

李莎大酒店

西街外语学校

雪狮岭江畔酒店

大师傅啤酒鱼

月亮妈妈饭店

Monitoring Report on the Sustainable Tourism Development of Yangshuo

Guilin Municipal Tourism Bureau

Monitoring Center for UNWTO Sustainable Tourism Observatories

July 2014

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Chapter I Foreword

1.1 Origin

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

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

the monitoring in terms of sustainable tourism development of Yangshuo in October 2011, August 2012 and July 2013 respectively.

The monitoring of sustainable development of Yangshuo tourism (July 2014) is the extension and deepening of the monitoring previous years. On the basis of the *Indicators of Sustainable Development for Tourism Destinations*, this report points out the problems in the current and sustainable development of Yangshuo tourism, proposes some countermeasures to help the sustainable development of local tourism, and provides reference for the application of relevant indicators for UNWTO and other institutes engaged in tourism sustainable development.

1.2 Monitoring Process

On July 5 to 13, 2014, the Monitoring Center for UNWTO Sustainable Tourism Observatories (MCSTO), with the vigorous support from Guilin Municipal Tourism Bureau and the active cooperation with the People's Government of Yangshuo County, completed the monitoring of the sustainable tourism development of Yangshuo of 2014. The Monitoring Group was led by Professor Sun Jiuxia, the Deputy Dean of School of Tourism Management of SYSU, and the whole group consisted of 19 members, including two doctoral students, four graduate students and thirteen undergraduates.

During the nine-day monitoring, the Monitoring Group visited West Street, Ten miles Gallery (Butterfly Fountain, Ancient Totem Path, Big Banyan, Julong Lake, Gold Water Cave and Moon Hill), Yulong River, Early Paradise and other key scenic spots, investigated Licun, Old County Village, natural villages along Yulong River, Xingping and other tourism communities as well as Yangshuo urban area, carried out a questionnaire survey with Chinese and foreign tourists, community residents, small tourist business owners and employees and conducted random interviews for auxiliary analysis to collect the primary data. The Monitoring Group recollected 1885 valid questionnaires, including 820 filled out by domestic tourists, 280 by foreign tourists, 500 by community residents and 200 by employees. Besides questionnaire surveys and interviews, the Monitoring Group also conducted a general survey of commercial activities of Yangshuo County on July 11, mainly targeted on stores along 26 primary and secondary roads. The group collected the basic information of more than 2000 stores, including their names, types and functions. On July 12, the group visited Yangshuo County Tourism Bureau, Local Tax Bureau, Industrial and Commercial Administration, Public Security

Bureau, Land Resources Bureau, Environmental Protection Bureau, Meteorological Bureau, Health Bureau, Culture and Sports Bureau and other government authorities to collect relevant secondary sources. In addition, this monitoring program included "the Search of Yangshuo Stories". The group conducted in-depth interviews with and writing stories on famous people related to Yangshuo tourism, such as Mama Moon, Lu Jiahua, and Annabelle.

In addition to regular monitoring work, the Monitoring Group also organized in-depth and face-to-face communication activities for local government and entrepreneurs. On July 6, Professor Zun Jiuxia and Liu Hongfa, a teacher in the observatory had discussion with leaders in the Yangshuo County Tourism Bureau, and exchanged opinions on the arrangement of the future monitoring work of Yangshuo and the development of Yangshuo tourism. On the morning of July 8, the Monitoring Group visited the Early Paradise. Mr. Jiang Wenhao, chairman of the Guilin Taiwanese Investment Association, and general manager of Early Paradise scenic spot conducted a case-based teaching on field trips, sharing the successful management mode and experience in terms of culture creativity and quality service.

On the afternoon of July 8, the Monitoring Center and Yangshuo County Tourism Bureau organized a salon called “Salon for Small and Micro Enterprises of Yangshuo: the New Trend of Tourism at Home and Abroad”. The salon was presided over by Professor Sun Jiuxia, and a lot of people attended the salon, including representatives of Yangshuo County Tourism Bureau, some owners of small and micro enterprises, as well as community elites. These community elites includes Li Sha and her husband, owner of Yangshuo Lisa's Hotel, Feng Ziying (Ian), owner of Secret Garden Boutique Hotel, Huang Jialei, owner of Rosewood chain stores, and Ou Pu, principal of West Street Foreign Language School. The salon aimed to discuss problems of and seek solutions for the development of Yangshuo tourism. The Monitoring Group also attended the salon. During the salon, owners of small and micro enterprises expressed their opinions on issues they found during their participation in Yangshuo tourism: the foreign investor Roland pinpointed that the friendliness and simplicity of Yangshuo was fading out, and some businessmen didn’t know the demand of tourists while some tourists didn’t trust tourism service providers, which was an embarrassing situation. Xi Tang, owner of Outdoor Sports Planning. Ltd, mentioned that Yangshuo enjoyed abundant outdoor tourism resources and the most and best routes of rock climbing in China. He thought a pity that Yangshuo governments had not yet promote its brand of outdoor experiential tourism, and suggested

that more competitions, activities and other marketing methods be carried out to promote the Yangshuo's image. Other elites also shared their opinions on problems including the traffic congestion of Yangshuo County, high mobility of service staff, lack of standards for service within hotels, disorder of the public participation in tourism and other issues. Mo Gaoyang, chairman of Yangshuo Literacy and Art Circles said that the local government should change the way of development, improve the quality of management and service and, at the same time, regain the support of regional culture for tourism, remove folklores and find the real identity of Yangshuo. The former director of Yangshuo Tourism Bureau Zhou Xunlin pointed out that the current government should integrate and utilize the resources of Yangshuo. In addition, participants of the salon reached a consensus on the upgrading of Yangshuo tourism development mode, which was a transformation to a customized and experiential one.

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

Covering the topics and basic indicators on the monitoring of sustainable development of Yangshuo tourism, this monitoring report was prepared by reference to the screening of key issues and indicators of 2013, WTO key performance indicators, previous Yangshuo monitoring indicators and the actual situation of Yangshuo tourism development of 2013.

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

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

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

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

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

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

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

Chapter II Tourism and Community

2.1 General

In this round of monitoring, a total of 500 questionnaires were distributed to residents from July 5, 2014 to July 12, 2014 in West Street, Guihua Road, Kangzhan Road, Yangshuo Park, Fuqian Road, Shima Yuanpan, Xiatang Wharf, Old County Village and other areas, and 468 out of 500 questionnaires are valid, accounting for 93.6%.

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

Here is the preliminary result from the questionnaires collected: The residents generally believe that tourism can drive the development of local economy, but it will also destroy the local natural environment to some degree. Although Yangshuo residents support the development of tourism, their satisfaction level is quite low, and shows a downward trend. The low education level and the commercial awareness of local residents limit their going deep into the tourism industry. Most of the residents believe that the development of tourism in Yangshuo has accelerated the exchange of cultures, increased cultural activities and festivals, and engaged more people to promote Chinese traditional culture.

2.2 Community Monitoring Indicators

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

Table 2-1 Community monitoring indicators

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

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

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

2.3 Indicator Introduction and Analysis

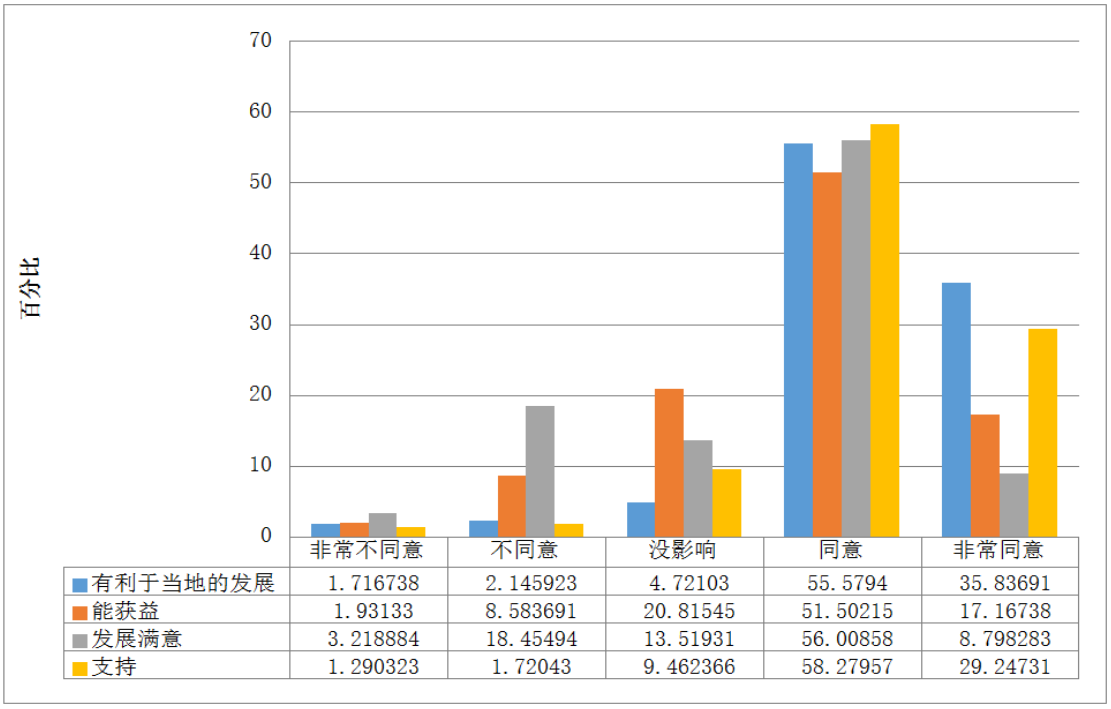
In this round of monitoring, a random questionnaire survey was conducted on residents in Yangshuo County, with 468 valid questionnaires collected. The survey samples, which are basically the same with those of last year, are relatively reasonable. Here is the basic information: The male to female ratio is 1:1.22, most of them aged between 15 and 44, accounting for 77.44% of the total; of all respondents, 34.59% are aged between 15 and 24, 42.86% are aged between 25 and 44. 17.29 are aged between 45 and 60. In addition, the proportion of research objects is slightly unbalanced because of the various education degrees of respondents as well as other reasons. Only 5.26% of the respondents are under 15 or above 60. 70.07% of residents have an education background of middle school or high school (including technical secondary school or junior college); 82.20% of the respondents have been living in Yangshuo for more than 10 years.

The community monitoring indicators reflect the perception of local residents to social and cultural, economic and environmental impacts brought by tourism development. In the indicator analysis, to further reflect the attitude of residents to these impacts, the percentages or values of

"strongly agree" and "agree" in the attitude scale are classified as one "agree", while the percentages or values of "strongly disagree" and "disagree" are classified as the other "disagree".

2.3.1 Residents' Perception of and Evaluation on Tourism Development

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



	非常不同意	不同意	没影响	同意	非常同意
有利于当地的发展	1. 716738	2. 145923	4. 72103	55. 5794	35. 83691
能获益	1. 93133	8. 583691	20. 81545	51. 50215	17. 16738
发展满意	3. 218884	18. 45494	13. 51931	56. 00858	8. 798283
支持	1. 290323	1. 72043	9. 462366	58. 27957	29. 24731

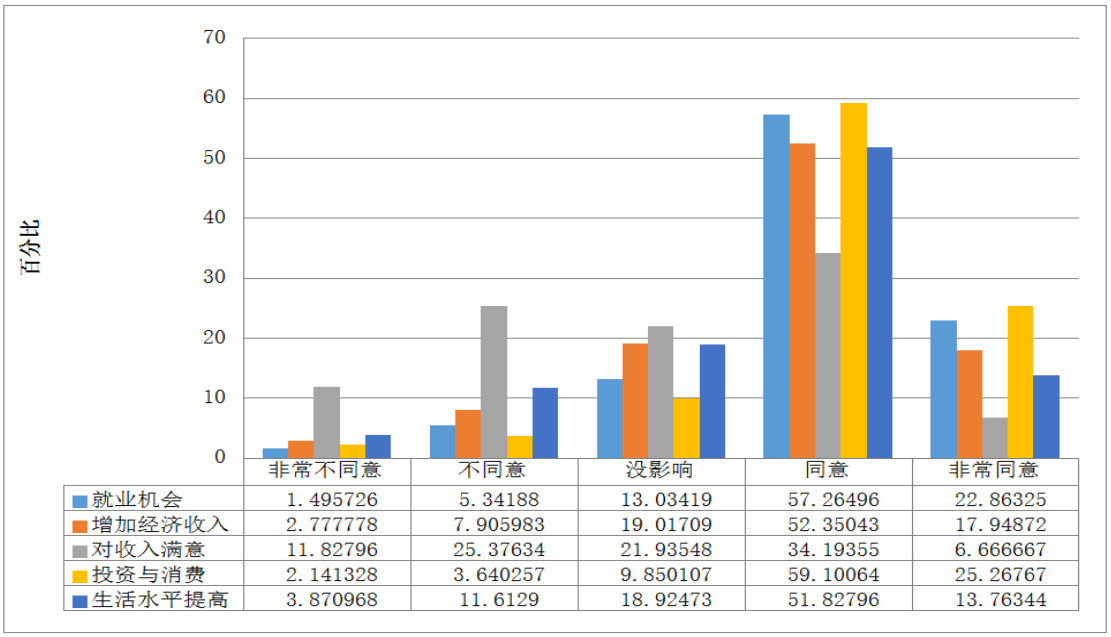
Figure 2-1 Overall perception of Yangshuo residents to tourism development

Figure 2-1 reflects the overall perception of Yangshuo residents to tourism development. It can be seen from the data that 91.42% of residents think tourism is good to local development; 68.67% think they benefit from tourism; 64.81% are satisfied with Yangshuo's tourism development; and 87.53% express their willingness to support Yangshuo's sustainable tourism development. Only a few residents hold a negative view on the first, second and fourth questions, accounting for 3.86%, 10.52% and 3.01% respectively. 21.67% of residents are not satisfied with the tourism development of Yangshuo.

It is showed in figure 2-1 that the portions of “agree” and “strongly agree” are large, which indicates that many residents think tourism is good to local development and they benefit from tourism. The majority of residents are satisfied with and support local tourism development. However, more than one fifth of the residents are not satisfied with the development of Yangshuo tourism, with the satisfaction rate up by 2.87% comparing to the same period in 2013.

2.3.2 Residents’ Perception of and Evaluation on Economic Impacts of Tourism

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

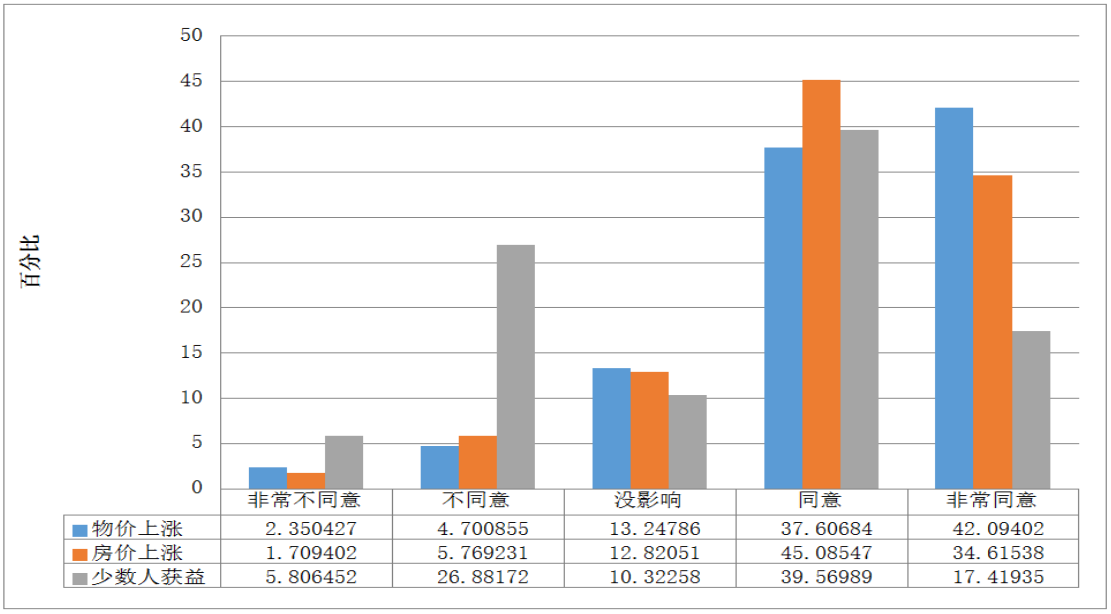


	非常不同意	不同意	没影响	同意	非常同意
就业机会	1. 495726	5. 34188	13. 03419	57. 26496	22. 86325
增加经济收入	2. 777778	7. 905983	19. 01709	52. 35043	17. 94872
对收入满意	11. 82796	25. 37634	21. 93548	34. 19355	6. 666667
投资与消费	2. 141328	3. 640257	9. 850107	59. 10064	25. 26767
生活水平提高	3. 870968	11. 6129	18. 92473	51. 82796	13. 76344

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

It can be seen from figure 2-2 that the residents have a high positive evaluation on economic impacts of tourism. Most of them think that tourism brings a positive impact on job creation, investment attraction and life improvement. 84.37% and 80.13% of residents hold a positive view on

"tourism has attracted more investment and consumption" and "tourism development has brought more job opportunities". 70.3% think tourism development has increased economic income. 65.59% agree that tourism has greatly improved the living standard. Only 40.86% are satisfied with their income and 37.2% are not satisfied with it.



	非常不同意	不同意	没影响	同意	非常同意
物价上涨	2. 350427	4. 700855	13. 24786	37. 60684	42. 09402
房价上涨	1. 709402	5. 769231	12. 82051	45. 08547	34. 61538
少数人获益	5. 806452	26. 88172	10. 32258	39. 56989	17. 41935

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

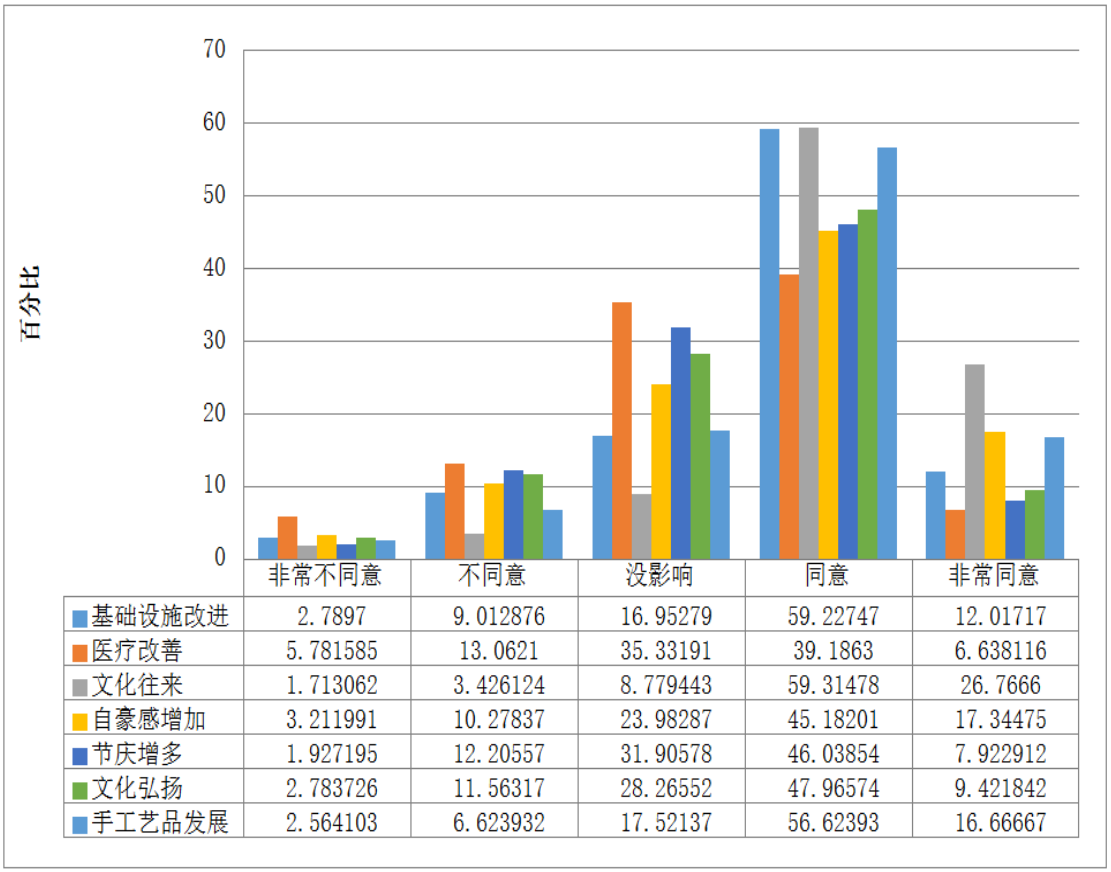
Figure 2-3 reflects the negative evaluation of Yangshuo residents on economic impacts of tourism. 79.7% of residents think that tourism development has led to price hike; 56.99% think that tourism development has led to rise of housing price and 49.8% think that tourism only benefits a few people. Most of the respondents agree that tourism has led to price hike and rise of housing price, however, large differences exist concerning the saying "tourism only benefits a few people". 32.69% oppose that saying, 10.32% remain neutral and 56.99% agree with that saying.

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

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

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

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



	非常不同意	不同意	没影响	同意	非常同意
基础设施改进	2.7897	9.012876	16.95279	59.22747	12.01717
医疗改善	5.781585	13.0621	35.33191	39.1863	6.638116
文化往来	1.713062	3.426124	8.779443	59.31478	26.7666
自豪感增加	3.211991	10.27837	23.98287	45.18201	17.34475
节庆增多	1.927195	12.20557	31.90578	46.03854	7.922912
文化弘扬	2.783726	11.56317	28.26552	47.96574	9.421842
手工艺品发展	2.564103	6.623932	17.52137	56.62393	16.66667

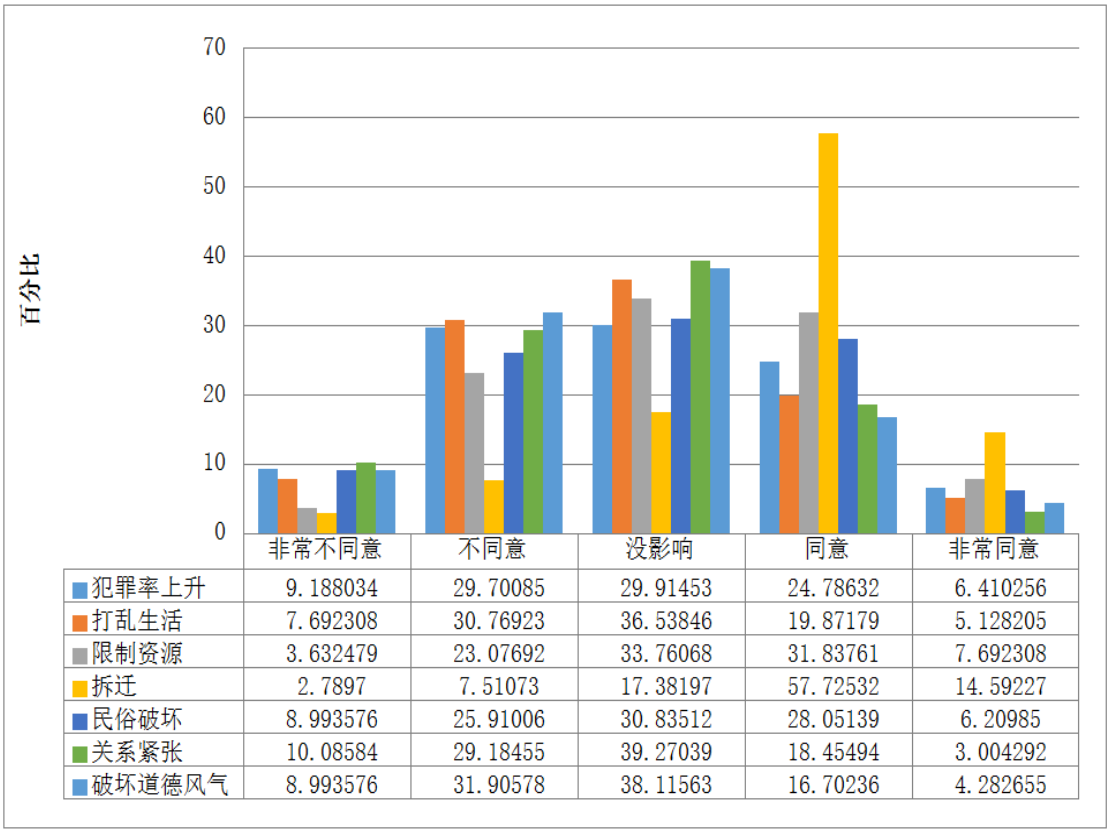
Figure 2-4 Positive evaluation of residents on social and cultural impacts of tourism

The 7 indicators in figure 2-4 show the positive evaluation of Yangshuo residents on social and cultural impacts of tourism. A large proportion of residents choose “agree” and “strongly agree”. Most of residents think tourism has greatly improved infrastructure and agree that tourism has promoted cultural exchanges with outside world as well as local handicraft development. From an overall perspective, the “agree” percentage of these 6 indicators (except “medical care improvement”) exceeds 50%. In terms of “improving medical care”, only 45.82% of residents express agreement, which could be because the establishment of medical system is not very closely related to tourism development.

It can be seen from figure 2-4 that 86.08% of residents think tourism has promoted cultural exchanges with outside world, 73.29% think tourism has promoted local handicraft development, and 71.24% think tourism has greatly improved infrastructure.62.23% of residents think that their sense of identity and pride as Yangshuo residents has been strengthened with the growing popularity of

Yangshuo as a tourist destination. 57.93% of residents think the development of Yangshuo tourism is beneficial to the promotion of Yangshuo culture. 53.69% of residents agree that the development of Yangshuo tourism has enriched the local festival activities. Residents who disagree with these 7 indicators account for a little more than 10%, which is a relatively low proportion. Regarding "tourism has greatly improved medical facilities and services", 18.84% hold a negative view while 35.33% remains neutral, which indicates indirectly that the tourism development doesn't cause Yangshuo to carry out significant adjustment to its medical system.

2.3.3.2 The Perception of Negative Social and Unclear Cultural Impacts on Tourism



	非常不同意	不同意	没影响	同意	非常同意
犯罪率上升	9. 188034	29. 70085	29. 91453	24. 78632	6. 410256
打乱生活	7. 692308	30. 76923	36. 53846	19. 87179	5. 128205
限制资源	3. 632479	23. 07692	33. 76068	31. 83761	7. 692308
拆迁	2. 7897	7. 51073	17. 38197	57. 72532	14. 59227
民俗破坏	8. 993576	25. 91006	30. 83512	28. 05139	6. 20985
关系紧张	10. 08584	29. 18455	39. 27039	18. 45494	3. 004292
破坏道德风气	8. 993576	31. 90578	38. 11563	16. 70236	4. 282655

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

The 7 indicators in figure 2-5 show the negative evaluation of Yangshuo residents on social and cultural impacts of tourism. It can be seen from the figure that except the indicator "tourism has increased the quantities of demolished old houses and newly built houses", the options "disagree" and "neutral" account for a large proportion. This indicates that the perception of residents to negative social and cultural impacts of tourism is not obvious.

According to the statistics, only 20.99% of residents think that tourism has ruined the local moral situation, 21.46% agree that tourism has caused the tension between residents and tourists, and only

25% of residents think that tourism has disturbed their former lives. In terms of social security, 31.2% of residents think that the increasing inflow of people brought by tourism will increase the crime rate of Yangshuo, but 38.89% of residents hold opposite views thereon. In addition, 39.53% of residents think that the growing number of tourists will take up their resources. In terms of society and culture, 34.36% of residents worry that tourism development will destroy folk customs.

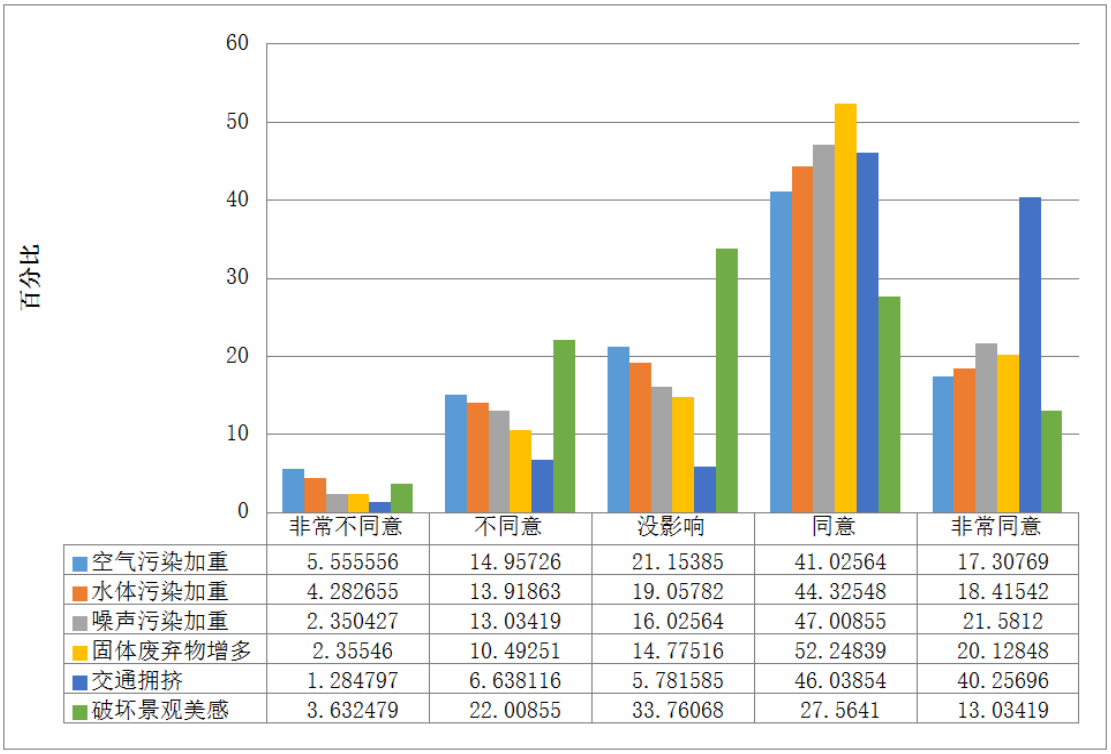
Generally speaking, the residents have a relatively low perception to the negative social and cultural impacts brought by tourism growth. There is one exception: 72.32% agree that tourism has increased the quantities of demolished old houses and newly built houses and only 10.3% hold an opposite view thereon.

Regarding “moral situation”, the interview result shows that most of residents think that with the tourism development, the once simple and hospitable residents have become snobbish and hypocritical since they engaged in tourism business and their business contact with tourists became frequent. At the same time, due to the increasing revenue brought by tourism, residents start to demolish old houses and build new ones in a large scale, and, as a result, the cultural features of Yangshuo is gradually reduced.

2.3.4 Perceptual Evaluation of Residents on Environmental Impacts of Tourism

2.3.4.1 Increasing Tourism Activities Has Exacerbated Environmental Pollution

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



	非常不同意	不同意	没影响	同意	非常同意
空气污染加重	5. 555556	14. 95726	21. 15385	41. 02564	17. 30769
水体污染加重	4. 282655	13. 91863	19. 05782	44. 32548	18. 41542
噪声污染加重	2. 350427	13. 03419	16. 02564	47. 00855	21. 5812
固体废弃物增多	2. 35546	10. 49251	14. 77516	52. 24839	20. 12848
交通拥挤	1. 284797	6. 638116	5. 781585	46. 03854	40. 25696
破坏景观美感	3. 632479	22. 00855	33. 76068	27. 5641	13. 03419

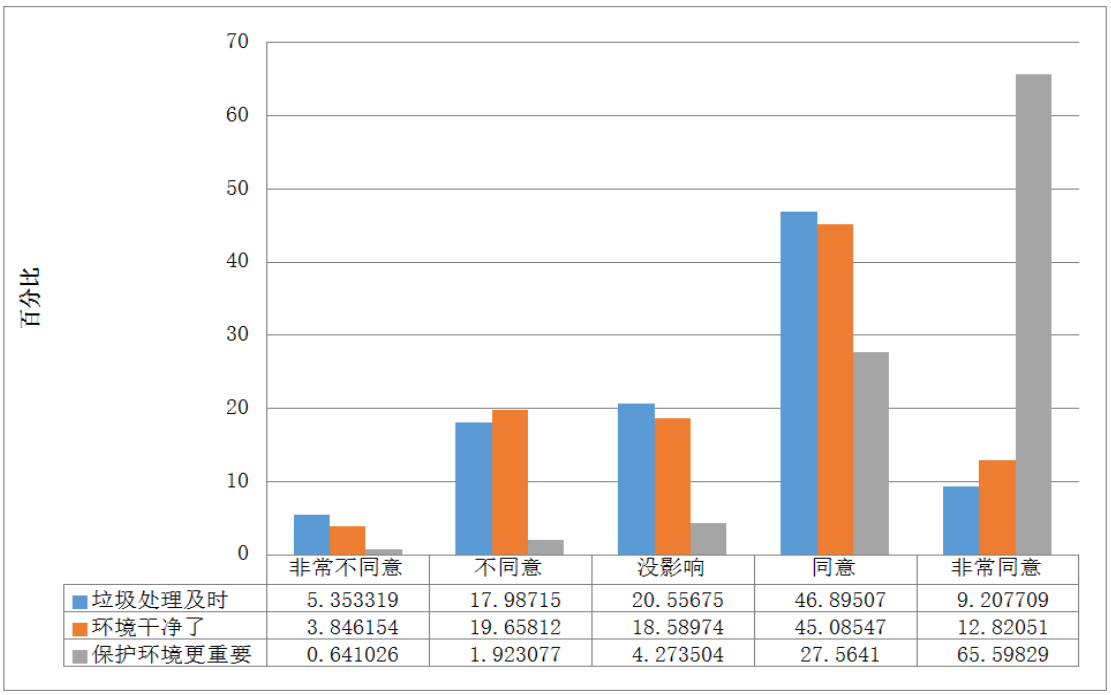
Figure 2-6 Negative evaluation of residents on environmental impacts of tourism

According to figure 2-6, most of residents think that tourism development has deteriorated local air and water, exacerbated noise pollution and increased solid wastes. The perception to noise pollution and solid waste pollution is the strongest. 72.38% of residents think that tourism has increased solid wastes. 68.59% of residents think that tourism has aggregated noise pollution, 62.74% think that tourism has aggregated water pollution and 58.33% think that tourism has aggregated air pollution. Generally speaking, most residents think tourism has brought a negative impact on environment.

Regarding “guesthouses and other tourism facilities have ruined landscape aesthetics”, 40.6% agree on that point, an increase of 11.2% comparing to the same period of last year.

However, 33.76% of residents remain neutral and 25.67% hold an opposite view thereon. This is the indicator with inconsistent opinions.

2.3.4.2 The Improved Environment of Yangshuo and the Enhanced Awareness of Residents on Environmental Protection



	非常不同意	不同意	没影响	同意	非常同意
垃圾处理及时	5. 353319	17. 98715	20. 55675	46. 89507	9. 207709
环境干净了	3. 846154	19. 65812	18. 58974	45. 08547	12. 82051
保护环境更重要	0. 641026	1. 923077	4. 273504	27. 5641	65. 59829

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

According to figure 2-7, 56.1% of residents think the wastes are disposed on a timely and efficient manner and 57.91% think the environment is cleaner than before. This indicates that although tourism development has deteriorated air quality and worsen water and solid waste pollutions, the local environmental protection measures have been strengthened. In addition, 93.16% of residents think that natural environment protection is important, which indicates the majority has a relatively high awareness on environmental protection.

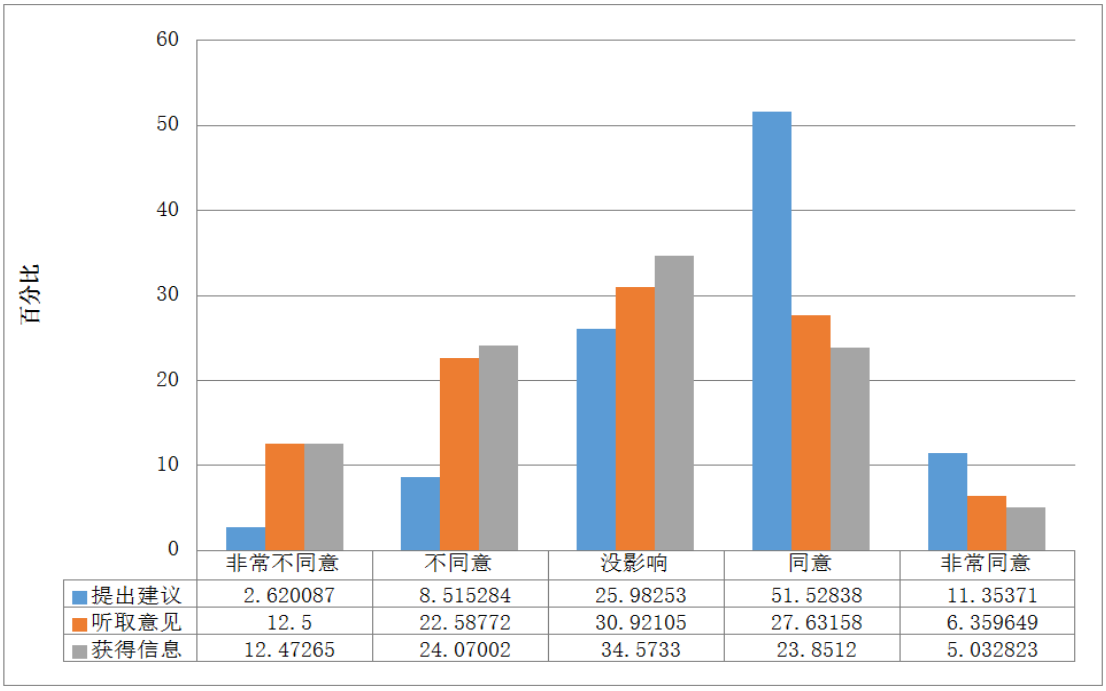
2.3.5 Community Engagement

The percentage of community residents doing tourism-related jobs reflects the degree of community engagement; whether residents are willing to actively give advice on scenic zone development reflects the depth of community engagement; whether tourism decisions incorporate resident opinions and whether residents can obtain information on relevant government policies reflect the accessibility of community engagement. The residents' attention to and advice on tourism development reflect the awareness of community engagement.

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

The jobs of the respondents are classified into three categories: “tourism-related”, “nothing to do with tourism” and “unemployed”. Residents who have tourism-related jobs accounts for 49.2%, and most of them are F&B service attendants, bamboo rafting staff, tour guides, hotel staff, self-employed businessmen (whose work is mainly tourist-oriented), etc. 49.2% residents are taking jobs non-related to tourism. The unemployed account for around 8%. The jobs of the respondents show that not many residents are engaged in tourist industry and a few of their job requires advanced technologies, so there is still a large room for improvement. Besides, the questionnaire data show that 78.65% of residents have full-time jobs while 25.35% only have unstable part-time jobs.

2.3.5.2 Residents Have a Relatively Strong Awareness on Participation in Tourism Decision Making, but with Limited Participation Channels



	非常不同意	不同意	没影响	同意	非常同意
提出建议	2. 620087	8. 515284	25. 98253	51. 52838	11. 35371
听取意见	12. 5	22. 58772	30. 92105	27. 63158	6. 359649
获得信息	12. 47265	24. 07002	34. 5733	23. 8512	5. 032823

Figure 2-8 Resident participation in tourism decision making

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

It is clear from the figure that 62.88% of residents in Yangshuo are willing to provide advice on the development of the scenic zone and participate in tourism decision making. This indicates the local residents have a relatively high awareness on participation in tourism development. Regarding the indicators of "some decisions of the scenic zone incorporate our advices", and "I've received information on government policies", the percentage of "disagree" (35.09% and 36.54% respectively) is higher than the percentage of "agree" (33.99% and 28.88% respectively). This indicates that residents still have significant difficulties in obtaining information on government policies and having their advices and suggestions received by the government.

Therefore, regarding the resident participation in tourism decision making, it can be concluded that residents are not deeply involved in local tourism industry, but they have a relatively high willingness and awareness on participation in tourism development. In contrast to the relatively high participation willingness, residents' right to make suggestions and decisions is still insufficient, and they still many difficulties in obtaining information of policies.

2.4 Typical Community Case Analysis

2.4.1 Old County Village

Old County Village is located along the riverside of Baisha Town. It features the art of architectures of China in different dynasties: the walls of the Tang Dynasty, ancient buildings of Ming and Qing Dynasties as well as buildings of the Cultural Revolution period. Old County Village also has special hotels and inns such as Lao Gen Farmhouse Restaurant and Secret Garden Boutique Hotel, some of which were originally located at West Street.

A total of 80 copies of the questionnaires have been distributed during the survey. Among the 80 respondents, male account for 42.5%, female account for 51.3%, and those who refuse to fill out the questionnaire account for 6.3%.

2.4.1.1 Economic Impact

Residents highly recognize that tourism can promote the local economic development, but they have low recognition of its ability to improve individual economic capacity. 96.1% of residents think that tourism can boost local development, but only 82.1% of residents believe that they can benefit

from the tourism industry. Residents have similar perception of the positive effect of tourism, even those who don't benefit from tourism. More than 80% of the residents agree that tourism brings more employment opportunities, attracts more investment and increases consumption.

38.8% of residents in Old County Village has monthly income below 1000 Yuan, and 27.5% has monthly income ranging from 1001 to 2000 Yuan. In other words, more than 6% of the local residents get monthly income below 2000 Y. Although residents have generally low income, 59.9% of them are satisfied. The increase of income is accompanied with the rise of prices of commodities and houses. Most residents agree that their living standard has been improved, but 17.1% of residents disagree or strongly disagree with that, which is worth mentioning.

Compared with other communities, residents of Old County Village are easier to be satisfied and benefit more from tourism. A larger proportion of residents of Old County Village agree that they can benefit from tourism, nearly 12% higher than that of Yangshuo. Although many residents in Old County Village are still engaged in agriculture, they get more benefits from tourism than the average of Yangshuo. 59.9% of residents are satisfied with their monthly incomes, nearly 20% more than the proportion of Yangshuo, though their monthly incomes are relatively low. This indicates that residents of Old County Village are easier to feel satisfied, and they are generally simple.

2.4.1.2 Social and Cultural Impact

The social infrastructure of the Old County Village has been improved a lot, and residents have strong local identity. However, the culture promotion and communication needs to be strengthened. In terms of social infrastructure, 80% of residents agree that the infrastructure has been improved. In terms of medical care, only 50% of residents recognize the improvement, other residents remain neutral or express disagreement. Both of the percentages of residents who express agreement regarding the above two aspects are high than that of the whole Yangshuo. In the aspect of culture, nearly 8% of residents do not agree that tourism has promoted cultural exchanges. Tourism does play a prominent role in cultural exchanges, but 4.1% of Yangshuo residents do not agree with that. Old County Village has better performance in cultural exchange, which is probably due to its different process of tourism development with that of Yangshuo. Recent years have seen an increase of cultural exchange as people from other provinces and some foreigners gradually move from the West Street to the Old County Village. In terms of the development of folk customs, festivals, cultural promotion

and handicrafts, residents of Old County Village have inconsistent views. Residents who disagree, remain neutral and agree take up almost the same proportion. Overall, Yangshuo residents agree that local culture has been promoted, handicrafts have been developed and festival activities has increased. The Old County Village, however, needs to do more on culture promotion as its tourism develops relatively late. 76.3% of residents of the Old County Village believe that new houses have been increased, 4% higher than the average level of Yangshuo. With the development of social economy, it's inevitable for people to demolish old houses and build new one for a more comfortable and convenient lives. However, the old buildings in Old County Village are a new tourism resource, as they presents historical features of Yangshuo. These old buildings need to be protected and utilized reasonably, and the Old County needs to do more in this regard. 71.1% of residents believe that the sense of pride has increased, 10% higher than the average level, showing that residents of Old County Village have obtained strong local identity. Residents hold inconsistent views on resource constraints and the relationship between tourists and residents. More than half of the residents think that there is neither rise in crime rate nor disturbance in their lives. Nearly 60% of residents think morality has not been destroyed. Both the percentages are higher than the average level, probably because the development of Old County Village is relatively late, and there are not many tourists, so local residents are simple and the commercial impact from outside is limited.

2.4.1.3 Environmental Impact

The environmental pollution of Old County Village is less than that of other parts of Yangshuo. In terms of pollution, 40% of residents agree that tourism development deteriorates local air and water, exacerbates noise pollution and increases solid wastes, and around 20% of residents remain neutral towards these aspects respectively. 85.6% of residents think tourism development leads to traffic congestion. Although the percentages are high, they are still lower than the average level of Yangshuo. This is because the Old County Village has fewer tourists, as Old County Village is not included in the schedules of many travel agencies. But at the same time, 69.7% of residents believe that the local environment has been improved, which seems to be a bit contradictory and might be the result of the timely and effective garbage disposal. Residents also hold inconsistent opinions on whether travel facilities damage the beauty of landscapes. 94.8% of residents think environmental protection is important and no one strongly disagrees with this point of view, showing the strong awareness of

environmental protection of residents in Old County Village. This is because the tourism development of Old County Village is mainly dependent on landscapes and buildings instead of commerce like West Street.

2.4.1.4 Participation Channels and Enthusiasm

Residents of Old County Village have limited participation channels and their awareness about participating in tourism decision-making is weak, but they have strong awareness of supporting tourism. Half of the residents think they can't get information from governments. 43.8% of residents think heads of scenic spots will not listen to their views, 14% higher than the average level of Yangshuo. Residents of the Old County Village has limited participation channels and information access, and those who are willing to put forward suggestions account for only 55.1%, below the average level of Yangshuo. This probably because the generally low education level of residents in the Old County Village, most of whom never go to high school. Although the participation channels are limited, all residents show great support to tourism development.

2.4.2 Xingping Ancient Town

Xingping Ancient Town is renowned for its beautiful scenery and is an important tourist destination in Yangshuo, one of the "Famous Tourism Counties in China". Xingping Ancient Town is 25 kilometers from the county, and it has famous tourist spots such as Painted Hill of Nine Horses, Huangbu Beach, and Luosi Mountain. There is also a mysterious ancient village, Fishing Village, which was once visited by two presidents (Sun Yat-sen and William Jefferson Clinton). The beautiful scenery of Xingping is also printed on the twenty-Yuan RMB banknote of the 1999 version. Due to remote geographical location and poor infrastructure, Xingping have small amount of tourists and they usually don't stay overnight. The commercial atmosphere is not very strong in Xingping and many local residents still keep their former lifestyles. Some senior citizens who don't want to be bothered by tourists put up a sign where reads 5 Yuan for taking pictures. Many local residents sell homegrown fruits and vegetables in the street at reasonable prices, but their businesses are not so good. Xingping is on the early stages of tourism development, just like the West Street in the 1980s or 1990s. During the survey, 78 questionnaires have been distributed. Among the respondents, male account for 39.7% and female account for 55.1%, while the rest to refuse to fill out the questionnaire.

2.4.2.1 Existing Problems

(1) Unbalanced Tourism Development, Limited Interest and Weak Sense of Pride of Local Residents

In this research, 61.5% of residents agree or strongly agree that only a small number of people benefit from tourism, much higher than the 47.5% of the Old County Village and the 57% of the average level of Yangshuo County. It indicates that tourism development in Xingping is still unbalanced. First of all, not many tourists go to Xingping. Due to limited time, many tourists do not necessarily go to Xingping. Secondly, because of the lack of facilities, tourists basically do not stay overnight and have short staying time there. For these reasons, tourists in Xingping usually go bamboo rafting in Lijiang River only, or stroll at the main old streets for a short time. Therefore, tourism brings impact on small territorial scope. In addition, rafts are under the unified management of a Lijiang River rafting company, so it's hard for residents to be engaged in tourism commerce. Even they get access to those business, they don't get much income. As a result, interest brought by tourism is limited and only a small number of people benefit from tourism.

In Xingping, 56.4% of residents agree or strongly agree that they feel proud of Xingping, lower than the 71.1% of Old County Village and the 62.5% of the average level. One reason is that the number of tourists is small. Many local young people work outside of Xingping, leaving the elderly and children at home, so residents generally know the development level and environment of other places. When comparing Xingping with other places, their sense of pride and local identity of Xingping decreases.

(2) The Slow Improvement of Infrastructures; the Poor Reception Capacity and Accessibility

In this research, 67.9% of residents agree or strongly agree that the infrastructures have been improved, lower than the 80.3% of Old County Village and the 71.3% of the average level. The rough road to Xingping and old streets in Xingping are currently under maintenance. Hotels and other reception facilities are being built by the old streets. Through interviews, the Monitoring Group knows that the infrastructure of old streets in Xingping has been improved a lot, but there is still large room for improvement when compared with other places.

(3) The Serious Environmental Pollution; Strong Awareness of Environmental Protection of Residents.

Most residents believe that water pollution and noise pollution has increased, and problems of traffic congestion and solid waste become more serious. Residents say that some tourists throw drink bottles into Lijiang River intentionally or by accident. Hotels under construction need tractors to transport materials, which further aggravate the traffic congestion and noise pollution. 96.2% of the residents recognize the importance of environmental protection, higher than the 92.2% of the average level and that of Old County Village, indicating Xingping residents' strong sense of environmental protection.

(4) Strong Awareness and Limited Channels of Residents in Participating in Decision-making.

More than 60% of residents are willing to give suggestions for the development of scenic spots, but only 25.6% of residents agree that heads of scenic spots will listen to their opinions, lower than the percentage of Old County Village and the 34% of the average level. The development of scenic spots ignores the suggestions of local residents, and residents generally don't know to whom they can put forward their suggestions.

2.4.2.2 Positive Aspects

(1) The Houses are Well Protected

Residents' perception of the number of demolished houses is low, accounting for only 66.7%, lower than the 76.3% of the Old County Village and the 72.3% of the average level. This indicates that Xingping has done a better job in house protection than other places. This may also indicates that the living standard of residents around the village is not high, so they don't have money to build new houses. According to the interviews, the renovation or demolition of old buildings by the old streets needs government approval. The government is doing very well in house protection in view of the fact that antique atmosphere and old buildings are key factors attracting tourists.

(2) The Proportion of Residents' Participation in Culture Promotion is High, and the Handicrafts Develop Well

62.8% of residents agree or strongly agree that more people should be involved in traditional culture promotion, a percentage higher than that of the 57.4% of the average level. On December

2013, Lijiang River Fishing Festival was held in Xingping, which largely had greatly raised local residents' awareness of traditional culture promotion. Festival activities play an important role in traditional culture promotion. In terms of the handicraft development, 80.8% of the residents agree or strongly agree that tourism promote the development of handicrafts, higher than the 56.6% of Old County Village and the 73.3% of the average level. In some interviews, residents believe that handicrafts sold at shops help to promote the development of local handicrafts. Shops by the old street of Xingping are mainly handicraft shops and cafes.

2.5 Summary

Generally speaking, Yangshuo residents support the development of tourism and most people benefit from it. They also agree that tourism development has boosted local economy. However, despite the fact that residents are in favour of tourism, their degree of satisfaction declines, and more and more people perceive the unequal distribution of interest. Most residents agree that tourism development increases employment opportunities, investment and consumption as well as the living standard, but they also perceive the negative effects on economic development such as the increase of prices of commodities and houses. In addition, residents also perceive the side effects of tourism in the field of environment, such as air pollution, water pollution and traffic congestion, and their awareness of environment protection is also strengthened. In terms of social and cultural effects, there are both positive and negative ones. To attract more tourists, local governments pay more attention on festival activities, which has promoted traditional culture. Local handicrafts also develop to meet the need of tourists, which helps local residents to make a living. At the same time, tourism industry has brought negative effects on local society and culture. It limits residents' use of tourism resources s, increase crime rates, damages local morality and increases the tension between residents and tourists. However, the negative effects are not very serious as the proportion of residents who agree with those side effects is not high. Some residents are able to tell whether the positive or negative effects on infrastructures, medical facilities, demolition of houses are brought by tourism development or not. They think that without tourism, the infrastructures still can be improved and new houses will be built with social development, and tourism only acts as one of the impetuses. As in previous years, residents' decision-making channels and their access to tourism information has not been improved

greatly. The government needs to do more to adjust the interest distribution mechanism, improve the environment, and provide channels for residents to get information and give feedbacks.

Chapter III Tourist Satisfaction

3.1 Tourist Evaluation on Yangshuo Tourism Resources

The evaluation on satisfaction of Yangshuo tourists is done through questionnaire survey. To evaluate the tourist satisfaction, a series of indicators are used to measure tourist perception to products and services and the tourist behavior characteristics are analyzed.

3.1.1 Background and Methods

The monitoring started from July 5, 2013 and ended on July 13, 2013. The survey group randomly picked domestic and foreign tourists in the major scenic spots of Yangshuo, such as West Street, Yangshuo bus station, Yangshuo Park, Old County Village, adjacent area of Ten miles Gallery and Xingping Ancient Town, as the respondents. In the survey, a total of 1100 questionnaires were distributed, of which 714 out of 820 to domestic tourists are valid (valid percent: 87.1%) and 226 out of 280 to foreign tourists are valid (valid percent: 80.7%).

Such tourist behavior characteristics like travel mode, tourist motive and consumer preference are included in the questionnaire, which shows the tourist preference of the target market of Yangshuo, a mature tourism destination. In terms of consumer preference, a monitoring indicator of local-style folk houses has been added. The tourist satisfaction survey consists of three parts: Tourism resources evaluation, tourism service evaluation and tourism environment evaluation. The survey content of these three is divided into 32 secondary indicators and 5 satisfaction levels (strongly agree (5), agree (4), neutral (3), disagree (2) and strongly disagree (1)) through the five-point Likert scale. To measure the tourist satisfaction to Yangshuo tourism, it is necessary to calculate the average value of each indicator and the percentages of tourists choosing strongly agree and agree (5 and 4). The overall evaluation of tourists of Yangshuo tourism and their willingness to revisit and recommend the place are also required if we need to know the sustainability of Yangshuo tourism. In addition, the tourist complaints from Yangshuo County Tourism Bureau are used herein as an auxiliary indicator to measure the tourist satisfaction.

3.1.2 Tourist Satisfaction Monitoring Indicators

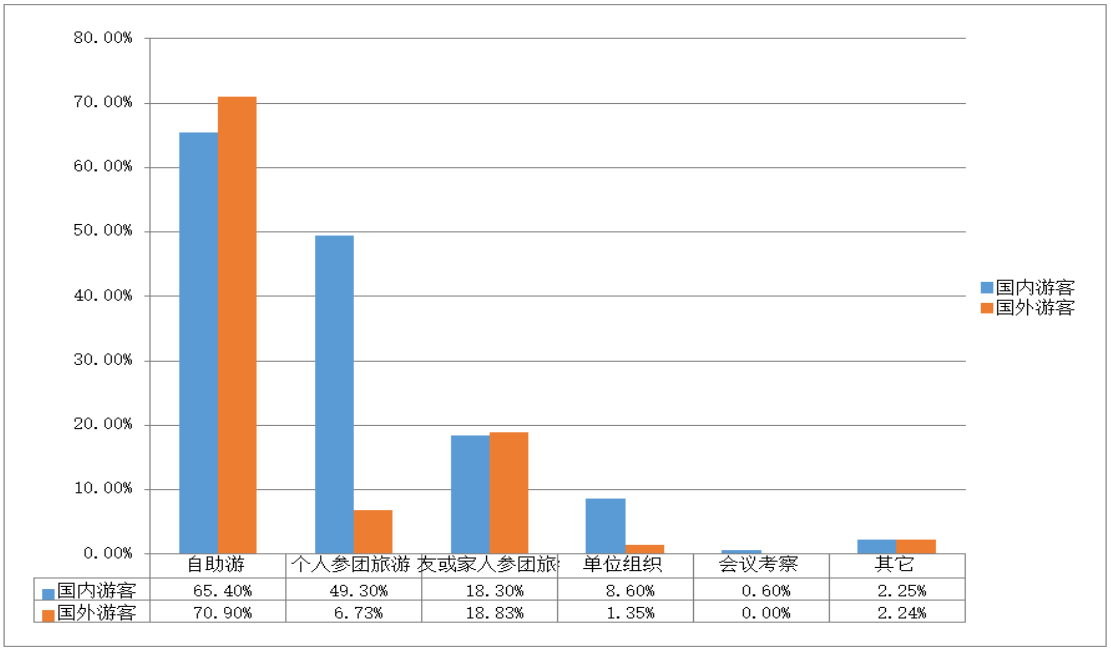
The questionnaire, with the application of a five-point scale, consists of 32 questions which are classified into three evaluation aspects and one overall evaluation. The evaluation on tourist resources includes 6 indicators, which are divided into two parts – resource features and resource conservation; the evaluation on tourism service includes 19 indicators. To better measure and monitor the quality of different products and services, these indicators are divided into five parts based on the product type - scenic spot service, food and beverage, accommodation, transportation and shopping. The 6 indicators included in the evaluation on overall environment reflect different degrees of perception to human environment and natural environment. In addition to the above three evaluations, an overall evaluation is also included in the questionnaire.

3.2 Tourist Behavior Characteristics

3.2.1 Travel Methods of Tourists: DIY Tour Plays a Dominate Role, and Domestic Tour Group Becomes Popular

It can be learnt from the results of figure 3-1 that DIY tour is popular in Yangshuo among tourists at home and abroad. More than60% of the domestic tourists and 70.9% of the foreign tourists choose DIY tour. Near half of the domestic tourists and 6.73% of foreign tourists choose to join a tour group on their own, showing a large-scale increase in domestic tourists while a decrease in foreign tourists comparing to previous years. 18.3% of the domestic tourists and 18.83% of the foreign tourists choose to join a tour group with their families and friends, and the percentages are almost the same as that of previous years (around 20%). 12.9% of the domestic tourists choosing to join in a tour organized by companies, though the number of tourists decreases comparing to the previous year. This indicates that Yangshuo begins to become a destination of the incentive tour given by companies. The percentage of foreign tourists joining in a tour organized by companies is close to that of previous years (1%-2%). The percentage of tourists visiting Yangshuo for conference and field observation is very low, accounting for 0.6% (domestic) and 0% (foreign) respectively. Although it is found from the report for the first half of 2012 that many five-star or five-star standard high-end hotels have been built, no obvious growth in the number of tourists joining a convention tour is shown due to the need

of business conference facilities for long-term preparation and development and the policy to restrict travel at public expenses this year.



	自助游	个人参团旅游	友或家人参团旅	单位组织	会议考察	其它
国内游客	65.40%	49.30%	18.30%	8.60%	0.60%	2.25%
国外游客	70.90%	6.73%	18.83%	1.35%	0.00%	2.24%

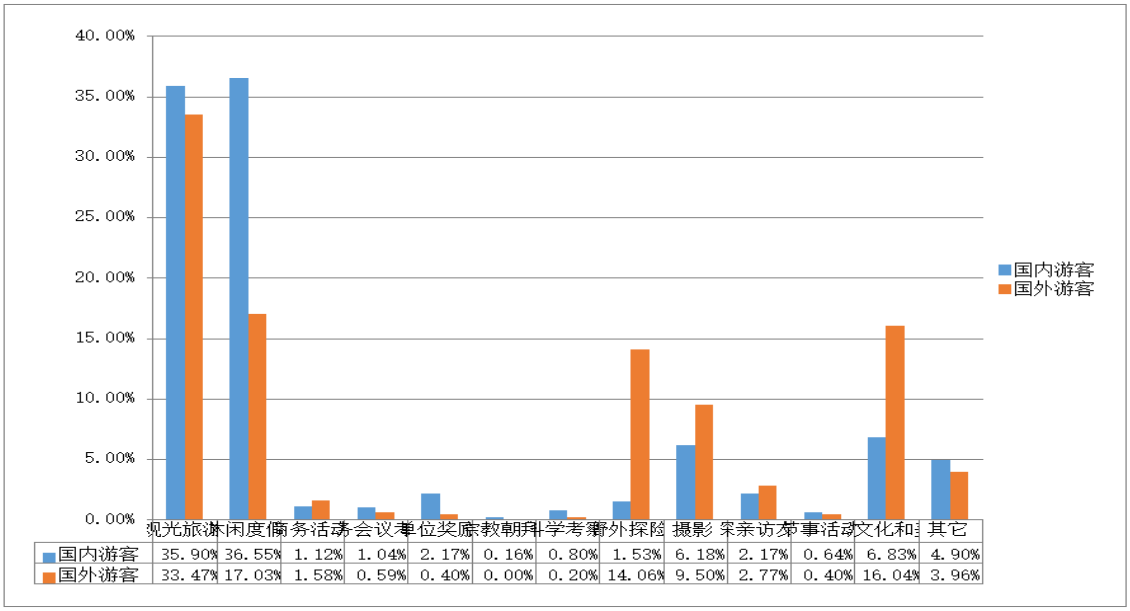
Figure 3-1 Comparison of travel methods between domestic and foreign tourists

3.2.2 Tourism Motivations are Mainly Sightseeing and Holidays, and New Motivations Include Adventures, Culture and Food

35.9% and 36.55% of the domestic tourists go to Yangshuo for sightseeing and on holidays. The percentage of tourists for learning culture and delicacies is 6.3%, which is lower than that of 2013 (21.3%). Except bad weather and other objective reasons, the homogeneity of food and no price standard of commodities are also reasons for the decrease. Compared with the data last year, the number of tourists goes to Yangshuo for photography and wild adventure decreases, while there was slight increase last year, accounting for 6.18% and 1.53% respectively. This indicates that tourists begin to travel for special motivations, but tourists are concerned about bad weathers this year.

But foreign tourists are slightly different. More than half the foreign tourists go for sightseeing (33.47%) and on holidays (17.03%), which accounts for the highest proportion of all tourism motivations. The most obvious difference between domestic and foreign tourists lies in the motivation of wild adventure. 14.06% of the foreign tourists go to Yangshuo for field exploration, rock climbing and other outdoor activities, while 1.53% domestic tourists go to Yangshuo for the motivation. 9.5%

of foreign tourists and 6.18% of domestic tourists go to Yangshuo for photography. Foreign and domestic tourists who go to Yangshuo for culture and food account for 16.04% and 6.83% respectively. In addition to sightseeing and holidays based on natural resources, Yangshuo can develop new resources for tourism development such as adventures, photography, culture and food.



	观光旅游	休闲度假	商务活动	会议考察	单位奖励	宗教朝拜	科学考察	探险	摄影	探亲访友	节事活动	文化和美食	其它
国内游客	35.90%	36.55%	1.12%	1.04%	2.17%	0.16%	0.80%	1.53%	6.18%	2.17%	0.64%	6.83%	4.90%
国外游客	33.47%	17.03%	1.58%	0.59%	0.40%	0.00%	0.20%	14.06%	9.50%	2.77%	0.40%	16.04%	3.96%

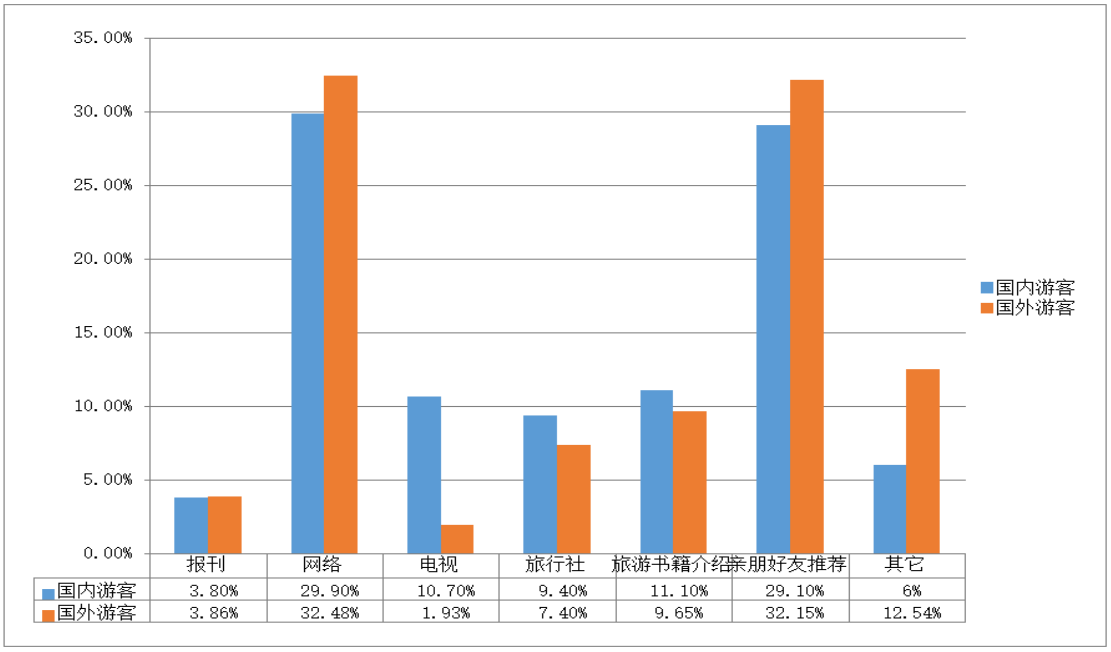
Figure 3-2 Comparison of tourism motivations between domestic and foreign tourists

3.2.3 Tourism Information Tend to be Reached Through Network Platform, and Recommendations from Friends and Relatives, thus Scenic Spot Introduction Attracts Much Attention

As shown in Figure 3-3, domestic and foreign tourists get travel information mainly from the network platform and recommendation from friends and relatives. 29.9% of domestic tourists get information from internet and 29.1% through recommendations. As for foreign tourists, 32.48% of them get information via internet and 32.15% from recommendations. Whether through internet platform or by recommendations from friends and relatives, the data shows that the reputation of Yangshuo is essential for tourism development.

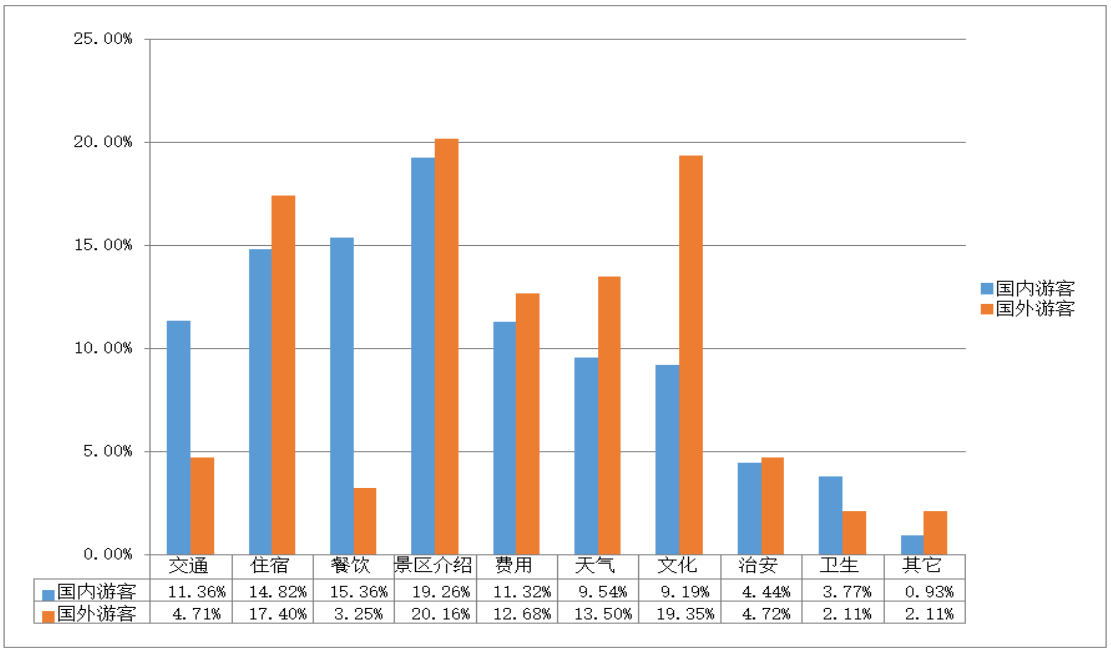
As shown in Figure 3-4, the information tourists home and abroad want to get most is the introduction of scenic spots, accounting for 19.26% and 20.16% respectively. Domestic tourists also want to get the information of catering, accommodation and transportation, accounting for 15.36%,

14.82% and 11.36 respectively. In terms of foreign tourists, they want to obtain more information on culture, accommodation and weather, accounting for 19.35%, 17.4% and 13.5% respectively.



	报刊	网络	电视	旅行社	旅游书籍介绍	亲朋好友推荐	其它
国内游客	3.80%	29.90%	10.70%	9.40%	11.10%	29.10%	6%
国外游客	3.86%	32.48%	1.93%	7.40%	9.65%	32.15%	12.54%

Figure 3-3 Comparison of tourism information channels between domestic and foreign tourists



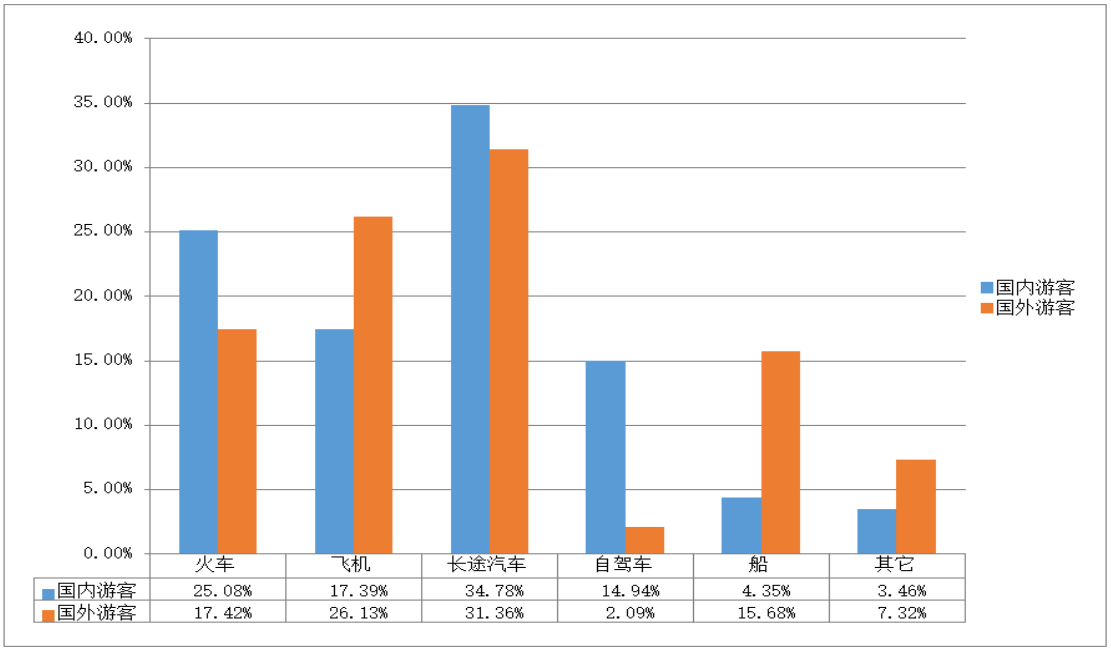
	交通	住宿	餐饮	景区介绍	费用	天气	文化	治安	卫生	其它
国内游客	11.36%	14.82%	15.36%	19.26%	11.32%	9.54%	9.19%	4.44%	3.77%	0.93%
国外游客	4.71%	17.40%	3.25%	20.16%	12.68%	13.50%	19.35%	4.72%	2.11%	2.11%

Figure 3-4 Comparison of the most needed information between domestic and foreign tourists

3.2.4 Diverse Options in Means of Transportation and Travel

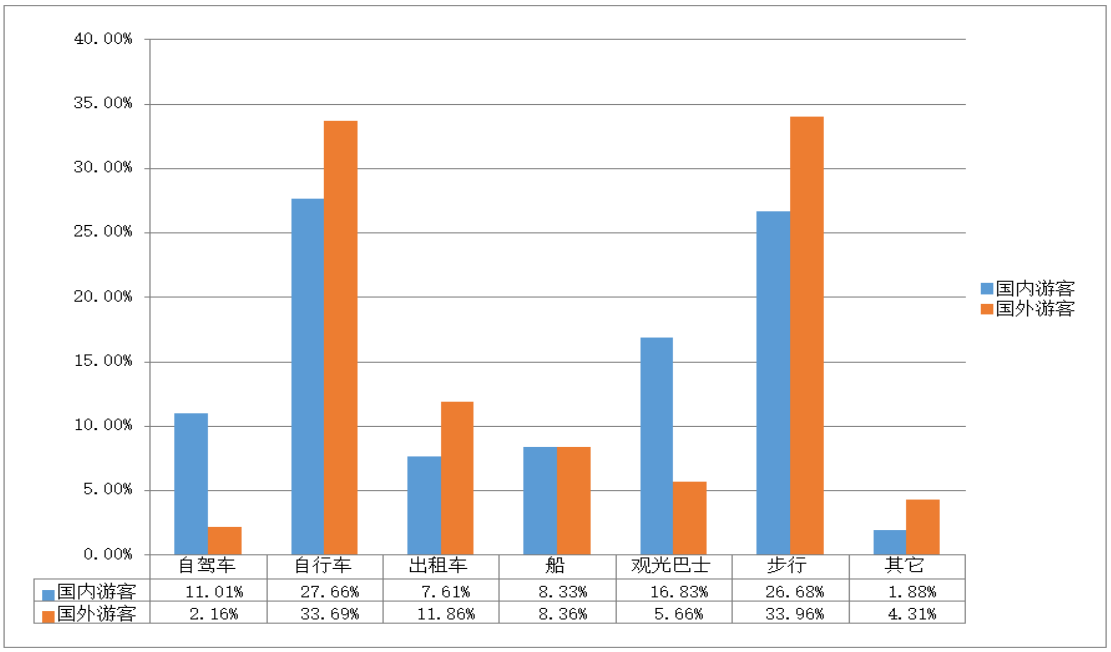
As shown in figure 3-5, most of tourists, at home and abroad, go to Yangshuo by long-distance buses, because many will visit Guilin before Yangshuo. The percentage of domestic tourists who go

to Yangshuo by plane or go on a self-driving tour increases comparing to that of last year. Regarding the means of transport in Yangshuo, as shown in figure 3-6, just like previous years, tourists home and abroad prefer to travel by bike or on foot, which is environmental-friendly. Through the comparison of the data, it can be found that foreign tourists still pay more attention to the communion with nature, and more than half of them travel by bike or on foot. Although some domestic tourists start to travel in an environmental-friendly way, tourists who travel with tour groups are still dependent on sightseeing buses.



	火车	飞机	长途汽车	自驾车	船	其它
国内游客	25.08%	17.39%	34.78%	14.94%	4.35%	3.46%
国外游客	17.42%	26.13%	31.36%	2.09%	15.68%	7.32%

Figure 3-5 Comparison of means of transport between domestic and foreign tourists to Yangshuo



	自驾车	自行车	出租车	船	观光巴士	步行	其它
国内游客	11.01%	27.66%	7.61%	8.33%	16.83%	26.68%	1.88%
国外游客	2.16%	33.69%	11.86%	8.36%	5.66%	33.96%	4.31%

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

3.2.5 Accommodation Facilities: Guesthouses and Youth Hostels are Preference and High-end and Express Homestay are in Need

As shown in figure 3-7, most of the domestic tourists (39.45%) choose guesthouses, followed by star hotels (27.31%). 23.55% choose youth hostels, which indicates that youth hostels have attracted more and more attentions from tourists at home. Different from the domestic tourists, most of the foreign tourists (34.51%) choose youth hostels. According to the survey, the youth hostels in West Street and its adjacent alleys are popular among foreign tourists. The percentage of foreign tourists choosing to live in star hotels (22.12%) is similar to that of previous years, while foreign tourists choosing to live in guesthouses have seen a large increase, accounting for 30.09%. In the option of others, inns are the main choice among tourists. Thus, the development of homestay market in Yangshuo is basically stable, and there is still room for growth. As shown in Figure 3-8, up to 94.37% of domestic tourists in Yangshuo support the development of special homestay. Among them, 51.64% of domestic tourists think that the price of homestay is not so important as the features of homestay, while 42.73% of domestic tourists think low price is the key factor. According to the two different

evaluations, the development of Yangshuo homestay market may present dualization, one is high-end boutique hotel style and the other is express hotel style.

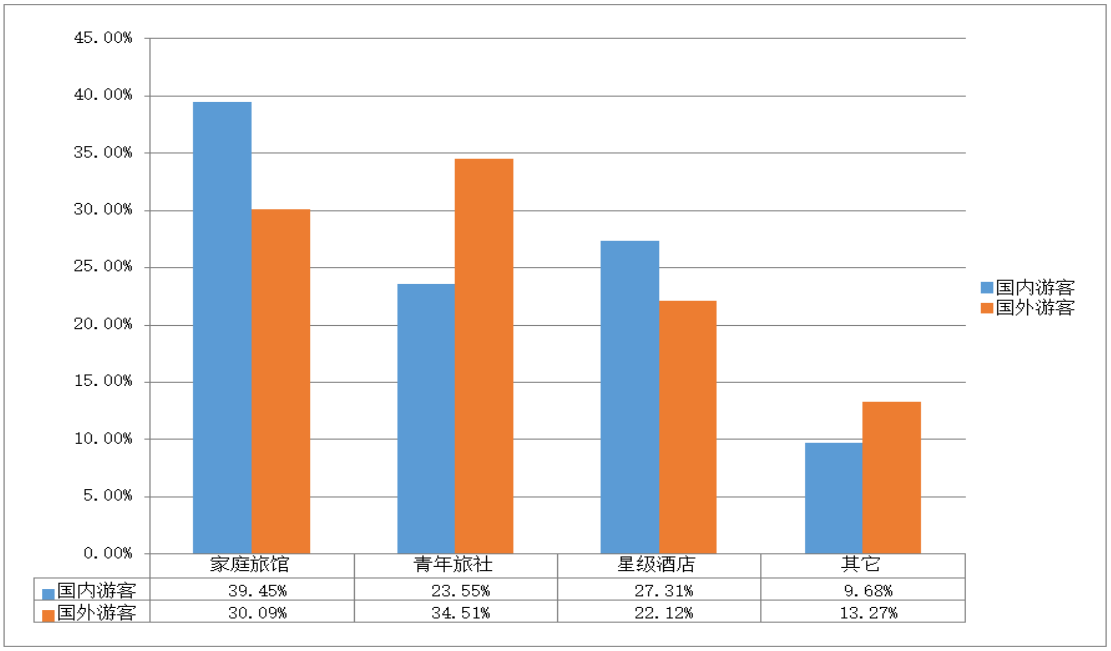


Figure 3-7 Comparison of accommodation facilities between domestic and foreign tourists

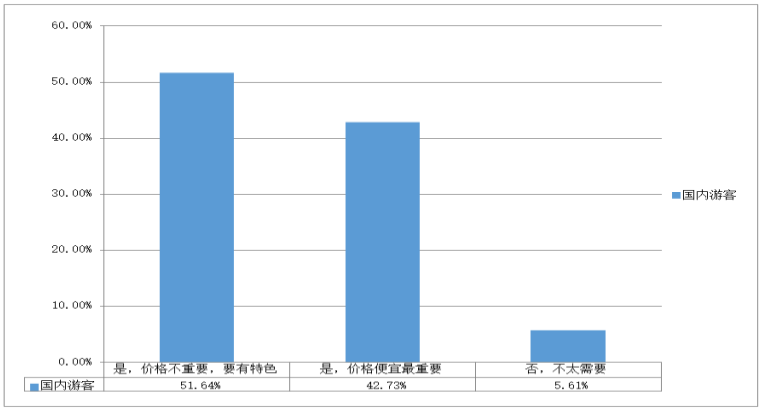


Figure 3-8 Evaluation of new special homestay among domestic tourists

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

72.68% of the domestic tourists and 60% of the foreign tourists stay in Yangshuo for 1 to 3 days. Foreign tourists tend to stay there for a longer time. 25.78% of them stay there for 4 to 7 days, a

percentage of which is higher than that of the domestic tourists (20.74%). The percentage of foreign tourists staying in Yangshuo for over 7 days is 14.22%, much higher than that of the domestic tourists, which only accounts for 6.58%. Overall, the data is similar to that of previous years.

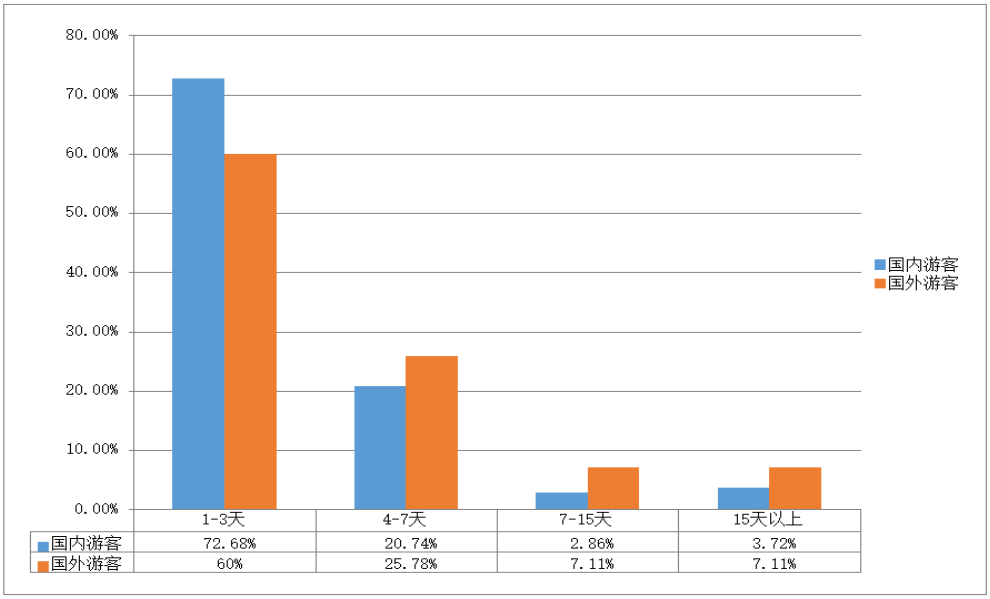


Figure 3-9 Comparison of the length of stay between domestic and foreign tourists

3.2.7 Total Tourism Spending: The Total Spending is Low but the Domestic Tourists' Spending Increases.

The tourism spending (total spending) of domestic and foreign tourists is low. In most cases, the spending is lower than 500 Yuan (19% for domestic tourists and 23.85% for foreign tourists) and between 500 and 1000 Yuan (31.06% for domestic tourists and 33.44% for foreign tourists). This is due to the short length of stay and sightseeing tour of most tourists. Compared with previous years, the tourism spending of domestic tourists increases slightly, and the percentage of domestic tourists who spend over 1000 Yuan is higher than that of foreign tourists. The tourism spending of foreign tourists is similar to that of previous years.

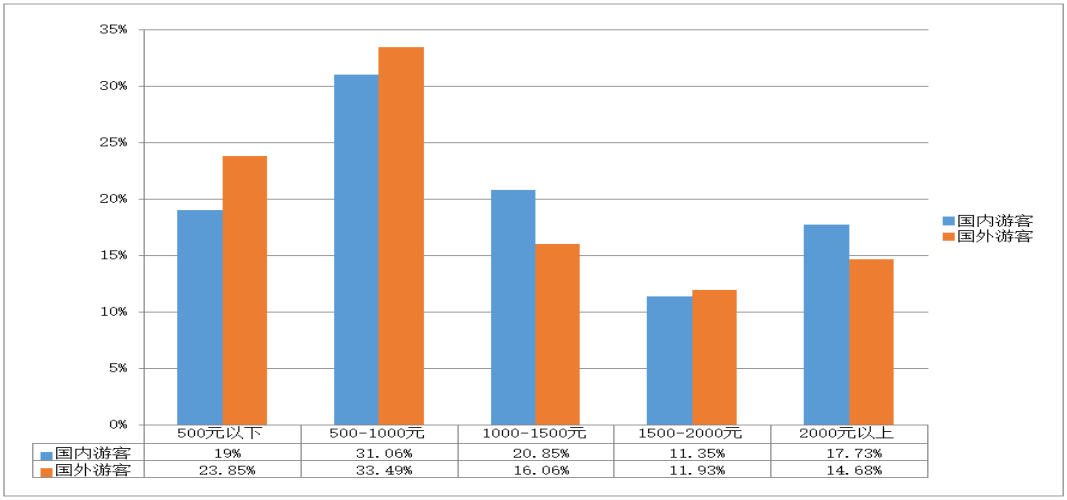


Figure 3-10 Comparison of total tourism spending between domestic and foreign tourists

3.3 Tourist Satisfaction

3.3.1 The Evaluation on Tourism Resources is High

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

Table 3-1 Domestic tourist evaluation on tourism resources

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Evaluation on tourism resources	Resource features	Abundant natural resources and picturesque landscape	4.48	0.404	92.58%
		Locally featured cultural landscape	4.04	0.73	76.30%

		A good experience of the local food culture	3.69	0.85	60.49%
		The most beautiful scenery in China	4.19	0.701	79.51%
		Getting satisfied souvenirs and crafts	3.65	0.976	56.15%
	Resource conservation	Good water quality of Lijiang River	3.5186	1.091	49.93%
		Well-preserved cultural landscape	3.7471	0.838	61.42%

Table 3-2 Foreign tourist evaluation on tourism resources

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Evaluation on tourism resources	Resource features	Abundant natural resources and picturesque landscape	4.69	0.258	97.80%
		Locally featured cultural landscape	3.84	1.338	77.31%
		A good experience of the local food culture	4.3	4.746	73.46%
		The most beautiful scenery in China	3.58	1.106	55.86%
	Resource conservation	Getting satisfied souvenirs and crafts	3.93	0.686	74.21%
		Good water quality of Lijiang River	2.96	1.208	27.60%
		Good water quality	2.89	1.786	36.95%

		of Yulong River			
		Well-preserved cultural landscape	3.49	1.051	50.68%

According to the questionnaire for domestic and foreign tourists in 2014, 92.58% of the domestic tourists and 97.80% of the foreign tourists are satisfied with the abundant natural resources and picturesque landscape in Yangshuo. But the proportion of satisfaction to locally featured cultural landscape is lower, of which the domestic tourists account for 76.30% and the foreign tourists account for 77.31%. The proportion of tourist satisfaction to souvenirs is not high, of which the domestic tourists account for 56.15% and the foreign tourists account for 74.21%. According to the field survey and interview, the souvenirs and crafts in Yangshuo are very similar to those in Xiamen, Fenghuang and other tourist destinations. Tourist souvenir homogenization is a phenomenon commonly existed in China. Regarding the local food culture, the satisfaction proportion of domestic tourists is 60.49%, while the satisfaction proportion of foreign tourists is 73.46%. In other words, the local food satisfies more foreign tourists than domestic tourists. The food culture of Yangshuo is relatively monotonous and the once specials have become quite common in Yangshuo. The Chinese high requirement for food, the less obvious uniqueness of the local food culture, and the difference between foreign food culture and Chinese food culture lead to the higher satisfaction of foreign tourists with local food than domestic tourists.

Regarding resource conservation, foreign tourists think that the water quality of Lijiang River is better than that of Yulong River. However, the field survey shows that the water quality of Yulong River is better. According to the interviews, many domestic tourists who choose to go to Lijiang River have been to Yulong River. The proportion of tourist satisfaction to water quality of Lijiang River is low, of which the domestic tourists account for 49.93%, higher than the 27.60% of the foreign tourists. As for cultural landscape preservation, both tourists at home and abroad don’t think the cultural landscape is well-preserved and only 61.42 of the domestic tourists and 50.68% of the foreign tourists are satisfied. Generally speaking, neither domestic tourists nor foreign tourist are satisfied with the local tourist resources. The protection of tourist resources including natural and cultural resources fails to get recognition from domestic or foreign tourists.

3.3.2 Evaluation on Tourism Services of Yangshuo

3.3.2.1 Low Satisfaction with Scenic Spot Service

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

Table 3-3 Domestic tourist evaluation on scenic spot service

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Scenic spot service	Reasonable ticket pricing for scenic spots	3.1362	1.2	37.90%
		Good service quality of scenic staff	3.5106	0.969	52.16%
		Clear tour description	3.427	1.055	47.32%

Table 3-4 Foreign tourist evaluation on scenic spot service

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Scenic spot service	Reasonable ticket pricing for scenic spots	3.37	1.306	50.45%
		Good service quality of scenic staff	3.5242	1.419	60.65%
		Clear tour description	3.3789	5.82	51.90%

According to the evaluation of domestic and foreign tourists on scenic spot service, the satisfaction is not high. However, the satisfaction of foreign tourists is slightly higher than that of domestic tourists. As for ticket pricing, the satisfaction proportions of domestic tourists and foreign tourists are 37.90% and 50.45% respectively. The low satisfaction in this regard is relevant to Yangshuo's opaque pricing of tourism. As for the service quality of scenic staff, the satisfaction of

foreign tourists is higher than that of domestic tourists. It is found in the field survey that the scenic staff prefers to serve the foreign tourists because they pay more for products. As for tour description, the satisfaction of both domestic and foreign tourist is not high, accounting for 47.32% and 51.90% respectively.

3.3.2.2. Low Satisfaction with Local Food and Beverage Service

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

Table 3-5 Domestic tourist evaluation on food and beverage service

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Food and beverage service	Food specialties	3.5716	2.188	52.65%
		Food hygiene and safety	3.3418	0.947	43.45%
		Reasonable price	3.2043	1.083	38.94%

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

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Food and beverage service	Food specialties	3.5639	1.043	57.27%
		Food hygiene and safety	3.4802	1.215	57.73%
		Reasonable price	3.7048	1.156	66.52%

According to the above two tables, less than 50% of the domestic tourists are satisfied with the local food and beverage service, the percentage of which is lower than that of foreign tourists. One reason is that average foreign tourists are not very sensitive to food price since they have stronger

purchasing power, and the other reason is that Chinese food seems more attractive to foreign tourists. Generally speaking, the satisfaction of tourists at home and abroad is not high. It is found from the interviews that Yangshuo fails to satisfy tourists in food specialties, hygiene and safety and price. The homogeneity of food and opaque pricing bring the tourists a negative feeling on the local diet.

3.3.2.3 Basic Satisfaction with Local Accommodation Service

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

Table 3-7 Domestic tourist evaluation on accommodation service

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Accommodation service	Accommodation hygiene and safety	3.6553	0.914	61.94%
		Reasonable price	3.6355	0.956	61.01%
		Good quality of room-and-board staff service	3.5887	1.001	59.97%

Table 3-8 Foreign tourist evaluation on accommodation service

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Accommodation service	Accommodation hygiene and safety	3.9604	1.047	77.83%
		Reasonable price	4.0705	4.818	77.38%
		Good quality of room-and-board staff service	3.9868	0.978	75.78%

According to the above two tables, the average of foreign tourist satisfaction with accommodation service is about 4. It shows that most of the foreign tourists are satisfied with the local accommodation. The average of domestic tourists is 3.6, and many of them remain neutral to accommodation. It shows that the satisfaction proportion of foreign tourists is apparently higher than that of domestic tourists. According to the interviews, the reason of this is that the domestic tourists have higher requirement for accommodation than foreign tourists and the accommodation facilities chosen by foreign tourists are generally better than those by domestic tourists.

3.3.2.4 Different Evaluations on and Low Satisfaction with Transportation Service

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

Table 3-9 Domestic tourist evaluation on transportation service

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Transportation service	Convenient traffic	3.3078	1.108	45.53%
		Clear traffic signage	3.4028	1.056	47.34%
		Reasonable price	3.5333	0.974	54.09%

Table 3-10 Foreign tourist evaluation on transportation service

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Transportation service	Convenient traffic	2.9692	1.411	37.22%
		Clear traffic signage	2.8767	1.374	31.36%

		Reasonable price	3.0837	1.794	47.12%

According to the above two tables, the average of domestic and foreign tourists' satisfaction with transportation is 3.4 and 2.9 respectively, foreign tourists showing lower satisfaction. It can be seen from the variances that a big gap exists in the transportation service evaluation between domestic and foreign tourists, for the traffic convenience varies with the means of transport and travel methods. According to the interviews, the public transport in Yangshuo is not convenient and the public transit system is not complete. Many places need to be reached by bike or bus. Different from those in a package tour who can go everywhere by tourist bus, the DIY tourists will have a deeper experience of traffic inconvenience. Communication is the main reason that leads to the fluctuation of foreign tourist satisfaction. It is found upon our observation in Yangshuo station that foreign tourists are not clear about the bus schedule. Sometimes, they need some advices for fear of missing the bus. It would be better if they are with a Chinese tour guide. These factors can also explain why the satisfaction with transportation service fluctuates greatly.

3.3.2.5 Low Evaluation on Shopping and Entertainment

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

Table 3-11 Domestic tourist evaluation on shopping and entertainment

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Shopping and entertainment	Diversity of recreational activities	3.804	0.764	66.95%
		Good service quality of employees at small shops around	3.4424	0.905	47.12%
		Tourism product homogenization	3.835	3.403	65.80%

		Fake and shoddy tourism products	3.3514	2.191	37.37%
		Reasonable prices for tourism commodities	3.186	3.226	33.82%

Table 3-12 Foreign tourist evaluation on shopping and entertainment

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism service evaluation	Shopping and entertainment	Diversity of recreational activities	3.7048	1.749	74.76%
		Good service quality of employees at small shops around	3.5242	8.436	56.19%
		Tourism product homogenization	3.7841	12.028	58.69%
		Fake and shoddy tourism products	3.5463	5.435	54.50%
		Reasonable prices for tourism commodities	3.2643	1.337	47.71%

It can be seen from the above two tables that most domestic and foreign tourists consider that the recreational activities are rich, and their satisfaction proportion with shopping and entertainment is 66.95% and 74.76% respectively. According to the interviews, foreign tourists love going to bars and Yangshuo, a place with different types of bars, meets their needs. In addition, the West Street in Yangshuo is full of commercial atmosphere, attracting many domestic tourists who look for entertainment at night. As for the service quality of employees at small shops around, the satisfaction proportion of domestic and foreign tourists is 47.12% and 56.19% respectively. According to

observation, foreign tourists are friendly when doing shopping and have stronger purchasing power. As a result, employees are more willing to communicate with foreign tourists. However, domestic tourists show weak purchasing desire and browse around the shops most of the time. As a result, employers at the shop receive the domestic tourists with not that much passion. Regarding tourism product homogenization, both domestic and foreign tourists show high proportion of agreement, recording 65.80% and 58.69% respectively. Such situation is closely related to the fact that Yangshuo has similar tourism products with other scenic spots of the same sort. In fact, tourism product homogenization is a problem confronted by many scenic spots. At West Street, products with no local features and sold in the whole country can be easily found, such as hammer pie, chillily sauce and Mango. 37.37% domestic tourists and 54.56% foreign tourists agree that there are fake and shoddy tourism products, the major cause of which is the wide range of goods and their uneven quality due to poor regulation. Although domestic tourists have been quite used to such cases, foreign tourists who have higher demands for product quality show lower satisfaction. As the prices offered by the vendors in the tourism area are not transparent and change with types of tourists, both domestic and foreign tourists are dissatisfied with the tourism product price and the satisfaction proportion in this regard only accounts for 33.82% and 47.71% respectively.

3.3.3 Evaluation on Tourism Environment of Yangshuo

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

3.3.3.1 The Evaluation on Human Environment of Yangshuo is High

Table 3-13 Domestic tourist evaluation on human environment

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism environment	Human environment	Efficient handling of complaints	3.2014	3.265	20.31%

evaluation		Local resident-friendliness	3.8659	0.948	72.40%
		Community in good public order	3.6619	0.861	60.26%
		Over-commercialized in the locality	3.8787	0.895	67.10%

Table 3-14 Foreign tourist evaluation on human environment

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism environment evaluation	Human environment	Efficient handling of complaints	2.8458	1.848	34.01%
		Local resident-friendliness	4.0485	1.055	77.58%
		Community in good public order	3.6593	1.043	63.23%
		Over-commercialized in the locality	3.7389	1.029	62.95%

According to the above two tables, in terms of efficient handling of complaints, many tourists have low satisfaction, with the satisfaction proportion recording only 20.13% and 34.01% respectively. According to the interviews, as the proportion of tourism complaints of Yangshuo is low, tourists who have no complaint about Yangshuo tend to remain neutral. That's why the satisfaction with the efficient handling of complaints is so low, with the average of 3. The average evaluation on local resident-friendliness and community in good public order is around 3.7, and the corresponding proportion of satisfaction is 60% to 70%, showing that tourists have high valuation on local human environment. However, 60% of both domestic and foreign tourists agree that the locality is over commercialized, which affects the local human environment to a certain extent.

3.3.3.2 The Evaluation on Natural Environment of Yangshuo is Broadly Positive

The natural environment includes three indicators: clean scenic environment, clean air and low noise.

Table 3-15 Domestic tourist evaluation on natural environment

Monitoring aspect (internal)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism environment evaluation	Natural environment	Clean scenic environment	3.7603	0.877	67.05%
		Clean air	4.1284	0.695	82.83%
		Low noise	3.4593	1.172	51.51%

Table 3-16 Foreign tourist evaluation on natural environment

Monitoring aspect (external)		Monitoring indicator	Average	Variance	Satisfaction proportion
Tourism environment evaluation	Natural environment	Clean scenic environment	3.511	1.154	57.08%
		Clean air	3.9163	0.882	77.43%
		Low noise	3.0264	1.486	40.00%

According to the above two tables, the evaluation of domestic and foreign tourists on scenic environment and air is broadly positive. But both domestic and foreign tourists think the noise is high in Yangshuo and the difference in satisfaction is large. According to the interviews, it is found that such difference is closely related to the location of the hotel that the tourists choose and its surroundings. For example, some tourists choose to live by the road near Ten miles Gallery and some choose to live by the mountains. That's the reason leading to large fluctuation of satisfaction.

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

Yangshuo receives a high overall evaluation from tourists at home and abroad. As the overall evaluation indicators in table 3-17 shows, the proportion of satisfaction of foreign tourists (86.45%) is higher than that of the domestic tourists (73.39%). Similar result can be found by measuring the tourist expectation of Yangshuo: the proportion of satisfaction of foreign tourists is 96.44% while the proportion of satisfaction of domestic tourists is 74.35%. As shown in figure 3-11, 26% of the domestic tourists think that their tour in Yangshuo is below expectation, while only 3% of the foreign tourists think so. It can be seen from the above that the overall evaluation on Yangshuo is high. In other words, most of tourists are satisfied with tour in Yangshuo.

Table 3-17 Comparison of overall evaluation between domestic and foreign tourists

Monitoring aspect	Monitoring indicator	Average	Variance	Satisfaction proportion
Overall evaluation	Overall satisfaction of domestic tourists	3.843	0.492	73.39%
	Overall satisfaction of foreign tourists	4.0794	0.421	86.45%

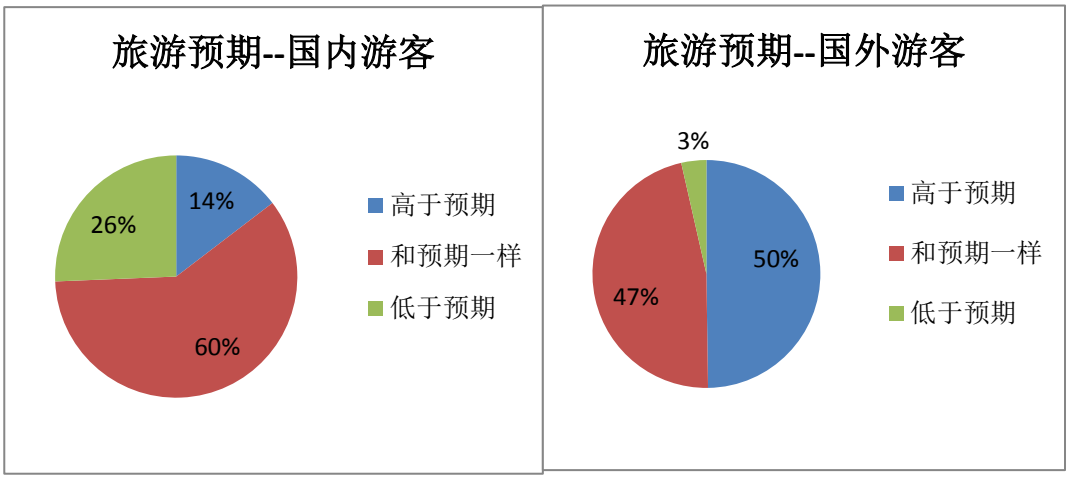


Figure 3-11 Expectation of domestic and foreign tourists

3.3.5 The Willingness to Make Recommendation is Higher than the Willingness to Revisit

As shown in figure 3-12, half of tourists are willing to revisit Yangshuo. This is relevant to the tourist satisfaction. The higher the satisfaction is, the higher the willingness to revisit is. Tourist source is an influencing factor. According to the survey, most of tourists to Yangshuo are from Guangxi and Guangdong because it takes a shorter time for them to get there. For foreign tourists, the recreational activities in Yangshuo meet their needs, so many of them are willing to revisit Yangshuo.

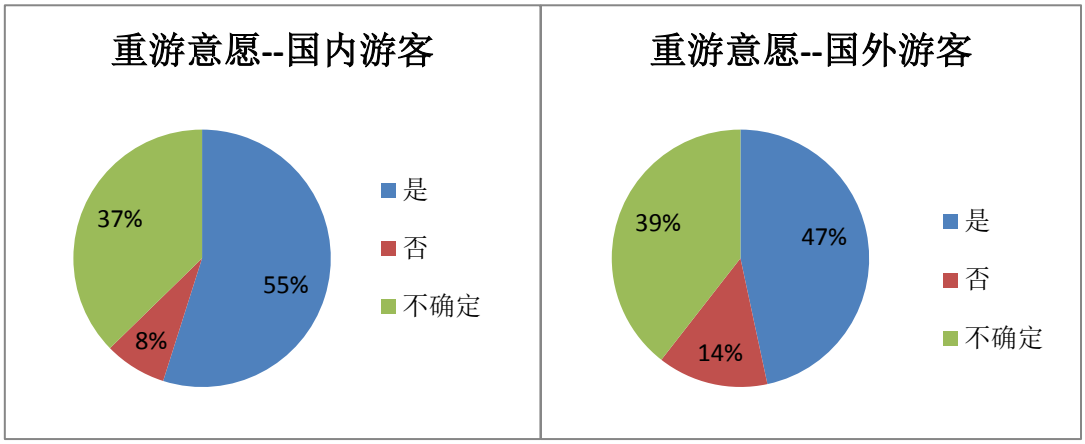


Figure 3-12 Willingness of domestic and foreign tourists to revisit

As shown in figure 3-13, 75% of the domestic tourists are willing to recommend Yangshuo to their relatives and friends and 94% of the foreign tourists are willing to do so. Although the proportions of both are high, more foreign tourists than domestic ones are willing to do so. This is relevant to the tourist expectation. According to figure 3-11, only 14% of the domestic tourists think Yangshuo is beyond their expectations, while the proportion of foreign tourists in this regard reaches 50%. Those who think Yangshuo is beyond their expectations tend to recommend it to their relatives and friends. That's why more foreign tourists are willing to make recommendation.

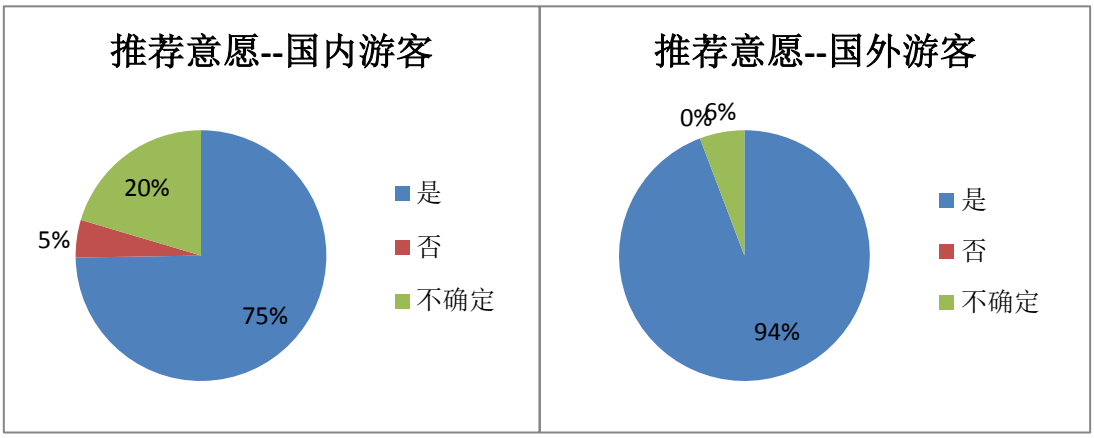


Figure 3-13 Willingness of domestic and foreign tourists to recommend

3.4 Handling of Tourists Complaints

According to the telephone record of the first half of 2014, 92 complaints, reports and helping calls were received from tourists and well handled, saving 74226 Yuan of economic loss for tourists. The service complaints as shown in table 3-18 involve bamboo rafting and scenic spot service. Most complaints are about bamboo rafting (46.7%) and scenic spot service (24.4%), while complaints about travel agency service (11.1%), tour guide service (6.7%), hotel service (4.4%) and public service (3.3%) are less.

The complaints about bamboo rafting include not standardized service and charge (25), property loss (10), forced consumption (3), wounding and threatening (3) and poor service attitude (1). The complaints about scenic spot service include defrauding the tourists (11), wounding and threatening (4), forced consumption (2), ticket selling and refund (2), poor service attitude (2) and unreasonable requirements of tourists (1). The complaints about travel agency service include ticket reserving and refund (5), not standardized service and charge (3), wounding (2). The complaints about tour guide service include not standardized service and charge (4), wounding (1) and defrauding the tourists (1). The complaints about public service include poor service attitude of bus drivers (1), not standardized bus routes (1), ill-equipped boats (1) and tandem bicycle shopkeepers report losses and claim for compensation (1). The complaints about hotel service include not standardized service and charge (2) and refusal to offer invoices (1).

Compared with the same period of 2013 (36 complaints), the number of complaints in the first half of 2014 recovers. In spite of that, the 2014 data show that both domestic and foreign tourists are more willing to make recommendation and revisit Yangshuo, recording around 1% to 5% increase.

Table 3-18 Record of complaint calls provided by Yangshuo County Tourism Quality Supervision and Management Office in the first half of 2014

Subject of complaint	Quantity	Percentage
Rafting	42	46.7%
Hotel service	3	3.3%
Scenic spot service	22	24.4%
Travel agency service	10	11.1%
Tour guide service	6	6.7%
Public service	4	4.4

3.5 Summary of the Chapter

In the survey, the tourist behavior and satisfaction of Yangshuo are monitored by means of questionnaires distribution, field observation and interview. It is found from the survey that most tourists going to Yangshuo prefer self-help travel, and they stay at Yangshuo for a short time without much spending. Their access to the travel information is mainly based on the mouth-of-word effect. Most of the domestic and foreign tourists go to Yangshuo mainly for sightseeing and recreation. Among the foreign tourists, there are two groups of people who enjoy wild adventure and learn local culture and food, becoming emerging groups worthy of attention.

3.5.1 The Proportion of DIY Tourists is High, Staying Time is Short and Total Consumption Needs Further Improvement

As DIY tour dominates the role in Yangshuo (domestic tourists accounting for 65.4% and foreign tourists 70.9%) and some new ways to travel emerge, the domestic tourists have begun to detach themselves from mass tourism and seek other special tourism motivations, such as learning

culture, enjoying food, taking photos and even going on wild adventures. The wild adventure, which is popular among foreign tourists, doesn't prevail in China. This is relevant to the Chinese preference and traditional cultural ideology. Most tourists stay at Yangshuo for a short time, with 72.68% domestic tourists and 60% foreign tourists stay at Yangshuo for only one to three days, which limits the tourists' expense at Yangshuo. Both domestic and foreign tourists have low spending, most of whom fall into the range of less than 100 Yuan (domestic tourists accounting for 19% and foreign tourists 23.85%) and 500 to 1000 Yuan (domestic tourists accounting for 31.06% and foreign tourists 33.44%). Moreover, as the domestic tourists pay more attention to the culture of the destination, they concern more about the quality of traveling experience and cost performance. As a result, Yangshuo shall improve the service quality of tourism products, ensure the product uniqueness, and, through combined marketing, make the tourists feel better as well as lengthening their duration of stay.

3.5.2 Spot Introduction should be Improved, Publicity Should Rely More on Word-of-Mouth Reputation

For most domestic and foreign tourists, the approach to get tourist information is through word-of-mouth reputation. On line platforms and recommendation of friends and family are the two main approaches. 29.9% tourist information the domestic tourists receive are from websites, 29.1% from friends and families. 32.48% tourist information the foreign tourists receive are from websites, 32.15% from friends and families. It can be seen that whether it is via online platforms or friends and families, the word-of-mouth effect plays a critical role. The monitoring data show that domestic and foreign tourists want to get information about scenic spot introduction, accounting for 19.26% and 20.16% respectively. Therefore, publicity of tourist information on network platforms should pay more attention to scenic spot introduction and explanation of supporting information.

3.5.3 Tourist Resources, Natural and Human Environment Generally Receive High Evaluation

In terms of the abundant tourist resources and picturesque landscape, both domestic and foreign tourists have high degree of satisfaction, as high as 92.58% and 97.80% respectively. In terms of locally featured resources, the degrees of satisfaction of domestic and foreign tourists reach 76.30%

and 77.31% respectively. It can be seen that both domestic and foreign tourists have high degree of satisfaction with the tourist resources in Yangshuo. According to the monitoring result of tourists' evaluation on the human resources, the three monitoring indicators, including local resident-friendliness, community in good public order and over-commercialized in the locality, all reach around 3.7 regarding the average and enjoy 60%-70% of tourist satisfaction rate, showing that tourists generally have high evaluation on human resources. According to the monitoring result of tourists' evaluation on natural resources, both domestic and foreign tourists affirm the environment of the scenic spot and air quality in Yangshuo. However, both domestic and foreign tourists think that Yangshuo has big noise and the satisfaction rates in this regard vary a lot. Therefore, future development of Yangshuo should pay more attention to noise control.

3.5.4 Accommodation and Entertainment Service are Basically Satisfactory, While Service Regarding Scenic Spot, Food and Public Transportation Still Needs Improvement

Both domestic and foreign tourists are basically satisfied with the accommodation and entertainment service in Yangshuo**.** According to the monitoring result of tourists' evaluation on accommodation service, the average of foreign tourists is around 4 and most of them are satisfied with the accommodation there; while the average of domestic tourists is around 3.6 and most of them present a neutral attitude towards the accommodation there. In terms of shopping and entertainment, both domestic and foreign tourists agree that the recreational activities are varied and interesting, the satisfaction rates of whom reach 66.95% and 74.76% respectively. According to the interviews, foreign tourists show great interest in bars, and the various bars in Yangshuo have met their needs in this regard.

According to the monitoring result of tourists' evaluation on scenic spot service, neither domestic nor foreign tourists have high satisfaction rate. As for price, the satisfaction rates of domestic and foreign tourists are 37.9% and 50.45% respectively. Domestic and foreign tourists' dissatisfaction with the price offered is related to the non-transparency of the overall prices in Yangshuo. In terms of staff service, foreign tourists have higher degree of satisfaction rate that domestic tourists. According to field survey, scenic spot staff are more willing to serve foreign

tourists mainly because foreign tourists are willing to pay more to tourist products. In terms of tour guide service, domestic tourists have similar satisfaction rate with foreign tourists and both present low satisfaction rate. According to the monitoring result of food service, domestic tourists have a satisfaction rate lower than 50%, lower than that of foreign tourists in general. However, both domestic and foreign tourists are dissatisfied with food service. According to interviews with tourists, Yangshuo still needs to do more to satisfy tourists in terms of food features, sanitary safety and price. Homogenization of food and opaque pricing arouse tourists' resentment at good in Yangshuo. In addition, domestic and foreign tourists have different evaluation on transportation service, mainly because different choices of transportation and tourist modes greatly affects transport convenience. According to interviews, the public transport in Yangshuo is not convenient and the public transit system is not complete. Many places need to be reached by bike or bus. Different from those in a package tour who can go everywhere by tourist bus, the DIY tourists will have a deeper experience of traffic inconvenience. Communication is the main reason that leads to the fluctuation of foreign tourist satisfaction with transport service, including lack of traffic signs in English and tour guides who can speak in English.

3.5.5 Domestic and Foreign Tourists Have Different Experience, Most Tourists Have Experience in Line with or above Expectation.

14% domestic tourists think that their experience is above expectation, while the proportion of foreign tourists in this regard 50%. 60% domestic tourists think that their experience is in line with their expectation, and the proportion of foreign tourists in this regard is 47%, showing that most tourists are satisfied with the tourism experience. At the same time, it is found that the satisfaction rate of foreign tourists is nearly 20% higher than that of domestic tourists, which may have something to do with the different activities chosen by domestic and foreign tourists. As for willingness to revisit Yangshuo, domestic and foreign tourists have similar results, nearly 50% of whom are willing to revisit Yangshuo. Tourists' willingness to make recommendation is also high, with only 5% of domestic tourists say that they will not make recommendation. In general, both domestic and foreign tourists have high degree of satisfaction rate with their tourism experience in Yangshuo, and those who are willing to revisit Yangshuo account for around 50%. It can be seen that tourism in Yangshuo

has high reputation among domestic and foreign tourists, which is beneficial to the sustainable development of Yangshuo tourism.

Chapter IV Health and Safety

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

4.1 Monitoring Indicators of Health and Safety

Table 4-1 Monitoring indicators of health and safety

Monitoring aspect	Main indicator
Health	Food hygiene
	Environmental hygiene
	Tourists' perception of food hygiene
	Residents' perception of health care
Safety	Medical safety and disease control
	Public safety
	Local public security
	Tourists' perception of accommodation safety
	Tourists' perception of local public security
	Residents' perception of criminal rate

4.2 Health

4.2.1 Food Hygiene

To provide a safe dining environment for tourists, the relevant department of Yangshuo carried out a special inspection in the food service industry for many times for the purpose of protecting the legitimate rights and interests of tourists. In 2013, 198 samples from the tableware disinfection center have been inspected, among which 196 are qualified and the qualified rate is 98.99%. In addition, among the 5329 employees from food, catering, public places and pharmaceutical stores who receive

health check, 5316 people are qualified and the qualified rate is 99.76%. The 13 unqualified people are diagnosed to have elevated transaminases.

4.2.2 Environmental Hygiene

(1) Carry out environmental hygiene monitoring on environmental hygiene

Daily and regular monitoring in an all-round way is carried out within Yangshuo County. Public area, restaurants, farm houses, and hotels are the objects to be monitored. The monitoring involves the overall environment of the public area and the hygiene conditions of food material, processing and tableware shall be monitored.

(2) Improve, perfect and implement the public hygiene emergency plan

(3) Carry out special events for health publicity and education

In 2013, authorities of Yangshuo County carried out various large-scale publicity activities, including providing cultural, scientific and health service to rural areas, and other activities on 3.24 World Tuberculosis Day, 4.7 World Health Day, 4.25 National Children's Vaccination Awareness Day, 5.15 National Prevention of Iodine Deficiency Disorders Awareness Day, Science and Technology Week, 5.31 World No Tobacco Day and 6.26 International Day Against Drug Abuse and Illicit Trafficking. Over 20 publicity banners were hung up, 430000 copies of publicity materials were handed out and around 30000 people consulted about those activities. Moreover, TV programs, movies, newspapers and periodicals, as well as text messages were utilized to keep the public aware of knowledge about disease prevention and reinforce their health concept.

(4) Promote supervision and training work

In 2013, seven sessions of training were organized for as many as 350 employees. Six guidance visits were paid to health institutes, four to basic public health service programs and one to hand-food-mouth disease projects.

4.3 Safety

4.3.1 Medical Safety and Disease Control

In 2013, Center for Disease Control in Yangshuo seriously implemented the working policy of "prevention first", further improved disease prevention and control system, rigorously performed the duties of disease prevention and put into effect critical disease prevention and control measures. The work has achieved remarkable results.

(1) Positively and effectively dealing with food-borne disease events

In 2013, two food-borne disease events (food poisoning) were investigated into and dealt with, and investigation into 17 patients were completed. Besides, prevention and control measures were put into effect. All events were finally under control, which prevented deterioration of the situation, ensured tourists' health and protected the reputation of Yangshuo.

(2) Prevention and control measures against infectious disease in place

In terms of infectious disease issues, Yangshuo authorities will look into where the tourists come from and conduct comprehensively body check for tourists when tourists have physical problems. Once an infectious disease is detected, patient isolation and comprehensive disinfection work will be carried out. Disease control measures are timely and targeted.

(3) Further improving and implementing Public Health Emergencies Contingency Plan

According to their nature, extent of injury and anticipated scope, the emergencies are divided into three levels. In addition, corresponding emergency measures are made so as to determine the leading group and its responsibilities.

4.3.2 Public Safety

Yangshuo County has successfully prevented all kinds of tourism production accidents, which is mainly the result of following regulations and measures:

(1) All kinds of training courses on safety management that could strengthen safety awareness of the enterprises

Yangshuo County Tourism Bureau carefully organized owners and managers from enterprises to take the training courses offered by districts, cities and counties on all kinds of safety management, carried out publicity activities about safe production, and firmly established and raised enterprises' safety awareness.

(2) Building a sound responsibility system for tourism safety in the whole county, rigorously carrying out tourist safety work

Yangshuo County Tourism Bureau created *Flood Control Contingency Plan for Yangshuo County Tourism System* and *Reception Contingency Plan for Yangshuo County Tourism*, as well as establishing safety emergency brigade. At the same time, the bureau required all starred hotels and A-level scenic spots to sign the *Safety Responsibility Agreement* and supervised the tourism enterprises to improve their working system such as the *Tourism Safety Contingency Plan*.

(3) Carrying out inspection activities about tourism and production safety

As required by departments in charge of tourism and safe production at district, city and county levels, and taking into account the reality of the tourism industry in Yangshuo, the county carried out timely special inspection activities during holidays, golden weeks and flood seasons focusing on tourism safety and safe production in the whole county as well as safe production month within tourism industry.

(4) Special treatment on key scenic spots/regions and key sections

Authorities intensively renovated activities in Li Jiang River, including carrying passengers with bamboo rafts, fishing launches or fishing boats, which ensured good tourist transportation order and safety.

4.3.3 Public Order

Yangshuo has good public order. Criminal rate in Yangshuo dropped by 10% during 2011 to 2012 and 2012 to 2013 respectively. Among the 111 counties/districts, Yangshuo County ranked 19th

regarding public security and the public's satisfaction with public security departments in 2011, 24th in 2012 and 5th in 2013, 19 places higher than in 2012. Both public security and satisfaction rate were increasing year by year.

4.4 Tourist Perception

4.4.1 Food Hygiene

More than 70% of the domestic and foreign tourists remain neutral towards and recognize the hygienic condition of food in Yangshuo, among which there are foreign tourists than domestic tourists. This indicates that the tourist evaluation on the environment of restaurant is above average and both of them are relatively satisfied with the local hygienic condition, though there is still room for improvement because about 10% tourists show disapprobation or high degree of disapprobation. According to the interviews, tourists' satisfaction with food hygiene in Yangshuo has two main reasons. One is that the dining environment is not satisfactory and needs to be improved. The other is that food quality problems cause gastrointestinal disease after meals.

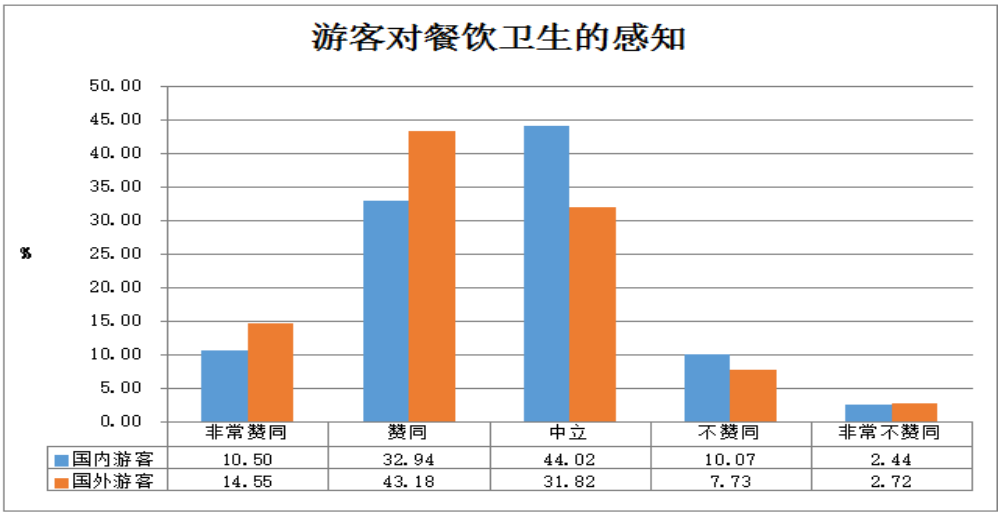


Figure 4-1 Tourists' perception of food hygiene

4.4.2 Accommodation Safety

Most domestic tourists remain neutral towards and recognize the accommodation safety in Yangshuo, and only 5% of them disagree or strongly disagree with it. However, most foreign tourists show high degree of approbation and approbation, and none of them show high degree of

disapprobation. It indicates that the satisfaction rate of accommodation safety is higher than that of food hygiene, and the general accommodation environment in Yangshuo is comfortable and more in line with foreign tourists' requirement. According to the interviews, although domestic tourists are interested in and show support to local folk-customs, they are inclined to choose standardized starred hotels. The reason is that most tourists are worried about the hygiene and safety of home stays, and think that the supporting service and facilities still need to be improved. Therefore, it can be concluded that accommodation safety in Yangshuo has room for improvement.

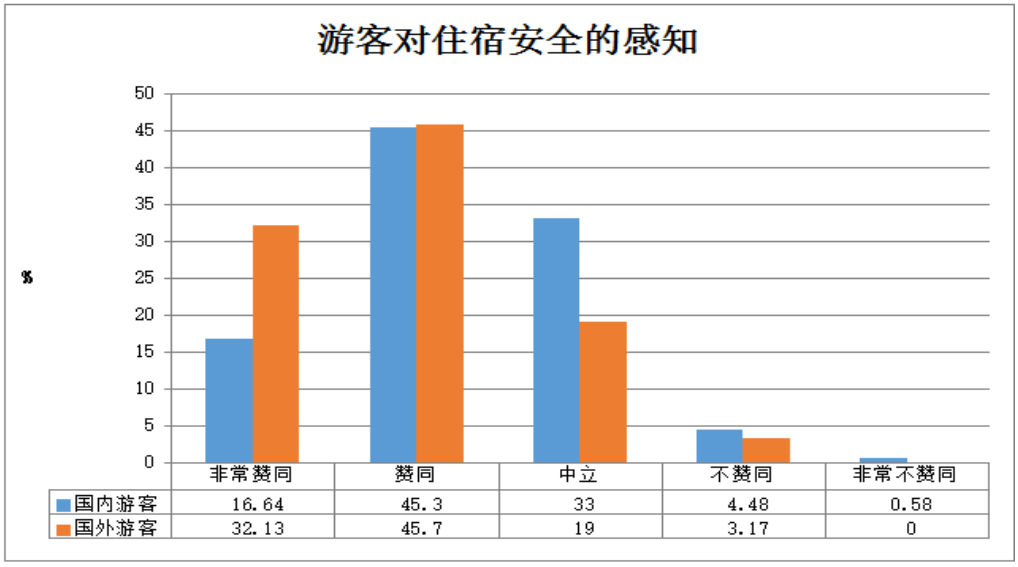


Figure 4-2 Tourists' perception of accommodation safety

4.4.3 Public Order

Most of tourists stay neutral towards and recognize the public order of Yangshuo. The foreign tourists' satisfaction rate is slightly higher than that of the domestic tourists. It indicates that both domestic and foreign tourists in general are satisfied with the public order in Yangshuo and consider Yangshuo a safe tourist destination.

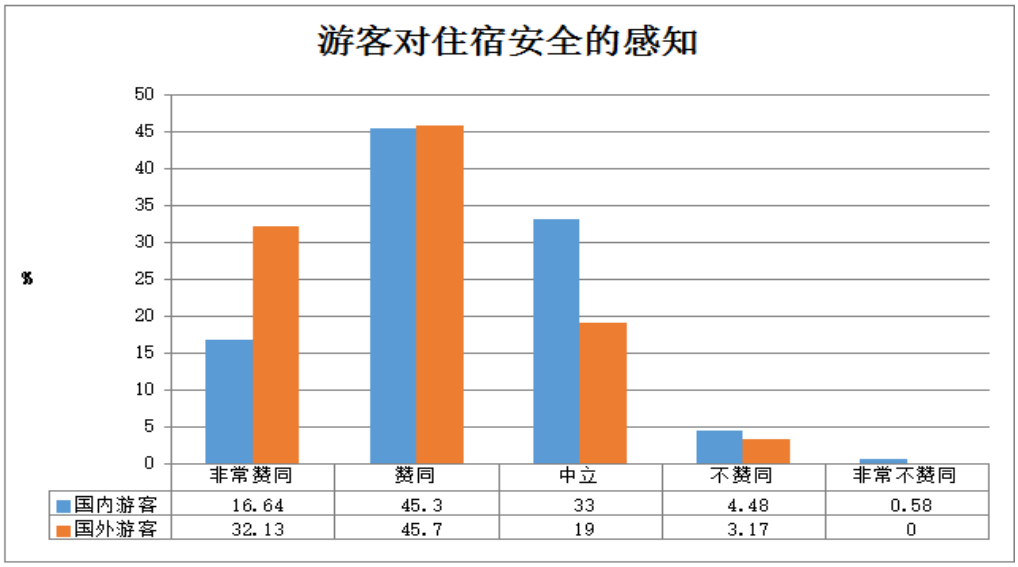


Figure 4-3 Tourists' perception of good public order

4.5 Residents' Perception

More than 60% of residents remain neutral towards, disagree with or strongly disagree with the statement that tourism increases the local criminal rate. Interviews with local residents show that the intensified renovation carried out by departments concerned in recent years has greatly reduced crimes such as theft and robbery and improved security environment. However, around 30% of residents still think that the criminal rate increases. Therefore, the government still have to further promote renovation of security environment so as to ensure residents' personal and property security.

Most residents remain neutral towards, disagree with or strongly disagree with the statement that tourism improves medical service. According to the interviews, residents generally believe that medical service level in Yangshuo during recent years is slightly raised and health care system has also been improved, especially for the elderly and children. Generally speaking, Yangshuo has good medical environment.

Table 4-2 Residents' perception of health and safety

Item / Evaluation	Increases criminal rate （%）	Improved medical care （%）
Strongly agree	6.41	6.64
agree	24.79	39.19

Neutral	29.91	35.33
Disagree	29.70	13.06
Strongly disagree	9.19	5.78

4.6 Summary of the Chapter

At present, the health and safety of Yangshuo is above average level. Tourists are quite satisfied with the food hygiene, accommodation safety and public order in Yangshuo, and foreign tourists have high degree of satisfaction rate than domestic tourists. Residents are quite satisfied with local security and health care. In addition, the government and relevant department have strengthened measures to regulate the hygiene of local food and environment to improve local order and cultivate a safe tourism atmosphere.

Chapter V Tourism Planning and Control

5.1 Monitoring Indicators of Tourism Planning and Control

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

Table 5-1 Monitoring indicators of tourism planning and control

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

5.2 Tourism Transportation Planning and Control

5.2.1 Significance of the Indicators for Transportation Planning and Control

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

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

The road system in Yangshuo County consists of national highways, urban main roads, secondary mains roads, and by-passes and footpaths, of which the transit national highways, when serving as urban roads, are 42 meters under red line control, the main roads are 24-32 meters under red line control, urban secondary main road, 12-18 meters, urban by-passes, 7-9 meters, footpaths, 4-6 meters, and pedestrianized streets, 9 meters. As Yangshuo County has various types of roads, a higher standard is required for traffic signs. It is found from the feedback information of the questionnaires, 33% of the foreign tourists think the traffic signs of Yangshuo are clear and reasonable and only 14% of domestic tourists agree on that point, which indicates that the weak traffic sign system in Yangshuo County causes inconvenience for tourists and affects Yangshuo’s brand image as an international tourism destination. Therefore, Yangshuo County needs to further strengthen its setting of traffic signs based on the roadway standard.

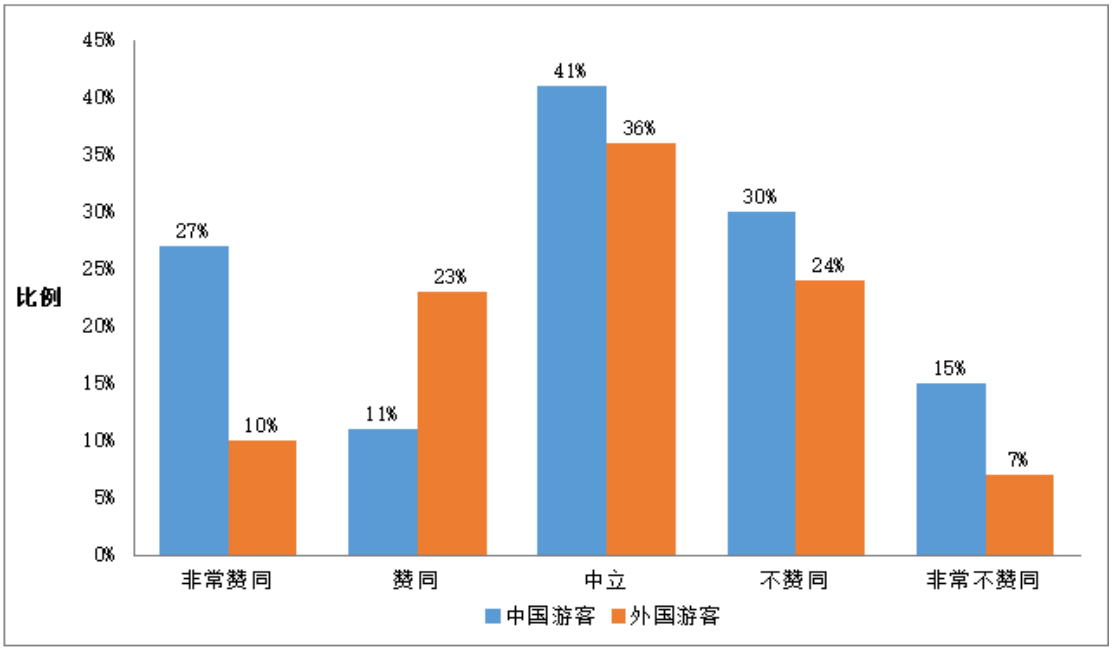


Figure 5-1 Tourist perception to the visibility of traffic sign recognition system

5.2.3 Passenger Station Needs Further Construction

Administratively, Yangshuo is a county-level city, thus, its passenger station shall be classified as a tertiary station, i.e. a station with the number of passengers dispatched of over 500 (including) (except those stations in the place of the county-level government which have been classified as primary and secondary stations; and stations in general tourist area). At present, Yangshuo County has two passenger stations, Shima Yuanpan Passenger Station and the North Station. For years, the tourism development has made Yangshuo passenger station become more mature in controlling passenger scale and number of runs. For example, Yangshuo passenger station can dispatch a coach to Guilin every 15 minutes, and runs of coaches to Guangzhou, Shenzhen, Foshan and other metropolises outside the province. However, as Yangshuo is a developed tourist city, its actual passenger flow can't be measured by the standard adopted by the general cities at county level, and its carrying capacity is comparable to the cities at municipal level. The existing passenger transport standard cannot meet the needs of the actual transport. It is clear in figure 5-2 that only 32% of the foreign tourists and 17% of the domestic tourists think the transportation in Yangshuo is convenient. According to the interviews, tourists think that the transportation is inconvenient mainly because of the traffic disturbance, the lack of traffic lights, the heavy traffic and the traffic congestion. Besides, many places have no buses bound for Yangshuo directly, which causes inconvenience and difficulties

for tours. Therefore, the present passenger transport standard still needs to be improved to satisfy the mass tourists.

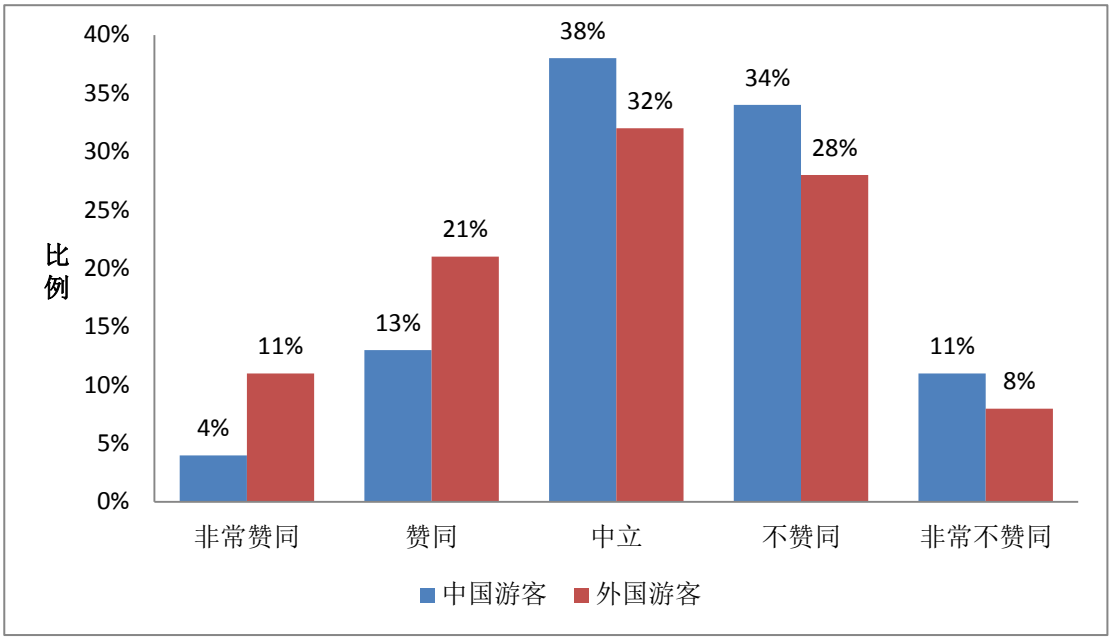


Figure 5-2 Tourist perception to convenient transportation

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

As shown in figure 5-3, 44% of the domestic tourists go to Yangshuo by long-distance bus，slightly less than the 64% in last year; Tourists go by train, by plane and by self-driving account for 31%, 22% and 19% respectively, more than that of last year in general. For foreign tourists, 39% choose long-distance bus, 33% choose plane and 22% choose train. Some tourists are not directly from original place to destination. As they stayed elsewhere before going to Yangshuo, they took more than one transport means to get to Yangshuo. For example, some foreign tourists went to China by plane and ship and then to Yangshuo by long-distance bus or car. What's worth mentioning is that with the opening of the Xingping Station along the Guizhou-Guangzhou hi-speed railway, it is expected that more tourists will choose hi-speed railway and less domestic tourists will go to Yangshuo by long-distance bus. However, compared with other transport means, long-distance bus is most popular among tourists to Yangshuo. So, in transportation planning, the improvement of road system is the top priority.

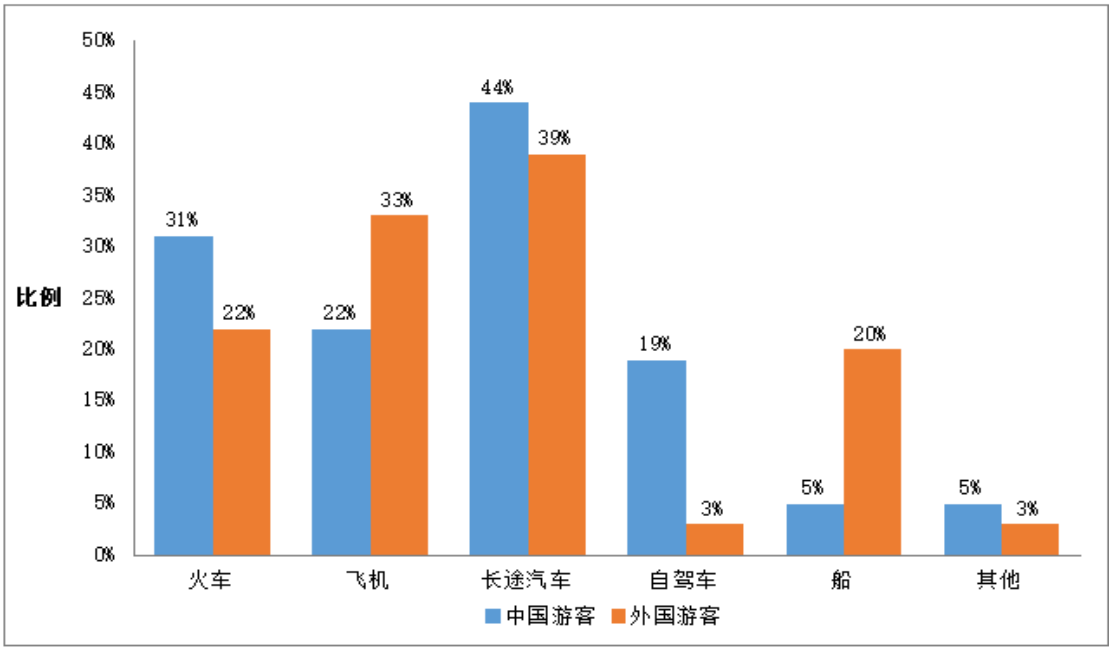


Figure 5-3 Choices of means of transport of tourists to Yangshuo

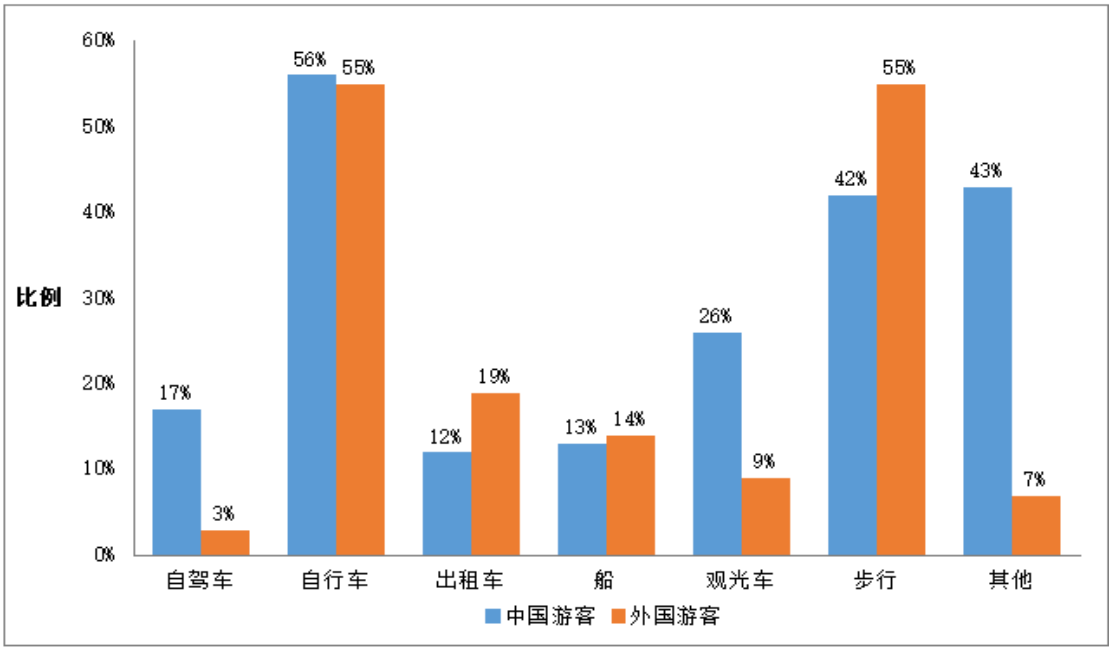


Figure 5-4 Choices of means of transport of tourists in Yangshuo

As shown in figure 5-4, 56% of the domestic tourists travel in Yangshuo by bike and 42% on foot; for foreign tourists, 55% by bike, and 51% on foot. Therefore, transportation construction in Yangshuo should emphasize sidewalk and green way planning. However, no bikeway is specially designed on the road of Yangshuo currently, and the sidewalk is crowded with peddlers. Given the tourist safety, it is a pressing need to build a green way for bikes and clean away the peddlers from the sidewalk.

5.2.5 Constant Improvement of Tourism Transportation System

In recent years, Yangshuo County proposed the development policy of "focus on the Southern area and improve the Northern area", insisted on relying on the built-up area to seek sectional development and formed the space layout of "double group and multi-section". In the 220.74-hectare land for tourism service facilities, the northern area, by renovating the administrative land in the old town, is mainly for travel and leisure, commercial finance, science research and education and residence, while the southern area, by building holiday resorts, hotels, international cultural exchange center and recreation and rehabilitation center, is mainly for vacation, administration, culture and sport and residence. It can be found that although both southern and northern areas of Yangshuo County have focused on tourism development, their development directions are different, which is particularly apparent in tourism service facilities construction and road traffic.

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

In terms of external transportation, Yangshuo hi-speed railway station is ready for operation, which will greatly ease the pressure confronted by Yangshuo passenger station. In terms of internal transportation, Yangshuo County has built an overpass at the entrance of West Street and is constructing a tunnel parallel to Pantao Road so as to ease the traffic pressure within the county.

5.3 Tourism Resources Planning and Control

5.3.1 Natural Tourism Resources are Still the Core Attractions

Yangshuo has abundant tourism resources. Reasonable planning and control of tourism resources are conducive to maintaining the rapid and steady development of local tourism. Monitoring the core tourism resources and landscape and understanding tourist perception to core tourism resources and landscape help to seize the key points of Yangshuo's tourism development. As shown in figure 5-5, the natural scenery of Yangshuo is the most important core tourism resource that attracts domestic and foreign tourists. 82% of the domestic tourists agree the natural scenery is the core attraction. 23% are attracted by the local folk customs and 23% are attracted by the leisure atmosphere; for foreign tourists, 91% are attracted by the natural scenery. Although, academically, folk customs, community residents, local architecture, and local tour guide of the destination may become the core attraction in tourism planning, less tourists to Yangshuo agree on that point. These figures indicate one thing: on one side, Yangshuo is a place with unique natural tourism resources and its resource development has been relatively mature, while on the other side, Yangshuo has no obvious cultural difference to tourists, thus, effort shall be made to further strengthen the cultural construction.

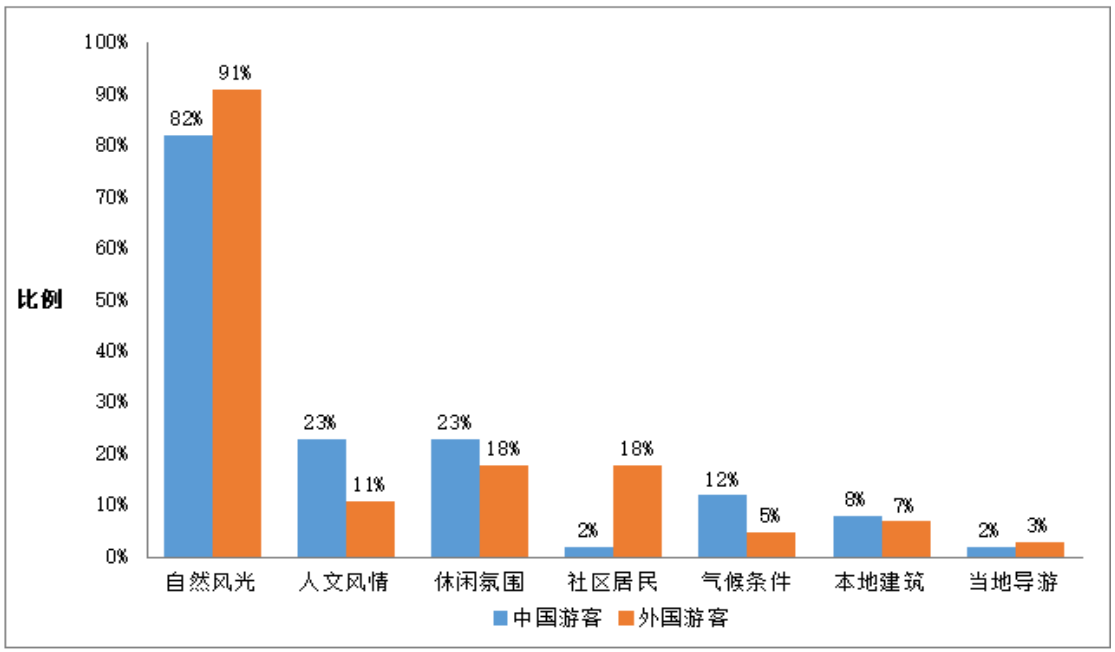


Figure 5-5 Core attraction to tourists

5.3.2 Tourists Gather at Famous Scenic Spots

The statistics and monitoring of tourist flow rate of different scenic spots help the tourism operators and managers better understand the tourism situation of Yangshuo and play an active role in promoting the development decision in the tourism industry and other related industry as well as preventing the dangerous incidents in travelling. The flow rate distribution to different spots of Yangshuo is uneven. Some core spots attract the vast majority of tourists. As shown in figure 5-6, according to the statistics, West Street, Lijiang River rafting, Yulong River and Scenery on the 20 Yuan Note are the core spots of tourism resources planning and control; 88% of the domestic tourists have been to West Street, the highest proportion of all other spots, 64% have been to Lijiang River, and over 30% have been to Big Banyan, Yulong River, Moon Hill and Scenery on the 20 Yuan Note. As for the less famous spots, such as Butterfly Fountain, Ancient Totem Path, Jianshan Temple and Big Banyan, most tourists are from tour groups. Because these spots are specially set for travel agencies, not many DIY tourists have been there. For foreign tourists, 84% have been to Lijiang River rafting, 70%, West Street, and over 30%, Yulong River, Moon Hill and Scenery on the 20 Yuan Note. Foreign tourists mainly choose famous spots and less than 10% have been there. As the spots both domestic and foreign tourists choose are basically the same, it is very important to control the flow rate of those places.

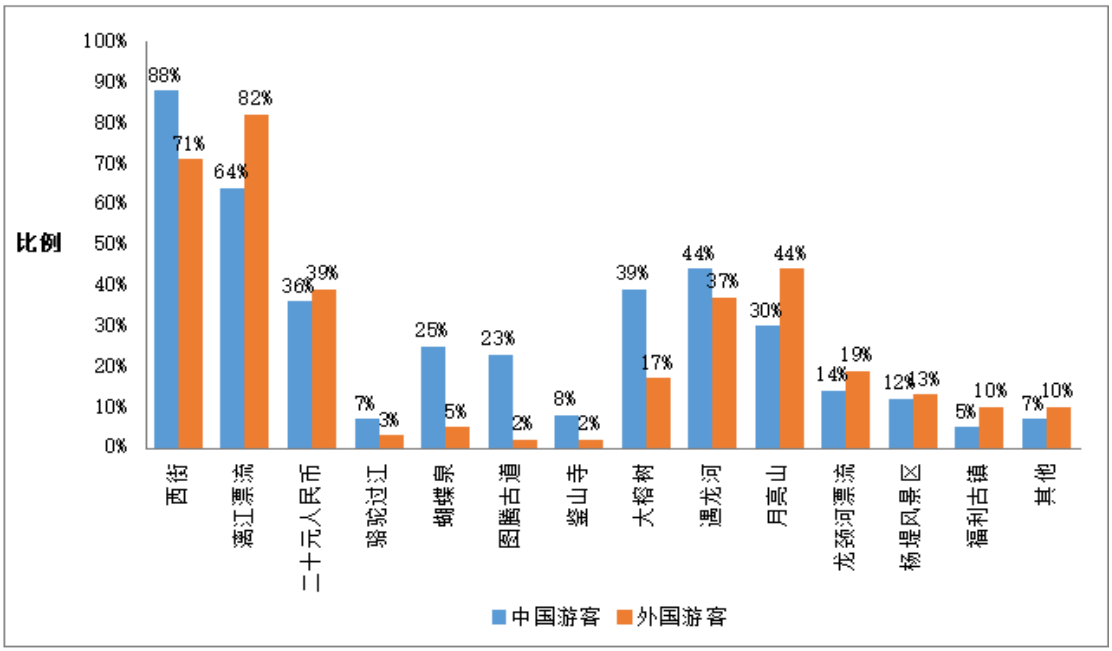


Figure 5-6 Scenic spots

5.3.3 Architectural Landscape Lacks Local Features

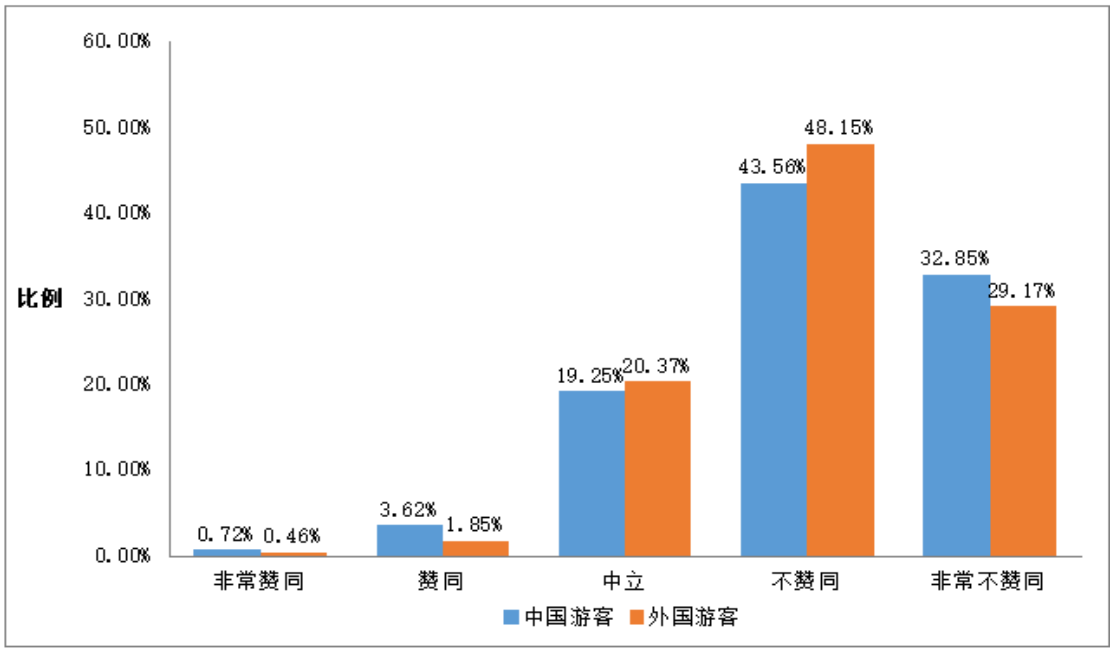


Figure 5-7 Tourists' perception of local folk customs

The core of the old city area is an important carrier of Yangshuo cultural connotation and characteristics, thus it should be done to strictly protect the overall urban style, make better use of the historic blocks. However, at present, only 4.43% domestic tourists and 2.31% foreign tourists think that Yangshuo is full of local folk customs, which indicates that Yangshuo still has more work to do to develop local folk customs. According to the interviews, tourists think that Yangshuo is lack of local folk customs mainly because the county is modernized and lack of characteristic architecture, and West Street is similar with pedestrian streets in average cities, failing to show its characteristics. Most of those who think that Yangshuo has local folk customs have been to the old city area where there are buildings with local features and they speak highly of Secret Garden Boutique Hotel, a hotel based on an internally renovated old house. Under the impact of modernization and globalization, the major problem Yangshuo confronted is how to properly utilize various natural landscape and cultural landscape, remedy, restore and display original historical and cultural perceivable elements, exploit urban historical and cultural connotation, and demonstrate the core style of Yangshuo as a national historical and cultural city.

5.4 Proper Increase of the Proportion of Tourism Land

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

(Unit: hectare)

Land-use categories	Yangshuo Town	Baisha Town	Fuli Town	Xingping Town	Gaotian Town	Yangdi Town
The total land area	7528.95	15383.14	23285.21	31376.89	15492.93	10263.55
Forest area	1831.07	4667. 48	6344.59	10028.94	7984.56	5632.98
	24.32%	30.34%	27.25%	31.96%	51.54%	54.88%
Urban construction land	860.1	121.27	116.23	49	50.06	0
	11.42%	0.79%	0.5%	0.16%	0.32%	0
Mining and independent construction land	71.15	160.07	110.98	133.4	134.88	30.56
	0.95%	1.04%	0.48%	0.43%	0.87%	0.3%
Rural residential land	139	402.99	498.75	375.94	392.92	125.35
	1.85%	2.62%	2.14%	1.2%	2.54%	1.22%
Land for scenic, natural and cultural protection	1940.64	2168.54	3899.89	12143.08	876.71	2397.79
	25.78%	14.1%	16.75%	41.89%	6.3%	23.36%

Others	411.84	811.73	4584.22	1179.71	545.08	496.98
	5.47%	5.28%	19.69%	3.76%	3.52%	4.74%

(Source: Land Resources Bureau of Yangshuo County)

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

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

point of Gaotian in its land use. It shall provide enough lands for vegetables, plants and agricultural facilities and allocate land for handicraft processing and tourism facilities reasonably. Table 5-2 shows the land use in tourism towns and villages in Yangshuo County (2006 - 2020).

5.5 Summary of the Chapter

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

5.5.1 Strengthen the Planning and Construction for Tourism Transportation

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

5.5.2 Strengthen the Protection of Natural Tourism Resources

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

5.5.3 Develop Rational Plans according to the Tourism Development of Yangshuo

In addition, the conversion of land function and the use of land are the basis of sustainable development planning for tourist destinations. The tourism planning and control of Yangshuo must match with its actual situation while practical plans are formulated from the perspective of development. It is imperative to exercise strict control and requirements over the implementation of plans. To lay a solid foundation for the tourism development of Yangshuo, it is required to take into account the tourism transportation, tourism resources endowment, land use and urban architectural landscape and style, draw on advantages and avoid disadvantages, control negative factors, and ensure the planning is scientific and rational, in the process of planning and control.

Chapter VI Economic Benefits of Tourism

6.1 Monitoring Indicators of Economic Benefits of Tourism

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

Table 6-1 Monitoring indicators of economic benefits of tourism

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

	Impacts of tourism on employee's compensation and satisfaction
Impacts of tourism on Yangshuo investment	Data of County Investment Promotion Bureau and owner’s perception to investment
Seasonality in Tourism	Tourism statistics (Occupancy rate, number of tourists per month)
	Off-peak and peak seasons
	Impact of tourism seasonality on employment

6.2 Steady Expansion of Yangshuo’s Tourism Industry

Statistics of Yangshuo County Tourism Bureau shows that in the first half of 2014 (till May) Yangshuo received a total number of 3.791 million tourists, up 6.5% on a year-on-year basis, with the gross tourism receipts of 2.43 billion Yuan, up 16.9% on a year-on-year basis. Of all the tourists, 3.257 million are from China and 534,000 are from abroad. The number of inbound tourists staying overnight amounts to 243,000, the per capita consumption is 538.9 Yuan and the average length of stay is 2.24 days.

Table 6-2 Statistics on Yangshuo Tourists (2010-May 2014)

Year / Indicator	2010	2011	2012	2013	January – May 2014
Total number of tourists (10,000 person-time)	811.3	935.6	1050.3	1170.8	379.1
Of which: foreign tourists (10,000 trips)	123.8	155.3	171.2	188	53.4
Number of occupants (10,000 c)	279.2	315.8	-	432	178
Average length of stay (day)	1.38	-	-	-	2.24
Gross tourism	31.5	38.6	50.2	60.5	20.43

receipts					
per capita consumption (Yuan/person)	388.3	412.6	-	516.7	468

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

According to Table 6-2 the number of tourist arrivals in Yangshuo County continues to increase. The gross tourism receipts in 2012 exceed 5 billion Yuan while in 2013 the number has reached a historic high of 6.05 billion Yuan. Yangshuo's tourism has witnessed a steady growth, including the number of occupants, the per capita average length of stay and per capita consumption, which indicates an increasingly sophisticated accommodation and other necessary conditions and thus a stronger attraction to tourists.

The expected goals of the economic and social development of Yangshuo in 2014 is: to fulfill the Twelfth Five-Year Plan mission on tourism, economic and social development, achieving an average annual growth of 10% in tourist number and 20% in tourism receipts, which means 12.89 billion in tourist number and 7.26 billion Yuan in tourism receipts.

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

6.3.1 Contribution of Tourism to GDP Increases Year by Year

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

Table 6-3 GDP and tourism receipts growth of Yangshuo from 2001 to the first half of 2014 （Until May）

Year	GDP (as per the pricing of the current year) (100 million)	Tourism industry (as per the pricing of the current year) (100 million)	Proportion of Tourism to GDP

	Gross	Growth rate	Total revenue	Growth rate	
2001	10.54	-	2.14	-	20.30%
2002	11.36	9.32%	2.41	12.62%	20.21%
2003	11.75	9.18%	2.44	1.24%	20.77%
2004	14.31	14.57 %	4.06	66.39%	28.37%
2005	17.89	7.74%	5.51	36.21%	30.80%
2006	22.91	23.32 %	9.64	74.85%	42.08%
2007	33.06	10.30 %	12.77	32.47%	38.63%
2008	39.67	10.30 %	17.90	40.17%	45.12%
2009	43.23	10.96 %	24.20	35.20%	55.98%
2010	56.12	24.10 %	31.50	30.17%	56.13%
2011	69.03	23.00 %	38.60	22.54%	55.92%
2012	76.40	10.68 %	50.20	30.05%	65.71%
2013	84.39	9%	60.5	20.5%	71.69%
The first half of 2014 (Until May)	-	-	20.43	16.9%	-

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

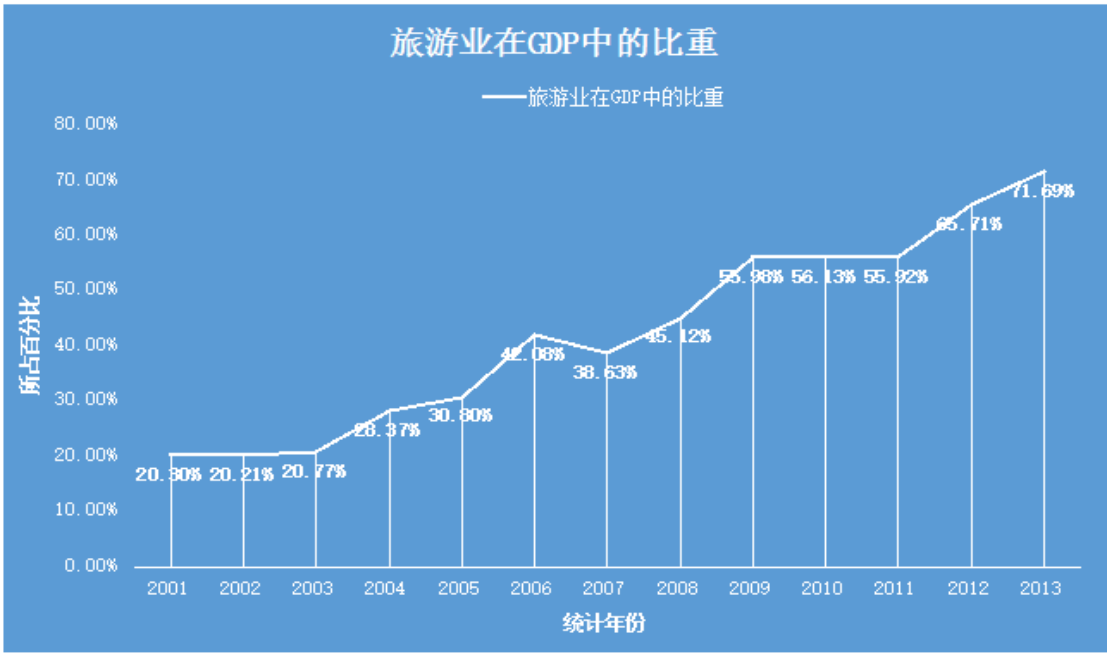


Figure 6-1 Proportion of tourism to GDP in Yangshuo County

According to Table 6-3 and Figure 6-1, the contribution of tourism to Yangshuo's GDP has been increasing on the whole since 2001 despite fallbacks and fluctuations in some individual years. Moreover, the contribution of tourism to Yangshuo's GDP in 2012 and 2013 increased dramatically, reaching over 60% and 70% respectively. Through the monitoring process, local residents have the deep understanding: "Yangshuo relies heavily on tourism", "Yangshuo embodies tourism." Such replies were of nothing new.

6.4 Impact of Tourism Seasonality Remains

In 2013, the tourism of Yangshuo showed some traces of seasonality. The average number of domestic tourists received per month from July to November in 2013 reached 300,000 while in January and February the number was less than 250,000. However, despite some seasonal differences, the disparity is not significant. In terms of the gross tourism receipts, the number of tourism received goes with seasonality. From August to November, the gross tourism receipts per month are 44.03122 million Yuan and from December to March are only 12.22814 million Yuan, indicating the close relationship between seasonality and the summer holidays and golden weeks.

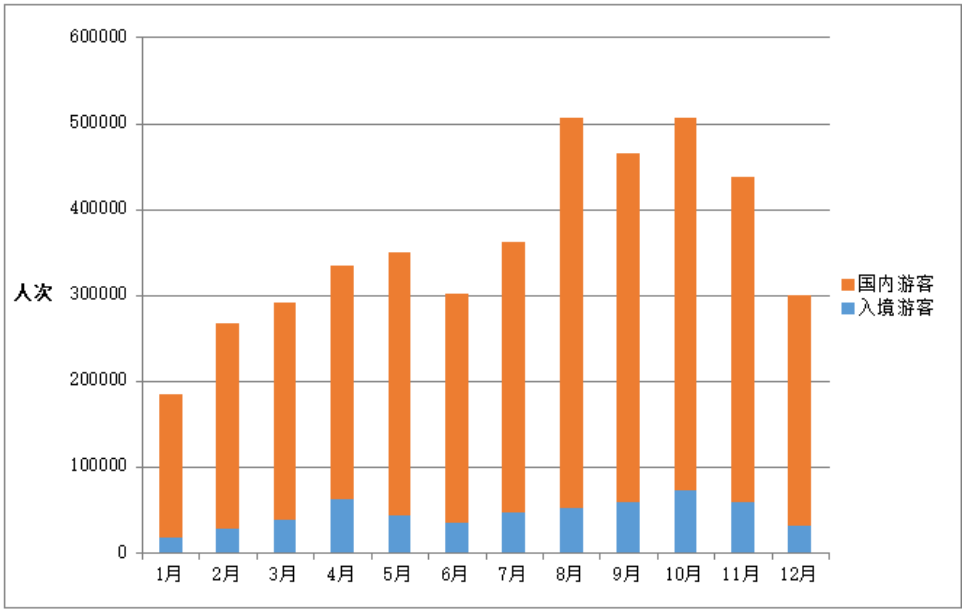


Figure 6-2 Number of domestic and inbound tourist received in Yangshuo County in 2013 (Monthly data)

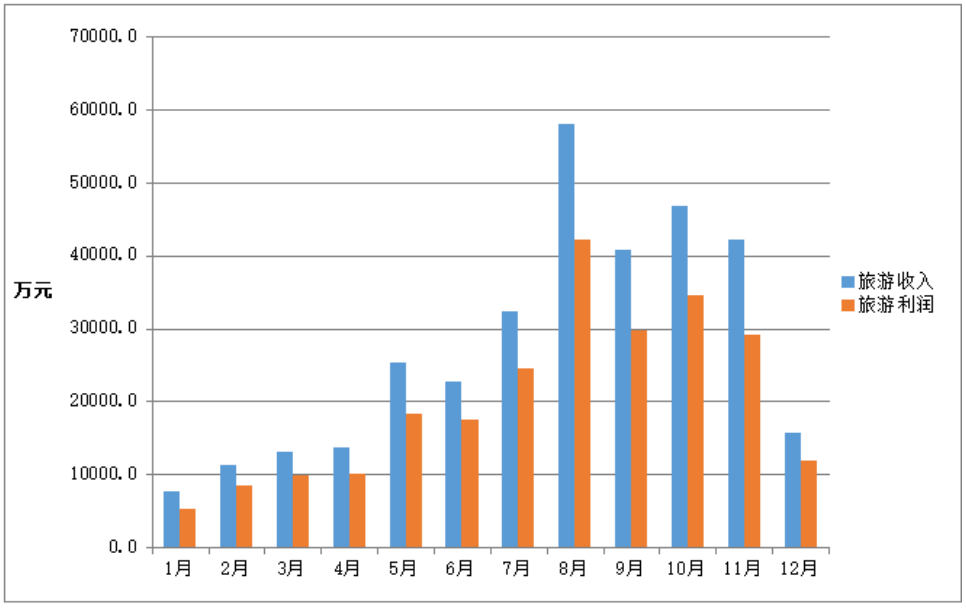


Figure 6-3 Gross tourism receipts and profits in Yangshuo County in 2013 (Monthly data)

According to the analysis of the questionnaires for business owners, 28.95% of the employers regard May and 25% regard July as the start of peak season, and 56.41% think October is the end of peak season. Taking the number of tourism received and the number the gross tourism receipts into consideration, the peak season of tourism in Yangshuo is roughly from April to October.

The seasonality brings an impact on enterprise employment and job opportunities in tourism. Among 80 enterprises, except from 38 which have no hired laborers, the remaining enterprises, their average number of hired laborers is 7.55 in the peak season while 5.4 in the low season. Additionally, there is a great difference in the number of hired laborers between enterprises in the peak season. According to the field monitoring, many enterprises especially youth hotels will hire "volunteer vacationers" while catering enterprises in West Street will hire summer workers during the summer holidays, both providing plenty of short-term jobs.

6.5 Investments on Tourism Reaches Record High

In recent years, Yangshuo County has a clear overall development orientation that is to develop itself as a leisure resort destination and an agricultural production and processing base. Taking tourism, industries and technologies as three development strategies, Yangshuo strives to push the economic development and has obtained a certain result in opening to the outside world and attracting investments. A lot of renowned enterprises, which has become the mainstays of tourism, cultural and real estate industries, have settled in Yangshuo, including the Taiwan-invested Guilin Yangshuo Landscape Tourism Development Co., Ltd. (Chinese Wonderland), Guilin Shanshui Stone Industry Co., Ltd., Guilin Guangwei Wenhua Tourism Culture Industry Co., Ltd. (Impression on Sister Liu), Paradesa Yangshuo Resort invested by Malaysia Hotel Sentral Pudu Co., Ltd., Singapore-invested Guilin Yangshuo Quanye Hotel Development Co., Ltd. and Banyan Tree Yangshuo Co., Ltd., and Canton-invested Yangshuo Resort Hotel Co., Ltd..

In 2013, Yangshuo County, steadily promoted the construction of "Guangxi Famous Tourism County with Unique Features", to attract more high-end tourism projects and more funds. 4 new projects like each with an investment of over100 million Yuan "Relais & Châteaux", "Yangshuo Hongshang Shengjing Tourism and Health Industrial Project" and "Singapore Design Studio Leisure World" were introduced and 1.5 billion Yuan domestic funds as well as 31 million USD foreign funds were attracted, which indicated the investment indicators have reached a record high. In the first half of 2014, Yangshuo County carried out 5 new key projects and continued to work on 5 other projects. During 2014 to 2018, the key projects on tourism include: Yangshuo Design Studio Leisure World with a total investment of 3 billion Yuan and a construction scope spreading Recreational scenic area,

amusement park, amenities, resort hotels and other tourism infrastructures; Yangshuo Eco-Agricultural Tourism with a total investment of 600 million Yuan and a construction item of leisure agriculture and village tours characterized by “the flowers in Spring, the wind in Summer, the fruits in Autumn and the snow in Winter”; Yangshuo County ·Fenghuang Valley Leisure Resort with a total investment of 2.18 billion Yuan and a construction scope over village, leisure and health, arts and characteristic cultural street; Yangshuo County Tourism Town with Distinctive Features and Tourism Villages with a total investment of 5 billion Yuan on 9 special towns; Modification and Expansion of Passenger Terminal on Yangshuo County with a total investment of 150 million Yuan on 9 passenger terminals. Apart from the above, there are 11 other upcoming projects.

In addition to the tourism investments made by the government authorities of Yangshuo, many business owners in Yangshuo are optimistic about the tourism investment. According to the on-site survey, the average rating of Yangshuo tourism investment from 79 owners in the questionnaires is 3.95, and the owners who turn bearish on tourism has dropped from 6.6% to 3.8%, which shows that the business owners are optimistic about the tourism investment prospect in Yangshuo, and more optimistic than last year.

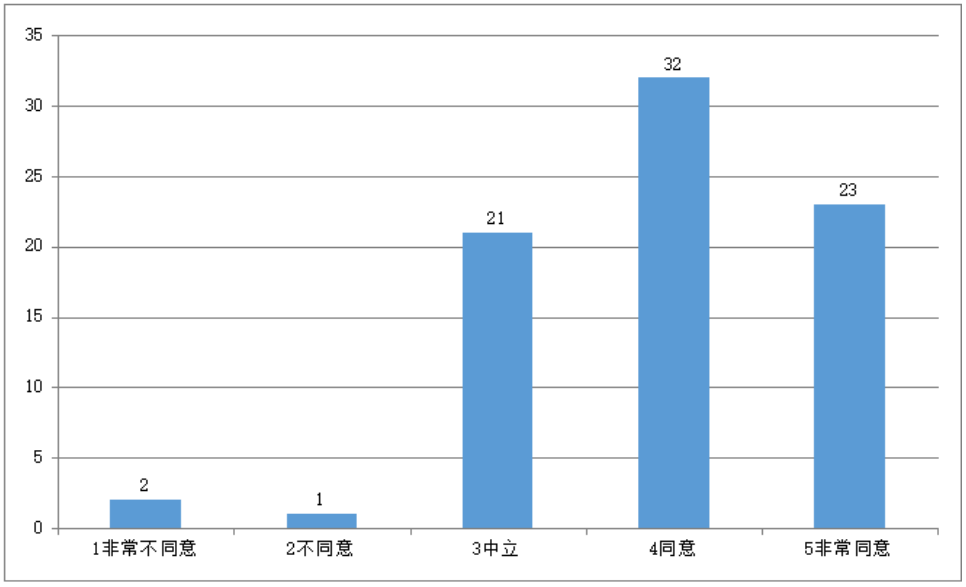


Figure 6-4 Degree of optimism of owners to the tourism investment in Yangshuo

6.6 Impacts of Tourism on Resident Employment

6.6.1 More Employment Opportunities for Yangshuo Local Residents

According to the results of the questionnaires for 468 residents, the average rating of "Tourism development has brought more job opportunities" in the questionnaires is 3.95, and 80.13% of the residents agree that tourism has brought more job opportunities, indicating that residents have generally realized that tourism played an active role of in local employment.

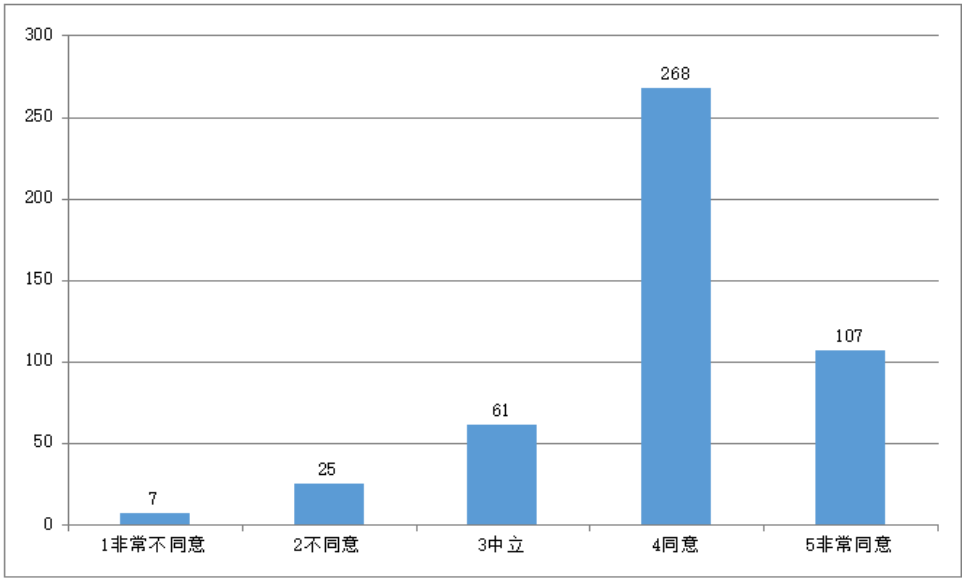


Figure 6-5 Tourism development has brought more job opportunities

According to the questionnaires for tourism enterprises employees, 58.3% of them are from Yangshuo, 7.8%, Guilin (excluding Yangshuo County), 14.4%, other regions of Guangxi, and 17.2%, other domestic regions outside Guangxi. Of these employees, 53.4% think Yangshuo can offer adequate job opportunities to laborers, which reflects that Yangshuo tourism has attracted many outsider workers.

6.6.2 Help Transfer of Rural Population to Other Industries

As a typical rural county, the basic industry of Yangshuo is agriculture. However the development of tourism has changed the occupational pattern, pushing rural labors to move to other industries. Meanwhile, the combination of tourism and agriculture props up both agricultural

development and new rural reconstruction. In 2013, the rural per capita net income reached 9,592 Yuan, up to 14.5%, the industry structure was optimized and adjusted from 27.6 ：30.9 ：41.5 in 2008 to 24：36：40 in 2013, and the labor transferred from the primary industry to the secondary and tertiary industry, especially the secondary industry.

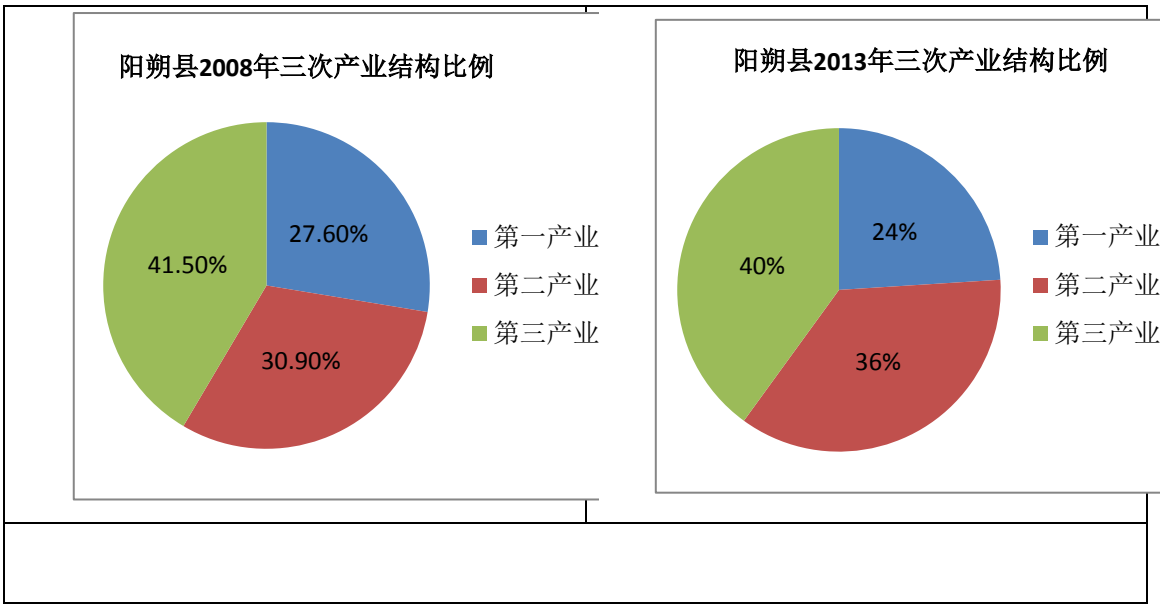


Figure 6-6 Change of industry structure in Yangshuo County: 2013 compared with 2008

6.6.3 Promote Development of Education and Training Industry and Improve Resident Employable Skills

With the massive influx of foreign tourists, many local residents have a good command of English. In Yangshuo, at first, the number of foreign tourists was more than that of domestic tourists. In the early stage of tourism development, the frequent contact between residents and foreign tourists offered a chance to residents to learn English and improve their capabilities so as to help them get a better job and improve the living standard. “Mama Moon” is a typical example. Mama Moon is a native resident of Yangshuo, who learned English by leading the way for foreign tourists, and became a professional English tour guide. Besides getting a job, she also built her own brand – “Mama Moon” for her restaurant.

In addition, as an “international leisure resort town” and later as the ties between Chinese and Western cultures, Yangshuo also promotes the flourishing growth of the local education and training organizations through its tourism development. These organizations can not only enable more local residents to learn English and improve their employable skills, but also attract more out-of-town

tourists to learn English, contributing to the local tourism development. According to the field survey, some English summer camps and English training classes spring up in summer holidays.

In the questionnaires for residents and employees, 35.47% of residents learn English every day, and the percentage of employees is 45.4%. According to the questionnaires for business owners, 53.3% of them state that most of the employees are able to communicate with foreign tourists in English and 55.9% state that English is a required skill for the employees. According to the field survey, the service workers of most bars, restaurants and hotels around the West Street are able to communicate with foreign tourists in English, and even the middle-aged and elderly women who are peddling alongside the river are able to bawl their wares in English.

6.7 Impacts of Tourism on Industry Structure

The shops in the county are classified into nine parts. The first seven parts have a direct bearing on the tourism industry. To further analyze the impacts on tourism industry structure, the analysis over the change of tourism industry structure is discussed in 6.8.

6.7.1 Development of Characteristic Agriculture

Figure 6-6 (6.6.2) shows the proportion of primary industry in Yangshuo County has dropped comparatively, but the plant construction has been optimized. Local natural advantages were taken to develop specialty agricultural products like kumquat. Baisha Town of Yangshuo County has been rated as the land of kumquat, and its Shatian pomelo is very popular, too. In 2013, the agricultural development of Yangshuo progressed steadily. Its total value of farming, forestry, herding and fishing reached 3.1 billion Yuan, a rise of 5.73%, among which the total grain output reached 120, 100 ton, an increase of 2.7%. As for characteristic agriculture, the newly built kumquat plants covers an area of 15,900 mu, with its total coverage of 174,000 mu and a total output of 179,300 ton, ranking the first in coverage, output and benefits. The quality and benefits of sugar orange (Shatangju), summer orange, Shatian pomelo, black sugarcane, Chinese yam and other famous specialty agricultural products are further increased, among which the output of honey and Lijiang River soft-shelled turtles rank the first in three consecutive years in Guilin.

Remarkably, Yangshuo has launched the National Standard Project of Kumquat in 2013, and successfully hosted the 11th Kumquat Fair, the 3rd Flower Seedling Fair and the 2nd International Retail Guangxi (Yangshuo) Fair. Since tourism has pushed the development of characteristic agriculture, modern agriculture which is concurrent with the development of characteristic agriculture is definitely the next one to watch.

6.7.2 Diverse Handicraft Business

In the survey, the business district can be divided into three parts according to the crowding level of tourists: Area A, Area B and Area C. Area A, which covers 13 streets, including New West Street, West Street, Shenshan Road, Pantao Road, Baoquan Road, Guihua Road, Fuqian Road, Furong Road, Diecui Road, Chengzhong Road, Chengbei Road, Riverside Road, Bilian Lane, Baoquan Road, is the tourism central business district as well as the most densely populated area. Area B, which covers 9 streets, including Chengxi Road, Fuyuan Road, Xiangshui Road, Wuteng Lane, Jingfeng Road, Longyue Road, Huashan Road and Lanhua Road, is the transition area between tourism area and residential area, and thus, has fewer tourists than Area A. Area C, which covers 8 streets, including Wujing Road, Shima Road, Sangyuan Road, East Road, Mingfeng Road, Jingshi Road, Kangzhan Road and Guanlian Road, is the residential area and has the fewest tourists

This survey involves 2770 shops in Yangshuo, among which souvenir shops mainly with handicrafts and specialty agricultural products account for 8.88% of the total. Yangshuo-featured handicrafts include bamboo carvings, wood carvings, bamboo mat, calligraphies and watercolor paintings, painted fans, marble and talc products, landscape disk, stone products, ethnic embroidery, jewelry, colorful silk balls, T-shirts, antique ceramics, etc. The stalls, shops and outlets retailing handicrafts in the County are mainly found in places with numerous tourists like West Street, Chengzhong Road, Pantao Road, and New West Street. Figure 6-7, 6-8 and 6-9 demonstrated the distribution of stalls, shops and outlets in Area A, B and C. The proportion of souvenir shops has seen a slight increase. In the tourist populated area such as West Street and Riverside Road some brand-new souvenirs have emerged spreading chili sauce, candies and su (a kind of traditional Chinese shortbreads), which indicated that tourism had driven the development of handicrafts. The development of handicraft business provides good employment chances for the residents and facilitates inheritance of local traditional handicraft techniques. According to the survey, however, the

problem of homogeneous souvenirs arises and the brand-new souvenirs have nothing to do with Yangshuo features. On one hand, it shows the high level of commercialization, on the other hand, it indicates the over competition among shops and the impact of exotic cultures.

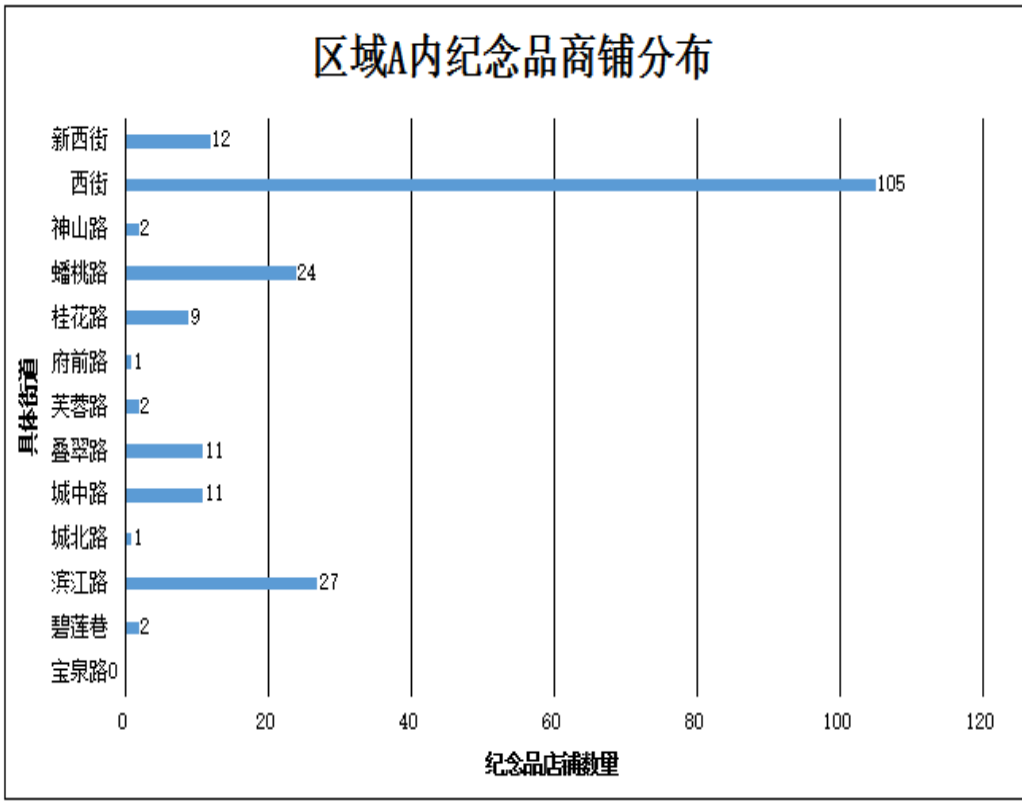


Figure 6-7 Distribution of souvenir shops in Area A

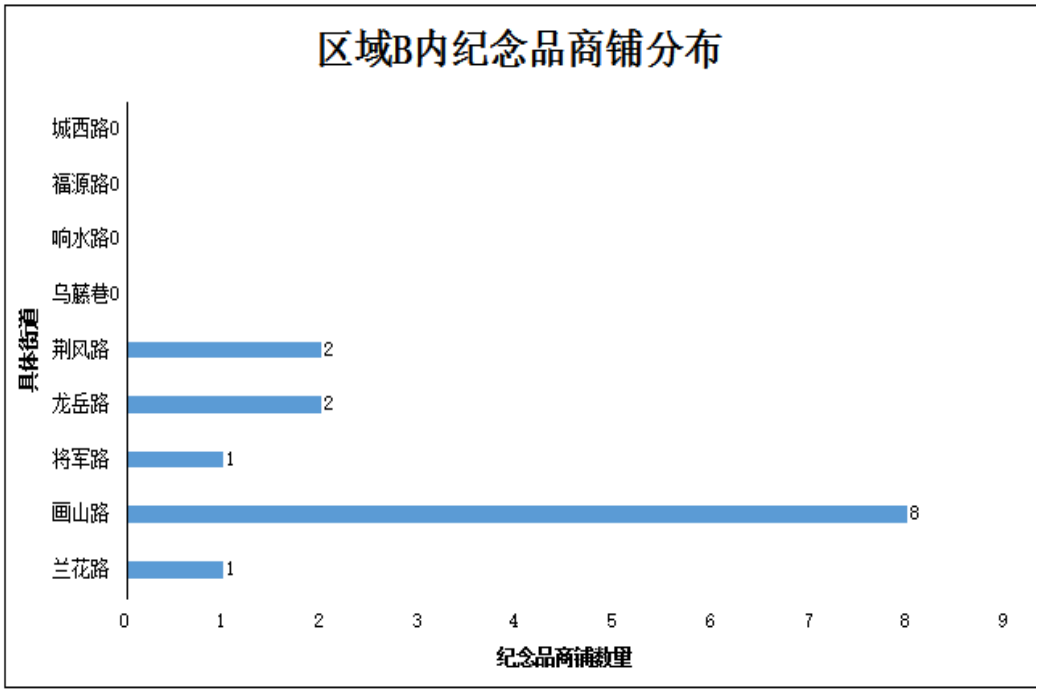


Figure 6-8 Distribution of souvenir shops in Area B

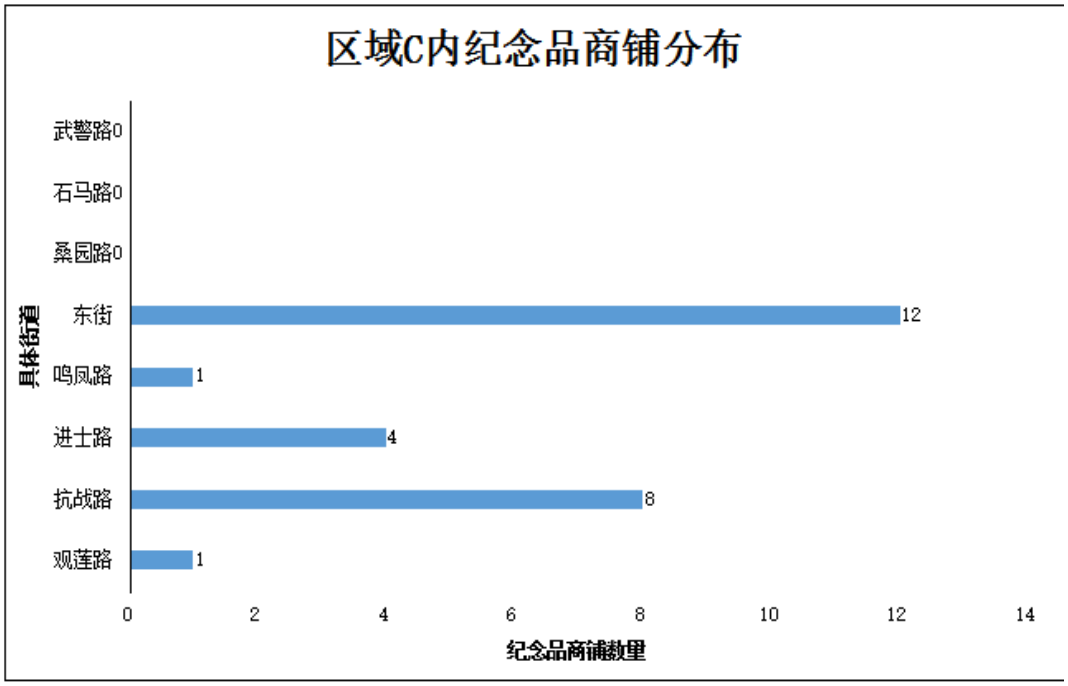


Figure 6-9 Distribution of souvenir shops in Area C

6.8 Impacts of Tourism on Yangshuo's Commercial Development

6.8.1 Overall Impact Analysis: Proportion of Tourism Shops Increased and Competition among Small Enterprises Intensified

This survey involves 30 main streets, up by 3 than last year, and 2770 shops, up by 299 than last year, a markedly increase. Despite the increase of statistical objects, it shows the significant increase of shop number.

Table 6-4 Types of shops in Yangshuo County

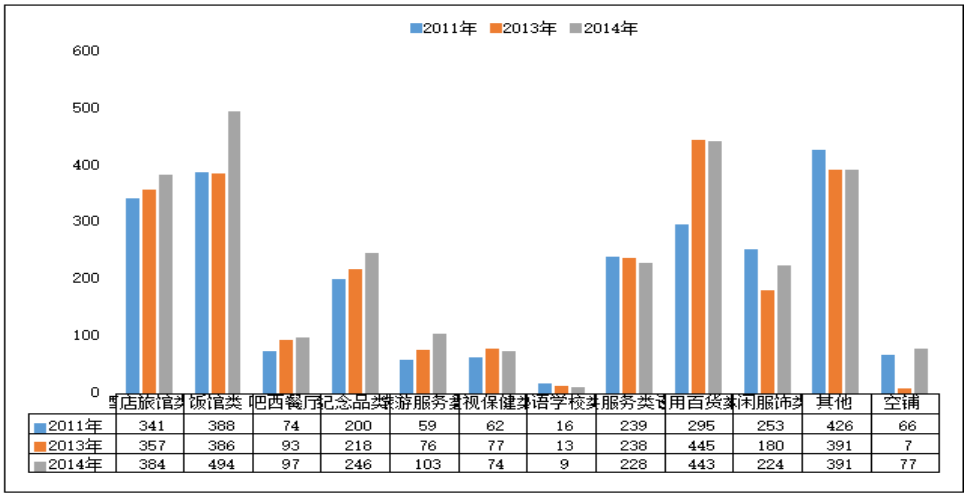
Shop type	Quantity in 2013	Proportion in 2013	Quantity in 2014	Proportion in 2014
Hotel	357	14.45%	384	13.86%
Restaurant	386	15.62%	494	17.83%
Bar and western restaurant	93	3.76%	97	3.50%
Souvenir	218	8.82%	246	8.88%
Tourism services	76	3.08%	103	3.72%
Chinese health area	77	3.12%	74	2.67%
Foreign language school	13	0.53%	9	0.32%
Public service facilities	228	9.23%	228	8.23%
General merchandise	445	18.01%	443	15.99%
Casual wear	180	7.28%	224	8.09%
Others	391	15.82%	391	14.12%
Vacant store	7	0.28%	77	2.78%
Total	2471	100.00%	2770	100%

The increase of tourists in the last two years shows that tourism remains dominant in the commercial development of Yangshuo and positively promotes the shop development. What's more,

the number of tourism-related shops, such as restaurants, souvenirs and tourism services, is on the rise, while the number of general merchandisers and public service facilities facing to the local residents is on the decline. As the tourism progresses, the increase of tourism shops increases, intensifying the competition among small tourism enterprises. When the total number of shops increases, the proportion of hotels, bars and western restaurants decreases, indicating that Yangshuo is undergone structured adjustment due to the exacerbated competition.

According to the comparison between the number of shops in 2013 and the number of shops in 2014, besides the goods and services, the homogenization of tourism shops is evidenced by the changes of shop names. Take Kangzhan Road as an example, there is a sector boomed with shops of Guilin Rice Noodles, where statistics show that the names of such shops has changed into the same form of "[Name] Century-Old Authentic Guilin Rice Noodles" in spite that the content is all the same as last year's. This shows that the homogenization of shop names has become clear due to the exacerbated competition.

The number of vacant shops is also on the rise. The monitoring group detects that many vacant shops are under reconstruction and rebuilding, the newly-built shops are larger than the former ones and many are distributed on the main street (Kangzhan Road) of the city. Despite the influence of city master plan, it is because larger-scaled and more competitive tourism shops have settled here, indicating the further commercialization which is to be tracked according to future monitoring results.



	客店旅馆类	饭馆类	吧西餐厅	纪念品类	旅游服务类	视保健类	语学校类	服务类	用百货类	闲服饰类	其他	空铺
2011年	341	388	74	200	59	62	16	239	295	253	426	66
2013年	357	386	93	218	76	77	13	238	445	180	391	7
2014年	384	494	97	246	103	74	9	228	443	224	391	77

Figure 6-10 Comparison between types of shops in 2011, 2013 and 2014 in Yangshuo County

6.8.2 Change of Commercial Form under Tourism Impact

6.8.2.1 Shop Use Function: Adjustments of Tourism Shop Structure; Shops for Residents Increase

It is obvious that the proportion of shops for residents has seen an increase after a drop from the statistics in 2011, 2013 and 2014.

To better understand the function changes of shops, the use function is divided into three parts based on the group to which the products are sold, by reference to the impact of tourism on commerce proposed by the domestic scholars Bao Jigang and Su Xiaobo: tourists, tourists and residents, residents. Figure 6-11 is prepared according to the statistical data in 2011, 2013 and 2014.

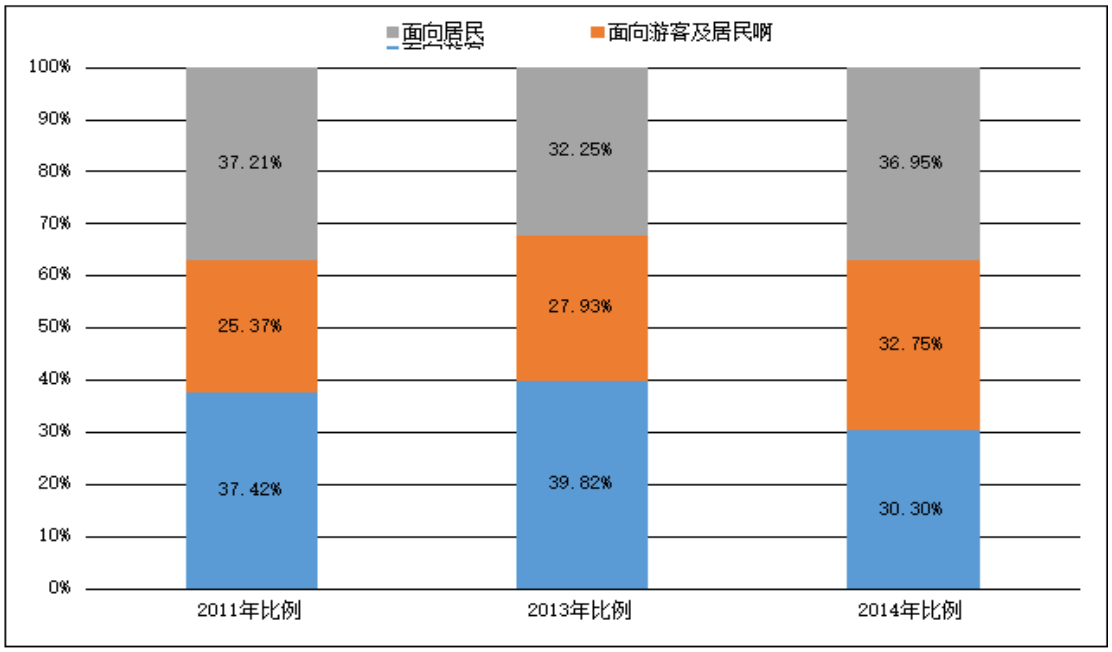


Figure 6-11 Comparison between shops of different use functions in 2011, 2013 and 2014

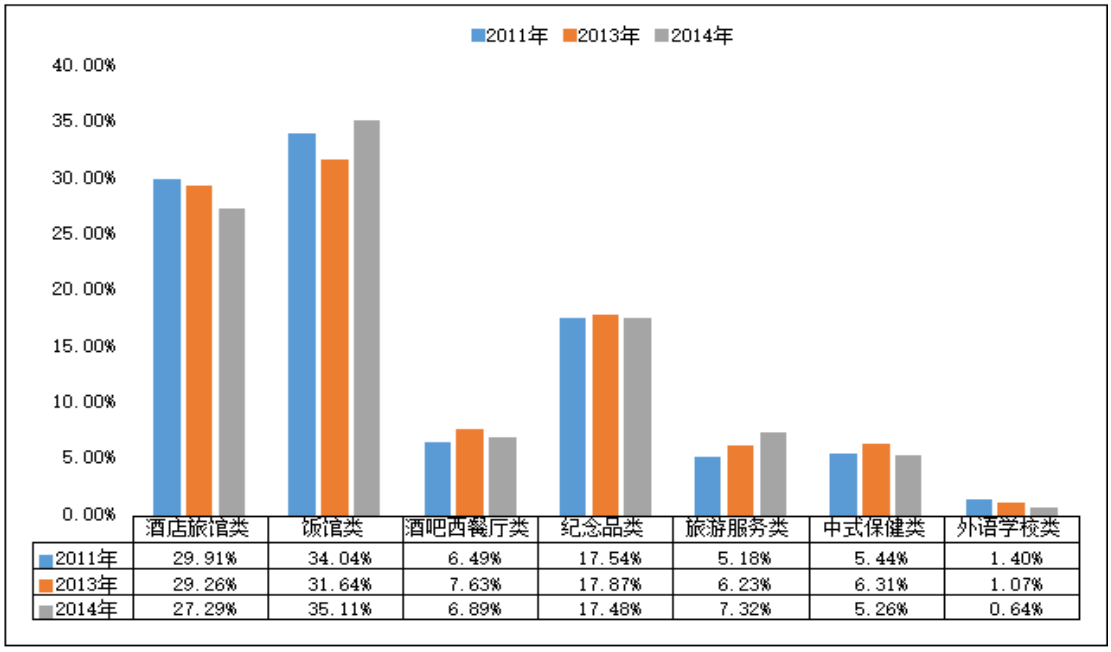
It is clear from Figure 6-11 that the proportion of the shops for residents increased from 32.55% in 2013 to 36.95%; the shops for tourists only dropped from 39.82% to 30.30%. From an overall perspective, the total number of tourism-related shops has dropped compared with that of 2013. The increase of tourism-related shops from 2011 to 2013 is mainly because that the increasing impact of tourism of Yangshuo pushed shops to change from serving residents to serving tourists. The decrease of the shops serving tourists only might be ascribed to the structured adjustment by shops themselves

in Yangshuo County under exacerbated competition in tourism commerce and it is partly because the shops serving tourists only change their forms to shops serving tourists and residents.

6.8.2.2. Business Types of Tourism Shops: Catering and Tourism Service Shops Increase

As the function of shops has undergone structured adjustments, the specific use of tourism-related shops has changed accordingly.

In the survey, the tourism-related shops are classified into six parts according to the business scope: hotels, restaurants, bars, western restaurants, souvenirs (handicraft, featured clothing, local specialty, etc.), and tourism consultation (travel agency and bike rental shop). Figure 6-12 is prepared in combination of the statistical data of 2011 to present the change of proportion of shop type. (For convenience, hotels and western restaurants are combined as one type as last year's)



	酒店旅馆类	饭馆类	酒吧西餐厅类	纪念品类	旅游服务类	中式保健类	外语学校类
2011年	29.91%	34.04%	6.49%	17.54%	5.18%	5.44%	1.40%
2013年	29.26%	31.64%	7.63%	17.87%	6.23%	6.31%	1.07%
2014年	27.29%	35.11%	6.89%	17.48%	7.32%	5.26%	0.64%

Figure 6-12 Proportions of different types of tourism shops in 2011, 2013 and 2014

Among the total six types of tourism-related shops, except from restaurants and tourism services, four of which has seen a slight decrease compared with that of 2013. However, bars, hotels, restaurants, and souvenirs still dominate, indicating that the overall demand for tourists remains the same while some structured adjustments occur in specific types of shops. The increase number of

restaurants is partly because of the increase of tourist number. However, compared with 2013, when the proportion of restaurants dropped dramatically, the increase of proportion in 2014 might be the result of relieved market pressure since the drop in 2013. And the increase number of tourism service shops might be the result of large number of individual tourists. Both hotels and restaurants are, to some extent, the mandatory requirements for tourists. However, although that the number of restaurants increase, the number of hotels decrease. Compared with the first half of 2014, it is hard to tell directly for the first half of 2014 has done pretty good in tourist number over the same period in 2013. The number of hotels and bars and western restaurants has seen a slight increase, with 27 new hotels and 5 new bars and restaurants. Both types of shops has become saturated. Because the number of streets and the total number of shops covered in the survey were increased dramatically, the proportion of hotels comparatively drops. Some souvenir shops, Chinese health care shops and foreign language schools exit the market due to fierce competition. Generally speaking, the structured change of the functions of tourism shops reflects the change of demand of tourists and the tourism modality.

6.8.2.3 Shop Location: Tourism Shops Centralizes to Tourism District

In the survey, the business street is divided into three areas according to the crowding level of tourists (as specified in the former section). The survey on the shops in three areas and the monitoring statistics in recent years are listed in Figure 6-13

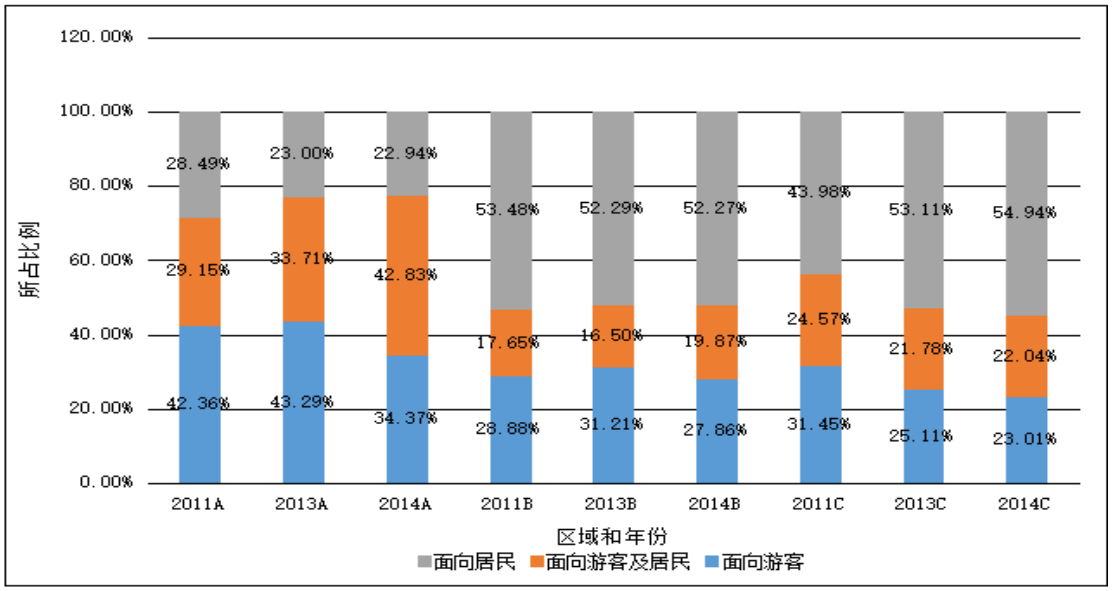


Figure 6-13 Comparison between the proportions of types of shops in all areas in 2011, 2013 and 2014

It is clear from Figure 6-13 that the proportions of shops for tourists only as well as for both tourists and residents in Area A is on the rise from 2011 to 2014, which indicates that Area, as the tourism district, still sees potential on commercialization level. On the contrary, the proportions of shops serving tourists as well as both tourists and residents in area C are reduced, while the proportion of shops serving residents is increased. The data indicates that the shops located in the tourism center and the places with large tourist flow tend to engage in tourism. Such change of business form is relative to the tour path as well the tourist activity area. It also indicates that tourists are still concentrated in Area A, such as West Street and other main tourism streets, and the peripheral business area fails to attract more tourists. As for Area B, the level of commercialization saw a slight increase in 2013 compared with 2011, while went totally flat in 2014. The proportions of shops serving tourists as well as both tourists and residents in Area C are reduced, which is related to the travel routes that tourists choose and their activity areas. It also indicates that tourists are still concentrated in area A, while the peripheral business area B and C fail to attract more tourists and shift to be more residents-oriented.

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

80 valid questionnaires from business owners were collected in the monitoring. The 5 major statistical indicators are company profile, business perception, local perception, energy-saving awareness and sustainable tourism development awareness of the owners.

6.8.3.1 Company Profile: Diversified Operation and More Lifestyle Businesses

According to the survey, tourists-oriented companies account for 72.7% of the total, residents-oriented companies account for 10.4% and 16.9% of companies serve both tourists and residents. Among those companies, accommodation service companies stand 43.9%, catering companies stand 25.8%, goods selling companies occupy 18.2%, and some other rental entertainment service companies are included. 39.4% of companies provide various tourism services, accomplishing diversification. As for the motives of business owners, most owners (68.7%) came to Yangshuo not

for making a living. Nearly 50% of owners (49.3%) love the environment of Yangshuo and are seeking for a different lifestyle. There are still a proportion of owners came here out of interest and for family's sake.

6.8.3.2 Business Perception: Current Situation of Operation Improved. Rents and Tourist Consumption Ability are Two Variances

The average score of owners to operation situation is 2.76 (1 stands for excellent, 2 stands for pretty good, 3 stands for acceptable, 4 stands for poor and 5 stands for intolerable) , which is above average. According to the survey, 58.9% of owners think their current operating state is just acceptable, 26.3% are satisfied with it and 10% are dissatisfied with it. Compared with last year (65.79%), the overall dissatisfaction decreased rapidly, indicating the improvement of Yangshuo's operation situation.

According to the survey findings from several indicators like "rent", "wage", "product cost", "other enterprise competition", "tourist consumption ability", "tax" and "policy" (see Figure 6-14), tourist consumption ability, rent, other enterprise competition and policy are the major factors affecting business operation, of which the tourist consumption ability and high rent are the biggest obstacles hindering business operation. In the field survey, the annual rents of the shops on West Street are as high as 400,000 to 50,000 Yuan, and the annual rents of some shops near West Street are more than 100,000 Yuan. Many owners complain that it is hard to bear such a heavy rent. These factors lowers the operation stability of Yangshuo enterprises. Of all respondents, the average business term is 4.2 years and fewer than half have a business term of more than 3 years, while the business term of the rest is around 1.5 year. This instability increases the owner's risk in setting up a shop and will certainly influence the sound development of the business.

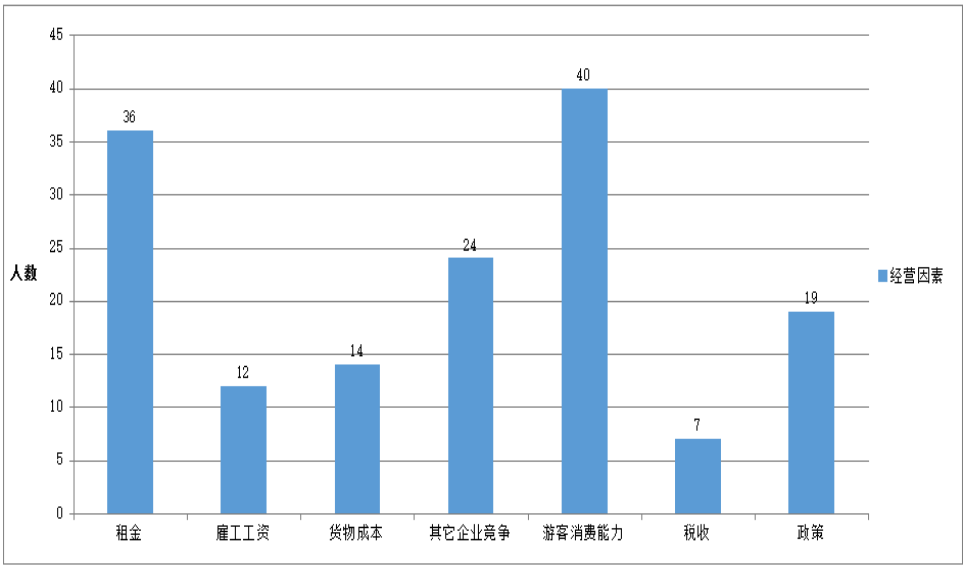


Figure 6-14 Factors deemed to affect the operating state by the owners

Compared with last year, the tourist consumption ability leapt into the most important factor that influence business operation. The consumption per capita per day increased from 388 Yuan in 2010 to 516 Yuan, while the prices were on the rise. Therefore basically the consuming ability didn't greatly improved. The group travels has been increasing constantly and the student tourist group, who have limited financial resources makes up the biggest part. Additionally, more focus should be lied upon the change of pattern of Yangshuo's tourism to attract high-end tourists through breaking out of the vicious circle of low price competition, improving the product quality and customized services.

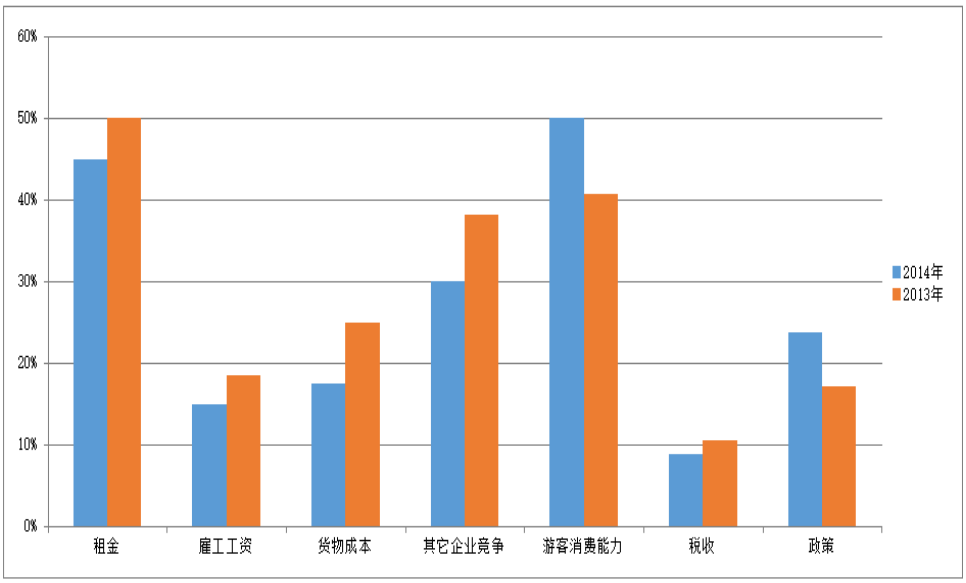


Figure 6-15 Factors deemed to affect the operating state by the owners: the contrast of 2013 and 2014

6.8.3.3 Environmental Perception: Most Owners are Contented with the Living and Investment Environment, but They Think West Street is Over-Commercialized

Six indicators, including "safety", "livability", "worth the investment or not", "leisure activity", "West Street commercialization" and "West Street attraction", are included in the questionnaires to evaluate the owner's perception of local living and investment. Statistically, the average satisfactions of "safety", "livability", "worth the investment or not", and "leisure activity" are close to 4, and in particular, the satisfaction of "livability" reaches as high as 4.3. This indicates the owners are generally satisfied with the living and investment environment of Yangshuo. In terms of the perception to West Street, the owners agree to certain extent that West Street is deeply commercialized (68.4% of owners think so) and 50% of owners agree West Street is less attractive to tourists.

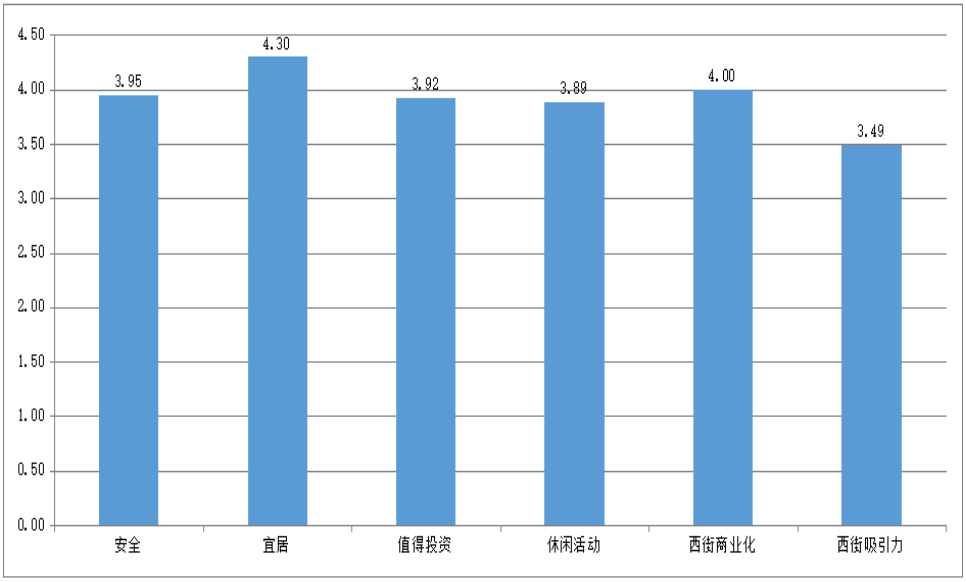


Figure 6-16 Local perceptions of the owners

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

For the question "Do you implement the energy-saving measure", only 32% of owners, including guesthouses, restaurants and hotels, implement the energy-saving measure. The types of enterprises that implement energy-saving measures increases compared with last year. Contrast to last year, the

number of enterprises that are unwilling to implement the energy-saving measures drops. This indicates that the energy saving awareness is raising, yet it is still a tiny fraction. Energy saving behavior has not been popularized.

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

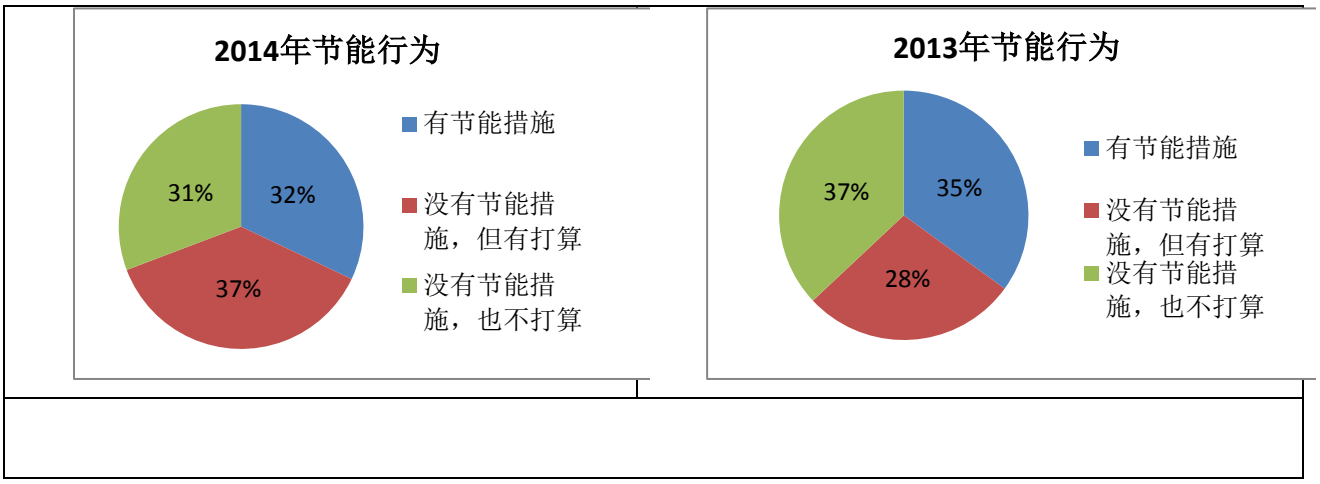


Figure 6-17 Owner’s selection of energy-saving behavior: a contrast of 2013 to 2014

6.8.3.4 Inadequate Owner Perception to Sustainable Tourism Development

As for the question “Do you know something about sustainable tourism development”, most owners “know a little” and only 12% of them are “very clear”, indicating that the perception of owners to sustainable tourism development needs to promote.

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

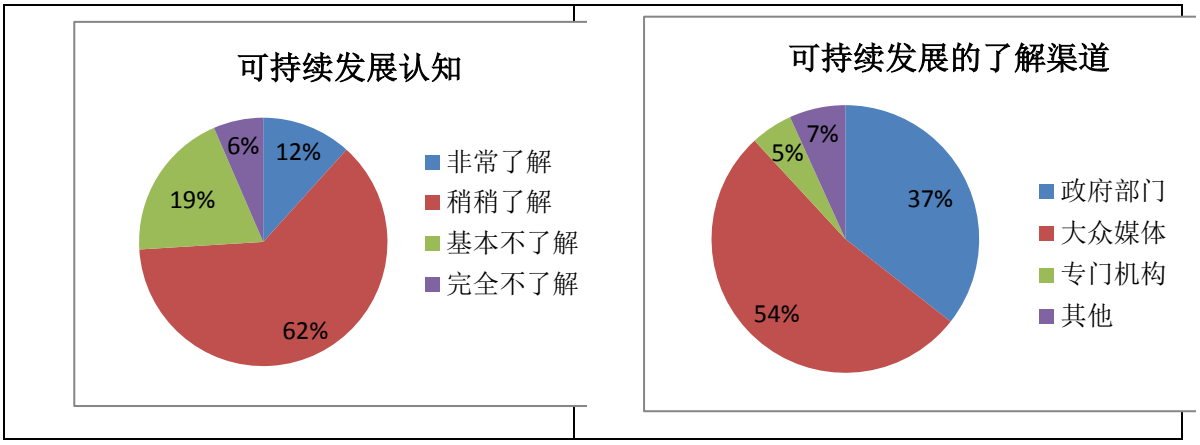


Figure 6-18 Owners' perception to sustainable tourism development and their information channels

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

Main indicators spreading job satisfaction, occupational choice, working ability and learning behavior are included in the total 179 valid questionnaires.

6.8.4.1 Job Satisfaction: the Overall Satisfaction is High, but the Working Treatment Needs to Improve

According to the survey result, the average satisfaction of employees with the current job is 3.87, higher than the neutral level (3) and close to the satisfaction level (4). 68% of employees are satisfied with their jobs. Generally speaking, the employees in Yangshuo are satisfied with their current jobs especially the employees working in scenery spots, yet the treatment needs to be improved.

In particular, 15 indicators, such as "wage", "bonus", "holidays", "promotion", "comment from the superior", "support from the superior", "colleague collaboration", "colleague exchange", "family support", "rules and regulations", "sector responsibilities", "operational condition", "objectives", "comfort" and "scenic environment", are included in the questionnaire to measure the employee satisfaction with his/her job. These 15 indicators can be classified into 4 dimensions: working treatment, interpersonal relationship, cognition and recognition of enterprises and work environment. According to the statistics shown in Table 6-5, the employees were most content with the work environment, followed by interpersonal relationship and the cognition of enterprises. However they were with least satisfaction with the working treatment.

Table 6-5 Average satisfactions of employees with each indicator

Impact dimension	Monitoring indicator	Average satisfaction	
Working treatment	Wage	3.28	3.28
	Bonus	3.22	
	Holidays	3.33	
	Promotion	3.29	
Interpersonal relationship	Comment form the superior	3.77	3.61
	Support from the superior	2.97	
	Colleague collaboration	3.07	
	Colleague exchange	4.17	
	Family support	3.28	
Recognition of enterprises	Rules and regulations	3.65	3.69
	Sector responsibilities	3.89	
	Operational condition	3.61	
	Objectives	3.6	
Work environment	Comfort	3.72	3.96
	Scenic environment	4.19	

As for working treatment, the satisfactions with wage, bonus, holidays and promotion are low. According to the survey, the wage of most employees (65.5%) engaging in tourism in Yangshuo ranges between 1001 and 2000 Yuan (Figure 6-19), which is basically the same with last year. These fit the characteristics of tourism enterprise: low wage, fewer holidays in the peak season and tight pyramid business structure. In terms of interpersonal relationship, the satisfaction of employees with colleague exchange is the highest, which is attributed to the high requirement of exchange and cooperation in offering tourism services. In addition, most employees gain support from their families, indicating the further recognition of tourism industry by more and more people. As for recognition of

enterprises, the scores of indicators are close. In the survey, many employees are not familiar with rules and regulations and objectives of enterprises, which might be due to the high mobility of employees. In terms of work environment, employees are most satisfied with the scenic environment. In the field survey, the scenic .environment become the main attraction to employees from other areas.

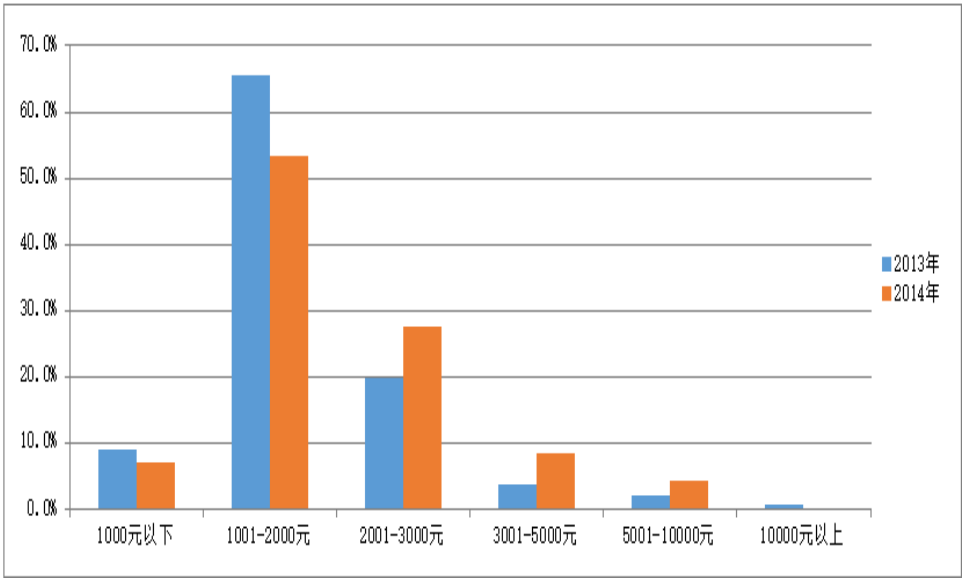


Figure 6-19 Employees' monthly income: a contrast of 2013 to 2014

6.8.4.2 Occupational Choice: Pursuit of Life Style and the Strong Will to Change a Job

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

Statistically, in terms of "reason to choose the job" and motive to get the job, 45% of employees like Yangshuo's comfortable environment and pursue a lifestyle, which fits the survey result that the satisfaction of employees with the work environment is the highest. However, the mobility of those who are willing to accept low wage for pursuit of a life style is high. According to the survey data, 36.6% of employees are willing to change their jobs, and most of them are planning to make a shift in about 1 year. This is not good for improving the overall service level of Yangshuo tourism. It also indicates that tourism not only creates jobs in Yangshuo, but also increases the employee mobility as well as the social employment instability.

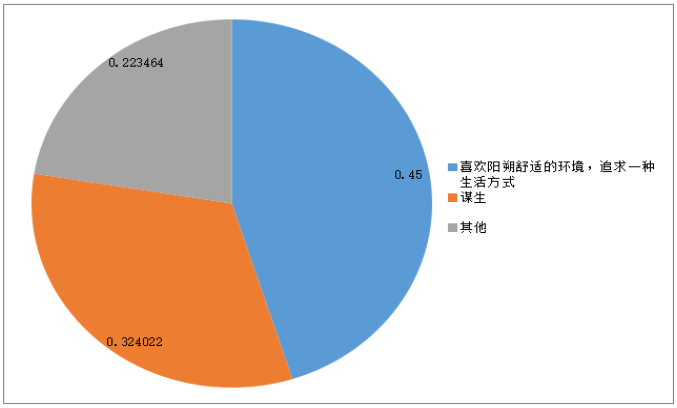


Figure 6-20 Reason to choose a job in Yangshuo

In terms of employment opportunity, 46.8% of employees think that the employment opportunities in Yangshuo are limited and 99.4% get the job on their own or by relatives and friends. The government and community provide little help in this regard. So, the government and the public service organizations shall expand the channel to provide more employment information to create more jobs.

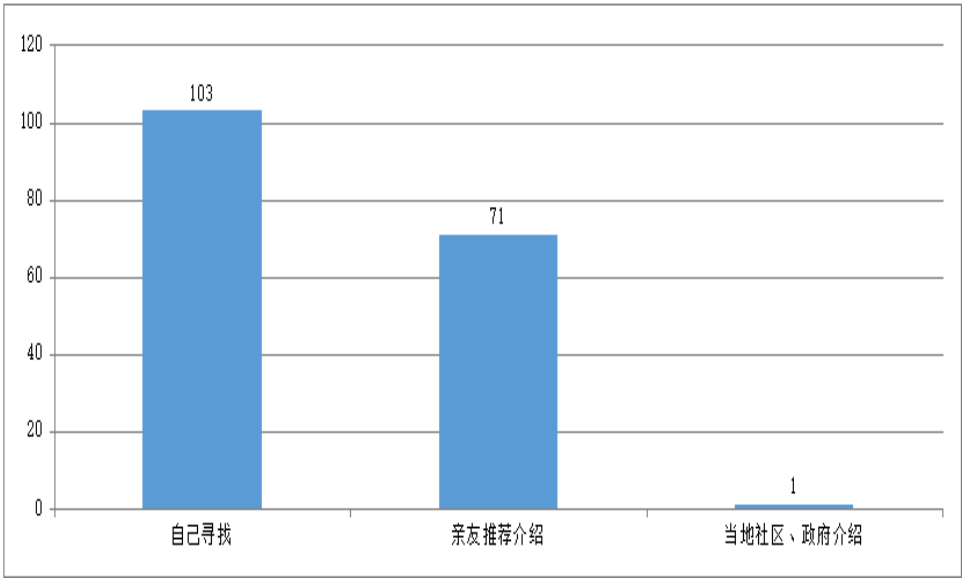


Figure 6-21 Channels to get a job

6.8.4.3 Working Ability and Learning Behavior: English Learning Ability but Limited Skills in Other Industries

The gender ratio in the investigation sample is 1:2.52, the age range is from 15 to 44, and the education background is above senior high school in general. In this investigation, employees who enjoy a bachelor's degree or above account for 28.8% of the total. Most employees (79%) have no other source of income. A minority of employees earn an extra income through tour guiding or

tourism goods selling. 72.9% employees only account for less than 50% of all household income while 17.7% employees burden the whole family. In general, the employees are younger with females account for the majority. Most employees are not the primary breadwinners of a household. Most employees enjoyed a secondary education and a minority received a higher education.

Table 6-6 Average satisfactions of employees with each indicator

Age		Education
15-24	42.4%	Primary school 5.1%
25-44	53.7%	Junior high school 16.5%
45-64	3.9%	Senior high school or technical secondary school 50%
Above 65	0	Undergraduate or junior college 26.1%
		Above postgraduate 2.3%

According to the analysis, most employees are females and most received a secondary education, which limits the work ability. Due to the low threshold and education requirement, tourism industry offers more opportunities for those people. Moreover, English become a compulsory skill for tourism workers for the overflowing Chinese and Western cultural atmosphere and the large number of tourists in Yangshuo. Of all the respondents, 45.7% have the English learning habit and 40% can communicate in English, and only 20.9% know very little about English. Yangshuo, as a tiny county based largely on agriculture, its employees in tourism industry enjoy a high level of English skills due to the impact of tourism.

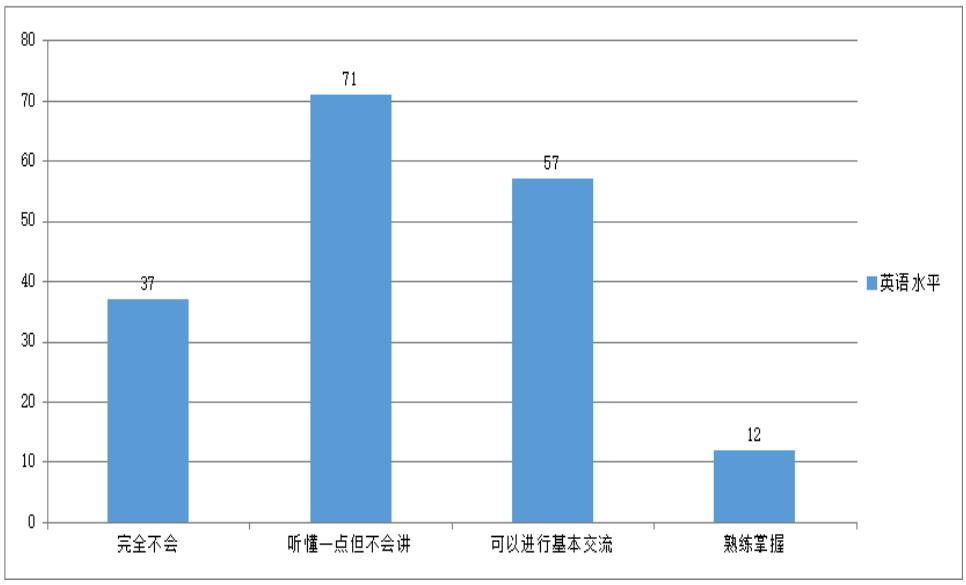


Figure 6-22 English level of employees

6.9 Summary of the Chapter

6.9.1 Tourism Vigorously Promote the Overall Economic Development of Yangshuo

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

6.9.2 Tourism Further Drives Investment

In 2013, Yangshuo County steadily promoted the construction of "Guangxi Famous Tourism County with Unique Features" to attract more high-end tourism projects and funds. 4 new projects like each with an investment of over100 million Yuan "Relais & Châteaux", "Yangshuo Hongshang Shengjing Tourism and Health Industrial Project" and "Singapore Design Studio Leisure World" were introduced and 1.5 billion Yuan domestic funds as well as 31 million USD foreign funds were attracted, which indicated the investment indicators have reached a record high. In the first half of

2014, Yangshuo County carried out 5 new key projects and continued to work on 5 other projects, which indicates the strengthened driving roll of tourism.

6.9.3 Tourism Plays a Prominent Role in the Industry Pulling and Restructuring of Yangshuo

Large-scale development in tourism emphasizes the industry-pulling effect. Tourism further restructures the proportion of three major industries, and the effect on the secondary industry is particularly evident. The proportion of secondary industry increased 5% in 2013 compared with that of 2008 and the proportion of the primary industry decreased.

Yangshuo, as an agricultural county, the abundant agricultural commodities play an important role in tourism specialty. Moreover, tourism offers huge job opportunities and accelerates the transfer of labor force from the primary industry to the tertiary industry. In the meanwhile, tourism promotes the work skills of residents, bolstering the related education and training industry. In terms of industry, the role of tourism played in commerce promotion is particularly prominent. There is an obvious incremental rise on the number of tourism-related shops compared with last year.

6.9.4 Tourism Promotes the Commerce Restructuring

According to the function change of shops in 2014 compared with 2011, the number of shops serving residents only and tourists and residents increased from 2011 to 2013, while apparently declined in 2014, which shows a self-restructuring process in commerce according to the changing conditions. Of the six types of tourism-related shops, in spite of the rise on the proportion on restaurants and tourism services, the rest are on a decline, which reflects that the tourism modality changes according to the conditions of tourism market and the demand of tourists.

6.9.5 Diversified Operations of Small Tourism Enterprises: Business Owners' and Employees' Satisfaction from Current Conditions

Small tourism enterprises in Yangshuo stick to diversified operations and lifestyle businesses are more prevalent. As for business perception, the operation conditions of small enterprises has improved. Rents and tourism consuming ability remain the major factors in business operation. In terms of small business owners are satisfied with the living and investment environment of Yangshuo,

yet are dissatisfied with the high commercialization of West Street. In the case of energy–saving, the awareness of small business owners is raising, yet few actions have been taken. Moreover, most small business owners have limited perception to tourism sustainable development, which needs to raise. The employees are satisfied with their work in general, yet seek for a better work treatment. Due to the impact of tourism, the English skills of the employees are comparatively high. The mobility of workers is high as the employees are seeking for a lifestyle.

Chapter VII Tourism and Resources Environmental Protection

7.1 Monitoring Indicators of Tourism and Resources Environmental Protection

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

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

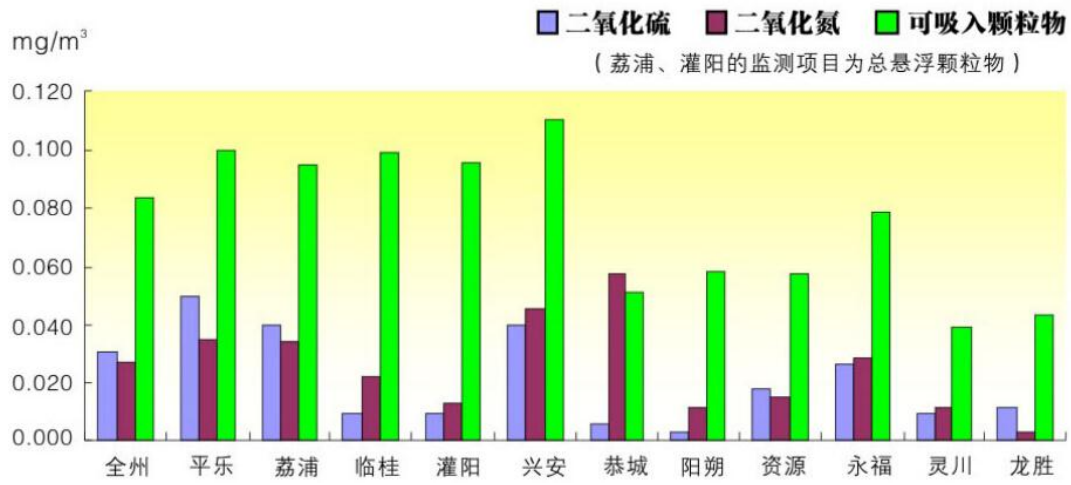
7.2 Atmospheric Environment

7.2.1 Improved Air Quality

Yangshuo effectively reduced its pollutant discharge through cyclic economy, cleaner production, restructuring industrial and energy structures, and closing the enterprises causing heavy pollutions. The air quality of Yangshuo is increasingly stable and has seen a slight increase compared with last year. According to the *Environment Bulletin of Yangshuo County 2013*, the average annual values of sulfur dioxide, nitrogen dioxide, and total suspended particulates contained in the ambient air of Yangshuo County in 2013 meet the national secondary city standard. The contents of sulfur dioxide and inhalable particles in the ambient air of Yangshuo County in 2013 drop obviously. The air quality is improved, and the major pollution factor is particle matters (see Figure 7-2).

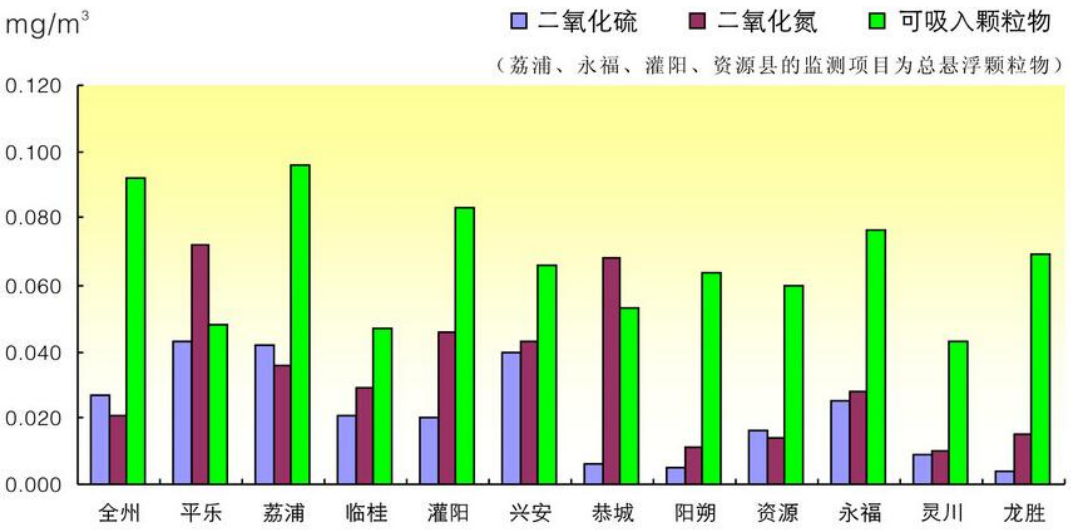
Table 7-2 Monitoring result of air quality in Yangshuo County in 2013

Item / **Concentration**	**Sulfur dioxide (SO_2)**	**Nitrogen dioxide (NO_2)**	**Particle matter (PM_{10})**
Annual average	0.007	0.011	0.058
Secondary standard	0.060	0.040	0.100
Compliance result	Pass	Pass	Pass



(Source: *Environment Bulletin of Guilin City 2013*)

Figure 7-1 Air quality of all counties in Guilin City in 2013



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

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

7.2.2 Perception: Better Resident Perception and Tourist Perception

The resident perception to Yangshuo's air pollution caused by tourism is shown in Figure 7-3. Of all respondent residents, 41% and 17.3% agree and strongly agree that tourism has aggregated air pollution; 21.2% think that tourism has no bearing on air pollution; 15% and 5.6% disagree and strongly disagree on that point;.

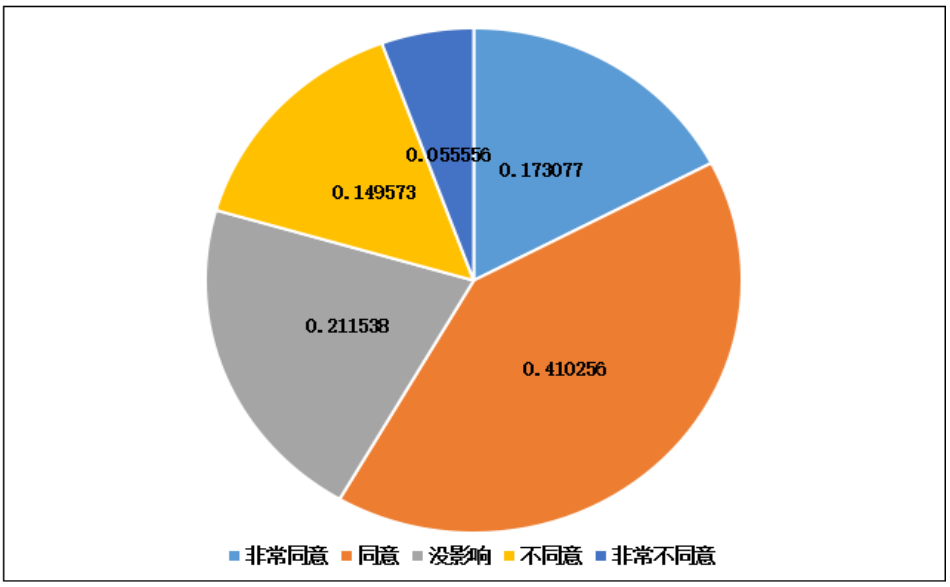
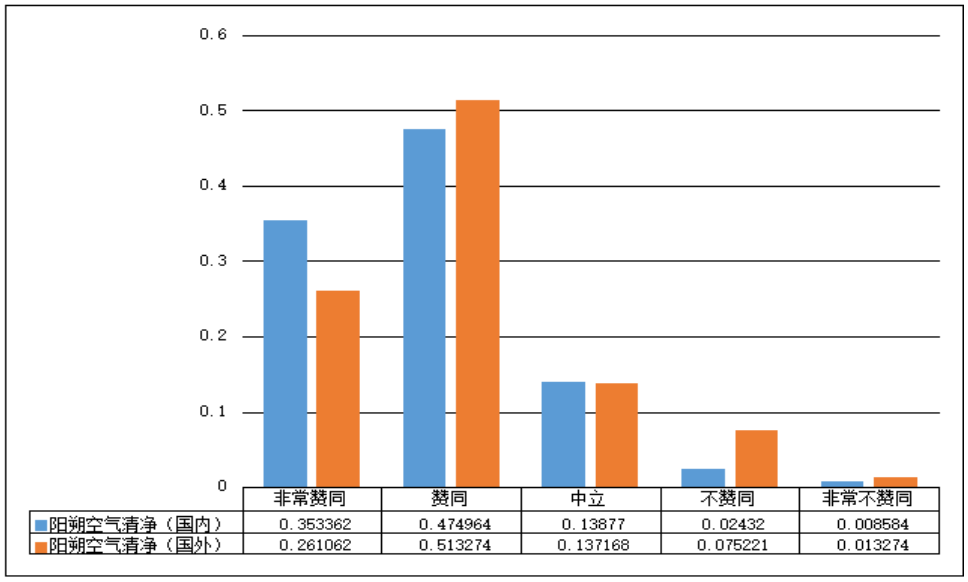


Figure 7-3 Tourism has aggregated air pollution

As for tourists, according to Figure 7-4, most of the tourists, at home and abroad, appreciated the air cleanliness of Yangshuo. 82.8% of domestic tourists and 77.4% of foreign tourists (which is somewhat lower) agree and strongly agree the air is clean. The discrepancy exists in “strongly agree”. 35.3% of domestic tourists and 26.1% of foreign tourists strongly agree, which has something to do with living environment. Nearly 14% of both domestic tourists and foreign tourists remain neutral, and 3.3% of domestic tourists and 8.8% of foreign tourists disagree and strongly disagree on that point.



	非常赞同	赞同	中立	不赞同	非常不赞同
阳朔空气清净（国内）	0.353362	0.474964	0.13877	0.02432	0.008584
阳朔空气清净（国外）	0.261062	0.513274	0.137168	0.075221	0.013274

Figure 7-4 Air cleanliness of Yangshuo

Generally speaking, the resident perception to Yangshuo air is better and 82.8% residents agree the air there is good, indicating Yangshuo County has had a great deal of success in dealing with air pollution; however, many tourists agree and strong agree that the air in Yangshuo is clean, which shows discrepancy between the perception of residents and tourists. The reason of this is that Yangshuo residents attach great importance to their living environment and are sensitive to the change of the local environment. And the tourists, who live there for a short time, only see part of Yangshuo and compare what they see with their cities. Thus, a large gap of perception exists between domestic and foreign tourists.

7.3 Water Resource Environment

7.3.1 Water Resource Utilization and Conservation

According to the *2014 Government Work Report of Yangshuo County*, Yangshuo invests 33 million Yuan on Xingping River realignment, construction of Aotou River Way on the left bank of Lijiang River in city district, and the management work of hydrological waterways story. Yangshuo should complete the dam safety improvement work of 9 small and medium reservoirs, including Jiuda, Shunmei and Hongqi. It also works to harness small and medium rivers and advances the irrigation and water conservancy in winter and spring, improving the anti-disaster capability. Yangshuo provides drinking water to 150,000 rural residents in original basis. The investment on water conservancy fixed assets totaled 103 million Yuan. It has also added 23.4 km of anti-seepage canal and completed 62 drinking water safety projects in rural areas, providing drinking water to 31,000 rural residents. The main works of reinforcement projects for 16 small-sized reservoirs have been completed. The 2013 Water Special Project for Small Farmers at county-level has been going smoothly and the Central Water Special Project for Small Farmers has passed the acceptance check by Guilin City.

7.3.2 Perception: Residents Feel Worse While Tourists Feel Good about Water Quality

As shown in Figure 7-5: as for residents, 18.4% of the respondent residents strongly agree that tourism development has exacerbated the local water pollution; and 44.3% agree on that point. 19.1% think that tourism development has no bearing on water pollution. 13.9% and 4.3% of them disagree and strongly disagree on that point.

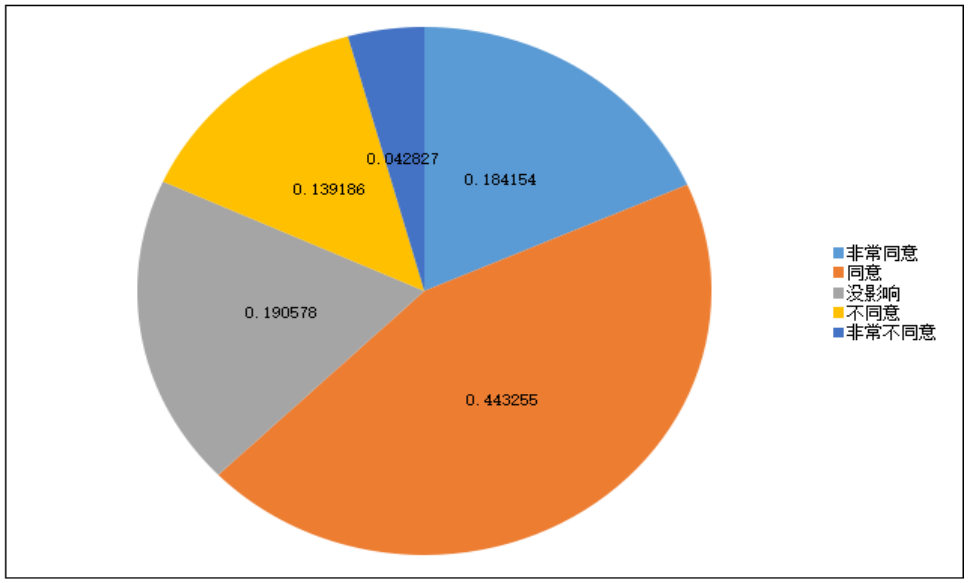


Figure 7-5 Tourism has aggregated water pollution

As for tourists, the domestic and foreign tourists hold different perceptions to the water quality of Lijiang River. 20% of domestic tourists and 9% of foreign tourists strongly agree that the water quality is good, while the percentages of domestic and foreign tourists who agree on that point are 30% and 18% respectively, which shows the lowering degree of recognition of tourists over water quality. 36.5% of domestic tourists and 46.2% of foreign tourists remain neutral. 11% of domestic tourists and 19% of foreign tourists disagree on that point while 2.6% of domestic tourists and 7.2% foreign tourists are strongly disagree on that point.

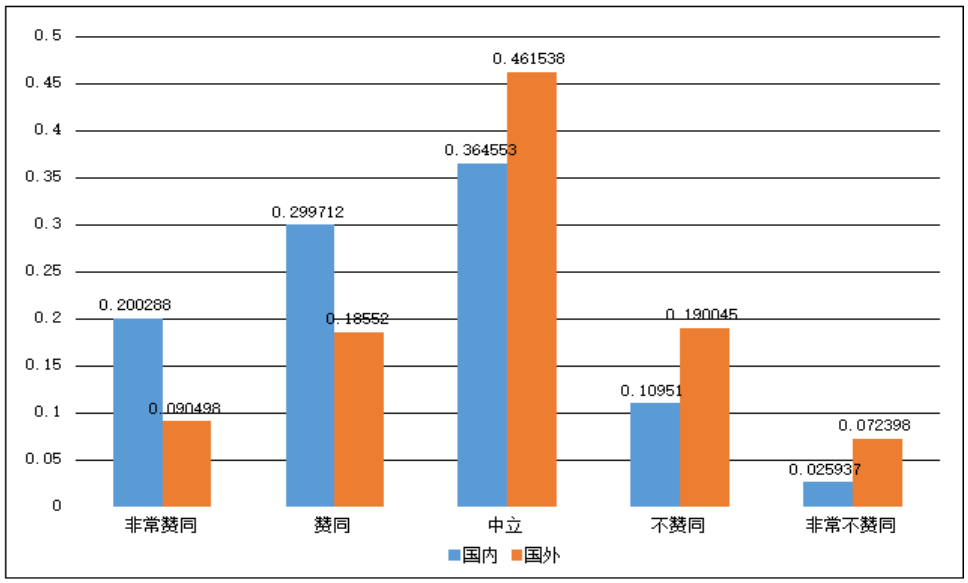


Figure 7-6 Good water quality of Lijiang River

Generally speaking, both residents and tourists perceive that the water quality gets worse. The overall perceptions of domestic and foreign tourists to the water quality of Lijiang River shows a large discrepancy. According to Figures 7-5 and 7-6, the number of domestic tourists choosing Agree is more than that of foreign tourists, while the number of foreign tourists choosing Disagree is more than that of domestic tourists. This indicates that the perception to water varies with different geographical environment, and that more efforts need to be made to improve and maintain the water quality as the water, in fact, is not in good quality. Residents who get in touch with the local water body for a long time, are more sensitive to the change of quality, and the tourists, who live there for a short time, know less about the water body in Yangshuo and see the water quality in their place of residence as a sole reference standard.

7.4 Noise Environment

7.4.1 State Quo of the Noise Environment

According to the *Environment Bulletin of Guilin City 2013* 91.7% of the monitoring areas meet the noise standard. Statistics are shown in Figure 7-3:

Table 7-3 Monitoring of noise control spots in Yangshuo County (2013)

Standard zone	Sources of noise	Living （business）	Transport ation	Industry

In Yangshuo County（206 round-the-clock monitoring spots		Day	Night	Day	Night	Day	Night
	Total number	92	92	11	11	0	0
	Number that meets standard	87	87	8	7	0	0
	Number that exceeds allowable limit	5	5	3	4	0	0
	Proportion of spots that meet standard（%）			91.7			

7.4.2 Perception: Serious Noise Pollution in West Street

As for the residents, 21.6% and 47% of respondent residents strongly agree and agree that tourism has aggregated noise pollution, while 16% hold that tourism has nothing to do with noise pollution. 13% and 2.4% disagree and strongly disagree on that point.

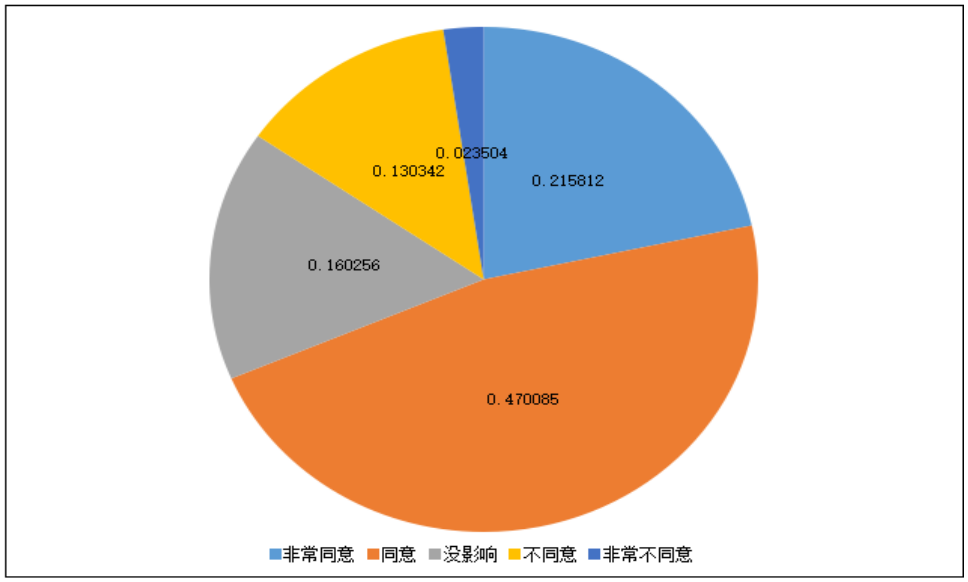


Figure 7-7 Worse noise pollution caused by tourism

As for tourists, 17.4% of domestic tourists and 10.7% of foreign tourists strongly agree the noise in Yangshuo is low. However, 11.8% of domestic tourists and 21.3% of foreign tourists strongly

disagree on that point. The percentages of domestic and foreign tourists choosing Agree are 34.1% and 29.3% while 32.1% of domestic tourists and 26.7% of foreign tourists remain neutral. Those choosing Disagree are 4.6% and 12% respectively.

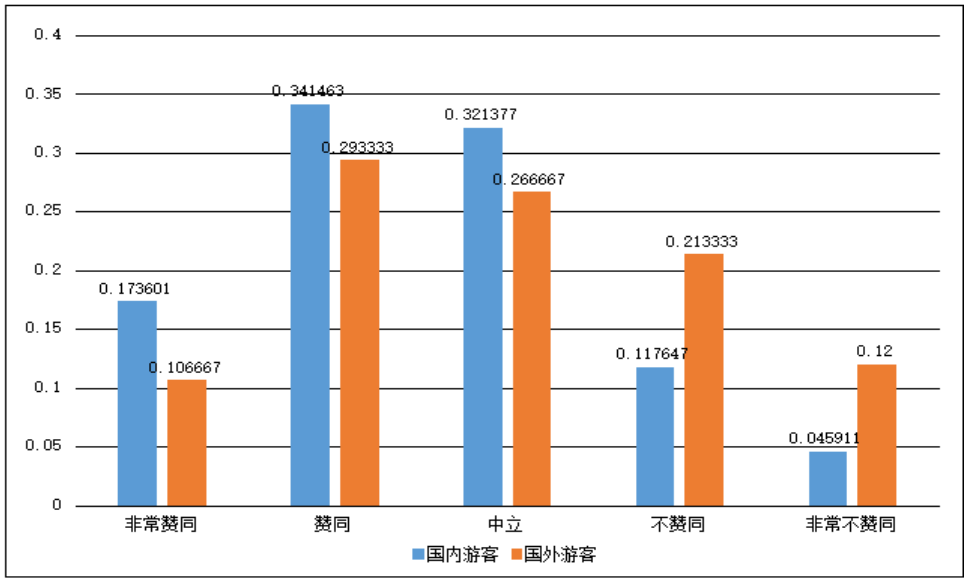


Figure 7-8 Low noise in Yangshuo

Generally speaking, more than 60% of residents think that the noise in Yangshuo is strong. Some respondent residents, most of whom live in West Street hold that the noise brought by tourism development has disturbed their lives. Domestic and foreign tourists hold different perceptions to noise. In general, the perception of domestic tourists is not apparent, while 30% of foreign tourists disagree that the noise is low in Yangshuo because they mainly live in the hotels near West Street and are affected by shouts of street vendors, sound of radios and noises of bars.

7.5 Solid Waste

7.5.1 The Disposal Rate of Solid Waste Increases

During 2014, more than 30 million Yuan were invested in constructing the main part of a waterworks in New Town and installing over 2000-meter external main pipe network; 15 million Yuan were invested in building sewage plant in New Town. The construction of sewage plant and road net saw great a breakthrough. The construction of four main roads—Shanshui Avenue (northern part), Lansheng Road, Lanxi Road and

Zhaoxia Road were divided into 7 bid sections and went on concurrently. 1,500,000 square meters surface cleaning of road, 210,000 cubic meters roadbed earthwork construction, 1,200 mu surface cleaning in the areas of return or resettlement, and 200 mu surface cleaning in Xingfu Garden were completed in 2014. What's more, the preliminary design and expert evaluation of 6 main and secondary main roads that will be constructed in the second phase have been finished and all the construction projects in New Town have been proceeding as planned. "Beautiful Yangshuo and Clean Urban and Rural Areas" project, with an investment of 240 million Yuan was in full swing, gradually increasing the facilities of cleaning and travel collection, removal as well as disposal in rural areas, effectively improving the environment and enhancing the public's environmental awareness.

7.5.2 Perception: Residents Perceive Increase of Solid Wastes and Tourists Sense Degradation in Environment

As shown in Figure 7-9, 52.2% and 20.1% of respondent residents agrees and strongly agrees that tourism has increased solid wastes, 14.8% hold tourism has nothing to do with solid wastes, while 10.5% and 2.4% disagrees and strongly disagrees that tourism has increased solid wastes.

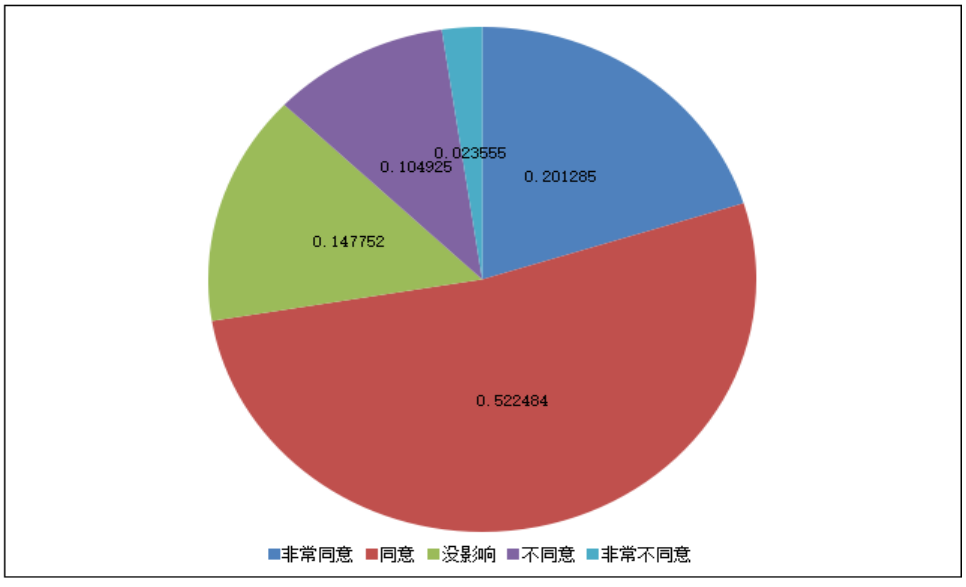


Figure 7-9 Tourism increases solid wastes

As for tourists, 20.8% of domestic tourists and 17.3% of foreign tourists strongly agrees that the environment of scenic spots is clean and 46.3% of domestic tourists and 39.8% of foreign tourists agrees on the point. 24.1% of domestic tourists and 24.8% of foreign tourists remaines neutral in this regard, while 7.6% of domestic tourists and 14.6% of foreign tourists disagrees. The percentages of domestic and foreign tourists choosing Strongly Disagree are 1.3% and 3.5% respectively.

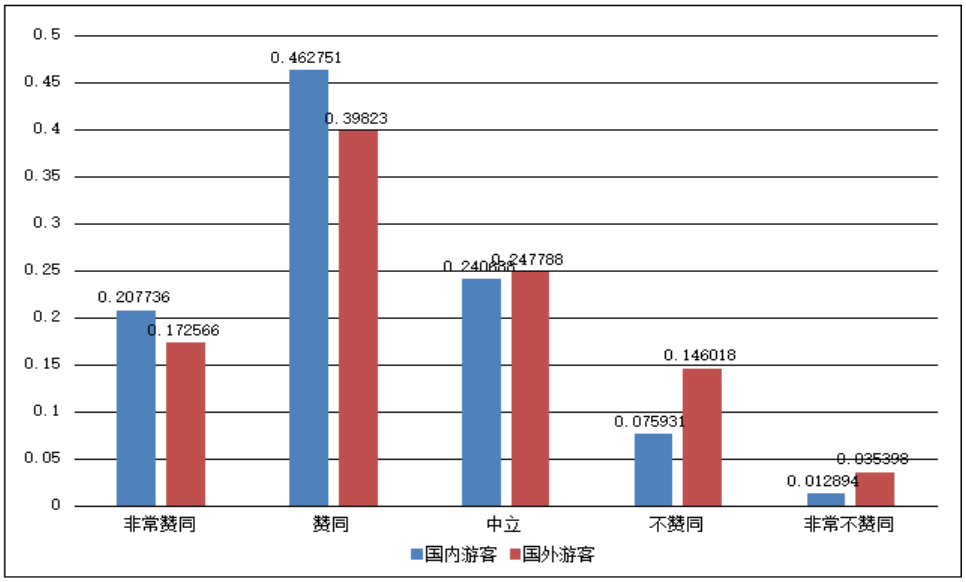


Figure 7-10 Environment of scenic spots is clean

Generally, most of the respondent residents agree that tourism development has increased solid wastes. Yearly increasing of tourists would lead to more household wastes in all aspects, such as food, clothing, housing and transportation. If such wastes haven't been timely disposed, they will throw a negative impact on both the scenic spot management and tourist's travelling experience. As for tourists, most tourists are satisfied with the sanitation of the environment. However, compared with the statistics of last year, the statistics of this year shows that tourist satisfaction has declined. Besides, a few tourists report that some local environment needs to be improved and some tourist's throwing trash everywhere indeed disturbs other tourists.

7.6 Landscape Maintenance and Visual Impact

7.6.1 Measures Adopted to Improve Landscape

In 2014, Government of Yangshuo County printed and distributed *Notice on Prohibiting Illegal Land Grapping for House Building* and *Notice on Cracking Down on Illegal Land Use and Illegal Construction*, stopped and investigated a number of illegal practices like unapproved mountain cutting, land use and construction, as well as demolished more than 125 illegal buildings (with the gross area of 13,300 square meters) around Ten-mile Gallery, along Yulong River and near the intersection of Muqiao Road of Yipu Village. 13 million Yuan were invested in controlling 48 overhanging rocks at Bilian Peak, Longtou Mountain and etc. A joint law enforcement team was established to strengthen specific programs on controlling illegal construction and demolishing illegal buildings. According to "Zero Tolerance and Zero Compensation" principle, the team focused on cleaning up illegal building around the county and Ten-mile Gallery, along Yulong River and near scenic spots, and at the same time ensure "zero increase, full demolition and no turning back" of illegal buildings so as to achieve a long-term effective management mechanism.

7.6.2 Perception: Residents' Landscape Maintenance Awareness Increases and Tourists Have Good Environment Impression

For residents, 33.8% of respondents hold that hotels and other tourism facilities have no impact on landscape aesthetics, and 27.6% and 13% agree and strongly agree that hotels and other tourism facilities have ruined landscape aesthetics, while those who disagree and strongly disagree account for 22% and 3.6% respectively.

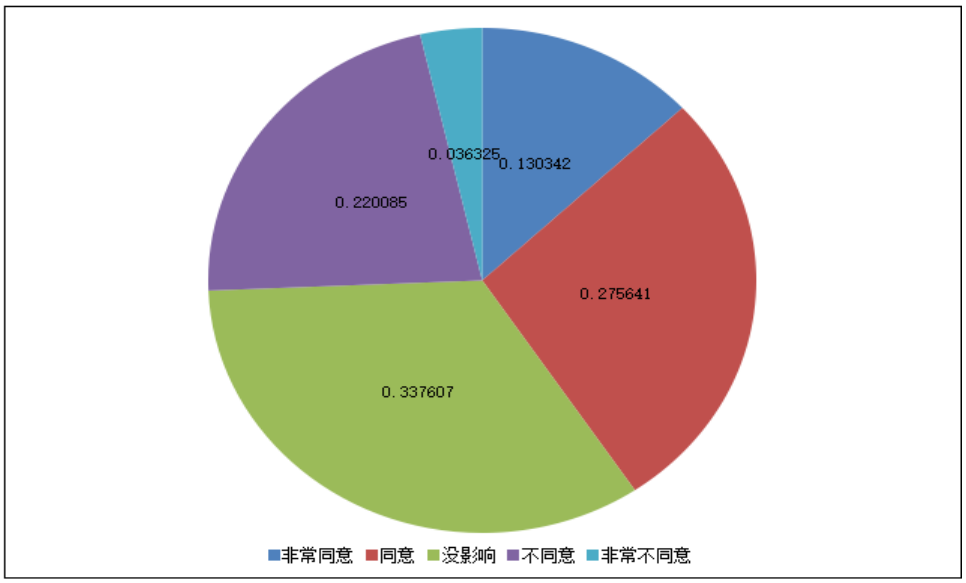


Figure 7-11 Hotels and other tourism facilities ruin landscape aesthetics

From the perspective of tourists, 39% and 22.4% of domestic tourists agree and strongly agree that the cultural attractions are properly maintained, 30.3% remain neutral, while 7.4% and 0.9% disagree and strongly disagree. As for foreign tourists, the percentages of choosing Strongly Agree, Agree, Neutral, Disagree and Strongly Disagree are 17.2%, 33.5%, 33.9%, 11.8% and 3.6% respectively.

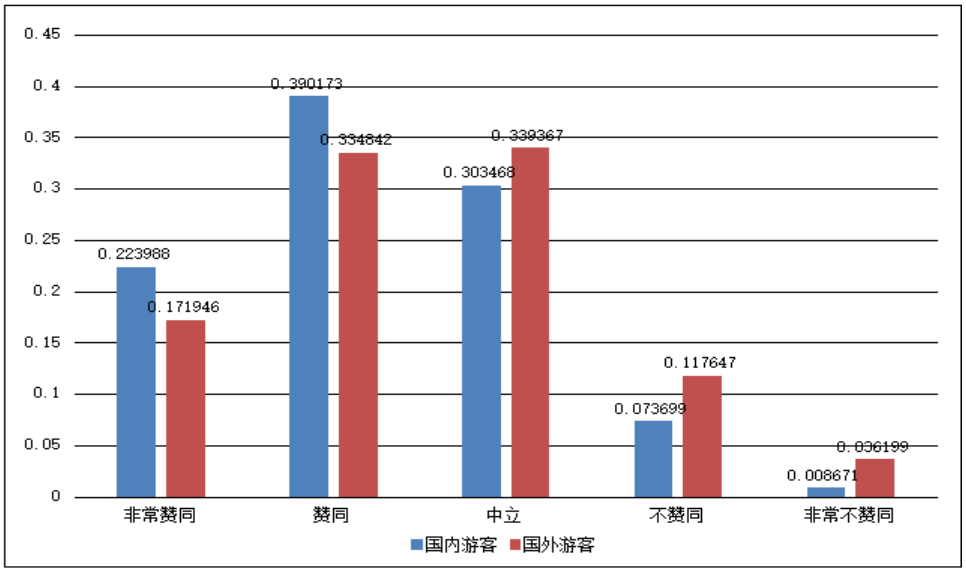


Figure 7-12 Cultural attractions are properly maintained

In terms of the resident perception, most residents don't think that hotels and other tourism facilities have ruined the landscape aesthetics. On the contrary, they consider that those facilities as buildings can bring them economic benefits. Residents are not aware of

the importance of landscape protection, but compared with the statistics of previous years, residents' perception has increased and their sense of maintaining landscape has been improved. However, great efforts should still be put to maintain the landscape in Yangshuo. As for tourists, both domestic and foreign tourists perceive that the cultural attractions are properly maintained, but much more foreign tourists disagree on the point, indicating that more efforts are needed to maintain cultural attractions.

7.7 Energy-saving Management

Way back in 2011, Yangshuo County had invested 29.88 million Yuan in completing 83 rural power grid transformation projects in 63 natural villages of 9 towns, improving the power supply quality of electric network. In terms of energy conservation, Yangshuo County government promoted the use of clean energy in tourism enterprises and encouraged them to adopt energy-saving measures.

In this round of monitoring, the team randomly surveyed and interviewed the owners of different types of tourism enterprises in Yangshuo County, and recovered 81 valid questionnaires. The results of the questionnaires (Figure 7-13) shows 32.9% of the enterprises have taken measures to save energies and water, and measures includes using energy-saving lamp, saving water intentionally (such as using water within limited time and controlling power supply), using solar electrical appliance, LED light, etc. 31.6% of the enterprises have not taken any measures yet but intended to, while 35.4% have not nor intended to take any measures of which two main causes are: first, enterprise owners want to save operating cost. Installing energy-efficient appliances will add short-term operating cost though it proves beneficial in the long run ; and second, they don't know the approaches and measures of energy saving.

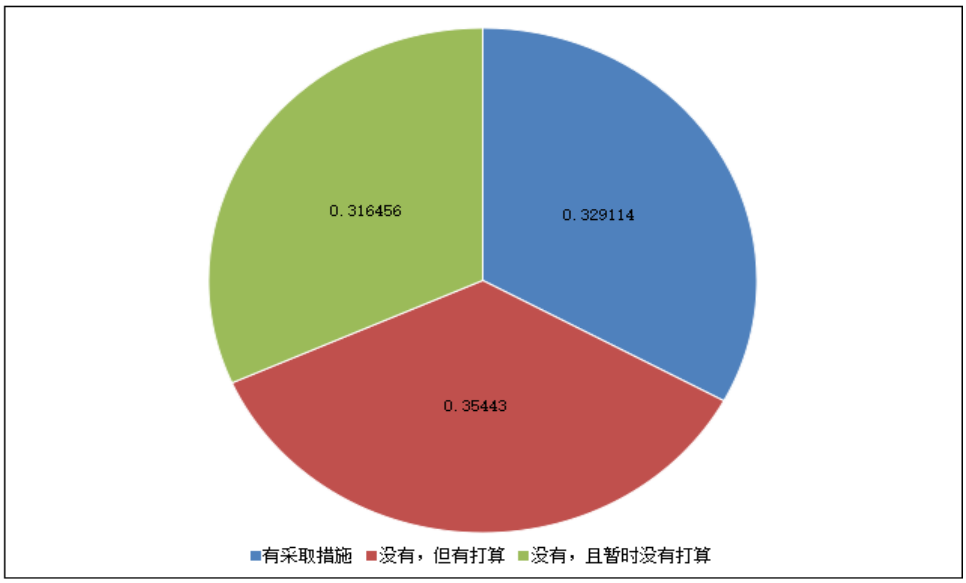


Figure 7-13 Proportion of enterprises, by energy-saving measures

7.8 Summary of the Chapter

Overall, the tourism resource and environmental protection in Yangshuo are relatively satisfying. The government has done a great job in protecting environment and resources. Related policies and plans introduced by the government have promoted the environmental protection and achieved favorable results. For atmospheric and aquatic environment, residents' perception to atmosphere and water has enjoyed a slight increase, and they could feel the local changes. As for noise control, both tourists and residents feel that their lives or travelling are disturbed by strong noise especially in West Street. In terms of solid waste, residents perceive that the increase of tourists every year has caused great damage to the environment of scenic spots. Besides, tourists also sense degradation in environment, indicating that environment protection in scenic spots should be strengthened. With regard to landscape, both resident and tourist perception have been improved thanks to police implemented by the government. As for energy management, due to limited fund and knowledge, energy-saving measures in some enterprises have not been fully implemented and some enterprises haven't realized the importance of energy-saving. To solve these problems, the following measures shall be taken:

7.8.1 Protecting the Environment

The sustainable development of Yangshuo requires protection in atmospheric and aquatic environment. As Yangshuo's tourism relies on mountains and rivers, improvement of aquatic environment can not only promise local residents a favorable living environment, but a primary task for the sustainable development of Yangshuo.

7.8.2 Controlling the Noise

The noise intensity is too high in West Street. At night, shouts of street vendors, sound of radios and music from bars took West Street by storm seriously disturb the surrounding residents and tourists, and lower tourists' satisfaction, which is going against the development of West Street. Therefore, it is necessary to control the sources of those key noises.

7.8.3 Keeping the Environment Clean

Sharp increase in the number of tourists bears directly upon the environment as more wastes will be produced by tourists. Therefore, it is incumbent upon everyone to care about the environment of scenic spots when developing tourism industry.

7.8.4 Maintaining the Landscape

Landscape maintenance and its vision effect is part of the sustainable development of tourism. The resident awareness on environmental protection has been improved but still should be further improved. While maintaining the natural landscape, we should also pay more attention to the protection of traditional culture and customs which are also important components of landscape.

7.8.5 Saving Energy and Cutting Emissions

Some enterprises still know little about the importance of energy. Therefore, government should step up publicity and encourage them to save energy and cut emissions. At the same time, the government should help small enterprises through subsidies so as to realize energy management and sustainable development.

Chapter VIII Tourism Products and Services

Investigation and analysis on the supply and demand of tourism products and services are not only the basic requirements for improving tourists' satisfaction and speeding tourism but also the keys to the sustainable tourism development in Yangshuo. The monitoring was carried out to investigate tourism products and services in Yangshuo through questionnaire and record observation. For one thing, questionnaires were delivered to tourists to collect information like their touring motive and line, through which to know about the demand of tourism market. For another, record observation was conducted to investigate the supply of tourism service so as to have a clear understanding on the competence in providing tourism service and potentiality of tourism development.

8.1 Monitoring Indicators of Tourism Products and Services

In this part, the development of the tourism products and services in Yangshuo are reflected through the types of tourism products and services as well as the image of tourism destination. The monitoring indicators are designed according to the *Indicators of Sustainable Development for Tourism Destinations*. See Table 8-1.

Table 8-1 Monitoring indicators of tourism products and services

Main monitoring aspect	Monitoring indicator
Tourists' expectation to tourism products	Purpose of travel
	Expected length of stay
Tourists' choices of tourism products	Shops attracting tourists
	Consumption of tourism products
	Tourist choice of tourism attractions
The scope of tourism services	Types of the basic tourism service facilities at the tourism destinations

	Distribution of tourism service facilities
Destination image/tourist's response to tourism products	Channels to get the destination information
	Destination information expected by tourists
	Willingness of revisiting
	Willingness to recommend Yangshuo to others

Based on the indicators above, the survey team distributed questionnaires and carried out a field survey, succeeding in collecting the primary data. And under the assistance of the relevant local administrative departments, some secondary data as the supplementary and supporting information were also collected. With the data and information obtained, the team analyzed the questions related to tourism products and services and concludes the characteristics of tourist expectation, tourism products, tourism service facilities and destination image, enabling to monitor the sustainable development of the tourism products and services at the tourism destination.

8.2 Tourist Purchase Characteristics

The following two questions in the monitoring questionnaire: "What is your purpose to come to Yangshuo?" and "How long do you plan to stay in Yangshuo?" mainly reflect the expected characteristics before the tourists' spending. Analysis and explanation will be given on the basis of the date collected from the questionnaire and the information got through field observations and interviews.

8.2.1.1 Traveling Purpose: Mainly for Sightseeing and Leisure

Traveling purpose reflects, to some extent, the tourist expectations to tourist destinations. Understanding tourist expectations and spending motivations is an important prerequisite to understand market demand and segmentation. The survey team has recovered 714 valid

questionnaires from domestic tourists (87.07 of the total questionnaires) and 227 from foreign tourists (81.07 of the total questionnaires). The questionnaire results of tourists' purpose to come to Yangshuo are analyzed in Table 8-2 and Figure 8-1 (multiple choices, optional for the tourists to select multiple traveling purposes).

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

Traveling purpose	Domestic tourists			Foreign tourists		
	Percentage	Sorting[4]	**Change of sorting[5]**	Percentage	Sorting	**Change of sorting**
Sightseeing	62.5%	2	-1	74.4%	1	0
Leisure & vacation	63.7%	1	1	37.9%	2	0
Business events	2.0%	9	-1	3.5%	8	0
Official meetings and survey	1.8%	10	-1	1.3%	9	4
Incentive travel of the company and unit	3.8%	6	-1	0.9%	11	0

1. Note: It is sorted from 1 to 13 based on the proportion of the tourists selecting this item in the table, and larger the proportion is, the closer the sorting near to the top is.

2. Compared the sorting in 2013, + indicates up in sorting in 2014, - indicates down and 0 indicates that the sorting remained unchanged in 2014.

Religious worship	0.3%	13	0	0.0%	13	-1
Scientific expedition	1.4%	11	0	0.4%	12	-1
Wild adventure	2.7%	8	-2	31.3%	4	0
Photography	10.8%	4	0	21.1%	5	0
Family & friend visiting	3.8%	6	1	6.2%	7	-1
Festival activities	1.1%	12	0	0.9%	10	-2
Knowing about culture and cuisine	11.9%	3	0	35.7%	3	0
Others	8.5%	5	5	8.8%	6	1

Statistics in Table 8-2 show that compared with the statistics in 2013, the sorting of traveling purposes saw little changes this year. For tourists, no matter domestic or foreign, sightseeing and leisure & vacation are their main traveling purposes. 63.7% of domestic tourists choose sightseeing as their purpose, 62.5% choose leisure &vacation and the percentages of foreign tourists are 74.4% and 37.9% respectively, thus it can be seen that Yangshuo is still a popular tourist destination for sightseeing and leisure purposes.

For domestic tourists, apart from sightseeing and leisure & vacation, other purposes account for little. Cuisine and photography contribute 11.9% and 10.87%, still far less than the proportions of sightseeing and leisure & vacation. Other purposes added up together occupy a percentage under 10%. As for foreign tourists, 35.7% intend to know about culture and cuisine while 21.1% come to

Yangshuo for photography, which not only showes that foreign tourists are interested in Chinese culture and landscape scenery but also indicates that there is a great potential for the transformation of domestic tourism market and more emphasis should be put to develop local cultural characteristics and improve service on culture and photography. What's more, wild adventure is also a significant purpose for foreign tourists, with a percentage of 31.3%, indicating a great prospect of new tourism products in Yangshuo.

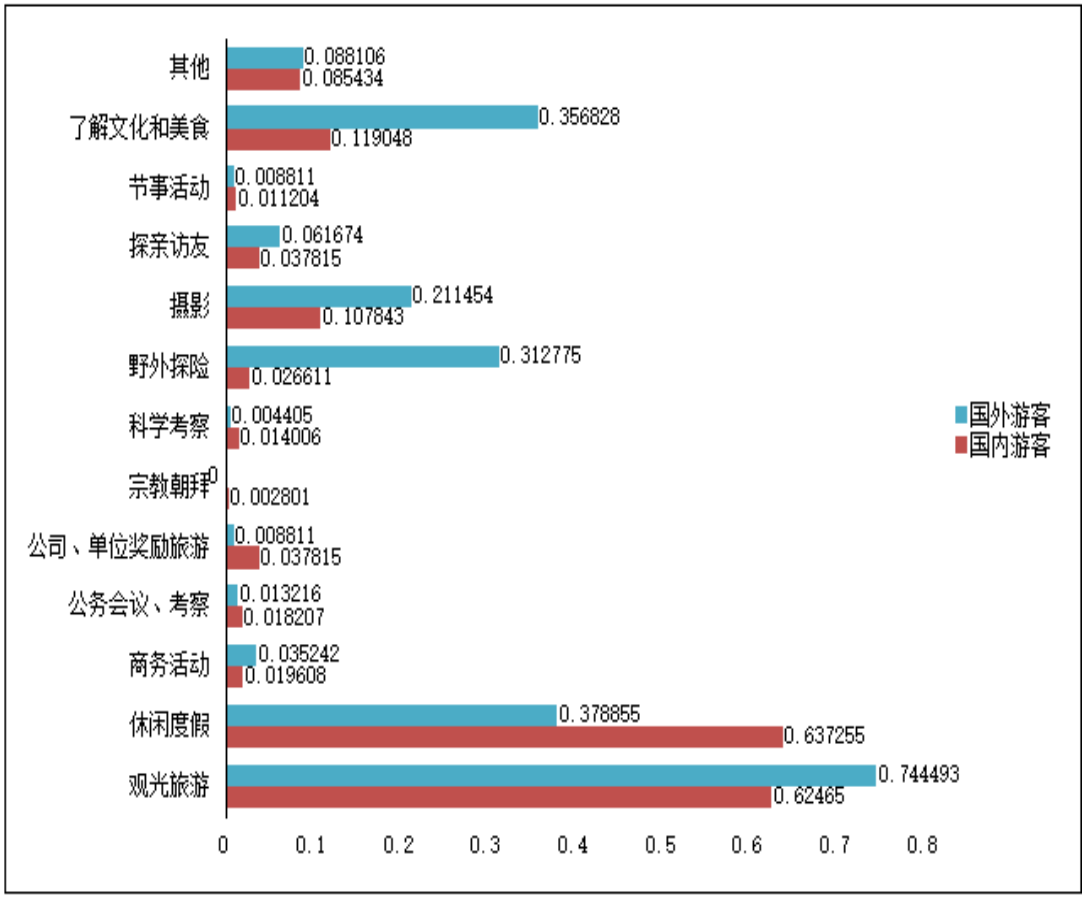


Figure 8-1 Comparison of traveling purposes between domestic and foreign tourists

As shown in Figure 8-1, in 2014, sightseeing and leisure & vacation are the most important purposes for both domestic and foreign tourists, but big differences still exist. For example, the proportion of "sightseeing" for foreign tourists is significantly higher than that of domestic tourists, while the proportion of "Leisure & vacation" is opposite, which indicates that mountains and rivers in Yangshuo are more attractive for foreign tourists. In addition, foreign and domestic tourists also differe greatly in "wild adventure", with 31.3% of foreign tourists coming for adventure but only 2.7%

of domestic tourists for the same purpose, mainly due to different awareness and acceptance of new tourism products. 31.3% of foreign tourists coming to Yangshuo for wild adventure, indicating that Yangshuo also enjoy the competence and potential in adventure tourism products. Therefore, the government should improve the service in wild adventure so as to forester and excite the interest of domestic tourists in this regard. Differences in traveling purpose between domestic and foreign tourists will affect their choice of tourism products and services, thus more diversified tourism products are required to meet the various needs of tourists with different tourism purposes.

8.2.1.2 Expected Length of Stay: Short term in General but Longer Staying for Foreign Tourists

Expected length of stay in Yangshuo reflects, to some extent, the overall tourist perception of tourism products and services in Yangshuo. "Generally, richer the activities are, longer the tourists will stay". Longer stay indicates that tourists are satisfied with the tourism products and services. On the basis of the questionnaire results, comparison of the length of stay in Yangshuo between domestic and foreign tourists is presented in Figure 8-2.

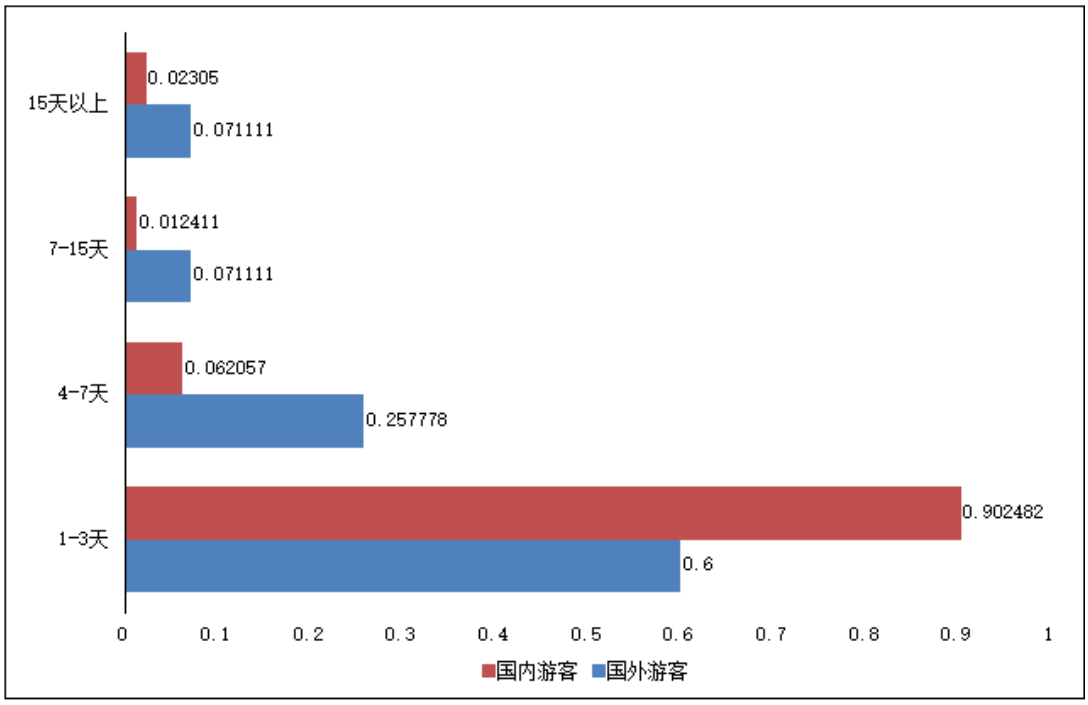


Figure 8-2 Length of stay in Yangshuo

It can be seen from Figure 8-2 that both domestic and foreign tourists prefer a shorter stay, with 90.2% of domestic tourists and 60.0% of foreign tourists staying only for 1-3 day(s), which is

certainly related to their travelling purpose as sightseeing with fewer alternatives in tourism product and service will lead to shorter stay in local attractions. Short-stay is more obvious for domestic tourists, primarily because among the domestic tourists, many join in fast-paced tour group and some from neighboring cities don't need to stay for a long time. In 2013, about 76.7% of domestic tourists stayed for 1-3 day(s), while in 2014, the percentage increased to 90.2%, which has an important bearing on the accessibility of high-speed train service in Guilin. Since the late December of 2013, Guilin have had available high-speed rails to cities within Guangxin Province like Nanning, Liuzhou, Beihai and cities around China like Changsha and Beijing, facilitating the transportation and accelerating tourists' traveling pace.

Compared with domestic tourists, foreign tourists stay longer, which may have something to do with activities during traveling. Among foreign tourists, many come to Yangshuo for the purpose of enjoying delicious foods and experiencing Chinese and Yangshuo culture (culture-experiencing activities included learning Chinese and Chinese Kungfu). All those purposes cannot be met in a shorter time but through further insight into local culture and life. Different traveling motivations require different tourism products and activities, thus causing differences in the length of stay between domestic and foreign tourists. It is thus clear before providing tourism products and services, we should pay attention to the various demands of different group and it is also obvious that tourism products and their functions have a significant effect on the stay time of tourists.

8.3 Tourism Products

Monitoring indicators of tourism products are mainly reflected by "Tourist route" (i.e. tourist attractions to choose), "Shops attracting tourists", and "Tourism commodities". On the basis of the questionnaire results and related data, the survey team conducted statistical analysis on the three monitoring indicators.

8.3.1 Tourist Choice of Attractions: West Street and Lijiang River Remain Must-sees

Main attractions in Yangshuo County include Yangshuo West Street, Moon Hill, Li Village, Yulong River, Peach Resort, Totem Ancient Trail, Big Banyan Tree Scenic Area, Impression on

Sister Liu, Longjing River, Xingping Fishing Village, Lijiang River, Ten-mile Gallery, Mushan Village and East Street. The survey team selected the following 13 well-developed scenic spots as targets to study the tourists' choice of attractions (multiple choices, optional for the tourists to choose the attractions).

Table 8-3 Tourists' preference on the attractions

Tourist attractions	Domestic tourists		Foreign tourists	
	Percentage	Sorting	Percentage	Sorting
West Street	88.4%	1	71.4%	2
Lijiang River drifting	64.6%	2	82.4%	1
Huangbu reflection on the back of 20 Yuan note	36.3%	5	39.6%	4
Qing'e Ferries	6.7%	13	2.6%	12
Butterfly Spring	24.9%	7	5.7%	11
Totem Ancient Trail	23.0%	8	1.8%	13
Jianshan Temple	7.8%	11	1.8%	13
Big Banyan Tree	39.4%	4	17.2%	7

Yulong River	43.8%	3	37.4%	5
Moon Hill	30.4%	6	44.5%	3
Longjing River rafting	14.3%	9	19.4%	6
Yang Di scenic spot	12.2%	10	12.8%	8
Fuli Ancient Town	5.2%	14	10.6%	9
Others	7.3%	12	9.7%	10

It can be seen from Table 8-3 that West Street and Lijiang River are the two most popular attractions. 88.4% of domestic tourists and 71.4% of foreign tourists will visit West Street, and 64.6 % of domestic tourists and 82.4% of foreign tourists will go to Lijiang River. West Street is the most popular attraction for domestic tourists while Lijiang River is the most popular one for foreign tourists, showing that West Street and Lijiang River, two core scenic spots in Yangshuo, their development and capacity have reached the top level of Yangshuo. However, West Street, also known as Foreigners' Street is the most popular attraction for domestic tourists but for foreign tourists, which indicates that it is no more a place preferred by foreigners but a commercial street attracting floods of domestic tourists.

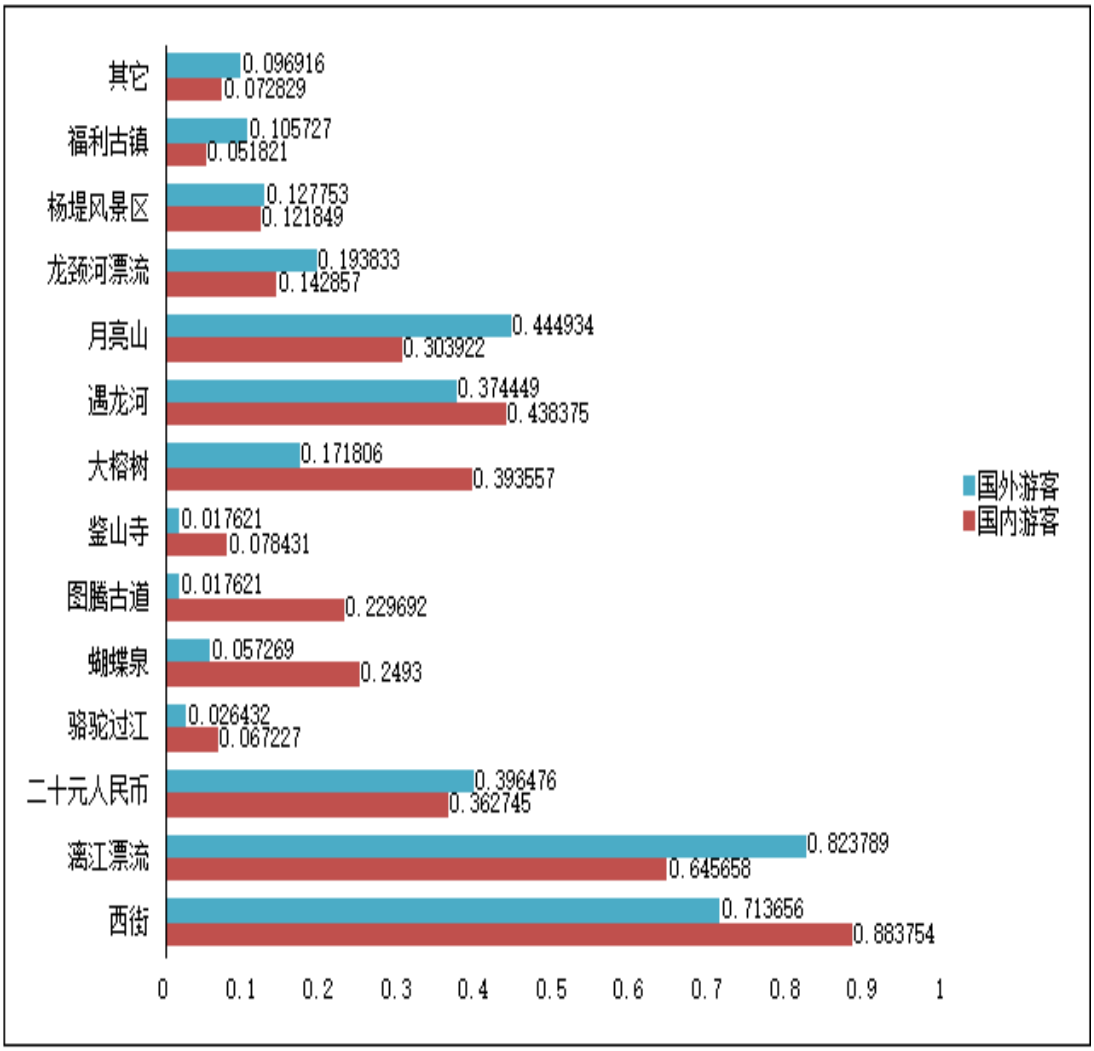


Figure 8-3 Choice of the attractions by domestic and foreign tourists

As shown in Figure 8-3, there exist big differences between domestic and foreign tourists in their choice of scenic spots, for example, Butterfly Spring, Totem Ancient Trail, Big Banyan Tree and Jianshan Temple are places with large number of domestic tourists but attracting few foreign tourists, especially Big Banyan Tree and Jianshan Temple. Through observation and interviews, it is found that those attractions are visited mainly by group tourists who are arranged to visit by travel agencies and it is also found that attractions attracting many foreign tourists such as Fuli Ancient Town and Moon Hill Folk, all boast of strong local characteristics. Moreover, based on the information from observation and interviews, other attractions preferred by foreign tourists include Jiu County, places for rock climbing and Yinshui rock.

In summary, West Street and Lijiang River, the landmark attractions of Yangshuo are still very attractive to the tourists both at home and abroad. Some public attractions artificially created and

constructed, like Totem Ancient Trail, Butterfly Spring, Jianshan Temple and Big Banyan Tree attracts more domestic tourists while foreign tourists are more inclined to attractions with fewer public tourists, but with folk culture or meeting special traveling demand.

8.2.2.1 Shops Attracting Tourists: Bars and Handicraft Shops Are the Most Popular, Foreign Tourists Prefer Chinese Restaurant

Knowing which shops attracting more tourists helps to understand tourists' interest and demand. The attractiveness of shops also reflects, to some extent, local shops' state of development, which plays a certain role in positioning tourist destination among different tourist groups, and contributes to balanced and diversified development of local business (multiple choices, optional for the tourists to choose multiple types of the shops which they are interested in).

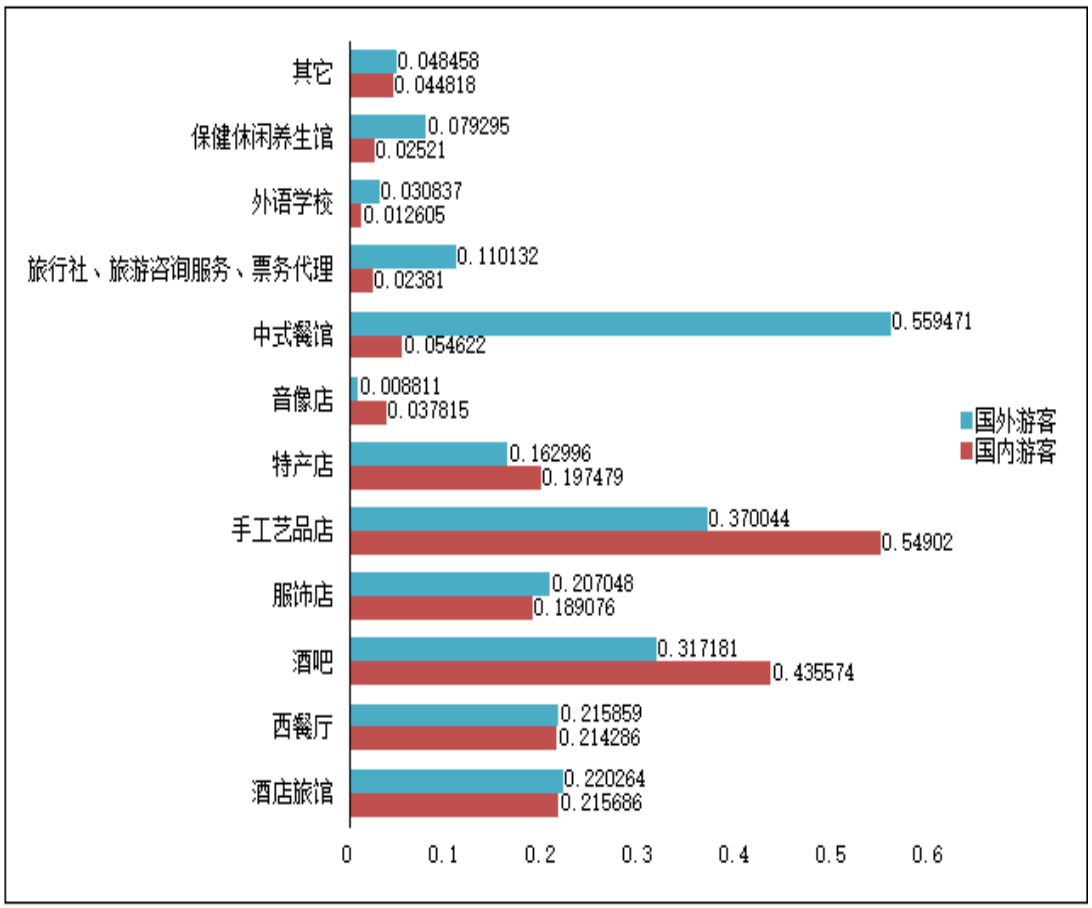


Figure 8-4 Types of shops attracting domestic and foreign tourists

As shown in Figure 8-4, handicraft shops, bars, hotels & guesthouses and western restaurants are the most attractive shops for domestic tourists, attracting 54.9%, 43.6%, 21.6%, and 21.4% of them respectively, while the statistics of hotels & guesthouses and western restaurants in 2013 are only 18.5%

and 16.7%, , indicating increasing attractiveness of these two shop types. As for foreign tourists, Chinese restaurants, handicraft shops, and bars are the most attractive, attracting 55.9%, 37.0% and 31.7% of the respondents respectively. Compared with 29.1% in 2013, the percentage of tourists who chose handicraft shop saw a sharp rise in 2014. There are differences in the shops that attracted foreign tourists and domestic tourists, among which those with biggest difference are Chinese restaurants, handicraft shops and bars. Chinese restaurant is much more attractive to foreign tourists while handicraft shops and bars more appeal to domestic tourists.

Overall, bars and handcraft shops remain the most attractive shop types in Yangshuo. However, more attention should be paid to the differences and changes of tourists' interest and demand, and to the development of the shops satisfying the needs of different tourists so as to maintain balanced and diversified.

8.3.3 Tourist Commodities: Handcrafts and Special Food Dominate the Market

Tourists' consumption on local tourist commodities is one of important indicators to evaluate local products and services. During this monitoring, tourists' consumption on local tourist commodities is analyzed by investigating the commodity type purchased by tourists and their purchase reason (multiple choices, optional for the tourists to choose purchased commodity types and why they purchased).

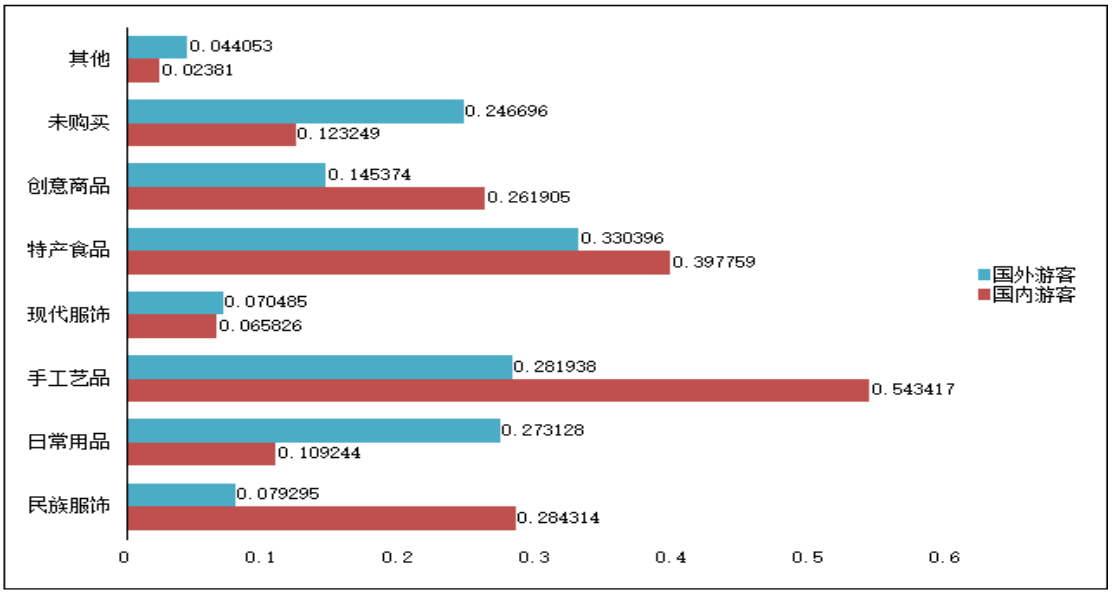


Figure 8-5 Tourist commodities bought by domestic and foreign tourists

It can be seen from Figure 8-5 that handcrafts, special food and ethnic costumes are the top 3 biggest-selling by domestic tourists while specialty food, handcrafts and daily items are the top 3 for foreign tourists. This is quite consistent with the shop type that attracts tourists, which indicates that when tourists are attracted by the shops, they are also attracted by the commodities in the shops and spend money on those commodities.

Compared with foreign tourists, domestic tourists spend much money on handcrafts and ethnic costumes, while foreign tourists pay more attention to "eating". What's more, foreign tourists consume more daily items, which may have something to do with their longer stay. Besides, ethnic costumes is more attractive to domestic tourists, of which a possible reason is that domestic tourists have a stronger sense of nationality and ethnic costumes with ethnic characteristics can meet their demands on ethnic culture.

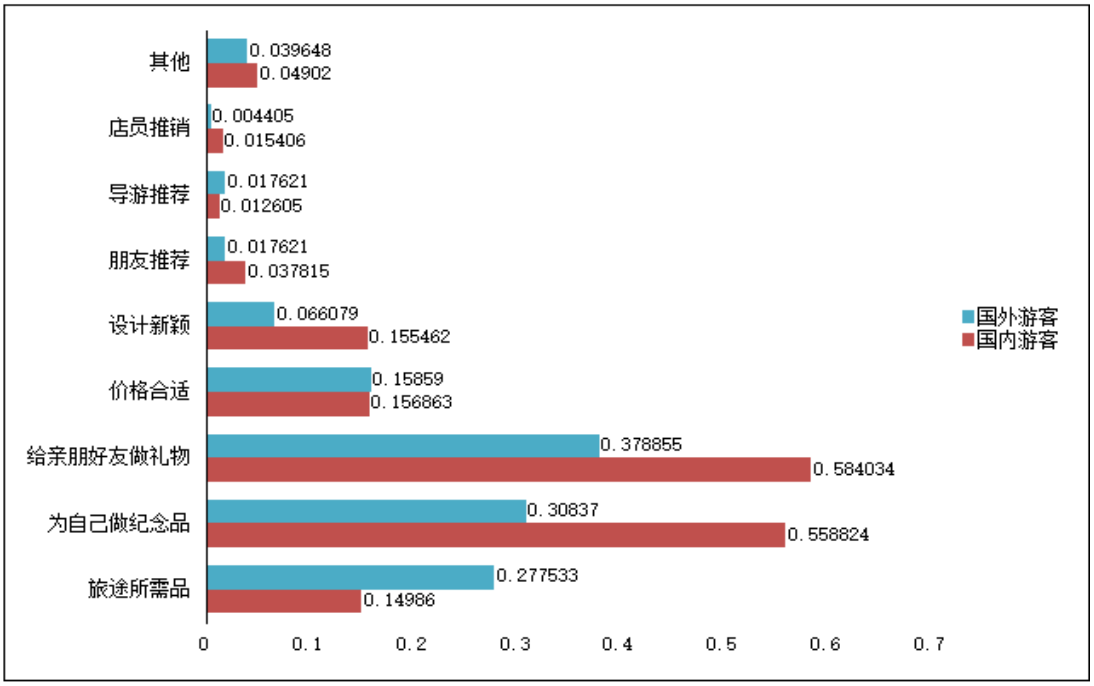


Figure 8-6 Reasons for domestic and foreign tourists buy tourist commodities

It can be seen from Figure 8-6 that both domestic and foreign tourists buy commodities mainly as gifts to their friends and families, followed by souvenirs for themselves, which is related to the nature of handicrafts and special food. For domestic tourists, 58.4% of them buy commodities as gifts and 55.9% as souvenirs, and the percentage of foreign tourists buying commodities as gifts and souvenirs reach 37.9% and 30.8% respectively. Travelling needs, proper price and original design are

common reasons for tourists' buying commodities too. Travelling needs is a significant reason for foreign tourists to buy commodities, which is consistent with their buying daily items.

8.4 Tourism Service Scope

Monitoring indicators of tourism service primarily are "Basic tourism service facility type in tourist destination" and "Hardware distribution in tourist destination". To this end, the survey team was divided into three groups to conduct a half-day on-site investigation in three areas to collect first-hand data.

Investigation was conducted in main gathering areas of tourists and residents in Yangshuo County, and the areas were divided into Area A / B / C. Area A, yellow area in Figure 8-7, mainly refers to the 13 streets around West Street, including New West Street, West Street, Shenshan Road, Pantao Road, Guihua Road, Fuqian Road, Furong Road, Diecui Road, Chengzhong Road, Chengbei Road, Binjiang Road, Bilian Lane, Baoquan Road. Area B, green area in Figure 8-7, mainly refers to the surroundings of Jingfeng Road, including 9 streets: Jingchengxi Road, Yuyuan Road, Xiangshui Road, Wuteng Road, Longyue Road, Jiangjun Road, Huashan Road, Lanhua Road and Jingfeng Road. Area C, red area in Figure 8-7, mainly refers to the surroundings of Shima Road and Kangzhan Road, including 8 streets: Shima Road, Kangzhan Road, Mingfeng Road, Guanlian Road, Jinshi Road, Sangyuan Road, East Street and Wujing Road.

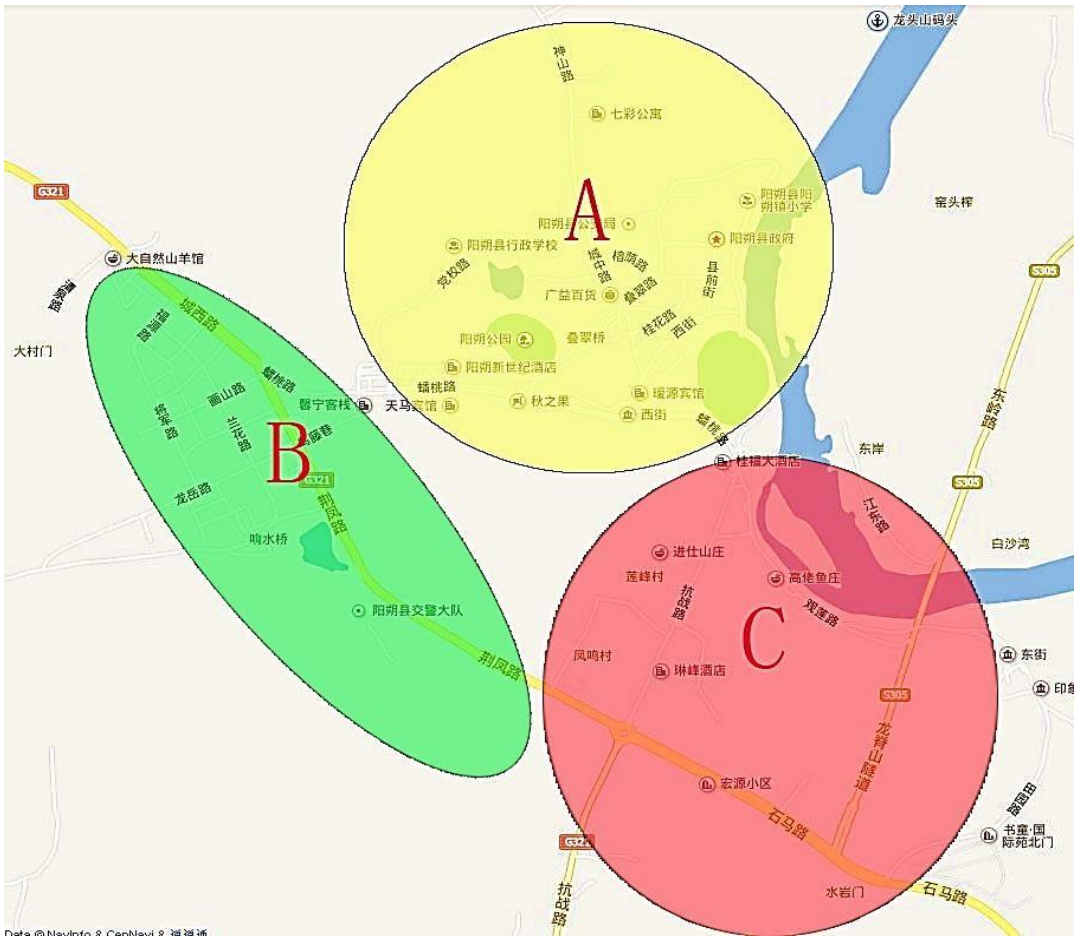


Figure 8-7 distribution of service facilities in Yangshuo County

8.4.1 Service Scope: Services Are Quite Comprehensive

There are various kinds of shops in Yangshuo County, see Table 8-4:

Table 8-4: Shop types in Yangshuo

Shop type	**Explanation**
Hotel & guesthouse	Places for an accommodation: hotel, guest house, inn, holiday resort, resort hotel etc.
Restaurant	Places offering Chinese food: hotel, Chinese restaurant, food stall, rice-flour noodle shop, snack bar, etc.
Bar	KTV, coffee shop
Western	Coffee shop, Italian restaurant, cha chaan teng, French restaurant,

restaurant	American chain restaurant, pizza restaurant, etc.
Souvenir shop	Ethnic costume store, handcraft shop, specialty supermarket, jade shop, special apparel store, calligraphy and painting shop, etc.
Tourism service shop	Travel agency, bicycle rental shop, rock climbing club, agency for air, train and coach tickets, tourist consulting company etc.
Shops for Chinese health care	Shops for foot massage, foot bath, massage, chiropractic massage, sauna, recreation center, leisure clubs, massage center, health club, etc.
Foreign language school	Foreign language school, English college, etc.
Public service facilities	Bank, post office, hospital, large clinic, government department, school, public toilet, telecommunications, pharmacy and supermarket
General merchandise (H2)	Grocery, hardware store, small supermarket, news kiosk, and convenience store etc.
Casual clothing shops(H3)	Brand apparel store, casual clothing store, lingerie store, bedding store, shoe store, luggage store, children's clothing store, etc.
Others	Unclassified shops
Vacant shops	Vacant facade rooms, shops being decorated and long closed shops

It can be seen from Table 8-4 that service facilities in Yangshuo County are quite comprehensive and perfect, and a variety of service facilities can meet daily and tourism needs of residents and tourists.

8.4.2 Service Facilities Distribution: Reasonable Distribution with Separated Tourist Area and Residential Area

The number of shops and their proportion to total shops in each area are as Table -5.

Table 8-5 Quantity and proportion of various shops

Area	Area A		Area B		Area C	
Shop type	Quantity	Proportion	Quantity	Proportion	Quantity	Proportion
Hotel & guesthouse	192	13.28%	95	14.98%	97	15.98%
Restaurant	266	18.40%	113	17.82%	115	18.95%
Bar	46	3.18%	0	0.00%	1	0.16%
Western restaurant	48	3.32%	0	0.00%	2	0.33%
Souvenir	207	14.32%	14	2.21%	26	4.28%
Tourism service	68	4.70%	20	3.15%	15	2.47%
Chinese health care	36	2.49%	32	5.05%	6	0.99%
Foreign language school	4	0.28%	5	0.79%	2	0.33%
Public service facilities	98	6.78%	65	10.25%	68	11.20%

General merchandise	157	10.86%	84	13.25%	201	33.11%
Casual clothing	204	14.11%	16	2.52%	5	0.82%
Others	120	8.30%	190	29.97%	69	11.37%
Target guest						
Shops for tourists	496	34.33%	178	27.81%	142	23.01%
Shops for tourists and residents	618	42.77%	128	20.00%	136	22.04%
Shops for residents	331	22.91%	334	52.19%	339	54.94%

According to the proportion of different shops in Table 8-5, Figure 8-8 and Figure 8-9, we could know that Area A is a commercial and tourist compact district, where the number of service facilities including hotel & guesthouse, restaurant, bar, western restaurant, souvenir and tourism service in this area is significantly larger than that in other areas, and as for the target guests, the shops in Area A mainly focus on tourists, with shops only for tourists occupying 34.33% and shops for both tourists and residents accounting for 42.77%.

Area B and Area C are mainly residential. Relatively, there are more shops for tourists in Area B, more hotels and guesthouses and restaurants, but less shopping venues like souvenir and apparel stores, indicating that the tourists' needs of accommodation and catering can be satisfied in this area. However, there are less commercial shopping activities, apart from hotels and restaurants, shops are mainly those for residents such as home appliance shop, motorcycle maintenance shop, car shop and beauty salon.

Area C is mainly for residents. As for hotels & guesthouses and restaurants, it enjoys the similar number with Area B but has few bars and western restaurants. However, many facilities serving the residents like general merchandise gather in this area. The number of shops for tourists in Area C is the smallest among three areas, while shops for residents the largest.

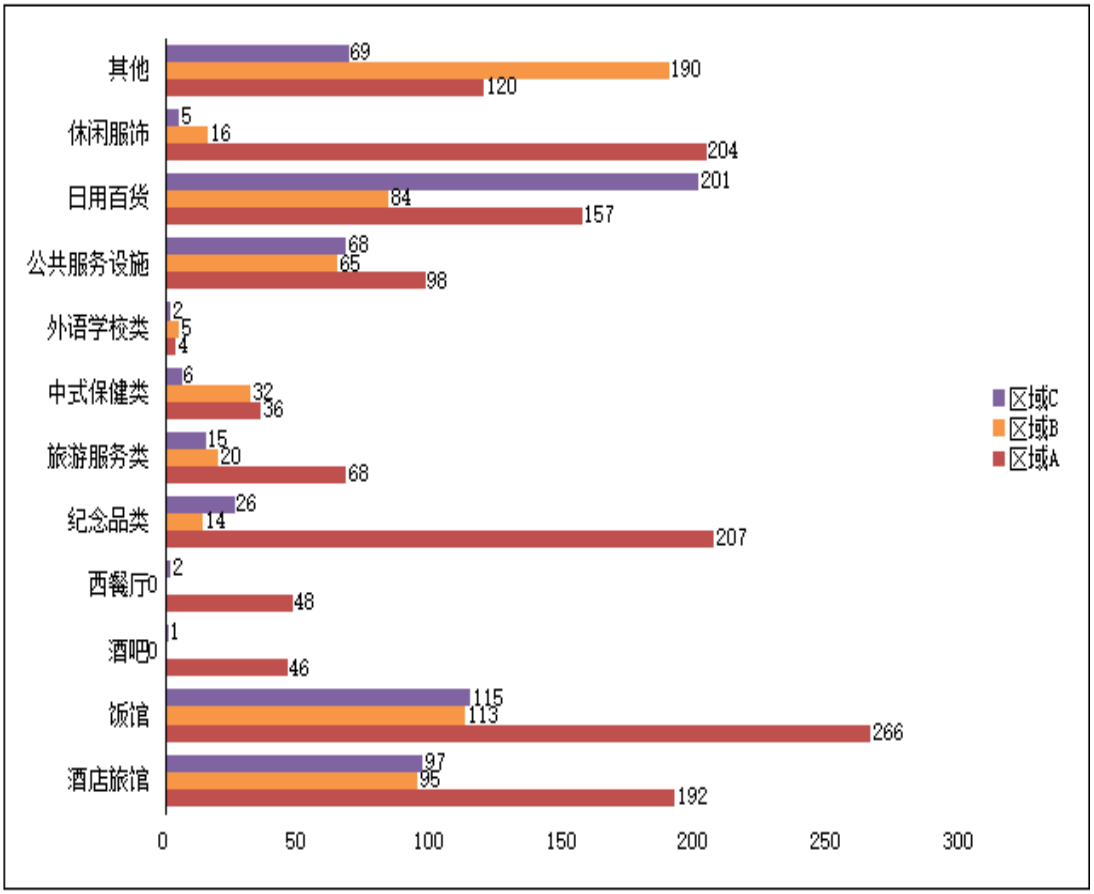


Figure 8-8 Quantity comparison of tourism-related shops in three areas

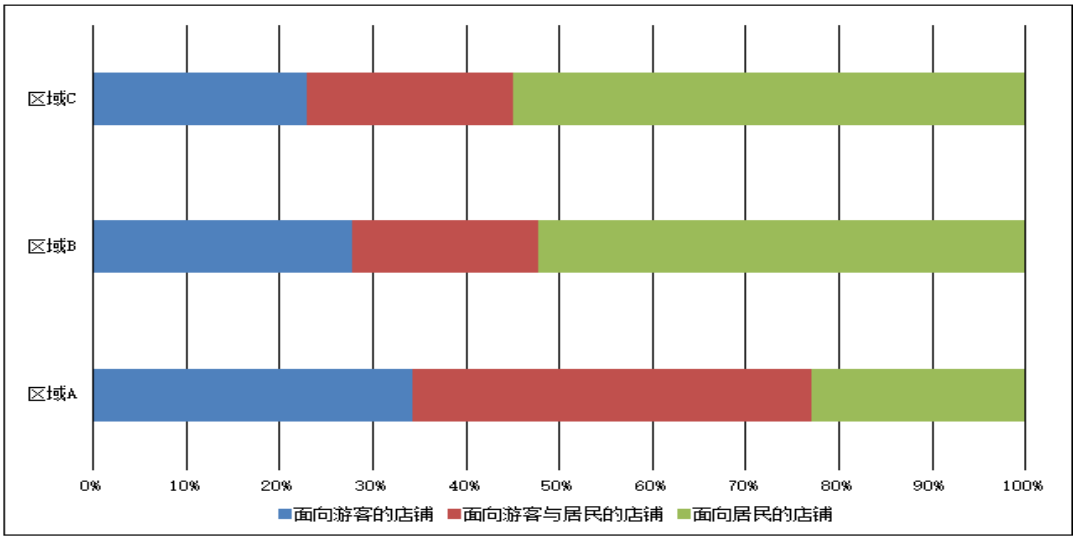


Figure 8-9 Comparison of target groups of tourism-related shops in three areas

On the whole, there are more hotels, restaurants, public service facilities and general merchandise stores, and they are evenly distributed in three areas, which facilitates tourist reception and service providing. Bars, western restaurants, tourism services and souvenir shops are concentrated, which can better satisfy the demands of residents and tourists. To sum up, tourism development does not have much of an impact on the lives of residents, and widely-distributed public services and commodities will fulfil the daily needs of residents and tourists.

8.5 Tourist Response to Tourism Products

Indicators of tourist destination image are mainly embodied in “channels for tourist to get information of destination”, “tourism information expected by tourists”, “tourists’ willingness to revisit” and “tourists’ willingness to recommend”. Corresponding questionnaires were designed to gather information about tourist expectation of destination image, channels to tourism information, image perception and recommendation.

8.5.1 Channels to Tourism Information: Mostly from Internet and Public Praise

Understanding channels for tourist to get information will be conducive to select a more appropriate way of destination image marketing, and to know the effectiveness of various marketing channels. Channels for tourist to get tourism information of Yangshuo are shown in Figure 8-10.

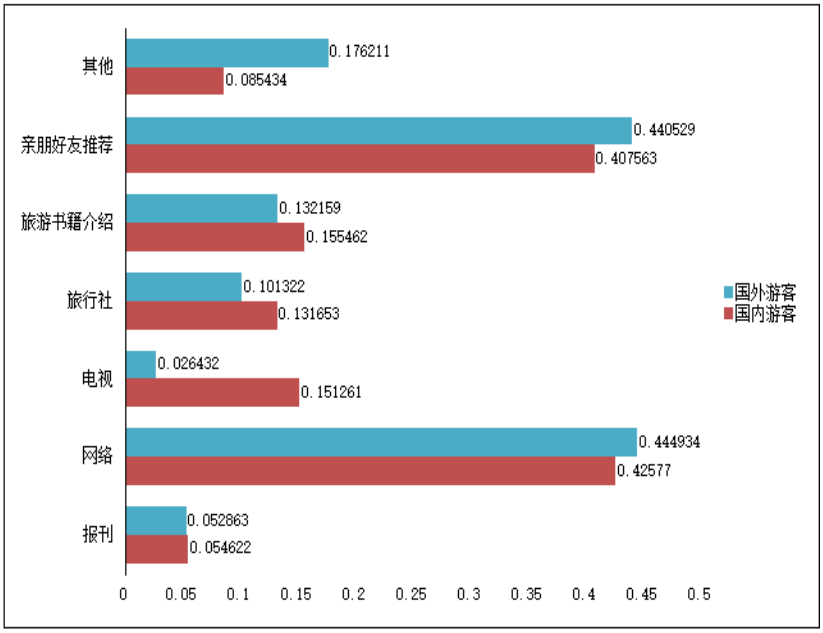


Figure 8-10 Channels for domestic and foreign tourists to get tourism information

Channels for domestic and foreign tourists to get tourism information experienced little changes compared with that of 2013. The most remarkable change is the percentage of getting information from travel agencies for domestic tourists, from 24.2% in 2013 to 13.2% in 2014. According to the results of interviews and salons with small and micro businesses, the reason for this obvious change is probably that unauthorized tour guides take some tourists from travel agencies, which leads to more individual tourists who got less information from travel agencies than group travelers. However, the reason for more individual tourists are multi-faceted, besides the poor operation of travel agencies, convenient public transportation is also an important contributor.

It can be seen from Figure 8-10 that internet and recommendation from friends and families are primary ways for both domestic and foreign tourists to get tourism information. In addition, travel agencies and books play important roles too. However, there exists big difference between domestic and foreign tourists in the number of people who get information from television, with much more domestic tourists but few foreign tourists getting information from television, indicating that referral programs on domestic TV play a certain role in prompting Yangshuo’s image as a tourist destination, while there might be little promotion in foreign television programs. Besides, foreign tourists who get tourism information from other channels accounted for a considerable proportion. Seen from interviews and their descriptions in questionnaires, "Lonely Planet" or other travel guides are found popular among foreign tourists.

In general, channels for tourists to get tourism information are diversified but they are mainly focused on public praise, website and travel guides. Therefore, in order to achieve a successful marketing, it is particularly important for Yangshuo to pay more attention to the development of tourism products and services, to maintain its image as a tourist destination and to guarantee favorable public praise.

8.5.2 Desired Information: Attractions and Accommodation Introduction are the Most Desired; More Foreign Tourists Expect Information on Culture

Figure 8-11 shows that introductions to tourist attractions are the most desired for domestic and foreign tourists, followed by accommodation information, which is more or less the same with last year. Both introductions to tourist attractions and accommodation information are primary information that is necessary for all tourists. Therefore it is necessary to get tourists informed through various channels. What worth mentioning is that less domestic tourists cares about traveling costs, with the percentage dropping from 46.2% in 2013 to 35.7% in 2014.

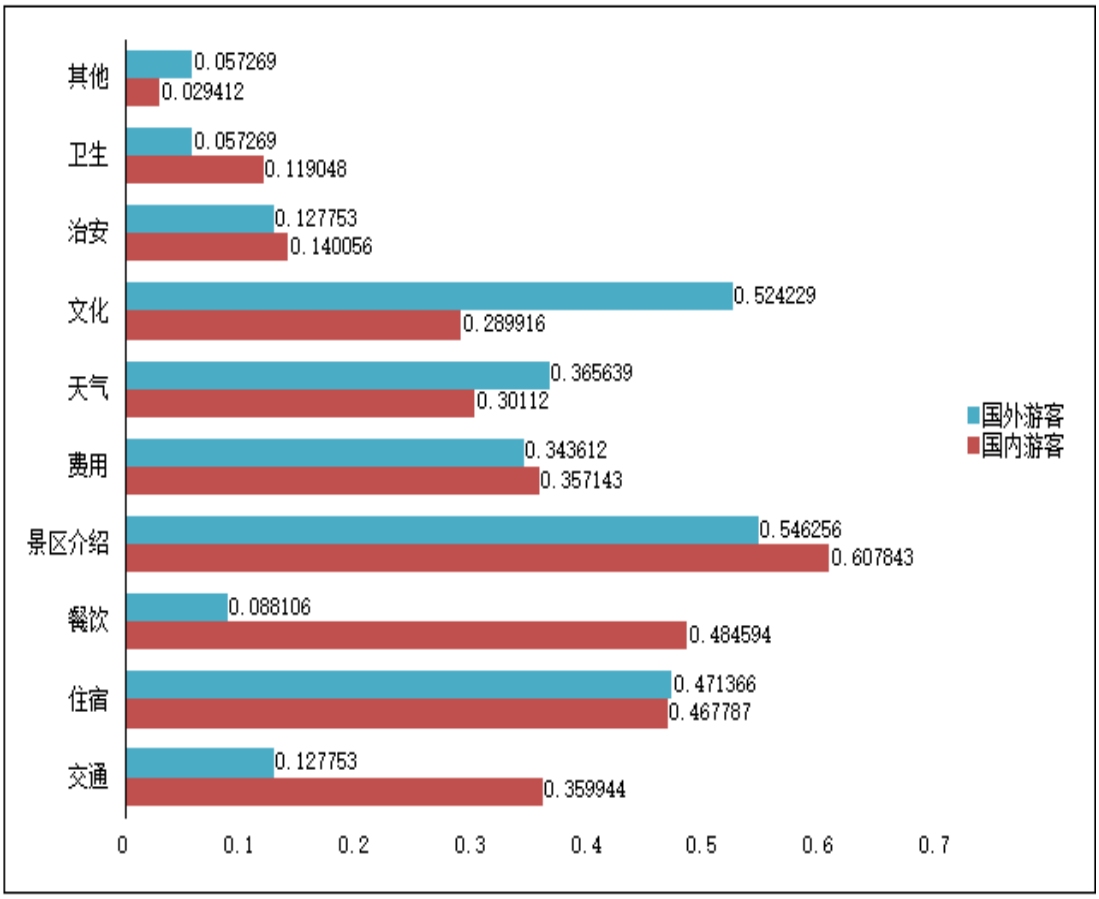


Figure 8-11 Information expected by the tourists

Differences between domestic and foreign tourists mainly show in transportation, catering and culture, which is similar to 2013. Domestic tourists expects more information about transportation and catering, because many domestic tourists travels through self-driving, and domestic tourists prefers restaurants with distinctive local features, while it is much easier for foreign tourists to find a restaurant different from that of their hometown. In addition, compared with domestic tourists, more foreign tourists expect information about culture.

8.6 Summary of the Chapter

The survey team, through questionnaires, field investigation and interviews, monitored the development of tourism products and services in Yangshuo, and the monitoring results are reflected in the tourists' expectation to products and services, purchase characteristics, feedback as well as objective development of products and services.

8.6.1 Sightseeing and Leisure Remain Primary Traveling Purposes

Tourists' expected expenditure in Yangshuo is mainly on products concerning sightseeing and leisure &vacation. But foreign and domestic tourists differ in their expectation on cultural products. There are still lots of possibilities to improve the diversity of tourism products and service, for example, adventure, rock climbing and photography, all can be developed as new tourism products.

8.6.2 Landmark Attractions and Special Local Products are More Popular

In general, foreign tourists are more concerned with the tourism products in tourism destination, and the shop types and travelling routs in Yangshuo are quite comprehensive and diversified, which could satisfy the demands of tourists. West Street is still an attractive place. Foreign tourists are more interested in the natural scenery and local folk culture in Yangshuo. For those memorial attractions, domestic and foreign tourists show no difference. They show obvious differences in attractions artificially created and constructed, like Butterfly Spring, Big Banyan Tree, and Totem Ancient Trail. As for tourism commodities, both domestic and foreign tourists prefer handcraft and special food, and they bought those handcrafts or special food mainly as gifts for friends or souvenirs for themselves.

8.6.3 Service Facilities Are Equally Distributed and Quite Comprehensive

Various service facilities in Yangshuo county can greatly satisfy the demand of tourists and residents, and they are reasonably distributed, for example, the area with strong commercial feature and large number of tourists, resident-concentrated area, as well as mixing area of residents and tourists are separated with each other, so that the tourism development brings less negative impact on the life of residents; and tourist-concentrated area like West Street, is equipped with bars, western restaurants and souvenir shops, offering good service to tourists.

8.6.4 Important Promotion through Internet and Public Praise

Currently, most domestic and foreign tourists are satisfied with the tourism in Yangshuo. Yangshuo, as a tourism destination, has lodged itself in the public mind. The promotion of Yangshuo

depended heavily on public praise and also on internet. The information that tourists expected before travelling remained attraction introduction and accommodation information. Therefore, when introducing Yangshuo to tourists, we should take advantage of public praise and internet and focus more on attraction introduction and accommodation information.

Chapter IX Conclusions

On the basis of first-hand data and second-hand material obtained in field monitoring survey this year, and compared with the data in previous years (2006-2013), the results shows that:

9.1 Residents in Yangshuo Support Tourism; Participation Level to Be Improved

Generally, residents in Yangshuo take supportive attitude toward tourism and acknowledge its economic effect. However, residents' satisfaction level is decreasing, with more and more residents perceiving unfair distribution of interest. Most residents affirm the positive effects, especially economic effect brought by tourism, but they also suffer the negative effects, particularly on environment like air and water pollution and another obvious negative is crowded transportation. Residents in Yangshuo hve strong engagement awareness of tourism but their practical participation and participation level are to be improved. Compared with previous years, channels for residents to obtain tourism information and participate in tourism decision-making have not been greatly improved. What's more, there are still lots of works for government to adjust interest distribution mechanism, improve environment, and establish platform to offer information to and get feedback from residents.

9.2 Higher Proportion of Independent Travelers; Attraction Introduction to Be Improved

Most tourists in Yangshuo are independent travelers. (65.4% of domestic tourists and 70.9% foreign tourists). Domestic tourists, motivated by some special purposes such as experiencing local culture and food, photography and wild adventure, begin to abandon group travel. Tourists in Yangshuo, though large in number, stay a shorter time with lower expenditure. Therefore, more efforts should be put to provide qualified tourism products and service with distinctive features and lengthen tourists' staying through combined marketing. As for channels to tourism information, internet and recommendation from friends and families are primary ways for both domestic and foreign tourists to get tourism information. But no matter through internet or through recommendation,

public praise is very important for the tourism of Yangshuo. It is also found in the monitoring that attraction introduction is the most expected information for both domestic and foreign tourists (19.26% of domestic tourists and 20.16 foreign tourists). Therefore, tourism promotion through internet should focus more on the introduction of attractions and other related information.

9.3 Favorable Comment on Tourism Resources and Environment; Catering Services and Public Transportation to be improved

Yangshuo, with rich tourism resources, beautiful sceneries, distinctive local flavor, friendly residents as well as high degree of social order, has attracted numerous domestic and foreign tourists. Domestic and foreign tourists pursue different travelling experience, but we could still conclude from questionnaires and interviews that their travelling experience in Yangshuo meet or excel their expectation, indicating that tourists are highly satisfactory with the tourism resources and environment. In term of tourism service, tourists are quite satisfied with accommodation and entertainment services but they show dissatisfaction with catering in scenic spots and public transportation. For catering, tourists are annoyed with food similarity and opaque price; as for public transportation, insufficient public transportation, requiring much support from bicycles, has led to travel inconvenience for independent travelers.

9.4 Favorable Health and Safety Environment and High Satisfaction from Residents and Tourists

The health and safety of Yangshuo is slightly above the middle level. Both domestic and foreign tourists are relatively satisfied with the catering hygiene, accommodation safety, and social order, but accommodation safety wanted further improvement, especially improvement in accommodation service and other supporting facilities. As for residents, they are quite content with local security and medical service. Besides, related government departments have strengthen regulation on food safety and public security to create a safe and harmonious tourism atmosphere so as to highlight the image of Yangshuo as a healthy and safe tourism destination.

9.5 Tourism Promotes Overall Economic Development and Independent Adjustment to Commercial Structure

Tourism has promoted the overall development of Yangshuo's social economy mainly due to the high economic income it brought. Tourism enjoys yearly increasing contribution to fiscal revenue, drives the development of agriculture, commerce, handicraft and other related industries, creates more employment training and opportunities to local residents and invites more investment. After analyzing the changes of shop functions between 2011 and 2014, we can find that the total proportion of shops only for tourists and shops for both tourists and residents represented a significant retreat after the rise between 2011 and 2013, indicating a self- adjustment of commercial structure in the changing tourism environment. In addition, among the six shop types which are closely related to tourists, except restaurant and tourism service shop, the proportion of others all decreased slightly, indicating that tourism shops are adjusting themselves according to the needs of tourists and tourism development.

9.6 Natural Tourism Resource Are Highly Attractive; Workable Plans Need Further Implementation

In term of tourism resources, the tourist preference for core attractions and key scenic spots has a bearing on the tourism resources planning and control. On the basis of the market response, tourists prefer natural scenery. To sum up, natural scenic spots are the core tourism resource of the tourism in Yangshuo. Therefore, more emphasis should be put to maintain natural scenic spots, to protect environment, to improve infrastructure in natural scenic spots, and to regulate the management of the natural scenic spots in an order way. In the matter of visitors' flow, the number of visitors should also be well controlled while properly developing tourism resource. What's more, the function transformation and land use are the basis of sustainable development planning for tourist destinations. When regulating and planning for the tourism development, the government of Yangshuo must formulate workable plans according to practical condition and in the light of development, and ensure the implementation of these plans.

9.7 Tourism Resource and Environmental Protection Are Satisfying; Noise Control to be Strengthened

Overall, the tourism resource and environmental protection in Yangshuo are relatively satisfying. Both residents and tourists are content with the environment, especially with the landscape. Due to the policies and plans introduced by the government, the landscape in scenic spots is well protected and maintained, thus tourists and residents perceived a better environment. However, something is to be improved, for example, both tourists and residents felt that their lives or travelling are disturbed by strong noise especially in West Street; in terms of solid waste, residents perceive that the increase of tourists every year has caused great damage to the environment of scenic spots, and tourists also sensed degradation in environment; as for energy management, due to limited fund and knowledge, energy-saving measures in some enterprises have not been fully implemented and some enterprises haven't realized the importance of energy-saving.

9.8 Tourism Products Are Restructuring; Service Facilities Are Evenly Distributed

Sightseeing remains the main traveling purpose for tourists, and landmark attractions and special local products are still more popular. Tourism products are becoming more diversified, with more high-level products and more distinctive features. Tourism information is mainly spread through public praise and internet to attract tourists and encourage revisit. There are still lots of possibilities to improve the diversity of tourism products and service, for example, adventure, rock climbing and photography, all can be developed as new tourism products. Besides, Various service facilities in Yangshuo county greatly satisfy the demands of tourists and residents, and they are reasonably distributed, for example, the area with distinct commercial feature and large number of tourists, resident-concentrated area, as well as mixing area of residents and tourists are separated with each other, so that the tourism development brings less negative impact on the life of residents.

Appendix I: Tapescripts of Small and Micro Businesses Salon

Sun: Unlike other areas in China whose economies are mainly driven by large immigrated enterprises, Yangshuo has a large number of small and micro businesses and a different developing mode. With representatives of small and micro businesses attending the salon here today, we are going to talk about the future of Yangshuo tourism. Now domestic and overseas tourism are showing some new features, which are not trends of the whole industry but some changes you encounter in the process of business running and management. These changes may be positive or challenging. Today we can also share our solutions for Yangshuo tourist problems, which is the very target of our meeting. Now let's welcome Director Huang of the Tourism Bureau to have a speech.

Huang: Since some attendees today may know little about me, I'd like to begin with a brief introduction. I am the Deputy Director of Yangshuo Tourism Bureau and nice to meet you all. Our initial thought was to send official invitation cards but we finally chose to invite you by phone calls since we had only two days to prepare for the meeting. So again thank you for your coming. Now I'd like to introduce our attendees today. This is Professor Sun, Dean of School of Tourism Management, SYSU. She has been showing concern for our tourist development for years and giving great support. I agree with Professor Sun that Yangshuo is featured by its many small and micro businesses. However, most businesses in Yangshuo are not that "small". Some businesses run by managerial elites are already big enterprises to a certain degree. Despite its small size and free-style form, today's meeting is a great opportunity to further develop Yangshuo tourism by getting some suggestions from all of you. The foreign handsome guy on my left side is Roland, the boss of a coffee shop named "Fengwu Café". The person beside him is Ian, the owner of an excellent hotel called "Secret Garden Boutique Hotel". His Chinese name is "Fengzi Ying", which is quite unique. The next one is Li Sha, the boss of Lisa's Hotel. She is a pride of Yangshuo and successfully raises our prestige by showing the beautiful rural landscape of Yangshuo to the outside world. The person beside her is her husband Mr. Li. The next one is our former director of Tourism Bureau Mr. Liu Hongfa. He now is the observer of UNWTO Sustainable Tourism Observatories of Yangshuo. This is Xu Qi, an association president and the other one is Mr. Ou, the principal of West Street Foreign Language School. Mr. Ou has greatly contributed to developing our educational tours by taking 80% of the market share with

his brothers. The next one is Mr. Lu Huaping, the boss of Peach Hotel. This is our master of rock climbing Xi Tang. Is it appropriate to introduce you in that way?

Liu Hongfa: Xi Tang runs an outdoor sports planning company focusing on outdoor exercises.

Huang：So Mr. Xi Tang must know a lot about rock climbing in Yangshuo, right?

Xi Tang: Yes. Yangshuo is a wonderful place for outdoor exercises.

Huang: The next one is Mr. Zheng, the boss of Shanshui Travel Agency, a local travel agency. There are a total of five local travel agencies in Yangshuo. As one of our few local travel agencies, Shanshui Travel Agency enjoys a sound developing momentum. Then let's come to Mr. Mo Gaoyang, chairman of Yangshuo County Literacy and Arts Association. Mr. Mo has a profound understanding of combining culture and tourism of Yangshuo. The next one is Mr. Zhou Xuming, the other former director of Tourism Bureau, who will join our discussion later. This is Mr. Huang, the boss of Rosewood chain stores in Yangshuo, and I am confident that most of you have heard of him before but few have the opportunity to meet him yet. In my opinion, this kind of salon is necessary because Yangshuo Tourism Bureau, as the major department responsible for tourist development, should often communicate with elites from all walks of life.

Sun: Some students sitting behind are from Sun Yat-sen University who have worked on UNWTO Sustainable Tourism Observatories during the last few years. Among them two have earned a doctoral degree and three have their master's degrees, while the others are senior students majoring in Tourism Management. Generally speaking, these students know something about tourism management and can be viewed as audience of our salon today. Of course they can raise any question and join our discussion. Despite the different social statuses, attendees are expected to speak out freely and point out any tourist problem of Yangshuo. We hope to get problems solved through discussion. I suggest that we share our thoughts before a discussion. Who would like to be the first speaker?

Ian: Tom.

Sun: How about Mr. Lu? I suggest everybody take a few minutes to tell us how you got involved in Yangshuo tourist industry before raising problems.

Lu Huaping: Before establishing the hotel, I was already the owner of a small café in West Street. In 1989, I became a student of a vocational school of tourism in Yangshuo. After my graduation, I spent seven years on tourist catering and experienced many professions such as waiter, bar tender, and chef. Then I quit and rented a store in West Street to start my coffee business.

Sun: When did you start the business?

Lu Huaping: It was in 1997. Because of my café, I started to meet a lot of tourists. At that time, the majority were foreign backpackers since Chinese tourist industry was still on its initial stage where most travels were funded by employers. As 80% visitors were foreigners, we were forced to learn English for better communication. Now we have no problem in speaking daily English and enjoy a close friendship with Ian. We treat each other as brothers and benefit from this relationship a lot. When Ian and his friends first arrived in Yangshuo, we helped them a lot in daily life and gave them much guidance on business running, simply because we had no problem in communication.

Sun: In which year did you know each other?

Lu Huaping: In 2001. We became close friends since then and they took me as their elder brother. Actually it was the language competence that changed both our lives. Most of my classmates never received higher education, some even never went to high school. However, I was so lucky that with the sponsorship of my employer, I took the adult examination for higher education and continued study for one year in a foreign language school. Then I also took the vocational high school. However, comparing with studying in school, I think a person will learn more from the society. From 18 to 40 years old, I was in Yangshuo and became a professional of its tourism from an ignorant. In other words, I has witnessed the development process of its tourist industry. Except for the existing tourist market in Yangshuo, we all know that most elements of Yangshuo tourism are introduced from outside since foreigner countries are more developed than us in this field. Especially after the year of 2004 when Chinese statutory holiday was more in line with that of the world because of the entry of WTO, the tourist industry of Yangshuo became prosperous.

Sun: Doesn't it have some something to do with SARS in 2003?

Lu Huaping: I don't think so. The Golden Week holiday arrangement was decided according to WTO, and people had more time to travel since then, which, I think, was the major reason.

(Several people said that the cease of SARS in 2003 had boosted the prosperity.)

Sun: The cease of SARS also mattered. Because of SARS, the entry of foreigners was under a strict control.

Lu Huaping: Whatsoever, after 2004, the number of tourists bounding for Yangshuo increased. Now the number has reached 10 million, while the number in 2004 was 2 million. Many foreigners like Sam, Ian, and Roland came to Yangshuo.

Sun: More specifically, Sam cannot be considered as a foreigner.

Lu Huaping: I don't think so. They are the third batch of businessmen in Yangshuo.We are the second batch while Lisa belongs to the first batch.

Sun: OK.

Lu Huaping: In fact, Roland and Ian can be considered as the fourth batch.

Roland： We don't like the number 4. The number 5 sounds better.

Lu Huaping: The entire market has changed. We cannot follow the old developing mode for backpackers but improve our management and develop our business into chain stores like McDonald's and KFC. Mom-and-pop stores are no longer competitive in the market and most entrepreneurs like Sam have turned to develop chain businesses. Only some typical small businesses like barbecue are still taking a certain part of the market share.

Another problem is about the combination of film making and tourism. I know something about the film industry because I used to be an interpreter of the crew. Films including those from Hollywood are filmed in both Hengdian at Yiwu and Yangshuo. Filmmakers want to make use of the old city landscape of Yiwu and the outdoor natural scenery of Yangshuo. Therefore, a handsome sum of money has been spent on traveling or shifting between these two places. Then an idea comes to my mind that Yangshuo has great potential to develop into a movie city. Government can choose certain places in Yangshuo to build up another "Hengdian", which may include the city landscape of different dynasties like Han Dynasty and Song Dynasty. If this idea comes into reality, Yangshuo will have another tourist resource or program which enables tourists to have an acting experience. With that, film companies will not only come to Yangshuo for outdoor views but its old city landscape.

Another suggestion is that each village in Yangshuo can develop its own characteristic by producing different specialties. For example, a village may focus on the production of antiques while

the other one is famous for its clay sculpture. With that, these villages may successfully attract students from outside Yangshuo for recreation or education.

Apart from the suggestions, there is another problem.There is no doubt that foreign-funded ventures in Yangshuo are more likely to succeed. In addition to the unique foreign culture, the advanced managerial expertise is another reason. Nowadays many national companies tend to hire foreigners to improve its management internally; however, many companies in Yangshuo fail to do so because of the local policy. Last year, I prepared all the materials needed for hiring a foreigner but it was rejected by Yangshuo Labor Bureau. They told me that Chinese company should offer more jobs for Chinese citizens, which was a measure to increase the employment rate of China. I was so confused that why we couldn't hire foreigners and make full use of their advanced managerial expertise to boost our economy. Taking Beijing and Shanghai as examples, they are much more developed than Yangshuo since they tend to be more inclusive in terms of hiring foreigners. The Yangshuo Labor Bureau also told me that people prefer going to solely foreign-funded and Sino-foreign joint ventures, which is a really bad news for our individual enterprises. So I sincerely hope that the Chinese Labor Bureau can adopt more liberal policies in this field. Whatever, this is my opinion and may not be the whole picture of the truth.

Ou: I'd like to talk about the hiring problem. There is no such kind of problem in my school business. We just need to go through formalities such as applying a Foreign Expert Certificate and a Recruitment Certificate. After collecting all required materials and getting them approved by Labor Bureau, we should then have the choice of hiring foreign teachers.

Sun: Are you talking about the Employment Permit?

Ou: Yes. Our school is smaller than your hotel in scale, but we are still able to hire foreigners.

Lu Huaping: The policy for companies is not the same as that for schools.

Ou: I don't think so. A company can also hire foreigners.

Ian: I think Lu means that Yangshuo can be more open in the issue of hiring foreigners.

Sun: Maybe we can further discuss the issue later. In fact, the training school can be considered as a kind of company because it does not offer compulsory education like other public school.

Ou: I'd like to share my opinion that why foreigners are quite good at running business in Yangshuo. Though I am not working for tourist industry, I closely follow the changing tourist market. There are two major features of Yangshuo. The first one is its beautiful landscape while the other one is its foreign language environment. As for the latter one, just as what Mr. Lu said, English has already become the second language of Yangshuo. In other words, foreigners have no communication problems here. It was in 1990 that I came to Yangshuo when Li Sha started running her business. At that time we usually got tourist information or ideas from foreigners because they traveled a lot and knew more about this field. I agree with Mr. Lu that many tourist programs of Yangshuo are introduced by foreigners. Apart from the language environment, internet is another reason. Yangshuo is highly covered by advanced internet comparing with other areas in China and the use of personal computers may rank the first among all Chinese counties, which guarantees us an efficient online promotion. For example, after only 20 days online promotion, Ian's hotel became widely known, and especially the GOGO Tree became popular despite its mud-hutted building appearance. What's more, the price of Ian's hotel is more expensive than those of other hotels in cities, whose decoration are more elaborate with a price range from 80 to 100 Yuan, while Ian's hotel room may cost nearly 200 Yuan for each. That's the so called Personalized Development Mode, which we have talked a lot online.

From the perspective of running a school in Yangshuo, both the beautiful landscape and the foreign language environment are of great help. On our initial stage of doing tourism education, we mainly depended on tourist resources of Yangshuo like other schools. Then we just transformed our running pattern by sharing Yangshuo's resources with other areas around China and became successful in 1993 while other schools failed. We take advantage of the undergraduate student market by offering tourism education to nearly 2,000 students per year, all of whom are from universities and colleges in Guangxi and Hunan. It is the foreign language environment of Yangshuo as well as the guidance that attract so many students. When we first came to Yangshuo, it was easy for us to meet foreigners and practice our oral English. In my opinion, the effective way to improve English is nothing but making friends with foreigners. Just like Mr. Lu and Ian, they are good friends and help each other. There are three levels in evaluating a person's English proficiency. The first level focuses on daily communication; the second is culture; and the third is the use of English in business. The cooperation with Roland's school for a cultural festival is a good example. On the other side,

foreigners also want to know more about China and come here to learn Chinese. There is a Chinese language school in Yangshuo with most of its students being foreigners. Roland has a big project about teaching foreigners Chinese, including Chinese culture like Tai Chi in "Longmu Mountain", which is quite famous now. This project costs 2 million Yuan. We did not have confidence about it in the beginning. However, it succeeded in the end. Many foreigners became students and extended their duration in Yangshuo. From the perspective of tourism, it is the culture as well as its beautiful landscape that attract tourists, which is superior to other places in China. We seek for higher quality of tourist service by combining culture and tourist resources. The Impression on Sister Liu is one of our typical tourist programs. From the perspective of government, the practice of combining culture and tourist resources should be further promoted, so as to attract foreigners to stay in Yangshuo for a longer period. I would like to give you another example. Students of every summer camp in our school would like to visit Yangshuo with his or her families for a second time. Another advantage of Yangshuo is its home-like feeling for every tourist. This home-like feeling attracts tourists to revisit Yangshuo once they have time, which is quite different from other travel cities in China like Lijiang River and Qingdao, because you would not want to visit those places twice. Many of our employees have the same feeling that they will come back to Yangshuo after living in other cities for a certain period of time.

Sun: How many employees do you have?

Ou: We have several dozens. My younger brother has more employees with a number of over 80.

Sun: Does your school only offer short-term programs?

Ou: We have both long-term and short-term programs. In the beginning, our school was a technical secondary school. However, we gradually changed our educational mode and focused on offering language training class. Just as what I said, tourists in Yangshuo are likely to make you feel at home. People are willing to come here with their friends once they have time, which boosts the development of Yangshuo tourism. In addition, Yangshuo had made use of its advanced internet system. Yangshuo was one of the few cities that had internet in the 1990s. When I was still working in Education Bureau of Yangshuo in 1996, we had set up a line with the name "A Beautiful County" linking Nanning and its surroundings. With that, the outside world can directly make phone calls to

people in Yangshuo. At that time, foreigners were surprised to find schools in Yangshuo, such a remote and poor place, had access to internet. Then the internet of Yangshuo developed quickly and took the lead in China. Local hotels started to promote through internet platform and won a national fame despite its disadvantageous locations. Let's come back to the question that why foreigners are good at running business in Yangshuo. Apart from a full use of the internet resources of Yangshuo, they focus on developing customized services. They always think about the need of the guests and try to fulfill them.

Our Chinese businessmen seldom think in that way. Generally, I think that knowing the need of guests is the most important, which indicates a developing trend of customized services. Customized services are talked a lot recently on the internet, which is also the future business mode of Yangshuo. Actually in the past two years, I emphasized the offering of customized services in my hotel investing business. For example, if the location of your hotel is not that good, you can think of a package service by offering vehicles to the guests. If the traffic problems were solved, it would not be difficult to attract tourists, since Yangshuo is such a small place. For example, it only took me 15 minutes to ride here today. Yangshuo is that small!

Sun: What are the features of your tourism education?

Ou: The most typical one is the involvement of foreigners in Yangshuo. Students in my school can talk to foreigners immediately after classes, and they are taught how to make friends with foreigners. For instance, you can talk with a foreigner about your travel plan. This morning I just talked with Roland and learned that where he is going for dinner tonight. Then I will go to meet him again. With that, you may ask him about the plan tomorrow and join him no matter what. After chatting several times you will become his friend and your English will be definitely improved. The first chat with a foreigner is a small talk and only after that can you talk with him on more valuable topics.

Sun: How many foreigners in Yangshuo have this kind of cooperative relationships with you? I mean, will you tell them that you talk to them simply for English improvement?

Ou: We are trying to do so. Actually both students and foreigners are in need of communication. For instance, the owner of a local pub came to Yangshuo many years ago. He is willing to talk to someone to kill time no matter what. It is a win-win situation.

Sun: They are businessmen and they may not have time to chat with you.

Ou: It is not the case. They are bosses so they have a lot of time. Now in Yangshuo there are nearly 200 foreigners.

Sun: What is the permanent residential population of foreigners in Yangshuo?

Ou: May be over a hundred.

Roland: No, 80 at most.

Ou: It's hard to say. The number is growing.

Roland: Yes, if taking those from Hong Kong and Taiwan into account.

Sun: Should we take people from Hong Kong, Macao and Taiwan into account?

Ou: Yes.

Roland: Then the number will hit a hundred.

Sun: It makes sense.

Ou: In summer vacation, the number will be much bigger, because teachers including those from overseas are willing to come to Yangshuo for holiday. I think we can establish some tourist programs for these people.

Sun: In your opinion, education industry that you are working for still has great potential for development.

Ou: Yes.

Sun: Because people are always in need of education.

Roland: I agree with you.

Sun: It boosts the development of tourism, and tourism education does not face any challenge like the other businesses.

Ou: Yes.

Sun: Are you going to expand your school business by entering the hotel market?

Someone: Though the demand for education helps a lot, tourism education still encounters its bottleneck in development because long term programs are not as popular as before.

Ou: The demand for education is what matters. The reason why long term programs are not as popular as before is that people who take tourism education are from other areas, given the high consumption expenses in Yangshuo, it is hard for these people to stay for a long time...

Sun: Yes, cost is another factor...

Ou: For example, it is hard for an adult to quit a job and come back to school for education, because he may consider the educational result as well as the loss of quitting a job. What's more, daily expenses nowadays are increasing...

Sun: Yes.

Ou: Well, these are my opinions...

Sun: Who would like to be the next speaker?

Li Sha: Here is my turn. When I first came to Yangshuo, I started my business of selling pickles and dumplings. It was a difficult time in my life but I had many opportunities to talk to foreigners and made friends with them. Just as what Mr. Ou said, in the beginning I could only communicate with them by body language or writing. Then my English was improved after a long time communication. Specifically, it was 1983 that I first came to Yangshuo. Today I am going to talk about the transformation of small and medium-sized hotels in Yangshuo which mainly includes three points. After the opening up of the past thirty years, Yangshuo must seek for a transformation to achieve a sustainable development. Actually all the personalized hotels what Mr. Ou have just mentioned are transforming its developing mode. My point is that the quality of indoor furniture also needs to cater for the demand of guests. We should improve the indoor facilities.

Sun: It is a kind of standard that we should follow.

Li Sha: Yes. Major small and medium-sized hotels in Yangshuo only focus on improving the external appearances of the building, and are likely to overlook the quality of their indoor facilities. No matter how splendid the building viewing from outside, the poor indoor facilities cannot fundamentally improve the level and prestige of your hotel. From this perspective, we businessmen should be truthful by offering good services with an appropriate price. That's what I want to say.

Someone: Li Sha has put forward an important idea that we should be truthful, and key words of her idea can be concluded to integrity, price, and service.

Sun: You have indicated that businessmen in Yangshuo should spend more money in the improvement of services and facilities. Besides, can you share more information about the current situation of the mobility of employees?

Li Sha: In Yangshuo, we seldom see a boss fire an employee and in most cases, and it is employees who choose to resign. So we treat our employees so well in case they quit. In the past, we can directly point out their mistakes but now we have to care more about their feelings. We will talk to them in a more euphemistic way and with more patience.

Sun: It sounds like you dare not criticize your employees when they make mistakes.

Li Sha: That's the case.

Sun: Because of the high mobility?

Li Sha: Yes. It's easy for them to find another similar jobs in Yangshuo.

Someone: Apart from a great amount of job opportunities, people at their age do not want to work.

Sun: Do you mean that the gap between generations is also a reason?

Li Sha: Yes. Most of these employees are born in the 1990s and they don't want to work hard.

Mo: Actually this is a problem caused by the one-child policy. Parents are likely to spoil their only child.

Sun: How about other areas in China? Is Yangshuo more serious in this issue?

Someone: The whole country faces the same problem, I think.

Ou: Because of the current situation, regulations or authority are no longer the key principles for company management but a good relationship with your employees. You should have a good understanding of the characteristics of your employees and make friends with them...

Li Sha: For example, our hotel does not allow employees to play video games during their night guard. However, by checking the monitor, we often find some of them breach the regulation. In spite of this, we dare not punish them in case they quit.

Sun: Where do your employees come from? Are they local or from other places of Guilin?

Li Sha: Most are local people of Yangshuo.

Sun: So we can conclude two problems, which are about inner management and the improvement of service.

Li Sha: Yes. Both of them require our investment. No matter how you recommend your service, guests will only choose those which really meet their expectation.

Sun: At present, which kind of tourists do you receive more often? Group or individual?

Li Sha: The guests of my hotel in the town are usually groups. Of course there are some individuals, which are mainly Chinese.

Sun: Do you often receive foreign guests?

Li Sha: Yes, generally speaking.

Sun: What is the probable percentage?

Li Sha: Maybe two thirds of the guests this year are foreigners.

Sun: It is a high percentage.

Li Sha: For some hotels, the price of a same room for domestic tourists and foreigners is different.

Someone: Generally speaking, foreigners have better living habits than domestic tourists and are more likely to protect indoor furniture. So we need not pay a lot in maintenance.

Sun: You mean the fee for the maintenance of the facilities...

Someone: Yes. Regarding this factor, the price we offer foreigners may be a hundred Yuan off the one offering domestic guests.

Sun: But the prices are very close.

Li Sha: Yes.

Sun: Then did you encounter any employment problem in your business?

Ian: Yes. As you can see, my hotel is located nearly seven to eight kilometers away from Yangshuo which have many other hotels. So we need to offer a higher salary otherwise we can't hire any employee. They often complain a long distance and a large expense in transportation, so most of them are reluctant to take the night duty. They may be angry if I indicate any fault in their work. Once

my business partner told me not to blame them even though they did something wrong, in case they quit.

Sun: So does a higher salary work?

Ou: It may help a little but...

Li Sha: Not absolutely.

Someone: The salary standards of different hotels are not significantly different.

Ou: Yes.

Ian: Because Yangshuo has so many hotels which are in need of servers, it is not difficult for them to find another jobs.

Sun: So how do you come to Yangshuo and start a business? Through all these years, what are the changes of Yangshuo?

Ian: It was 2001 that I first came to Yangshuo. At that time I was a tourist guide...

Sun: Which country?

Ian: It was a British tourist agency, most of whose clients were Britain, Australia and America. We often traveled two or three weeks in China and we could only have Chinese food. In 2001, few Chinese could speak English so we were so delighted to visit Yangshuo, because many people in Yangshuo knew English at that time. In Yangshuo, I was not bothered so much in arranging itinerary for my tourists. They can also find places to have western food. Lu was the first Chinese I knew and since that time, we had become friends because his English was so good and we had no problem in communication. In Yangshuo, there were lots of foreigners while the number of Chinese was fewer. In West Street, several coffee shops and hotels had already started business though the total number was much less than present. The food at that time was much cheaper, too. Gradually, after 2002, more and more Chinese would like to visit Yangshuo to meet foreigners and to taste Western food like pizza. For those who cannot afford to travel abroad, Yangshuo was a good place to go. With the coming of more Chinese undergraduate students to Yangshuo for English learning, Yangshuo became so famous and the price of commodity rose. In 2001, the housing price in West Street was so affordable and had many residents. Nowadays, the price has skyrocketed and many people have moved out from West Street. Now it is hard to run a business in West Street because you need to pay

a handsome sum of money to the renting and labor. For example, employment cost four years ago for a single labor may be 50 Yuan, while the cost may rise to 150 Yuan, over a three-fold of the original one. In 2001, the salary for a server may be 300 or 400 Yuan, which may cost 2000 Yuan at present. The rent may cost 30,000 to 40,000 Yuan per month, so it is hard for a company to survive in West Street.

Sun: How about Li Sha's shop in West Street?

Ou: She has closed it up.

Li Sha: I used to run a bar with a partner in West Street. However, after two years I rented it to someone else and moved out of it because running a bar was so bothering and noisy. Once a group of guests woke up at 4 in the morning and insisted changing a hotel. At that moment, all the other rooms of my hotels were occupied and in the end I had to pay 300 Yuan each room on my own to get them rooms in a downtown hotel.

Sun: You also suffered from the noise, right?

Li Sha: Absolutely. I had no choice under that circumstance.

Ian: I used to live in Binjiang Road in Yangshuo for nearly five years, which was a good place to watch sunrise every day. However, in the last few years I cannot fall asleep and had to move to a suburb for a better sleeping environment. The only reason was her noisy bar...

(Everybody laughed.)

Sun: What was the opportunity for you to resign your guide job and start a business in Yangshuo?

Roland: In 2002 I was still a tourist guide. Then I became a deputy manager of Chinese office of that British travel agency which was located in Yangshuo. After a few years I was appointed to be the manager-general but I refused because I felt bored of sitting before a computer the whole day. Then I quit and became an architect. I rented a building in Yulong and wanted to protect it.

Sun: You have rented a building in the Old County Village, right? What do you mean to protect it?

Roland: Yes, because I had no place to live at that time and wanted to reuse that building.

Sun: Which year specifically?

Roland: 2010. It was only four years ago. That building was so beautiful and was renovated by myself. There is another building near the foothill, too. Since these two building have deficiencies, the rents are much cheaper than the other buildings. There are a total of nine landlords and they asked for a twenty years' rent and required me to pay the whole rent.

Sun: How much in total?

Roland: The building in the back costs 1,800 Yuan a year. So 20 years sum up to 36,000 Yuan. The building in the front costs 6,000 per year. After paying the rent, I had no money left and found a business partner. She was the manager general in my previous company. She happened to looking for a place to start a hotel business so we cooperated. Then we lent some money from the bank and run a hotel business until now.

Sun: How many did you invest?

Roland: I have no idea. Since I had two buildings, we only made a loan of 550,000 Yuan from the bank and borrowed another 200,000 Yuan from our friends for indoor renovation. In addition to that, I did not remember how many money we invested into our business because we use our profit to expand our business later.

Sun: I went to your Secret Garden Boutique Hotel yesterday. It is so beautiful, which reminds me that you were once an architect. I recommend everybody present today to visit Roland's buildings, which have made a full use of the interior and external space. Taking the advantage of topographic condition, Secret Garden Boutique Hotel is a distinctive hotel with a mountain as the backdrop. In spite of that, do you suffer from any problem of your buildings?

Roland: Yes. As you can see, Yangshuo in February rained a lot, so the tile roof was damaged a lot. Now I am still fixing it.

Sun: How about the volume of your business recently?

Roland: I think the volumes in July and August this year were less than that of last year. On the initial stage of our business, though we had only six rooms, our business was growing and then expended to today's eleven rooms. However, the number of the rooms we sold in this year's July and August was much less than that of last year.

Sun: Why? It seems that all of you had encountered the same situation. Was it mainly due to the reduction of the number of foreign tourists?

Roland: Yes. The number of foreign tourists has decreased. Generally two thirds of our guests are from abroad. In my view, there are several reasons. First, though foreign tourists make a reservation at my hotel, it is still difficult for them to get visas. Second, more security and environmental issues of China have been reported abroad. For example, because of the Tibet issue, foreigners may think the railway stations in China are dangerous. The air pollution in Beijing also affects the volume of tourists. In addition, China has some conflicts with Japan and Vietnam recently. All these issues are reasons that the business volume of this year was less than that of last year. Many foreigners dare not come to China on such an occasion. I hope that they will still travel to China someday.

Sun: Do you have a good relationship with the farmers around? How about Xi Tang? What is your opinion?

Xi Tang: OK. Today I would like to talk about three issues. The first one is about rock climbing in Yangshuo. Second, it is the so called outdoor tourism, and we focus on the competitive market. Third, it is about sports event tourism and festivals. Yangshuo is famous for its rock climbing. I hope you have heard of it before. It was in 2000 that I first started a business of rock climbing in Yangshuo. At that time we had only 30 routes. However, until this year , we have 1,050 routes, whose quantity ranks No.1 in China.

Many tourist patterns have transformed. We are no longer satisfied with sight-seeing, which is the main form of traditional tourism. Now we focus on the experience tourism. Comparing with traditional tourism, experience tourism emphasizes the feeling or experience of tourists themselves by living with the local or participating certain local activities. Most reality shows on TV concerning outdoor exploration and quality education belong to this kind of tourism. In my opinion, the traditional tourism of Yangshuo has reached its bottleneck and needs to be transformed. Yangshuo is rich in its rock climbing resources and has earned itself a name in this field. We have four famous rock climbing routes and the Yangshuo to Xingping one is the earliest and the most famous one in Chinese history. Apart from rock climbing, Yangshuo has many tourist programs suitable for developing experience tourism, such as Tai Chi, bamboo rafting on the Lijiang River and customized

schools. All of these programs will offer a better tourism experience for people. In general, it is time for Yangshuo to change its traditional tourist mode and develop experience tourism. In addition to cultural and photo tourism, outdoor tourism is another kind of tourist mode. By this, I'd like to share with you a story about the development of rock climbing in Yangshuo. Twenty-three years ago, a world-class rock climbing master arrived in Yangshuo and established the first rock climbing route in China. After these years' development, there are over a thousand routes in Yangshuo now. It is a pride of us and we should promote it. Each year many backpackers from around the world come to Yangshuo, which is good for the promotion of the rock climbing sport. In 2008, I organized the Yangshuo Professional Club, which serves for the general public. I was also the organizer of the first Yangshuo Rock Climbing Festival. We had over a hundred participants at the first session. In spite of the small number of people, we had successfully got support from the first-class brands or multinational enterprises. Last year we had held the sixth session.

Sun: Do you hold the festival once a year?

Xi Tang: Yes. Such influence attracts many rock-climbing clubs around China to come to Yangshuo and learn from us. Last year we had over a thousand participants. What worth mentioning is that the internet promotion has improved the prestige of Yangshuo. By uploading the latest and accurate data of rock climbing, people outside Yangshuo also learn about the sport and consider that Yangshuo is not only famous for its traditional tourism but its outdoor tourism. In general, it will boost the business of yours present here today as more tourists come to Yangshuo. Now we are organizing this year's Rock Climbing Festival and has got support from the biggest outdoor sport brand in China. Besides, we have reached cooperation with outdoor alliances and clubs around China and outdoor websites. We hope that the local government can support our festival and promote it.

Now comes to my second point. Yangshuo is not only rich in the rock climbing resources. In other words, we can develop other sports in Yangshuo because climbers are likely to attend many kinds of outdoor activities. Taking me as an example, I attend other competitions around China and serve as a referee from time to time. Based on my understanding, Yangshuo can establish other competitions like marathon, which will highlight the beauty of Yangshuo's scenery. However, it may ask for a great support from the local enterprises. After talking with tourist organizations last time, I got an idea and now I want to share with you. Based on an environment of combining Chinese and

foreign culture, Yangshuo is a wonderful place to hold an international carnival, which will be a name tag of Yangshuo just like the beer festival in Qingdao. As for Yangshuo, we can establish Bar Festival and rock climbing processing like all the sections in marathon. Light up the city with a carnival. In the off-season, we need a stunt to attract tourists. Now the tourists are not short of money, but lack of a stunt. That is, in the past if I went for travel, I considered money and time. But now if I plan to travel, I will go to a place with a stunt. I can fly there whenever if like. We can make stunts in race tourism, celebrating tourism, or festival tourism. We need to well-establish it. Most of you are doing business, especially business concerning eastern and western culture. Last time I made a speech, hoping to set up a carnival-like mode in Yangshuo, in the name of Tourism Week. In this case we will have a stunt, so that more people pay attention to Yangshuo. By doing so, it will benefit everyone here virtually. I set up a Rock Climbing Festival and I was invited to Zhangjiajie Tourism Festival and Tibet Tourism Festival to do research. Our successful cooperation offers us new hope. The organizers of Tibet Tourism Festival also asked me to design outdoor activity. In fact, I think Yangshuo owns very good resources, but it hasn't been explored reasonably. If explored reasonably, Yangshuo will step into a higher level. Zhangjiajie Tianmen Mountain activities have been established for many years. Besides, Zhangjiajie train has been established for two years. I think we'll have a high-speed rail here; I want to do event-marketing. If you hold the rail ticket to Yangshuo, you are free to get other tickets, which will generate sensational effect. It will be reported and advertised in the network media, publicity, tourism sector, the whole country or even the outside world so as to build a good image. The activity of free ticket cost less compared to advertising which may cost tens of millions of dollars. Once the free ticket activity is reported, it may have sensational effects. So I recommend it. I'm working for Lhasa Tourism Bureau, which attaches importance to large-scale event-marketing, Yangshuo festival experience is an event-marketing. We hope the proposals that I discussed with William and LISA can be passed, through Tourism Bureau talks. We hope to achieve great effect by low cost. Especially in this year Yangshuo forged a friendship with Allah 11th city, a city in France, in the 50th anniversary of Sino-French diplomatic ties. French culture links to mountains and outdoor activity. Similarly, and existing resources in Yangshuo is suitable for rock climbing, outdoor activity. I agreed with an Ambassador of France, who is a colleague in outdoors portion Yangshuo and Tibet embrace the potential to develop into outdoor activity villages. Mountain culture and training system in France can also be transplanted to Yangshuo as well as French outdoor film festival. Because Yangshuo is ideal

for some projects done in France. Cultural input makes Yangshuo better and people across the country better learning. With authentication, it is better for people to accept. As for others, like traditional tourism, I don't reject. I just hope that we can publicize it, because we are all Yangshuo people.

Sun: New Yangshuo people.

Xi Tang: Yes. I finished my speech.

Sun: Well, how large should the outdoor activity share? How is the market? The trend? Should its share become larger?

Xi Tang: I think so. What you ask is the same to the question from the government. The share, taxes...

Sun: No, not that. I asked about the trend, not the absolute amount. Is it a consuming trend?

Xi Tang: The consuming trend is great. Other cities in our country are selling outdoor activity brands, but Yangshuo does not although there is a great amount of outdoor resources.

Sun: Yes.

Xi Tang: Frank speaking, Yangshuo did not make a good use of its rich outdoor resources.

Sun: That is why I was so astonished when you said Yangshuo was a place of rock climbing. Even though I am so familiar with Yangshuo, I have never heard that Yangshuo is famous for rock climbing, which even wins an international fame. Given that, I think there is still room to improve our marketing strategy.

Sam: I am convinced that rock climbing sports in Yangshuo ranks No.1 in China.

Xi Tang: I agree with you. It may rank the first in Asia.

Sun: Are you sure?

Xi Tang: The government worries that rock climbing is a high-risk sport. It has been held for many sessions, known for risk and challenge in the world. I understand our government, because people worry about the risk.

Sun Jiuxia: I do not think so. Particularly, I am familiar with Zhangjiajie. Zhangjiajie takes advantage of event-marketing measures of this kind. For example, its tourism still develops even though a flying accident causes death of tourists.

Xi Tang: Because its insurance is considerate and well-organized.

Sun: Yes, because it was just an accident. It can't indicate that there is problem in the management of Yangshuo. In fact, I'm worrying about the image of Yangshuo. Yangshuo has changed a lot, and I feel sad recently at the sight of West Street and Yulong River and I'm concerned about the increase of quantity instead of quality as well as low-end features as cheap things and services make the whole market in a mess. In addition, we need to pay more attention on the crazy increase of rural buildings, as its part of the transformation of rural areas. In fact, Yangshuo can attract tourists partly because all of you present, you can help Yangshuo become more characteristic. But in the future it is very important to highlight and optimize the shining points of Yangshuo structurally. Therefore travelers are necessary as they can explore the good features of a place. As you have just mentioned, do you have a route for mountain bicycles with distinctive features?

Xi Tang: Yes, of course.

Sun: Like the routes in western countries?

Xi Tang: We can do that.

Sun: Yes, OK.

Xi Tang: I am also considering that people may be a bit worried about rock climbing activities since it has been held for many years. So my idea is to set International Carnival in the whole street or the entire West Street like in Sam's country. I took part in that kind of activity for many times because I have lived here for more than a decade. We provided free items, or warmed up the atmosphere with light decoration. And West Street is actually a good camping spot. For example, in Shazhou, we could hold a thousand people camping assembly, set a food street across it and something like that, as Principal Hu said. It was in 1997 that I attended Hua Kelan School. The principal was Mr. Hu.

Sun: So you're his student.

Xi Tang: Rock Climbing Festival may be a little unrealistic. But if we set up International Carnival with everyone involved, we can gain marketing effectiveness. In the future there may be four or five festivals a year, with a relatively larger one at the beginning of the year. So it is much easier to enhance the reputation of Yangshuo. We provide a great platform, and everyone is willing to promote it.

Sun: Sam says he is supportive.

Sam: I am for this good concept. We can launch activities every month, from January through the end of March. For example, a hotel can offer restaurants charge by two days-staying in the same hotel from November to December. Anyway the tourists will use the charge in New Year. In high season, hotels are certainly reluctant to participate, but in off-season we can hold these activities. I oppose to compete by lowering prices. By doing so, the profit will reduce and the guests will require for more. Meanwhile there will be more guests purchasing low-end services and products. The price should be the same throughout the year. Once other hotels get the price lower, charging two day fees for a three-day staying, we are not able to do business.

Xi Tang: I think this idea is very good. What we are doing is WeChat marketing. We launch a variety of festivals, like Rock Climbing Festival, marathon, Beer Festival or the West Street Food Festival, together with a Yangshuo Hotel Festival, into a large event.

Li Sha: Bonfire Festival, Torch Festival, etc., right?

Sam: In terms of 383 Hotel and restaurants in my country, as long as the hotel is allowed, seats can be reserved. It is not difficult to negotiate with government. It won't clean up the street unless people in the way, right? I think we should have begun since last year.

Xi Tang: We are planning. Next we may project it in details.

Sam: With good brands and good performances, it is easy to attract many people. It is great to enliven tourism with hotel offers and meal discount.

Li Sha: This is really good because the hotels in Yangshuo suffer a lot in off-season. I strongly support it.

Huang: I am not the person in charge in this issue, although we often promote it. In fact, it lacks features in promoting. For example, there's still room for improvement in setting the slogans. It is important to launch a pilot project and set an example.

Sam: Yes, 30 to 40 restaurants can manage to promote in streets like New West Street, or maybe Guihua Road. In winter, it should be boosted by government.

Xi Tang: The villages move out from the table.

Huang: But in fact, it may be good to hold activities led by the Government with community involvement at the same time. The government should take the leading role.

Sam: I have not finished. With so many ideas, Xi Tang, you can put forward a plan.

Xi Tang: I am now an ordinary citizen instead of an official.

Sam: You should communicate to the relevant departments with a plan to guide different hotels, villages under participation. I think the access is possible. Rock Climbing insurance must be ensured fully. The Government tries to solve problems and the hot air balloon activity is likely to end permanently as four people dropped from a balloon and died last time. Hot-air balloon activity is a good project for high-end consumers, though.

Li Sha: Yes, especially in Yangshuo.

Sam: Yes. What a pity. You (Xi Tang) can also apply for this, I mean, you can handle this program well.

Sun: That has to go through the approval of Air Force.

Huang: You can make a proposal and show it to us if it is possible.

Sam: Insurance must be perfected. Every hot-air balloon takes off early in the morning. The government and citizens supervise this project by themselves. They must signed it and take responsibility.

Roland: It is necessary to offer green light instead of red light. But there must be someone in charge, although most people do not like to be responsible for this matter. If there are problems, they'll cancel the project.

Sam: Solving insurance issue is solving the whole problem.

Roland: They are not ready to face a problem. Once there is a problem, they will cut off the project.

Sun: That is one size fits all, right? If you earn money and make it here, it can spread elsewhere. We have practiced that before without success. So how can we manage it now?

Li Sha: In fact, in the past, several hot air balloon businessmen here were very responsible.

Roland: But that was their own business, nothing to do with the government.

Sun: William said he wanted to learn from Mr. Huang, who is going to open a chain of industry. How do you feel to open a chain? Is that great?

Li Sha: He nearly conquers the whole street. In this way he will cover our market. I will switch to another business if I can't earn money in the two coming years.

Sam: Now I will say what I think about this. Just now someone mentioned the High-speed rail issue, which is in fact, a favorable turn. The Dean just said that now there were too many low-end products in Yangshuo. I suggest that we go to Gulangyu and Lijiang River to get to know more. Then you'll find that the price there is definitely higher than Yangshuo. But we all know that doing business in Yangshuo has formed its own pattern. We think that Yangshuo is definitely better than other places. But now the problem is that we do it so badly. Take tourism as an example, some tour guides can even do the job for 5 Yuan only. Then some restaurants have to lower their price. The first thing you need to know is that the restaurants and hotels are important as the tourists will always need them. The second thing is, the more you lose in the business, the more trouble you'll get yourself into. Losing money would prevent you from providing better service. I think the High-speed rail in Yangshuo can be a favorable turn. The businessmen need to achieve good reputation. As for the price, I think we can make adjustments. Even for the new merchants just getting into the business, the price shouldn't be too low as long as they have their own characteristics, because low price can only be troublesome. Take my own experience as an example, many years ago I opened a Hong Kong Tea Restaurant, and the wonton noodle is certainly on the menu. At first I made it 12 Yuan per set. Then the customers said that was "daylight robbery" for the Yangshuo rice noodles were just 2.5 Yuan. Later on I changed the price into 25 Yuan and no one ever complained about it. Why? What I offered is something different. The customers read the menu and feel that they're different things. Let alone the small inns. Lisa and her partners are experienced. If rooms are clean and tidy, the business can go smoothly very easily. The problem is whether you have interest. You can make it big without large investments or chains. The High-speed rail built in Yangshuo can bring great opportunities. The customers who drive here now are going to take the High-speed rail later on. During the tourist season, there's almost no room for parking, and the limited parking space is unreasonably expensive, let alone the golden week. However, these are all our potential consumers with great purchasing power. They can arrive here within two hours from Guangzhou by the high-speed rail. The real tourism development of Gulangyu started from the opening of the high-speed rail from Shanghai to Gulangyu,

which led to its first tourism peak. Last year, the train to Shenzhen was also opened, but it's far less convenient than Yangshuo. It would take you 10 minutes to get to Xingping and 30 minutes to get to Yangshuo by tourist bus, which is far more convenient. The customers can arrive here on Friday and go back on Sunday morning. There are many medium and high customers so I think this is an important turning point. I can be treated as the third generation of Yangshuo West Street. Back then the boost was largely dependent on backpackers, right?

Huang: I belong to the third generation that Sam just mentioned.

Sun: Ha-ha, the third generation.

Huang: The big success of Yangshuo largely depended on the backpackers. But the thing about backpackers is, they lack no money but they would make their own budget and spend certain amount of money each day. For example, if they plan to spend 5,000 Yuan in China for a certain period of time, it would be so annoying to make them spend more than they planned. But back then a bottle of beer only cost five Yuan and backpackers kept floating to places that are cheap enough. That time has passed. Now what they want is original ecology, not cheap prices. When we first arrived and wanted to have a ham and egg sandwich, the price was like 12 Yuan each. The backpacker would ask, "How much is it without ham?", "How much is half of it?" or "How much is it without all the other things?" we felt so grateful to the foreign backpackers for they've introduced Yangshuo to a lot of people from other places. But we need to know that small loss of the backpackers, the low consumption customers will not be a big problem for us. In fact, what we need is only one person's income and consumption level to get to a certain point. For example, one rice noodle store sells rice noodle at 4 Yuan each, which is acceptable for everyone. Then if there's another store sells it at 1 Yuan each, no one would want it. You can go to Lijiang River and Gulangyu, where the hotel culture is lively created, and low price is not needed there at all. There is a popular story in Tourist Administration saying that a customer takes a trip with 5,000 Yuan in his pocket, if he spends all his money he would be very pleased coming home. But when he visits Yangshuo, he would have 2,000 Yuan left after his trip. Do you think he is happy? Definitely not.

Lu Huaping: There is no way to spend the money.

Huang: Therefore, if I'm going to run a restaurant, I prefer quality to quantity. Unlike the restaurants downtown, what we make should be something more exquisite, with better materials and

services but less quantity. The tourist may only order three dishes with a couple of friends. If these are not enough he will order three or four more and feel delicious. Someone will be upset if he's not able to eat up. He will be like, 'why there's so much of it and you didn't tell me? I can't finish this and I won't pay for this!'

I think doing business in tourist district, like hotels or restaurants is different from that in the downtown. I've been in this business for more than ten years and I have some experience. For someone who invests in tourist districts, do not afraid that you don't have experience in doing this before. You need to think in the perspective of customers. Imagine that if you were a customer with 50 Yuan, would you try to save money or what. Use the reverse thinking. That's my personal opinion. As for the tourist environment, I'd like to point out several points, which are very serious compared to other places in the county. These are noise, pollution, the public toilet and selling without valid license. Solving these problems can make a good tourist spot. Dali, Lijiang River and Gulangyu are all good examples although the environment in Gulangyu has deteriorated now. Mr. Huang, our businessmen are all suffering. If you complain to the department A, it will ask you to go to department B, to pass the buck. When we complain to Tourist Administration, the people there say that they are not responsible for that and ask us to go to the municipal administration. Then the municipal administration makes you to go to the Environmental Protection Bureau. Then the Bureau is like, 'it's none of our business. You need to go to the urban management unit'. The urban management unit keeps making you go to the police station. Therefore, if we want to solve the problem, we have to improve the administrative capacity. It needs constant efforts to make it work, not just for a month or something. In spite of what I've said, I agree that the noise issue is not so serious as before. The rule seems to say that all the activities have to finish before the midnight. But rule in Lijiang River seems to be 11 o'clock, right? But I live in a hotel room in West Street, and the noise is acceptable. After all these years of suffering and efforts now we can see the first step of the improvement. The second step is to solve the problem of selling without valid license, then the trash can and public toilet problem. Mr. Huang, you see, you've made great efforts to promote the amazing scenery and convenient caravans. But when the tourists arrive, they can't even find the toilet. Even if they do find the toilet, the sanitary condition is still a big concern. This is the most important thing. I've even seen some public toilets with air conditioning. There are many public toilets in Gulangyu. These toilets are free and there are people in charge of the sanitary situation of them. The situation in

Lijiang River is even better. The toilet in Lijiang River is equipped with automatic lights and sofa, and the sewer system will dispose the waste harmlessly. Later on I contacted the manager of the company producing the toilet facilities and she told me that they had received subsidies and management fee from government. I felt so astonished. I really dropped my jaw. That was such a good thing.

However the question is, even if we've spent a lot on the toilet, after the visit of the supervisors, parts of the facilities will soon get broken or missing. The explanation is that someone has stolen them, which means you need to keep watching them, right? The tourism can't improve without all the work. As for selling without license, it causes unfairness to many restaurants and other sellers. You can put these vendors together, right? Just like what they do to the noisy bars in Lijiang River. It sure takes time. Now the county government is moving into the new district of north, which is also a good method. We can give three or even five years for the transition of West Street. We have to be reasonable. Since the merchants have spent money on the rent and decoration, we can gradually move those shops to the district. If the government can help to improve the environment, our investors will not only bring the money, but also bring our friends here. Usually when I talk about business with my friends, we all feel pity for Yangshuo for it has fallen behind. It is such a great place. I have been here for 15 years since 1999. I'm willing to answer all the questions raised by all of you. It would be helpful for your paper and everything else. I keep thinking that Yangshuo is a very good place. There are still a lot to improve.

Sun: What makes you think that Yangshuo is a good place?

Huang: Like rock climbing and the Yulong River. These are all very convenient tourist spots, right? Besides the high-speed rail, taking the boat can be very convenient. Plus, from the perspective of the foreigners, the popularization degree of English is higher. I read an article about Yangshuo recently saying that the reader got ripped off and spent over 3000 Yuan in Yangshuo. There are some complicated problems discussed in this article. I think compared with other places, Yangshuo is not a place that would cheat the customers.

Lu Huaping: Specifically, the place mentioned in that passage is Guilin not Yangshuo, though Yangshuo is a part of Guilin.

Huang: However, Yangshuo also has the same problem. Nearly 90% restaurants of Yangshuo use similar menus, which means that they offer similar services.

Lu Huaping: The other places of Guilin are more serious in this problem. Tourists are usually induced to a place and cheated by tourist guides, which is not common in Yangshuo.

Li Sha: Yes. The local people of Yangshuo are more truthful than those in other places of Guilin. I did not want to raise the price at all. For those foreigners who seem poor, I may feel sorry to receive money from them and refuse to have tips. Most local people of Yangshuo are that helpful and kind!

Huang: I have the same feelings. We all want to be thoughtful and improve our services.

Sun: However, not everyone in Yangshuo behaves in that way. The situation becomes worse in recent years.

Huang: I understand what you are saying. Now we can find so many tourist guides without professional training and a license offer their so called "services" in Yangshuo.

Sun: Days ago I encountered two girls standing in the portal of West Street, with a banner "Safeguard Diaoyu Islands". What are they doing? West Street has nothing to do with safeguarding Diaoyu Islands.

Lu Huaping: It's a stunt that two girls earn money from tourists by taking photos with them.

Sun: How can we regulate the orders and eliminate these phenomena?

Huang: Just as what I said, solving this kind of problem requires both our cooperation and Tourism Bureau taking certain measures. We need to report these problems to leaders in the government.

Sun: I have made an appointment with the director.

Lu Huaping: Then you can report the problems discussed on our salon today.

Huang: Yes. It is a really good chance. However, we need not get the approval of our government officials before launching a program in most cases. For example, the outdoor programs by Xi Tang haven't got any support from the government and also have a good result. In other words, if our programs succeed, the government will seek to support us.

Lu Huaping: We can develop the program into a certain scale and then ask for the support of government.

Huang Jialei: We can think of many preferential measures. For example, we can offer two free accommodations to those who booked two days. With that, many tourists would come to our Yangshuo and stay longer, which will definitely boost our business.

Zhang: I am sorry to interrupt. Some practices are encouraged, like media promotion and online tourist information supplier. For example, on guests' birthday, Guilin develops a stunt for free rooms in hotel and birthday gifts. Yangshuo can also develop towards this direction.

Huang: Actually, what you told is just I talked about before. It is different to business in Yangshuo and other cities and what you mentioned can be done inside the cities.

Lu Huaping: We want an activity involving lots of people. We want an image project.

Huang: Yes, if your business is the largest in Yangshuo, you need to benefit everyone. Originally 50 businesses shared a cake. Now the cake becomes bigger, even if your business share becomes 3% or 4%, the amount is much more than the previous one. Therefore, this business can run better. There are few characteristics and boutique hotels in Yangshuo. In fact, Roland and Ian, they run hotels outside Yangshuo. Yet I don't. In fact, you can open up the chain for at least ten joint hotels for promotion, OK? Then, you feature every restaurant with a theme. Which country are you from?

Ian: South Africa.

Huang: Then you can sell South Africa dishes and he can sell Dutch dishes. You can form a coordinated manner online as efficiently as possible. You can offer a leaflet for promotion, recommending him to another hotel for dinner with support in transportation. You can be agreeable. This is mutually beneficial. Tourist go to (the other owner) restaurants for his meals and he will definitely go around the rooms. Through cooperation, the restaurant can certainly run well. In a very casual environment, where he stayed for four days, he can go to four different independent restaurants. Yes, you can get a healthy joint so as to win the heart of the guests.

Roland: Cooperation.

Huang: Yeah. Cooperation. Though we are having competitive relations, we should cooperate with each other and greatly improve our profit. Someone is responsible for online promotion; someone can focus on serving foreign dishes, while the others may concentrate on room services. I don't think a cutthroat competition benefit all of us. We should not trigger price war. This year the

number of the tourists is not stable. In my view, there are mainly two reasons. The first reason is about weather. In fact, the weather of Yangshuo is not that bad as the report of CCTV. However, many tourists canceled their travel plan to Yangshuo after watching the TV report that Guangxi this year will suffer from lots of rains. Since Yangshuo is a part of Guangxi, our business has been greatly influenced. Though Yangshuo has much more rainy days than last year, it is not that serious as the report said. The second reason is the financial restriction of the government. That's why our business this year is not as good as last year's.

Roland: I admit that our businesses has turned worse after 2011. Apart from factors you mentioned, I think we are going through an adjustment period of our business.

Sun: However, the total number of tourists is growing.

Roland: Yes. The number is bigger year after year, but most of the tourists only stay in Yangshuo for one night. We cannot make a lot of money.

Lu Huaping: In addition to a short duration, many other places of interest in Pinglu and Lipu are developing quickly. After the completion of the expressway, more tourists will choose to Pinglu and Lipu rather than Yangshuo. Some reports said that nearly 120,000 people travel to Yangshuo one day, but it is not the truth.

Huang: So what is your opinion about the reason of the retrogressive business?

Roland: I have a lot of thoughts. I'm sure that every one of you would have a lot to say if you were given three days to write about hundreds of problems in details. There are many problems, which are all small ones. What William said happened before 2005, when there were like millions of foreign tourists visiting here. They want to work with someone like you who can speak English. You've learned English and improved your abilities. Your service has higher quality. You understand what the customers want, so you become rich. What was Yangshuo back then? It was a platform instead of a place with mountains and rivers. It is the feeling that satisfies the customers. I got to know a shopkeeper after two or three visits. Then we became friends and sent emails. Two years later I would visit him again. After 2005 I felt that the platform was lost. The feelings were gone. What I want from a tour is to feel happy. I want to take my family to enjoy ourselves and relax since I feel stressful when working. If the place I visit cannot give me pleasure, or the price is not reasonable enough, I won't go there any more. Every Chinese wants to go to Hangzhou, Lhasa, Yangshuo and

Italy. But after one trip, there will be no more. That is a big problem. They feel nothing. What they want is to take photos to show to friends after they go back and never come again. If we want to develop tourism in Yangshuo, we need to recover the feeling. I can also be a tour guide. We have the certificates although we haven't learned anything about tourism. We can lead the way for the customers and make some money. But we don't know what they want and cannot provide the service they want. It's all about making money. So many customers would feel bad and deceived by some tour guides, restaurants and hotels. They feel that all they do is eating and drinking and they don't want to go to Yangshuo anymore. The biggest problem is the loss of feelings. Sam just brought up the toilet problem in details. When I do business here I can feel that the government does not care about it after it gets the money. It is just like the tour guide thing that I just mentioned. As long as they get the money, they won't care about what things would turn tomorrow. But Lisa and William, we all see things in the long run. We understand that the contract period is 30 years and I want to make money in five years. It's just like you sending your children to the primate school, hoping them to attend a university in the future. If you only see things in the short run, you can't provide good feelings to the customers! If some customer in the hotel is not pleased we won't charge him. And if you want to live here next time for free, we can cover that as long as you are satisfied. What we want is long-term business, not negative reviews. We are a small part of the industry with only several hotels. Even though there are eight of us trying to cooperate and improve the quality and service here, we are still a small part. Yangshuo is still not good enough. You come to Yangshuo to do the survey, and you don't even know why we're here and what we're doing here. When I ride the bike, there are trucks all around me making noise. Although I feel upset we can do nothing about it. We all hope for the best but we can do nothing. We don't know who the county director and the secretary are, let alone people from Tourist Administration. Even if we do go to visit the secretary, several years later there will be a new one.

Roland: That's the case. We should understand our tourists, no matter they are from overseas or domestic. If we only focus on making money, tourists will have a bad impression on Yangshuo and never travel to our place again. On the one hand, we should learn from Sam by caring about the details of our service. On the other hand, we should set up an ultimate target and overcome all the difficulties in achieving it.

Sun: Can you be more specific on the target? I mean, what is the solution for problems?

Roland: Just as what Mr. Huang said. I am not the leader. We need support of the government. In addition, we need to clarify the procedure of reporting. I hope that our children can have a beautiful Yangshuo rather than a waste yard. We need to take measures to solve these problems we discussed today.

Sun: Actually all of you are earning less money than before, while the number of tourists is larger than ever.

Roland: Yes. Many tourists did come to Yangshuo, but they did not spend any money.

Sun: The person-time is growing, but the consumption per captia is lower than before. The positioning of Sam's hotel is high-end consumers and has a good business volume.

Roland: Sam's business is good at its services. I have heard several tourists complaining the tourist services of Yangshuo and said they would never come back again. If every hotel offers the high quality services as Sam's, I am sure that people would like to take the high-speed rail to Yangshuo to spend their weekend.

Sun: OK. We will talk about this later. Who would like to talk about other problems?

Former Director: I have heard an idea yesterday. It is "the helpless guide and the guide's helplessness".

The boss: As we mentioned just now, the tourist guides have no other choices. Indeed, all the elements are connected to one another. According to Mr. Huang, they are supposed to run a licensed operation. What's abnormal is that they didn't join the travel businesses as professionals. That is to say, I started my tourist business in 2000, when there were only 2 travel agencies in Yangshuo. In the beginning, Yangshuo International Travel Service was registered in Yangshuo. Only after it was sold to the travel agency in Guilin it was able to survive. We didn't have any official local travel agency here. But since we came to Yangshuo, things have changed. At first 2 travel services lived on travel agencies in Guilin. Up to now, everyone tries to work in tourist industry. In fact, more than 40 travel services were unlicensed. In 1993, the Yangshuo government made an effort to keep the tourists accommodating in Yangshuo. But at that time, the Guilin government was very aggressive. Those who visited Yangshuo must accommodate in Guilin. How did they assure that? The Guilin government set down the plate number of each vehicle traveling from Guilin to Yangshuo. The drivers would be fined if they didn't drive back to Guilin at night, so all the vehicles were forced to go

back. Afterwards, thanks to the efforts of Yangshuo government and veteran cadres, hotel industry began to develop. In the past, the roads in Yangshuo were surrounded by fields rather than small restaurants as we can see today. Yangshuo Restaurant, the Xilanshan Restaurant, which has gone through a reform lately, along with some small hotels were considered the top hotels here. However after the accommodation was permitted, private hotels emerged like mushrooms. It was in 1997, the year in which the New Century Travel Agency was founded.

Li Sha: At first it was extremely tough to get the permission. It took 3 years for us to obtain the foreign tourists' permission.

The boss: Whether the tourist industry faces the foreign market is not so important. The first thing is to attract the tourists here in Yangshuo. It is the accommodation of tourists that stimulates the local economic development. To attract more customers, we had special hotels with a variety of facilities along with more than 40 tourist service departments. After 2002, when I was working as President of Travel Services Association, there were 38 travel service departments and one travel agency. But afterwards the travel agency broke down because of internal reasons. It couldn't survive! The boss, tourist guides and the travel agencies were all helpless.

Zheng Jiang: In 2002, Xinjin Travel Agency was the only travel agency in Yangshuo. But later on it was eliminated. The bosses were helpless, so did the tourist guides and the travel agencies. After Yangshuo was developed into a tourist attraction, many hotels and tourist agencies were established. And most of the local people joined the tourist industry. If tourists see adult women from all directions, who just finished planting in the morning, with muddy legs, it gives them a bad impression and affects the quality of tourism. Can local residents show local characteristics? No! What they want is money, regardless of tourism. Their job is done after showing you around. There's a question about why Xinjin Hostel pass? They swarmed from all directions and shared the guests one by one, giving no space to travel agents. I am quite overbearing in protecting my agent. With a shop in parking lots, others fear to come closer because I'll beat others up (laughter).

It is what I feel running tourism here. It seems that residents here are all engaged in tourism activities regardless of travel agencies. Regularly the whole tour charges 10 Yuan in travel agencies. Some residents mess the regular business with cheaper price, 6 Yuan. Travel agencies and some local residents are all operators. But travel agencies have formal business licenses and need to rent land.

When it comes to rent, everyone gets a headache. Nothing in Yangshuo is more expensive than housing rent. Everyone has difficulty tackling that. The high rents, water and power rate, staff wages, which are inevitable, must be in my list of running a business.

As I mentioned before, it seems that all residents carry out tourism activities. They plug the plants in fields in the morning, then they got 5 Yuan for a bowl of noodles after guiding tourists. If no guests are available, they go back to planting without any lost. Here again the same problem, if we are determined and persistent, we can keep our business. If not, the agency closes down, one after another. That is why Xinjin Hostel passes its business. It is also beneficial because of Mr. Liu. Anyway if I am wrong…

Liu (director general): You can also talk about the situation now.

Zheng Jiang: Difficult. Yangshuo Tourism Administration issued a certificate, a tour card, I have questioned why it set the card. I explained they have no such qualifications in tour guide management. Later the people concerned explained that Yangshuo is a large tourism city. This is a card for the qualification of guidance and introduction. Oh my god. Such a certificate, got by guides, offers a normal cover for immoral behavior.

Huang: This is a rogue certificate.

Zheng Jiang: He who owns that certificate has no boundary of service. For example, mineral water and phone are two separate businesses. He won't care about that. He manages all businesses together: local-guiding, house selling, travel tickets booking and aeroplane ticket booking. He served as a qualified travel agent, tour guide, tourism fleet and catering provider. The access of the certificate is great, great enough to express our helplessness. Unprofessional guide is their real name. But the government asks us not to call them like that. They are local tour guides who are leading the way. Then what should we do? Our travel agencies submit at least 300,000 cash deposit to the regional tourism bureau. My agency needs to pay the rent, and I have a normal business license, while he has nothing but a card. I have learned that the card charges for about 400 Yuan (laughter), required and free for annual inspection.

Mr. Liu (director general): Yes. Tourist Administration messed the market up. The service is unprofessional.

Sun: How many certificates have been given out?

Zheng Jiang: More than two to three thousand.

Mr. Liu (director general): It causes chaos in the whole county.

Sun: But what I see now is not just a certificate issue, all people are involved in tourism.

Zheng Jiang: Yes. Now without test I can also guide.

Sun: This morning when I went to Early Paradise, there may be 20 people rushing to a car the moment it stopped.

Zheng Jiang: That is another case (response from crowd: Flying Tigers, comment: awful) Tourist Administration doesn't punish it until now.

Sun: You can fight if you are strong. What if you are weak?

Zheng Jiang: Next, the market. Galloping vehicle is different from Flying Tigers. Each of them are in charge of two separate districts. From Yangshuo highway to Baisha and high-end hotel gates, they are clear about the division of area. They accept all the guests. Then, they chase for other guest. When the guests went to a strange place, the galloping vehicles swarm together. If the guests do not follow them, they will even threaten the guests.

Liu (director general): This phenomenon can be ignored. It is better to study other issues.

Sun: This phenomenon can't be eliminated in a short term. What do you intend to do under this phenomenon in the future?

Zheng Jiang: It is possible to be solved. For example, there are also tourism practitioners in Guilin. Once they meet the guests, they introduce them to the travel agency, which at least is a normal practice. In fact, we can learn from Guilin.

Sun: Tourism practitioners lead tourists to agency, right?

Zheng Jiang: Yes. They have this operation. It is possible.

Sun: Regardless of outer pressures, is there any inner transformation for your breakthrough in the future?

Zheng Jiang: In the past individual tourists account for 30%, while team tourists 70%. After the release of Tourism Law, the proportion reverses, with individual tourists close to 60-70% and fewer team tourists.

Huang: Right, we can perceive the problem through comparison. A serious problem is complaining... It is true if there is any problem of the products, the buyers will return the shop complaining, like 8888. The unprofessional guides gathered at restaurant gates, waiting for guests and cheating them. Or if they go to other places, they are able to trap richer guests.

Zheng Jiang: After the release of Tourism Law, we are restructuring our travel agency to online tourist information supplier. Tourists do not request conventional routes anymore. We are designing comfortable and appropriate routes for couples and families accordingly. So this is the difference. We have been doing this for a year. I had talked about this issue before. At the beginning, the tour guide market was a chaos. I also drill the tourist loopholes by involving in the ticket system. I can charge a certain fee once they bring the guests after competing with others, and the rest profit is theirs. I drill the tourism loopholes. At last we are able to establish a website. We set routes in several large travel websites. We always serve our guests appropriately and design well-organized routes.

Sun: I become more relaxed...

Zheng Jiang: But there is still a problem in bringing the guests away. To put it simply, we will not let them pass the West Street after visiting Impression on Sister Liu.

Sun: Once passing the West Street, they are not your targets anymore.

Zheng Jiang: Yes, then I will waste my time for missing them.

Sun: Yes.

Zheng Jiang: Now we are in a transition period. Then we can run business as a small team…

Sun: Yes, because then you…

Zheng Jiang: My idea is that such conventional tickets should be canceled in Yangshuo. It caused trouble, don't run our business in that way anymore. I have also been designing several dedicated traveling paths.

Sun: Customized, and personalized path.

Zheng Jiang: Dedicated traveling paths are promote a package of tourism, including tour of half a day, one day and two days.

Sun: Right.

Zheng Jiang: Now I'm promoting Early Paradise, Lijiang River, etc. …

Huang: Dedicated traveling paths.

Zheng Jiang: we have manage well in dedicated traveling paths, together with Impression on Sister Liu, we will pack and sell them.

Sun: But you still need your guides, right?

Zheng Jiang: Yes.

Sun: I am very worried that in the drift, if you don't guard your guests, your guests will be harassed by unqualified tour guides painfully. Is that right?

Zheng Jiang: In fact, that's for sure …

Huang: Don't worry. All can be solved by guides.

Zheng Jiang: Now the taste of Yulong River culture and style has changed (Sun Jiuxia: When We floated, ate and took photos, right?)

Huang: You have to handle it.

Sun: Sure.

Liu (director general): … the business group invited, could you make a speech? You can talk and share your opinions in the discussing section.

Sun: I … I have no opinions. What about others …

Mo: After listening to what they said, I feel necessary to talk about my opinion. One of the problems of Yangshuo tourism is that tourists cannot find the exotic feeling at Yangshuo. It reminds me of the situation in 1985 when the first foreigners went to Yangshuo. Once we went shopping at the market, we heard someone bargaining in Yangshuo dialect. Yeah, that was Yangshuo dialect. However, when he stood up, we found that he was a foreigner with a prominent nose and blue eyes. I've talked about that on a program *The Cities of CCTV*. At that moment I was suddenly asked why did foreigners love Yangshuo and I lost my tongue. We had never talked about what did foreigner like about Yangshuo and how did they feel about Yangshuo. Yangshuo was a small and quiet town in the East with a slow pace of life. That was what they felt. But as the whole China develops and gets into the 30th year of the reform and opening up, it becomes a time when people look at nothing but money.

It's embarrassing. That's why President Xi Jinping puts forth the idea of Chinese dream. Xi's reflection on China Dream represents exactly his willing to pull the carriage of China back to the normal way. Chinese people should be upright and refuse to look only at money. We can see that the development of China has gone down a wrong path, so did Yangshuo. What Roland said is right, we can find out any small problems, we can write down 30 problems about Yangshuo in the past, but how to take actions is a big problem. Then we turn to the government. However, as you can imagine, after 30 years of reform and opening up and when people are pursuing GDP, it's hard for the governments to give up GDP for something vague. It can be said that what's vague is the friendly feeling Yangshuo gives to the tourists. Turning to something vague, to pure service, is a great challenge for many governments, including the government of Yangshuo. At present, I don't think the government can overcome the challenge. Half year ago when the government was looking for candidates for the director of the Yangshuo Tourism Bureau, I was consulted. After a few words, I asked whether they would like me to be the director. The answer was yes, and I was then asked to talk about my opinion. I refused. I had worked as a deputy director in charge of reception at the municipal party committee office. And later, I had worked at other departments, from personnel bureau to poverty relief office. At the moment I was working at the art and literary association. With only 15000 Yuan of fiscal budget per year, it can be listed as one of the poorest department. So it was really a great opportunity for me to thoroughly change my life. My reason was that I could not guarantee that Yangshuo culture could give enough support to its tourism if I worked as the director at Yangshuo Tourism Bureau, but if I worked as the chairman at the literary and art association, I could try my best to support Yangshuo tourism by its culture. It's also what I prepared for a speech yesterday. How the local culture supports its tourism is the way to bring back the feeling Yangshuo gave to the tourists in those years. On March 14, 2014, there was a No. 10 document of 2014, Some Suggestions to Promote the Integrative Development of Cultural Creativity and Designing Service, in which improving the cultural connotation of tourism development was listed as one of the recent key tasks. However, after the release of the document, I asked whether the tourism bureau got one and whether the government had done something to get it conveyed. Unfortunately the answer is no. Why not getting it conveyed? Cultural promotion should at least involve us who are working in the field. Why not getting it conveyed? Because the government has no idea to take the first step in this regard. Everyone is talking about money, economy and the number of tourists. The number of tourists visiting Yangshuo

last year reached over 10 million. We all know what does this 10 million means. Everyone is chasing after something blundering and superficial. Put it directly, it's something about the government's achievement. We can't expect the government to bring back the feeling for the tourists and operators, and must wait at least until the next government. As Prof. Bao stated at the conference for core development of Guilin, that Guilin doesn't lack tourists, and we know that Yangshuo also doesn't lack tourists. As I said just now, many tourists who come to Yangshuo, and, like tourists visiting other places, are willing to spend money. Consumption is a good thing, but the problem is that businessmen in Yangshuo are just like the fancy carp in the ponds in the park. They open their mouths waiting for the money in the tourists' pockets. Once a car stops, businessmen swarm around it. As what they mentioned before, what the businessmen see is actually the money. After they're paid, the tourists become nothing to them. It's true that we have to make money from the tourists, because without money tourism cannot develop. Then how to make money? To give the tourists a positive impression to make people feel that Yangshuo is worth visiting, we can also make it convenient and safe to travel in Yangshuo and make people in Yangshuo more confident. Another thing is the shopping places which make tourists willing to spend their money here. When it comes to culture, I think it's rather easy to copy. As you can see, in order to develop tourism, many places build up some pseudo-lore like stilted buildings, with which tourism can be developed. Those are things that can be copied. What cannot be copied is the image and feeling of a place. A person comes to Yangshuo because of his own idea and feeling. That's exactly what we have to look forward to. Without personal feeling, money is spent with nothing in return. If so, I don't think tourists will choose to travel to such a place. How can Yangshuo distinguish itself from other places? Through its culture. Yangshuo is characterized by its culture that came into being over 1400 years ago. In addition, the currently developed landscape culture and culture of mid-west China are worthy of exploration. The culture of Yangshuo is ever-changing and is the integration of culture of local residents and that introduced by people from outside Yangshuo. About thirty years ago, no such culture of mid-west China could be found, but now it has become one of the characteristics of Yangshuo. Put it simply, the development of Yangshuo in the past 1400 years was a process of assimilating external culture, which give people an impression that Yangshuo people are friendly. Many of you here today are from outside Yangshuo. You will also enrich the culture of Yangshuo. Under such a circumstance, Yangshuo people present a prominent characteristic of integrity and inclusiveness, which can be taken as the mainstream of Yangshuo

culture. The development of Lisa's Hotel, Rosewood chain stores, MaMa Moon Hotel, Yangshuo Chef Beer Fish Restaurant, Sister Xie Hotel, Sons of West Street Hotel and other projects in Yangshuo are examples of moving close to integrity and inclusiveness. Lisa was a women selling pickle at the West Street. In 1983 and 1984, backpackers holding a Lonely Planet came to Yangshuo, and they turned to Lisa for help. We usually turn to the police, but the tourists in those days turned to Lisa for help. It was believed that once they got to Lisa, whatever difficulties could be solved. It is because of integrity, and once promoted, such integrity will benefits Yangshuo a lot. As for particular and negative phenomenon, we have to prevent it from spreading and maintain the positive ideas and behaviors. Prof. Bao once said that if eighty of a hundred people were civilized and trustworthy, then the minority would find it difficult to be treacherous. If people advocate an atmosphere of integrity, 30% or 20% of people, if not all, will become trustworthy. That's what I want to say.

Sun: It's indeed an evident phenomenon, and issues of immigrant culture as well as Chinese and Western Culture. In fact, many people in Yangshuo are immigrants, and there's now a group of experts studying tourism immigrants. Tourism immigrants come to Yangshuo not only for work, they actually immigrate to Yangshuo, saying that they love the lifestyles here and run business in Yangshuo. I believe the same is true for most of you. Now let's welcome Director Zhou.

Zhou: Prof. Sun has long been our friend. You, together with batches of students, have done this investigation for a long time. I have been in Yangshuo for 26 years, and witness the development of Yangshuo tourism from the very beginning. I would like to thank all the students attending the meeting today, especially the support of Sun Yat-sen University to Yangshuo. Prof. Bao has followed the development of Yangshuo for over ten years, and our plans for Yangshuo tourism are outcomes of cooperation with Sun Yat-sen University. Dr. Sun and his students are the first to start the investigation, so many of their conclusions may be out of date and it's necessary to edit and revise the original versions. Yangshuo has been developed for many years and its tourism has been developed since Deng Xiaoping and Prime Minister of Canada visited Yangshuo in 1973. The early tourists to Yangshuo were backpackers, and foreigners, and tourism publicity was started among foreigners. That's why we say, as discussed with Dr. Sun before the meeting, that Yangshuo is the cradle of China's rural tourism. It's been forty years. Now we have to think about to what extent does Yangshuo tourism has developed to. Even though Yangshuo has been awarded various titles, such as "an excellent tourism county in China" and "a model county of tourism in China", among other titles

awarded by the World Tourism Organization. However, we indeed still have many problems. One problem we have to explore now is how to realize transformation and upgrading. I hope that the professor and the students can help define the direction for the development of Yangshuo tourism. In last symposium, we invited experts, scholars and fellows to inspect Yangshuo for existing problems. We should not be arrogant and conservative because Yangshuo is a famous tourism county. The award has no implication for being No. one. According to what I know, I feel that the major issue of Yangshuo is related to the integration and reuse of tourist resources. Tourist resources in Yangshuo are scattered and governed by different departments, unlike Jiuzhaigou Valley, the Thousand Island Lake and Mount Yellow, large scenic spots carrying out overall promotion.

This is the core issue I propose. Another issue is about resource integration and reuse. How to integrate resources? In 2007, we raised the same question with Guilin when the problem of bamboo rafting in Lijiang River was being discussed. It costs only about 200 Yuan from Guilin to Yangshuo along the Lijiang River to fully leverage the function of the river. The same is true of Yulong River. As for the tourist resources of Yangshuo, I'm not going to talk about the tourist infrastructure. At present, the worst problem is about transportation. Such problem may be solved after the opening of the tunnel. There are also other problems that still need to be settled, including the roads at the county, the improvement of Yangshuo's image, pedestrians at Guilin City. These are the existing problems I want to share with the students. (The speech was terminated due to time limit.)

Huang: I feel much honored to be here to attend this salon, with tour operators, some senior leaders and tourist experts from Yangshuo. I come here for learning, and from what you have said just now, I have really learned a lot. I strongly agree that it is of many difficulties for Yangshuo, a county-level city in China, to go so far. Now, it is well-developed and leads the county-level cities. Here, I will not repeat the advantages of Yangshuo's tourism. As a tourist administration or an administrative department, our goal is to provide more and better service for all of you. Not only do we carry out what the policy requires, but also we ourselves are willing to serve, and this is why we think it is better to name our department the department of tourist service. And personally, I also hold that our administration system should not only be from top to bottom, but also from bottom to top. We can also set up some associations. In Yangshuo, we now already have associations like hotel industry association and tourist service associations, but the communication among these associations and

between our departments is far from enough. Thus, in the future, we should hold more such meetings so as to know more about your opinions when making tourism policies and other decisions. We have always talked about the standardized tourism management in Yangshuo, and one important aspect of this is the tourism supervision. With the supervision, we can do much better. And the supervision refers to both the supervision from the bottom to top in our department and the effective supervision from the observation point in Sun Yat-sen University. Roland, our distinguished guest from Holland has given us lots of suggestions just now, and what he has said is what we should improve, that is to provide good and more efficient service. Yangshuo is said to have become an ideal place for leisure vacation but we know it is not a complete truth. We still have much to do in improving the low consumption level of tourists, the protection of their legal rights and so on. In a word, there is still a long way for Yangshuo to go and we will spare no effort to develop the tourism. Thanks.

Sun: Thank you very much. At first, I was wondering when to hold such a meeting, because I know all of you are busy with your business during this tourist season. Therefore, I feel very grateful for your sparing time. We should have discussed for a longer time, but we have to stop here. For me, I have learned a lot today. Actually, a few days ago I was very pessimistic. You must be wondering why. I am sort of a fan of Yangshuo and twelve years ago, I went to all the 20 villages near Yulong River. Yesterday, I paid a visit to Old County Village, especially to the courtyard. 20 years ago, I once had a meal in the courtyard, and yesterday, when I came to there, I found no changes but some more foods. I observed the changes all along the way and in the West Street. However, what I have seen is not what I expected. There are no better changes; instead, it is in a mess, with various items from different places and from different periods mixed up. This phenomenon worried me a lot and I was even confused about the future of Yangshuo. I thought whether there is a bright future awaiting Yangshuo; and maybe there is a bright future, but it is full of twists and turns. But today, I am of much confidence. Thankfully, I have all of you here. Everyone here reflects and has done a lot, for instance, the two foreign friends. What they have done has set up examples for us; and someone puts forward that the problem is not we have done too much but haven't done enough, which is also a warning for us. Actually, for an old house like the courtyard which is meant to leave the historical stage and abandoned by the modern time, I have to pay a lot of attention and money to restore it and promote its value, but such action is meaningful and should be advocated. What's more, what Xi Tang has observed is a true high-end market. Maybe we can't go back to the era of backpacking, but we can

follow the consumption trends, expand its influence and meet the new demands of modern people. In addition, just as all have mentioned, the travel agency needs to be transformed since people now prefer to consume directly. With a decreasing need of the intermediate process, travel agencies are bound to be restructured, and they are indeed being restructured. Besides, I have talked about my criterion to the price. The price lies in the standards and services. As long as you provide satisfying and favorable service, you are allowed to charge a high price. And there are some problems and plights existing in the micro-enterprises, such as the training and the mobility of the personnel, as well as their service standard. Moreover, we have discussed a higher-level problem; that is about the culture. Originally, Yangshuo mainly boasts of its natural scenery, such as the mountains and rivers. But now we began to promote local culture. We add the scenic spot like Impression on Sister Liu. Although it belongs to the creative industry, it is also a scenic spot of human and culture. Yangshuo is a place integrated with both eastern and western culture. Here, "integrated" doesn't mean a quick nodding. For foreigners, they live here and speak mandarin, Guilin dialect and Yangshuo dialect, and their decedents also speak local dialects. This is integration, and this is something good. But, what's the nature of the integration? Must you wait for the officials to take actions? Yes, you can demand them to take certain actions, but what if they don't take? And maybe they will take actions, but they may leave Yangshuo after two or three years because he can pursue development in other places. But for you? Yangshuo is your homeland, and the homeland of your family and your business. Therefore, you can expect the government for more new plans and new effective measures. And all of us believe that there will be new plans and measures. And at the same time, you should count on yourselves. Just as what we have mentioned, you can set up associations. The association is a kind of industry chain, for example, you can set up association whose business covers outdoor activities, accommodation and transportation or whose business covers only one aspect but in a deeper manner. You can also find a price association to regulate price and a marketing association to help promote tourism products. In fact, there are tourism festivals like Rock-climbing Festival which we have held for years. But can we cover more aspects in the festival through our joint efforts? Because it is also a tough task for the government. To be honest, I have sympathy for the governmental officials because I know their responsibilities. I came to see Director Wang yesterday and I went to all my anger on her although I knew she had nothing to do with this matter. I said a load of unpleasant words which I will also speak out if I meet the head of the County. Then, should we try what the government is unable to

accomplish? Of course we should. We should express ourselves and set up a platform for joint marketing. Furthermore, we can set up association of service. Can we grant waiters a certificate or something like that? Is it possible to offer them some chances for further development? Thus, I think all the micro-enterprises should reach consensus on share various resources for common progress, which will serve as one aspect to make Yangshuo different from other places. The problem is that you are independent from each other and lack cooperation and the opportunity to cooperate. It is the same with Zhangjiajie, which I am very familiar because I also plan for its tourism and so does Huang Mountain. However, I believe there is a great opportunity for Yangshuo because of the spirit it has. And Yangshuo is becoming better and better. However, in my opinion, residents now in Yangshuo are in a hurry and lack easiness and calmness. They lost the easiness and calmness that they owned ten years ago. I have no idea who should be responsible for it. Residents, instead of improving, gradually lost their peaceful mind. Small tourism enterprises have indeed improved, like the Lisa, and some other aspects also have improved but residents have not, which is terrible. Take waiters and village tour guides as examples, they have their pursuits, but all they pursue is to make money, or make the money for the day. As a matter of fact, they haven't improved themselves. What I have seen is that ten years ago one made a living through poling the bamboo raft and today his son or daughter take the same job. But they are satisfied and consider the increase of labor as a good thing. Actually, it is a problem to be solved. And the government should do more to solve the problem. OK, the salon today is coming to a close and I believe all the students have learned a lot. Thank you.

Appendix II: Questionnaires

Questionnaire of Yangshuo Sustainable Tourism Development (For tourists)

Dear Sir or Madam,

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

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

(2) **You came to Yangshuo as:**

A. An independent traveler B. Joining a tour group on your own

C. Joining a tour group with friends or families D. Joining a tour organized by your work organization E. During a conference F. Other _____

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

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

(4) **What kind of information do you want to get? (Multiple choices accepted)**

A. Transportation B. Accommodation C. Catering

D. Attraction introduction E. Costs F. Weather H. Public security

I. Sanitary condition G. Other_____

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

A. Sightseeing B. Leisure & vacation C. Business events D. Official meetings and survey E. Incentive travel of the company and unit F. Religious worship G. Scientific expedition H. Wild adventure I. Photography J. Family & friend visiting K. Festival activities M. Knowing about culture and cuisine N. Other _____

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

A. by train B. by air C. by coach D. by car E. by boat G. Other ___

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

A. by car B. by bike C. by taxi D. by boat E. by sightseeing tour bus F. On foot G. Other ____

(8) How long do you plan to stay in Yangshuo?

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

(9) Where do you live during your stay in Yangshuo?

A. Family hotel B. Youth hostel C. Star Hotel D. Other ___

(10) What's you **travel budget** per person? **(only your costs)**

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

(11) Which impresses you most?

A. Natural scenery B. Unique humanistic feelings C. Recreational atmosphere D. Hospitable people E. Climate F. Local architectures H. local guides

(12) You are going to visit: (Multiple choices accepted)

□West Street □Lijiang River □Scenery on the 20 Yuan note □Camel crossing the river □Butterfly Fountain □Totem Ancient Trail □Jianshan Temple □Big Banyan Tree □Yulong River □Moon Hill □Longjing River Drifting Resort □Yangdi Scenic Area □Peach Resort □Fuli Town □Other_____

(13) What kind of shops in West Street interest you most? (Multiple choices accepted)

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

(14) What kind of products have you bought in Yangshuo? **(Multiple choices accepted)**

A. Ethnic costumes B. Daily items C. Handcrafts D. Modern clothes E. Special food F. Creative products G. Nothing H. Other_____

(15) What did you buy those products for? **(Multiple choices accepted)**

A.Travel necessities B. Souvenir for yourself C. Gifts for friends and families D. Proper price E. Original design F. Recommodationm from friends H. Salesman persuasion I. Other_____

(16)Does Yangshuo meet your expectation?

A. Higher than B. Exactly D. Lower than

(17)**Will you visit Yangshuo again?** A. Yes B. No C. Not sure

(18) **Will you recommend to Yangshuo friends or relatives?**

A. Yes B. No C. Not sure

(19)Have you watched the performance "Impression on Sister Liu"?

A. Yes B. No **(please jump to question 21)**

(20)What did the performance "Impression on Sister Liu" **impressed you most?**

A. Stage B. Lighting design C. Ethnic costumes D. Dance E. Song F. Liu Sanjie G. Cast H. Other

Are you agree with the following (**tick "√"where you agree**)	**Agree**	**Disagree**
When watching the performance, I paid most attention to the story of **Liu Sanjie**.		
When watching the performance, I paid most attention to the **performance in stage**.		
After returning, I will procure **more information about** the story of Liu Sanjie		
The performance **reveals** the living condition of local residents		

(21)Please draw "√"on the appropriate option depending on you travel experience:

		Strongly agree	Agree	Neutral	Disagree	Strongly disagree
Tourism resources	The scenic pots is beautiful	5	4	3	2	1
	Water quality of Lijiang River is high	5	4	3	2	1
	Cultural landscape has local amorous feelings	5	4	3	2	1
	Cultural landscapes are properly maintained	5	4	3	2	1
	You can get easy access to and good experience in local diet culture	5	4	3	2	1
	Yangshuo's mountains and rivers are the most beautiful in Guilin	5	4	3	2	1
Tourism services	Satisfying souvenirs and gifts are available	5	4	3	2	1
	Ticket price of scenic spots is reasonable	5	4	3	2	1
	Foods are with local characteristics	5	4	3	2	1
	Foods are hygeian and safe	5	4	3	2	1
	Price of catering is reasonable	5	4	3	2	1
	The transportation is convenient	5	4	3	2	1

	Traffic signs are clear	5	4	3	2	1
	Transportation price is reasonable	5	4	3	2	1
	Accommodation is safe and hygeian	5	4	3	2	1
	The price of accommodation is reasonable	5	4	3	2	1
	Service of the staff in accommodation place is good	5	4	3	2	1
	Service of the staff in scenic spot is good	5	4	3	2	1
	Introduction of tour guides in scenic spots is good	5	4	3	2	1
	Recreational activities are rich and colorful	5	4	3	2	1
	Service of surrounding groceries and shops is good	5	4	3	2	1
	There are much similarity in tourism commodities	5	4	3	2	1
	There are counterfeit and shoddy commodities	5	4	3	2	1
	The price of tourism commodities is reasonable	5	4	3	2	1
	Complaint handling is effective	5	4	3	2	1
	Local residents are friendly	5	4	3	2	1

	The environment in scenic spots is clean	5	4	3	2	1
	Air condition is good	5	4	3	2	1
	There is little noise	5	4	3	2	1
	Local security is good	5	4	3	2	1
	There is too much commercialization	5	4	3	2	1
Overall satisfaction		5	4	3	2	1

(22) Do you think it is necessary to provide local homestay in Yangshuo?

A. Yes, and the price is not important as long as it is with local features B. Yes, but it should be cheap C. No, it is not necessary

(23) What's your suggestions to Yangshuo's development of homestay?

_____

(24) Do you think it is necessary provide higher-priced personalized travel in Yangshuo?

A. Yes B. No

(25) What kind of personalized travel do you suggest?

A. Blind date travel B. Family travel C. High-end travel D. Travel for the old E. Adventure travel F. Slow travel G. Other_____

(26) What do you think the focus of Yangshuo's tourism in the future?(Multiple choices accepted):

A. Add new travelling activities B. Exploring history and culture C. Improving service quality D. Improving tourism service facilities E. Improving transportation of the county F. Improving the transportation to other cities

The following questions are about your personal information which is important to the research. Please answer the following questions, and all your personal information will be kept confidentially

1. **Gender:** A. Male B. Female **Place of your residence (Country):** _____
2. **Age:** A.<18 B.18-24 C.24-35 D.35-45 E.45-60 F.>60
3. **Your educational level:** A. Primary school B. Junior middle school C. Senior middle school or technical secondary school D. Junior college E. Bachelor F. Higher than bachelor
4. **Your job:** 1)Government offices or public institution 2)Company, or service industry 3) Individual businessman 4)Teacher or scholar 5) the retired 6)Housewife 7)Student 8)Other _____
5. **Your income per month:**

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

Questionnaire of Yangshuo Sustainable Tourism Development

(For foreign tourists)

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, with a research about the sustainable tourism development of Yangshuo. The result is for academic research only, with no used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation.

Thank you very much for your support!

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

2. You came to Yangshuo as

A. An independent traveler B. Joining a tour group on your own C. Joining a tour group with friends or families

D. Joining a tour organized by your work organization E. During a conference F. Else_____

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

A. Newspapers and magazines B. Internet C. TV D. Travel agency

E. Tour Brochure F. Friends and relatives G. Else_____

4. What kind of information about Yangshuo would you like to get? (Multiple choices accepted)

A. Traffic B. Accommodation C. Catering D. Scenic spot introduction E. Cost F. Weather G. Culture H. Security I. Health J. Else_____

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

A. Sightseeing tourism B. Leisure vacation C. Business activities D. Official meeting

E. Company or unit incentive travel F. Religious worship G. Scientific investigation

H. Exploration I. Photography J. Relatives and friends K. Festival activities

L. Culture and food M. Else _____

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

A. Train B. Airplane C. Coach D. Self-driving E. Boat F. Else ____

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

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

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

A. 1-3 days B.4-6 days C. 7-15 days D. Over 15 days

9. Where do you live?

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

10. What's you travel budget per person? (Referring only to your personal spending)

A. less than 500 Yuan B.500-1000 Yuan C.1001-1500 Yuan D.1501—2000 Yuan E. more than 2000 Yuan

11. Which impresses you most?

A. Natural scenery B. Unique humanistic feelings C. Recreational atmosphere D. Hospitable people E. Climate conditions F. Local building H. Local tour guide

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

A. West Street B. Li River C. Scenery on the 20 Yuan note D. Camel crossing the river E. Butterfly Fountain F. Totem Trail G. Jianshan Temple H. Big Banyan Tree I. Yulong River J. Moon Hill K. Longjing River Drifting Resort L. Yangdi Scenic Area M. Fuli Town N. Else_____

13. What kind of shops are you most interested in? (Multiple choices accepted)

A. Hotel B. Western restaurant C. Pub D. Clothing E. Crafts shop F. Specialty store G. Video store H. Chinese restaurant I. Travel agency, tourism consulting service, ticketing agent J. Foreign language school K. Health care resort and spa H. Else _____

14. What did you buy in Yangshuo? (Multiple choices accepted)

A. National dress B. Everyday item C. Handicraft D. Modern garments E. Specialty food

F. Creative good G. Did not buy anything H. Else _____

15. What is the main reason that you bought the goods? (Multiple choices accepted)

A. Required in journey B. For memorial C. Gifts for friends and relatives

D. Right price E. Novel design F. Introduction of friends G. Guide recommend

H. Shop assistant promote I. Else _____

16. Does Yangshuo meet your expectation?

A. Better than expectation B. The same as expectation C. Worse than expectation

17. Will you visit Yangshuo again?

A. Yes B. No C. Not sure

18. Will you recommend Yangshuo to friends or relatives?

A. Yes B. Not C. No sure

19. Have you watched the performance "Impression Liu Sanjie"?

A. Yes **B.** No（**Please jump to NO.21 directly**）

20. What "Impression on Sister Liu" impresses you most?

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

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

21. **Please draw "√" on the appropriate option depending on you travel experience**

		Strongly agree	**Agree**	**Neutral**	**Disagree**	**Strongly disagree**
Tourism resources	Rich in natural resources, View in scenic pots is beautiful	5	4	3	2	1
	Water quality of Li River is high	5	4	3	2	1
	Water quality of Yulong River is high	5	4	3	2	1
	Cultural landscape has local amorous	5	4	3	2	1

	feelings					
	Cultural landscape is well protected	5	4	3	2	1
	I can experience local food culture	5	4	3	2	1
	Yangshuo landscape tops that of Guilin	5	4	3	2	1
Social services	Food is characteristic	5	4	3	2	1
	I can buy satisfying souvenirs and crafts	5	4	3	2	1
	Ticket price of scenic spots is reasonable	5	4	3	2	1
	Food is healthy and safe	5	4	3	2	1
	Food price is reasonable	5	4	3	2	1
	Traffic is convenient	5	4	3	2	1
	Traffic sign system is clear	5	4	3	2	1
	Traffic fare is reasonable	5	4	3	2	1
	Living in accommodation (residential conditions) is safe and healthy	5	4	3	2	1
	Accommodation prices are reasonable	5	4	3	2	1
	Service of hotel and restaurant staff is good	5	4	3	2	1
	Service of scenic spot staff is good	5	4	3	2	1
	Service of interpretation in attractions is good	5	4	3	2	1
	Rich in recreational activities	5	4	3	2	1
	Service of souvenir shop staff is good	5	4	3	2	1
	Homogenization of tourist commodities /souvenirs are similar	5	4	3	2	1

	Fake and shoddy products exist in tou rist commodities	5	4	3	2	1
	Price of tourism products is reasonable	5	4	3	2	1
	Efficiency of dealing with complaints is high	5	4	3	2	1
Tourism environment	Local residents are friendly	5	4	3	2	1
	Environment is clean	5	4	3	2	1
	Air condition is good	5	4	3	2	1
	Noise pollution is little	5	4	3	2	1
	Local security is good	5	4	3	2	1
	Commercialization is too much	5	4	3	2	1
	The overall l is satisfied	5	4	3	2	1

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

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

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

_____

2. Age: A. <18 B.18-24 C. 25-34 D. 35-44 E. 45-60 F. >60

3. Your educational level:

A. Primary school B. Junior middle school C. Senior middle school or technical secondary school

D. Junior college E. Bachelor F. Higher than bachelor

4. Your occupation:

A. Government agencies or institutions B. Companies or service industries staff C. Individual businesses

D. Researching or teaching E. Retirement F. Housewife G. Students H. Else

_____

5. Your income per month:

A. <5000 Yuan B.5501-6500 Yuan C.6501-7000 Yuan C.7001—8000 Yuan D.>8001 Yuan

Thank you and bon voyage.

Questionnaire of Yangshuo Sustainable Tourism Development (For residents)

Dear Sir or Madam,

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

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

		Strongly disagree	**Disagree**	**No impact**	**Agree**	**Strongly agree**
	Tourism is good to our local development	1	2	3	4	5
	I can benefit from tourism	1	2	3	4	5
Impact on the local economy brought about by tourism						
1	Tourism development has brought more job opportunities to us	1	2	3	4	5
	Being engaged in tourism has increased my income	1	2	3	4	5
	I'm satisfied with my income	1	2	3	4	5
	Tourism industry attracts more investment and spending	1	2	3	4	5
	Tourism development has led to price rise	1	2	3	4	5
	Tourism development has led	1	2	3	4	5

	to increased housing price					
	Tourism has improved living standard greatly	1	2	3	4	5
	Tourism has benefited only a few people	1	2	3	4	5
Impacts on the local society and culture brought about by tourism						
2	Tourism has increased crime rate	1	2	3	4	5
	Tourism has disturbed our former lives	1	2	3	4	5
	I'm limited to use the resources in scenic spot	1	2	3	4	5
	Tourism has improved infrastructure greatly	1	2	3	4	5
	Tourism has improved medical facilities and services greatly	1	2	3	4	5
	Tourism has increased demolition and new construction	1	2	3	4	5
	Tourism promotes cultural exchanges between the locals and outsiders	1	2	3	4	5
	Tourism has strengthened our sense of pride and belonging	1	2	3	4	5
	Local folklore and traditional culture are destroyed and forgotten	1	2	3	4	5

	Tourism has strained the relations between residents and tourists	1	2	3	4	5
	Tourism has damaged moral standards	1	2	3	4	5
	Tourism has increased local festivals and activities	1	2	3	4	5
	More people participate in the promotion of traditional culture	1	2	3	4	5
	Tourism promotes local crafts	1	2	3	4	5
Impacts on local environment brought about by tourism						
3	Tourism has led to aggravated air pollution	1	2	3	4	5
	Tourism has led to aggravated water pollution	1	2	3	4	5
	Tourism has led to more timely and effective garbage disposal	1	2	3	4	5
	Tourism has led to aggravated noise pollution	1	2	3	4	5
	Tourism has led to more solid wastes	1	2	3	4	5
	Tourism has made the community and streets cleaner	1	2	3	4	5
	Tourism has exacerbated traffic crowding	1	2	3	4	5

	Hotel and other tourism facilities damage the scenery	1	2	3	4	5
	Protection of natural environment is important in my opinion	1	2	3	4	5
	I'm willing to provide advice on local tourism	1	2	3	4	5
	Some decisions of the scenic zone incorporate our advice	1	2	3	4	5
	I access to related information about policies and guidelines implemented by the government	1	2	3	4	5

2. What do you think about the satisfaction of tourism development in Yangshuo?

A. Strongly unsatisfied B. Unsatisfied C. Neutral D. Satisfied

E. Highly satisfied

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

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

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

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

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

4. Place of your residence: __ Township /town ___Village

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

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

7. What do you do? _____A. Full time B. Part time

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

8. How much do you earn per month?

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

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

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

Thanks for your cooperation!

Outlines of the interviews with **local residents**:

For local tourism development, what is mostly changed? What's your most concern? What is your suggestion about tourism development in the place where you live? Do you know what sustainable tourism development is? If so, how do you feel it?

I. Economy

1. [vocation] Is there any member in your family engaged in tourism? What is the job (i.e. handicraft, fruit sales)? Is it a main job or avocation? When did it start? How long does the job last? What's the motivation? Is there any difficulty? How did problems brought by government policies and competiveness be solved?
2. [income] Do you have any other income? (Do you have any other economic source of income?)
3. [West Street and commercialization] How does West Street change in recent years? How do you feel about the current commercial conditions in West Street?

II. Community

4. [community engagement] Do you have the right to make suggestions, decisions, and the right of supervision in respect of local tourism development? Do you have the channel to express your own opinions? Does the government pay high attention to the residents' engagement in tourism? (corresponding to the last few questions in the form) How do you want to engage yourself in the tourism industry?
5. [unqualified tour guides] Is there any member in your family who works as an unqualified tour guide? What is the motivation? How did it start? What do you think about this phenomenon? (the cooperation and competition, interest distribution and unspoken rules among the group of unqualified tour guides; measures taken by the government) What is the charging standard? How do you get access to tourists? Do you introduce yourself as a part-time or full-time tour guide? Compared with other jobs, to what extent does tour guide increase your income?

III. Society

6. [social status] What do you think about the gaps between the rich and the poor in Yangshuo? What are the reasons for the gaps? Are you satisfied with your current life? What kinds of difficulties do you encounter in your life?
7. [growth and education] Have you ever learned about English or other foreign language? What is the motivation? Through what ways do you learn it (self-learning, learning in training institutes,

learning through daily communication)? Have you ever taken any training relating tourism? How often do you learn it and how much money do you spend thereon? What the influence of tourism development on your personal ability? In what aspects do you need to improve your tourism participation ability?

8. [marriage] Are you engaged in international marriage? Or is any of your family members of friends engaged in international marriage? What do you think about such a phenomenon?

IV. Culture

9. [culture and communication] Do you keep your cultural features including local costumes, customs and language? Are you proud of that? Does tourism promote your communication with external culture? What do you think about that?
10. [belief] Do you have religious beliefs? How did you get access to that? If yes, do your religious beliefs affect your communication with other people (friends, tourists, etc.)?

V. Environment

11. [land and demolition] Is the land around your house or around you confronted with issues of expropriation? Are there houses confronted with demolition? If yes, is your life affected? Are you satisfied with that? What other measures does the government adopt (compensation for demolition, placement)? Did the local residents have conflicts with the government or enterprises in terms of land issues?
12. [health care] How is your medical security measures? What kinds of improvement are you looking forward to?
13. [environmental pollution] How is the environment after tourism development? Is there any pollution? Does the surroundings become more beautiful? Has the awareness of environmental protection of local residents been raised?

Questionnaire of Yangshuo Sustainable Tourism Development (For owners)

Dear Sir or Madam,

We are from the **United Nations World Tourism Organization**, doing a research about the sustainable tourism development of Yangshuo. The result is for academic research only, and won't be

used for any commercial purposes. All your personal information will be kept confidentially. Please write down the information according to your real situation. Thank you very much for your support!

1. Business Location: _____ Name of Enterprise: _____ Target Group: Residents/Tourists

2. What is your business scope?

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

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

□**Entertainment:** ① Song & Dance hall ②Karaoke ③ Else;

□**Commodity sales or production**: ① Souvenir ② Book and video ③ General merchandise ④ Apparel ⑤ Handicraft ⑥ Specialty ⑦ Else;

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

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

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

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

□**Else _____ (completed by researchers)**

1. Your **products (or services)** are characterized by:

A. Local **B.** Western **C.** Creative services **D.** Else_____

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

3. Have you hired some **employees**? (If not, please turn to Q8)

A. Yes **B.** No

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

4. **Educational background** of the employees:

A. Primary school or lower **B**. Junior middle school **C**. Senior middle school or technical secondary school D. Junior college or bachelor **E**. Master or higher

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

If so, does every employee receive a training course? ____; what are the training methods? ____; what are the training contents? ____; do the employees have a good command of English? ____; .do English skills useful in a recruitment? ____.

6. When did you start your business? ____; how long did you operate? ____

7. Why do you choose here to open a shop here?

A. Beautiful environment for a lifestyle

B. Make a living

C. Else_____

8. Please choose your state of operation.

A. Excellent **B.** Very good **C.** Normal **D.** Poor

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

A. Rental

B. Employee's salary

C. Goods cost

D. Competition from other companies

E. Tourist consumption ability

F. Taxation

G. Policy

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

	Strongly disagree	Disagree	Fair	Agree	Strongly agree
It is **safe** in Yangshuo	1	2	3	4	5
It is a **livable** place	1	2	3	4	5
It is a tourist destination worthy of **investment**	1	2	3	4	5
I'm satisfied with the leisure in Yangshuo in my extra time	1	2	3	4	5

Commercial feature is too strong in West Street	1	2	3	4	5
West Street attraction is declining to the tourists	1	2	3	4	5

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

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

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

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

A. Yes, like _____ **B.** No, but plans to **C.** No, no plans yet

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

15. How do you know about "**sustainable tourism development**"?

A. Very much **B.** A little **C.** Basically not **D.** Not at all

If so, **where** do you get such information?

A. Promotion from the government

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

What do you think of "sustainable tourism development"?_____

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

1. Gender: A. Male B. Female;

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

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

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

5. If you are not a local, where are you from: A. This county **B.** Guilin City **C.** Other parts of Guangxi **D.** Other places in China ____

6. Your educational background: A. Primary school **B**. Junior middle school **C**. Senior middle school or technical secondary school

D. Junior college or bachelor **E**. Master or higher

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

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

Thanks for your cooperation!

Acknowledgement

General Director: Bao Jigang

Technical Director: Sun Jiuxia

Members of Technical Group:

Zhang Aiheng, Wang Xueji, Huang Kaijie, Fu Yulin, Pan Xinjie, Chen Weibo, Li Junping, Wu Sisi, Zhang Jiahui, Wu Mingxin, Huang Xianli, Liu Xiaodan, Wang Ke, Ye Tian, Zhang Tong, Lin Yiqing, Liu Jiawen, Gao Peng.

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And all those who helped with the monitoring work.