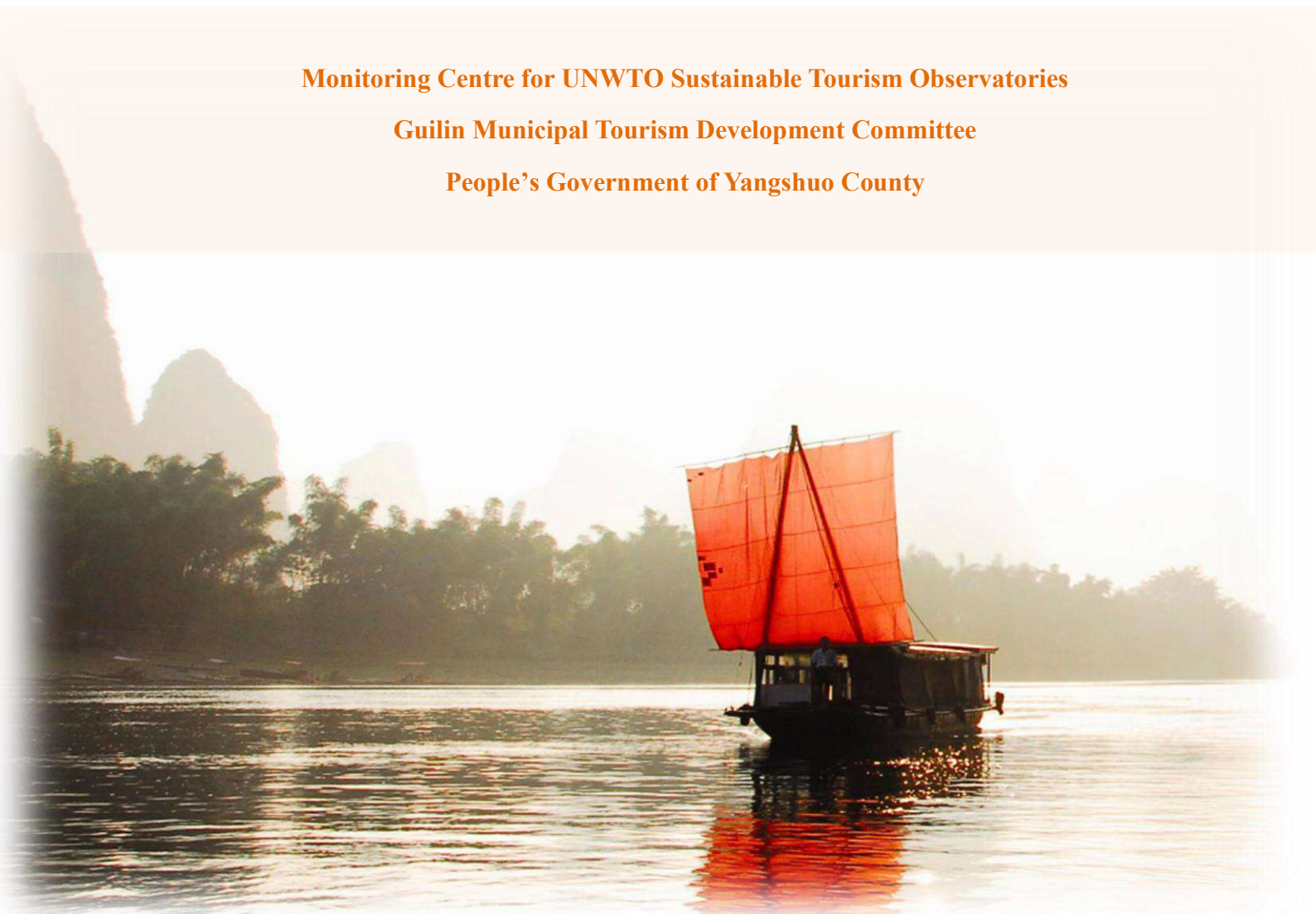


2018 Monitoring Report on the Sustainable Tourism Development of Yangshuo

Monitoring Centre for UNWTO Sustainable Tourism Observatories

Guilin Municipal Tourism Development Committee

People's Government of Yangshuo County



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And all those who helped with the monitoring work.

1. Foreword

1.1 The origin of the monitoring

In 2004, Guilin signed a cooperation agreement with the World Tourism Organization to put tourism data of Yangshuo into the "World Tourism Organization (2012), Indicators of Sustainable Development Tourism Destination - A Guidebook, UNWTO, Madrid). On July 26, 2005, the world's first sustainable tourism observatory was formally established in Yangshuo and an inauguration ceremony was held in October 2009, marking the start of Yangshuo's long-term sustainable tourism monitoring. In September 2010, the United Nations World Tourism Organization signed a cooperation agreement with Sun Yat-sen University to establish UNWTO MCSTO, which is responsible for the management and monitoring of sustainable tourism observatories in China and even the Asia-Pacific region in the future to ensure the continuous, comprehensive and effective monitoring work. This marked the formal completion of the physical establishment of the monitoring center and marked that the cooperation between Sun Yat-sen University and UNWTO in promoting the sustainable development of global tourism has entered into a substantive phase. Since August 2006, the Tourism Development and Planning Research Center of Sun Yat-sen University has successfully completed the monitoring of the sustainable development of tourism in Yangshuo from 2006 to 2016 according to the indicators and methods of the World Tourism Organization's GOST project. MCSTO pays special attention to the indicators of tourism's impacts on Yangshuo's natural resources, ecological environment, social culture and the like. In addition, it also analyses the development conditions of Yangshuo's tourism industry, timely spotting the existing problems of tourism development and taking according corrections and strategies. MCSTO's efforts have been fully recognized by UNWTO and have promoted the sustainable tourism development of Yangshuo and all other tourism destinations.

1.2 Monitoring process

The monitoring period is from July 19 to July 26, 2018, for a total of eight days. The group consists of 27 members, including a professor at the Tourism Development and Planning Research Center of Sun Yat-sen University, three doctoral students, and two master students. 21 undergraduate

students. The monitoring team has visited the West Street, Shili Gallery (Moon Mountain, Rongshu), Yulong River, Old County, Shijiao Taoyuan and Xingping Ancient Town for Chinese and foreign tourists. Questionnaires and random interviews were conducted to community residents, small business owners, employees and foreign practitioners. 1050 questionnaires were distributed for tourists, including 800 domestic tourists questionnaires, 753 valid questionnaires, with 94.13% effective rate, and 250 foreign tourists questionnaires, including 206 valid questionnaires, with an effective rate of 82.4%. A total of 600 resident questionnaires were distributed, of which 539 were valid questionnaires, and the effective rate was 89.83%. A total of 200 employee questionnaires were distributed, 191 valid questionnaires were recollected, and the effective questionnaire rate was 95.5%. A total of 150 questionnaires for small business owners were distributed, 128 of them were valid questionnaires, and the effective questionnaire rate was 85.33%. In addition, the monitoring team conducted a general survey of 2,509 shops along the 27 main and secondary trunk roads in Yangshuo County, and recorded and analyzed changes in their commercial formats. In view of the Yangshuo government's implementation of road traffic control on the Shili Gallery Scenic Spot and the Yulong River Scenic Spot since September 15, 2017, this survey also pays special attention to the attitude of the parties after the implementation of the traffic control policy of the Yangshuo Shili Gallery Scenic Spot one year later.

The monitoring team completed the 2018 Monitoring Report on the Sustainable Tourism Development of Yangshuo, referring to the contents and indicators of *Indicators of Sustainable Development for Tourism Destinations: A Guidebook*, and based on a comprehensive analysis of field investigation data, interview materials, questionnaire data and second-hand materials. The report can be divided into two parts: The overall report covers tourism and community, tourist satisfaction, health and safety, tourism planning and control, tourism economic benefits, tourism and resource environmental protection, tourism products and services, etc. The special section is about the topic of Yangshuo traffic control implementation.

2. Tourism and Community

2.1 Overview

In this monitoring, a total of 600 questionnaires were collected, of which 539 were valid questionnaires, and the effective rate was 89.83%. The questionnaire was distributed from July 19 to July 25, 2018 for a total of 7 days. The distribution sites include West Street, Yitian West Street, Shenshan Road, Longyue Road, Pinci Road, Qitao Street, Jiangjun Road, Yangshuo Park, etc. in Yangshuo County, Yulong River, Dabanshu and other surrounding scenic spots, as well as Xingping Ancient Town.

Yangshuo residents generally agree that the development of tourism has greatly promoted the economic development of Yangshuo and has a greater positive impact on social culture. Residents' satisfaction with tourism development has declined significantly. The negative effects of rising prices and the destruction of the natural environment cannot be ignored. Most residents have no obvious perception of the negative social and cultural impacts caused by tourism, and believe that due to the development of tourism, the emphasis on social security management and moral culture is conducive to local development. The increase in cultural activities and festivals has led more and more people to participate in the activities of promoting traditional culture.

Many residents directly or indirectly obtain economic benefits from tourism development. However, due to factors such as traffic control and commercialization of tourism, the attractiveness of destinations has declined. The number of tourists this year is significantly less than that of the same period of the previous year. At the same time, competition in various industries is more intense, and it is more difficult for tourism practitioners to maintain profit margins. At the same time, residents are more concerned about environmental issues. On the one hand, it is believed that the excessive number of tourists will bring about problems such as traffic congestion and environmental degradation. On the other hand, they also have concerns about the vicious circle of impaired tourism attraction caused by environmental damage. In addition, Yangshuo government and enterprises make full use of WeChat as a communication channel, and at the same time set up relevant industry associations to enhance internal communication and improve communication efficiency. However, for ordinary residents and practitioners, participation and expression channels still have a large space

for construction and improvement.

2.2 Indicator analysis

(1) Residents' overall perception of tourism development

88% of the residents believe that tourism is conducive to local development; 60.3% of residents believe that they can benefit from the tourism industry, decreasing by 11.7% year-on-year; nearly half of the residents (49.2%) are satisfied with the tourism development of Yangshuo, compared with last year at the same time, 84.6% of the residents indicated that they will continue to support Yangshuo to develop tourism, decreasing by 4.9% year-on-year. Most residents believe that tourism is conducive to local development and will continue to support Yangshuo tourism development, but residents are unsatisfied with local tourism development, and residents' overall evaluation of tourism development has declined. In the interviews, it was found that most residents believe that the benefits of tourism development in the past have been more favorable. The decrease in revenue this year is mainly affected by traffic control, and the number of tourists has been greatly reduced. It can be seen that the government's traffic control behavior has had a great impact on the impotence of tourism as a pillar industry. At the same time, some residents mentioned that the commercialization, homogenization and chaos of West Street disrupted the order of the streets and had a negative impact on the attractiveness of Yangshuo's tourist destinations.

(2) Residents' evaluation of the impact of tourism on the environment

More than half of the residents believe that tourism development will bring more serious air, noise and waste pollution to the local environment, and also make traffic more crowded. Residents generally believe that the increase in the number of tourists is the main reason for the decline in environmental quality. Traffic control has alleviated traffic congestion to a certain extent and also reduced vehicle emissions. Therefore, the environmental damage perceived by most residents is still mainly reflected in the increase of traffic and solid waste, and the perception of water pollution and air pollution caused by tourism is relatively weak. In the rapid development of tourism, tourism and environmental protection departments have invested a large amount of funds in environmental

construction. Most residents feel the improvement of environmental protection infrastructure and environmental quality. In terms of environmental awareness, residents pay more attention to the impact of the natural environment in the development of tourism; they also take the initiative to slowly improve themselves, understand and establish a sense of "sustainable development."

(3) Resident and community's participation

The number of residents participating in tourism in Yangshuo is large but not high. Among them, the occupations related to tourism are concentrated in the food and beverage, tourist shops, hotels and other industry (mainly for tourists), etc. The ability still has room for improvement. Most of the residents engaged in the sale and catering of goods mentioned that they were affected by traffic control, the passenger flow decreased, and the benefits were significantly reduced. As a result, many practitioners withdrew from the tourism industry, which may cause the community residents to participate in the tourism industry to decline slightly. In terms of tourism employability, some residents and practitioners have indicated that they can benefit from the employment skills training provided by the government and industry associations. Residents' tourism decision-making participation is enthusiastic but their participation ability is insufficient. Residents do not have convenient and reliable channels and effective ways to understand the dynamics and information of the tourism industry, and the communication channels with the government have not been significantly improved. In addition, residents have insufficient power to participate in decision-making, and there is no clear channel for participation in decision-making. There are still major obstacles in community participation in tourism.

3. Tourist satisfaction

3.1 Research Overview

This survey uses the questionnaire survey method to evaluate the tourist satisfaction of Yangshuo's tourism sustainable development. It mainly surveys tourists' tourist information, tourism impressions, tourism experiences, tourists' perceptions of tourism resources, products and services, and tourist behavior characteristics.

3.2 Tourist behavior characteristics

In terms of travel methods, the self-help travels continued to maintain a high level, the proportion of domestic self-help travels increased significantly, and the proportion of foreign self-help travel declined slightly. The proportion of domestic tour groups has shown a downward trend, while the proportion of foreign tour groups has rebounded. The proportion of travel expenses per unit has dropped, and the tourism market at the conference is still immature.

In terms of tourism information, the network and recommendation of friends and relatives are the primary channels for domestic and foreign tourists to obtain information on Yangshuo tourism. Domestic tourists are more dependent on network information. Traditional information media, such as newspapers, television, and travel book recommendations, are relatively weak in disseminating tourism information.

In terms of tourism motivation, the motivation of domestic tourists is mainly for sightseeing and leisure vacations. Experiencing local cuisine and culture is also one of the important motivations of domestic tourists. Foreign tourists take sightseeing as their main motivation, but foreign tourists are motivated in more ways, such as leisure resorts, local cuisine and culture, wild adventures and photography, all of them account for a considerable proportion. There are significant differences in the motivations of domestic and foreign tourists in the wild, such as climbing projects.

In terms of transportation methods, the choice of means for domestic and foreign tourists to reach their destinations is diverse. Due to the difference in space distance, domestic tourists mainly arrive in Yangshuo by train or self-driving, while foreign tourists mainly rely on trains, airplanes, long-distance buses and cruise ships. Due to the traffic control in Yangshuo, the traffic patterns of tourists in the scenic area are mainly walking, bicycle or electric vehicles. The proportion of domestic tourists choosing self-driving cars and taxis is higher than that of foreign tourists.

In terms of residence time, the stay time of domestic and foreign tourists is mainly 1-3 days of short-term tourism, and the proportion of short-distance tourists has rebounded, and the overall stay time has been shortened.

In terms of accommodation facilities, domestic and foreign tourists have increasingly diversified accommodation options in Yangshuo. Domestic tourists prefer family hotels or star-rated hotels. Foreign tourists prefer youth hostels, family hotels and star-rated hotels. Domestic and

foreign tourists have improved their evaluation of accommodation facilities and the quality of service in the accommodation industry has improved too. The property industry has the potential to become a new business card for Yangshuo.

In terms of consumption levels, although the consumption level of domestic and foreign tourists in Yangshuo is still low, the domestic tourists' travel expenses are generally higher than those of foreign tourists.

3.3 Tourist satisfaction level

The level of customer satisfaction is mainly measured in seven aspects: tourism resources, tourism services, tourism environment, folk customs, overall evaluation, willingness to recommend and willingness to revisit.

In terms of tourism resources, Yangshuo's natural scenery and cultural landscape have been consistently highly evaluated by domestic and foreign tourists. Among all the indicators for measuring tourism resources, tourists have low evaluation of the water quality of the Lancang River and Yulong River, especially foreign tourists.

In terms of tourism services, service evaluations have multiple levels and differences: (1) lack of complaint handling capacity, low efficiency, low evaluation of tourist toilets; (2) domestic tourists are more aware of the unreasonable price of food and beverage; 3) The traffic sign system needs to be more clear and perfect, especially for the English logo of foreign tourists; (4) Yangshuo B&B is widely recognized by domestic and foreign tourists; (5) Domestic tourists pay attention to the homogenization of goods, foreign tourists pay attention to commodity prices and counterfeiting puppet phenomenon, and hope to have more entertainment activities

In terms of the tourism environment, due to the large number of tourists, foreign tourists have low ratings for congestion and noise. Domestic tourists perceive commercialization more than foreign tourists, and foreign tourists have higher acceptance of Yangshuo commercialization. Regarding the perception of human cultural environment, domestic and foreign tourists generally believe that the local residents of Yangshuo are friendly and have convenient interaction with people from different countries or regions.

In terms of folk customs, the overall evaluation of domestic and foreign tourists is low, and the evaluation of foreign tourists is significantly lower than that of domestic tourists. Foreign tourists feel more about folk culture from the diet, and the evaluation of local catering is relatively higher than that of domestic tourists.

In terms of satisfaction, willingness to revisit and willingness to recommend, although the overall satisfaction is higher than expected, and willingness of recommendation of foreign tourists are higher than domestic tourists, due to space distance and other factors, the willingness of foreign tourists to revisit is significantly lower than that of domestic tourists.

3.4 Handling of complaints from tourists

Yangshuo tourists complaints mainly focus on tourism promotion, price, and fraud. The complaints are mainly for travel agencies and shopping stores. In the first half of 2018, Guilin's tourism complaints decreased compared with the same period of last year. The complaints about the level of tour guides and service attitudes were significantly reduced. To some extent, Yangshuo's overall tourism service quality improved. On the whole, the government has achieved certain results in the centralized rectification of the tourism market and the handling of complaints from tourists. However, it is still necessary to strengthen market supervision, effectively protect the rights and interests of tourists and reduce unnecessary complaints and disputes.

4. Health and safety

Most tourists expressed satisfaction with Yangshuo's food hygiene, scenic environment, accommodation security and public security. Among them, domestic tourists are less satisfied with catering hygiene and accommodation safety than foreign tourists, and their satisfaction with the scenic environment and public security status is higher than that of foreign tourists. Residents are not satisfied with local environmental protection and environmental sanitation; residents' satisfaction with public security status and medical services is high. In addition, the relevant departments of Yangshuo County Government actively carry out and promote food safety, environmental sanitation, water source protection and medical disease control, effectively safeguarding the health and safety of Yangshuo and the health and safety of Yangshuo residents and tourists, providing residents with a

safe and hygienic living environment provides visitors with a good travel experience.

5. Tourism planning and control

5.1 Promote the sustainable development of Yangshuo tourism and strengthen the construction of smart tourism

At present, Yangshuo tourism development still needs to focus on its unique natural tourism resources, follow the sustainable development strategy of tourism, and adopt protective development measures to avoid the destruction and over-exploitation of natural resources. Yangshuo's annual number of visitors has increased year by year, and the flow of people varies greatly at different times of the day. Therefore, in addition to the regular and fixed-point flow control of tourists' concentrated spots, it is also necessary to strengthen the maintenance of scenic spots during the peak passenger flow and the prevention of crisis events. At the same time, the government should continue to improve the construction of "Internet + Tourism" and smart tourism systems to achieve the diversion of popular attractions. The development of "global tourism" will fully create a new image of the destination of "painting landscapes and living in Yangshuo" and accelerate the creation of Yulonghe National Tourism Resort and Autonomous Region Ecotourism Demonstration Zone.

5.2 Rational planning and use of tourism land

As a major industry in Yangshuo, tourism needs to develop practical plans with a development perspective and strictly control the implementation of the plan. The increasing number of emerging tourism projects has also increased the pressure on tourism land, responding to the appropriate management of tourism projects, developing a few high-quality projects, improving the quality of the entire Yangshuo tourism industry, and alleviating the contradiction of tourism land use. In the process of planning and control, the government must not only consider tourism transportation, but also consider the factors of tourism resource endowment, land use, urban architectural landscape and humanistic care, and control the influence of negative factors, ensuring its scientific and reasonable planning, in order to make Yangshuo tourism move towards sustainable development

6. Tourism economic benefit

6.1 Tourism drives the economic development of Yangshuo

In recent years, Yangshuo County's tourism income has been increasing, accounting for an increasing proportion of GDP. Tourism has driven Yangshuo's economic development and has become a pillar industry in Yangshuo. This also makes Yangshuo's economic structure relatively simple, and is greatly affected by internal and external factors. If there is a problem in the development of tourism, it may cause Yangshuo's economic development to fall into crisis. At the same time, the Yangshuo government's fiscal revenue is in a state of slow growth, and the economic benefits brought by tourism have not contributed significantly to the Yangshuo government's fiscal revenue.

6.2 Maintain the leading role of tourism and promote the transformation and upgrading of industrial structure

Since the tourism industry has taken the lead in vigorously developing the service industry, the three-industry structure of Yangshuo has undergone significant changes, and changes cannot be separated from government policy guidance. Among them, the tourism industry has driven the rapid development of the economy, which has a profound impact on the three industries, with the proportion of the tertiary industry continuing to rise and the proportion of the secondary industry slowing down as the main trend. On the one hand, Yangshuo should maintain the leading role of tourism and promote regional development. At the same time, the authority should support and guide the structural transformation of the primary and secondary industries to ensure stable economic development and enhance social ecological resilience.

6.3 Investment-inviting projects focus on cultural aspects

In terms of large-scale investment, Yangshuo County's investment promotion projects are mainly concentrated in tourism commercial complexes and cultural related projects. The tourism commercial complex is a product of tourism development to a certain stage, and cultural related

projects can make up for the shortcomings of Yangshuo tourism culture to a certain extent, enrich Yangshuo natural tourism resources, and promote the development of Yangshuo leisure holiday tourism market and culture. Accommodation and leisure and entertainment are the hot industries of Yangshuo investment. These two industries are experiencing small capital withdrawal and large capital entry.

6.4 The attractiveness of investment for small business owners has declined, and the B&B industry is expected to become a new trend.

In terms of individual business investment, the number of stores has stabilized, the proportion of tourism stores has declined slightly, and the proportion of empty shops has increased. Accommodation and catering stores maintained a relatively stable level, while leisure and entertainment stores and travel service stores accounted for a decline. In terms of the use function, the phenomenon of the transfer from the service tourists to the service tourists and residents is presented, and the problem of homogenization of goods is prominent, and the business tends to be saturated. The confidence of business owners in the investment potential of Yangshuo has shown a significant downward trend. They believe that tourists' consumption ability and rent are the biggest factors affecting business operations, and that corporate competition and policies have the second impact on business operations. It is worth noting that Yangshuo B&B has a variety of styles, and its architectural style and business philosophy contain many personal feelings and interests. While attracting tourists, it is also conducive to the construction of Yangshuo culture, which makes Yangshuo's tourism image and brand perception improved.

6.5 The owner's awareness of sustainable development needs to be improved

In general, the owners are satisfied with the natural environment of Yangshuo, and have insufficient understanding of environmental sustainable development. The energy conservation behavior of the owners has decreased compared with last year, but the awareness of energy conservation has improved, and the awareness of sustainable tourism development has also been improved. Therefore, the owners' energy-saving behavior and environmental protection and energy-saving awareness are still not universal enough, and their awareness of sustainable

development still needs to be improved, so as to promote the healthy and sustainable development of Yangshuo tourism.

6.6 Employees have limited work skills, reduced enthusiasm for learning English, and frequent turnover of employees

Yangshuo's employees tend to be younger, and women are the majority. Most of them are not the main economic pillar of the family, and they have more secondary education. Owners generally provide job skills training, but in a traditional way, employees have limited ability to master work skills. Yangshuo's current structural changes in the tourist source market, the decline in the proportion of foreign tourists, the decline in employees' English learning enthusiasm, but the English ability has increased significantly compared with last year. The high turnover of employees' work and the actual turnover rate are unfavorable for the overall service level of Yangshuo tourism, which increases the instability of social employment.

6.7 Residents support tourism development and maintain a conservative attitude towards tourism development

Residents believe that tourism development can bring more employment opportunities to them, but with the implementation of the traffic control policy, residents feel that the number of tourists has dropped significantly. Therefore, compared with last year, they are not optimistic about the opportunities for tourism and employment, and not optimistic about entering the tourism industry in the future. In addition, the attraction of Yangshuo tourism to migrant workers is still on the rise.

7. Tourism and resource protection

7.1 Environmental protection

Yangshuo's tourism development relies on landscapes. The theme is “mountains and rivers in the mountains”. Sustainable tourism needs to pay more attention to the protection of the atmosphere and water environment. After treatment, the improvement of the atmosphere and water environment will not only enable local residents to have a good and suitable living environment, but also provide

visitors with a good and beautiful leisure and entertainment environment, and improve the satisfaction of local tourism and residence.

7.2 Noise control

A large number of tourists have increased the noise in Yangshuo Scenic Area, and the noise intensity in the West Street is too large. The competition for sound space and the hawker screams make the entire West Street full of ubiquitous noise, which not only interferes with the rest of the residents and tourists, but also reduces the satisfaction of tourists. In particular, the satisfaction of foreign tourists is not conducive to the future development of West Street. Therefore, it is necessary to control the key noise sources and rectify the West Street sound space.

7.3 Sanitation Arrangement

With the surge in tourists every year in Yangshuo, the direct impact is environmental damage and increased solid waste. While developing tourism, it is incumbent upon the environmental health of the scenic spot. At present, the solid waste in Yangshuo is increasing. There are littering in the scenic area and outside. The regular road cleaning vehicles and cleaning staff are equipped. The garbage disposal is more effective and timely, but needs to be maintained and strengthened.

7.4 Landscape maintenance

Landscape maintenance and visual impact are part of sustainable tourism. Residents still lack awareness of landscape maintenance. At the same time, some residents still do not agree with the importance of landscape maintenance. Therefore, it is still necessary to continue to publicize and educate local residents and improve residents' consciousness and attention to environment. In the process of developing the new district, the government should pay more attention to landscape maintenance and be more cautious about land demolition and protect traditional buildings.

7.5 Energy conservation

Enterprises do not understand the importance of energy, and do not understand the measures to save water and electricity. At the same time, they lack funds and equipment to implement energy

conservation. The government should increase the concept and specific measures for promoting energy conservation and emission reduction. The government should conduct measures to encourage small businesses to implement energy conservation, such as providing subsidies and subsidies for energy conservation and emission reduction, to promote the implementation of energy management and achieve sustainable development.

8 Tourism products and services

8.1 There are certain regularities and differences in the motivations of domestic and foreign tourists.

Sightseeing and leisure are the main motivations for domestic and foreign tourists. Experiencing local food and culture as well as photographing rank third and fourth. With the improvement of traffic accessibility, people's living standards have improved, and short-distance travel has become possible in a short period of time. More domestic tourists choose to use a shorter time to rest and relax in a non-conventional environment, while foreign tourists choose to take sightseeing as their primary purpose which is much higher than the proportion of leisure vacations.

8.2 Tourist attractions are more concentrated in spatial distribution

Yangshuo tourism attractions are mostly distributed on the banks of Minjiang River, West Street and Shili Gallery. On the one hand, such a spatial distribution can facilitate the travel of tourists, reducing the time and expense spent on the connection of attractions. At the same time, the distribution of too concentrated spots has also brought about traffic congestion, diversion difficulties and the development of marginal tourist attractions.

8.3 Foreign tourists are more rational in tourism consumption

Domestic tourists love the handicraft shops. Although foreign tourists are more interested in handicrafts, most foreign tourists choose to leave instead of buying after visiting or watching. In order to attract more foreign tourists and even domestic tourists to spend on handicraft products and souvenirs in Yangshuo travel, it is necessary to improve the locality and uniqueness of these

products.

8.4 Use the network to create tourism information inquiry and tourism scenic spot marketing platform

The network is the main source of domestic and foreign tourists' access to Yangshuo tourism information. Tourists' expectations for cultural information are gradually rising. Yangshuo should pay more attention to the output of its tourism culture. From the perspective of landscape and humanities, it will popularize and introduce Yangshuo culture to tourists on the platform, so that tourists have a better understanding about Yangshuo before traveling.

9. Yangshuo traffic control implementation monitoring

9.1 Yangshuo Traffic Control Implementation Overview

The Yangshuo County Public Security Bureau issued the "Announcement on the Implementation of Road Traffic Control in the Shili Gallery Scenic Spot and Yulong River Scenic Spot in Yangshuo County" on September 10, 2017, stipulating that since September 15, 2017, the traffic control in Shili Gallery Scenic Spot and Yulong River will be issued. Since traffic control involves more subjects, different stakeholders have different opinions and opinions on this.

9.2 Views and opinions of different stakeholders

Tourists: Self-driving tourists are blocked and the number is small; the travel experience of team tourists is declining, and the travel experience of individual travelers is rising.

Residents: For one of the stakeholders in the traffic control zone, the local residents, their views and attitudes are affected by factors such as location and occupation. Residents in the district believe that the travel is inconvenient and the roads are crowded; the residents in the district think that it is inconvenient to go to work and the income is reduced; other residents think that the accident is reduced and the environment is quiet. Participation in the reduction of income of the tourism industry is mostly against traffic control. Those who do not participate in the tourism industry think that the traffic is orderly and the environment is quiet. Most of them are neutral. Non-related practitioners

have shown a more positive attitude towards traffic control. They believe that traffic control reduces vehicles, traffic is more orderly, the environment is quieter and pollution is reduced, which greatly solves the problem of traffic congestion on holidays. However, residents will still complain that it is inconvenient for them to travel, increasing travel time and costs.

Small tourism business owners: Small tourist enterprises located near the “Shili Gallery” and near the Yulong River Basin, with reduced passenger flow and reduced turnover, of which the catering industry is more negatively affected than the lodging industry. Shanshui Transportation Investment Co., Ltd. is equipped with a B&B cycle dedicated line for the B&B along the route, but the supply of shuttle bus services is insufficient and the operating costs of the accommodation industry increase. The tourism small business response plan has not kept up, making the service quality face challenges and the number of complaints from tourists has increased. Tourism small businesses located outside the traffic control area are also facing huge challenges due to the reduced number of tourists, but some small businesses have voices of understanding and support policies.

“Traffic operators” mainly refer to bicycles, electric car rental companies and Uber drivers. After the implementation of the traffic control policy, the demand for transport vehicles has increased dramatically, which has further promoted the transportation industry. There are a large number of illegal travel workers, which have a significant impact on local residents, tourists and illegal workers. The government should pay close attention to this and prepare for risk estimation, and there are hidden dangers in the safety of tourists. Thus, traffic practitioners need to be standardized and managed.

Online media: Criticism and questioning are across the web. Online media is an important medium to guide public opinion. Most online media have questioned and denied attitudes toward traffic control. They believe that traffic control has caused the people to “get rid of poverty and become poor”, which has caused the Yangshuo industry to encounter “cold winter” and thus affect the development of “global tourism”.

Tour guides and travel agencies: Tour guides are difficult to lead, travel agencies reduce the number of groups. Traffic control restricts bus access to scenic spots, increases the difficulty of guiding tour groups, reduces the number of travel agencies, and weakens the willingness of travel agencies. After one year of adjustment, the travel agency can purchase discounted scenic spots for

sightseeing. The travel agency will still arrange a small number of routes to Shili Gallery and Yulong River Scenic Area for visitors to choose, but the number of arranged tours is much less.

10 Conclusion

10.1 Community residents' evaluation on tourism development is more negative than in previous years

Yangshuo residents generally believe that the development of Yangshuo tourism will greatly promote the local economic development, and they can benefit from tourism and are willing to support the development of Yangshuo tourism. Residents' overall evaluation of tourism development has been reduced, especially for the satisfaction of local tourism development and the degree of benefit from tourism. The main reason should be that traffic control has a great impact on the impotence of tourism as a pillar industry. Residents perceive negative effects such as rising prices and natural environmental damage. On the other hand, more than half of residents feel good about environmental protection. Many residents believe that tourism development pays more attention to social security management and moral culture, but it still needs improvement.

10.2 Community residents are more willing to participate in tourism and tourism decision-making, but their participation and ability are not high, and there is room for improvement

Yangshuo residents have a strong willingness to participate in the tourism industry, and most residents have expressed their willingness to participate in the tourism industry. However, most of the residents mentioned that they were affected by traffic control, the number of customers decreased, and the benefits of the industry decreased significantly. Many practitioners withdrew or engaged in other industries, and a considerable part of residents' willingness to participate decreased. Residents have strong willingness and enthusiasm for participating in tourism decision-making, but the actual participation and ability are not high. Residents' participation in decision-making is insufficient. Residents still have major obstacles in obtaining policy information. Thus, the government should increase residents' participation in accessibility and participation is a goal that communities and

governments need to continue to work hard.

10.3 The network and friends and relatives recommendation are the main ways to obtain tourist information. The population of self-help and sightseeing tours is not reduced.

In terms of tourism information, the network and friends and relatives recommendation dominate, and the information preferences of domestic and foreign tourists are significantly different. The proportion of tourism information obtained by traditional media channels has decreased, and the proportion of online tourism information has increased. The self-help tour becomes popular while the group tour is not that popular as before. In terms of tourism motivation, domestic tourists are more interested in tourism, mainly for sightseeing and leisure vacations, while foreign tourists have more diversified tourism motives, such as sightseeing, leisure, experience, local cuisine, field exploration and photography. Sightseeing tourism is still a tourist hotspot for domestic and foreign tourists. Therefore, the Yangshuo County Government should continue to pay attention to the construction of sightseeing tourism in Yangshuo County, providing more sophisticated services for domestic and foreign tourists.

10.4 Diversified modes of transportation, self-driving tour becomes popular, and overall stay time is shortened

Domestic and foreign tourists have a variety of transportation options, and trains and long-distance buses are frequently used by domestic and foreign tourists. Due to the hot self-driving tour, the government should pay attention to strengthening the standard handling of self-driving parking lots and traffic order. The proportion of tourists who choose bicycles and taxis in Yangshuo has increased compared with last year, and the way of travel is greener and healthier. In terms of residence time, domestic and foreign tourists are mainly short-term tourism, and the overall stay time is shortened. On the other hand, the proportion of foreign tourists staying for more than 15 days is higher, but the proportion has decreased. For this part of the “immigrant” tourists, the government should pay attention to their living conditions.

10.5 Accommodation options are diversified, the level of tourists' consumption has risen overall, and consumer awareness has changed.

Yangshuo's tourist accommodation facilities are diversified, and family hotels, youth hostels and star-rated hotels are more popular. In recent years, high-end theme hotels and homestays have been hot, and more and more tourists are choosing themed resorts and high-end hotels instead of star-rated hotels at the same price. In terms of consumption levels, the total personal spending of tourists has risen overall, and domestic tourists spend more than foreign tourists. In recent years, the improvement of the quality of Yangshuo's tourism experience activities has achieved certain results in increasing tourism economic income. Domestic tourists have greater potential in tourism spending and can moderately deepen high-end product mining.

10.6 The overall satisfaction of tourism resources is high, and the natural scenery and cultural landscape are well evaluated, but the water quality evaluation is relatively low.

Domestic and foreign tourists agree that Yangshuo is rich in natural resources; on the other hand, tourists have low evaluation of the water quality of the Lancang River and Yulong River. Domestic and foreign tourists give high evaluation of Yangshuo cultural landscape, and think that the government need to continue to protect and inherit, while natural landscape needs to pay attention to environmental protection and governance, especially the water quality should be strengthened.

10.7 The efficiency of complaint handling in scenic spots needs to be improved, the tourist toilets need to be improved, and the transportation services need to be rectified.

The service quality of the staff in Yangshuo tourist scenic spot is good, and the level of tour guides is high, but it still needs to be improved in the efficiency of travel complaint handling and travel toilets. In terms of tourism transportation services, the evaluation has declined compared with last year: domestic tourists have mixed evaluations on transportation convenience. Most domestic tourists said that although there will be some inconvenience after the road closure, the overall traffic in Yangshuo is still convenient; foreign tourists strongly disagree with the traffic performance of Yangshuo. The decline in traffic service evaluation was due to the traffic control policy implemented

on September 15, 2017 and the lack of a traffic signage system for foreign tourists.

10.8 Accommodation, catering and entertainment services are generally satisfactory and can be upgraded slightly

The tourist accommodation service in Yangshuo County is highly evaluated in terms of safety and health, reasonable price, and quality of service for food and accommodation staff. The evaluation from foreign tourists is higher than that from domestic. Domestic and foreign tourists generally believe that Yangshuo food has characteristics, health and safety, but the price of food and beverage is high; most foreign tourists can accept Yangshuo food and beverage prices. Domestic and foreign tourists have a low degree of approval for “reasonable prices of tourism commodities”, indicating that the prices of Yangshuo tourism commodities are high; in terms of commodity differentiation, domestic tourists tend to think that the types of tourism goods are similar, while foreign tourists generally do not know tourism commodities. The homogenization is serious, and most of them can buy satisfactory souvenirs and handicrafts, and think that this is a commodity with local characteristics.

10.9 The overall tourism environment is good, the perception of commercialization of domestic and foreign tourists is different, the congestion of the scenic spot is still obvious, and the folklore experience is insufficient.

Yangshuo's natural scenery is well-known at home and abroad. The unique tourism resources attract a large number of Chinese and foreign tourists, and tourists are highly satisfied with its natural environment. The evaluation of local residents, accommodation environment and entertainment environment is relatively high. Yangshuo's overall tourism environment is relatively good. Domestic visitors are significantly more aware of commercialization than foreign tourists. Foreign tourists generally believe that the Yangshuo scenic spot is crowded, while domestic tourists consider it acceptable. Domestic and foreign tourists' perception of folk customs is generally low, especially for foreign tourists. In addition to the high perception of ethnic minority diets and the diversity of activities, other perceptions such as religious activities, marriage customs, festivals are lower.

10.10 Overall satisfaction of domestic and foreign tourists is higher, generally higher than expected

Domestic and foreign tourists have high satisfaction with Yangshuo tourism. The satisfaction of foreign tourists is higher than that of domestic tourists, but it has decreased compared with last year. The satisfaction of domestic tourists has increased compared with last year. Most domestic and foreign tourists believe that the travel experience is higher than expected or in line with expectations, a significant increase from last year. In terms of revisiting and recommending willingness, domestic tourists have a higher revisit rate. There are a large number of tourists in Yangshuo. As the accessibility increases, the possibility of tourists revisiting will also increase. Foreign tourists may seek a sense of freshness, and due to space restrictions, they don't have strong willingness to revisit.

10.11 The overall health and safety environment is good, but it is still necessary to create a tourism-safety environment.

Yangshuo's health and safety status is at the upper-middle level. The Yangshuo County government has increased the handling of tourism environmental safety and on-site surprise inspections this year to ensure food safety and food hygiene. Most visitors expressed satisfaction with the Yangshuo scenic environment. In terms of accommodation security, more than 90% of domestic and foreign tourists are neutral, agree or strongly agree with the safety of accommodation. In terms of social security, domestic and foreign tourists have higher satisfaction with Yangshuo's social security. More than half of the residents believe that tourism has caused more environmental pollution to Yangshuo. In terms of crime rate, residents have little difference in the crime rate of Yangshuo, and most residents have a positive attitude toward the security situation of Yangshuo.

10.12 Tourism resource planning and control maintains a focus on customer needs

In terms of tourism resource planning and control, Yangshuo County proposed “One-pole, One-zone, Six-axis” tourism scenic spots strategy in the “Planning”. In response to the needs of domestic and foreign tourists, the government should strengthen the development of corresponding humanities, deepen the cultural heritage of Yangshuo, and highlight the regional characteristics of

northern Guangxi; for foreign tourists, the government should maintain the original flavor of the community, focus on the development of the community Tourism and rural leisure tourism with Yangshuo characteristics. In terms of tourism land use, the “Yangshuo County Master Plan (2012-2030)” proposes a regional tourism spatial layout of “one core, two slices and three belts” within the county-level tourism development plan.

10.13 Tourism has become a pillar industry in Yangshuo, and the three major industrial structures have been continuously optimized.

Tourism has become a pillar industry in Yangshuo. However, the tourism industry alone makes Yangshuo's economic structure single and prone to economic fluctuations. The Yangshuo government's fiscal revenue is in a state of slow growth, which is manifested in the state of "enriching the people and not making wealth." In recent years, Yangshuo has been continuously attracting investment. The investment projects are mainly concentrated on the level of tourism products and infrastructure construction. It can not only ensure and improve the normal life of residents, but also meet the basic needs of tourists. The new investment introduced in 2017 is concentrated in tourism comprehensive. The development of both body and culture complements the short-term cultural resources of Yangshuo. The potential of Yangshuo cultural tourism has been gradually stimulated, and the hotel has become a new tourist attraction of Yangshuo.

10.14 Investment attractiveness declines, business format should adjust with demand

Tourism small business owners generally believe that the commercialization of West Street is serious, the overall investment attraction is declining, and shop rents are rising year by year, which makes the store business situation continue to deteriorate. Tourism-related shops still dominate, and the number of empty shops has increased compared to last year, and there are still a large number of homogenized stores. The store is functionally represented by the phenomenon of simply serving tourists to the service. In tourism-related shops, accommodation and restaurant stores maintain a stable level. From the perspective of tourism investment projects, hotels and leisure entertainment are the hot industries of Yangshuo investment, showing small capital withdrawal and large capital entry. Shops in the tourist center area are relatively stable, while shops in other areas are transitioning

to serve tourists. In the changing state of business, business owners also consciously move closer to local characteristics to enhance their competitiveness.

10.15 Insufficient energy conservation awareness of tourism small enterprises, environmental sanitation needs to be improved, and noise pollution control needs to be strengthened

In general, Yangshuo County's tourism resources and environmental protection are in good condition. The government is constantly striving for environmental protection and has introduced relevant environmental protection policies and programs. At present, it has achieved certain results. In terms of environmental pollution, more than half of the residents have a clear perception of atmospheric and water pollution, while tourists generally hold a positive and optimistic attitude. However, residents and tourists have a strong perception of noise pollution. With the increase in the number of tourists per year in Yangshuo, it has a direct impact on the environment, and the most obvious trend is the increase in solid waste. In terms of energy management, most enterprises lack energy-saving awareness or lack of material basis such as capital and equipment. Therefore, the government should increase publicity and take certain measures to encourage or help small and medium-sized enterprises to carry out energy conservation management and achieve sustainable energy development.

10.16 Designing tourism products for the needs of foreign tourists in China, and rationally distributing service facilities

The main motives for domestic and foreign tourists in Yangshuo are sightseeing and leisure. Photography and experience of food and culture are the focus of domestic and foreign tourists, and thus the government can design different types of products for different needs of domestic and foreign tourists. Yangshuo County has a wide range of service facilities, which can meet the needs of tourists and residents. However, the regional distribution is not reasonable while the commercial atmosphere is strong. The shops with high concentration of tourists are too concentrated, and the concentrated areas of residents and the areas where tourists and residents mix accommodation. The limited number of shops for tourists is less attractive to tourists, which is not conducive to the

diversion of tourists in the scenic spots.